

Bulk Patient Portal Registration Project

THINK Hauora has been working with general practice teams in the MidCentral district to support patients to register for the patient portal. This project commenced within two weeks and started with a pilot sample of 1,000 patients from a general practice.

We negotiated a contract with an identity verification service that utilises Cloudcheck software to check and confirm identity. THINK Hauora contacted general practice teams asking if they wanted support to register and activate eligible consumers onto the patient portal that aligns to their PMS given Telehealth services via patient portal would be useful during the COVID lockdown. A number of general practices indicated their interest.

THINK Hauora agreed the process with the interested general practices and commenced the project which has resulted in a pleasing increase in portal activations. Consumers feedback to general practice is that the online identity verification process was easy and appreciated given this could be completed without leaving home. Consumers could verify their identity using drivers' licence, NZ passport, NZ birth certificate or NZ citizenship. For security reasons, the period available for consumer to complete the verification was time-sensitive and expired after seven days.

For more information on Cloudcheck see the Ministry of Health link here: www.health.govt.nz/news-media/news-items/patient-portals-use-cloudcheck-verify-identity.

THINK Hauora did not have time to arrange a media campaign to support the project, but an interview was arranged to support the start of the initiative:

www.stuff.co.nz/manawatu-standard/news/120893144/push-made-for-more-patients-to-join-healthcare-portal-scheme

This project commenced in March and will be complete at the end of June 2020.

Key steps:

Project set up	<p>The following was set up (in rapid time) to have a platform to manage the bulk patient portal project:</p> <ul style="list-style-type: none"> • Internal <ul style="list-style-type: none"> - set up dedicated email address to have all verified records default to - identify one person to upload the Cloudcheck spreadsheets and change their email address in Cloudcheck to the dedicated email address (all verified records will go there) - set up folder levels and create rules to manage the types of emails coming in - set up a separate Patient Portal phone number • External <ul style="list-style-type: none"> - engage with Verifi Identify and manage contracting requirements - complete documents to have THINK Hauora approved to be set up (NZTA for Drivers Licence; DIA for Passport, NZ Birth Certificate) - undergo training with Cloudcheck
----------------	---

Prepare practice for roll out	<p>Don't roll out to all practices in one big burst.</p> <ul style="list-style-type: none"> • Determine priority (recommend one practice a week) Process is a 7-day cycle – and there is a lot to do within that week. • Liaise with the key personnel at The Practice and get approval to proceed • Query and extract the eligible patient data i.e. over 16, no patient portal, unique email address • Prepare the data for the roll-out <ul style="list-style-type: none"> - identify and mark any duplicate emails in Master spreadsheet - CloudCheck provide a spreadsheet/maximum of 500 records per upload
Practice roll out	<p>The three steps involved for the patient are:</p> <ol style="list-style-type: none"> 1. Introduction email from THINK Hauora <ul style="list-style-type: none"> – email from PatientPortal@thinkhauora.nz from Think Hauora as introduction and advising an email from THINK Hauora Cloudcheck will be sent - THINK Hauora will monitor the bounce back emails and note them in the master spreadsheet - THINK Hauora remove known duplicates from the master spreadsheet extracted and have that information on a separate tab 2. Email from THINK Hauora Cloudcheck (Verifi Identity) <ul style="list-style-type: none"> – email from THINK Hauora Cloudcheck with the link for the patient to verify their details by drivers licence, NZ Passport, NZ birth certificate, NZ citizenship. - subject line can reference Practice name - area for personalised content - that information is available to be verified for seven days / this will be tracked. All responses saved and information captured. 3. Confirmation of registration/activation email <ul style="list-style-type: none"> – verified and approved records to be activated in either MyIndici or Manage My Health. THINK Hauora work with the practices to manage this. <p>Screen shot examples will be in the appendix</p>
THINK Hauora process – high level	<p>The key steps to manage the patient portal bulk registration are:</p> <ol style="list-style-type: none"> 1. Send out Introduction email 2. Monitor the email mailbox 3. Manage any 'bounced' emails and mark up in The Practice Master spreadsheet 4. Log into Cloudcheck and upload all the Practice file spreadsheets created – patients have 7 days to respond to the VerifyMe <i><Wait for responses to come in – first two days are traditionally the most hectic></i> 5. Patients respond and once their data has been checked through VerifyMe the response is emailed to the dedicated email address

