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## Registering Patients When SCR is Enabled

Once SCR is enabled, you register new patients as before in **Vision - Registration**. However, the registration process is updated to ensure SCR are sent for new patients.

The following details the process:

- **New Permanent Registrations** - New permanently registered patients have an SCR available to view and update in Consultation Manager. Patients with an existing summary on the Spine from their previous practice have a note attached to their SCR for 60 days advising that the SCR may not be up to date. See [New Permanently Registered Patients](#) (page 2)
- **PDS/ACS Mismatch** - Once you have registered a permanent patient their SCR is available, unless they have a Patient Demographic Service (PDS) or Access Control Service (ACS) mismatch. Any outstanding mismatch prevents the SCR being viewed, updated or sent. See [SCR PDS/ACS Mismatch](#) (page 6)
- **Non-Permanent Registrations** - Non-permanently registered patients, for example Temporary Residents, do not have a SCR viewable in Consultation Manager. To view a SCR for a non-permanent patient, use the SCR Viewer. See [Non-Permanently Registered Patients](#) (page 9)
- **Transferred Out Transactions** - When a patient transfers out their SCR automatically updates with a message that the SCR is no longer updated as the patient has left the practice. See [Transferred Out Patients](#) (page 9)
- **FP69 Notification** - When a patient fails to respond to an invitation or has returned NHS mail, for example, a breast screening invitation, they may have an FP69 Notification this is valid for six months. See [FP69 Flag](#) (page 10) [Transferred Out Patients](#) (page 9)



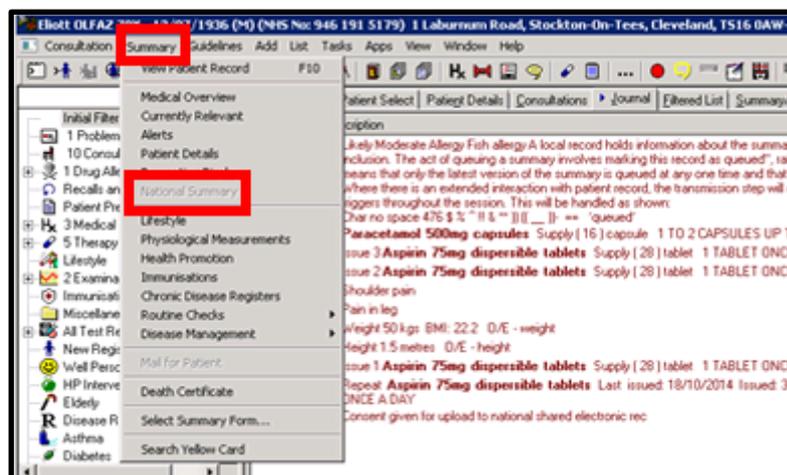
## New Permanently Registered Patients

When you register a new permanent patient, their application is completed in the following stages:

- **Applied** - When the patient's details are initially added to the **Vision – Registration** module, the patient's registration status is **Applied**; and the details are sent to the Health Authority (HA) for approval. See [Applied Registration Status](#) (page 2)
- **Permanent** - When an approval transaction is received from the HA, the patients registration status updates to **Permanent**. There are three scenarios' to consider here:
  - Permanent patients with an existing National Summary from their previous practice. See [Accepted patients with an existing National Summary from their previous Practice](#) (page 3)
  - Permanent patients with an existing National Summary from their current practice. See [Accepted patients with an existing National Summary from the Current Practice](#) (page 4)
  - Permanent patients without a previous National Summary. See [Accepted patients without a previous National summary](#) (page 4)

