



Colorectal Cancer Screening Programme

Primary Care Doctor

How to assign clinical assistant?

(ver. Feb 2021)

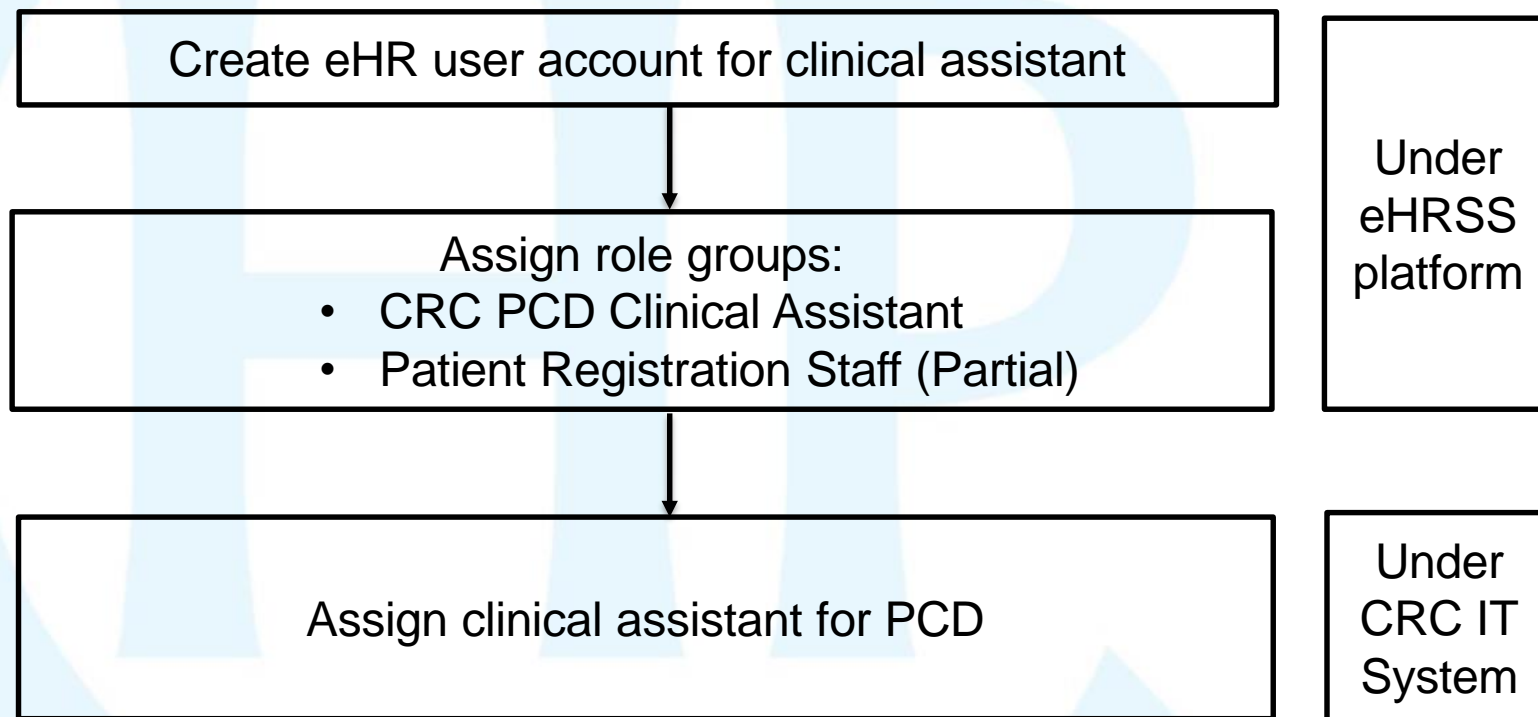
Assigning clinical assistant

- PCD may wish to assign clinical assistants to undertake certain tasks
 - Processing participant enrolment
 - Educating participant about the use of FIT, specimen collection and return of specimen to Specimen Collection Point
 - Viewing FIT results under the “To-do List” of assigned PCD
 - Contacting participant regarding FIT result and follow-up action
- PCD are strongly encouraged to assign clinical assistants well in advance in order to ensure the smooth running of screening service at their clinic



Summary diagram of procedures

(without existing eHR user account for clinical assistant)



Summary

eHRSS-related steps

User Administrator (UA) of the HCP needs to make the following arrangements:

- Step 1 (slide 5)
 - Obtain the personal information, internet email address, mobile phone number, etc. of clinical assistant
- Step 2
 - Create eHR user account for clinical assistant (slide 7 to 12)
 - (or if clinical assistant already has eHR user account, proceed to Step 3 to assign role group for clinical assistant)
- Step 3 (slide 13 to 18)
 - Assign role group for the clinical assistant, ie "CRC PCD Clinical Assistant" and "Patient Registration Staff (Partial)"

CRC IT System-related steps (slide 19 to 24)

- Once all 3 steps have been completed under eHRSS, PCD can assign clinical assistant through CRC IT System



eHRSS-related steps

Step 1

- UA should obtain the personal information, internet email address, mobile phone number, etc. of clinical assistant.
- The mobile phone number used by clinical assistant will be used to receive the eHRSS notification (if desired communication means is “SMS”) and also the SMS of One-Time Password (OTP) for the login of eHRSS by clinical assistant.
(For enquiry, call at 3467 6230)



