Viewing Non-Permanent Patient's SCR's

You can now 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 practice Privacy Officer, see *Appointing a Practice Privacy Officer* (page 1) for further details.

> 🗋 **Note** - Access to this viewer requires Smartcard access, the viewer is not available offline.

To use the SCR Viewer you must have access to Consultation Manager and the following RBAC roles and have a practice Privacy Officer in place:

- **B0370 - (View Summary Health Records)** - For the SCR Viewer.

- **B0168 (View when permission could not be requested)** - Emergency access to view the SCR.

- **B0082 (Legal Override of Consent)** - Legal access to view the SCR.

Appointing a Practice Privacy Officer

In line with the usual governance associated with the accessing of patient records, the Caldicott Guardian within each organisation has a responsibility for protecting confidentiality when it comes to SCR viewing. GP practices undertaking SCR viewing must ensure that at least one Privacy Officer (PO) has been nominated for their organisation. The Caldicott Guardian may choose to devolve this responsibility to another individual in the Practice. The Privacy Officer will need to manage any alerts that are generated via the Alert Viewer system on the NHS Spine Portal. It is worth noting that the Alert Viewer will not allow alerts to be closed by the same individual who created them, therefore practices may wish the Privacy Officer to be an appropriate member of staff who will not normally access SCRs.

For further information on setting up the Privacy Officer see the INPS Vision SCR Viewing guidance at *http://systems.hscic.gov.uk/scr/implement/viewing*.

Registering a Non-Permanent Patient in Vision

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 for the SCR Viewer:

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

See *Patients without the Mandatory Registration Details* (page 11)

If the patient has previously registered at your practice their personal details are still available and the patient can be re-registered, see *Re-register an Existing Patient Record* (page 2) for further details. If they have never been registered with you see *Add a New Temporary Patient to Vision* (page 3).

Whilst adding the patient's registration details you should be logged in with your Smartcard so the relevant PDS checks can be performed to ensure the patient's registration details are correct.

Re-register an Existing Patient Record

To re-register a non-permanent patient:

If the patient has been registered in the past but then left your practice their previous records are still available and can be re-activated.

1. Go to **Vision - Registration** and select the patient.

   💡 **Training Tip -** Remember to remove the Active Patients Only tick.

2. You are prompted "*This patient is no longer active. Do you wish to continue?*" Click **Yes**.
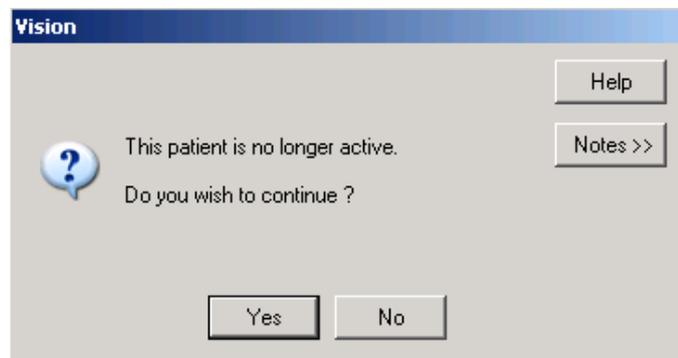
3. The patient's registration record is displayed, click **Action - Re-registration.**
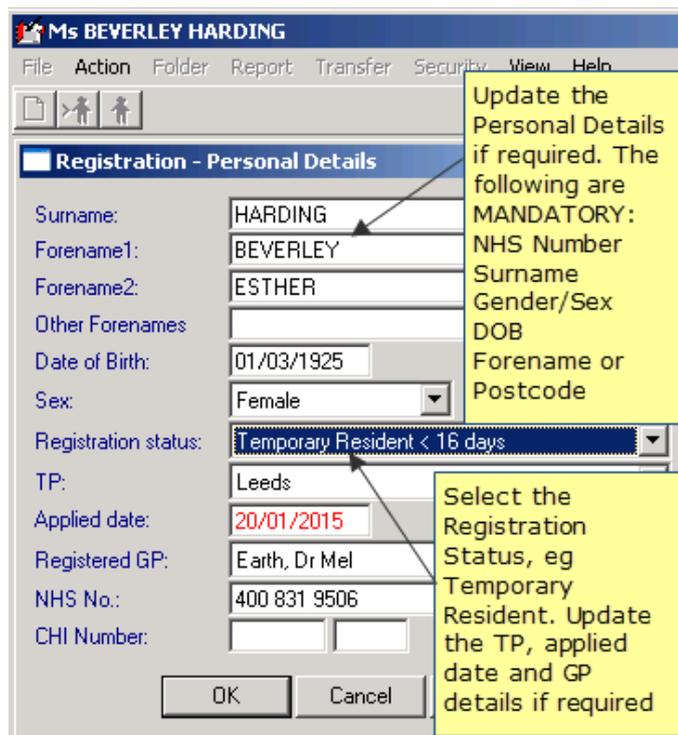