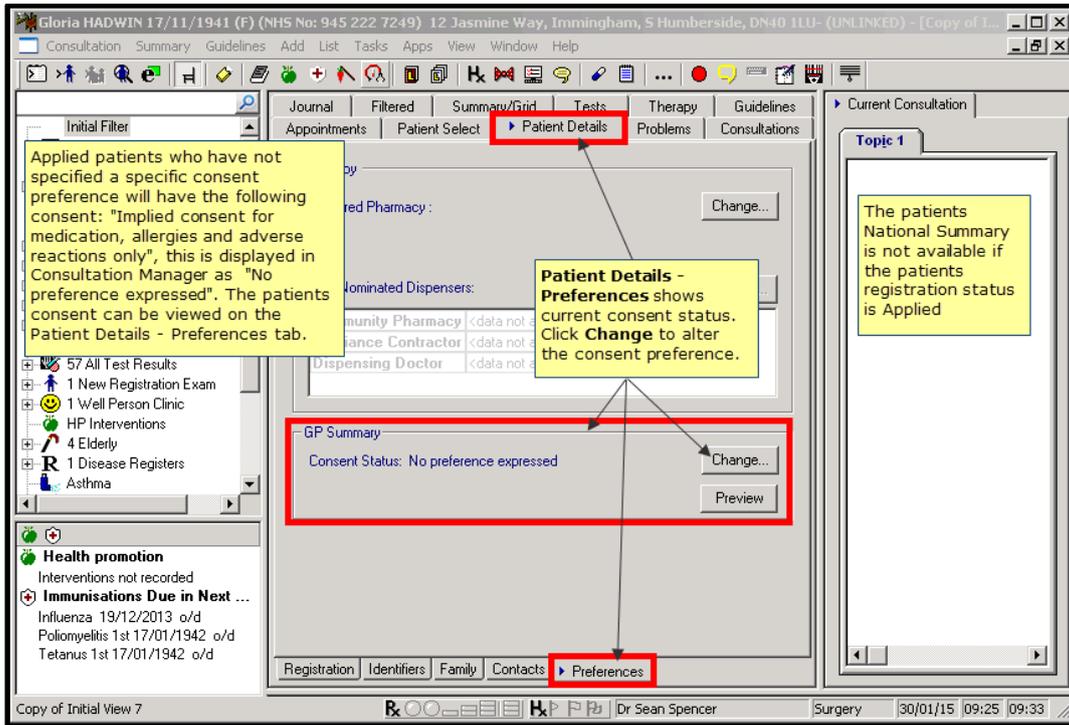
## Applied Registration Status

When a new patient requests to register at your practice their details are added in **Vision - Registration**. Once completed, the application is sent to the Health Authority (HA) for approval. Patients with an applied registration status are not included in the **Initial Upload** and you cannot access the **National Summary** tab in **Consultation Manager**. It is strongly recommended that you regularly search for patients with an erroneous registration status of **Applied**.



Whilst the patient is **Applied** their consent status can be updated, however, this is not sent to the Spine until the patient's record is next selected once they are **Permanent**. If no consent preference is recorded for the patient, implied consent is assumed, it is displayed as **No Preference Expressed** in **Consultation Manager**. When permanent the patient's SCR contains core data only.

Whilst **Applied** the patient's current consent status can be viewed in **Consultation Manager - Patient Details - Preferences**.



