



# Quick Reference to Summary Care Record (SCR)

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## What is the Summary Care Record?

The Summary Care Record (SCR) is an electronic patient record held on the Spine that, depending on patient consent, can be accessed by other healthcare professionals outside of your practice. This is compiled by means of a one-off **Initial Upload** which sends allergy and medication data for non-dissenting patients from your practice to the Spine. This information is kept up-to-date on the Spine as you enter the patient record in Vision. You are also able to add clinical Supplementary data to the SCR from Consultation Manager as long as express consent is obtained and recorded.

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## What happens after the Initial Upload?

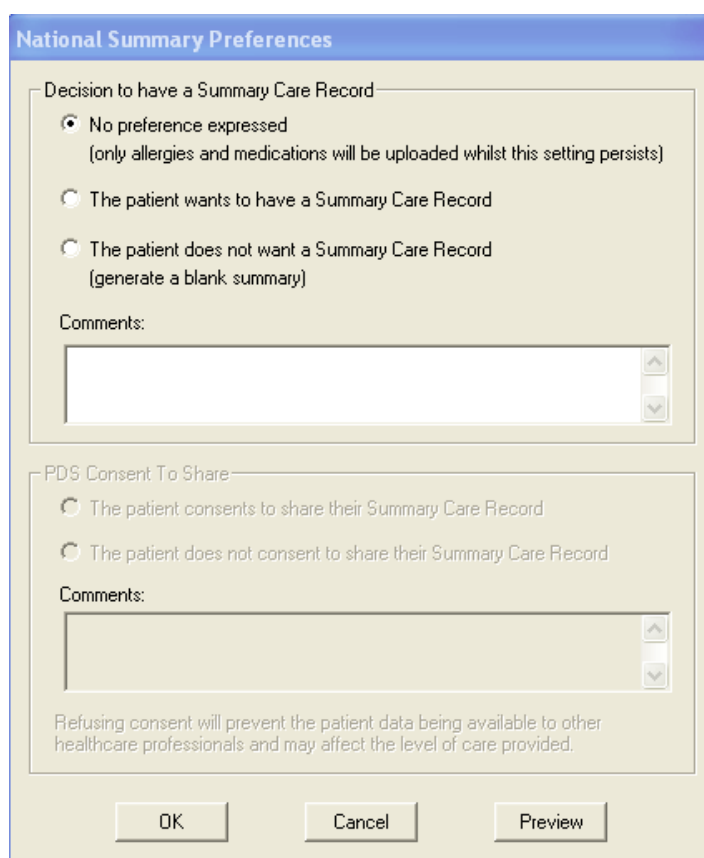
As there might be a certain period of time between the Initial Upload and your SCR training, you need to know how to deal with the **Patient Preference** screen. You can either:

- Record Patient Preference actively, which can be accessed either from **Patient details – Preferences - Change** (you will need have an open face-to-face consultation or else the Change icon will be inactive) or from the **Preferences** icon on the National Summary form itself.
- Or, you can set the Patient Preferences screen to appear for patients who have not previously had a Preference recorded when you start or close a consultation.

If express consent is recorded, you can maintain the SCR with Supplementary Data as required and update the Spine with the changes. You can also set up Consultation Manager so that the SCR is automatically updated with Supplementary information. This is done through Management Options. See page 6.

## Recording Patient Preference

There are three main options with regards to having a Summary Care Record:



*National Summary Preference*

**No preference expressed** is selected automatically if patient preference has not yet been recorded/decided. For patients with no preference expressed, an Initial Summary is sent to the Spine as part of the Initial Upload because consent for this is implied. The Summary only contains medication and allergy records (known as critical data). Next time you access the patient record in a face-to-face consultation, you will be prompted to record express consent.

**The patient wants to have a Summary Care Record** – With this option selected, when the initial upload is run, a summary consisting of critical data is sent to the Spine. **You can also choose to add Supplementary data to the SCR before or after the initial upload if this option is recorded.** A Read code of **93C2 Consent given for upload to national shared electronic record** is added to the patient's record.



**The patient does not want a Summary Care Record** – With this option selected, when the Initial Upload is run, a blank summary is sent to the Spine which states that the patient did not want to have an SCR. If the patient changes their mind, an SCR can be subsequently compiled and stored. A Read code of **93C3 Refused consent for upload to national shared electronic record** is added to the patient's record. **You can still have a local summary for the patient with this option selected.**

**Comments** can also be added which are stored as free text. Note that if there are existing comments, then changing the preference will clear the previous comments.

You can also add the consent Read codes directly to the patient record in Consultation Manager. (**93C2 Consent given for upload to national shared electronic record** and **93C3 Refused consent for upload to national shared electronic record**).

