



Summary Care Record

User Guide

England Only

Version 5

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National Summary Care Record

Introduction to Summary Care Record

Every patient in England has an electronic **Summary Care Record (SCR)**. This is also called the National Summary and sometimes, the GP Summary or NHS Care Record.

An individual is likely to be treated by a variety of care professionals in a range of locations throughout their life. The National Summary is a means of ensuring that the details of all their care and treatment are held in a single, easily accessible, electronic record.

It stores an individual's personal details, such as their address and date of birth, along with their health and care history. It includes information such as whether a patient is diabetic or has a drug allergy, as well as details of the treatment and care they have received to build up a comprehensive patient history.

It also holds a summary of contacts with all care providers and be the master source of an individual's medication history and record their consent for care professionals to view their NHS Care Record. The NHS Care Record means that patient records follow a consistent format, with the goal that it improves information sharing and treatment.

New Practices Preparing for SCR

The National Summary facility is being rolled out gradually across the NHS. You are informed by your CCG when your practice has met all the requirements needed to participate in the National Summary scheme and when your allocated date of commencement is.

Prior to your date of commencement you need to ensure you have Role Based Access Control (RBAC) fully enabled at your practice. RBAC has been in place for some time without directly affecting your access to specific functions in Vision. However, RBAC becomes a compulsory part of Vision once SCR 2.1 is installed. This means that once you login to Vision with your Smartcard, your access to Vision modules and functions is dictated by the roles and functions that are stored on your Smartcard (whether you login on or offline).

Practices who have EPS R2 enabled are already using RBAC, but need to ensure the relevant SCR roles and functions are added to their Smartcards

You must contact your CCG RA Manager prior to upgrading to SCR 2.1 and ensure that all staff have all their required functions and roles added to their Smartcards. Some staff also require the relevant SCR RBAC codes to be assigned to their Smartcard to perform SCR Functions, see [RBAC Roles used in SCR](#) (page 8)

RBAC Roles used in SCR

You must ensure you have the relevant RBAC codes on your Smartcard. If you need to add a role you need to ask your Registration Authority or those responsible for maintaining your Smartcard. This should be done prior to your commencement date if possible.

Table showing all available RBAC Business functions for SCR:

RBAC Business Function	Activity	Vision 3 Business Function
SCR - View, send, update, print, Withdraw		
B0370	Preview and print the local GP Summary View and print the most recent summary on the Spine	Consultation Manager : Read Only
B8029	Withdrawal of summaries	General : SCR : Withdraw
B0401 B0380 B8028 B0097 B8029	Update records and send to the SCR Manual send of a summary Inclusion and exclusion of items	Consultation Manager : Lock Patient (Update Data)
SCR - Record Consent		
B0020 AND B0401 B0380 B8028 B0097 B8029	Record SCR consent preference	Registration - Change Spine Sharing Consent AND Consultation Manager : Lock Patient (Update Data)
GP Summary Bulk Uploads & Queue Processing		
B0380	Schedule, manually start, manually stop, and manually restart bulk uploads, including the initial upload and queue processing	Bulk Transmission and Queue Processing applications
Enabling/Disabling SCR		
B0062	Switching GP Summary on or off	General : Configuration : Advanced Settings
SCR Viewer		
B0370	SCR Viewer	SCR Viewer Application
B0168	Emergency access to view the SCR	General : SCR : Emergency Access
B0082	Legal access to view the SCR	General : SCR : Legal Access
SCR Reporter		
B0011	View system logs and reports	Reports Application

How National Summary is to be rolled out

The National Summary rollout process will be put into action as follows:

Sixteen weeks before the Initial Upload of patient summaries onto the Spine, there was a public information campaign informing patients of what happens and the choices they have. Therefore patients have sixteen weeks to contact their surgery to dissent or limit their participation if they wish to do so.

On the day designated by your CCG for your SCR go-live you have the following tasks to perform:

- Switch on SCR functionality. See [Enabling/Disabling GP Summary](#) (page 10)
- Run the Consent Migration upload. See [Consent Migration](#) (page 25)
- Run the Initial Upload - This is a one-off upload of all non-dissenting patient summaries (Core Data) is automatically compiled and sent to the Spine. See [Initial Upload](#) (page 15)

Note - RBAC must be fully enabled (as for EPS R2) at your Practice before SCR can be enabled. You must contact your Registration Authority or those responsible for maintaining your Smartcard prior to your go-live day. See [Preparing for SCR](#) (page 8) and [RBAC Roles used in SCR](#) (page 8) for further details.

Enabling/Disabling GP Summary

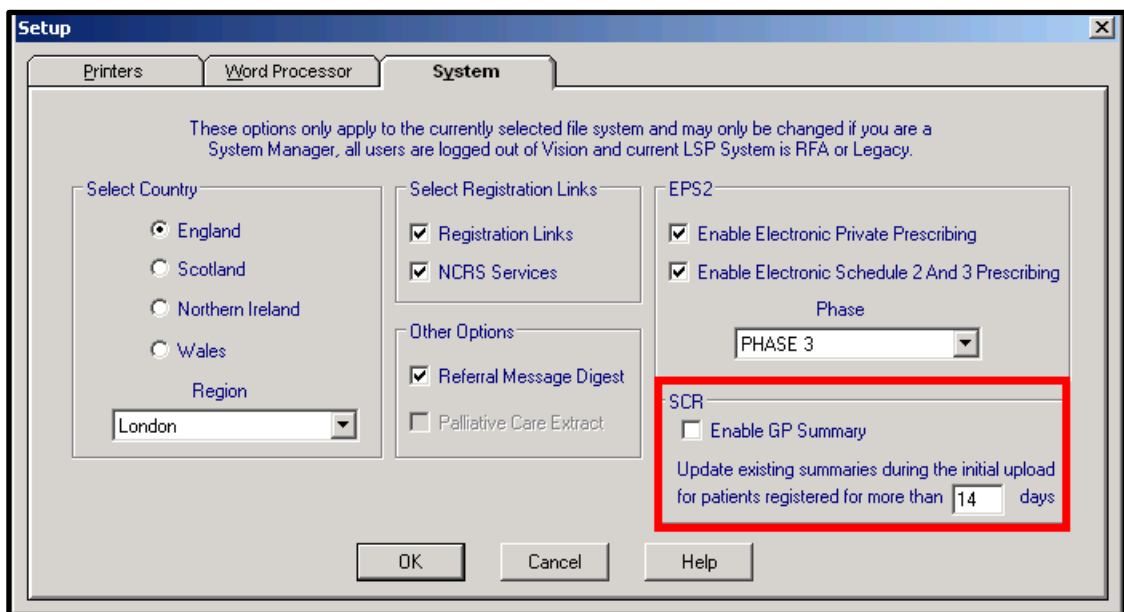
SCR functionality is now enabled/disabled from the Vision front screen via **Options - Setup - System**:

To enable/disable GP Summaries you must:

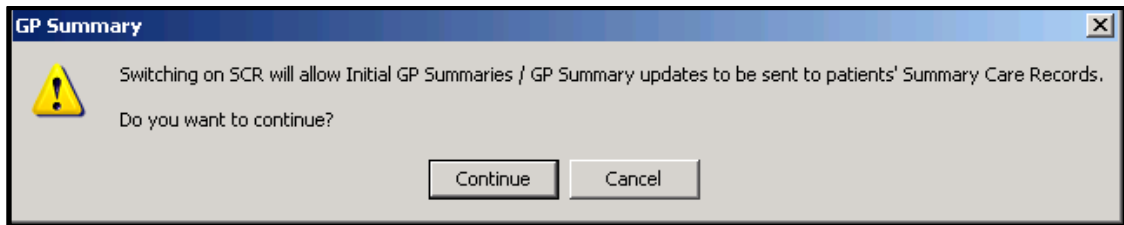
- You must have RBAC fully enabled at the Practice.
- Have **RBAC business function B0062 - Switching GP Summary on or off**.
- Be a **SYSTEM ADMINISTRATOR**.
- Make sure all other users must be logged out of Vision.
- You must also have permission from your CCG to enable SCR functionality.

Enabling SCR

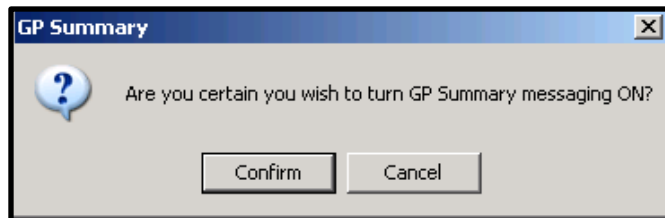
- 1.** From the Vision front screen go to **Options - Setup**.
- 2.** Select the **System** tab.
- 3.** Tick **Enable GP Summary**.



- 4.** Set how long, in days, a patient must have been registered with the practice for the initial upload to overwrite any pre-existing summary with fresh data. The default is 14 days but you can choose between 0-99 days, type the required number of days for the statement "**Update existing summaries during the initial upload for patients registered for more than *nn* days**".
- 5.** Select **OK**.
- 6.** You are prompted "*Switching on SCR will allow Initial GP Summaries/GP Summary updates to be sent to patients' Summary Care Records. Do you want to continue?*" select **Continue**.



7. You are then prompted "Are you certain you wish to turn GP Summary messaging ON?" select **Confirm**.

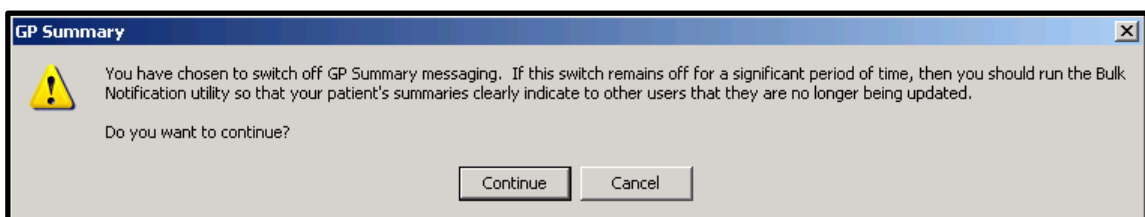


8. You must now log out of Vision for the change to take effect.
9. When you log back in, you are now ready to start your Consent Migration then the initial upload.

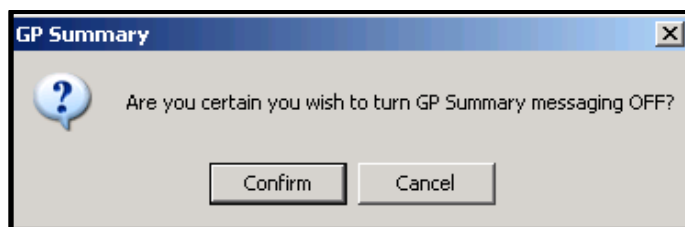
Switching Off SCR

You may need to disable your SCR's functionality, for example, if your practice splits or merges with another practice, or you are having technical problems. Switching off SCR means that the existing patient's summaries are not updated. You should only use this functionality in extreme circumstances and ensure you have fully understood the implications before using it. Disabling SCR has a potential impact on the care your patients receive and it is possible that all patients should be written to, to confirm the practice is no longer updating their SCR. Once disabled, a "Practice No Longer Contributing to SCR" update should be run to add a message to the patient's summaries that the practice is no longer updating their SCR. See Practice No Longer Contributing to SCR

1. From the Vision front screen go to **Options - Setup**.
2. Select the **System** tab.
3. Remove the tick from **Enable GP Summary**.
4. Select **OK**.
5. You are prompted "You have chosen to switch off GP Summary messaging. If this switch remains off for a significant period of time, then you should run the Bulk Notification utility so that your patient's summaries clearly indicate to other users that they are no longer being updated. Do you want to continue? Select **Continue**.



6. You are then prompted "Are you certain you wish to turn GP Summary messaging OFF?" Select **Confirm**.



7. SCR is now turned off. You must now log out of Vision for the change to take effect.
8. When you log back in, you must now run the "Practice No Longer Contributing to SCR" update. See Practice No Longer Contributing to SCR

Overview of Patient Consent

Patients can opt to have a Summary Care Record on the Spine (they can choose to have just allergies and medication or allergies, medication and additional data), or can choose not to have an SCR. This must be recorded on the patient record (see Recording SCR Consent Preference). For patients without any consent preference, implied consent is assumed and medication and allergies are uploaded. All local consent preferences are uploaded to the Spine (Access Control Service - ACS) when the Consent Migration upload is run.

Overview of Managing the Summary

- The patient National Summary is accessible from the **Summary** Menu in **Consultation Manager**.
- The patient consent preference is stored locally (in Vision) and dissent is also stored on the Spine (ACS).
- If the patient consents to core data only, the Summary automatically contains current Repeat Medication, repeat medication discontinued in the last 6 months, acute prescription in the last 12 months, allergies, adverse reactions and intolerances.
- For patients who consent to core data and additional information, the summary automatically contains the core data and additional information Items. Additional information includes active problems, problems linked to medication, priority 1 medical histories, all immunisations. See [Additional Information](#) (page 68) for full details. Some sensitive data is excluded from the National summary, eg information pertaining to sexually transmitted diseases. These items are automatically withheld and are not sent to the Spine. See [Withheld Data](#) (page 69) for full details.
- Data that is automatically added cannot be manually withheld from the National Summary. However, data that has been automatically withheld can be manually added, if relevant and sent to the Spine.
- The National Summary is automatically updated when new data is added to the patient record in accordance with the patient's consent preference. This update is automatically sent to the Spine when the patient's record is deselected.
- You can maintain a local summary in Consultation Manager for patients who have dissented from the SCR scheme, this is not sent to the Spine.

GP Summary Bulk Transmissions

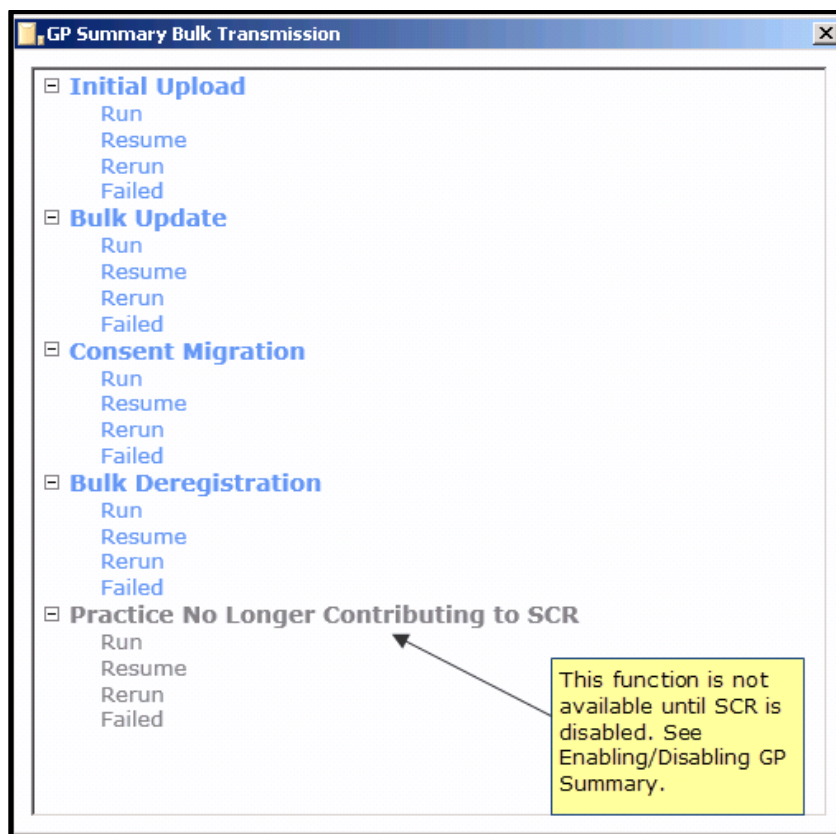
This utility provides the tools required to enable you to send consent preferences and National Summary updates to the Spine as a bulk operation.

GP Summary Bulk Uploads



From **Vision - SCR - GP Summary Bulk uploads**, you can now select one of the following five options:

- *Initial UpLoad* (page 15) - This upload is a one-off process, which compiles an Initial National Summary for each eligible non-dissenting patient registered at your practice. This should be run at a time agreed with your CCG.
- *Bulk Update* (page 22) - A new option which can be run if a large number of patients require their GP summary refreshing.
- *Consent Migration* (page 25) - A new option which uploads patient SCR consent status from Vision to the Spine and processes some local changes to patient's consent.
- *Bulk Deregistration* (page 28) - A new function to send an update summary and additional message when a group of patients leave the practice, ie when a practice splits.
- *Practice No Longer Contributing to SCR* (page 31) - This new function enables you to send an update summary and additional text when the SCR function is disabled/switched off, for example when a practice closes. This upload is inactive until the SCR function is switched off, the upload then activates and can be run. See *Enabling/Disabling GP Summary* (page 10)



Note - You must be a **System Administrator** with the RBAC role **B0062 - Schedule, manually start, manually stop and manually restart bulk uploads, including the initial upload**, and be logged in with your Smartcard to run the SCR bulk transmissions uploads. Once an upload is running you can remove your Smartcard, however, the 10 hour rule still applies.

Initial Upload

The Initial Upload should be run once SCR has been enabled. See [Enabling/Disabling GP Summary](#) (page 10) You are notified of your commencement date by your CCG. Before running the Initial Upload you should run Consent Migration to upload patients consent status to the Spine (ACS). See [Consent Migration](#) (page 25)

The Initial Upload compiles an Initial National Summary for each eligible non-dissenting patient registered at your practice. See [Who is eligible?](#) (page 16) The Initial Upload is a one-off process that can be run in its entirety to completion, or be paused and resumed as many times as necessary.

Note - The **Initial Upload** can be run on any workstation (apart from the EDI machine). All users can operate Vision normally during the upload.

The initial upload only uploads initial National Summary messages containing core data only for eligible patients. Although it is possible to re-run the initial upload (Vision skips patients who already have an initial upload message), it is probably best to check your system for any patients who might have **erroneous FP69** and/or **erroneous applied status** before the primary initial upload is run.

Who is eligible?

The patients included in the Initial Upload process are those who:

- Are permanently registered with the practice (excluding applied for registration) at the point SCR was enabled.
- Have a new style NHS number.
- Do not have a current National Summary record (when a patient registers, a current GP summary is retrieved if they already have a National Summary.)
- Patients with an FP69 flag are not included in the Initial Upload process.
- Patients must be at least partially synchronised with PDS to be eligible (see [SCR PDS Synchronisation](#) (page 55)).

Note - patients who have expressed dissent are NOT included in the Initial Upload process.

Patients who are not permanent at the point of SCR switch on are not included in the initial upload but once "Permanent" a summary is automatically created or updated when they are next selected. See [New Permanently Registered Patients](#) (page 86) for further details

What information is sent in the Initial Upload?

The Initial Upload contains core data only.

Note - Consent status is checked during the Initial Upload but is not sent to the Spine.

Core Data

Only Core Data is included in the Initial Upload. Patients who consent to additional information have an Initial Summary containing core data only. Their summary is updated automatically to include the additional information when the patient's record is next accessed, for example, next time they see a clinician or next issue of a prescription.

Note - Patients with dissent recorded "9Ndo.00 Express Dissent for Core Summary Care Record Data Set Upload", are excluded from the Initial Upload.

The following clinical information is known as Core Data (patient with the following):

- **Current Repeat Medication** - All active repeat medication which has not been discontinued in the last 6 months. If there is a Repeat Until Date specified, then this date must be in the future or within the last 6 months. If there is no Repeat Until Date, then the number of issues must be less than the maximum or the last issued must have been made within the last 6 months.

Inactive Repeats from GP2GP messages are NOT included in the SCR core data upload.

Current Repeat Medication - Discontinued Repeat Medication - A discontinued repeat master is included in the SCR message if it was discontinued in the last six month.

Current Acute Medication - all acute medication prescribed in the last 12 months excluding repeat issues.

OTC (Over The Counter) drugs and items prescribed elsewhere (i.e. hospital) is included in all of the drug categories.

