

# Summary Care Record Changes

DLM 380



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<b>Date</b>	<b>Version</b>	<b>Contents</b>	<b>Output</b>
07/09/2011	001	Draft - ESTU	.DOCX
27/09/2011	001	Review RMID	DOCx
05/10/2011	001	Review CFH	DOCX
10/11/2011	002	Change wording for Reason for medication	PDF
16/11/2011	003	PSIS Initial summary rejection, Spine services disabled for Identity Confirmed	PDF

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# Summary Care Record Changes for DLM 380

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## What's New

Following a government review of the Summary Care Record (SCR) and in accordance with requirements from Connecting for Health, we have implemented some changes to the SCR functionality. The changes mainly relate to the process by which patients express their preference, the content management of the SCR and some software enhancements:

- **SCR PDS Synchronisation** – During the Initial Upload and after deferring a PDS mismatch in Consultation Manager, an SCR PDS synchronisation is now run. NHS number, gender, DOB and, surname in addition to either forename or postcode must be synchronised as a minimum for an initial summary to be uploaded or to access the SCR via Consultation Manager. **No other Spine services are available.** See “SCR PDS Synchronisation” on page 3.
- **Changes to Patient Consent Preference–**
  - **Change to Consent Preference Read Codes** - The Patient Preferences screen has been updated to reflect the new patient consent codes. There are now two forms of Express consent: one for the express consent of medication, allergies and adverse reactions only and one for express consent for medication, allergies adverse reactions and additional information. **For existing SCR users, the old consent preference Read codes will not be automatically replaced with the new ones and will function as previously intended. However, you are advised to start using the new codes for all future data input.**  
See “New SCR Consent Preference Read Codes” on page 4.
  - **New Warning when Changing Consent Preference Read Codes** – When adding, editing or deleting a patient consent preference or corresponding Read code via medical history, the following warning message is displayed:  
*“You are about to change the patient’s Summary Care Record consent preference. You should be sure that the patient understands the implications of their choice before changing it”.*
  - **New History Screen** – From DLM 380, there is a new History button on the Patient Consent Preference screen. This lists all previously recorded consent preferences and allows you to access a full audit trail. See “New History Button” on page 6.

- **National Summary Tab Changes**

- **Reason for Medication** – From DLM 380, for Problem headers to be included in the SCR, the patient must have a consent preference of **9Ndn.00 Express Consent for Core and Additional Summary Care Record Data Set Upload** recorded. See “Reason for Medication” on page 7.
- **New Warnings when sending a National Summary** – The send button on the National Summary tab is now constantly available to allow you to easily resend summaries. Because of this, and as you can maintain the SCR for local practice as well as national purposes, if a patient has supplementary data on their SCR but has only a preference recorded for critical data (medication and allergies), it is now confirmed on send that

*“The patient has chosen only to have medication and allergies in SCR and therefore any supplementary data will not be sent”.*

Likewise if the patient has chosen not to have an SCR at all and you are maintaining a local summary, you are warned that

*“The patient has chosen not to have an SCR and therefore a blank summary will be sent”*

See “National Summary Tab Changes” on page 7.

- **PDS Checks** –After deferring a PDS mismatch in Consultation Manager, an SCR PDS synchronisation is now run.. NHS number, gender, DOB and, surname in addition to either forename or postcode must be synchronised as a minimum for an initial summary to be uploaded. This means that you can access the SCR for a patient matching a curtailed PDS criteria. When this happens, Identity Confirmed is displayed in the patient title bar and you are only able to access national services for this patient with regards to SCR. See “SCR PDS Synchronisation” on page 3.

- **Clinical Audit Search** – There are new Clinical Audit searches to help you identify patients with an outstanding SCR that has not been sent and track SCR consent preference codes used. You can save the results of this audit to a group and use Next Group Patient option in Consultation Manager to go through each patient and send the summary. See “Clinical Audit for Outstanding SCRs” on page 8.

