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	A Guide to Implementing Clinical Assessment Services			
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A Guide to Implementing Clinical Assessment Services

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Related Documents:

These documents will provide additional information.

Ref no	Doc Reference Number	Title	Version
1	NPFIT-NPO-GEN-IP-0067	Glossary of Terms Consolidated.doc	<enter latest>

Glossary of Terms:

List any new terms created in this document. Mail the NPO Quality Manager to have these included in the master glossary above [1].

Term	Acronym	Definition

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1. Purpose

This document is intended to explain to PCTs and provider organisations what they need to do to configure and use Choose and Book to support Clinical Assessment Services. This document points to other documents that describe how to carry out the steps required.

2. Background

The decision on whether to operate any form of CAS is a local clinical decision and NPFIT is not placed to offer advice in this area. This document assumes a decision has been made to operate a CAS and describes how that is enabled through Choose and Book.

This document assumes that the reader is aware of the prerequisites to using the Choose and Book application (Including User Registration, Hardware specification, smart cards etc.).

3. What are Clinical Assessment Services?

“Clinical Assessment Services” is a generic term that is used to describe a variety of services provided by the NHS. They may have different names in different local health communities – and they may not exist in some – but they have a common shape:

- A referring clinician agrees with a patient that the patient needs to be referred to another service.
- Rather than a referral to an out-patient appointment or similar, the patient is referred to a Clinical Assessment Service who will assess the patient and advise on the next course of treatment. The options available include:
 - Referral to an out-patient clinic
 - Referral to “Tier two” services
- The CAS may make an assessment by physically seeing the patient (in which case, some form of treatment may be undertaken) or by reviewing the clinical referral details and discussing the options with the patient by telephone.

Note that, for the purposes of this document and the operation of Choose and Book, a CAS is condition-/diagnosis- specific. It is possible a LHC may be operating CAS services for several conditions/ diagnoses from one location. For Choose and Book, these are separate Clinical Assessment Services as they would appear to be ‘different services that happen to be in the same building’ from the patient’s perspective.

The first release of Choose and Book focused on referrals to out-patient clinics, working with technically compliant PASEs, booking appointments directly into the providers’ systems. Release 2 brings additional functionality to support referral to CAS and the ability of CAS to refer onward to another care provider via the Choose and Book application.

A CAS may be a directly bookable service or an indirectly bookable service (IBS) [see “Implementation Guide for Indirectly Bookable Services” for more information on IBS].

4. Defining a Clinical Assessment Service in the Directory of Services

Release 2 of Choose and Book brings added functionality to several component parts of the service, to support CAS.

4.1. Identify and Define the Service

The clinicians and staff who provide the service will agree the definitions and descriptions of the service, any key words to be associated with the service, specific booking guidance and the instructions to be made available to patients who wish to book into that service.

The steps and information required to complete this process are detailed in the document "Describing Services Available in Choose and Book", available at <http://nww.chooseandbook.nhs.uk/documents.asp#services>.

Services need to be described and defined in a particular, standard format, if they are to load onto the DoS correctly and be available appropriately.

There is a standard DoS Data Gathering template, updated to reflect R2, available at <http://nww.chooseandbook.nhs.uk/implementation/directory.asp> (in the section "Populating and Maintaining Directory of Services") which should be used when preparing to load the service onto the DoS.

Particular thought needs to be given to appointment slots within a CAS, bearing in mind that they will be published in Choose and Book at some point.

Where an appointment with a CAS will involve the patient physically attending, then the appointment slots will be fairly easy to define.

Where an appointment with a CAS will (only) involve a telephone conversation, to inform the patient of a decision or to discuss a decision with a patient, then the appointment slot will define 'when the CAS will phone the patient' or 'when the patient will phone the CAS'. The planning and administration for these slots may have unique features.

There is a standard list of naming conventions for services, that has been agreed nationally, and should be used when setting up services. The latest version of this list is available at <http://nww.chooseandbook.nhs.uk/implementation/directory.asp> (in the section titled "Clinic Types").

Where a service is not adequately represented in the list, there is a process for requesting additions or amendments to the list.

See <http://nww.chooseandbook.nhs.uk/implementation/directory.asp> (in the section titled "Adding new clinic types").

The provider organisation and its host PCT should review and agree the service definitions to ensure consistency of terminology and a shared understanding of what the service offers.

4.2. Load the service onto the DoS

A Service Definer (a specific Choose and Book user role) logs onto the Choose and Book application and enters the signed-off information from the DoS Data Gathering template into the DoS.

(See the "Support for Indirectly Bookable Services Storyboard", available at <http://nww.chooseandbook.nhs.uk/technical/future.asp#R2>

Section 2 (Directory of Services) describes, with screen shots, the steps to be taken to enter a Clinical Assessment Service into the Directory of Services.

5. Commission a CAS

Once a CAS is published on the DoS, a PCT can set up Commissioning Rules for that service.

It is possible within Choose and Book to configure Commissioning Rules such that, where the conditions are satisfied such that the CAS would appear on a shortlist, the CAS is the **only** option that shows up on that shortlist. This is acceptable within the Choose and Book policy and is a decision to be made locally.

[In this situation, if a referring clinician does a search on the DoS, they will be able to see all services. At the point where they use Choose and Book to suggest services, only the CAS will be offered.]

Once Commissioning Rules have been set up by the PCT, the DoS will be updated overnight. Once the Start Date for the Commissioning Rule is reached, that CAS will become visible to GPs, and selectable, through the normal operation of Choose and Book.

6. Book into a CAS

When a referring clinician and a patient agree that a referral is appropriate, the referring clinician will use Choose and Book to identify a shortlist of suitable services for the patient.

If a CAS is an appropriate option, it will appear on the shortlist like any other bookable service.

If it has been agreed locally that all referrals of this type should go to a CAS, the CAS is the only option that will appear on the 'shortlist'.

A situation may arise where more than one CAS may be available and appropriate. In this case, the various CASes will appear on the shortlist, as any other services might.

The process for shortlisting services and moving on to booking an appointment is described, with screen shots illustrating how Choose and Book interacts with users, in the storyboard.

(See the "Support for Clinical Assessment Services Storyboard", available at <http://www.chooseandbook.nhs.uk/technical/future.asp#R2>)