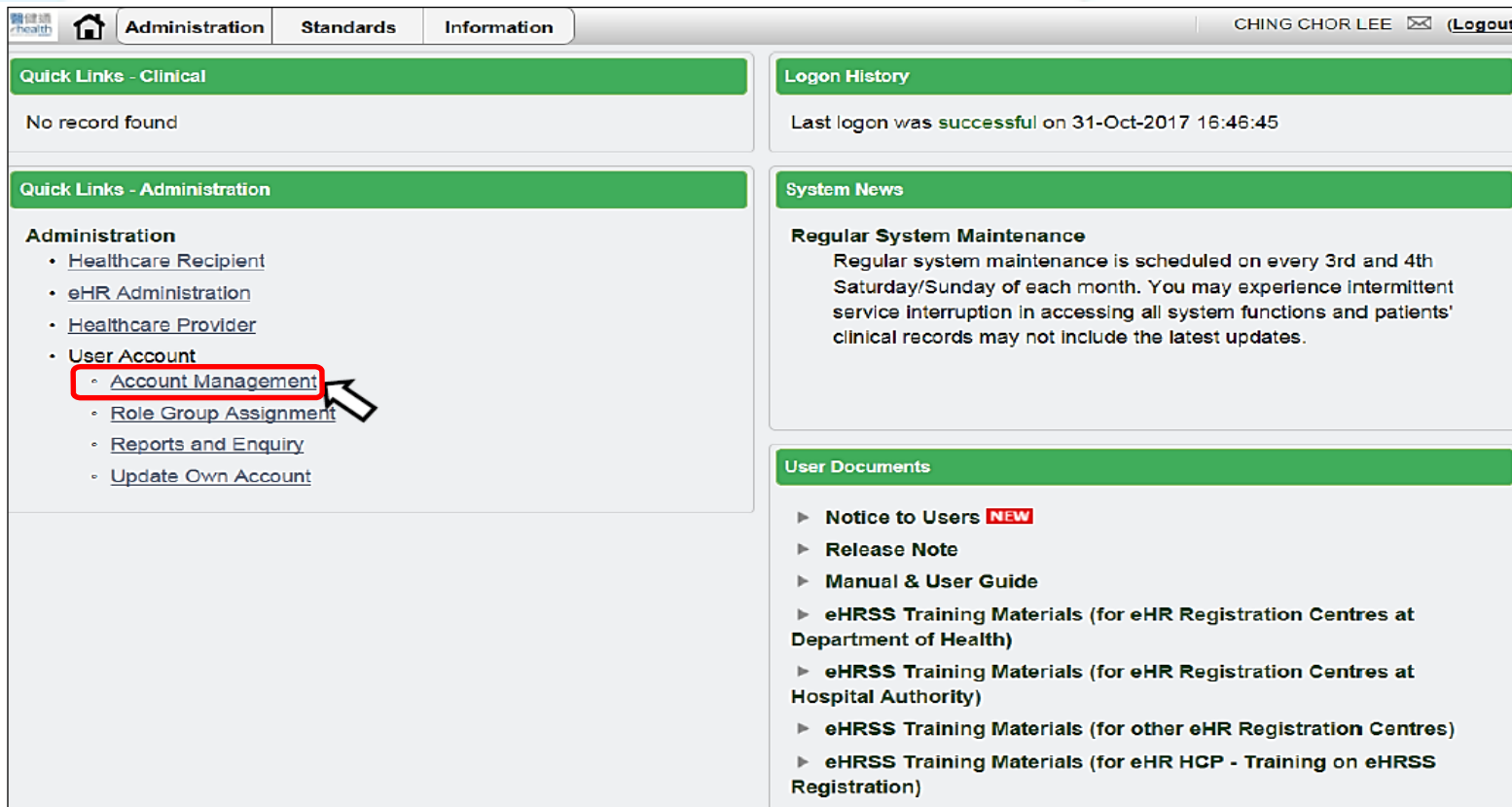
eHRSS-related steps

Step 2

- Follow the procedures on **slides 7 to 12** to create eHR user account for clinical assistant if UA does not have any existing eHR user account for clinical assistant and UA is **assigning clinical assistant for the first time**.
- Follow the procedures on **slides 13 to 18** to assign role groups for clinical assistant if the **clinical assistant already has eHR user account**.



eHRSS-related steps: create eHR User account (1)



The screenshot shows the eHRSS Administration interface. The top navigation bar includes 'Administration', 'Standards', and 'Information'. The user is logged in as 'CHING CHOR LEE' with a 'Logout' link. The left sidebar contains 'Quick Links - Clinical' (No record found) and 'Quick Links - Administration'. Under 'Administration', there is a list of links: 'Healthcare Recipient', 'eHR Administration', 'Healthcare Provider', 'User Account', 'Account Management' (highlighted with a red box and a black arrow), 'Role Group Assignment', 'Reports and Enquiry', and 'Update Own Account'. The main content area has three sections: 'Logon History' (Last logon was successful on 31-Oct-2017 16:46:45), 'System News' (Regular System Maintenance: Regular system maintenance is scheduled on every 3rd and 4th Saturday/Sunday of each month...), and 'User Documents' (Notice to Users **NEW**, Release Note, Manual & User Guide, eHRSS Training Materials for eHR Registration Centres at Department of Health, eHRSS Training Materials for eHR Registration Centres at Hospital Authority, eHRSS Training Materials for other eHR Registration Centres, eHRSS Training Materials for eHR HCP - Training on eHRSS Registration).

- Log in eHRSS
- At the landing page, click “Account Management”

eHRSS-related steps: create eHR User account (2)

Account Management

Manage User Account

Search a user

To list out users of your healthcare provider, please use the "List user of my healthcare provider" button.

List user of my healthcare provider

You can search a user by providing HKIC No. / Document ID, Surname and Given Name.