- **Allergies and Intolerances** include suspected adverse reactions and allergies including allergies to drugs, foods and any other substances (this includes Allergies entered through the Allergies and Intolerances SDA and also Read coded allergies).

Note - Negative allergy entries are not sent as part of the SCR.

Note - If the patient's record does not contain one or any of the above data categories, the category description is uploaded as part of the summary stating "No relevant information available for this category."

Running the Initial Upload

Points to note for all practices before running the Initial Upload:

- Your Smartcard is required to run the Initial Upload, you can log out of Vision and remove your Smartcard if you wish, but the automatic 10 hour shutdown process applies. The upload process can be stopped and resumed as required.
- You must be a **System Administrator** with the RBAC role **B0062 - Schedule, manually start, manually stop and manually restart bulk uploads, including the initial upload.**

For AEROS practices, please make sure that you run your Initial Upload at the specific time allocated to you by the team. Also, **it is vital that you DO NOT terminate your session on the machine running the Initial Upload whilst the Initial Upload is still in process.**

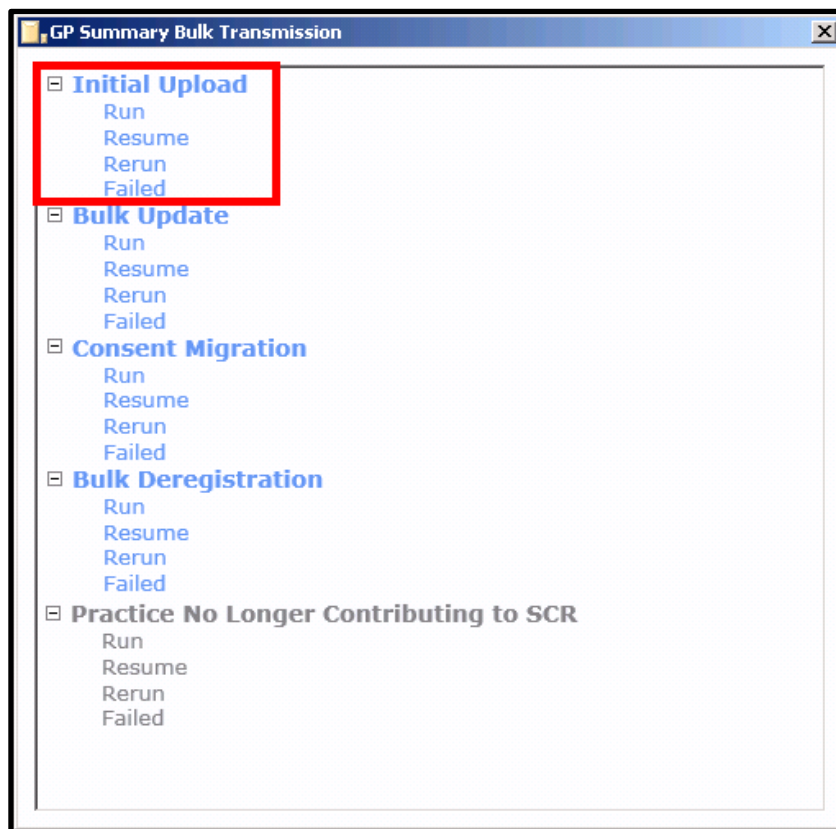
From the Initial Upload menu, you can choose to Run, Resume, Re-run and resend Failed transmissions:

- 1.** From the Vision front screen, go to the **SCR** tab.

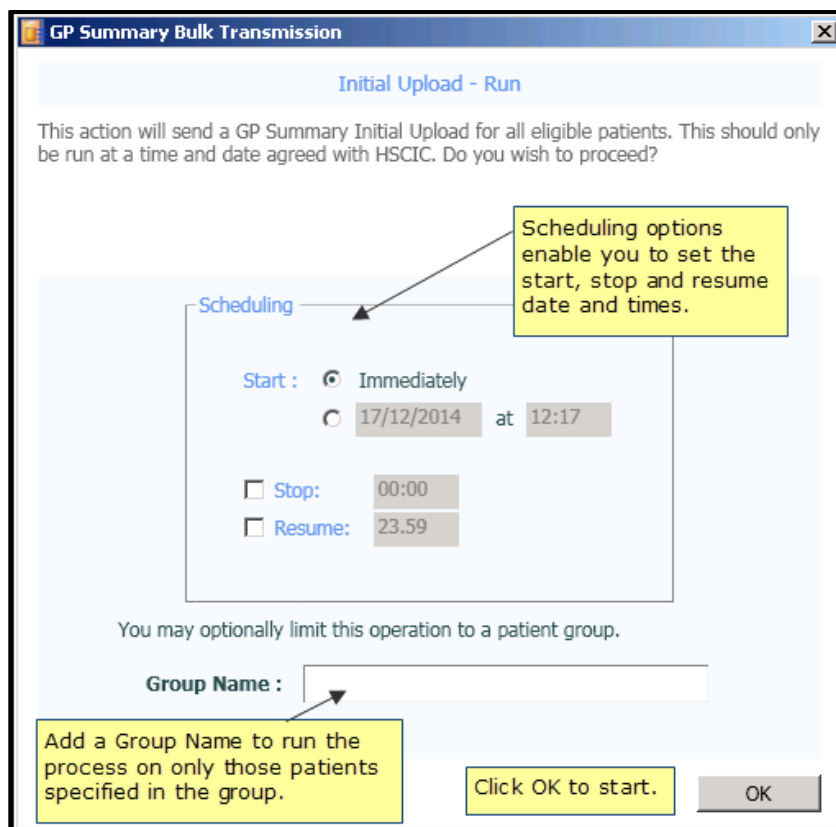


- 2.** Select **GP Summary Bulk Uploads**.
- 3.** The GP Summary Bulk Transmission screen displays.
- 4.** From the Initial Upload menu, you now have the following options:

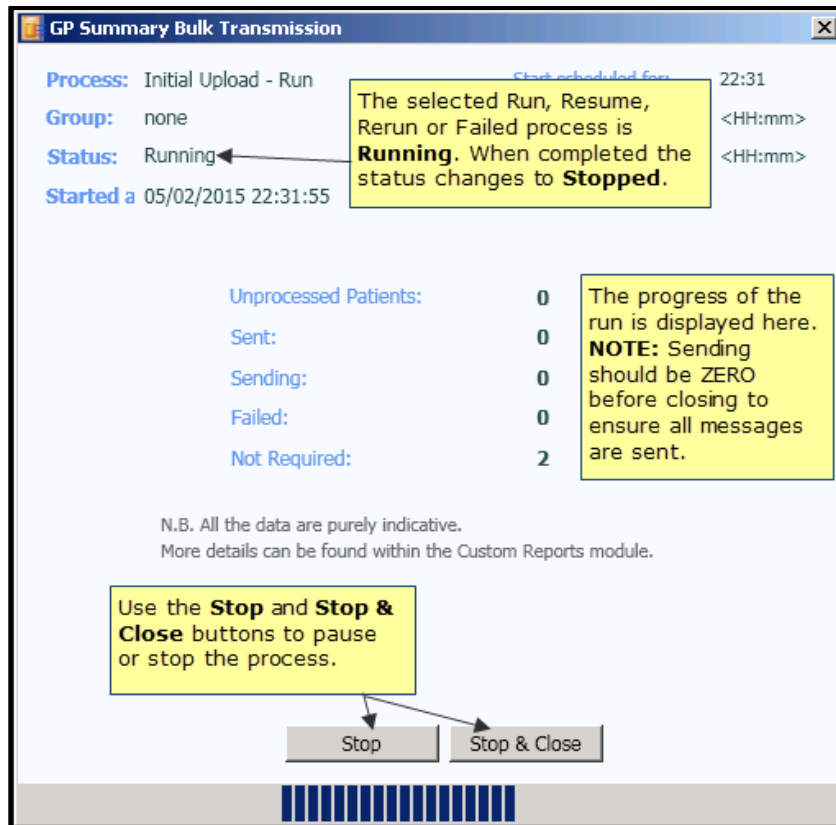
- **Run** - This action sends a GP Summary Initial Upload for all eligible patients. This should only be run at a time and date agreed with HSCIC. Do you wish to proceed?
- **Resume** - Continue with the initial upload?
- **Rerun** - Some Initial Uploads have already been sent. This operation resends messages for all eligible patients. Do you wish to proceed?
- **Failed** - This action reprocesses all failed initial uploads. Do you wish to proceed?



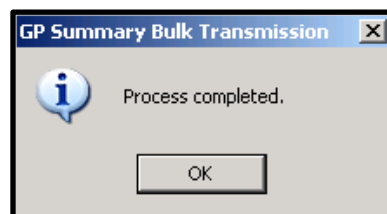
5. Select required option, for example, **Run**.




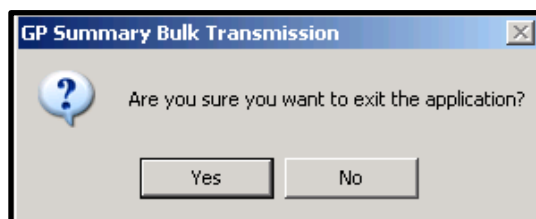
- 6.** To start the process immediately, Select **OK**. Or set an alternate start, stop or resume time, add the required details. See [Scheduling Options](#) (page 35).
- 7.** If you need to run the process on certain patients only you can use **Group Name**, see [Patient Group Option](#) (page 35) for further details.
- 8.** Select **OK** to start the process. Once running if you need to pause or stop the process, use the two buttons available at the bottom of the screen. See [How to Stop or Pause the Running Process](#) (page 36) for further details.



9. When completed the Status changes to **Stopped**. You are prompted "Process completed." select **OK**. See [Upload Completed/Finished](#) (page 37).



10. Use **Stop & Close**, to exit to the GP Summary Bulk Transmission screen to select another process, or select the cross  in the top right to exit the module, you are prompted "Are you sure you want to exit the application?" . Select **Yes**.



Restarting the Initial Upload

When you are ready to restart the Initial Upload after pausing, Vision picks up from where it left off:

1. On the front screen of Vision, Select **SCR – GP Summary Bulk Uploads**



2. The **GP Summary Bulk Transmission** window appears.
3. Double select on **Initial Upload – Resume**, you are prompted "*Continue with the initial upload?*"
4. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details, then select **OK**. See [Scheduling Options](#) (page 35).

Re-running the Initial Upload

If the Initial Upload has already run to completion and you can run it again using the Initial Upload - Rerun process. This sends an Initial Upload for all active patients who are eligible.

If you want to reprocess patients whose previous Initial Upload failed, use the Failed utility rather than rerun the whole process again. See [Reprocess Failed Initial Uploads](#) (page 21)

Note - Even though the Initial Upload is intended as a one-off process, if you find that a percentage of your patients have not uploaded, you can re-run the upload as previously. See [Running the Bulk Initial Upload](#) (page 17).

To rerun the Initial Upload for all active patients:

1. On the front screen of Vision, Select **SCR – GP Summary Bulk Uploads**



2. The **GP Summary Bulk Transmission** window appears.
3. Double click on **Initial Upload – Rerun**, you are prompted "*Some Initial Uploads have already been sent. This operation will resend messages for all eligible patients. Do you wish to proceed?*"
4. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details, then select **OK**. See [Scheduling Options](#) (page 35).

Reprocess Failed Initial Uploads

If during the previous run of the Initial Upload some patient uploads failed, these can be reprocessed using the Initial Upload - Failed process.

Prior to this run the SCR Reporter Initial Upload report which identifies failed patients, you can create a group of these patients and check their records and resolve the problem causing the failed process. See [Initial Upload Report](#) (page 40)

To run the failed process:

1. On the front screen of Vision, Select **SCR – GP Summary Bulk Uploads**



2. The **GP Summary Bulk Transmission** window appears.
3. Double click on **Initial Upload – Failed**, you are prompted "*This action will reprocess all failed initial uploads. Do you wish to proceed?*"
4. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details, then select **OK**. See [Scheduling Options](#) (page 35).

New patients

If a new patient is made permanent before the **Initial Upload** is completed, but after SCR functionality has been enabled, they are not included in the Initial Upload.

Bulk Update

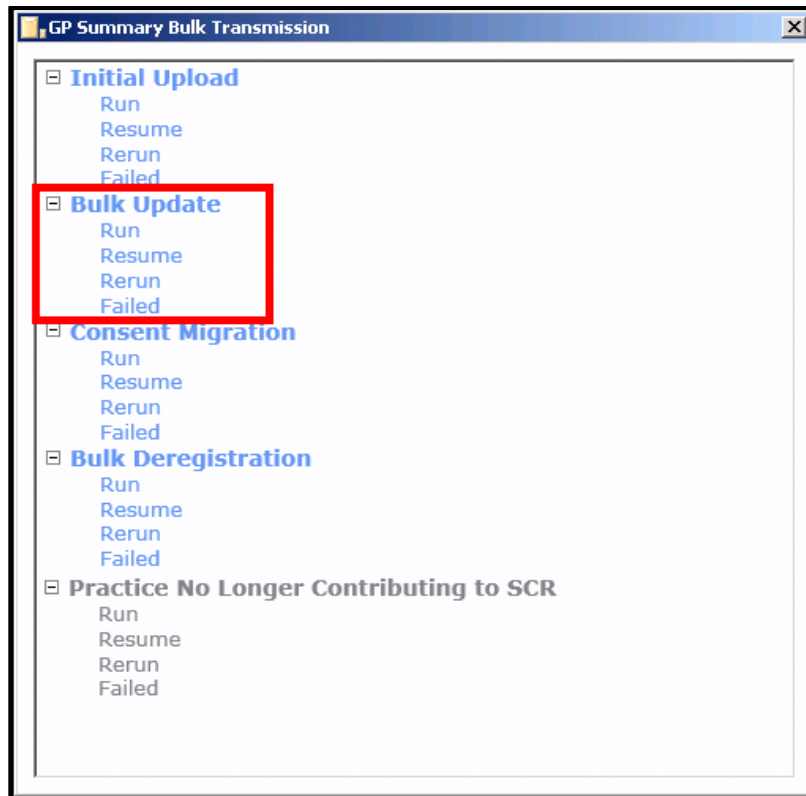
New tools have been added to enable you to send up to date SCRs in bulk to the Spine. This is useful, for example, if a large number of patients need a refresh of their existing SCR.

To run the Bulk Update utility:

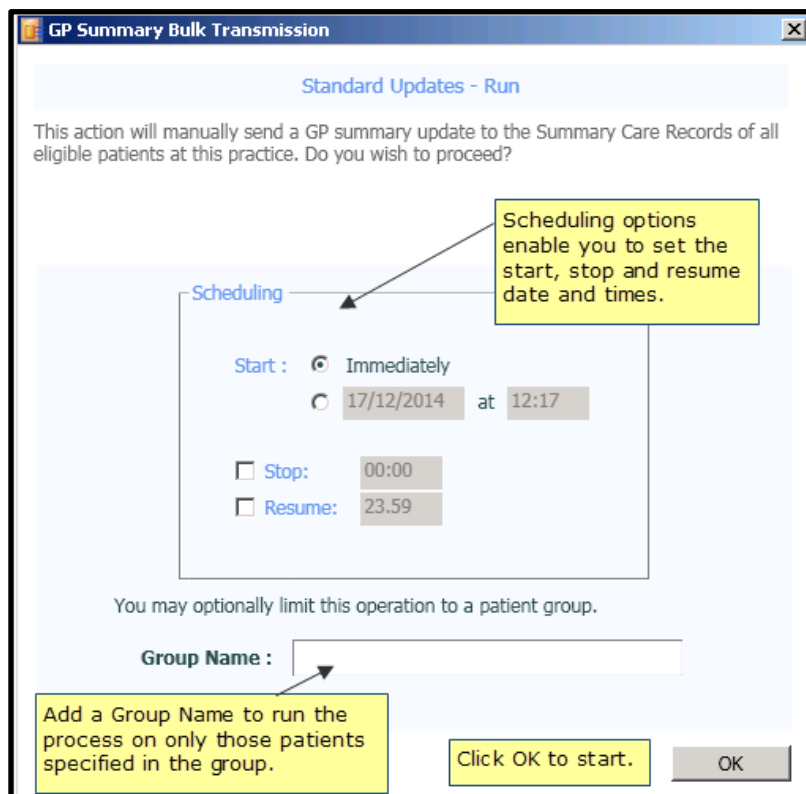
1. Go to **Vision Front Screen - SCR - GP Summary Bulk Uploads**



2. The GP Summary Bulk Transmission screen displays.
3. From the Bulk Update menu, you now have the following options:
 - **Run** - This action manually sends a GP summary update to the Summary Care Records of all eligible patients at this practice. Do you wish to proceed?
 - **Resume** - Continue with the bulk refresh?
 - **Rerun** - This action manually sends a GP summary update to the Summary Care Records of all eligible patients at this practice. Do you wish to proceed?
 - **Failed** - This action reprocesses all failed updates from the previous bulk refresh. Do you wish to proceed?



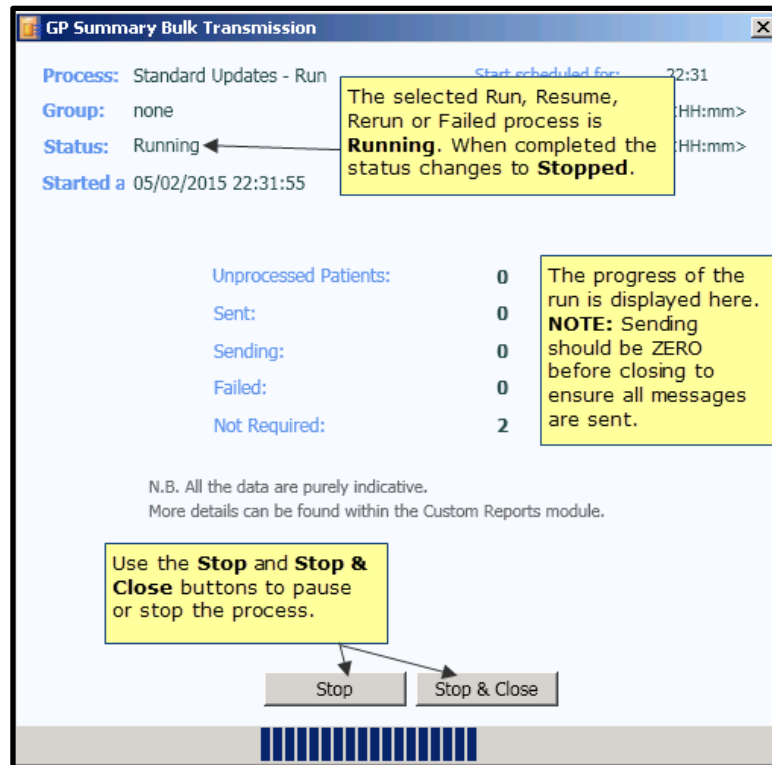
4. Select the required option, for example, **Run**.



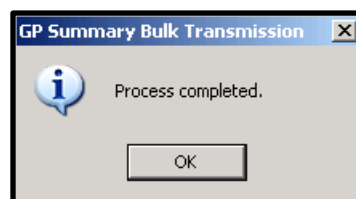
5. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details. See *Scheduling Options* (page 35).


6. If you need to run the process on certain patients only you can use **Group Name**, see *Patient Group Option* (page 35) for further details.

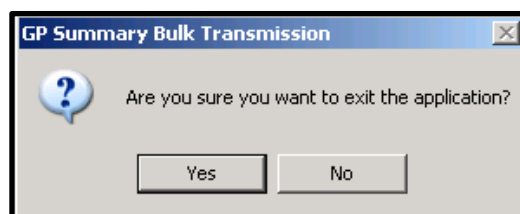
7. Select **OK** to start the process. Once running if you need to pause or stop the process, use the two buttons available at the bottom of the screen. See [How to Stop or Pause the Running Process](#) (page 36) for further details.



8. When completed the Status changes to **Stopped**. You are prompted "Process completed." select **OK**. See [Upload Completed/Finished](#) (page 37).