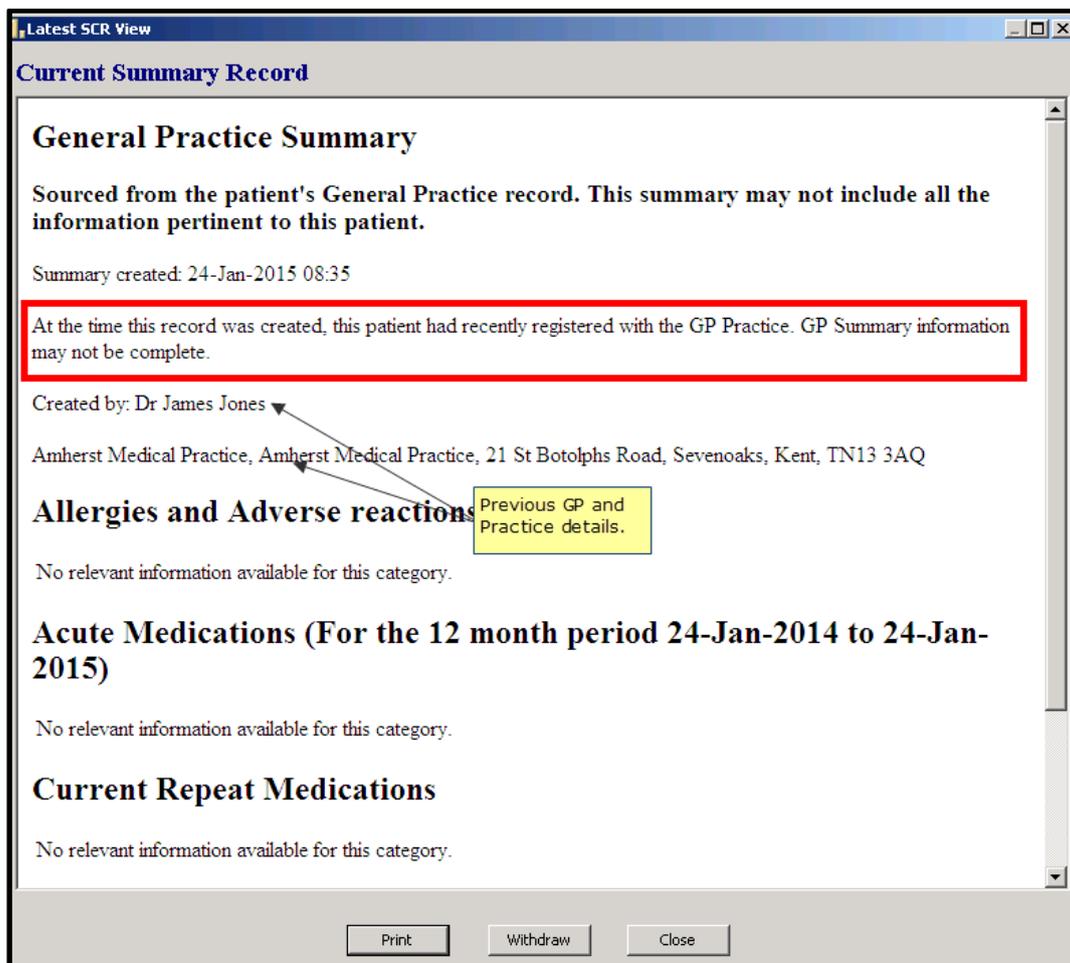
## Accepted patients with an existing National Summary from their previous Practice

When a new permanent patient is accepted, an **Approval Transaction** comes through for an **Applied** patient and is processed, Vision checks to see if they already have a **National Summary** on the Spine from their previous practice. If this is the case each time the **GP Summary** is updated in the next 60 days the SCR includes the following text message: *"At the time this record was created, this patient had recently registered with the GP Practice. GP Summary information may not be complete."*

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**Note** - The text message is not displayed in the local record or the summary preview. It is only displayed in the SCR on the Spine.

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Once the patient is permanent each time their patient record is selected it is checked for PDS and ACS mismatches. If a PDS or ACS mismatch exists, their summary cannot be sent. You need to resolve the mismatch to ensure new updates can be sent. See [SCR PDS/ACS Mismatch](#) (page 6)

### Accepted patients with an existing National Summary from the Current Practice

If the permanent patient has an existing summary from the current practice the summary updates and is sent when the patient is next selected in **Consultation Manager**. When the patient is selected a PDS and ACS synchronisation automatically runs. If the patient has a mismatch, updates to their summary cannot be sent. Therefore, any mismatch should be resolved as soon as possible to ensure updates are sent. See [SCR PDS/ACS Mismatch](#) (page 6)

### Accepted patients without a previous National summary

If an accepted patient does not already have a National Summary on the Spine, a GP Summary message is automatically sent for the patient, this contains all the relevant clinical details as per the patient's consent when the patient is next selected in **Consultation Manager**.