- **SCR Functionality Removal**

- **Warn If No Patient Preference** - It is a new Connecting for Health requirement that practices should not be warned if the patient does not have a preference recorded. We have therefore removed this option from Consultation – Options Setup in Consultation Manager. See “Warn If No Patient Preference” on page 10.
- **National Summary Auto Selection Options** – It is also a new Connecting for Health requirement that supplementary data is only manually added to the SCR, hence the auto-selection option for SCR has been removed from Consultation – Options – Setup in Consultation Manager (NB it still remains for Choose and Book). This is also no longer accessible from any of the National Summary right click menus. See “Auto Selection Options for SCR” on page 11.

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## SCR PDS Synchronisation

During the Initial Upload and if you have chosen to Defer a PDS mismatch screen at the time of opening a new patient record, a new SCR PDS synchronisation is now run automatically. The following criteria must be synchronised in order to upload the current SCR:

NHS number		Forename
Gender	+	OR
DOB		Postcode
Surname		

Where a SCR PDS synchronisation only has been successfully run , “Identity Confirmed” is displayed in the patient title bar in Consultation Manager. You are only able to access national services for SCR functionality. **No other Spine services for the patient are available, eg you will not be able to do a Choose and Book referral.**

**London, SW8 3JE- (IDENTITY CONFIRMED)**

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This is a CFH requirement and you are advised to match all PDS data where possible.

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Points to note:

- If PDS and Vision data have corresponding blanks for non-mandatory demographic information (ie other than the above), the PDS synchronisation is regarded as matched.
- If the patient demographic data is not successfully SCR PDS synchronised, the SCR initial upload for the patient is skipped and from Consultation Manager, the SCR on the Spine is not accessible.
- You are still able to remove your Smartcard whilst the initial upload is running. Any PDS mismatches are not displayed on the screen during this time.

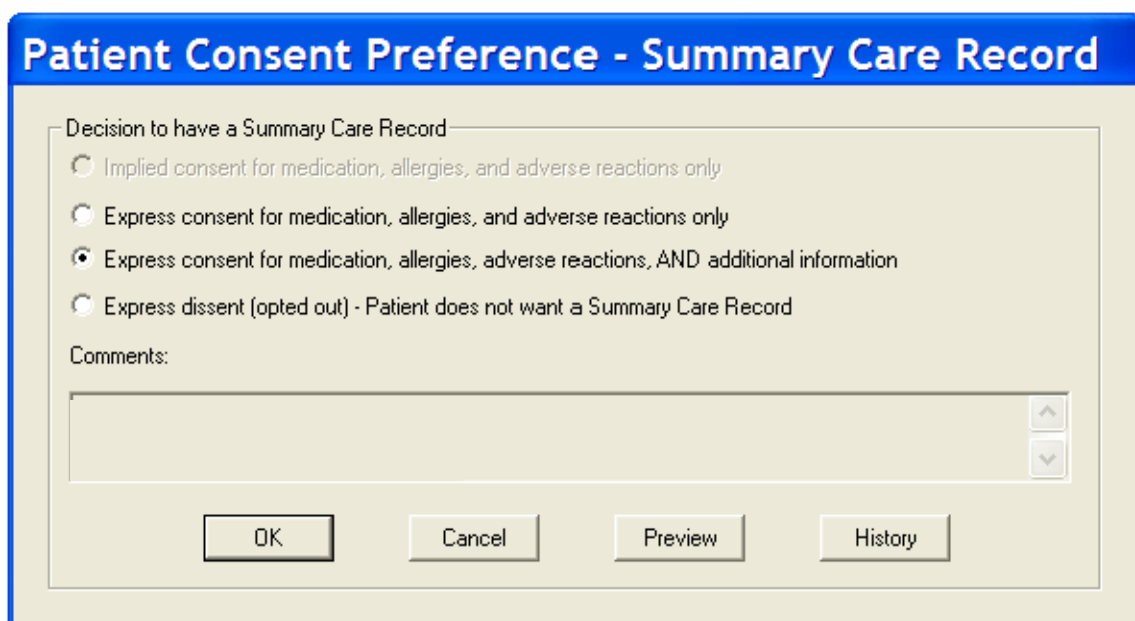
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## SCR Consent Preference Changes

### New SCR Consent Preference Read Codes

The Patient Consent Preference screen has now been updated to reflect the new SCR consent preferences. You will notice that there are now two options for giving express consent for data upload – one for adding the core data set only (ie medication, allergies and adverse reactions) and one for core and additional information. New Read codes have been implemented to reflect this.

