SCR in Consultation Manager
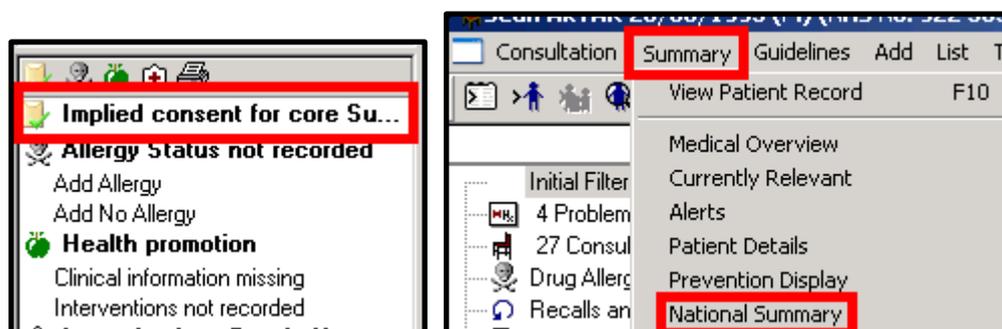
Viewing the National Summary

> **Important** - You must login with your Smartcard to access Spine services.

To view or update SCRs, you must be Smartcard authenticated. The National Summary can be viewed whilst offline, but any changes you make to the summary or consent will be queued until you next login with your Smartcard.
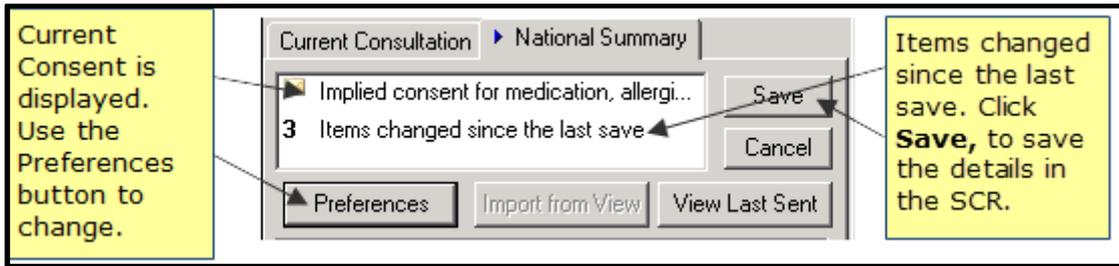
To select the National Summary:

1. From **Consultation Manager**, select a patient and start a consultation.

2. Double click on the consent status displayed in the alert pane, or select **Summary - National Summary**:
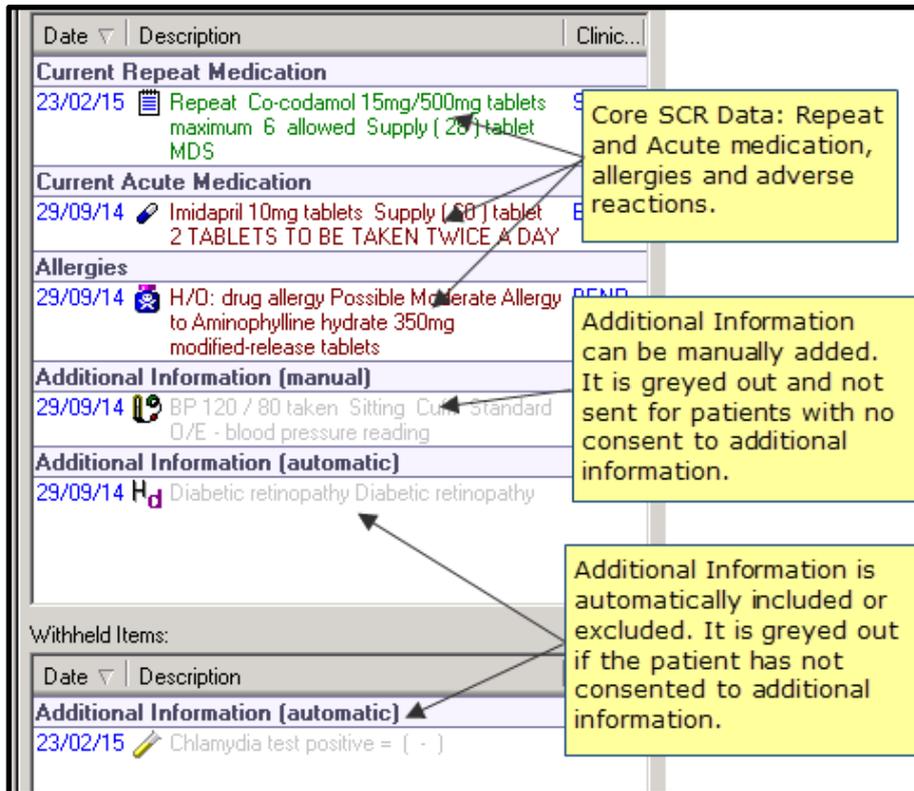