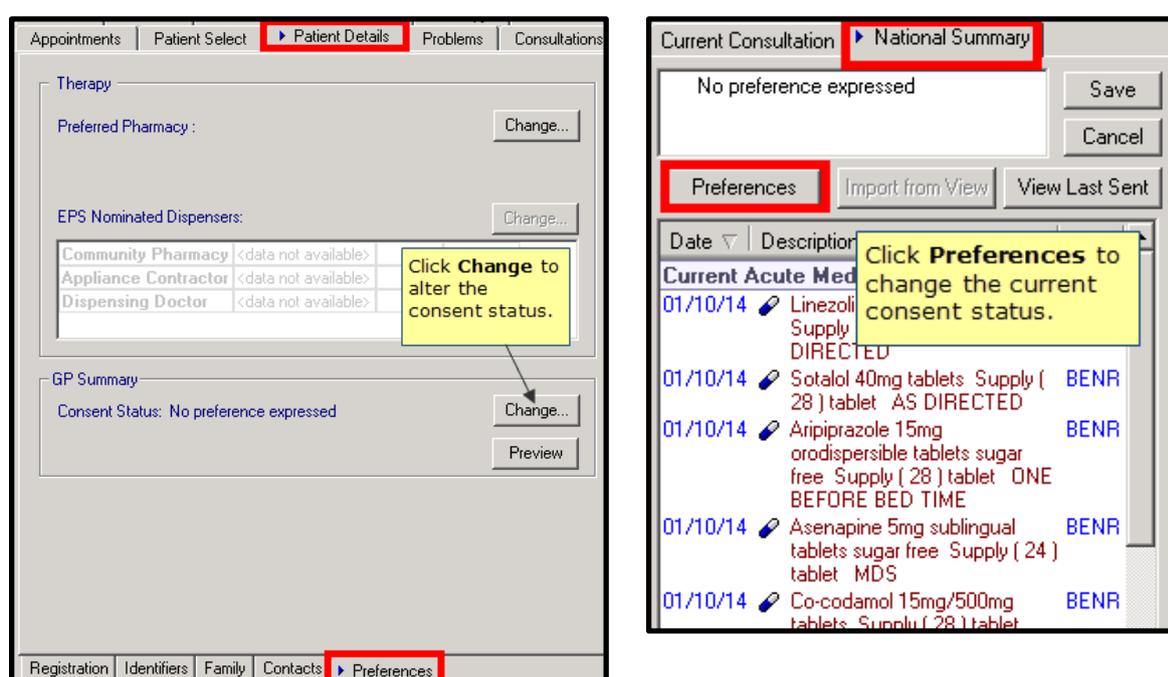
When the patient is selected a PDS and ACS synchronisation automatically runs. If the patient has a mismatch, updates to their summary cannot be sent. Therefore, any mismatch should be resolved as soon as possible to ensure updates are sent. See [SCR PDS/ACS Mismatch](#) (page 6)

## Consent Preference

During the registration process the patients Consent Preference is NOT sent to the spine. Once the patient's registration is **Permanent**, when they are next selected an ACS synchronisation is done. If the patient dissents and the local and Spine records do not match an **ACS mismatch** message displays. This must be resolved as soon as possible, by recording the patients preferred consent. An outstanding **ACS mismatch** prevents updates to the National Summary being sent. See [ACS Mismatch](#) (page 6)

Patients with no existing consent record are assumed to have implied consent this displays as **No Preference Expressed** in **Consultation Manager**. This does not upload to the Spine. Once permanent their SCR contains core data only.

Whilst the patient's registration status is **Applied** their consent status displays in **Consultation Manager - Patient Details - Preferences**. When their registration is updated to **Permanent**, their consent status is also available to view on the **National Summary** Tab.



For further consent details see the SCR Quick reference - Consent Model.

## Unlinked patients

Patients who are not found on the PDS system or have personal/demographic mismatch details for example, telephone numbers which have not been successfully SCR PDS synchronised, are unlinked. This displays at the top of the screen with the patient details.

Any information added that is relevant to SCR, is added to the National Summary (the local record) but is not sent to the Spine (for consenting patients) until the patient is subsequently selected and found on the PDS system or their details are verified and updated.



## SCR PDS/ACS Mismatch

### PDS/Vision Mismatch

Each time you select a patient in Vision their demographic data is checked automatically with the patient's details on the Spine. If there is a difference between the two records a **PDS/Vision Mismatch** screen displays. You can select to update the records if you can confirm the details are correct or you can choose to defer the change.