9. Use **Stop & Close**, to exit to the GP Summary Bulk Transmission screen to select another process, or select the cross  in the top right to exit the module, you are prompted "Are you sure you want to exit the application?" Select **Yes**.



Consent Migration

This process should be run on your SCR go-live day or for existing practices immediately following installation of DLM 483. The Consent Migration upload sends all dissenting preferences stored in Vision to the Spine. It also performs the following changes to the local record:

- Change legacy Read codes to the New Codes.
- For patients with an existing SCR on the Spine, but no consent record locally, Implied Consent **9Ndl. Implied consent for core Summary Care Record dataset upload** is added.

Note - For patients with 'Dissent' recorded on the Spine but not in Vision, no ACS upload is sent. When next selected in Consultation Manager the patient has an ACS mismatch. This must be resolved to ensure no SCR updates are sent for dissenting patients.

Patients with no existing SCR on the Spine and no consent preference specified by the patient, Vision assumes implied consent. This displays in the local record as "*No Preference Expressed*". The patients SCR contains Core data only.

The patients consent is then checked each time the patient is selected in Consultation Manager as part of the patient synchronisation criteria. If the patient has dissented, but there are differences between the spine and the local record, an ACS mismatch message displays and must be resolved.

Patients with the original legacy Read codes for consent, used in the initial version of SCR, are converted to the new codes during the Consent Migration process the new dissent Read codes are then updated to the ACS.

The details are:

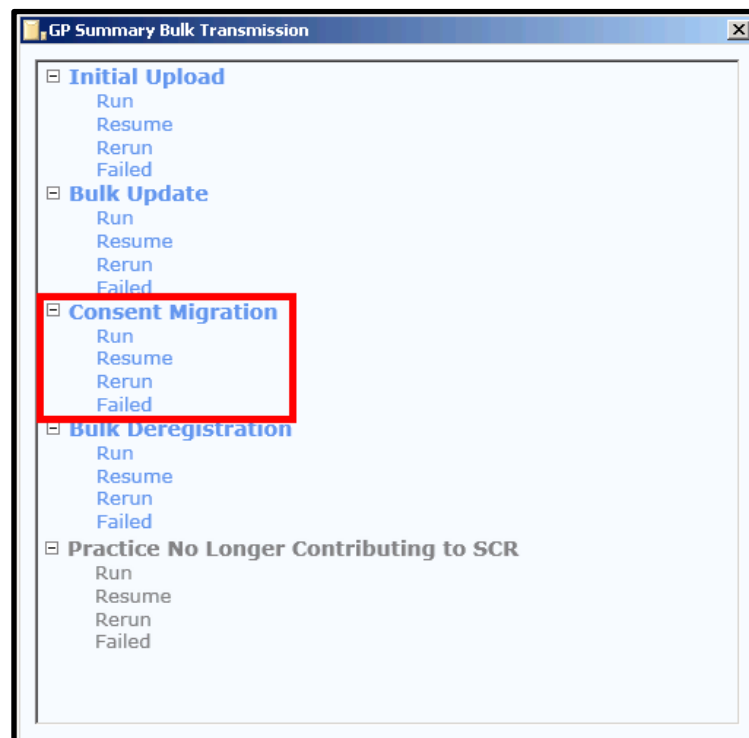
Consent Status	Local Legacy Read Code	New Read Code following Migration
Legacy Dissent	93C3. Refused consent for upload to national shar electronic rec	9Ndo. Express dissent for Summary Care Record dataset upload
Legacy Consent	93C2. Consent given for upload to national shared electronic rec	9Ndn. Express consent for core and additional SCR dataset upload

Running Consent Migration

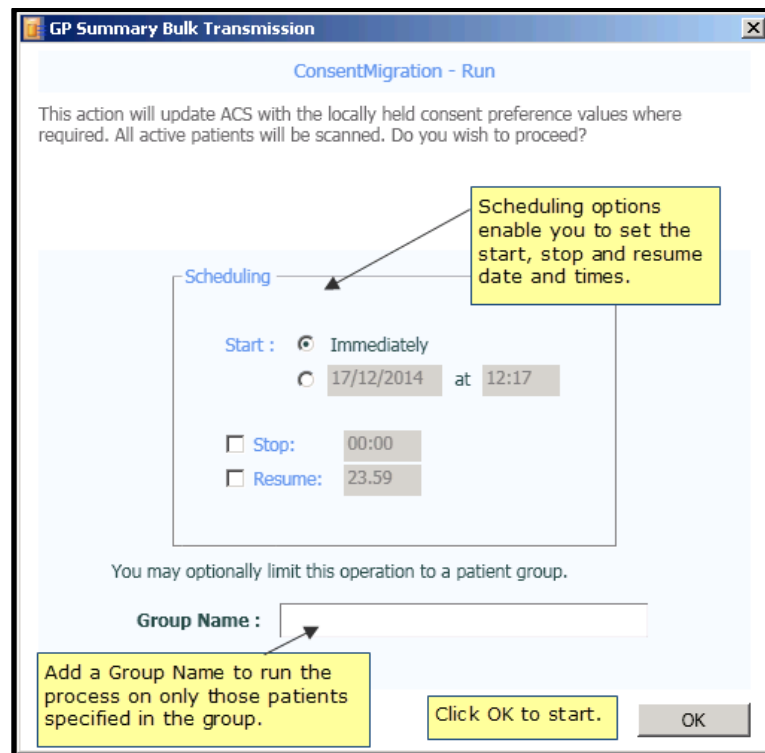
To run the Consent Migration utility:



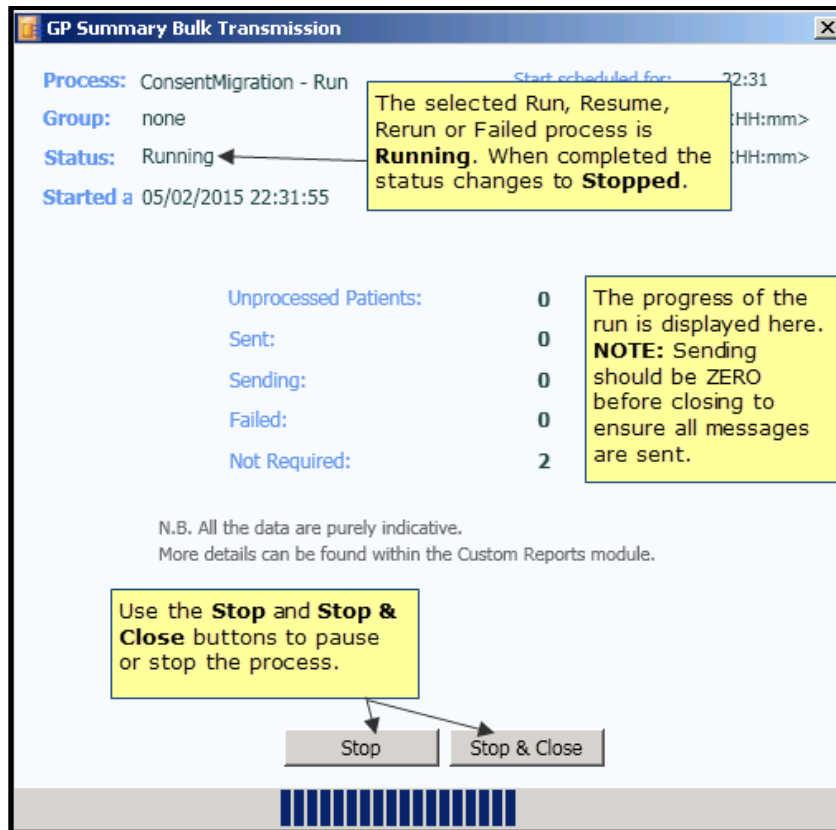
- 1.** Go to **Vision Front Screen - SCR - GP Summary Bulk Uploads**
- 2.** The GP Summary Bulk Transmission screen displays.
- 3.** From the Consent Migration menu, you now have the following options:
 - **Run** - This action updates ACS with the locally held consent preference values where required. All active patients are scanned. Do you wish to proceed?
 - **Resume** - Continue with Consent Migration?
 - **Rerun** - This action updates ACS with the locally held consent preference values where required. All active patients are scanned. Do you wish to proceed?
 - **Failed** - This action reprocesses all failed consent migrations from the previous attempt. Do you wish to proceed?



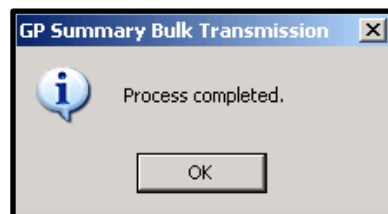
- 4.** Double click to select the required option, for example, **Run**.




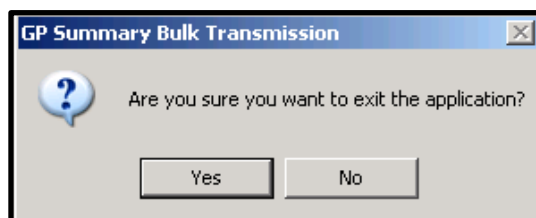
- 5.** To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details. See [Scheduling Options](#) (page 35).
- 6.** If you need to run the process on certain patients only you can use **Group Name**, see [Patient Group Option](#) (page 35) for further details.
- 7.** Select **OK** to start the process. Once running if you need to pause or stop the process, use the two buttons available at the bottom of the screen. See [How to Stop or Pause the Running Process](#) (page 36) for further details.



8. When completed the Status changes to **Stopped**. You are prompted "Process completed." select **OK**. See [Upload Completed/Finished](#) (page 37).



9. Use **Stop & Close**, to exit to the GP Summary Bulk Transmission screen to select another process, or select **Close**  in the top right to exit the module, you are prompted "Are you sure you want to exit the application?" . select **Yes**.



Bulk Deregistration

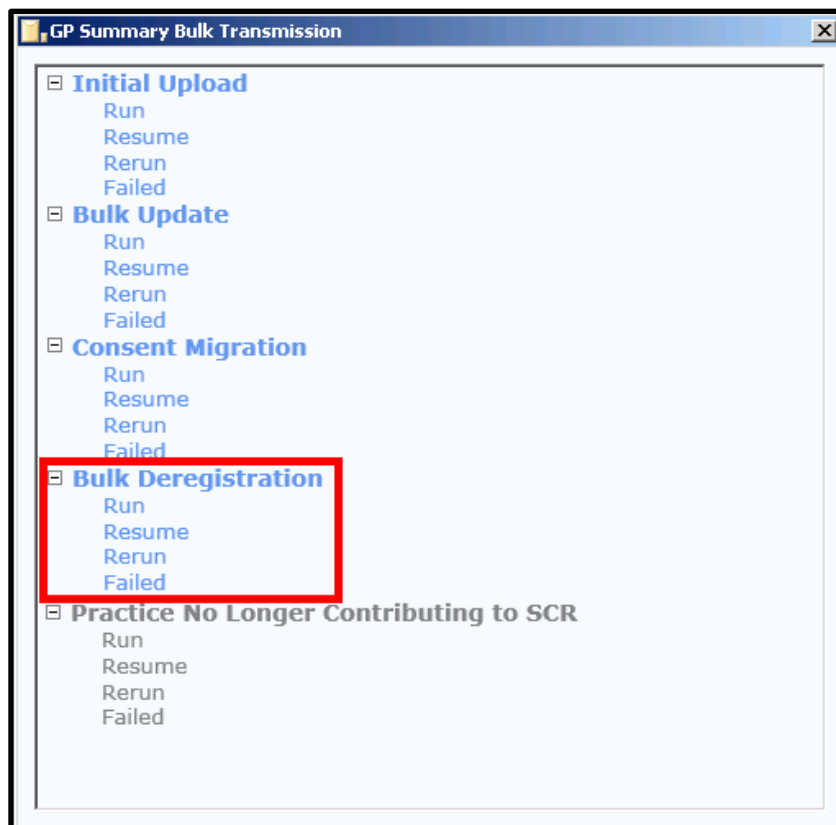
This new functionality sends a de-registration SCR update for multiple patients. You need to identify the patients who are being transferred out following a practice split, then create a group of those patients. This group is then used when running this update. An updated SCR is sent to the Spine with additional text indicating that the practice has split and the patients are no longer registered.

Note - Patient group is mandatory for this update.

To run the Bulk De-registration utility:



- 1.** Go to **Vision Front Screen - SCR - GP Summary Bulk Uploads**
- 2.** The GP Summary Bulk Transmission screen displays.
- 3.** From the Bulk De-registration menu, you now have the following options:
 - **Run** - This action manually sends a GP summary update to the Summary Care Records for all patients in the specified patient group. Each update is annotated to indicate that the patient's is no longer registered at this practice. Do you wish to proceed?
 - **Resume** - Continue with No Longer Registered Notification?
 - **Rerun** - This action manually sends a GP summary update to the Summary Care Records for all patients in the specified patient group. Each update is annotated to indicate that the patient is no longer registered at this practice. Do you wish to proceed?
 - **Failed** - This action reprocesses all failed updates from the previous 'No Longer Registered' update. Do you wish to proceed?



4. Select the required option, for example **Run**.

GP Summary Bulk Transmission

Bulk Deregistration - Run

This action will manually send a GP summary update to the Summary Care Records for all patients in the specified patient group. Each update will be annotated to indicate that the patient's is no longer registered at this practice. Do you wish to proceed?

Scheduling

Start : Immediately
 17/12/2014 at 12:17

Stop: 00:00
 Resume: 23.59

You may optionally limit this operation to a patient group.

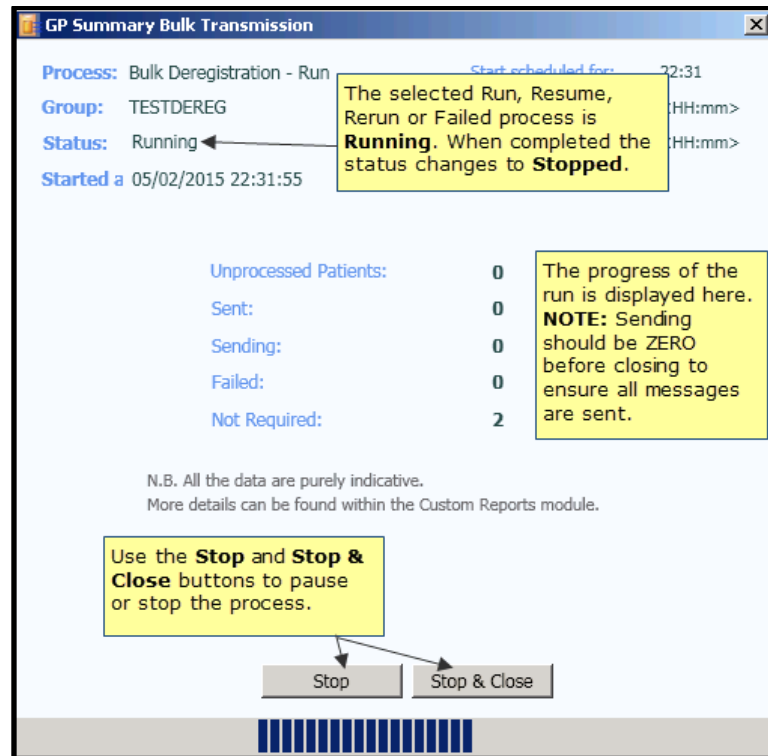
Group Name :

Click OK to start.

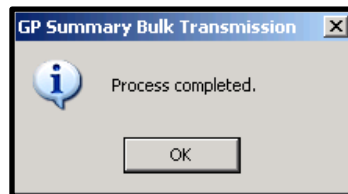
Scheduling options enable you to set the start, stop and resume date and times.


Add a Group Name to run the process on only those patients specified in the group.

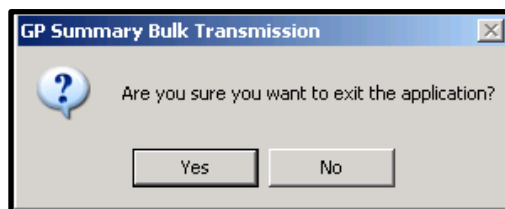
5. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details. See [Scheduling Options](#) (page 35).
6. If you need to run the process on certain patients only you can use **Group Name**, see [Patient Group Option](#) (page 35) for further details.
7. Select **OK** to start the process. Once running if you need to pause or stop the process, use the two buttons available at the bottom of the screen. See [How to Stop or Pause the Running Process](#) (page 36) for further details.



- 8.** When completed the Status changes to **Stopped**. You are prompted "Process completed." select **OK**. See [Upload Completed/Finished](#) (page 37).



- 9.** Use **Stop & Close**, to exit to the GP Summary Bulk Transmission screen to select another process, or select **Close**  in the top right to exit the module, you are prompted "Are you sure you want to exit the application?" . Select **Yes**.



Practice No Longer Contributing to SCR

For practices who are closing and no longer be contributing to SCR, this new function enables you to bulk send a GP Summary update for all qualifying patients at the practice with an additional message indicating that the practice is no longer contributing to SCR. This can only be run once the SCR function is disabled/switched off. See [Enabling/Disabling GP Summary](#) (page 10)

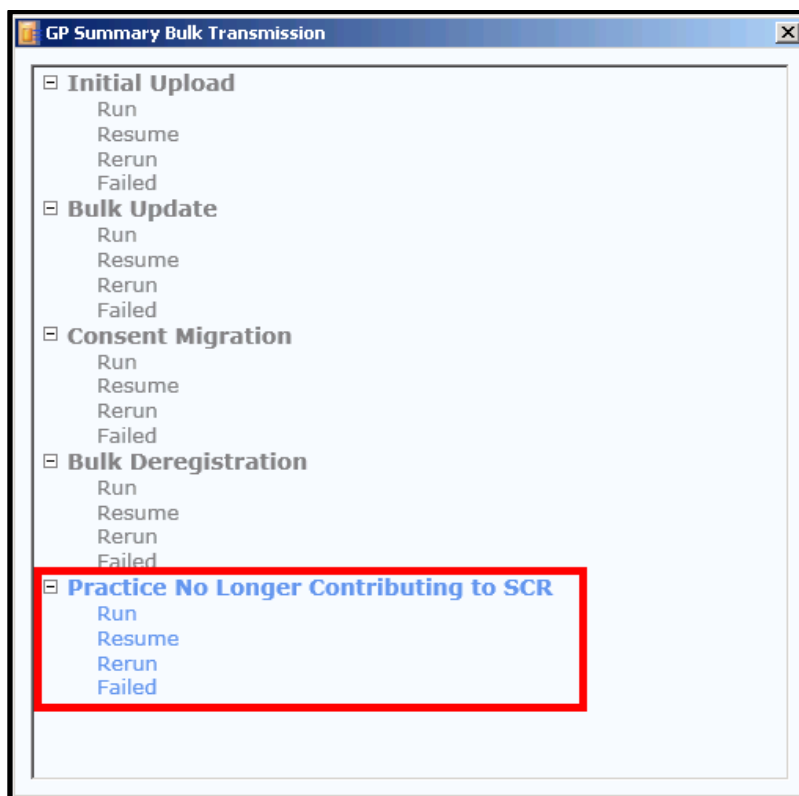
Note - Once SYS has disabled SCR, login with a smart card to access GP Summary Bulk Transmission - Practice No Longer Contributing to SCR.

Disabling SCR functionality should only be used in extreme circumstances and you should ensure that you have fully understood the implications before disabling it. Switching off SCR has a potential impact on the care your patients receive and it is possible that all patients should be written to, to confirm the practice is no longer updating their SCR.

