



JADE

Bp Premier Bp Comms Consent Guide

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Last updated: October 2019

Intended for usage with Bp Premier version Jade SP1 and later. Some features in this User Manual may be available only in versions later than Jade.

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Understanding Bp Comms Consent

This article explains how to record consent for receiving Bp Comms messages and provides some frequently asked questions about consent and Bp Comms, including for younger patients and searching for consented patients with the database search tool.

With Bp Comms, you can send a variety of reminders and message types to your patients. Four consent options are available in patient demographics to records the message types a patient has consented to receive:

Consent Options

This patient consents to receive the following electronic reminders/messages
(consent settings selected on the Bp Comms configuration screen are enabled)

- ☒ Appointments
 ☒ Clinical Communication (Results & Clinical Messages)
 ☒ Clinical Reminders
 ☐ Health Awareness (Leaflets & Database search)

Each consent type refers to a particular type of message sent from a function in Bp Premier .

Consent type	Description	Bp functions
Appointments	Consent indicates that a patient allows reminders to be sent to them regarding their booked appointments from the Appointment book or by an automated reminder schedule.	<ul style="list-style-type: none"> Reminders sent manually from the appointment book Appointment reminder automated schedules (Setup > Configuration > Bp Service) Bp Comms messages manually sent from appointment book
Clinical Reminders	Consent indicates that a patient allows reminders to be sent to them regarding regular or future clinical appointments, such as reminders for Care Plan reviews, or Immunisations.	<ul style="list-style-type: none"> Reminder mail merges from Reminders and Follow Up Reminders windows

Consent type	Description	Bp functions
Clinical Communication	Consent indicates that a patient allows communications to be sent to them about their investigation results, medication compliance or changes, and other important clinical information or updates.	<ul style="list-style-type: none"> ■ Mail merge from Follow up Inbox ■ Bp Comms manually sent from Inbox and Follow up Inbox ■ Bp Comms manually sent from patient record
Health Awareness	<p>Consent indicates that a patient allows communications to be sent to them about a health issue that may be relevant, or important information about the services your practice provides, such as changes to hours, or new doctors.</p> <p><i>Note: Best Practice Software recommend your practice provide an opt-out option when sending Health Awareness communications.</i></p>	<ul style="list-style-type: none"> ■ Mail merge from Utilities > Database search ■ Send MIMS CMI from the patient record via BHA. ■ Send Patient Education material from the patient record via BHA.

Frequently asked questions

Why is consent important?

Consent options will help ensure your practice:

- Meets obligations under federal and state privacy legislation
- Keeps your patients informed about the type of messages they may receive and when
- Minimises risk to itself and its patients.

Where do I find more information on consent?

The laws and legislations that apply to Bp Comms communications are governed by Privacy Laws.

Privacy Laws means the Privacy Act 1988 (Cth) (including any regulations) and the Australian Privacy Principles, the Spam Act 2003 (Cth) (including any regulations), and any applicable state and territory health records legislation (including any regulations), which may include:

- Health Records and Information Privacy Act 2002 (NSW);
- Health Records Act 2001 (Vic);
- Health Records (Privacy and Access) Act 1997 (ACT);
- Health and Community Services Complaints Act (NT)

Implied and express consent

Two kinds of consent apply to Bp Comms messages types:

- Implied Consent is consent which can be implied as part of a patient-doctor relationship. These are communications that come about as a result of meeting clinical duty of care. Examples within our system are **Clinical Communications**, **Clinical Reminders**, and **Appointment reminders**.
- Express Consent applies when consent cannot be implied for communications with patients. Consent for this kind of communication must be given explicitly, either verbally or in writing. **Health Awareness** communications require express consent.

For more information on types of consent and some guidelines and examples on which practice-patient communications can be inferred to have implied consent, refer to the [Office of the Australian Information Commissioner](#) website. You can [download](#) a guide that has been used as a resource for the information in this article.

How do I contact a patient who has not consented to receive Bp Comms messages?