If you choose to defer, a SCR PDS synchronisation runs automatically. See [SCR PDS Synchronisation](#) (page 6)

### SCR PDS Synchronisation

If you choose to defer, a SCR PDS synchronisation runs automatically. The following criteria must be synchronised in order to update or send the patient's SCR:

<b>NHS number</b>	<b>Forename</b>
<b>Gender</b>	or
<b>DOB</b>	<b>Postcode</b>
<b>Surname</b>	

Where a SCR PDS synchronisation is successfully run, **Identity Confirmed** displays in the patient title bar in **Consultation Manager**. You are then able to access national services for SCR functionality.

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

Points to note:

- If PDS and Vision data have corresponding blanks for non-mandatory demographic information, for example other than the above, the PDS synchronisation is regarded as matched.
- If the patient demographic data is not successfully SCR PDS synchronised, the patient is **Unlinked**. You can view their local and Spine summaries, but any changes to the local summary are NOT sent to the Spine.

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 **Note** - A Daybook/Tasks task is created for unlinked patients as they have an outstanding PDS mismatch. Updates to the summary cannot be sent or queued until the mismatch is resolved. See Daybook and SCR - PDS Mismatches in the On-screen help for further details.

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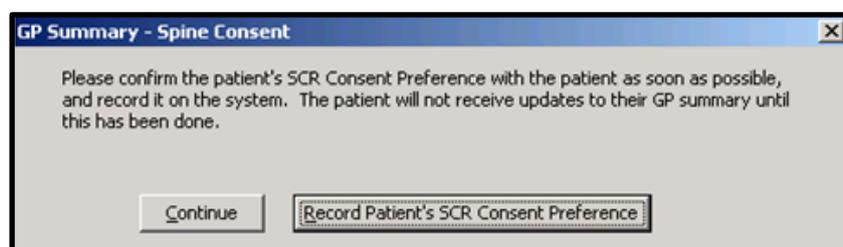
## ACS Mismatch

Each time a patient is selected in Consultation Manager their local consent status is checked with the Spine, if the patient has dissent recorded either on the Spine or in the local records but not both, an **Access Control Service (ACS) mismatch** message displays. A Daybook/Tasks task is created and a reminder is added.

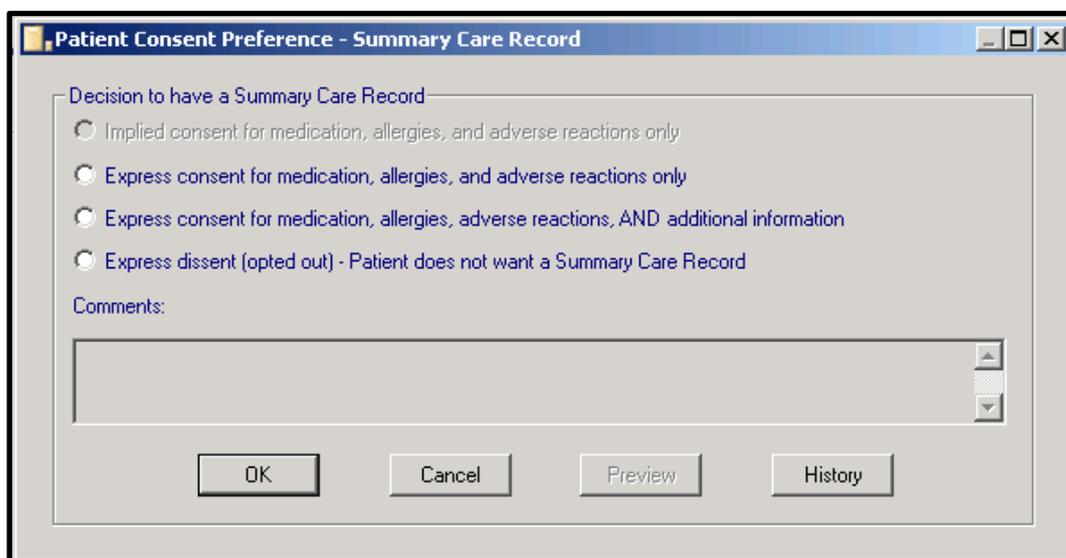
**Note** - Consent mismatches are unlikely to happen if you have run **Consent Migration**, see [SCR Quick Reference – Consent Model](#) for details.