ID Doc Type: HKID Card

HKIC No.: V000322 0

Surname: CHEUNG

Given Name: CHUN CHIN

Search

1. Input HKIC No., Surname and Given Name at Search User page and click <Search>

- Check whether eHR user account already existed for the clinical assistant

eHRSS-related steps: create eHR User account (3)

Account Management

Manage User Account

Create New User Account

Healthcare Provider: RG PRIVATE HOSPITAL

Personal Information

ID Doc Type*: HKID Card

HKIC No.*: V000322

Surname*: CHEUNG

Given Name: CHUN CHIN

Chinese Name: 張進興

Contact Phone No.: 24646464

Post Title: MD

Title (English): Doctor

Contact Person: ☐

Fax No.: 23646494

Title (Chinese): 醫生

Contact / Notification Information

Communication Means*: Email

Internet Email Address*: chunchin@rgprivatehospital.com

Mobile Phone No.*: 98186426

Re-enter Internet Email Address*: chunchin@rgprivatehospital.com

Administrative Institution

Healthcare Service Location*: RG PRIVATE HOSPITAL - KLN BAY - 5531407205

Name: RG PRIVATE HOSPITAL - KLN BAY

Contact No.: Unit A, 18/F, CHEVALIER COMMERCIAL CENTRE, 8 WANG...

Address: Unit A, 18/F, CHEVALIER COMMERCIAL CENTRE, 8 WANG...

2. i) Input Personal Information
ii) Input Contact/Notification Information
iii) Select main working location at Administration Institution

These fields were pre-filled when UA clicked "Search" in step 1 (see slide 8)

- If eHR user account has not been created before, UA should input the relevant information as stated in the above diagram
- "Mobile Phone no." is a mandatory field and is also for receiving SMS for One-Time password by default



eHRSS-related steps: create eHR User account (4)

3.
 - i) Input User Name
 - ii) Select Second Authentication Factor

Login Information

User Name*:

User Name must be 6 to 20 alphanumeric characters

Second Authentication Factor*:

One-Time Password

▼

One-Time Password / Mode A is required for:
1. Healthcare Professional to view eHR record
2. User Admin to manage user account

- Select One-Time Password as “Second Authentication Factor”

eHRSS-related steps: create eHR account (5)

Prime Relationship Information

Healthcare Staff Type*: Relationship End Date:

Relationship Start Date*:

Professional Registration Information

Professional Category*:


Professional Registration Number*:

- Select Healthcare Staff Type
- Select relationship start and end date
 - Note: if the clinical assistant to be assigned is a Healthcare Professional eg. Registered Nurse, the system will prompt for “Professional Category” and “Professional Registration Number”
- Click “Create”



eHRSS-related steps: create eHR User account (6)

Notification

 User Account is created successfully
eHR UID: 9764252922
User Name: cheungch

User's information will be sent to respective medical professional boards/councils for verification. User's current account status is set to 'Pending'.

Upon successful verification, you and the user will be notified of the result.

The process is almost completed, still one step to go...
Please assign access right to the user at Role Group Assignment

For Healthcare Professional only

- Pop-up notification will be displayed once eHR user account is created
- The clinical assistant and User Administrator will receive notification via desired communication means eg. e-mail
- Click “Assign Access Right” to assign role group (see “Step 3” for details)



eHRSS-related steps: assign role group (1)

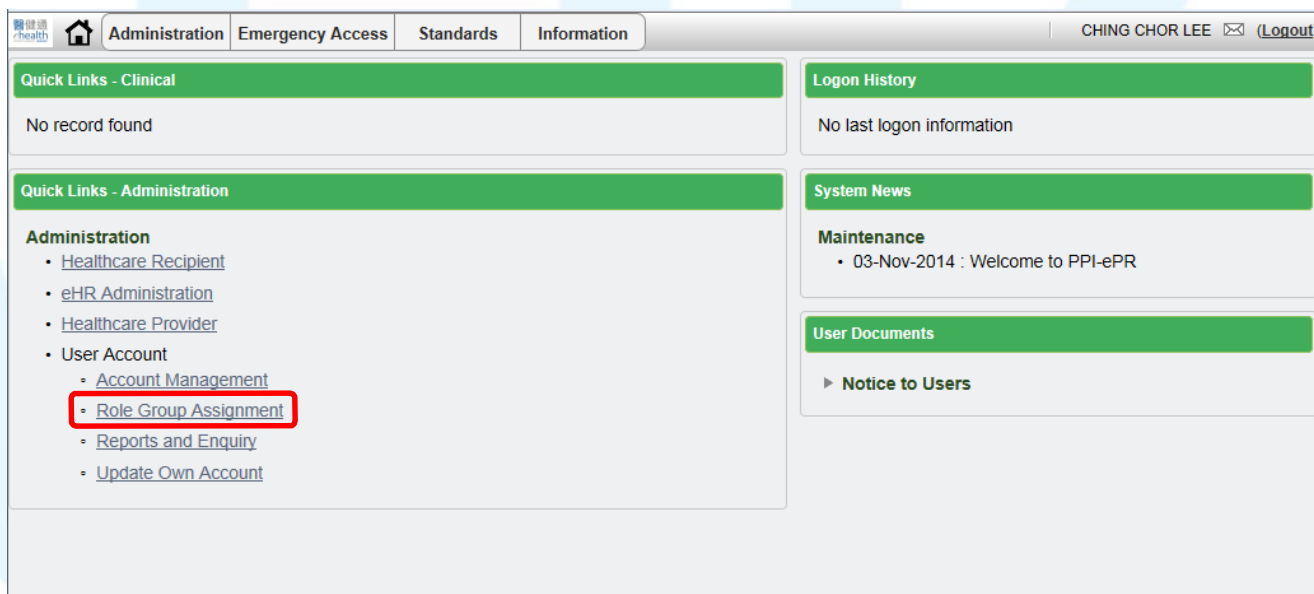
Step 3

- After eHR user account has been created, User Administrator should then **assign role group** for the clinical assistant
- **2 role groups** should be assigned
 - **CRC PCD Clinical Assistant**
 - **Patient Registration Staff (Partial)**



eHRSS-related steps: assign role group (2)

- If clinical assistant already has existing eHR user account but role group “CRC PCD Clinical Assistant” and “Patient Registration Staff (Partial)” were not assigned at the time of account creation, UA can assign role groups for the Clinical Assistant at “Role Group Assignment”.