Patients who have not provided consent to receive SMS messages can still be contacted by phone or letter. If patients included in a mail merge have not consented, Bp Premier will default to a mail merge letter for those patients.

Search for consented patients

To run a query, select **Utilities > Search** from the main menu to open the **Database Search** screen. Copy and paste one of the text snippets below into the **SQL Query** textbox and click **Run query**. Click **Save query** if you want to save the query so that you can run it again any time.

If you have upgraded to Jade or later, the following query returns all patients who have consented to receive SMS messages:

```
SELECT *
FROM BPS_Patients p
INNER JOIN PATIENTCONSENT ON PATIENTCONSENT.INTERNALID = P.INTERNALID and
PATIENTCONSENT.ENROLLED SMS in (1,2)
WHERE StatusText = 'Active'
ORDER BY surname, firstname
```

For instructions on how to save your query results see Searching the database

Can I search for patients aged 16 who may ask for independent consent?

Yes. Best Practice Software provides a number of SQL queries you can run in the Database Search utility to list patients aged 15 and 16.

How is patient consent tied to the phone number that receives messages?

Any new phone numbers must be enrolled to receive Bp Comms messages. Patients can also share a phone number, as in a family. If your practice uses a third-party solution that might update phone number records, updates will be pending until confirmed by a Bp Premier operator.

My practice uses third-party software that might update a patient's consent

From Indigo SP1, third-party solution providers can **no longer** read or update the patient SMS consent record in the Bp Premier database.

Best Practice Software has contacted all known third-party providers regarding this change, and recommend that third-party providers implement a patient consent process within their solution to ensure that patients are consenting to receive information via the solution they supply to your practice.

Do I need to remove consent to receive messages for deceased patients?

Currently, yes. Best Practice Software recommend turning off consent to receive all message types as part of your practice workflow when marking a patient as deceased.

1. In the patient demographic, tick **Deceased** on the right hand side.
2. Click **Bp Comms Consent** to open the **Bp Comms Consent** popup.
3. Untick all **Consent options** on the left hand side.
4. Click **OK**. You will receive a warning prompt informing you that the patient will no longer receive any electronic communications.
5. Click **Yes** and click **Save** back in the patient's demographic window.

Automatic removal of a deceased patient from Bp Comms messages may be included in a future release of Bp Premier.

Consent forms

Do I have to update my existing consent forms?

It is up to the practice, but Best Practice Software recommend you review your current consent forms to ensure the forms contain the following information:

- A statement or link to your practice privacy policy
- An explanation of the different types of communications your practice can send to them
- Indication of express consent of the patient to receive health awareness communications
- The patient's preferred options for contact

- If more than one patient will use the same phone number to receive messages, include indication of consent for this.

The consent must be signed by the patient and attached to their record.

Do you have an example Bp Comms consent form?

You can download an example consent form [here](#). Import this into Bp Premier's word processor and update to suit your practice.

Where do I attach a signed consent form?

In the **Bp Comms** screen from patient demographics, you can scan and import consent forms using the Bulk Document Import tool, and link to the most recent version.

Upgrading to Jade and consent

If you are upgrading from an earlier version to Jade and you are satisfied that you have sufficiently recorded patient consent already, Bp Premier offer a bulk SMS consent update utility for practices upgrading to Bp Comms. This utility will save time in the consenting process for Bp Comms.

The following conditions apply to the Bulk SMS Consents tool:

- The tool is only available for practices who have Bp Premier installed and who have consents previously obtained for SMS **prior** to the Jade upgrade.
- The tool will work on active patients who have a mobile number recorded and for whom Appointment SMS consent has already been enabled.
- Practices will be able to select the types of consents they wish to enable in bulk. As part of the tool, practices will have the option to send a bulk SMS message out to included patients to inform them that they will now receive messages for the practice consents you have enabled.
- Verification of mobile phone number is not available using this tool.
- Practices must return a signed deed poll before Best Practice Software can provide the tool.

How do I obtain the utility?