To resolve an **ACS mismatch**:

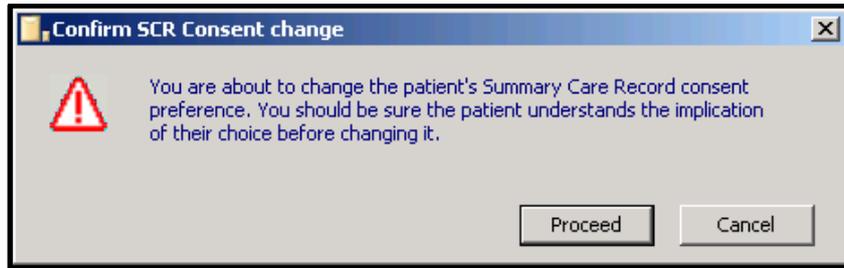
1. From **Consultation Manager**, select the patient required.
2. If an **ACS mismatch** exists you are prompted: *"Please confirm the patient's SCR Consent Preference with the patient as soon as possible, and record it on the system. The patient will not receive updates to their GP summary until this has been done."* To record a consent, select **Record Patient's SCR Consent Preference**.



3. **Consultation Manager** opens automatically and the **Consent Preference** screen displays, select a consent preference for the patient.



4. Select **OK**. You are prompted *"You are about to change the patient's Summary Care Record consent preference. You should be sure the patient understands the implication of their choice before changing it."* Select **Proceed** to change the preference.



5. The patient's consent preference is now updated and can be viewed on the **National Summary** tab and the **Alerts** pane, the Read code is added to medical history. The ACS mismatch is now resolved and the consent sent to the Spine.

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**Note** - You must process consent mismatches to ensure no SCR messages are accessible for dissenting patients. A Daybook/Task task is created each time a patient is selected if they have an outstanding ACS/consent mismatch; this also displays as a reminder in Consultation Manager.

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## Non-Permanently Registered Patients

You can access SCR records for patients that are not permanently registered at your practice via the SCR Viewer module. This includes options to access the SCR message for emergency access or legal reasons and is monitored by the local Privacy Officer.

**Note** - Access to this viewer requires your Smartcard, the viewer is not available offline. You must also have access to Consultation Manager and the relevant SCR Viewer RBAC roles.

Prior to selecting a patient via the **SCR Viewer**, the patient must be registered as a non-permanent patient in **Vision - Registration**.

The following mandatory details are required:

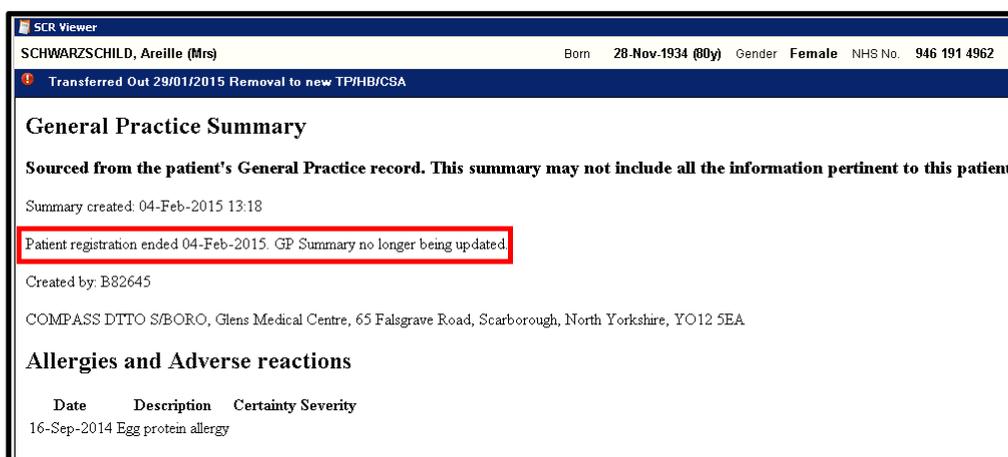
- NHS Number
- Surname
- Gender
- DOB
- Forename or Postcode