- At the eHRSS landing page, click “Role Group Assignment”

eHRSS-related steps: assign role group (3)

Role Group Assignment

Assign Role Group to HCS

Search Criteria

Search By*:

Search Value:

Find

Search Result

eHR UID	User Name	Edit User
7355657170	leesheung	Edit User

- UA can search the clinical assistant by the selected search criteria eg. by using the User Name
- Click “Find”
- Search result will be displayed
- Click “Edit User”



eHRSS-related steps: assign role group (4)

Role Group Assignment

Assign Role Group to HCS | Assign/View Role Group to HCP

User Information

eHR UID: 7355657170
User Name: leesheung
Account Status: Active

Relationship Information

HCP	Relationship Type
RG - 3598496873	Prime

HCP Selection

The HCP selected: 3598496873
HCP: RG - 3598496873

- Select desired HCP



eHRSS-related steps: assign role group (5)

Role Group Assignment

Assign Role Group to HCS

Assign/View Role Group to HCP

User Information

eHR UID: 7355657170
User Name: leesheung
Account Status: Active

Relationship Information

HCP	Relationship Type
RG - 3598496873	Prime

HCP Selection

The HCP selected: 3598496873
HCP: RG - 3598496873

Assign Role Group Information

Role Group Start Date*: 25-Jan-2016
Role Group End Date: dd-MMM-yyyy

Role Group Code	Role Group Name	
CRC_PCD_CLI_ASSISTANT	CRC PCD Clinical Assistant	<input type="checkbox"/>
PATIENT_REG_PARTIAL	Patient Registration Staff (Partial)	<input type="checkbox"/>

- A list of available role groups will be displayed (for simplicity, only the two required role groups have been displayed in this document)

Expand All Collapse All

Save Back



eHRSS-related steps: assign role group (6)

Assign Role Group Information

Role Group Start Date*: 25-Jan-2016

Role Group End Date: dd-MMM-yyyy

Role Group Code	Role Group Name	
CRC_PCD_CLI_ASSISTANT	CRC PCD Clinical Assistant	<input checked="" type="checkbox"/>
PATIENT_REG_PARTIAL	Patient Registration Staff (Partial)	<input checked="" type="checkbox"/>

Expand All Collapse All

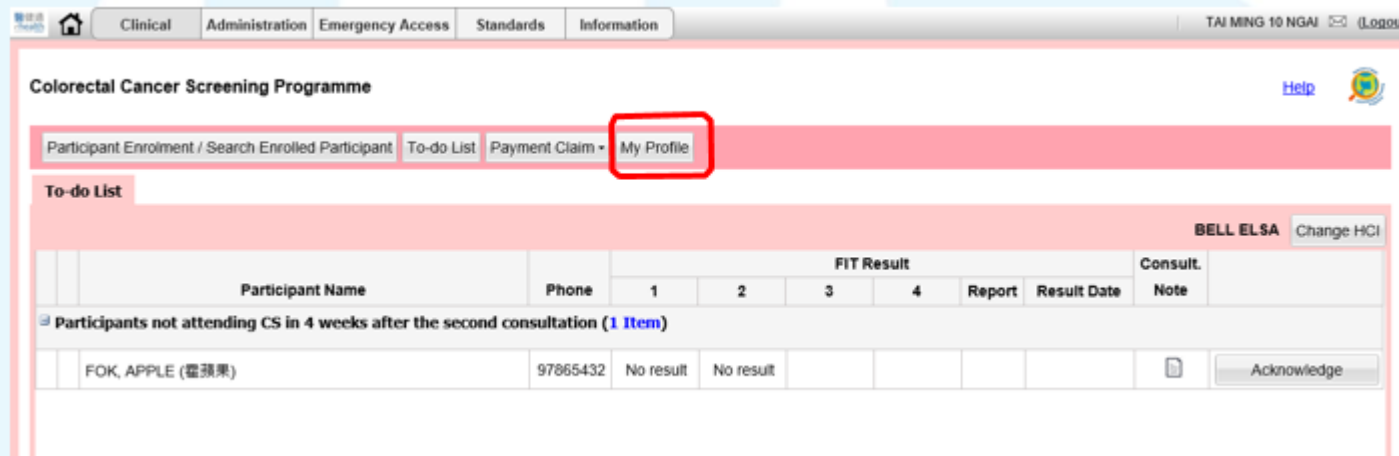
Save Back

- Check the box of **CRC PCD Clinical Assistant** and **Patient Registration Staff (Partial)**, in order to assign those role groups to the clinical assistant
- Click “Save”
- “Assign Role Group Result” will then be displayed



CRC IT System-related steps: assign clinical assistant for PCD (1)

- Once all 3 steps have been completed under eHRSS, PCD can now assign clinical assistant through CRC IT System