You will also notice that the Consent to Share option has been removed from this screen (it is still accessible from Patient Registration - Consent).



*Patient Consent Preference Screen – via Patient Preferences and National Summary Preferences Button*

### New Consent Preference Read Codes

When a preference is selected, one of the following Read codes is recorded in a Medical History entry on the patient record.

**9Ndl.00** Implied Consent for Core Summary Care Record Data Set Upload

**9Ndm.00** Express Consent for Core Summary Care Record Data Set Upload

**9Ndn.00** Express Consent for Core and Additional Summary Care Record Data Set Upload

**9Ndo.00** Express Dissent for Core Summary Care Record Data Set Upload

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**Note** - 9Ndl.00 Implied Consent for Core Summary Care Record Data Set Upload cannot be selected from the Consent Preference screen as it is added as part of the initial upload process. However, it is possible to enter this Read code as a medical history entry).

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## Old Consent Preference Read Codes

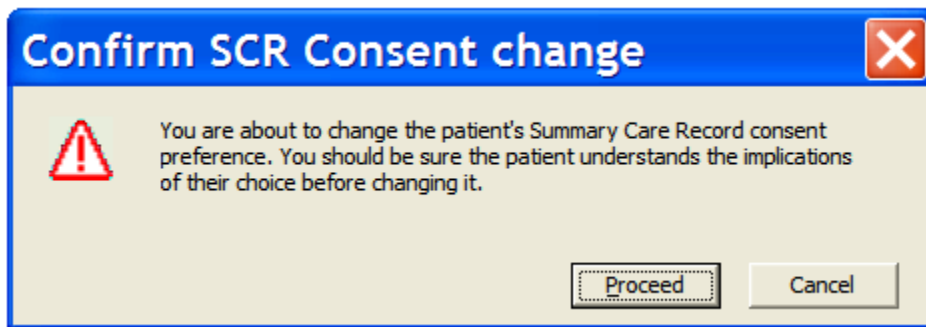
**For existing SCR users, the old consent preference Read codes will not be automatically replaced with the new ones. The deprecated codes will function as previously intended. However, you are advised to start using the new codes for all future data input. The legacy Read codes are:**

93C2.00 The patient wants to have a Summary Care Record

93C3.00 The patient does not want to have a Summary Care Record

## Confirm Consent Change

From now on, whenever you add, edit or delete an SCR consent preference via the SCR Consent Preference screen or via a medical history entry, you are prompted with the following warning:



Press **Proceed** to continue or cancel to go back to the medical history entry.

## New History Button

We have introduced a History button on the Consent Preference screen. This allows you to view a list of previously recorded consent preferences along with the date, Read code used and end date if entered:

Date	Code	Supplementary information	End Date
13/07/11	9Ndn.00	Express consent for core and additional SCR dataset upload	Need to send additional information

*SCR Consent Preference History*

Double click on any of the lines to view a full audit trail of the entry:

Event Date: 18 June 2011    Clinician: Dr Dop Doctor     Private  
 In Practice

Read Term for Characteristic:  
9Ndn.00 Express consent for core and additional SCR dataset up

Comment:

Type of Characteristic: Administration    Episode Type: <None>    Priority:

End Date:

Close    Help

<Previous    Next>    Changed on 20/06/2011 at 2:40.54pm by Dop Doctor    >>

*Consent Preference History Audit Trail*

## Preview Button

Depending on the Preference selected, the preview button displays a copy of the Initial or last sent SCR.

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## National Summary Tab Changes

### Reason for Medication

From DLM 380, you are still able to add Problem headers manually to the SCR, but now the patient must have a consent preference of **9Ndn.00 Express Consent for Core and Additional Summary Care Record Data Set Upload** recorded for the reason for medication problem header to be included in the SCR. Reason for medication will not be included if the patient is set to express consent for core information only.