To run the Practice No Longer Contributing to SCR utility:

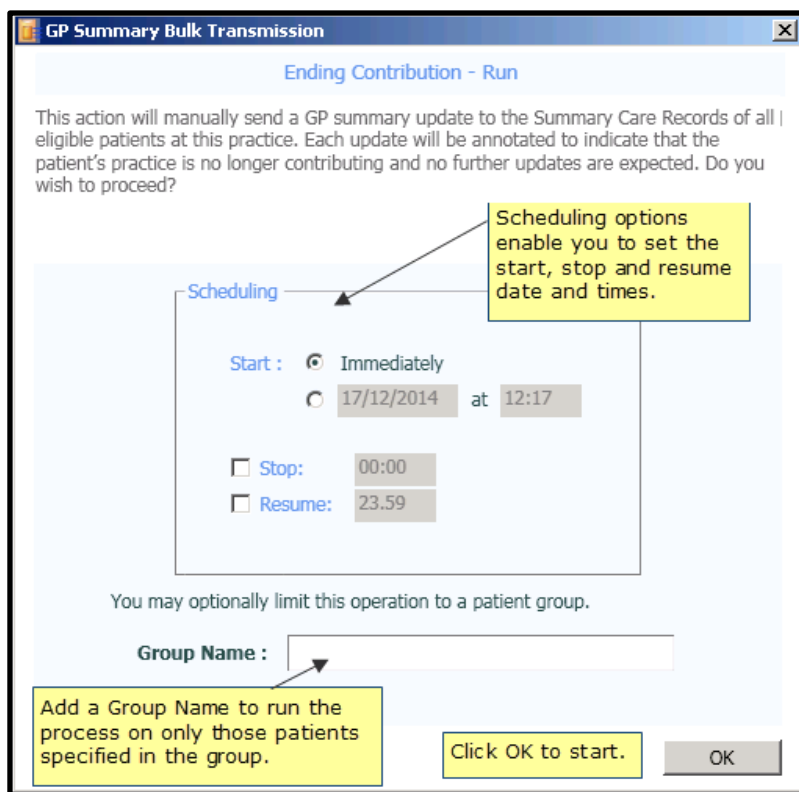


- 1.** Go to **Vision Front Screen - SCR - GP Summary Bulk Uploads**
- 2.** The GP Summary Bulk Transmission screen displays.
- 3.** From the Practice No Longer Contributing to SCR menu, you now have the following options:
 - **Run** - This action manually sends a GP summary update to the Summary Care Records of all eligible patients at this practice. Each update is annotated to indicate that the patient's practice is no longer contributing and no further updates are expected. Do you wish to proceed?
 - **Resume** - Continue with Ending Contribution Notification?
 - **Rerun** - This action manually sends a GP summary update to the Summary Care Records of all eligible patients at this practice. Each update is annotated to indicate that the patient's practice is no longer contributing and no further updates are expected. Do you wish to proceed?
 - **Failed** - This action reprocesses all failed updates from the previous 'No Longer Registered' update. Do you wish to proceed?



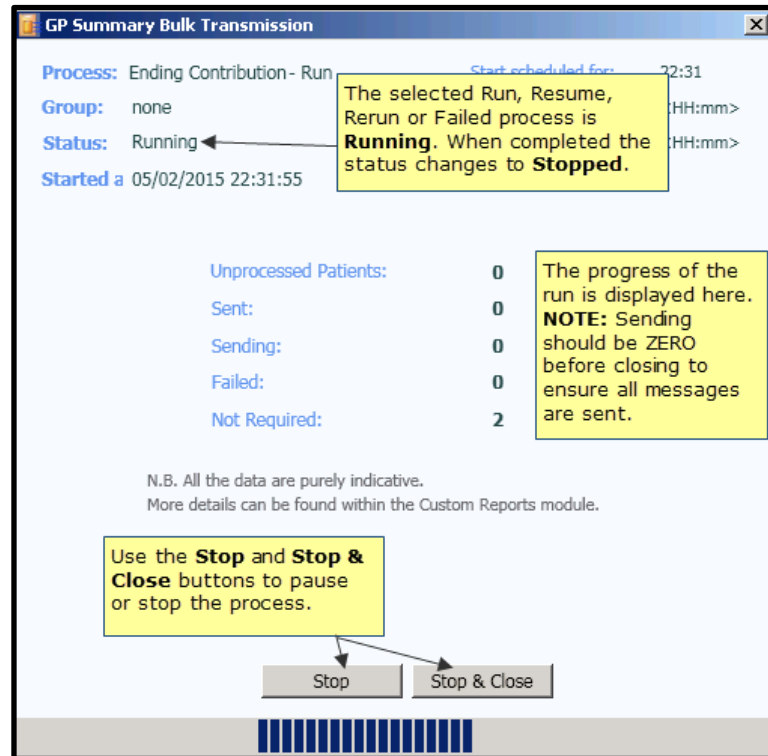
Note - This function is not available until SCR has been disabled. See [Enabling/Disabling GP Summary](#) (page 10).

4. Select the required option, for example **Run**.

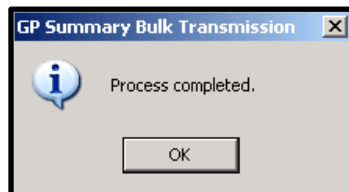



5. To start the process immediately, select **OK**. Or set an alternate start, stop or resume time, add the required details. See [Scheduling Options](#) (page 35).

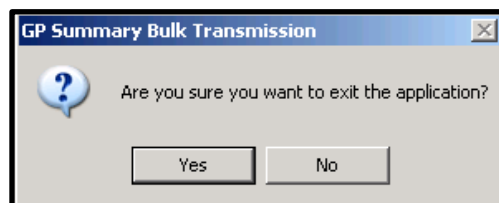
6. If you need to run the process on certain patients only you can use **Group Name**, see [Patient Group Option](#) (page 35) for further details.
7. Select **OK** to start the process. Once running if you need to pause or stop the process, use the two buttons available at the bottom of the screen. See [How to Stop or Pause the Running Process](#) (page 36) for further details.



8. When completed the Status changes to **Stopped**. You are prompted "Process completed." select **OK**. See [Upload Completed/Finished](#) (page 37).



9. Use **Stop & Close**, to exit to the GP Summary Bulk Transmission screen to select another process, or select the cross  in the top right to exit the module, you are prompted "Are you sure you want to exit the application?" . Select **Yes**.



Upload Options

Scheduling Options

Select from the following options if required:

- **Start** - There are two options:
 - **Immediately** - Starts the run process immediately.
 - **dd/mm/yyyy at hh:mm** - By default this is the current date and time, change to your required start date and time to defer the run.
- **Stop** - By default this is **00:00**, change to a specific time if you want to schedule the run to stop, for example at the start of surgery.
- **Resume** - By default this is **23.59**, change to a specific time if you want to schedule the run to resume, for example, at the end of surgery.


Important - If you schedule start and/or stop times the program must be left running on the workstation. You can remove your Smartcard once the process has started, but the 10 hour rule still applies.

Patient Group Option

If you want to limit which patients are processed during the upload, you can create a patient group and use the group to specify which patients are used for the selected process.

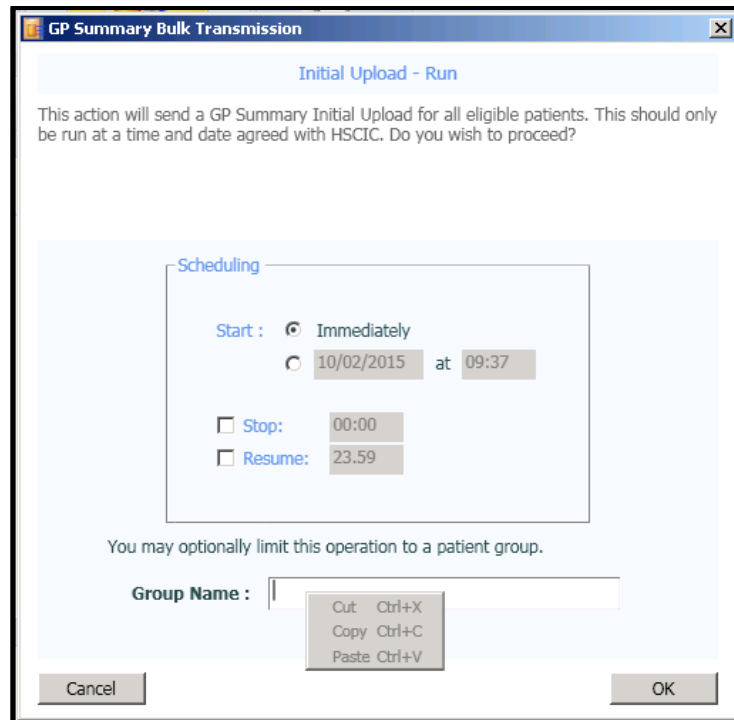
Note - Patient group is mandatory when running the Bulk De-ristration update.

To create a group:

- 1.** Identify the patients required for the upload. This can be done using an existing group in Clinical Audit, or can be created using an Ad-hoc search.
- 2.** To save a Clinical Audit group to Patient Groups, select the Clinical Audit  icon identify required audit line, select **OK** to save.
- 3.** In an Ad-hoc search, create the search to find the required patients, to save to a group double select the Group Output line. You are prompted to add a **Group Name** and **Group Description**.
- 4.** Make a note of the Group Name, this is required in the upload process to identify specific patients.

During the Upload process you can enter the group name:

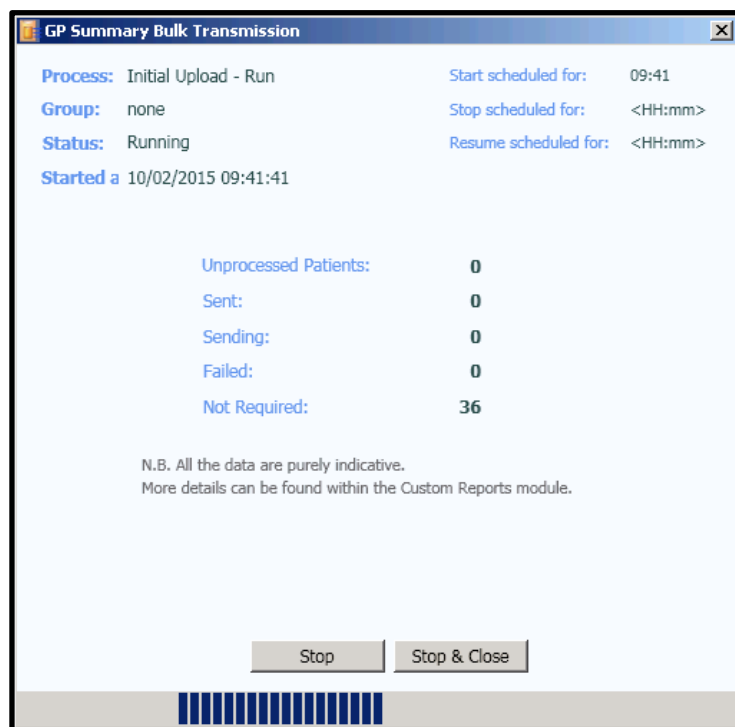
- 1.** Having selected an upload, for example, Initial Upload, then selected the operation required, for example, Run, you can add a group name to specify which patient records are to be uploaded.
- 2.** Type the **Group Name** in the box, for example, DRXPATS. This displays in capitals, or use **CTRL+C** to copy the group name then paste it into the Group Name box using **CTRL+V**. Or right click in the box to access the menu.



3. Select **OK** to start your run/rerun/resume/failed process.


How to Stop or Pause the Running Process

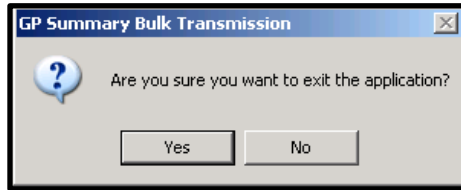
During the Run process, you can stop the upload using one of the following buttons:



- **Stop** - This pauses the run, you then need to use the Stop & Close button to exit the screen.

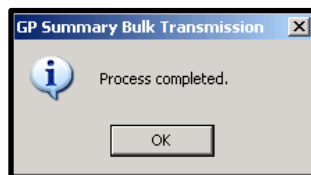
- **Stop & Close** - This stops the run process and exits you to the GP Summary Bulk Transmission screen, where you can choose to run, resume, rerun or process failed messages.

To exit the GP Summary Bulk Transmission screen select **Close**  in the top right, you are prompted "Are you sure you want to exit the application?". Select **Yes**.

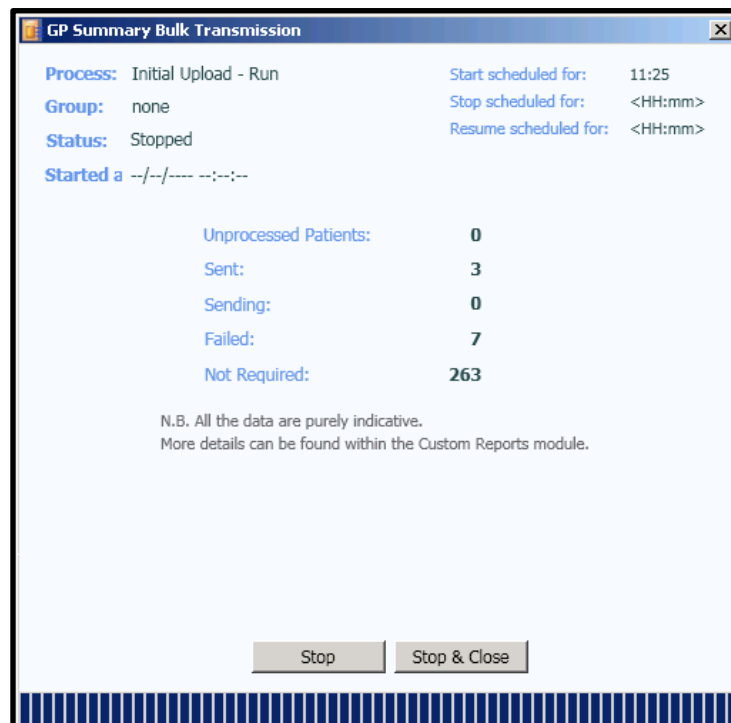


Upload Completed/Finished

When completed, the status is "**Stopped**", you are prompted "Process completed." select **OK**.



The following the results are displayed:



- **Unprocessed Patients** - No processing has been attempted for these patients. This should be zero when the upload has finished.
- **Sent** - Messages/Consent records successfully sent to the Spine.
- **Sending** - In the process of sending. This should be zero when the upload has finished.

- **Failed** - Failed to send the SCR/Consent to the Spine.
- **Not Required** - A SCR/Consent was not required for the patient, for example, they are not eligible for SCR.

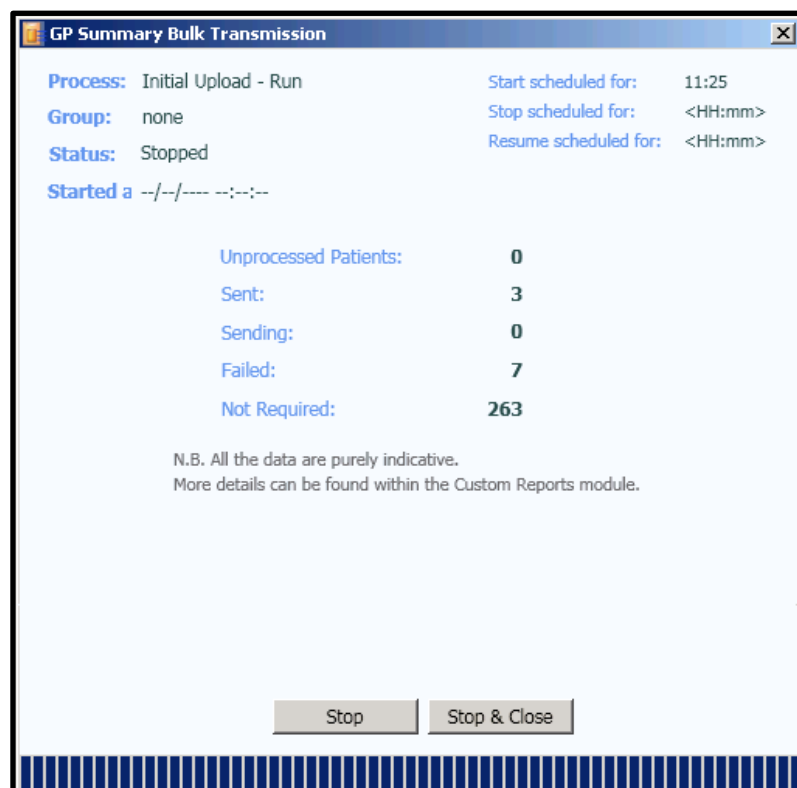
Note - Check that sending is ZERO prior to closing. If a number displays the summaries are in the process of sending, wait for the number to refresh to zero before exiting.

Training TIP - Use the SCR Reporting tools to identify patients who are failed or for reasons why they are in the Not Required group (ie Ineligible patients). See *Ineligible Patients* (page 38) and SCR Reporting Module in the on-screen help for further details.

Once you have checked the failed patients records in SCR Reporter, you can run the failed process for that upload for example,. Initial Upload - Failed.

Ineligible Patients

When the upload is complete there may be some patients identified as **Failed** patients or patients **Not Required**



- **Failed** - Failed to send the SCR/Consent to the Spine.
- **Not Required** - A SCR/Consent was not required for the patient, for example, they are not eligible for SCR.

Patients in these categories may have one of the following reasons for being failed or ineligible:

- An Unlinked patient record with an PDS/ACS mismatch.
- Their record may have been in use during the upload process so their record was skipped.
- They have an existing National Summary so they are excluded (Initial Summary).
- They have an active FP69 Flag.
- Sensitive records are classed as not required.
- Patients with a consent preference of Dissent are ineligible.

Use the SCR Reporter to identify the patients and try to resolve the problem. Once resolved you can run the upload again using the Failed process to rerun previously failed uploads, or Rerun to run the upload again. You can use the Patient group option and create a group of the patients you have resolved and use this when rerunning the upload. See [Patient Group Option](#) (page 35)

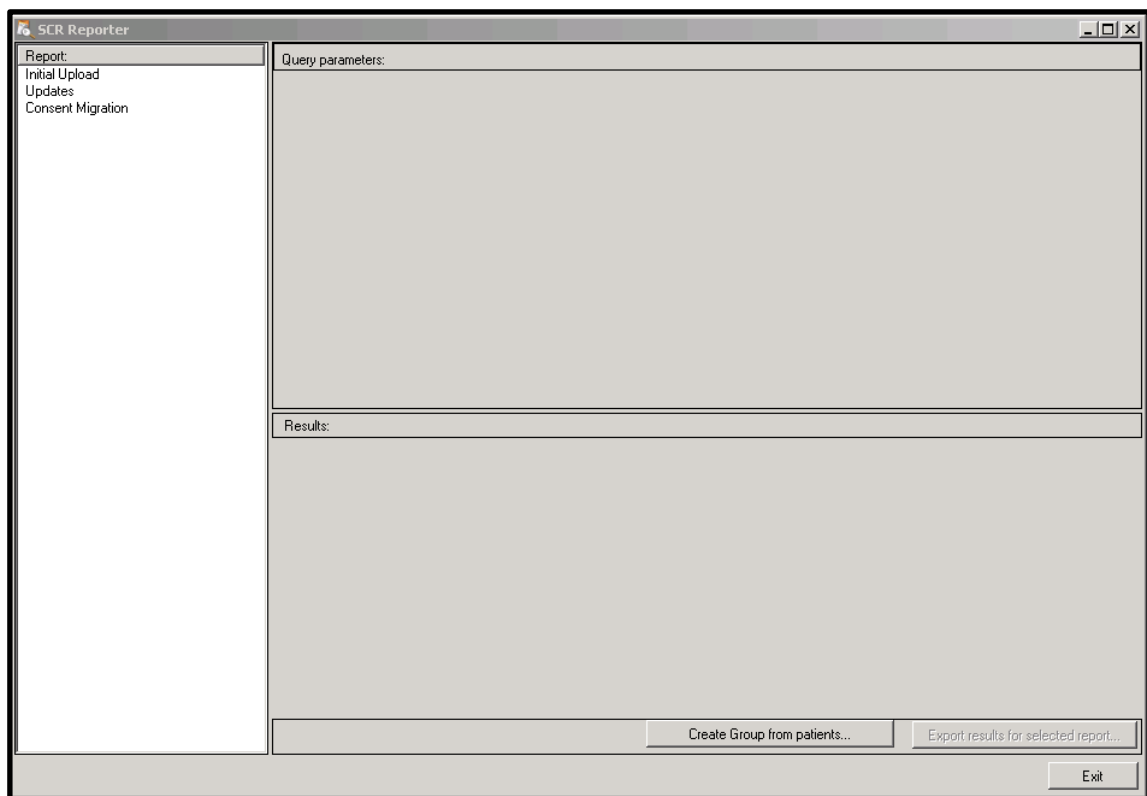
SCR Reporter

The SCR Reporter utility reports on updates to the SCR, these may be sent from Consultation Manager as new data is added to the patient's record or when running the GP Summary Bulk Transmissions. For example, this enables you to identify patients who were ineligible for an Initial Summary. Once identified, you can use the information to check the patient's details and resolve the problem that may be preventing them from having a National Summary.