Registration - Action- Re-registration

4. The **Registration - Personal Details** are displayed, check the patient details eg Surname, DOB and update if required. The following details are **mandatory** for the SCR Viewer:

- NHS Number (This will need to be obtained from the Spine if not already in the patient's Registration record)

- Surname

- Gender

- DOB

- Forename or Postcode

5. Change the **Registration Status**, if the patient is in your area for less than 3 months use one of the **Temporary Resident** options. If they are unlikely to return to the area and need to be seen once only, select **Immediately Necessary** or **Emergency treatment**.

6. Update the Registered GP and TP details if required.

*Registration - Personal Details*

7. Click **OK**, the patient's registration details are displayed, update the patient's address details if required.

8. Click **OK** to finish, depending on the registration status selected you may be prompted to complete electronic IOS claim forms. The patient's SCR record can now be viewed in the SCR Viewer, see *Viewing the SCR* (page 6) for further details.

Add a New Non-Permanent Patient to Vision

> 📄 **Note** - You should be logged in with your Smartcard.

To add a new temporary patient:

1. You will need the following details from the patient:

   - NHS Number (if the patient does not know their number you can obtain it from the National Register)

   - Surname

   - Gender

   - DOB

   - Forename or Postcode

2. Go to **Vision - Registration** and click **New Patient** ▯.

3. Enter the details given by the patient to the New Patient window and click **Find** to search the National Register.
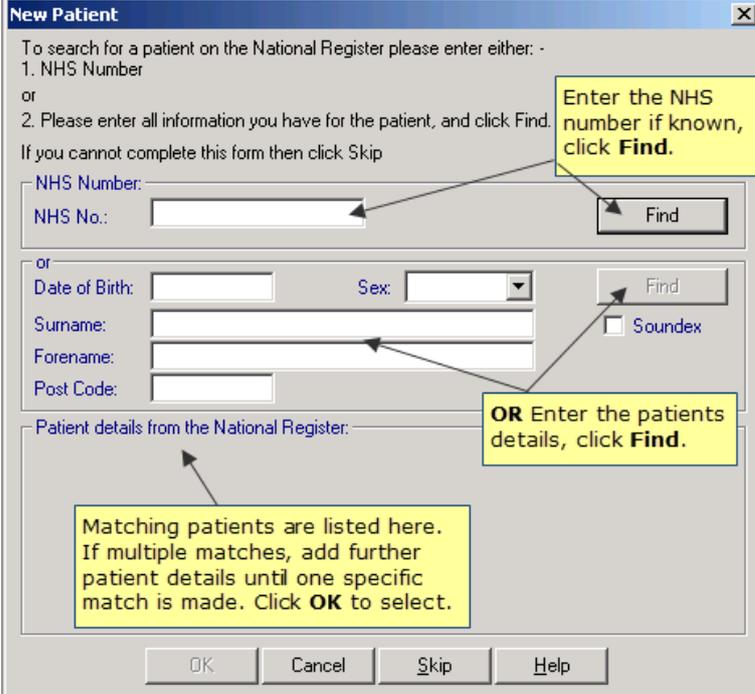
Registration - New Patient

4. One of the following scenarios can occur:

   - **Single patient found on PDS** - Click **OK.**

   - **Single patient not found on PDS** - You can add a patient manually, but they will not be synchronised with PDS and their SCR will not be accessible in the SCR Viewer. Click **Skip**.

   - **Multiple PDS Matches Returned** - Refine the search and try again to get a single match.

   - **NHS Number Already Exists on Vision** - See *Re-register an Existing Patient Record* (page 2) for details.

5. On selecting the match, you are prompted "*Add Member to an Existing Family, the Selected Patient's Family or a New Family*". Select one of the following:

   - **Existing** - Select if the new patient is to join a household of an existing patient already on your register.

- **Selected** - Add the new patient to the household of the patient previously selected by you, whose name appears on the title bar at the top of the screen.