	<ol style="list-style-type: none">6. Email opened and log into Cloudcheck for result:<ul style="list-style-type: none">- updated spreadsheet (VP- verify pass/VF- verify fail)- save PDF into Practice folder<i><The link expires after 7 days – some people email requesting a new link – this can be done></i> At the end of the Practice cycle7. Prepare summary sheet8. Finalise spreadsheet9. Email the practice with the summary, final spreadsheet and link to PDFs for the Practice to save down to their system
--	--

If you have any further queries, feel free to contact:

Robyn Smart | Programme Lead
Network Development & Support
robyn.smart@thinkhauora.nz
Mobile: 021 671 247

Appendix

Introduction email example

Stay connected with your General Practice team

You are receiving this email from THINK Hauora, your local Primary Health Organisation, on behalf of <your General Practice Team>

THINK Hauora manages the primary healthcare services that are delivered to the community, including the services you receive from <your General Practice Team. >

We invite you to stay connected with your General Practice using their online patient portal.

Please be assured that your General Practice Team is still open and here to support you. The support provided to you by your General Practice Team may be delivered in a different way than in the past.

Doctors, Nurse Practitioners and other health professionals will be using telephone, email and video consultations and connecting with people through patient portal messaging. Face-to-face visits will still be available. Your nurse, GP or Nurse Practitioner will let you know if they need to see you in person.

Using your General Practice's patient portal is a great way to stay connected. Your portal will help you communicate quickly and safely with your General Practice team without visiting the practice in person and you can access a lot of your own personal health information. Your portal may be used to request repeat prescriptions, view laboratory results such as blood tests, see your current diagnosis, medications and medical conditions and send and receive secure messages between you and your general practice.

Almost one million New Zealanders use a patient portal. For more information on portals at the Ministry of Health. www.health.govt.nz/our-work/digital-health/other-digital-health-initiatives/patient-portals

THINK Hauora is helping people register onto the patient portal. Here is what to expect:

In the next few days, you should receive two emails which will ask you to provide some information so that you can get your own personal portal set up:

Email 1: You should receive an email from THINK Hauora's CloudCheck provider¹ which will ask you to provide personal details from your Driver's Licence, Passport or Birth Certificate so we can confirm your identity and maintain your privacy.

Once your details have been confirmed, THINK Hauora will process your registration on to your General Practice's patient portal.

Email 2: You should receive an email from Indici, your General Practice's online patient portal, confirming your registration onto this patient portal. You will be asked to activate your registration by logging into your new portal and entering an activation code.

indici
practice anywhere

Email

Password

Remember Me

Login

Forgot Password?
If you are not able to login click [here](#) for help.

We need you to open your patient portal and type in the activation code. This is quite a long code, please don't be put off. Access to your patient portal is worth it!

THINK Hauora is using an identity verification service with Cloudcheck software to check and confirm your identity. This process was carried out in person when you registered through your General Practice Team. Our online process will verify your identity without needing to leave home. For more information on Cloudcheck see the Ministry of Health link here: www.health.govt.nz/news-media/news-items/patient-portals-use-cloudcheck-verify-identity

If you have any questions about our online patient portal registration process, please ring THINK Hauora at 06 354 9107 and select option 2 or email us at patientportal@thinkhauora.nz. More information can also be found on our website here www.thinkhauora.nz/node/1290

Please note: at all times, THINK Hauora and your General Practice team will be following the guidelines set by the Ministry of Health.

Ngā mihi | Regards

Lyn Daly
General Manager – Network Development and Support



**1 Verify Identity Services are the organisation that run the CloudCheck Development software*

THINK Hauora CloudCheck insert

THINK Hauora, your local Primary Health Organisation, on behalf of <your General Practice team>, is inviting you to stay connected with your General Practice using their online patient portal. This identity check is to help THINK Hauora to confirm your identity and keep your personal health data safe. Note: this link is only valid for seven days.