SCR Reporter

A new reporting module, which enables you to report of GP Summary Bulk Uploads

is available from **Vision Front Screen- SCR - Other Reports**



Using SCR Reporter, you can produce reports for the following categories:

- **Initial Upload** (page 40) - Reports on the Initial Upload.
- **Updates** (page **Error! Bookmark not defined.**) - Reports on SCR updates sent from Consultation Manager and on the following Upload processes: Bulk Update, Bulk De-registration and the Practice No Longer Contributing to SCR uploads.
- **Consent Migration** (page 42) - Reports on the Consent Migration.

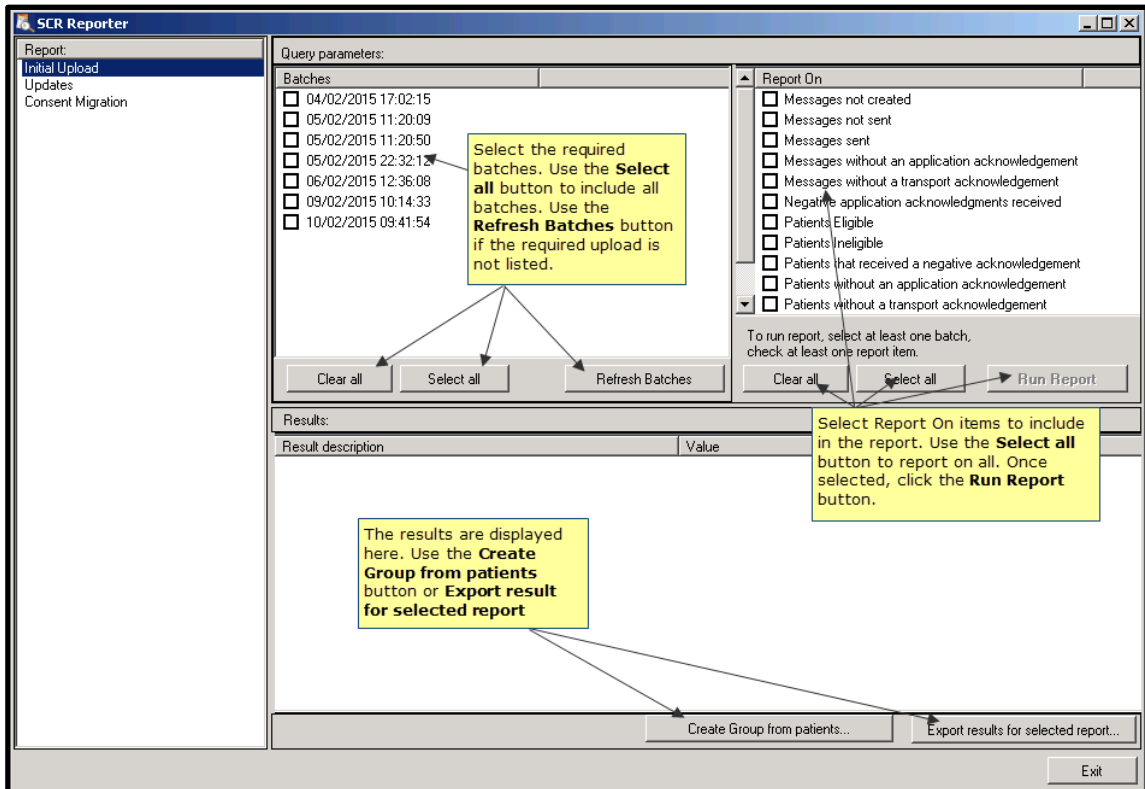
Initial Upload Report



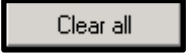

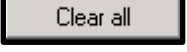

This report enables you to search for messaging errors or find ineligible patients for example, that were identified or occurred during the Initial Upload.

To run the report:



1. Go to **Vision Front Screen - SCR - Other Reports**
2. This opens the **SCR Reporter** module.
3. Select **Initial Upload**.



4. Highlight one or more of the listed batches, select **Refresh Batches**  if the required batch isn't listed. Select **Select all**  to include all batches and **Clear all**  to remove all selections.
5. Then select one or more of the listed **Report On** options, for example, Messages not created. Select **Select all**  to include all report on items and **Clear all**  to remove all selections.
6. Select **Run Report** . The results are listed in the window below.
7. The report can be saved as the following outputs:

- Create Group from patients  - Creates a patient group in Vision. See [Create a Patient Group](#) (page 43)

- Export results for selected report
Creates a .csv file that can be used in Microsoft Excel. See *Export As CSV File* (page 44)

Export results for selected report...

8. Select **Exit** to close.

Training Tip - Search for Patients Ineligible to find patients for whom an Initial Upload was not sent.

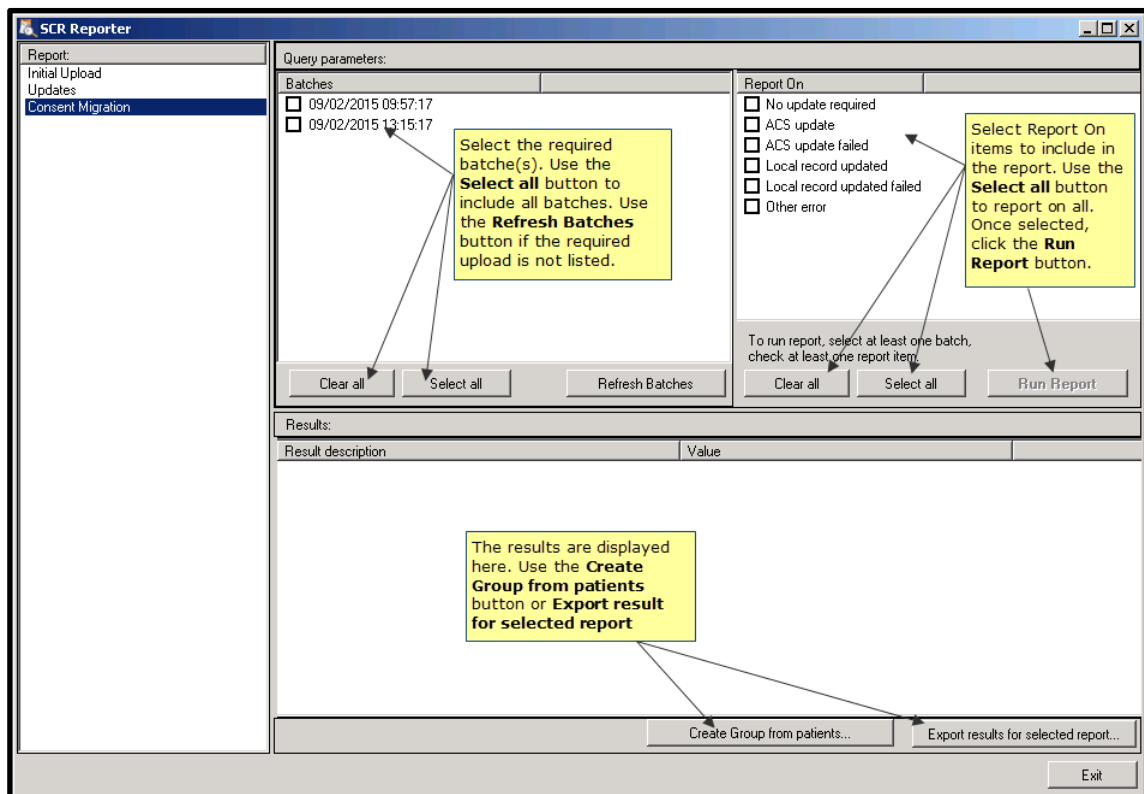
Consent Migration

This report enables you to search for errors that occurred during the Consent Migration processing.

To run the report:



- 1.** Go to **Vision Front Screen - SCR - Other Reports**
- 2.** This opens the **SCR Reporter** module.
- 3.** Select **Consent Migration**.



4. Select one or more of the listed batches, select **Refresh Batches**

Refresh Batches

if the required batch isn't listed. select **Select all**

Select all

to include all batches and **Clear all**

Clear all

to remove all selections.

5. Then select one or more of the listed **Report On** options, for example,

Messages not created. Select **Select all**

Select all

to include all report



on items and **Clear all**

Clear all

to remove all selections.

6. Select **Run Report** . The results are listed in the window below.

7. The report can be saved as the following outputs:

- Create Group from patients  - Creates a patient group in Vision. See [Create a Patient Group](#) (page 43)
- Export results for selected report  - Creates a .csv file that can be used in Microsoft Excel. See [Export As CSV File](#) (page 44)

8. Select **Exit** to close.

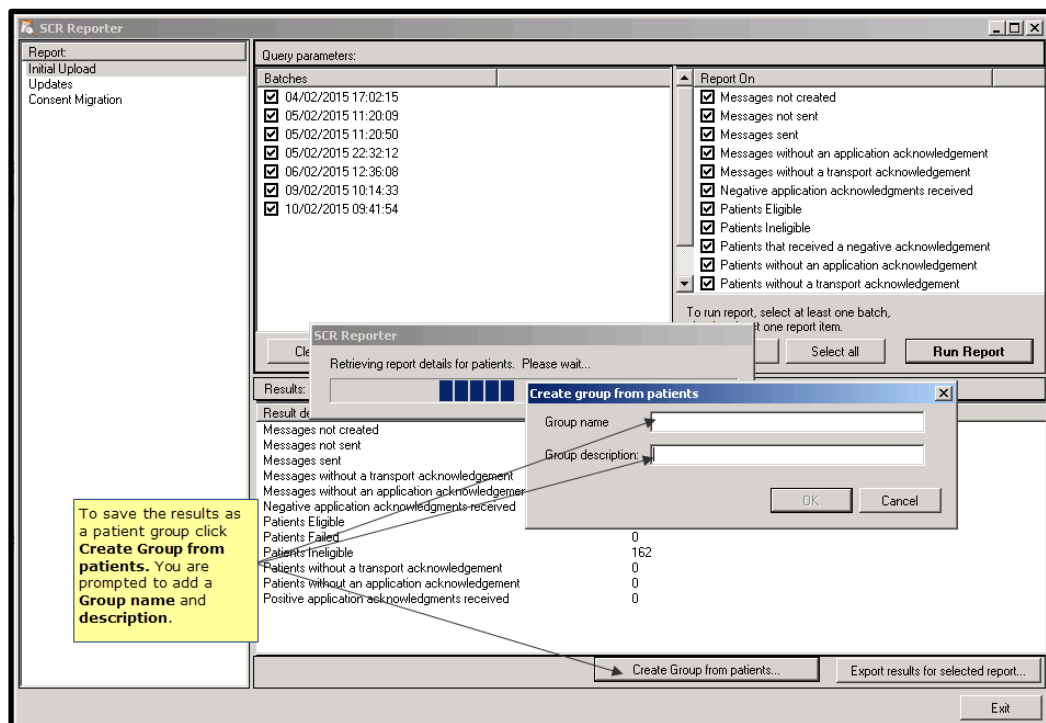
Training Tip - Search for ACS update failed to find patients whose consent preference has not been uploaded onto the Spine.

Reporting Options

Create a Patient Group

To save the output of a report as a Vision patient group:

1. Once you have run the required report, select **Create Group from patients**

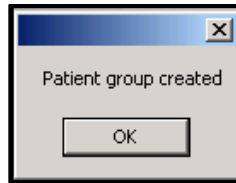



The screenshot shows the SCR Reporter application interface. On the left, there is a 'Report' list with items like 'Initial Upload', 'Updates', and 'Consent Migration'. The main area displays 'Query parameters' and a list of 'Batches' with checkboxes. On the right, there is a 'Report On' section with various report items checked. A 'Run Report' button is visible. Overlaid on this is a 'Create group from patients' dialog box with two text input fields: 'Group name' and 'Group description'. A yellow callout box with a black border points to these fields and contains the text: 'To save the results as a patient group click Create Group from patients. You are prompted to add a Group name and description.'


2. You are prompted to add a Group name and Group Description, for example, group name: IU REPORT, group description: Initial Upload Report.

3. Select **OK** to save.

4. You are prompted "Patient group created".




5. Select **OK**.

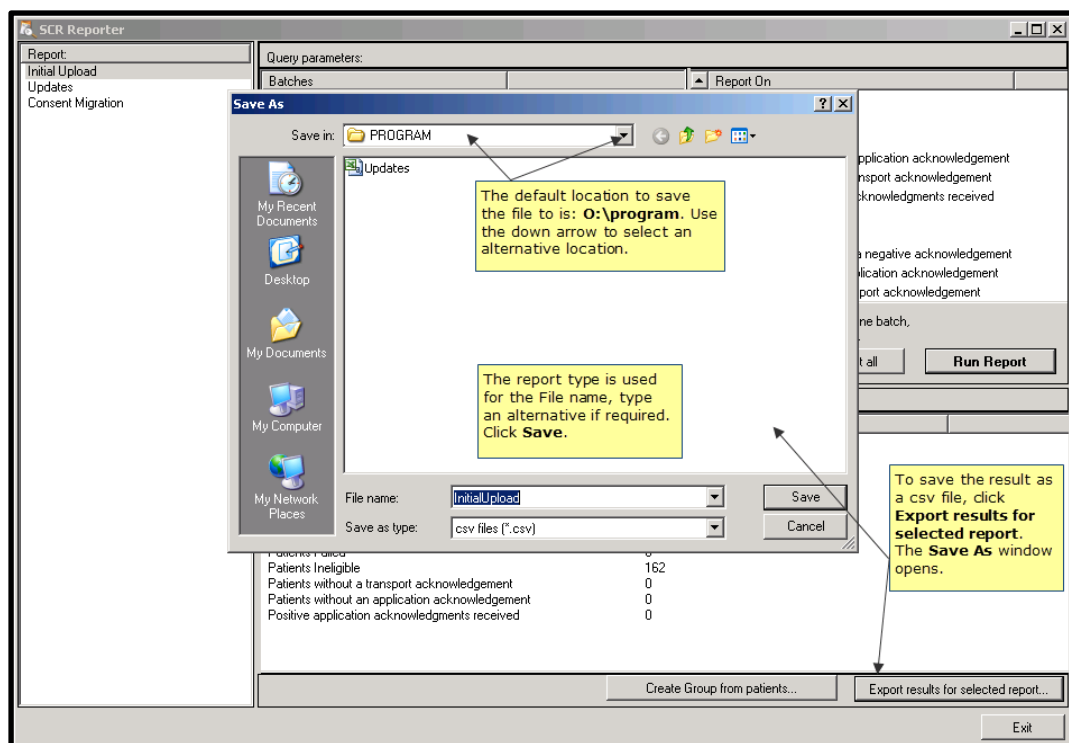
6. Select one of the other available reports, or select **Exit**  to close SCR Reporter.

7. The patient group can now be used in Vision. For example use the group in Patient Groups to add a reminder to all the records. Or select the group in Consultation Manager, using the **Select a Patient group** option from the Consultation menu. This enables you to load each patients medical record to try to identify the problem for example, a PDS mismatch.

Export As CSV File

To save the output of a report as a .csv file that can be used in Microsoft Excel:

1. Once you have run the required report, select **Export results for selected report** .

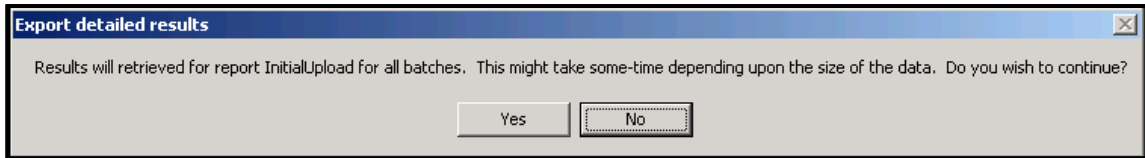


2. The Save As window opens. The default location to save to is O:\program, use the down arrow to select an alternative location to save the file to.

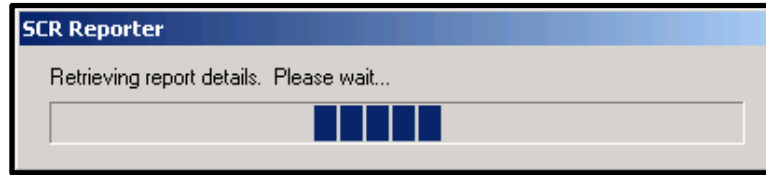
3. The report type is used for a File name for example, InitialUpload. Type an alternative file name if required.

4. Select **Save**.

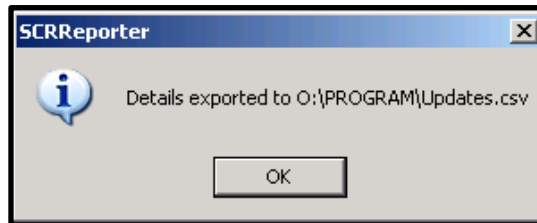
5. If you have included numerous batches you may be prompted "Results will be retrieved for report InitialUpload for all batches. This might take some-time depending upon the size of the data. Do you wish to continue?" select **Yes**.




6. A progress bar displays.



7. You are prompted "*Details exported to (the selected location)*".



8. Select **OK**.

9. Select one of the other available reports, or select **Exit**  to close SCR Reporter.

10. To view the csv file, open Microsoft Excel, select Open from the File menu and locate the saved file.

Consent Preference for SCR

The patient must have a consent status recorded for SCR messaging. This can be recorded prior to your SCR Go-live, see [Recording Consent Prior to SCR Go Live](#) (page 46).

Following your SCR Go-live, you are required to run a process called Consent Migration, this process copies locally held dissent preferences to the Spine. Consent preferences are now part of the patient synchronisation process. Each time a patient is selected in Consultation Manager, their consent status is checked with the Spine, if the patients consent is dissent on the Spine or in the local record, but not both, an Access Control Service (ACS) mismatch message is created. See Consent Migration for further details.

Once you are live if the patient decides to opt out of SCR, recording a consent preference of dissent automatically updates the Spine. The patient's record is updated. Patients who dissent have a local record (National Summary) but this is not sent to the Spine. No SCR is available for the patient on the Spine. See [Recording Consent](#) (page 46) and [Local summaries for dissenting patients](#) (page 53)

Recording Consent Prior to SCR Go Live

Patient Consent can be recorded prior to the Consent Migration process, which should be run at Go-live. See Consent Migration

There are two places that SCR consensual status can be recorded - either under Preference in the Patient Details tab or by entering a Read code.

Recording Consent

All patients have a consent status in their patient record. They can specify a specific consent preference which can be recorded in their records. Patients without a specific consent have the following details displayed:

- **No Preference Expressed** - Displays in **Consultation Manager - Patient Details - Preference**, or **National Summary - Preferences**. This is assumed by Vision to be Implied Consent and their SCR includes current repeat medication, current acute medication and all allergies and adverse reactions.

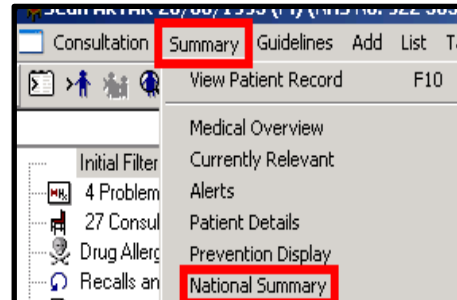
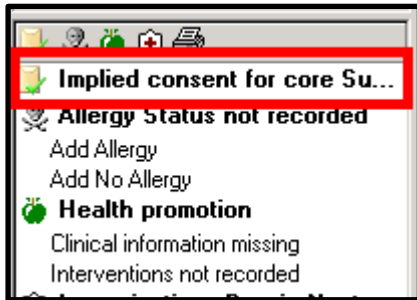
During your Go-Live, running the process called Consent Migration sends all locally recorded dissent records to the Spine. It also adds Implied Consent, using the Read code **9Ndl.00 Implied Consent for Core Summary Care Record Data Set Upload** to a patients record if the patient has an existing SCR and no previously recorded consent.