The tool will not be publicly available. You must submit a signed deed poll and request the tool from Best Practice Software Support.

1. Download the Deed Poll form [here](#).
2. Have your company director sign the deed poll and return the signed document to support@bpsoftware.net.
3. Support will provide a link to download the tool and instructions.
4. Run the utility tool on your Bp Premier server. Follow the steps provided.

Practices should read the Deed Poll thoroughly and carefully consider the contents before signing, returning, and obtaining the tool. Once the tool is run, there is no 'undo' process.

Patient age and consent

Consent must be provided by an individual who has capacity to do so. In the case of minors, the Office of the Australian Information Commissioner (OAIC), the Commonwealth privacy regulator, has expressed a view that minors should be assessed on a case by case basis to determine if they have capacity to provide consent.

However, if such an approach is not practicable or reasonable, individuals aged 15 or over may be presumed to have capacity to consent, unless there is something to suggest otherwise. Best Practice Software consider an appropriate approach is for clinics to seek consent from each minor when the minor turns 16. Prior to that age, Best Practice Software consider practices could seek consent where a minor demonstrates that he or she has capacity to consent (such as where the minor independently seeks medical assistance or treatment).

To assist you in managing consent for older children, the following SQL queries can be run from the Database Search utility to identify patients aged 15 or 16 who may demonstrate the capacity for individual consent.

To run a query, select **Utilities > Search** from the main menu to open the **Database Search** screen. Copy and paste one of the text snippets below into the **SQL Query** textbox and click **Run query**. The results will show the list of patients aged 15 and 16 years. Click **Save query** if you want to save the query so that you can run it again any time.

Consented with shared mobile number

This query returns all patients aged 15 and 16 years of age who have consented to Bp Comms and share a mobile number with at least one other patient.

```
SELECT *  
  
FROM BPS_Patients p  
  
INNER JOIN PATIENTCONSENT ON PATIENTCONSENT.INTERNALID = P.INTERNALID and  
PATIENTCONSENT.ENROLLEDSMS in (1,2)  
  
WHERE StatusText = 'Active'  
  
AND DOB < DateAdd(Year, -15, GetDate())  
  
AND DOB > DateAdd(Year, -17, GetDate())  
  
and (  
  
select count(*)  
  
from bps_patients p1  
  
INNER JOIN PATIENTCONSENT ON PATIENTCONSENT.INTERNALID = P1.INTERNALID and  
PATIENTCONSENT.ENROLLEDSMS in (1,2)  
  
where  
  
p1.internalid != p.internalid
```

```
and p1.MobilePhone = p.MobilePhone  
and p1.statustext = 'active'  
) >= 1  
  
ORDER BY surname, firstname
```

Consented

This query returns all patients aged 15 and 16 years of age who have consented to Bp Comms.

```
SELECT *  
  
FROM BPS_Patients p  
  
INNER JOIN PATIENTCONSENT ON PATIENTCONSENT.INTERNALID = P.INTERNALID and  
PATIENTCONSENT.ENROLLEDSMS in (1,2)  
  
WHERE StatusText = 'Active'  
  
AND DOB < DateAdd(Year, -15, GetDate())  
  
AND DOB > DateAdd(Year, -17, GetDate())  
  
ORDER BY surname, firstname
```

Enrol a phone number for Bp Comms SMS

Patients must have a date of birth recorded and enrol their mobile number before they can receive SMS messages.

Bp Premier offers single-step confirmation on phone number enrolment (patients receive a confirmation message that they've enrolled) or two-step verification (patients must return a validation code to your practice to confirm their mobile number).

Do I have to enforce phone number validation for enrolment?

Phone number validation options are set in **Setup > Configuration > Bp Comms**. Tick **Mobile number verification is required** if you want to your practice to confirm a patient's mobile number by entering a validation code before that number is enrolled in Bp Comms SMS.

What if two or more patients at a practice share the same phone number?

It is possible for multiple patients to receive SMS messages to the same mobile number. When a patient is enabled for SMS, if there are other patients with the same mobile number, a warning prompt will appear showing the other patients and whether they are enabled to receive messages.