3. The **National Summary** displays on the right of your screen, with the **Current Consultation** tab.
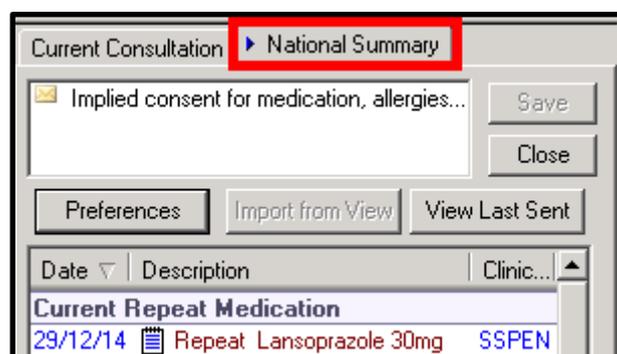
4. The **National Summary message header** displays the current consent status and details of any items which have been changed since the last save.

Current Consent is displayed. Use the Preferences button to change.

Items changed since the last save. Click Save, to save the details in the SCR.

5. Core data displays in the main window, this varies with each patient depending on their consent status. It consists of:

Core SCR Data: Repeat and Acute medication, allergies and adverse reactions.

Additional Information can be manually added. It is greyed out and not sent for patients with no consent to additional information.

Additional Information is automatically included or excluded. It is greyed out if the patient has not consented to additional information.

- **Current repeat medication** - All repeat medication that has not been discontinued. If the repeat has been prescribed the Date of Issue is displayed, otherwise the Date of Authorisation is shown. If the medication has been linked to a problem this is displayed in the SCR if the patient consents to additional data.

- **Current Acute Medication** - All acute medication issued in the last 12 months. If the medication has been linked to a problem this is displayed in the SCR if the patient consents to additional data.

- **Allergies** - All drug and non-drug allergies and adverse reaction details are displayed here.

- **Additional Information (automatic)** - Patients with consent **9Ndn.00 Express consent for core and additional SCR dataset upload** have additional items displayed. Additional Information is greyed out and is not sent for patients whose consent is to core Summary Care data only (Medication, allergies, and adverse reactions only). You can manually add data to the SCR if required. See *Additional Information* (page 5*Error! Bookmark not defined.*), *Manually Add Data* (page **Error! Bookmark not defined.**) and *Import from View* (page **Error! Bookmark not defined.**) for further details.

- **Withheld Items** - Patients with consent **9Ndn.00 Express consent for core and additional SCR dataset upload** have excluded items withheld automatically. Withheld Additional Information is greyed out for patients who do not consent to additional SCR data. See *Withheld Data* (page **Error! Bookmark not defined.**)

6. The National Summary data is automatically sent to a patient's Summary Care Record when the local record has been updated and the patient deselected. The send button has been moved to the right mouse menu. See *Manually Sending the National Summary* (page 9)

Consent Preferences

All patients have a consent status recorded in their records. If the patient has specified a particular consent this displays. If no consent has been recorded and they do not have an existing SCR on the Spine, the following consent displays:

- **No Preference Expressed** - This displays in **Consultation Manager - Patient Details - Preference,** or **National Summary - Preferences** as "No Preference Expressed". Vision assumes Implied Consent for this preference and sends SCR updates with the relevant clinical data.