The patients consent is then checked each time a patient is selected as part of the patient synchronisation criteria. If the patient has dissented, but there are differences between the spine and the local record, an 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 until you login with your Smartcard. To preview or print the SCR or view the consent history the business function B0370 is required, this also gives you the same functionality whilst offline.

To change the patient's preference:

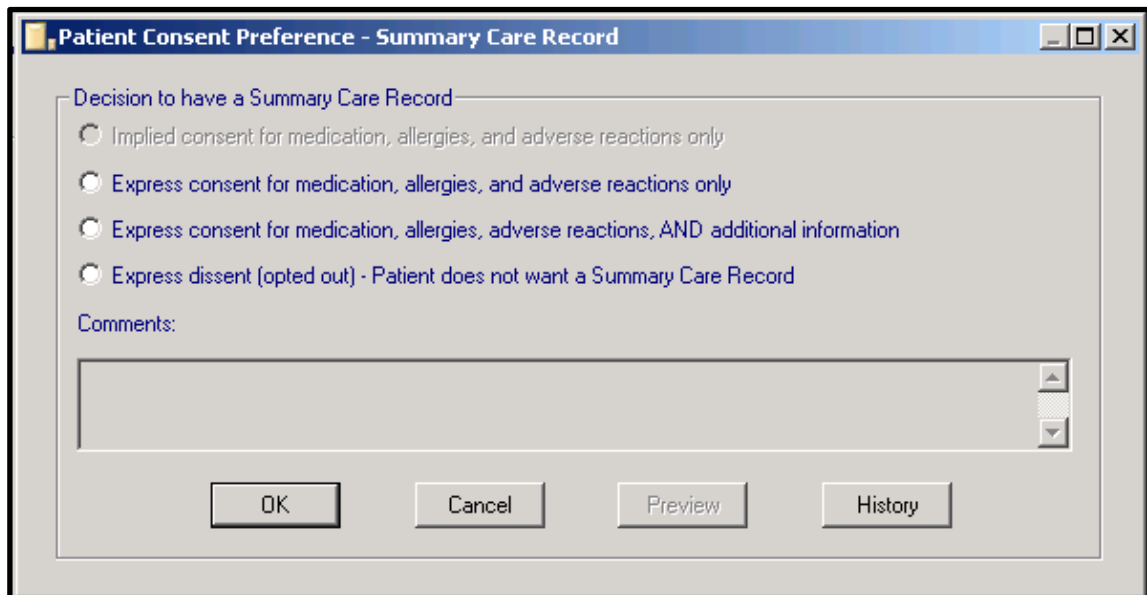
1. Go to **Vision - Consultation Manager**, select a patient and start a consultation.
2. Double click on the consent status if displayed in the alert pane, or select **Summary - National Summary**.



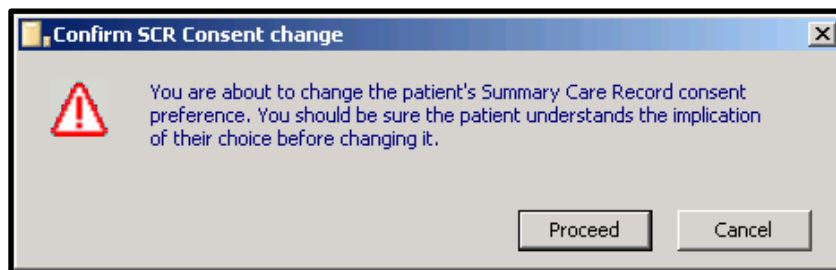
3. The patients consent preference can be updated via the **Preferences**



button on the National Summary.



- 4.** Depending on the preference expressed by the patient select one of the following:
- **Express consent for medication, allergies, and adverse reactions only** - The following Read code is recorded in the patient record: 9Ndm. 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 is recorded in the patient record with the following Read code: 9Ndn. 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 is recorded in the patients record with the following Read code: 9Ndo. Express dissent for Summary Care Record dataset upload. No SCR is sent for this patient.
- 5.** Select **OK**.
- 6.** 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.



- 7.** The patients consent preference has now been changed and can be viewed on the National Summary tab, the alerts pane and the Read code has been added to medical history.
- 8.** If you record dissent, this is sent to the Spine (ACS), when the patient is deselected.

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

Note - 9Ndl.00 Implied Consent for Core Summary Care Record Data Set Upload cannot be selected from the Consent Preference screen. It is added as part of the Consent Migration process for patients with an existing SCR. You can manually add the consent to a patient's record by adding a medical history using the Implied consent Read code.

If you have previously recorded SCR consent using the old consent preference Read codes, now known as the Legacy Read codes, these are converted during the Consent Migration upload.

The legacy Read codes are:


- **93C2.00** The patient wants to have a Summary Care Record, this is changed to **9Ndn.00** Express Consent for Core and Additional Summary Care Record Data Set Upload
- **93C3.00** The patient does not want to have a Summary Care Record, this is changed to **9Ndo.00** Express Dissent for Core Summary Care Record Data Set Upload.

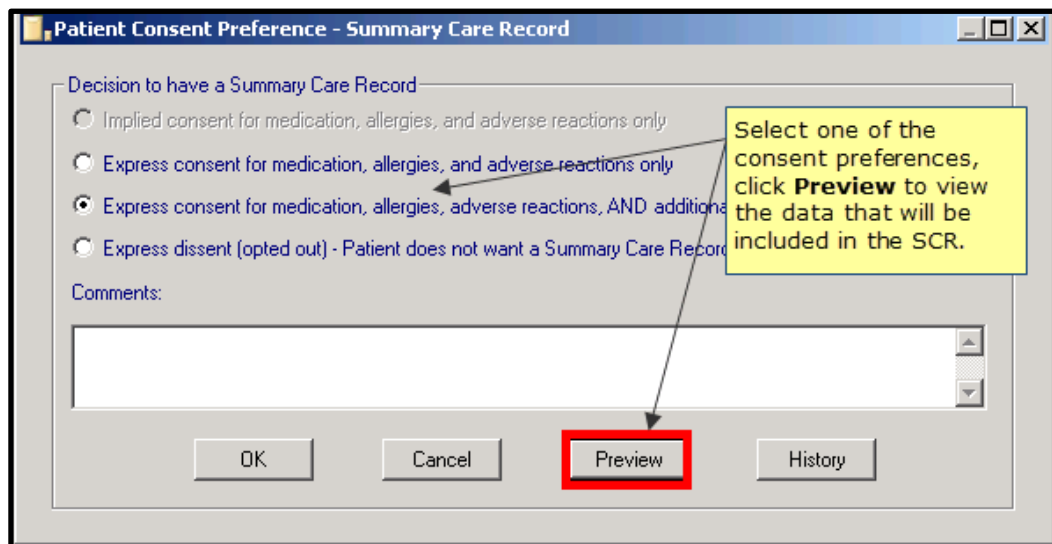
Preview and Compare the SCR

When changing a patient's consent preference you can preview the data that would be included in the Summary Care Record based on the consent selected. You have the option to compare the preview to the Current Summary Record and if required the preview can be printed.

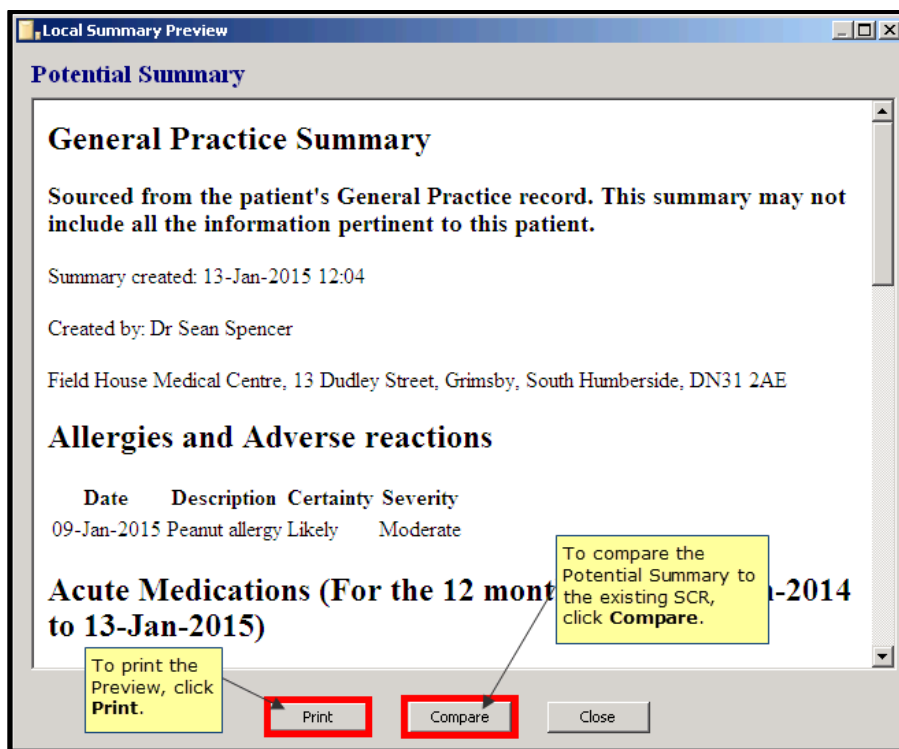
Note - You cannot Preview or Compare summaries for patients who dissent (opt out).

To preview:

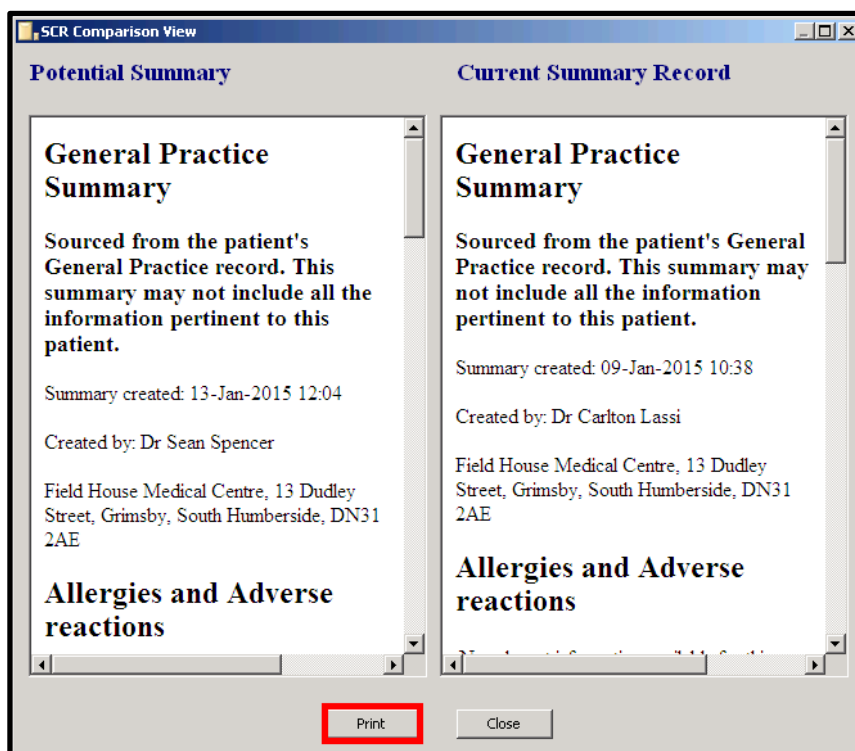
- 1.** Go to **Vision - Consultation Manager**, select a patient and start a consultation.
- 2.** Double click on the consent status displayed in the alert pane, or select **Summary - National Summary**.
- 3.** Select **Preferences**  on the National Summary tab.



- 4.** Select the required consent preference and select **Preview**.
- 5.** The Local Summary Preview window displays, showing the potential summary for the patient.




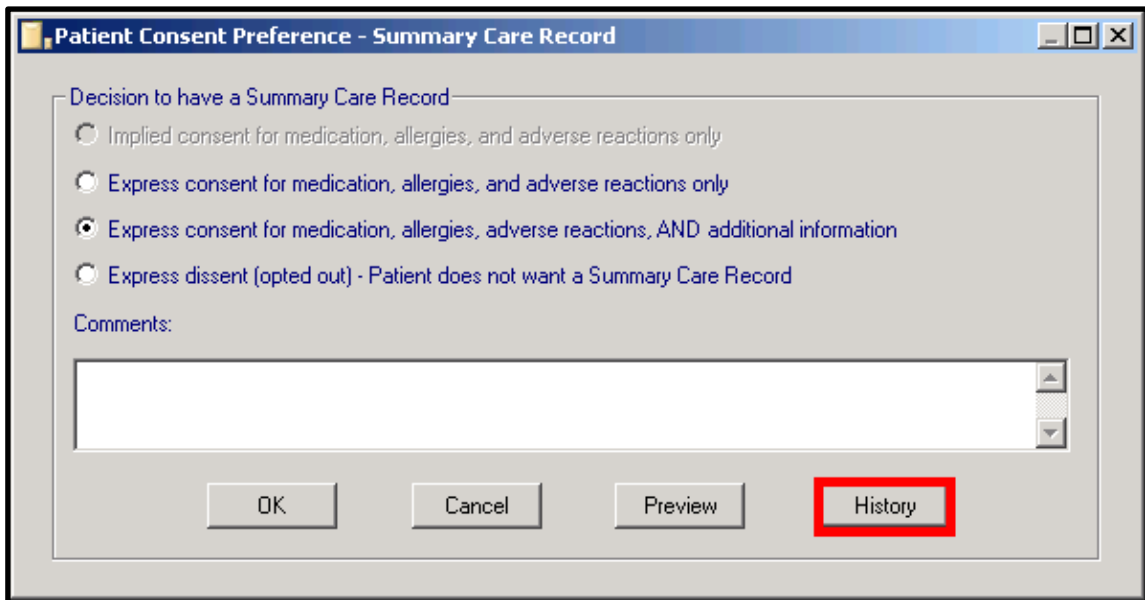
6. To print the Preview select **Print**, the Print dialog displays, select **Print** to send to the printer.
7. To Compare the Preview with the existing SCR, select **Compare**.
8. The SCR Comparison View displays showing the potential and current summaries, side by side. To print the Comparison select **Print**, the print dialog displays, select **Print** to send to the printer.



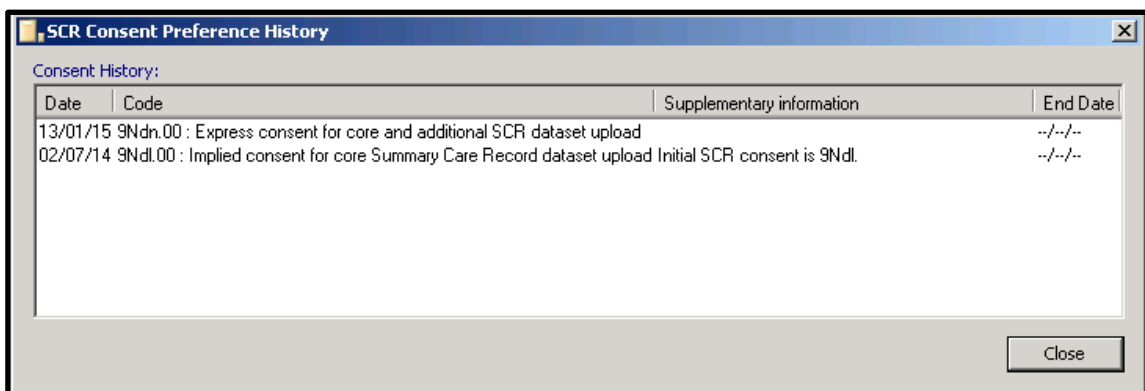
View Consent History

To view all the changes made to the patients consent preferences:

1. Go to **Vision - 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. Select **Preferences**  on the **National Summary** tab.
4. To view the consent history, select **History**.

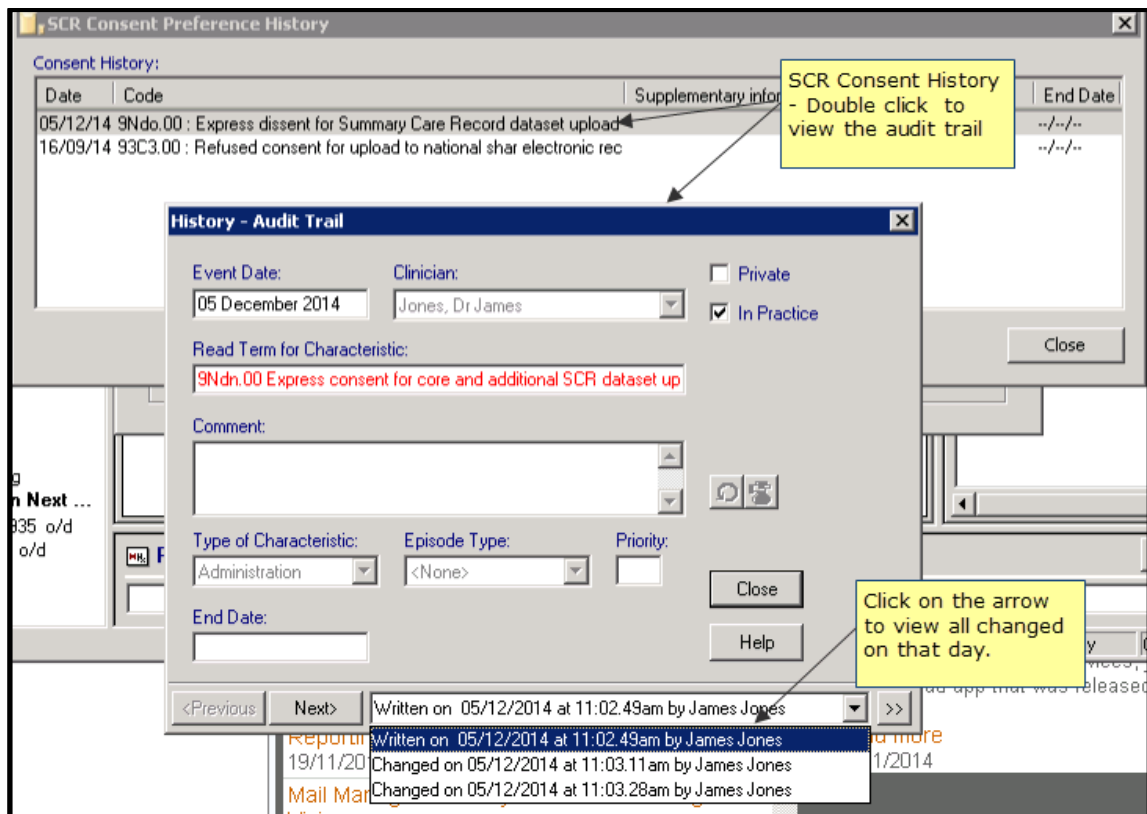


5. All changes to the patients consent are displayed.



Date	Code	Supplementary information	End Date
13/01/15	9Ndn.00	: Express consent for core and additional SCR dataset upload	--/--/--
02/07/14	9Ndl.00	: Implied consent for core Summary Care Record dataset upload Initial SCR consent is 9Ndl.	--/--/--

6. If the consent is changed numerous times on the same day, only one entry displays. To view all of the changes for that day, double click on the entry, the History - Audit Trail displays, select the arrow at the bottom of the entry to view the audit trail which shows all changes made that day.



Local summaries for dissenting patients

For patients who have opted **not** to have an SCR a local summary can be viewed in Consultation Manager using the National Summary tab. No updates or changes are sent for the dissenting patient. The patient's SCR cannot be viewed and there is no longer a blank summary displayed.