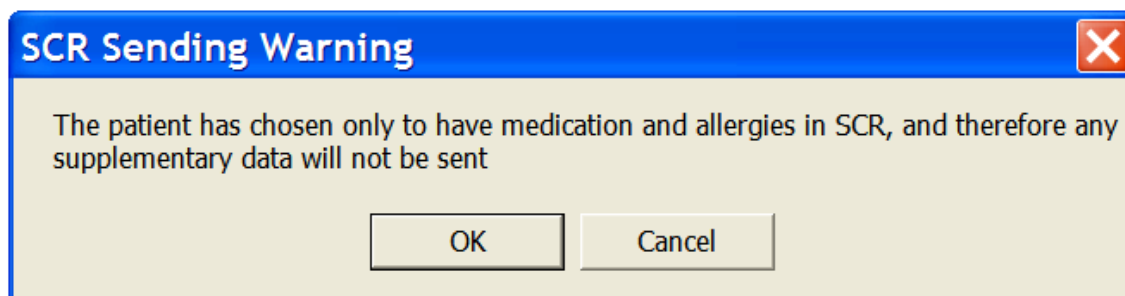
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**Note** – Problem headers are only sent during the initial upload if you have created a pre-tailored summary with **9Ndn.00 Express Consent for Core and Additional Summary Care Record Data Set Upload** recorded. In which case, a regular GP Summary message (including supplementary data) is sent during the initial upload rather than an initial upload message.

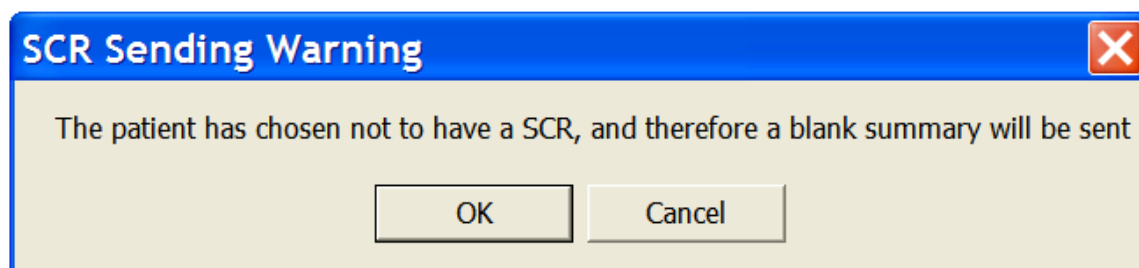
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### Send Warnings

The send button on the National Summary tab is now always available to allow you to easily resend summaries. Because of this, and as you can maintain the SCR for local practice use as well as national purposes, you are now warned if the patient does not have the correct corresponding preferences recorded sending a summary with supplementary data:



Likewise if the patient has chosen not to have an SCR at all and you are maintaining a local summary, you are warned that:



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## Clinical Audit for Outstanding SCRs

There are new SCR Clinical Audits to assist you in managing the SCR consent preference and for tracking unsubmitted summaries. These are available from [www.inps.co.uk](http://www.inps.co.uk) – My Vision – Clinical Audits along with a user guide.

In Practice Systems (V2)	
Summary Care Record & New Consent Preference (SCR)	
1. Patients eligibility for SCR and unsubmitted SCR	(Version 1, 26/09/2011)
2. Patients with NEW Consent Codes for SCR	(Version 1, 26/09/2011)
3. "Legacy" Consent Read Codes for SCR (93C2.)	(Version 1, 26/09/2011)
4. "Legacy" Dissent Read Codes for SCR (93C3.)	(Version 1, 26/09/2011)
5. Patients given a SCR printout	(Version 1, 26/09/2011)
6. Patients NOT given a printout of SCR	(Version 1, 26/09/2011)

*Clinical Audit – INPS Audits – SCR Audits*

For the "All patients where SCR has been created but not submitted" audit line, you can save the results of this audit to a group and use Next Group Patient option in Consultation Manager to go through each patient and send the summary (see Consultation Manager on-screen help for further details).