Best Practice Software recommend that, if patients wish to share a mobile phone number (for example, a family), your practice use a manual hard-copy method of recording such 'joint' consent, and attach the document to the patient's clinical record.

My practice uses third-party software that might update a patient's phone number

If your practice uses third-party software that updates the Bp Premier database, changing a patient's phone number will affect their enrolment in Bp Comms SMS.

If a patient's enrolled phone number is changed outside of Bp Premier, the new phone is stored as 'pending' and the old phone number is retained until approval. The first time a user opens a window in Bp Premier from which the patient's demographics can be updated (such as various appointment book, billing history, or account screens), Bp Premier will alert the user that the patient's number has been changed outside of Bp Premier and prompt the user to accept or reject the change.

If the user accepts the change, your practice's confirmation or validation preference (one-step or two-step) for accepting SMS enrolments will apply.

Bp Premier has contacted all known Third-Party Providers regarding this change, and recommended that third-party providers accommodate this change by informing patients that their mobile number will not be updated at your practice until they attend for their appointment and confirm the change of mobile number.

Note: *This change only applies to 'updating' and not recording mobile numbers for new patients or where a mobile number did not previously exist.*

Bp Comms Consent

You must enrol a patient's mobile phone number and record their consent before they can receive Bp Comms messages from your practice. If you have previously obtained Bp Comms consent for SMS, the same consent can be used for Best Health App enrolment.

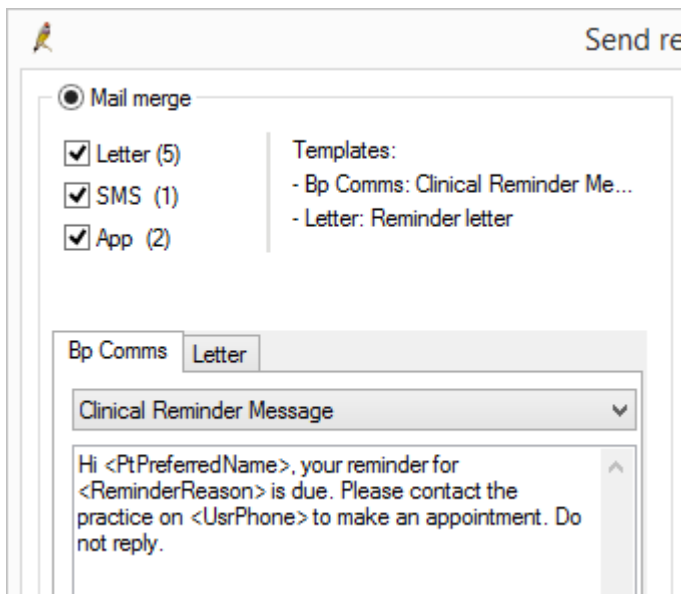
Because Bp Comms allows you to send more than just appointment reminders, Best Practice Software recommend that your practice review its consent process and determine any changes that may be required.

How does Bp Premier handle consent when I run a mail merge?

When you run a bulk message sendout like clinical or appointment reminders, Bp Comms will default the message method for each patient based on:

- what the patient has consented to receive (set in demographics)
- the practice's preferred method (set in Configuration > Bp Comms).

After you select your schedule criteria, Bp Comms will show the breakdown of how many patients will receive messages of each type (for example 5 letters, 1 SMS and 2 App messages).



Send re

☒ Mail merge

☒ Letter (5) Templates:

☒ SMS (1) - Bp Comms: Clinical Reminder Me...

☒ App (2) - Letter: Reminder letter

Bp Comms Letter


Clinical Reminder Message

Hi <PtPreferredName>, your reminder for <ReminderReason> is due. Please contact the practice on <UsrPhone> to make an appointment. Do not reply.

Record patient consent and enrol in Bp Comms

1. Search for the patient using any of the patient search methods: **File > Open Patient**, **View > Patient**, or press **F2**.
2. Click **View details** to open the **Patient details** screen.