During your Go-Live, running a process called **Consent Migration** sends all locally recorded dissent records to the Spine. The patient's consent is then checked each time the patient is selected as part of the patient synchronisation criteria. For dissenting patients, if there are differences between the Spine and the local record an **Access Control Service (ACS) mismatch** message displays and must be resolved.

> **Note -** To record consent, a Smartcard login and RBAC business function B0020 are required. An existing consent can be changed whilst offline, although the update is not sent to the Spine until you login with your Smartcard. To preview or print the SCR or view the consent history business function B0370 is required, this also gives you the same functionality whilst offline.

To change the patient's preference:

1. The patients consent preference can be updated via **Preferences** on the **National Summary**.

2. Depending on the preference expressed by the patient select one of the following:

- **Express consent for medication, allergies, and adverse reactions only -** The following clinical term records in the patient's record, 9Ndm.00 Express consent for core Summary Care Record dataset upload. Additional information and withheld items are greyed out.

- **Express consent for medication, allergies, adverse reactions, AND additional information -** This records in the patient's record with the following clinical term, 9Ndn.00 Express consent for core and additional SCR dataset upload. Additional information and withheld items are displayed.

- **Express dissent (opted out) - Patient does not want a Summary Care Record -** This records in the patient's record with the following clinical term, 9Ndo.00 Express dissent for Summary Care Record dataset upload. No SCR is sent for this patient.

3. Select **OK.**

4. The '*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*.' message displays, select **Proceed** to change the preference:
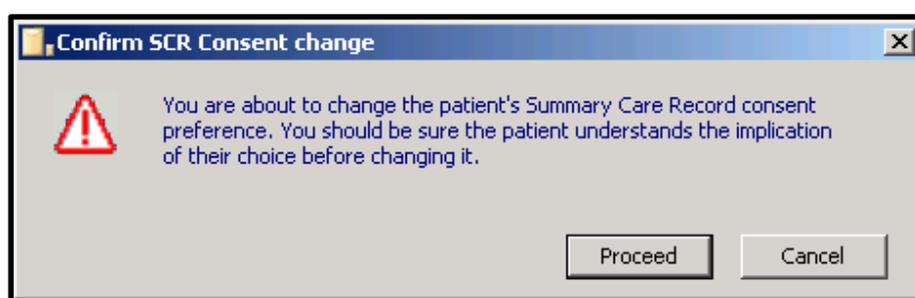
5. The patient's consent preference is now updated and can be viewed on both the **National Summary** tab and the **Alerts** pane, the clinical term has been added to medical history.

You can preview the summary and view the consent history, for further details see the *Quick Reference - Consent Model*

Additional Information

Additional Information (automatic) displays for all patients within the **National Summary**. If the patient consents to **Additional Information**, the details automatically update and are sent to the Spine. For patients without the required consent, the displayed information is greyed out and not sent to the Spine.

Additional Information (automatic) consists of non-core data that is specified for inclusion from a list of Read codes supplied and maintained by NHS Digital and Vision.

Note - Automatically included and Core data cannot be manually withheld.