In Practice Systems (V2)	
Summary Care Record & New Consent Preference (SCR)	
1. Patients eligibility for SCR and unsubmitted SCR	(Version 1, 26/09/2011)
5313	Total Practice Population
0	0.00% All patients WITH an FP69 flag on their record
0	0.00% All patients with APPLIED registration status for more than 6 weeks
0	0.00% All patients where SCR has been created BUT NOT transmitted

*All patients where SCR has been created but not submitted audit line*

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## Mail Manager

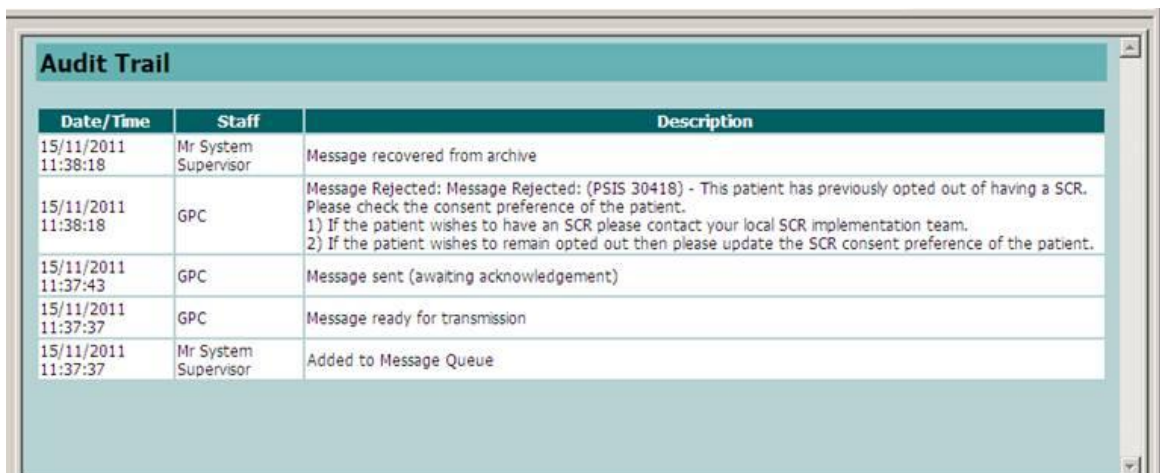
### Initial Summary Rejections

Initial upload messages are rejected when sending an initial upload for a patient that has previously dissented from participating in the SCR programme. The audit trail tab for the message in Mail Manager displays:

*"Message Rejected: (PSIS 30418) - This patient has previously opted out of having a SCR. Please check the consent preference of the patient*

*1) If the patient wishes to have an SCR please contact your local SCR implementation team.*

*2) If the patient wishes to remain opted out then please update the SCR consent preference of the patient."*



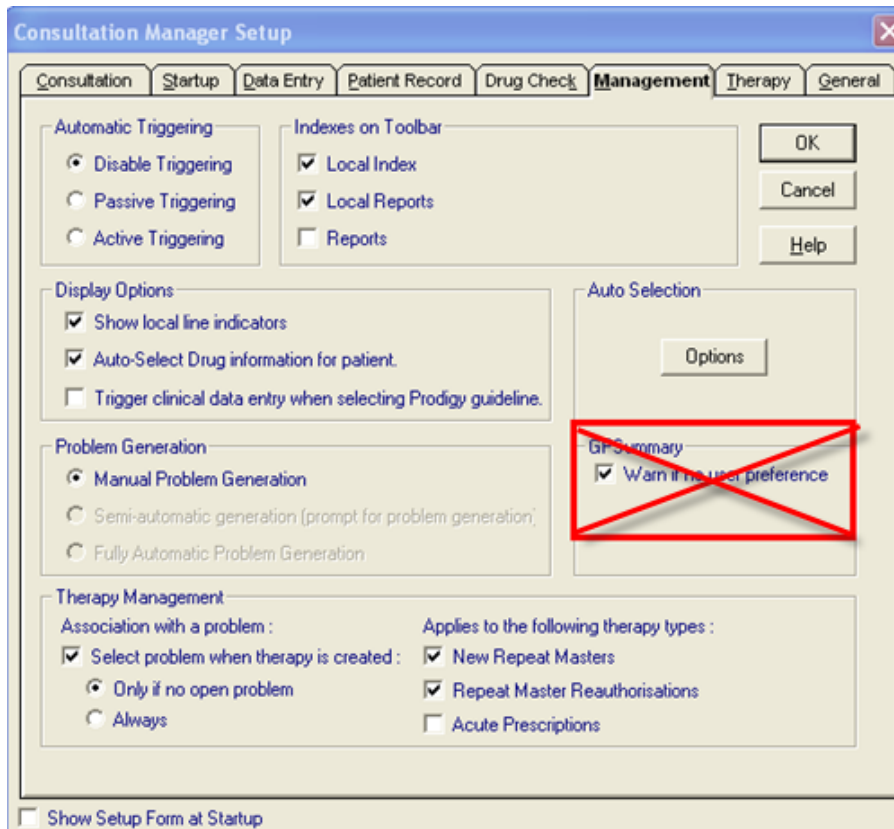
Date/Time	Staff	Description
15/11/2011 11:38:18	Mr System Supervisor	Message recovered from archive
15/11/2011 11:38:18	GPC	Message Rejected: Message Rejected: (PSIS 30418) - This patient has previously opted out of having a SCR. Please check the consent preference of the patient. 1) If the patient wishes to have an SCR please contact your local SCR implementation team. 2) If the patient wishes to remain opted out then please update the SCR consent preference of the patient.
15/11/2011 11:37:43	GPC	Message sent (awaiting acknowledgement)
15/11/2011 11:37:37	GPC	Message ready for transmission
15/11/2011 11:37:37	Mr System Supervisor	Added to Message Queue