Patient consent and dissent within NHS Care Records Service

It is important that patients, doctors and their staff understand for what patients can and cannot express their consent for record sharing.

The NHS Care Record Service has a number of components:

- **PDS** (the Personal Demographics Service) stores names, ages, addresses and registered GP of all NHS patients. This data has been held by the NHS for many years in central computer systems and there is no option to opt-out of this service.
- **PSIS** (the Personal Spine Information Service) stores details of patients' clinical records and medication. This data has only previously been held on local GP and hospital systems, not centrally. It is allowable for patients to opt out of this service, but they need to understand that this information is not be available to other healthcare professionals when they are seen, for instance, in an Accident and Emergency department.
- If the patient refuses consent for their records to be shared **and** opts not to have a SCR (i.e. not shared and not stored on PSIS), then a blank record is created on PSIS to demonstrate that they have opted out. Although, if required, the patient can refuse consent for their records to be shared but still have a SCR on PSIS (i.e. stored but not shared) which is initially accessible to their GP practice. With further patient consent decided at the time of each further out of practice consultation the SCR can be accessed by other healthcare professionals.
- **eReferral** (Choose and Book) manages all aspects of GP referral letters and appointments electronically. Patient consent for eReferral has a separate consent area in its own right in the future. If the patient opts out of sharing the SCR, this does not make them exempt from being referred through eReferral.
- **EPS** (the Electronic Prescription Service) receives details of prescriptions from GPs for pharmacists to draw down and dispense medication items. It is not currently possible to withhold consent for this data to be shared, but it is only shared with the pharmacist who dispensing the medication and the Prescription Pricing Division of the NHS Business Services Authority. If patients do not want their prescriptions transmitted electronically, then GPs can continue to print them on paper.
- Vision supports patients refusing consent for their records to be shared on PSIS. There is an explicit flag that can be set, that is transmitted to PDS to mark their records as refused consent to share the clinical record.

National Summary Display

Selecting a Patient

When you select a patient, Vision checks the following details with the Spine:

- **Patient details** - PDS synchronisation is run when the patient is selected. For patients with personal or demographic details that differ to the Spine, a PDS Mismatch displays. You can verify the details with the patient and process the updated details or defer making changes to the time being. If you defer, a SCR PDS Synchronisation is run, if the patient has sufficient matched data their identity is confirmed. See [SCR PDS Synchronisation](#) (page 55) If the patient demographic data is not successfully SCR PDS synchronised they are unlinked, you cannot update or send SCR for the patient. See [Unlinked patients](#) (page 56)
- **Consent Preference** - The patient's consent details are now checked on the Spine (Access Control Service - ACS) each time the patient is selected in Consultation Manager. If the patient dissents and the patient's local consent record does not match the Spine an ACS mismatch message displays. See [ACS Mismatch](#) (page 56) for further details. You cannot update or send any SCR updates until the mismatch is resolved. If the ACS mismatch is not resolved the patients existing SCR and local record can be viewed but not updated. Once "dissent" is stored on the Spine no Spine summaries can be viewed or sent for the patient.

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 is run automatically. See [SCR PDS Synchronisation](#) (page 55)

SCR PDS Synchronisation

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

NHS number		Forename
Gender	+	OR
DOB		Postcode
Surname		

Where a SCR PDS synchronisation has been 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:

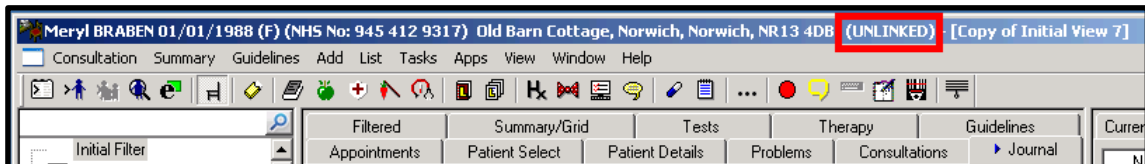
- If PDS and Vision data have corresponding blanks for non-mandatory demographic information (ie other than the above), the PDS synchronisation is regarded as matched.
- If the patient demographic data is not successfully SCR PDS synchronised, the patient is **Unlinked**. You can view their local and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

Note - A Daybook 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.

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.



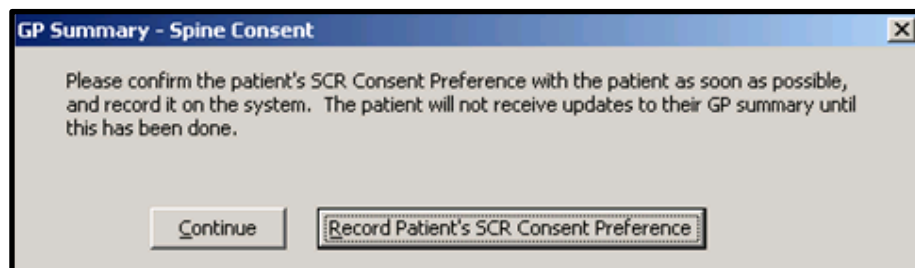
ACS Mismatch

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

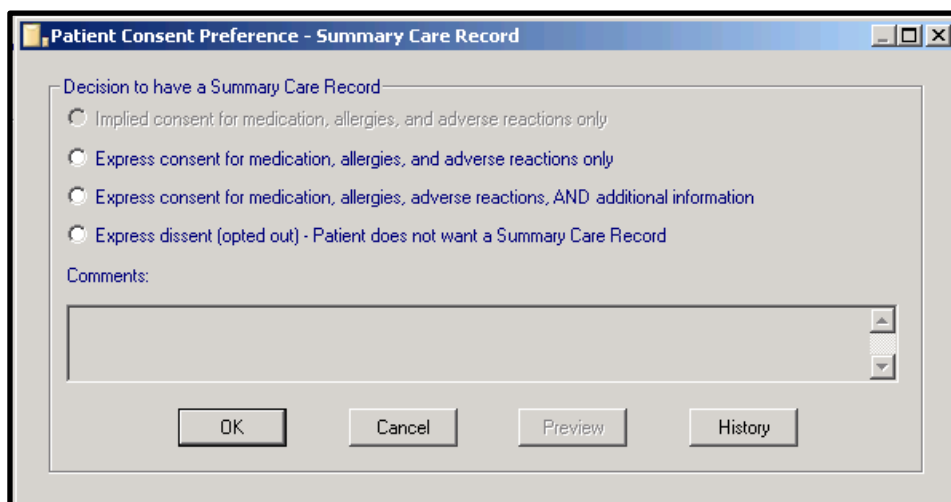
Note - Consent mismatches are unlikely to happen if you have run Consent Migration.

To resolve an ACS mismatch:

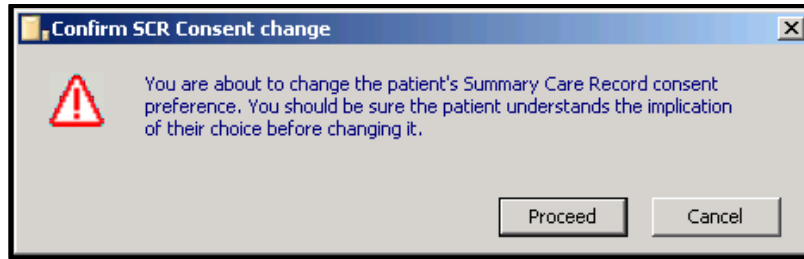
1. Select a patient in **Vision - Consultation Manager**.
2. If an ACS mismatch exists you are prompted: "*Please confirm the patient's SCR Consent Preference with the patient as soon as possible, and record it on the system. The patient will not receive updates to their GP summary until this has been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



3. Consultation Manager is opened automatically and the Consent Preference window 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.



- The patient's consent preference has now been changed and can be viewed on the National Summary tab, the alerts pane and the Read code has been added to medical history. The ACS mismatch has been resolved and the consent sent to the Spine.

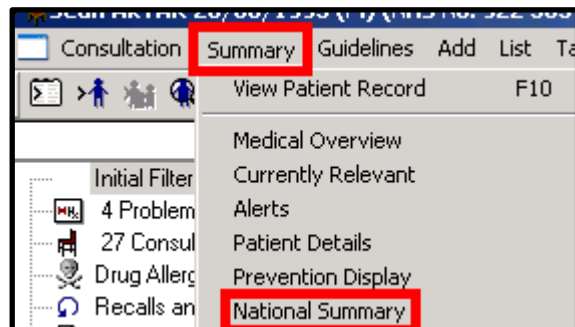
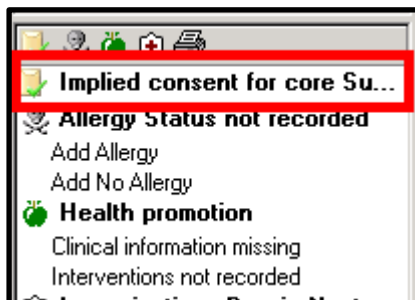
Note - You must process consent mismatches to ensure no SCR messages are sent for dissenting patients. A Daybook task is created each time a patient is selected if they have an outstanding ACS/consent mismatch, this is also displayed as a reminder in Consultation Manager.

Viewing the National Summary - Permanent Patients

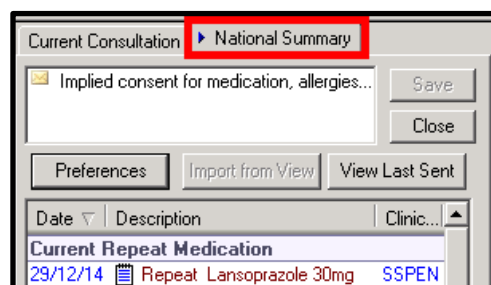
To update the SCR to the Spine Smartcard login is required. The National Summary can be viewed and updated whilst offline, but any changes to the summary or consent preference are queued until you next login with your Smartcard.

To select the National Summary:

- Go to **Vision - Consultation Manager**, select a patient and start a consultation.
- Double click on the consent status displayed in the alert pane, or select **Summary - National Summary**.



- The National Summary displays on the right of your screen, with the current consultation tab.



Viewing the National Summary for a Non-Permanent Patient

SCR Viewer is a new utility has been created to enable you to access SCR for patients who are not permanently registered.

SCR Viewer

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 local Privacy Officer.

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:

- **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.

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

Note - When registering non-permanent patients you should be logged in with your Smartcard to ensure the patients details are confirmed by PDS.

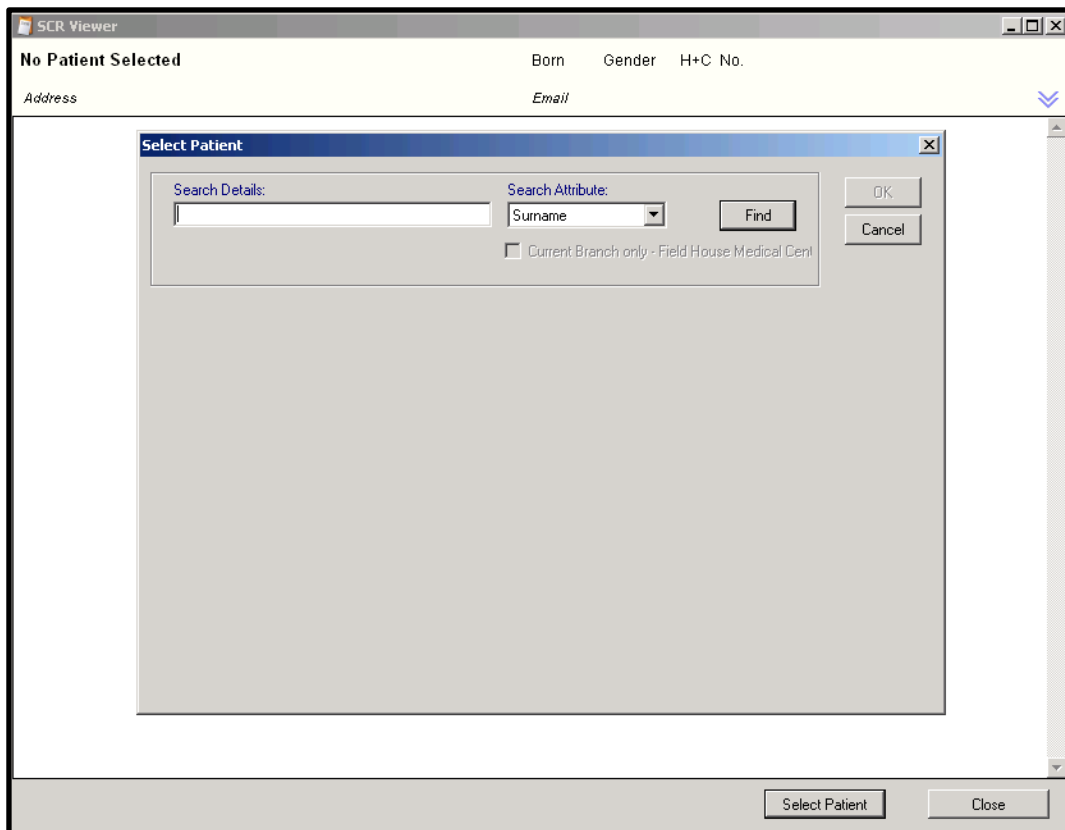
For details of how to register a non-permanent patient see the Registration on-screen help.

Viewing the SCR

To access the SCR Viewer:



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

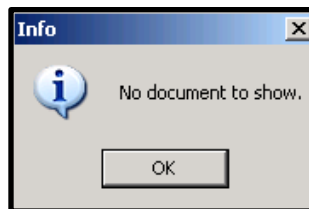


2. The SCR Viewer window with the Select Patient box open displays, add the patient search details for example, Surname.

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 65)

3. Select **Find** to search for the patient.
4. Select the correct patient and select **OK**.
5. A progress bar displays.
 - If the patient is not permanently registered at the practice, their ACS consent status is checked.
 - If the patient has opted out of SCR, no summary displays. You are prompted: *"This patient does not have a Summary Care Record (has opted out)"*, select **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:

- **Yes (View Record)** - If the patient has given permission, select **Yes - Continue**, the patient's Summary Care Record displays.
- **No (Access Refused)** - If the patient has not given permission, select **No - Continue**. A "No document to show" message displays on the viewer, select **OK**.



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 displays, select the non-permanent patient, for example, 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 View Permissions

Has this patient given you permission to view their Summary Care Record?

Yes (View Record)

No (Access Refused)

Emergency Access

Access for Legal Reasons

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.

Clinical emergency

Additional Text:

Continue Cancel

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

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

Confirmation

Are you sure you want to proceed?

Yes No

5. The patient's Summary Care Record displays.

SCR Viewer

MART, Paul (Mr) Born **11-May-1982 (32y)** Gender **Male** NHS No. **945**
 Address **10, HATTON GROVE, GRIMSBY, S HUMBERSIDE, DN33 1LH** Phone **No Contact Number...**

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	Prescribed: 11-Aug-	Linezolid 600mg tablets	AS DIRECTED	52 tablet

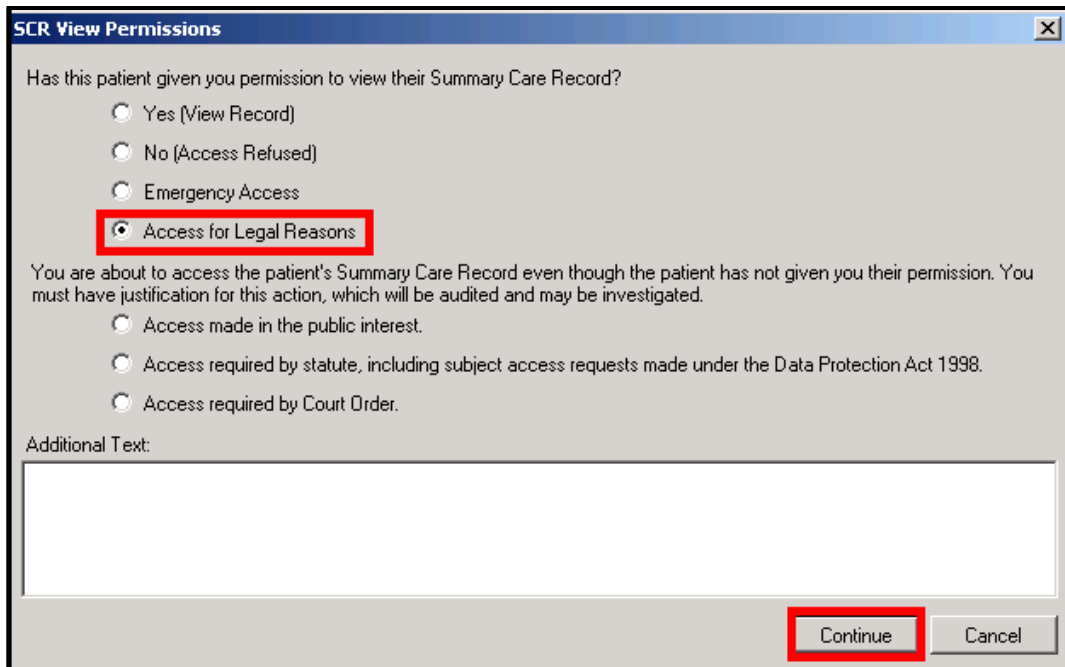
Select Patient Close

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 displays, select the non-permanent patient, for example, 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.

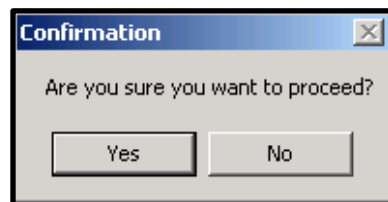


The image shows a dialog box titled "SCR View Permissions". It contains the following elements:

- Question: "Has this patient given you permission to view their Summary Care Record?"
- Radio buttons:
 - Yes (View Record)
 - No (Access Refused)
 - Emergency Access
 - Access for Legal Reasons (highlighted with a red box)
- Text: "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."
- Radio buttons for justification:
 - 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.
- Text: "Additional Text:" followed by a large empty text area.
- Buttons: "Continue" (highlighted with a red box) and "Cancel".

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

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



The image shows a dialog box titled "Confirmation". It contains the following elements:

- Text: "Are you sure you want to proceed?"
- Buttons: "Yes" and "No".

5. The patient's Summary Care Record displays.

SCR Viewer

MART, Paul (Mr) Born 11-May-1982 (32y) Gender Male NHS No. 945
 Address 10, HATTON GROVE, GRIMSBY, S HUMBERSIDE, DN33 1LH Phone No Contact Numbers ...

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
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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 Medication	Prescribed: 11-Aug-2014	Linezolid 600mg tablets	AS DIRECTED	52 tablet

Select Patient Close

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.*" select **OK** to close. The SCR message cannot be viewed.

Information

 This patient has insufficient detail recorded. NHS number, Surname, Gender, Date of Birth, and either Forename or Postcode are required.

OK

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.

What information is held on the Summary?

The summary shows three panes:

- The header section - See *National Summary Header* (page 66)
- Core Data and additional Information - See *Core Data* (page 66) and *Additional Information* (page 68)
- Additional information that has been withheld - See *Withheld Data* (page 69)

All patients have any additional information automatically included or withheld. Where patients consent to core data only the additional information items are displayed greyed out and are not included in the SCR. Patients who consent to core data and additional information have the items displayed and sent to the Spine.

The screenshot shows the 'National Summary' interface with several callout boxes providing instructions:

- Current consent status for patient.** Points to the 'Express consent for medication, allergies and...' section, which shows '3 Items changed since the last save' and 'Save'/'Close' buttons.
- Access the Consent Preference options.** Points to the 'Preferences' button.
- Import the data on view in the patient record ie Medical History data.** Points to the 'Import from View' button.
- Number of items changed since last save. Click Save, or close the patients record to save and update the National Summary.** Points to the 'Save' and 'Close' buttons.
- Click to view the the last Summary Care Record sent to the Spine.** Points to the 'View Last Sent' button.
- Core SCR data: includes medication, allergies and adverse reactions.** Points to the 'Current Repeat Medication' and 'Current Acute Medication' sections.
- Further individual items can be manually added. Additional Information (manual) can be removed by dragging items to the bin.** Points to the 'Additional Information (manual)' section.
- Additional Information can be automatically or manually included, but is only sent if the patient has consented.** Points to the 'Additional Information (automatic)' section.
- Withheld Items - displays data that is automatically excluded from SCR messages.** Points to the 'Withheld Items' section.
- Use the arrow buttons to view previous National Summaries sent to the Spine.** Points to the '<<' and '>>' buttons at the bottom.

