



Standard Operating Procedure for Digital Initial Pregnancy Self-Referral Pathway

INITIATED BY: Cwm Taf Morgannwg University Health Board
Obstetrics, Gynaecology and Integrated Sexual
Health Directorate

APPROVED BY: Service Wide Assurance Group

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Legislative or operational changes required

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FREEDOM OF INFORMATION STATUS: Open

1. Introduction and Background

Performance data shows that the number of women and pregnant people whose initial booking appointment with Cwm Taf Morgannwg (CTM) Maternity Services that has been undertaken by 10 weeks' gestation has been steadily decreasing for the past 2 years. Experience data collected also demonstrates there is a significant delay between the date that a woman/ person reports their pregnancy and the initial booking date. This can vary between 0- 6 weeks, with an average of 2.5 weeks (correct at June 2023).

Welsh Government set a target that 85% of initial booking appointments should be completed by 10 week's gestation, so that there can be timely access to early pregnancy information and support, and so that screening appointments can be offered within the optimal timeframe. Compliance with this target has not been achieved since December 2020 as a Health Board (correct at the time of writing). Additionally, the Maternity Quality Improvement Plan (MQIP) identified initial booking by 10 weeks gestation as a priority for improvement.

This Standard Operating Procedure (SOP) applies to any health care professional that will be involved in any part of the process of arranging and/ or completing an initial pregnancy booking appointment for women and pregnant people within the CTM Maternity Service. This includes from first accessing the referral system in Microsoft O365 up to and including the initial booking appointment.

CTM have made an agreement with Cardiff and Vale UHB to utilise the digital booking system developed by their Digital Lead Midwife to implement in CTM. This will remove the variation that currently exists between the community areas, not only in the initial booking process, but in the early pregnancy information women and pregnant people will receive at the first point of access to Maternity Services. This has been standardised and digitised as part of the preparation for launching the digital booking system.

Process mapping also revealed significant variation in the booking pathway across all CTM's community areas, as well as a difference in the operational definition of the booking date. As a part of wider improvements to the booking process, CTM are moving to having a single booking pathway across all community areas. This SOP will ensure that all women and pregnant people are provided with early pregnancy information and access to an initial booking appointment using a standardised approach across the Health Board.

2. Operational Definitions

The first point of contact with healthcare services will be defined as the point at which the woman/ pregnant person reports to their GP practice or accesses the digital booking referral form directly from a device, such as a mobile telephone, tablet or laptop.

The referral date will be taken as the date the digital referral is made and received. Due to the instantaneous nature of the system, this will always be the

same date. This may vary only if the previous paper-based system has to be reinstated, such as in the event of a cyber-outage. In this case, the referral date will be recorded as the date documented on the paper self-referral form.

The initial booking appointment is defined as the appointment at which a midwife completes the Maternity Handheld record, along with the woman/ pregnant person, and provides pregnancy information, including screening options and healthy lifestyle advice. The expectation is that this appointment will take place in the woman/ person's home. Telephone or virtual appointments may be offered in certain, specific circumstances, the reasons for which should be clearly documented.

3. Self-Referral access

The initial digital self-referral form can be accessed by women and pregnant people in one of two ways:

- 1) The woman/ pregnant person reports to a healthcare professional that they are pregnant, at which time they will be directed to access the digital booking self-referral form via a Quick Response (QR) code.
- 2) The woman/ pregnant person uses a search engine and enters 'Cwm Taf Morgannwg Pregnancy Booking'. The first result that appears will be a direct link to the digital booking form.

Both of the above access routes will be communicated to the community CTM serves via the existing channels, including social media and posters in GP surgeries. Posters displaying information on how to self-refer to maternity services can also be displayed in community spaces such as pharmacies and family planning clinics.

The new processes will also be communicated to Primary Care colleagues via the community midwifery teams who work within the GP surgeries. Additionally, resources have been shared with Gynaecology and Integrated sexual health leads.

4. The self-referral booking process

This is one, single booking pathway for the whole Health Board. This pathway will replace all other previous pathways that have existed prior to full implementation of the digital referral process.

Woman/ pregnant person accesses CTM maternity website via internet search, link or QR code and submits details via booking form (demographics, LMP etc.)



At point of access, the woman/ pregnant person receives link to early pregnancy information, including public health advice and when to expect contact from the maternity service. A pop up will appear confirming booking submitted.



Woman/ pregnant person receives an email confirming their self-referral has been safely received and early pregnancy information provided again, including central number to call for advice/ queries prior to booking appointment. This includes information on optimal timing of the booking appointment.



Clerical support accesses O365 booking system and registers pregnancy on Myrddin/ WPAS (according to site). Dating scan/Screening appointment made.



Clerical support prepares maternity notes, including addressographs, forms etc. and sends to relevant clinical area (on site or via HB transport) for midwives to complete booking



Midwife accesses booking system, identifies new bookings and phones woman/ pregnant person to make initial booking appointment, at home wherever possible. Handheld notes are ready to be completed.



Home booking appointment completed by community midwife. Dating scan appointment given, if consented to by the woman/ pregnant person.



Letter sent to service user confirming date and time of scan/ screening appointment



Scan and screening appointment completed, if consented to by the woman/ pregnant person.

NB. Further antenatal appointments will be offered in accordance with NICE guidance. Further scan appointments will be recommended in line with Perinatal Institute guidelines.