3. If the patient does not have a **Mobile Phone** number recorded, you must record a valid number before you can click **Bp Comms Consent**. Mobile numbers should start with a 0 and **not** include the country code prefix.

 Edit patient

Title:	Mrs		
Family name:	Aalbrecht		
Given name:	Kathleen		
Middle name:			
Preferred name:	Kathleen		
Date of Birth:	<input checked="" type="checkbox"/> 7/07/1965	Age:	53 yrs
Sex:	Female		
Ethnicity:			
Address Line 1:	707 Menner Cl		
Address Line 2:			
City/Suburb:	Darwin	Postcode:	0800
Postal Address:			
City/Suburb:		Postcode:	
Home phone:		Work phone:	
Mobile phone:	0452404111	Contact via:	
Consents to:			
E-mail:			

4. Click **Bp Comms Consent** on the right-hand side of the screen.

×



No photo

General notes:

Appointment notes:

Contact Notes

Bp Comms Consent


SMS: Not Enabled

☐ Registered for CTG PBS Co-payment relief

☐ Inactive ☐ Deceased

5. The **Bp Comms Consent** window will appear.

Set consent


Bp Comms Consent - Kathleen Aalbrecht
×

Consent Options

This patient consents to receive the following electronic reminders/messages (consent settings selected on the Bp Comms configuration screen are enabled)

☒ Appointments

☐ Clinical Communication (Results & Clinical messages)

☒ Clinical Reminders

☐ Health Awareness (Leaflets & Database search)

Select All

Deselect All

Signed consent status: Not Linked

Import and link the signed patient consent form using the buttons below

Open Bulk Document Import

Link to signed consent

Consent Status

Mobile Phone: 0452404111

SMS: Not Enabled

This patient cannot receive reminders/messages via SMS.

Verify

Disable

Best Health App: Not Enrolled (patients need to enrol at each location)

(Active) Main surgery ▼

The patient cannot receive reminders/messages via the App from this location.

Enrol

Cancel

OK

6. Under **Consent Options**, tick the Bp Comms message types that the patient consents to receive. Ticking a message type will enable other buttons in this window.
7. If you need to store a signed consent form for the patient, click **Open Bulk Document Import** to scan and import the signed consent form into Bp Premier.

***Note:** A user will need permission to access the Bulk Document Import tool.*

8. Click **Link to signed consent**. The **Select signed consent** window will appear.

Date	From	Category	Subject
<input checked="" type="checkbox"/> 03/10/2018		Patient Consent	
<input type="checkbox"/> 03/10/2018		Letter	

9. Tick the form you want to link to as the most recent and correct consent and click **Select** to return to the **Bp Comms Consent** window.

Enrol in SMS

1. Under **Consent Status**, you can change the Mobile Phone number.

The number must be in the Australian format of '0400 000 000' (with or without spaces). The number must not have a '+' or '61' prefix. Incorrectly formatted numbers will be rejected by the message provider service and will not be delivered.

2. Click **Enable** to verify the patient's mobile number. The action required by the patient will depend on your Consent/Enrolment settings in **Setup > Configuration**:
 - If **Send patient SMS when enabling** and **Mobile number verification is required** are both unticked, the patient receives no enrolment message, no patient action is required, and SMS enrolment is complete.
 - If **Send patient SMS when enabling** is ticked, the patient will receive an enrolment SMS message but no further action is required. SMS enrolment is complete.
 - If **Mobile number verification is required** is ticked, the **Verification Required** window will appear, summarising the patient's Bp Comms consent. Click **Send** to send a validation code to the patient's mobile phone, and enter the code into the box that appears. Bp Premier will validate the code and SMS enrolment is complete.