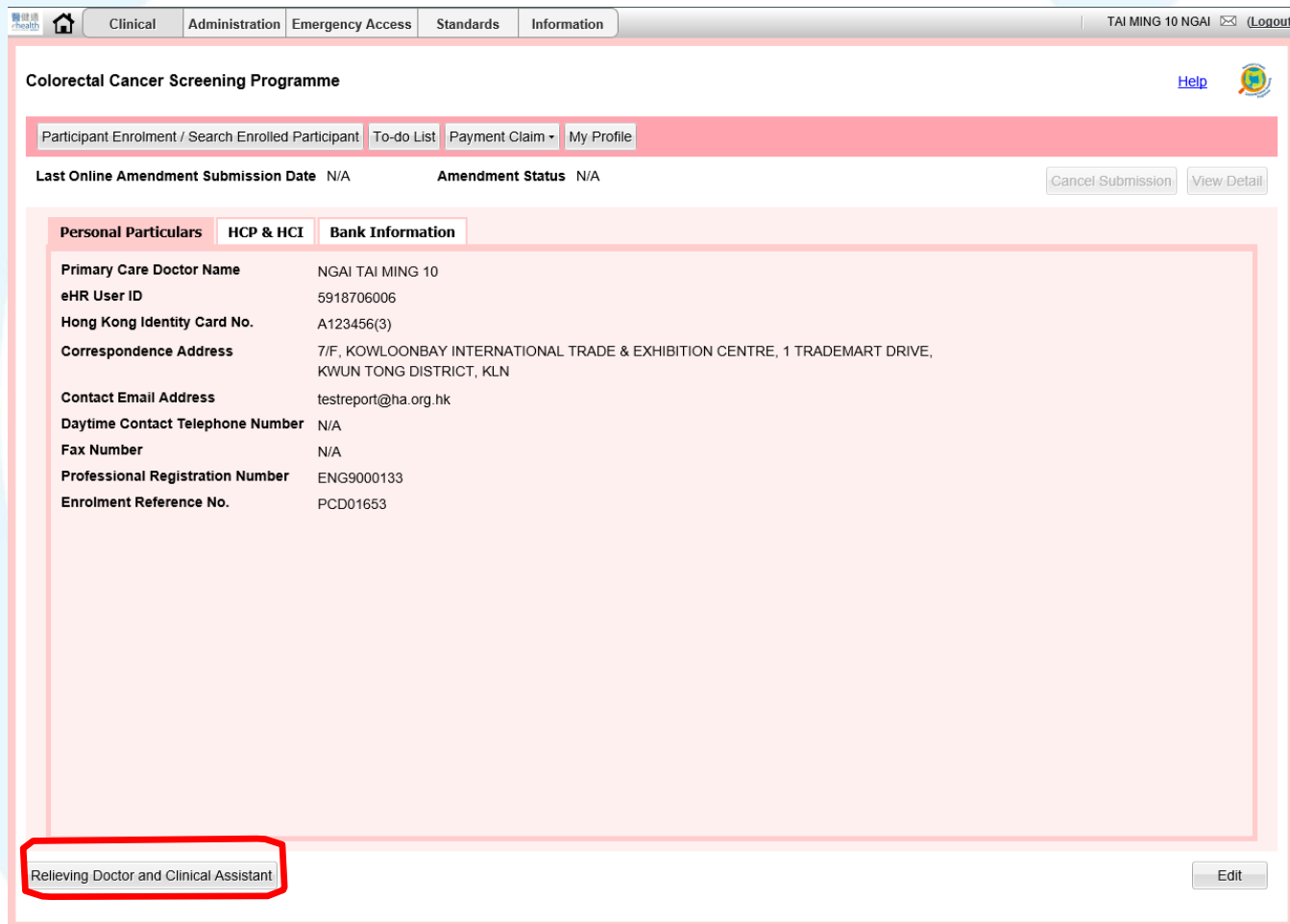


The screenshot shows the CRC IT System interface. At the top, there are tabs for Clinical, Administration, Emergency Access, Standards, and Information. The 'Colorectal Cancer Screening Programme' is selected. Below this, there are four sub-tabs: Participant Enrolment / Search Enrolled Participant, To-do List, Payment Claim, and My Profile. The 'My Profile' tab is highlighted with a red box. Below the sub-tabs, there is a 'To-do List' section. It shows a table with columns for Participant Name, Phone, FIT Result (1, 2, 3, 4), Report, Result Date, Consult. Note, and an Acknowledge button. The table contains one row for 'FOK, APPLE (霍頌果)' with phone number '97865432' and 'No result' for FIT Result 1 and 2. A 'BELL ELSA Change HCI' button is also visible.

- Log in CRC IT System
- Click “My Profile” tab



CRC IT System-related steps: assign clinical assistant for PCD (2)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim My Profile