### PDS Consent to Share

Due to the revised consent model from NHS CfH, the PDS consent to share option is no longer relevant to the SCR scheme. Patients either opt to have an SCR on the Spine or not, at each unscheduled encounter patients are explicitly asked for permission to view their SCR.

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## How do I manage the SCR?

### How do I view the SCR?

As patients are selected, the Initial Summary will be replaced with a verified structured SCR, triggered by a consultation being started. You might only want to update the patient's Critical Data which is done automatically, or if you wish to do so, you and the patient can discuss and add any Supplementary Data to the Summary. At the moment only Critical Data is being stored on the Spine.

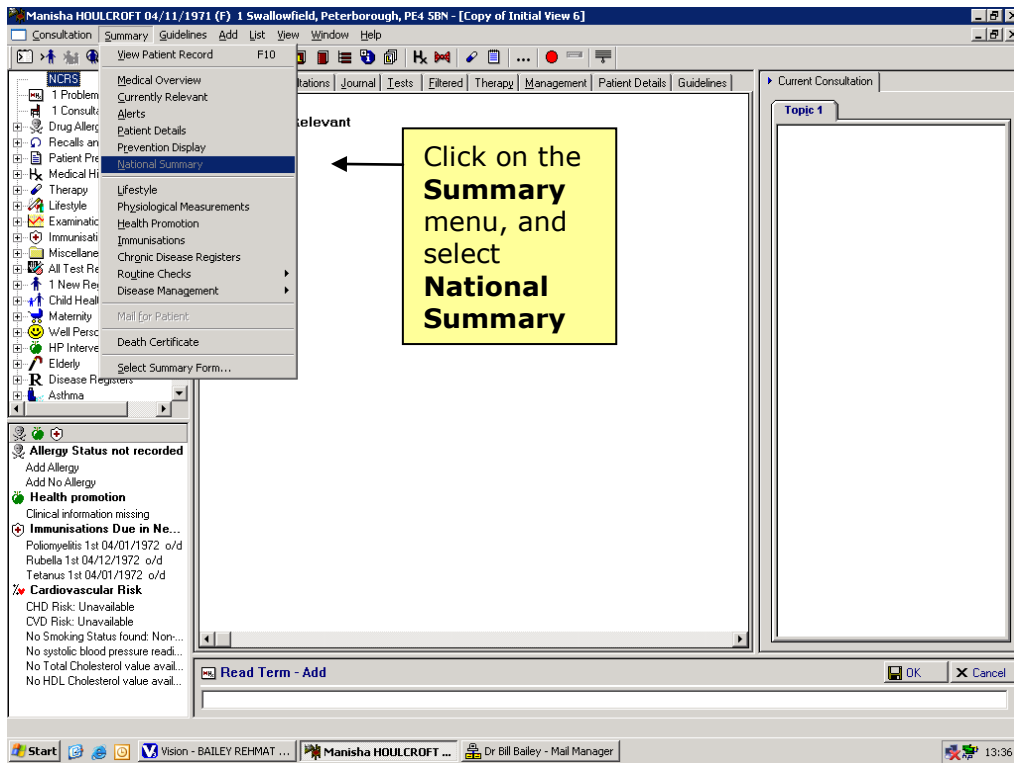
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**Note** - To add Supplementary Data you must have an open face-to-face consultation. The full National Summary User Guide gives a list of face-to-face consultations.

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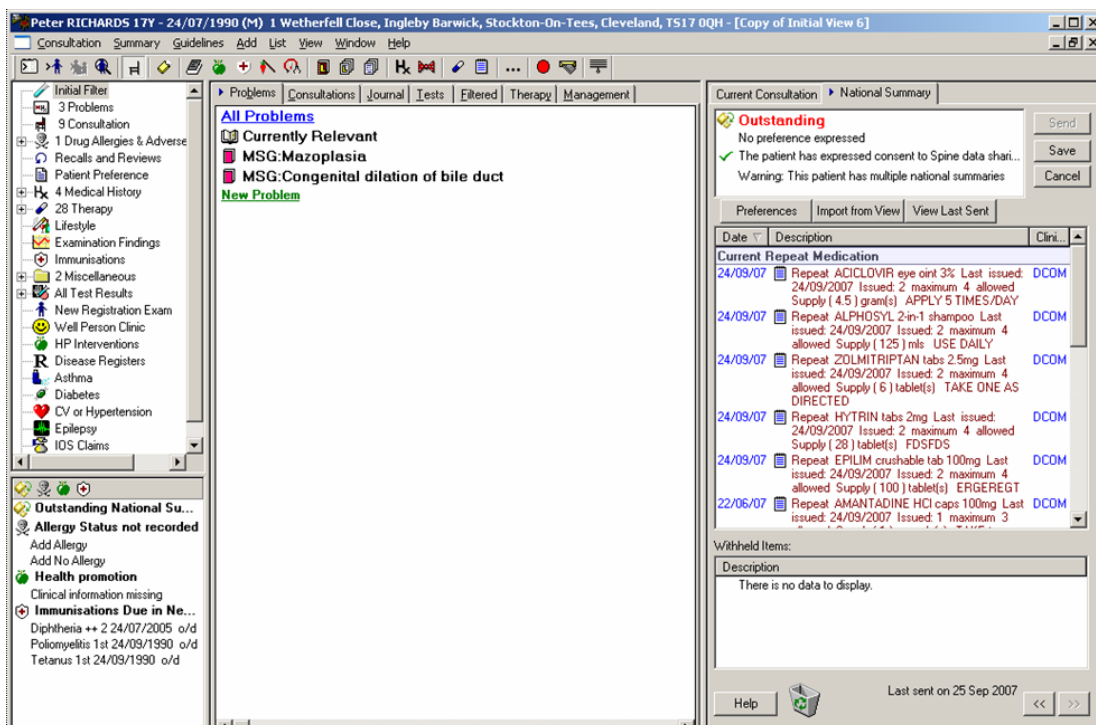
To view the SCR for a patient:

1. In Consultation Manager, click on the **Summary** menu.
2. Select **National Summary**.



**Note** - The National Summary option is inactive if the selected patient has not had an acknowledged Initial Summary in Mail Manager.

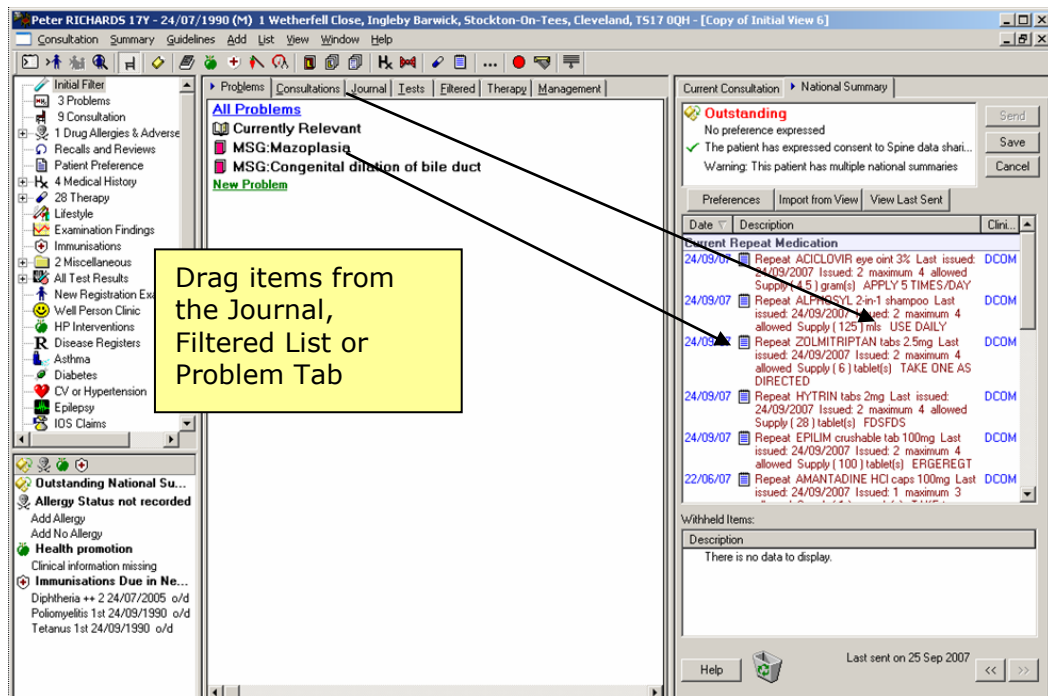
The National Summary screen appears as a tab on the Consultation Pane.





## How do I Add Data to the SCR?

You can add data to the SCR by dragging an entry from the Problem Tab or Filtered List and dropping it onto the National Summary pane. Critical Data will be automatically updated as the patient is selected and requires no user intervention.



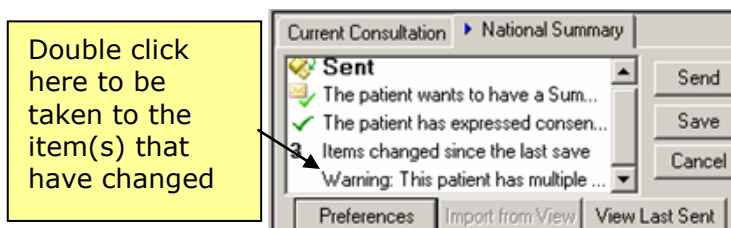
## How do I add more than one item to the SCR?

To select more than one item to be included in the SCR:

1. Hold down the **Control** key.
2. Click on the required items from the **Problems** Tab or **Filtered** list.
3. Drag the mouse over to the **National Summary Pane**.
4. Drop the items on the **Items Included Pane**.