- **New** - To create a new household and address, without using any existing defaults from any other household eg a previous address.

Registration - New Patient - Add to Family

6. The **Registration - Personal Details** are displayed. Check the patient details eg Surname, DOB and update if required. The following details are **mandatory** for the SCR Viewer:

- NHS Number

- Surname

- Gender

- DOB

- Forename or Postcode
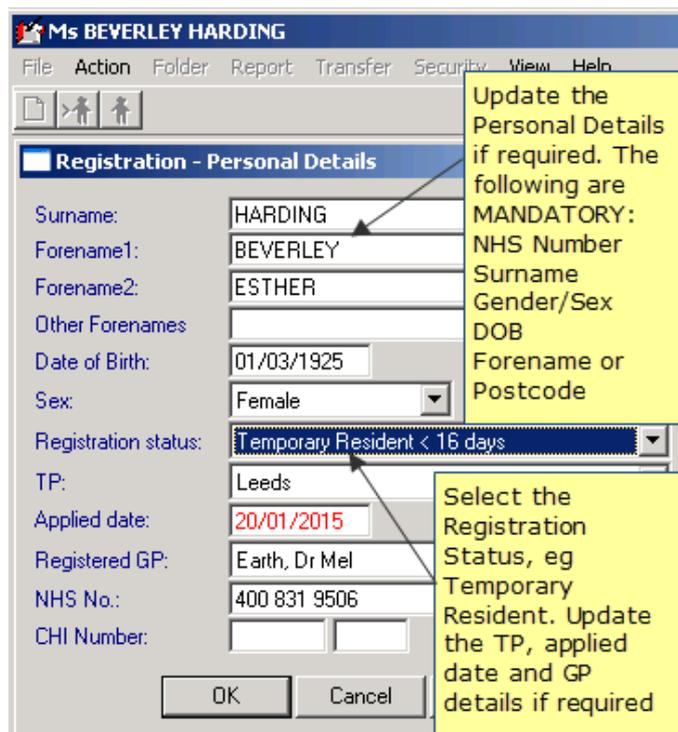
Registration - Personal Details

7. Change the **Registration Status**, if the patient is in your area for less than 3 months use one of the **Temporary Resident** options. If they are unlikely to return to the area and need to be seen once only, select **Immediately Necessary** or **Emergency treatment**.

8. Update the Registered GP and TP details if required.

9. Click **OK**, the patient's registration details are displayed, update the patient's address details if required.

10. Click **OK** to finish, depending on the registration status selected you may be prompted to completed electronic IOS claim forms. The patient's SCR record can now be viewed in the SCR Viewer, see *Viewing the SCR* (page 6) for further details.

Viewing the SCR

To access the SCR Viewer:

1. Go to **Vision Front Screen - SCR - SCR Viewer** .
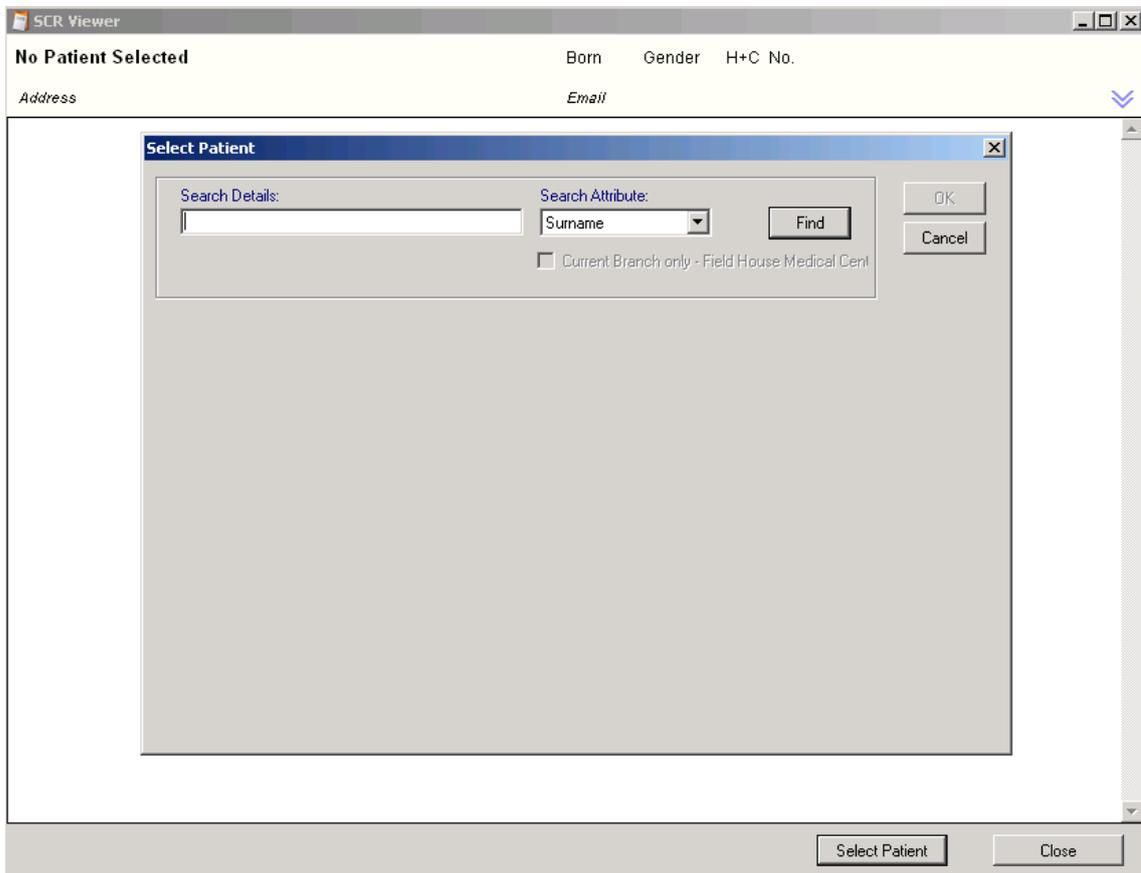
SCR Viewer

2. The SCR Viewer window with the Select Patient box open is displayed, add the patient search details eg Surname.

   Note - If the patient has been registered without the mandatory demographic details, you are unable to select and view the patient's SCR record. See *Patients without the Mandatory Registration Details* (page 11)

3. Click **Find** to search for the patient.

4. Select the correct patient and click **OK.**

5. A progress bar is displayed.

- If the patient is not permanently registered at the practice, their ACS consent status will be checked.

- If the patient has opted out of SCR, no summary will be displayed. You are prompted: *"This patient does not have a Summary Care Record (has opted out)".* Click **OK**.

- Patients without an NHS number are not accessible.

6. You are prompted *"Has the patient given you permission to view their Summary Care Record?"* Select one of the following options:
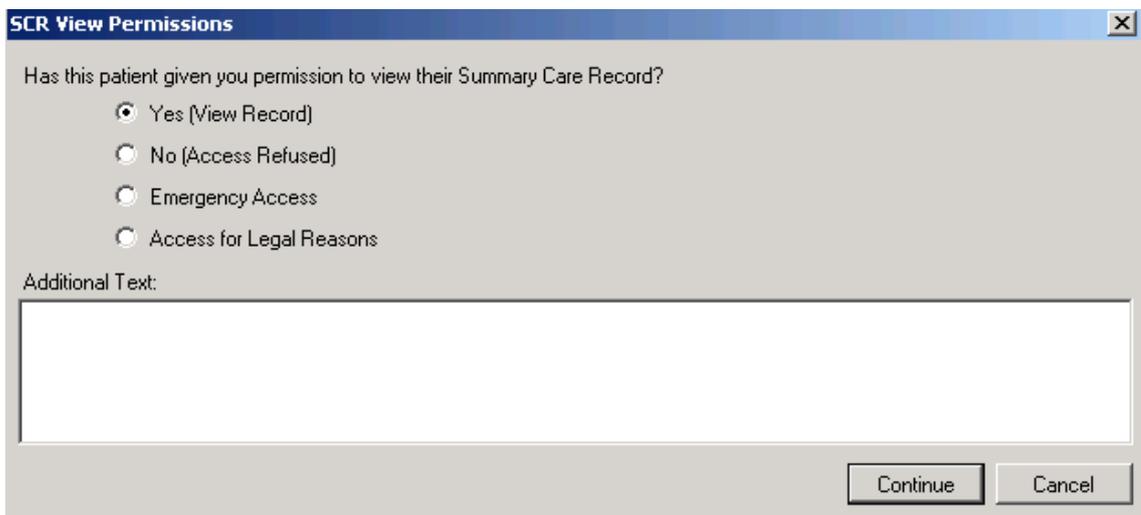
SCR Viewer - View Permissions

- **Yes (View Record) -** If the patient has given permission, click **Yes - Continue,** the patient's Summary Care Record is displayed.