For further details see On-screen help for SCR Viewer and the SCR Quick Reference - Viewing Temporary Patient's SCR's

## Transferred Out Patients

When a **Deduction transaction** is received from your TP and processed, the patient's registration status changes to **Transferred Out**. This triggers an automatic process which checks if the patient has a GP Summary from the practice on the Spine. If they have, an SCR is sent updating the summary to show that the patient is no longer registered at your practice, and the following message is added: "*Patient registration ended (date of the deduction displays). GP Summary no longer being updated.*" If the latest GP Summary on the Spine has a different practice code (NACS code), no update is sent.

Once a patient is transferred out you can no longer view the **National Summary** in **Consultation Manager**.



The screenshot shows the SCR Viewer interface for a patient named Mrs. Areille Schwarzschild. The patient's details include: Born 28-Nov-1934 (80y), Gender Female, NHS No. 946 191 4962. A status message indicates: Transferred Out 29/01/2015 Removal to new TP/HB/ICSA. The General Practice Summary section is titled "General Practice Summary" and includes a warning: "Sourced from the patient's General Practice record. This summary may not include all the information pertinent to this patient." The summary was created on 04-Feb-2015 at 13:18. A red box highlights the text: "Patient registration ended 04-Feb-2015. GP Summary no longer being updated." The summary was created by B82645 at COMPASS DTTO S/BORO, Glens Medical Centre, 65 Falsgrave Road, Scarborough, North Yorkshire, YO12 5EA. The Allergies and Adverse reactions section lists an allergy: 16-Sep-2014 Egg protein allergy.

## Bulk Transfer - Practice Split/Closure

When there is a practice split and the patients affected are being transferred out, you need to run the **Bulk De-registration** upload. You need to create a group of the patients affected by the split. This group is then used when running the upload.

The patients in the group have the following message added to their SCR "*Patient registration ended (the date of deduction displays). GP Summary no longer being updated.*" and a transaction sent from **Registration Links** to request the patients are transferred out.

If the practice is closing, consider running the **Practice No Longer Contributing** upload, which sends an updated SCR with a note that the practice is no longer contributing to SCR.

For further details see SCR Quick Reference – Running Bulk Uploads

## FP69 Notifications

The **FP69 form**, originally known as the green card, has been replaced by an equivalent electronic **FP69 Prior Notification** transaction between the HA and GP practice. This gives the patient an **FP69** status if there is some doubt that the patient is still with the practice. Often it follows an unanswered letter from the HA to the patient.

There is a six months' deadline given for action by the GP. On the patient's **FP69** tab in **Registration**, you can reply either that you want the patient to stay on the list, or request that the patient be deducted. Taking no action means the patient is deducted at six months when the **FP69** status expires, with a **Deduction code of 14 Returned Undelivered**.



**Training Tip** - Add a reminder in **Consultation Manager** for patients with an FP69 flag.

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The FP69 has an impact on the National Summary as consent cannot really be presumed if the patient relationship with the surgery is in question. Therefore, all patients with an FP69 flag are not included in the **Initial Upload** process, you cannot view or update the SCR.

To find patients with an FP69 Status:

1. From **Registration**, select **Actions - Respond to FP69 Prior Notification**, this should list all the patients with an FP69 Status.
2. Select the patient and then **Edit**  to confirm that the patient be deducted or kept on your list.

If you request that a patient be kept on your list, once the FP69 flag has been removed, the patient's consent and National Summary are updated when the patient is next selected in **Consultation Manager**.

If you have requested that the patient be removed, a Deduction transaction is received from the HA and the **National Summary** updates when the transaction is processed. See *Transferred Out Patients* (page 9)

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**Note** - We strongly recommend that you check for patients with an FP69 status on a regular basis.

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See the Registration help file for more detailed information about FP69's.