The following table shows the types of data included:

| GP Record Additional Data	Vision Data
Reason for medication	Linked problems added to medication.
Significant past medical history	Active problem headers and Priority 1 medical histories. (See note below).
Significant previous procedures	All procedures with a Read code of 7% (excluding 7L1%, 7M%, 7N%, 7P%, 7Q%)
Anticipatory care information	Anticipatory care information as determined by Key Information Summary.
End of life care information	As detailed in the EOLC dataset ISB-1580.
Immunisations	All records with a Read code of 65%.
Any other specific coded data items in the SCR inclusion set	As detailed by NHS Digital and Vision

Important - Only medical histories with a Priority 1 are included in the additional data, unless they fall into one of the other categories. If you have NOT used the Priority 1 for significant medical history this is not automatically included in the patients National Summary. There is a Priority Update utility available which enables you to change priority numbers for a group of patients, see *Priority Update*.

Manually Add Data

You can manually add additional information to the National Summary, to manually add multiple items of the same data type use the Import from View option, see *Import from View* (page **Error! Bookmark not defined.**).

To manually add data:

1. From **Consultation Manager**, select a patient, open a consultation and view the **National Summary**.

2. Find the data you wish to add to the summary in the patient record.

3. Select the required data items, click and hold the **CTRL** button to select multiple items. Drag the highlighted data to the **National Summary** tab.
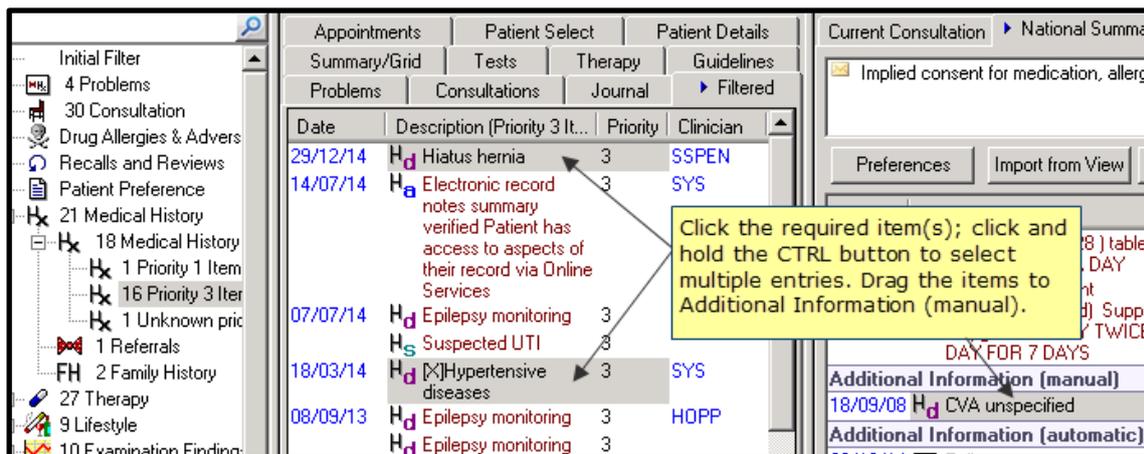
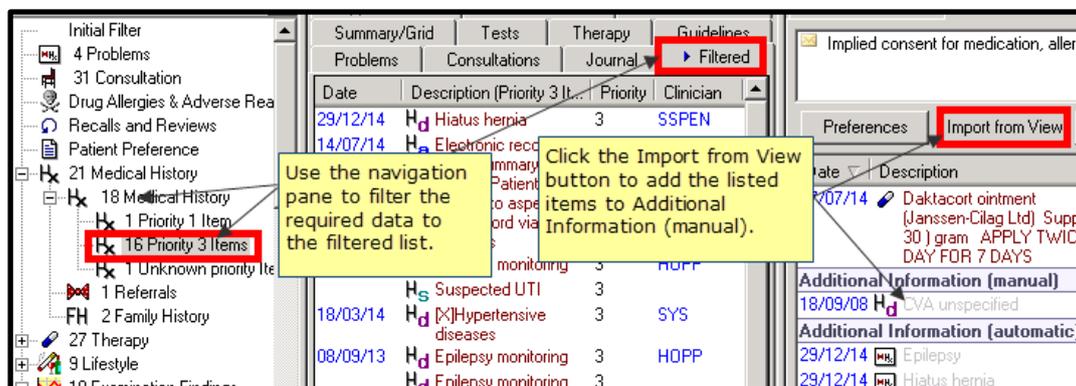4. The data is added to the Additional Information (manual) category.