- **No (Access Refused) -** If the patient has not given permission, click **No - Continue.** A *"No document to show"* message is displayed on the viewer, click **OK.**
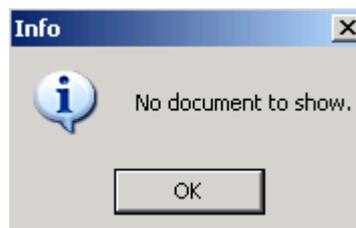
SCR Viewer - Patient Does Not Give Consent to View SCR

Emergency Access to SCR

If you have RBAC rights allowing Emergency Access viewing, you are able to view a SCR for a non-permanent patient in a clinical emergency, where you are unable to obtain the patient's consent.

1. Go to **Vision - SCR - SCR Viewer**. The SCR Viewer window with the Select Patient box open is displayed, select the non-permanent patient, eg Surname.

2. Select **Emergency Access**, you are prompted "*You are about to access the patient's Summary Care Record even though the patient has not given you their permission. You must have justification for this action, which will be audited and may be investigated.*" Select **Clinical Emergency.**

SCR Viewer - Emergency Access

3. Add additional text (optional) and click **Continue**.

4. You are prompted *"Are you sure you want to proceed?"* Click **Yes** to proceed.

SCR Viewer - Emergency Access - Confirmation

5. The patient's Summary Care Record is displayed.

General Practice Summary

Sourced from the patient's General Practice record. This summary may not include all the information pertinent to this patient.

Summary created: 28-Nov-2014 13:48

Created by: Dr Ben Richards

Field House Medical Centre, 13 Dudley Street, Grimsby, South Humberside, DN31 2AE

Allergies and Adverse reactions

Date	Description	Certainty	Severity	Supporting information
11-Aug-2014	H/O: drug allergy to Aminophylline hydrate 350mg modified-release tablets	Possible	Moderate	
11-Aug-2014	H/O: cat allergy	Possible	Moderate	Notes: All done by Filing API

Acute Medications (For the 6 month period 29-May-2014 to 28-Nov-2014)

Type	Date	Medication Item	Dosage instructions	Quantity
Acute Medi	Prescribed:11-Aug-2014	Linezolid 600mg tablets	AS DIRECTED	52 tablet

SCR Viewer - SCR Displayed

Access for Legal Reasons

This option is only visible if you have RBAC rights allowing Legal Access viewing of a SCR.

To view the GP Summary for legal reasons:

1. Go to **Vision - SCR - SCR Viewer**. The SCR Viewer window with the Select Patient box open is displayed, select the non-permanent patient, eg Surname.

2. Select **Access for Legal Reasons**, you are prompted "*You are about to access the patient's Summary Care Record even though the patient has not given you their permission. You must have justification for this action. which will be audited and may be investigated.*" Select one of the following options:

   - Access made in the public interest.

   - Access required by statute, including subject access requests made under the Data Protection Act 1998.

   - Access required by Court Order.

SCR Viewer - Access for Legal Reasons

3. Add additional text (optional) then click **Continue**.

4. You are prompted *"Are you sure you want to proceed?"* Click **Yes,** to proceed.

SCR Viewer - Legal Access - Confirmation

5. The patient's Summary Care Record is displayed.

General Practice Summary

Sourced from the patient's General Practice record. This summary may not include all the information pertinent to this patient.

Summary created: 28-Nov-2014 13:48

Created by: Dr Ben Richards

Field House Medical Centre, 13 Dudley Street, Grimsby, South Humberside, DN31 2AE

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Acute Medications (For the 6 month period 29-May-2014 to 28-Nov-2014)

Type	Date	Medication Item	Dosage instructions	Quantity
Acute Medication	Prescribed:11-Aug-2014	Linezolid 600mg tablets	AS DIRECTED	52 tablet

SCR Viewer - Patient SCR Displayed

Patients without the Mandatory Registration Details

If the patient doesn't have the mandatory registration details, when selecting the patient in the SCR Viewer you are prompted: "*This patient has insufficient detail recorded. NHS number, Surname, Gender, Date of Birth, and either Forename or Postcode are required.*" Click **OK** to close. The SCR message cannot be viewed.

Add the mandatory details to the patient's registration screen to resolve this and view the SCR.

> 📒 **Note** - To ensure patients are registered with the Mandatory details you should be logged in with your Smartcard when adding or updating their registration record.