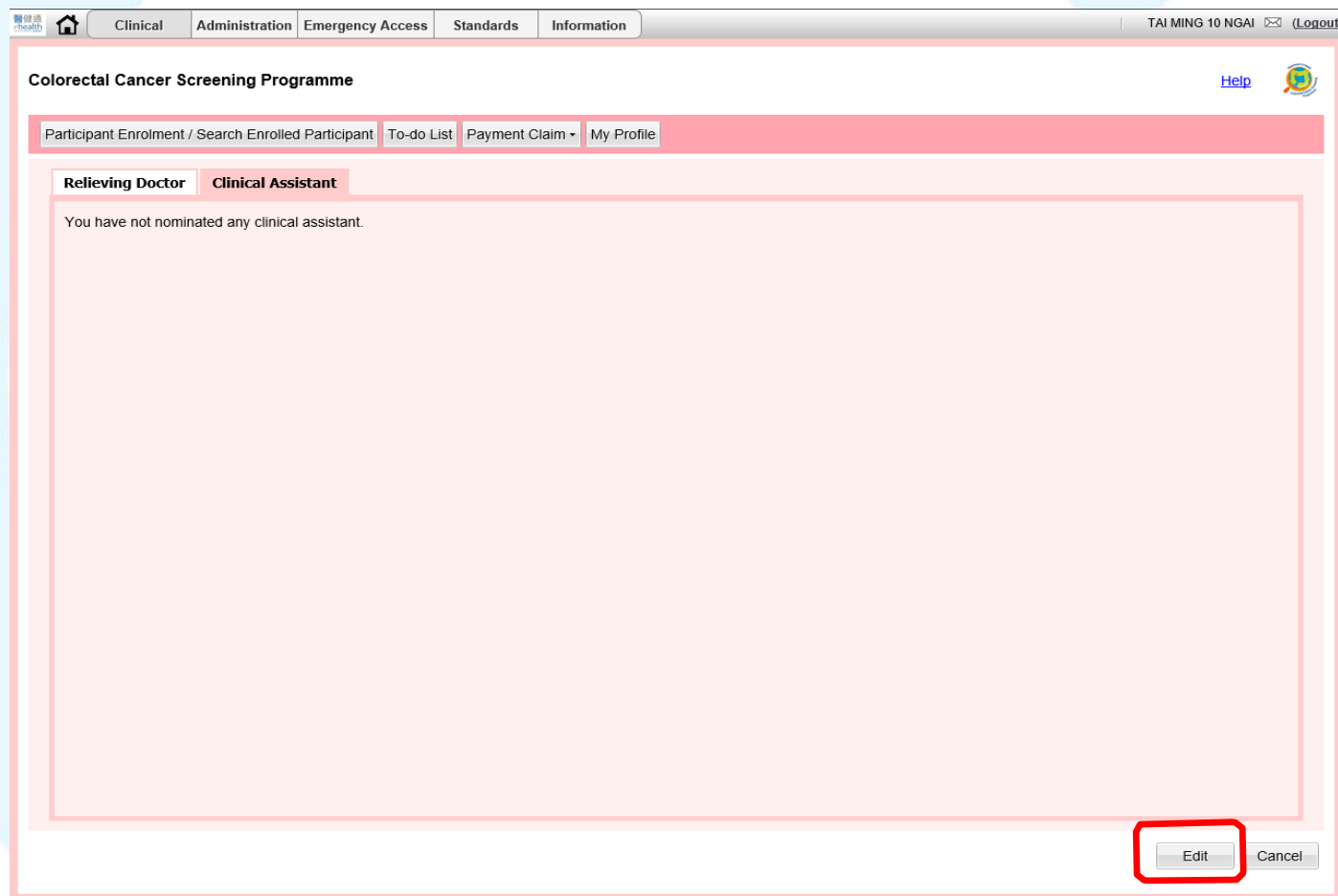
Last Online Amendment Submission Date N/A Amendment Status N/A Cancel Submission View Detail

Personal Particulars	HCP & HCI	Bank Information
Primary Care Doctor Name	NGAI TAI MING 10	
eHR User ID	5918706006	
Hong Kong Identity Card No.	A123456(3)	
Correspondence Address	7/F, KOWLOONBAY INTERNATIONAL TRADE & EXHIBITION CENTRE, 1 TRADEMART DRIVE, KWUN TONG DISTRICT, KLN	
Contact Email Address	testreport@ha.org.hk	
Daytime Contact Telephone Number	N/A	
Fax Number	N/A	
Professional Registration Number	ENG9000133	
Enrolment Reference No.	PCD01653	

Relieving Doctor and Clinical Assistant Edit

- Click “Relieving Doctor and Clinical Assistant” button

CRC IT System-related steps: assign clinical assistant for PCD (3)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim My Profile