*Mail Manager – Initial Upload Rejected Message – Audit Tab*

## SCR Functionality Removal

### Warn If No Patient Preference

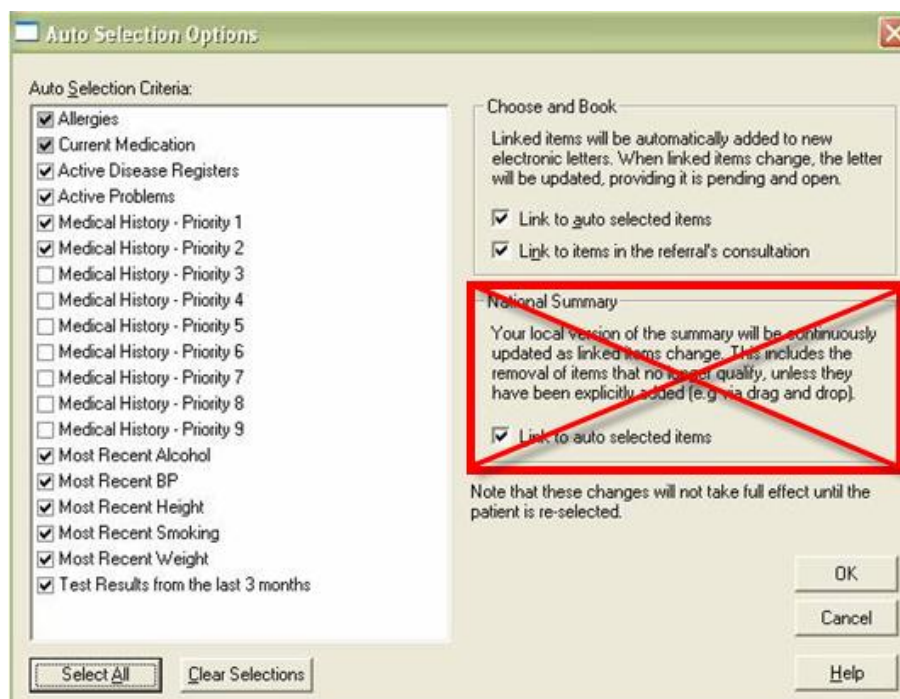
It is a new Connecting for Health requirement that practices should not be warned if the patient does not have a preference recorded. We have therefore removed this option from Consultation – Options Setup in Consultation Manager.



*Consultation – Options – Setup – Management – Warn if no user preference now removed*

## Auto Selection Options for SCR

It is also a new Connecting for Health requirement that supplementary data is only manually added to the SCR, hence the auto-selection option for SCR has been removed from Consultation – Options – Setup in Consultation Manager (NB it is still possible to select auto selection options for Choose and Book purposes). This is also no longer accessible from any of the National Summary right click menus.



*Consultation – Options – Setup – Management – Auto Selection- Options – National Summary section removed*

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**Note** - Existing supplementary data previously added by auto-population will remain on the SCR.

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