***Note:** Best Practice Software recommend mobile number verification to ensure that the intended patient receives messages from your practice.*

Consent Status

Mobile Phone:

SMS: Awaiting Verification

Enter the verification code received by the patient:

3. Click **Save**.

Enrol in Best Health App

1. Open the Bp Comms Consent window via patient demographics > **Bp Comms Consent**
2. In the **Best Health App** drop-down list, select the location where the patient is enrolling. Click the **Enrol** button. The **Enrol** button becomes active when at least one **Consent Option** is chosen.

If the patient attends more than one of your locations and you want to enable them to use the Best Health App at those locations, you must enrol them using the above procedure but change the location selected in the **Best Health App** drop-down list.

Inside the Best Health App, the patient can filter messages, health summaries and other information by the location it was received.

Bp Comms Consent - Kathleen Aalbrecht

Consent Options
This patient consents to receive the following electronic reminders/messages (consent settings selected on the Bp Comms configuration screen are enabled)

☒ Appointments ☐ Clinical Communication (Results & Clinical messages)
☒ Clinical Reminders ☐ Health Awareness (Leaflets & Database search)

Select All Deselect All

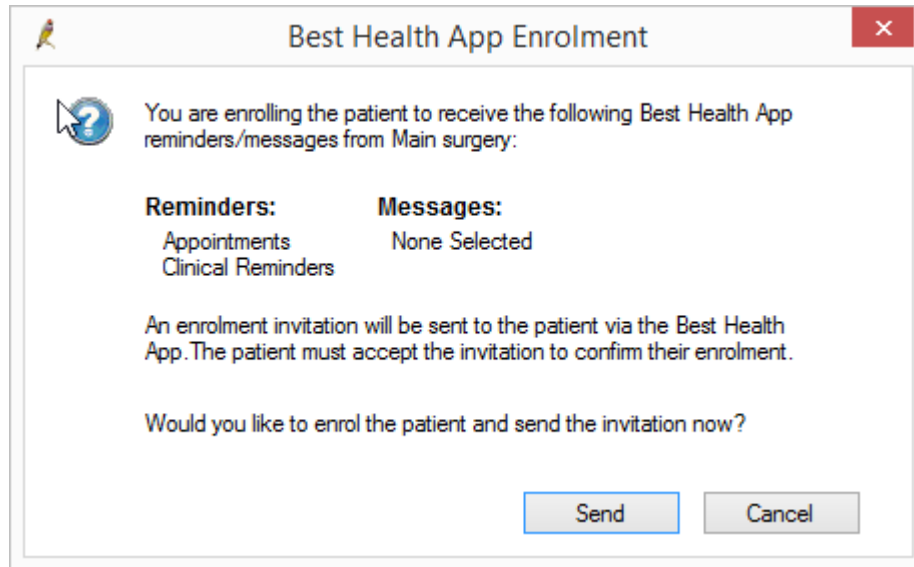
Signed consent status: Not Linked
 Import and link the signed patient consent form using the buttons below
 Open Bulk Document Import Link to signed consent

Consent Status
 Mobile Phone: 0452404111
SMS: Not Enabled
 This patient cannot receive reminders/messages via SMS.
 Verify Disable

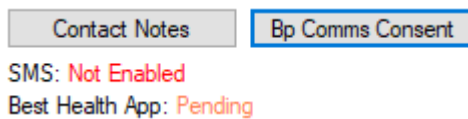
Best Health App: Not Enrolled (patients need to enrol at each location)
 (Active) Main surgery
 The patient cannot receive reminders/messages via the App from this location.
 Enrol Cancel

OK

3. A confirmation message displaying the chosen consent options is shown. Ensure the correct options are selected and click **Send**.



4. The **Best Health App** status in the patient demographics window displays 'Pending' after the invitation is sent.



5. The patient will receive an invitation to use the app including a link to download it from the appropriate store. Once downloaded they create their account, using the same mobile number as is recorded in Bp Premier. There will be a new Invitation to enrol message in their App Inbox which needs to be accepted.
6. When the patient has accepted the invitation to enrol, the status will change to 'Enrolled'. The change of state from 'Pending' to 'Enrolled' may take a few minutes to appear after the patient has accepted the invitation.