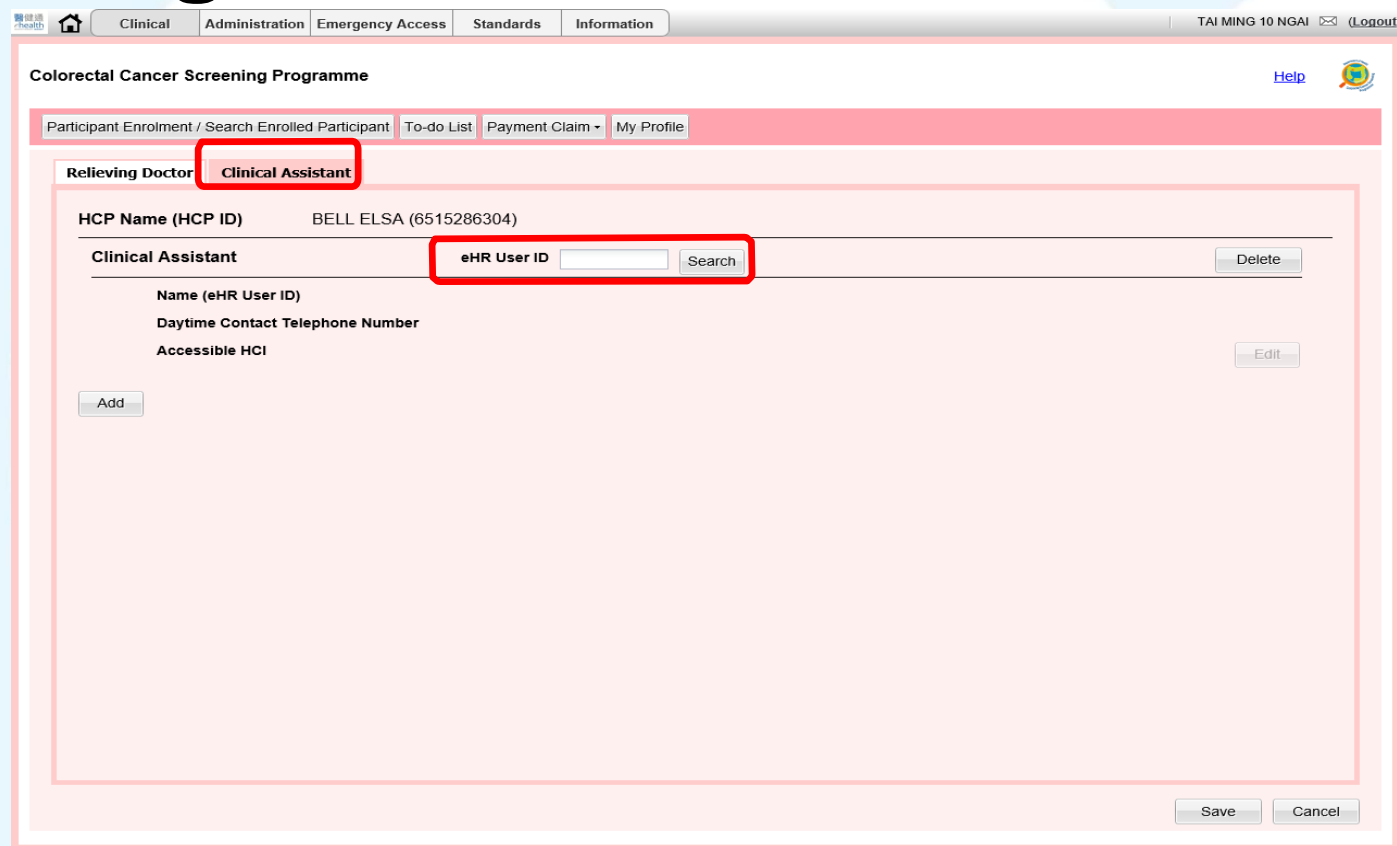
Relieving Doctor Clinical Assistant

You have not nominated any clinical assistant.

Edit Cancel

- Click “Edit” button

CRC IT System-related steps: assign clinical assistant for PCD (4)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim My Profile

Relieving Doctor **Clinical Assistant**

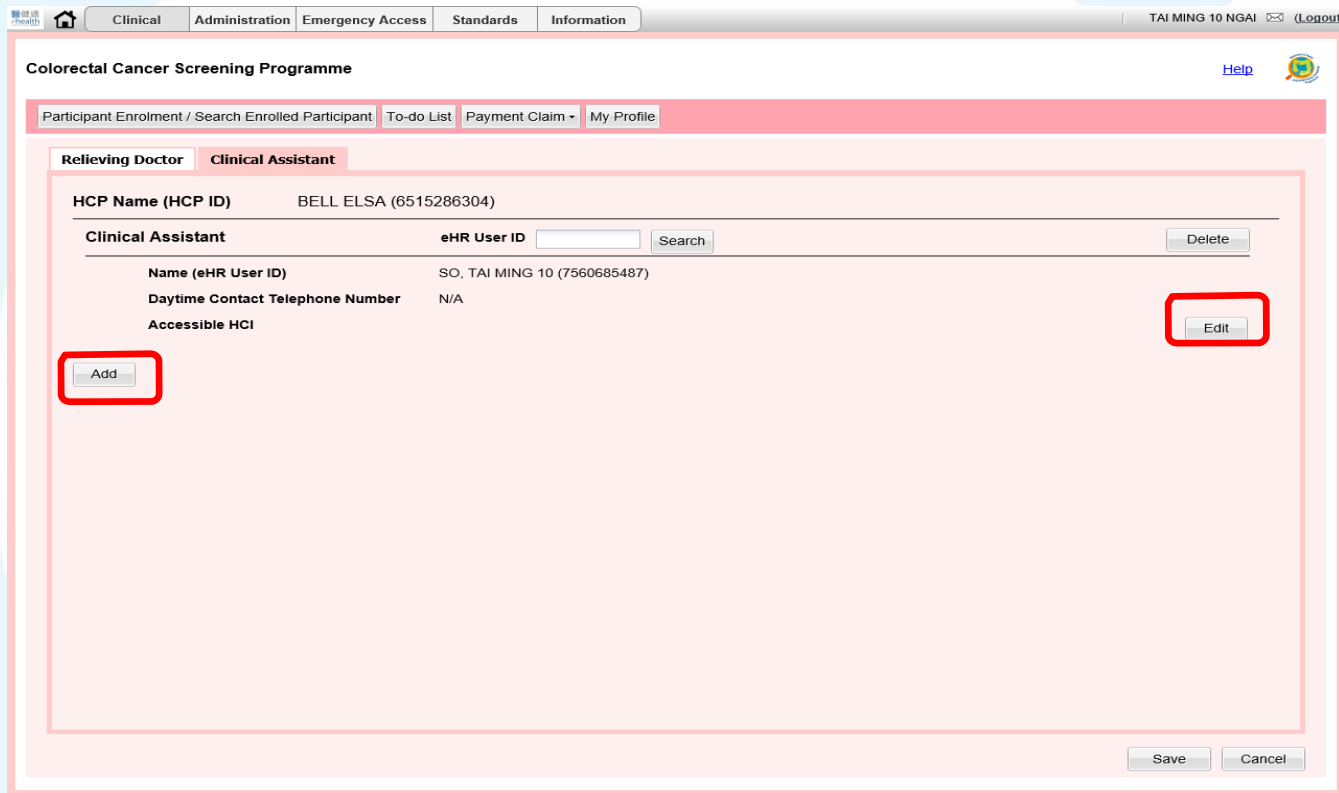
HCP Name (HCP ID) BELL ELSA (6515286304)