> 🗒 **Note -** Additional Information (manual) can be added for all patients, but it is only sent to the Spine for patients who consent to Core data and additional information.

For details of how to remove manually added data see *Remove Manually Added Items* (page **Error! Bookmark not defined.**).

Import from View - Manually Add Multiple Items

To manually add multiple items from a specific Structured Data Area (SDA):

1. From **Consultation Manager**, select a patient, open a consultation and view the **National Summary**.

2. Use the navigation pane to filter the patient record so the data you want to add displays.

3. Select **Import from View** [Import from View], the filtered data is added to the **Additional Information** (manual) category on the **National Summary**.

For details of removing manually added data see *Remove Manually Added Items* (page **Error! Bookmark not defined.**).

Remove Manually Added Items

To remove data items that have been added manually to the National Summary:

1. From **Consultation Manager**, select a patient, open a consultation and view the **National Summary**.

2. Select the manually added additional information and either drag to the bin to remove, or right click and select **Unmark Item(s)**.

> **Note - Unmark Items** changes to **Revert Item(s) to Automatically Excluded**. If the additional information (manual) item is on the excluded list, selecting this option moves the item back to the **Withheld** list.
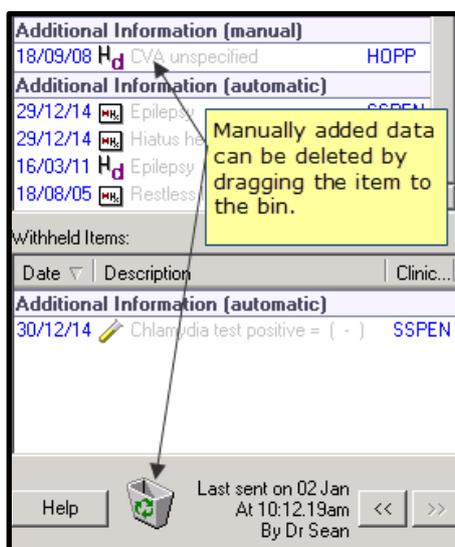
3. To remove multiple items, select and hold the **CTRL** key, then select all the manually added items you want to delete. Drag the selected items to the bin, or right click and select **Unmark Item(s)** to remove from the National Summary.

> **Note** - Core data and automatically added **Additional Information** cannot be manually withheld or dragged to the bin. Manually added additional information can be moved to the bin or be unmarked to remove it from the **National Summary**.

Withheld Data

A specific list of coded excluded items is used to automatically exclude potentially sensitive data, this is displayed in the Withheld Items section of the National Summary. For patients who do not consent to additional information the excluded items are displayed greyed out.

> **Note -** Automatically excluded data can be manually included if required. See *Manually Include Withheld Items* (page 8).

The list of coded excluded items includes codes for the following conditions as defined in the Royal College of GP's Sensitive dataset:

- Assisted fertilisation and in-vitro fertilisation (IVF).
- Sexually transmitted diseases (STD).
- Termination of pregnancy.
- Gender reassignment.

Manually Include Withheld Items

To manually include items listed as excluded on the Withheld Items list:

1. In **Consultation Manager**, select a patient, open a consultation and view the **National Summary**.

2. Select the excluded item or click and hold **CTRL** to select multiple items you want to include:
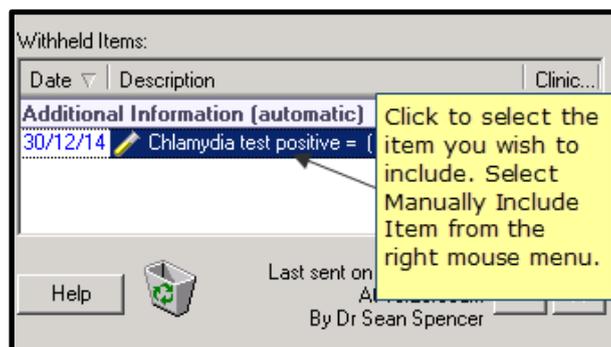
3. Right click and select **Manually Include Item(s)**. The selected items are moved to the **Additional Information** (manual) section of the **National Summary**.
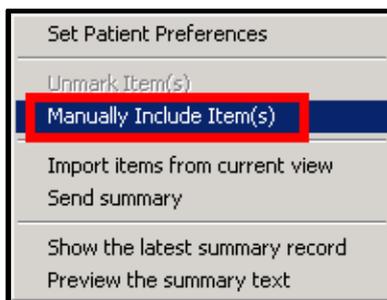
**4.** The updated information is sent to the Spine when the patient is deselected.

Viewing the Last Sent Summary

The last National Summary sent for the patient can be viewed using the **View Last Sent** View Last Sent button on the National Summary tab. Or select **Show the latest summary record** from the right mouse menu.

Manually Sending the National Summary

In some instances, you may want to manually send an SCR to the Spine during a consultation:

1. From **Consultation Manager**, select the patient and start a consultation.

2. Select **Summary** - **National Summary**.

3. Right click and select **Send summary**:
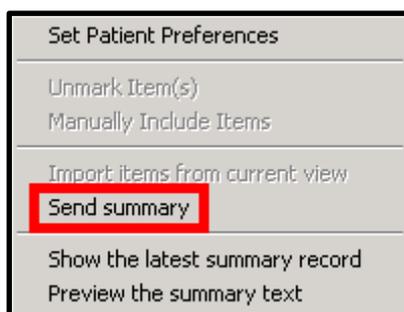
4. The '*GP summaries are automatically sent to a patient's Summary Care Record when the patient's local record has been updated. This action will manually send an additional GP summary update to the patient's Summary Care Record when the patient is deselected. Do you wish to proceed?*' message displays, select **OK** to send.
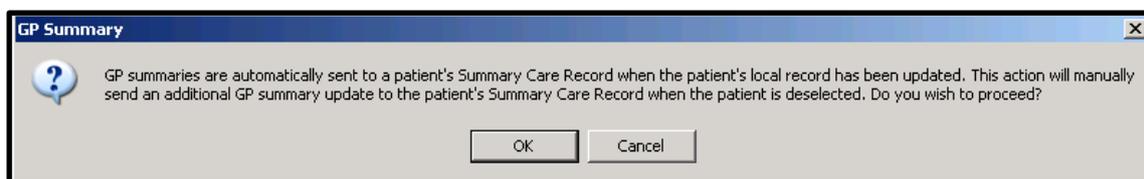
5. The **National Summary** tab is closed. The send message queues and is sent when the patient is deselected.

Alerts

There is a single alert displayed in the Alerts pane of the patient's record, to indicate the current locally held consent status for the patient.
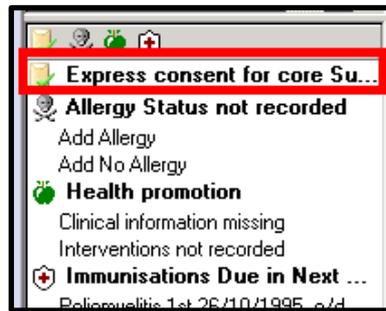
> **Note** - Double click the **Alert** to open the **National Summary**.

The following icons are used dependant on the consent status:

Consent Value	Icon	Text
9Ndl.		Implied consent for core Summary Care Record data
9Ndm.		Express consent for core Summary Care Record data
9Ndn.		Express consent for core AND additional Summary Care Record data
93C2.		Express consent for core AND additional Summary Care Record data
9Ndo.		Express dissent (opted out) - Patient does not want a Summary Care Record
93C3.		Express dissent (opted out) - Patient does not want a Summary Care Record