THINK Hauora will use this to register you on <your General Practice> patient portal which can help you communicate quickly and safely with your General Practice team without visiting the practice in person and you can access a lot of your own personal health information.

Almost one million New Zealanders use a patient portal. For more information on portals at the Ministry of Health. www.health.govt.nz/our-work/digital-health/other-digital-health-initiatives/patient-portals

If you have any questions about our online patient portal registration process, please ring THINK Hauora at 06 354 9107 and select option 2 or email us at patientportal@thinkhauora.nz.

More information can also be found on our website here www.thinkhauora.nz/node/1290

CloudCheck screen examples



To begin the verification process, please provide your details...

Name Kim | | Vardon
Given * Middle Family *

DOB | | |
Day * Month * Year *

To verify your date of birth, please select and enter the relevant details for at least one of the following databases...

- NZ Driver's Licence
- NZ Passport
- NZ Birth Certificate
- NZ Citizenship Certificate

I confirm that I agree to Verifi and THINK Hauora using the data provided, including for the purpose of verifying my identity against the following sources in accordance with Verifi's [privacy policy](#) and other policies listed on Verifi's website: [New Zealand Birth Certificate](#), [New Zealand Citizenship](#), [New Zealand Passport](#), [NZTA \(Driver's Licence\)](#). Note: some sources may not be checked.

Cancel **CONTINUE**



©2020 POWERED BY VERIFI

To verify your date of birth, please select and enter the relevant details for at least one of the following databases...

NZ Driver's Licence

NZ Driver's Licence

Please provide your Licence number so we can verify you, and make sure that your name entered above exactly matches the name shown on your Licence.

Licence Number *

The licence number is printed on your licence under the heading '5a' or 'Licence'.

Licence Version *

The version is printed on your licence under the heading '5b' or 'Version'.

- NZ Passport
- NZ Birth Certificate
- NZ Citizenship Certificate

I confirm that I agree to Verifi and THINK Hauora using the data provided, including for the purpose of verifying my identity against the following sources in accordance with Verifi's [privacy policy](#) and other policies listed on Verifi's website: [New Zealand Birth Certificate](#), [New Zealand Citizenship](#), [New Zealand Passport](#), [NZTA \(Driver's Licence\)](#). Note: some sources may not be checked.

Cancel

CONTINUE

Once patients have completed their details, they are asked to confirm or edit and then the form is submitted.

CloudCheck example – Verification result



< CLOUDCHECK GO
SIGNED IN AS REBECCA WALKDEN. ACCOUNT SIGN OUT

CURRENT SITE IS ID
SWITCH SITE

CLOUDCHECK GO
REPORTING

Verification Result - PASS

Reference ID :
Request Date 02 April 2020 10:20
Requested By Robyn Smart – Cloudcheck Go

Response

Name Verified
Date of Birth Verified

Sources

Status	Source	Checked	Notes
PASS	NZTA (Driver's Licence)	Name, Date of Birth	License Match: Yes Date of Birth Match: Yes First Name Match: Yes Middle Name Match: Yes Last Name Match: Yes

Details

Name :
Date of Birth :
NZ Driver's Licence - Licence Number :
NZ Driver's Licence - Licence Version 074

Verification

Verification Date 02 April 2020 10:22
Verification Reference 9877a121-7c8f-45b2-8611-1d1c55a157d7

Consent Given YES
Consent Wording I confirm that I agree to Verifi and THINK Hauora using the data provided, including for the purpose of verifying my identity against the following sources in accordance with Verifi's privacy policy and other policies listed on Verifi's website: NZTA (Driver's Licence). Note: some sources may not be checked.

IP Address 203.114.164.51



©2020 POWERED BY VERIFI

This file is saved as a PDF – THINK Hauora chose to save it using the patient's NHI off the master spreadsheet.