Clinical Assistant **eHR User ID**

Name (eHR User ID)
Daytime Contact Telephone Number
Accessible HCI

- Click “Clinical Assistant” tab
- Type in eHR User ID of the clinical assistant
- Click “Search” button

CRC IT System-related steps: assign clinical assistant for PCD (5)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim - My Profile

Relieving Doctor Clinical Assistant

HCP Name (HCP ID) BELL ELSA (6515286304)

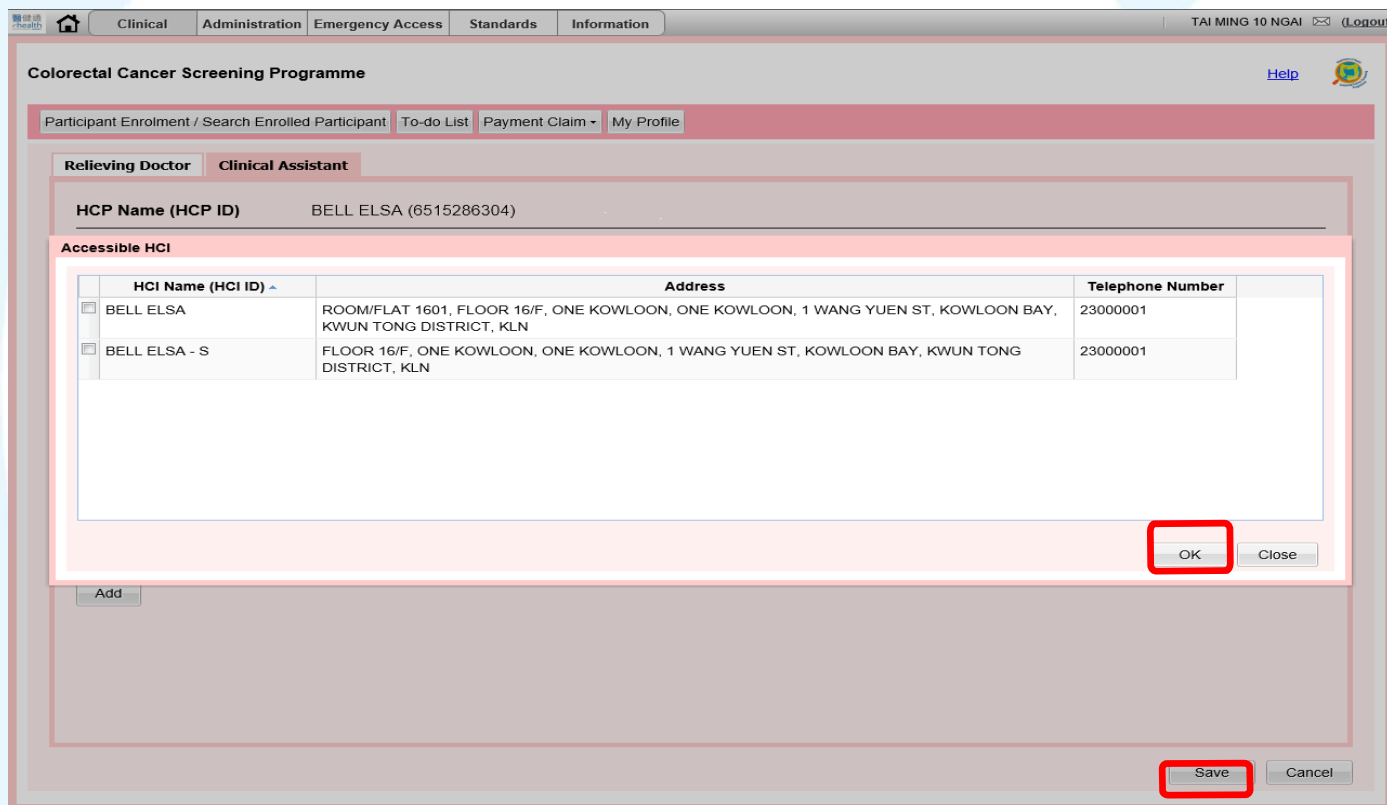
Clinical Assistant	eHR User ID	Name (eHR User ID)	Daytime Contact Telephone Number	Accessible HCI
	SO, TAI MING 10 (7560685487)		N/A	

Add Edit

Save Cancel

- Click “Add” button when details of the desired clinical assistant have been found
- Click “Edit” button to select HCI where the clinical assistant can have access to

CRC IT System-related steps: assign clinical assistant for PCD (6)



Colorectal Cancer Screening Programme

Participant Enrolment / Search Enrolled Participant To-do List Payment Claim My Profile

Relieving Doctor Clinical Assistant

HCP Name (HCP ID) BELL ELSA (6515286304)

Accessible HCI

HCI Name (HCI ID)	Address	Telephone Number
<input checked="" type="checkbox"/> BELL ELSA	ROOM/FLAT 1601, FLOOR 16/F, ONE KOWLOON, ONE KOWLOON, 1 WANG YUEN ST, KOWLOON BAY, KWUN TONG DISTRICT, KLN	23000001
<input type="checkbox"/> BELL ELSA - S	FLOOR 16/F, ONE KOWLOON, ONE KOWLOON, 1 WANG YUEN ST, KOWLOON BAY, KWUN TONG DISTRICT, KLN	23000001

OK Close

Add

Save Cancel

- Click appropriate box of HCI Name
- Click “OK” button
- Click “Save” button