5. Training for midwives and maternity support staff

Any staff who may have to access and utilise the digital booking system will be required to undertake training. A training video has been developed for this purpose, and is available via a Teams based link. The training takes approximately 10 minutes. Staff will have the opportunity to navigate and familiarise themselves with the system prior to launch. Any new staff will be expected to complete the training as a part of their induction in to the community. Drop in sessions have also been organised to provide a forum for anyone using the system to asks questions about its use.

6. Monitoring arrangements

Early referral creates an opportunity to provide important public health information to women at an early stage of pregnancy. When an early pregnancy referral is received, there should not be a delay in arranging the booking appointment, which should be made as soon as practically possible and convenient for the woman. Community team leaders will be responsible for monitoring the SharePoint booking site on a weekly basis. Where the community lead is on leave, a deputy should be nominated to assume responsibility in their absence. The system should be reviewed for:

- Any booking that has been on the system for > 7 days that has not had a booking appointment made by a community midwife. This can be filtered down with 2 clicks. An exception to this is if in the notes section, the reason for delay in making a booking appointment has been clearly documented by a community midwife. An example of this may be that they have made contact with the woman who is awaiting an EPU appointment. Arrangements for contacting the woman following the appointment should also be clearly documented.
- Any booking where there is an interval between self-referral and arranged booking appointment of > 2 weeks. If an appointment has been made, but

it is for more than 2 weeks after the referral was received, the reason for this should be documented in the notes section. An example of this may be that the woman is on holiday and unable to attend an earlier appointment.

In the event of either of the above being identified, the team leader should contact the responsible midwife to ascertain what the barriers to making a timely booking appointment are.

7. Risks, Issues and Mitigations

Risk or Issue	Mitigation
Invalidated clinical information provided through self-referral and O365 forms	On receipt of self-referral, identifiers checked and confirmed during initial telephone contact with woman/ pregnant person. If unable to contact due to input error, details checked against WPAS. Clinical information only entered on to record once validated by woman/ person.
PII and clinically sensitive data held within O365 environment	Data will be validated and entered into maternity hand held records and MITS system. Once initial booking appointment is made, PII and clinical data to be deleted from O365 system to minimise opportunity for corruption.
Digital exclusion	Information to GP's and community on how to refer. GP surgery or community midwife may help the woman/ person to complete the online form if no access to a phone or other device.
Error in Data entry	If telephone number has been input incorrectly, this can be checked via existing systems such as WPAS. A visit to the home can be arranged in the event of being unable to contact the woman/ person. This is less of a risk than the current paper-based system, as fields are mandatory.
Communication with GP	A SIP is completed for each pregnancy, a copy of which is provided to the GP.
Different models of referral during test phase.	During the short test phase, if a digital self-referral is received from a woman/ person outside of the test area, this will be received and actioned as per usual process.

The digital self-referral system has been operational in Cardiff and Vale for over a year, with no patient safety incidents or system breaches reported. This provides reassurance that the above risks are unlikely to become issues in CTM.

The digital booking pathway has a risk and issues log which will be reviewed monthly by the Senior Midwives for Community. The Senior Midwives for Community will also be responsible for oversight of the digital booking system, including ensuring all self-referrals are accessed within the appropriate timeframes.

Key Monthly Metrics

Compliance against booking by 10 weeks as a % of all bookings. Monthly. Data source: QlikSense. This can be broken down by community team to identify areas that may need additional support with implementation.

PREMS: experience of early pregnancy care and access.

Number of booking that have not been reviewed by a midwife >7 days following self-referral.

Number of booking appointments made for a date > 14 days after date of self-referral.

Appendix One: Poster for Primary Care

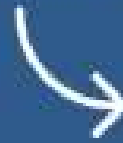
How to refer a new pregnancy to Cwm Taf Morgannwg UHB

Advice for primary care



If the surgery is contacted by telephone, please advise families wishing to register a new pregnancy to enter 'Cwm Taf Morgannwg Maternity Services' into a search engine where they will find the link to the booking form

In person, scan the QR code



 PREGNANT



GIG
Cwm Taf
NHS
Wales

Bwrdd Iechyd Prifysgol
Cwm Taf Morgannwg
University Health Board

Appendix Two: Poster for Public Places

Belchiog Pregnant

Ydych chi newydd feichiog?
Oeddech chi'n gwybod y gallwch chi gysylltu â bydwraig yn uniongyrchol?

Are you newly pregnant?
Did you know you can contact a midwife directly?

Nid oes angen i chi ymweld â'ch meddygfa i gael mynediad at ofal mamolaeth.

You do not need to visit your GP surgery to access maternity care.

Sut ydych chi'n atgyfeirio eich hun ar gyfer gofal mamolaeth:

How do you refer yourself for maternity care:

1. Defnyddwch eich ffôn smart i sganio'r cod QR
2. Cwblhewch eich manylion ar y ffurflen archebu
3. Byddwch yn derbyn e-bost i gadarnhau bod eich ffurflen wedi'i derbyn yn ddiogel
4. O fewn 1-2 wythnos, bydd bydwraig gymunedol yn gysylltu â chi i drefnu apwyntiad

1. Use your smart phone to scan the QR code
2. Complete your details on the booking form
3. You will receive an email to confirm your form has been safely received
4. Within 1-2 weeks a community midwife will contact you to arrange your booking appointment

Sganio cod QR
Scan QR code

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