## Which Items have changed since the last save

If new data was added to the patient record since the last summary was sent, you will be prompted from the National Summary tab: e.g., *2 Items changed since the last save.*

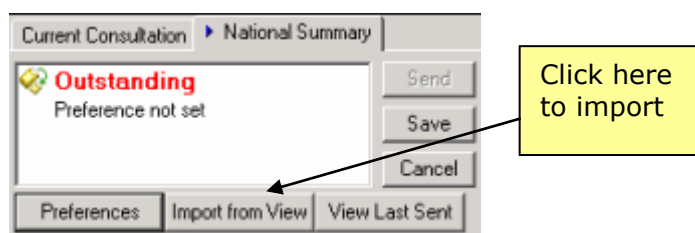


Double click on the prompt to be taken to a filtered view of the item(s) that have changed. If required, you will then be able to multi-select these items and drag them to the summary.

## How can I import data from a filtered list to the SCR

The **Import From View** button on the National Summary tab will import all the items that you have on display from either the Journal or Filtered tab which have been added since the last Summary was sent. This is a quick way of updating the SCR.

You can first create a filtered list, for example, by clicking to highlight a Category on the navigation pane, such as Lifestyle. Then click on **Import from View**.

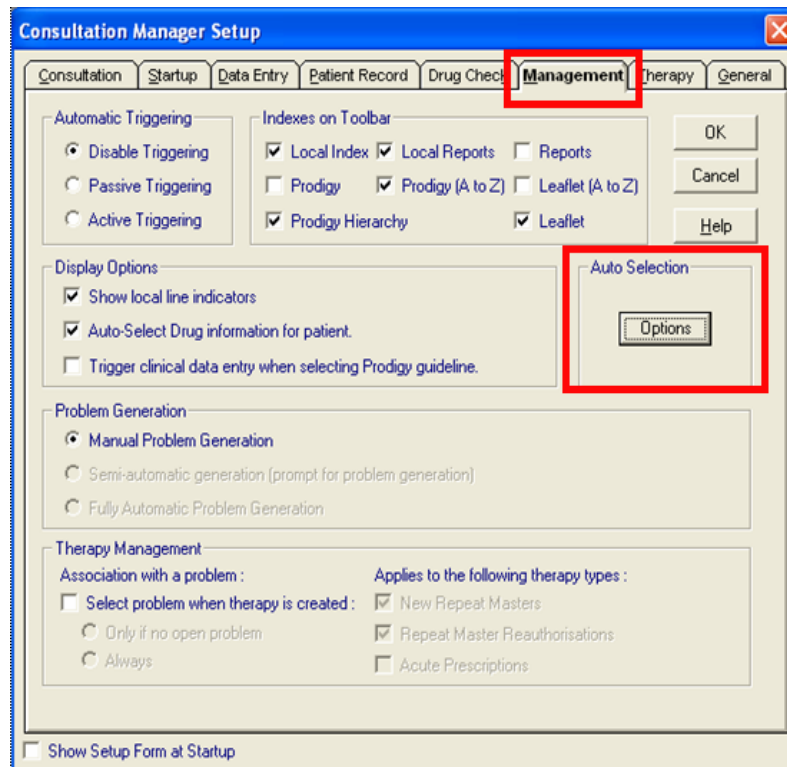


## How do I set up automatic population of the SCR?


Management Options is a practice wide setting which allows you to pre-define what is included in the National Summary.

**Note** Please ensure that you are not in an open consultation whilst defining the Management Options.

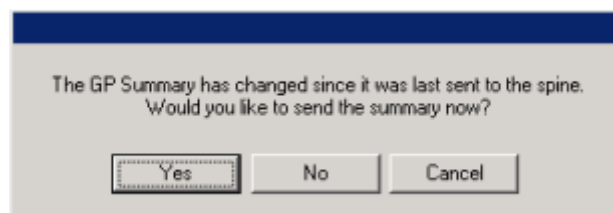
1. In **Consultation Manager**, click on the **Consultation** menu, select **Options - Setup**. Select on the **Management** tab and click on the **Options** button under Auto Selection.



## How do I send the SCR?

When you have finished compiling the SCR with Supplementary Data, you can click the  Send button and the SCR will be sent through Mail Manager and on to the Spine.

If you do not click on Send after updating the SCR with Supplementary data, you will be prompted with the following screen when you close a face to face consultation: *The GP Summary has changed since it was last sent to the spine. Would you like to send the summary now?*



**Yes** sends the summary. You will be prompted to record Patient Preference if it has not yet been recorded.

**No** does not send the summary and leaves the status as *Outstanding*. If this is the first patient contact since the Initial Upload, the **No** option is inactive. You must either send the summary or return to the consultation.

**Cancel** takes you back to the Consultation Screen