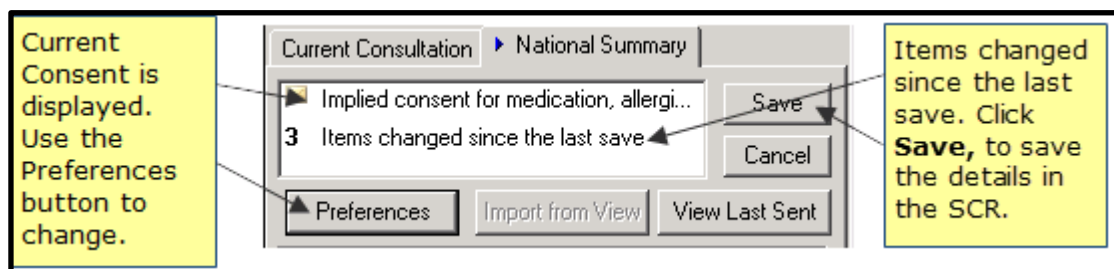
The interface displays the following data:

Date	Description	Clinic...
Current Repeat Medication		
23/02/15	Repeat Co-codamol 15mg/500mg tablets maximum 6 allowed Supply (28) tablet MDS	SSPEN
Current Acute Medication		
29/09/14	Imidapril 10mg tablet 2 TABLE TWICE A DAY	
Allergies		
29/09/14	H/O: drug allergy Possible Moderate Allergy to Aminophylline hydrate 350mg modified-release tablets	BENR
Additional Information (manual)		
29/09/14	BP 120 / 80 taken Sitting Cuff: Standard O/E - blood pressure reading	
Additional Information (automatic)		
29/09/14	Diabetic retinopathy Diabetic retinopathy	
Withheld Items:		
Additional Information (automatic)		
23/02/15	Chlamydia test positive = (-)	SSPEN

At the bottom, it shows: Last sent on 23 Feb At 2:02:16pm By Dr Sean Spencer

National Summary Header

The National Summary message header displays the current consent status and details of any items which have been changed since the last save.



See *Items changed since last save* (page 74) for further details.

Core Data

When a patient is selected, regardless of the consultation type, any new Core Data is automatically populated into the Summary and is automatically sent to the Spine when you deselect the patient.

Core data consists of:

- **Current Repeat Medication** - All active repeat medication which has not been discontinued in the last 6 months. If there is a Repeat Until Date specified, then this date must be in the future or within the last 6 months. If there is no Repeat Until Date, then the number of issues must be less than the maximum or the last issued must have been made within the last 6 months.
Inactive Repeats from GP2GP messages are NOT included in the SCR core data upload.
Current Repeat Medication - Discontinued Repeat Medication - A discontinued repeat master is included in the SCR message if it was discontinued in the last six months.
Current Acute Medication - all acute medication prescribed in the last 12 months excluding repeat issues.
OTC (Over The Counter) drugs and items prescribed elsewhere (i.e. hospital) are included in the drug categories.
- **Allergies and Intolerances** include suspected adverse reactions and allergies including allergies to drugs, foods and any other substances (this includes Allergies entered through the Allergies and Intolerances SDA and also Read coded allergies).

Note - Negative allergy entries and degraded allergies (ie those sent via GP2GP) are not included in the SCR.

Note - If the patient's record does not contain one or any of the above data categories, the category description is uploaded as part of the summary but states beneath that "No relevant information available for this category."

Patients with Full SCR Consent

SCR v2.1 introduces new functionality, an improved mechanism to make it easier for GPs to create SCRs with additional information for patients with full SCR consent, **9Ndn. Express consent for core and additional SCR dataset upload.**

This can be used to benefit such as 'end of life' patients, the "frailest 2%" and those with long term conditions and/or communication problems such as those with learning disabilities or dementia; or indeed any patient that feels that it would be beneficial to have additional information about their care/health added to their SCR. Existing patients with additional information in their SCRs have this supplemented with additional relevant information as described below. Adding additional information remains within the control of individual patients and their GPs. The patient's 'express consent' is required for additional information to be included on the SCR. If the patient's consent for additional information is recorded in the system, the SCR contains:

- The core information of Medications, Allergies and Adverse Reactions, plus the reason for medication.
- Further relevant information pertaining to:
 - Significant problems (past and present)
 - Significant procedures (past and present)
 - Anticipatory care information
 - End of life care information – as per EOLC dataset ISB 1580
 - Immunisations

As with the existing Additional information functionality, the information added to the SCR consists of coded items from the GP record with their supporting free text. When the SCR is populated with the additional information, then users can preview the SCR content to ensure sensitive information is not included.

Further individual items may be added. This can be used to include relevant items not automatically included or sensitive items that the patient would like adding to the SCR. The SCR is automatically kept up to date with the relevant information above as the GP record is updated over time. For details of automatically included data see Additional Data (Automatic)

Patients can be reassured that potentially sensitive items (IVF, STDs, terminations, gender re-assignment) are automatically excluded unless the patient wants them including. If so, the patient must provide consent for their GP to add them. For details of automatically excluded data see Excluded Data (Automatic)

The lists of Read codes used for inclusion and exclusion are set by NHS Digital and Vision.

Additional Information

Additional Information (automatic) displays for all patients within the National Summary. If the patient consents to Additional Information, the details are automatically updated and 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 HSCIC and INPS.

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 HSCIC and INPS

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](#).

Reason for Medication

Active problems are automatically added to the National Summary. If the problem is linked to a therapy item, the problem header is used as the reason for medication. However only patients with a consent preference of **9Ndn.00 Express Consent for Core and Additional Summary Care Record Data Set Upload** have this information added to the SCR and sent to the Spine. Patients without this consent see the problem header in the additional information (automatic) section but it is greyed out (not sent).

Withheld Data

A specific list of coded excluded items is used to automatically exclude potentially sensitive data, this displays 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 76).

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

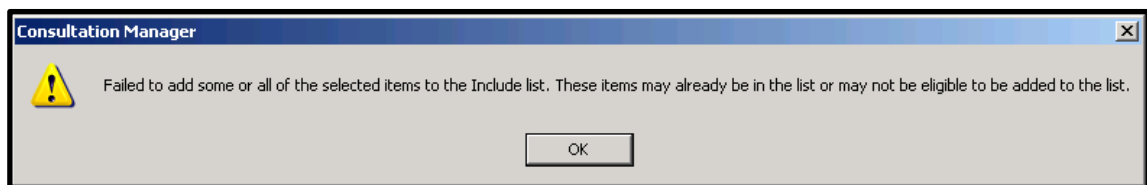
- Assisted fertilisation and in-vitro fertilisation (IVF).
- Sexually transmitted diseases (STD).
- Termination of pregnancy.
- Gender reassignment.

Items Not Included in the National Summary

The following list shows the items that cannot be included in the National Summary:


- Non-medication items with no Read code
- Recalls
- Attachments, letters and Referral Message Digest items for Choose & Book
- IOS Entries
- Consultations

If you try to add a data to the National Summary that is not permitted, you are prompted with the following message: *"Failed to add some or all of the selected items to the Include list. These items may already be in the list or may not be eligible to be added to the list."* select **OK** to close.



Viewing the Last Sent Summary

The last National Summary sent for the patient can be viewed using the **View Last**

Sent  button on the National Summary tab. Or select **Show the latest summary record** from the right mouse menu.

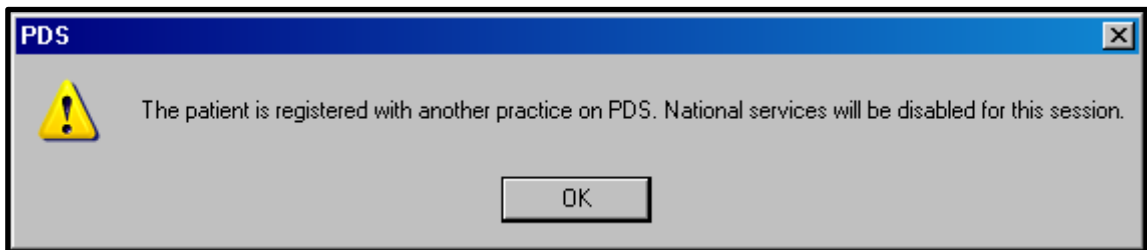
Who is permitted to add data to the summary?

All users who have rights to add or edit information to Consultation Manager and have the relevant RBAC codes and functions added to their Smartcard, can maintain the National Summary for a patient.

Patients Registered Elsewhere

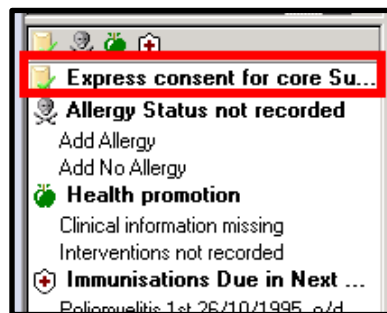
To prevent an Initial Summary or update being sent for a patient who is still recorded as Permanent (no deduction message received) but has registered with another practice, the NACS code is checked. If during synchronisation with PDS the NACS codes are found to be different, the patient is marked as "unlinked". This prevents the summary from being uploaded. The following message displays:

"The patient is registered with another practice on PDS, National Services will be disabled for this reason." select **OK** to close.









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

National Summary Functions

How do I add data to the Summary?

Most data is now added automatically to the National Summary and is then sent to the Spine. See [What information is held on the Summary?](#) (page 66) for further details.

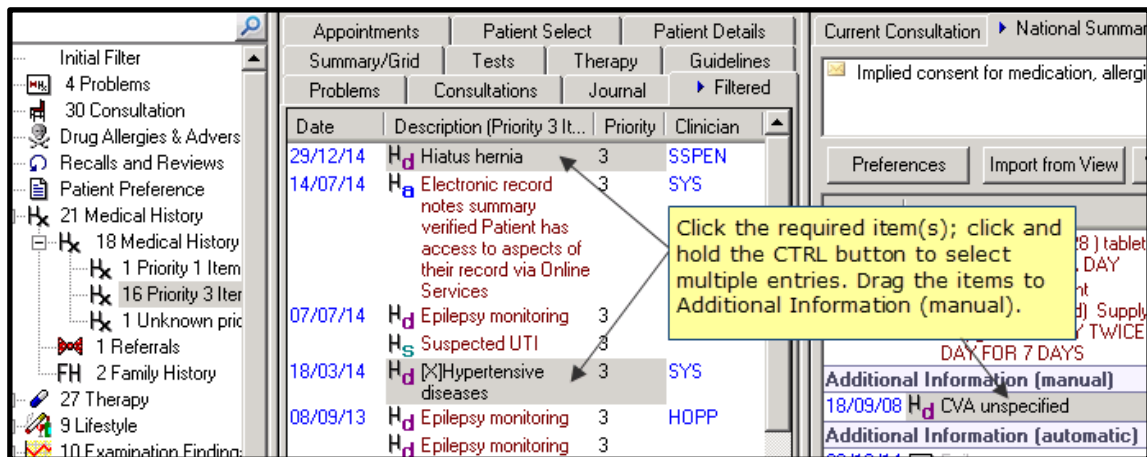
If there are data entries that you want to add to the summary that are NOT included automatically, you can add the item(s) manually.

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.

To manually add:

- 1.** In **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 to highlight the required data items, press 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 75).

To add multiple items to the Summary

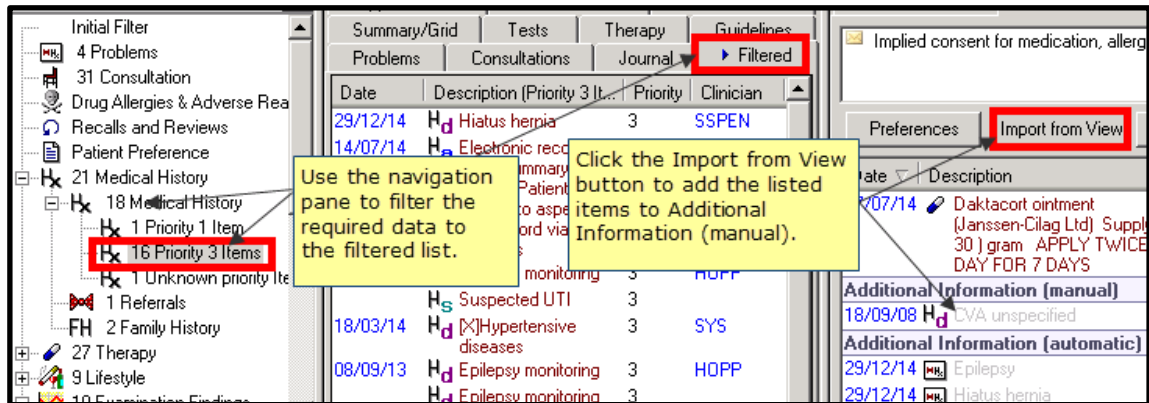
To select more than one item to be included in the Summary:

1. Hold down the **Control** key.
2. Select on the required items from the **Journal, Problems** Tab or **Filtered** list.
3. Drag the mouse over to the **National Summary Pane**.
4. Drop the items on the **Items Included Pane**.
5. They are added as **Additional Information (Manual)** items.

Import from View from a filtered list

To manually add multiple items from a specific SDA:

1. In **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.

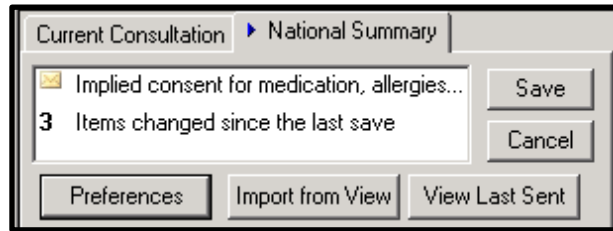


3. Select **Import from View**  or right click and select **Import items from current view**, the filtered data is added to the Additional Information (manual) category on the National Summary.

For details of how to remove manually added data see [Remove Manually Added Items](#) (page 75).

Items changed since last save

If new data was added to the patient record since the last summary was sent you are prompted from the National Summary Header, for example, *3 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. Any core data or additional information is automatically included in the summary. Other items can be added to the summary if required. To add items, multi-select them and drag to the summary.

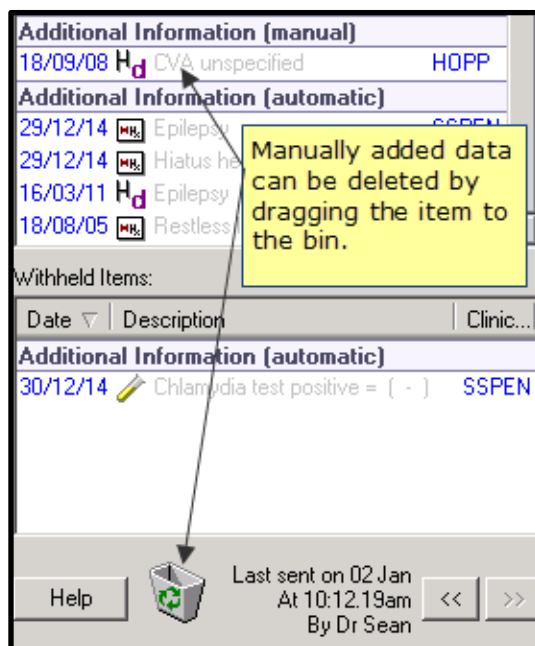
To save the changes select **Save**, the changes are sent to the Spine when the patient record is deselected.

Remove Manually Added Items

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

1. In **Consultation Manager**, select a patient, open a consultation and view the **National Summary**.
2. Select the manually added additional information and 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, press 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.

How do I withhold data?

You cannot manually withhold any data. Only items on the Excluded items list are automatically withheld, they are displayed in the Withheld Data pane and are not included on the patient's summary on the spine.

Note - For existing SCR practices, any previously manually withheld items remain "withheld".

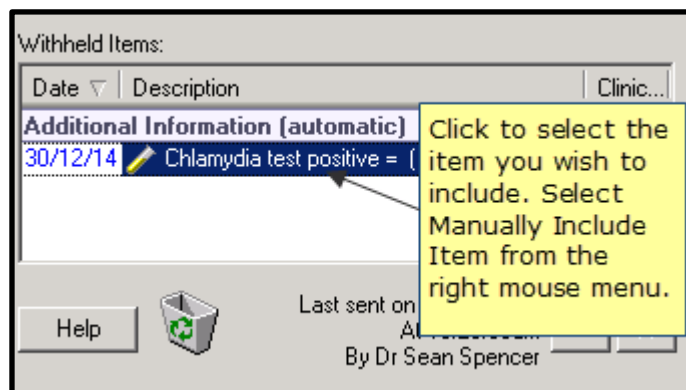
If you attempt to add data to the withheld data pane, you are prompted "*Failed to add some or all of the selected items to the Withheld list. It is no longer possible to manually withhold items.*" select **OK** to close.



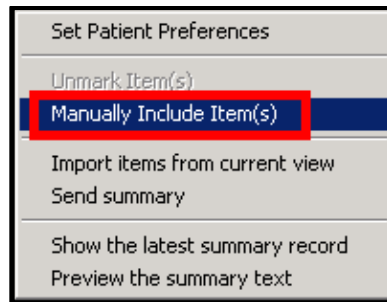
Manually Include Withheld Items

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 excluded item or press and hold **CTRL** to select multiple items you want to include.



3. Right click, 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.

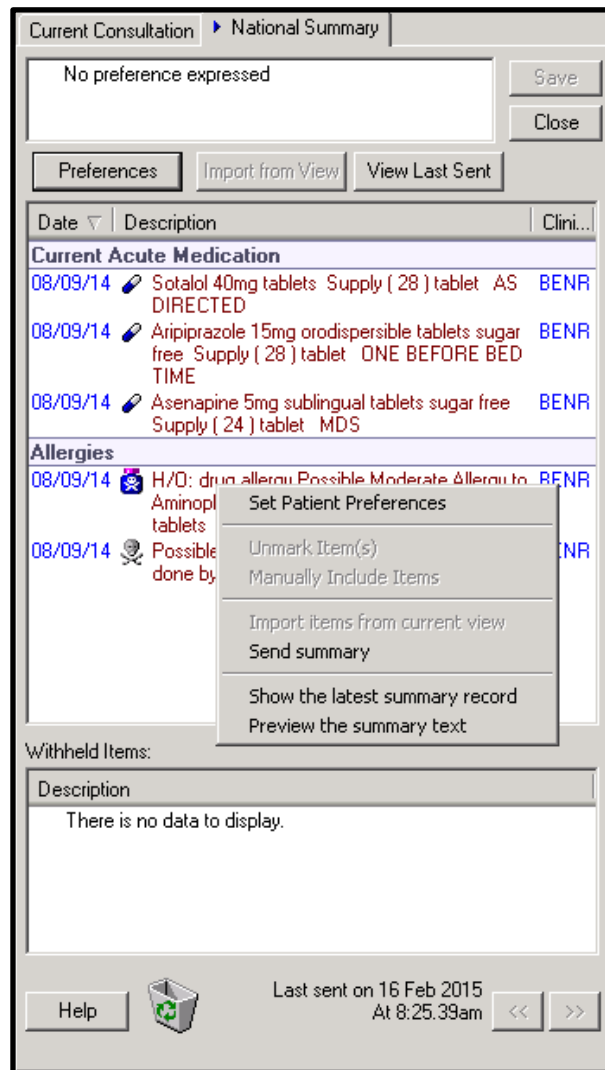
How do I replace the summary when a patient dissents?

The GP may, on the patient's instruction, reset the patient preferences to **9Ndo.00** Express Dissent for Core Summary Care Record Data Set Upload. A blank summary is no longer added or displayed. The dissenting record prevents access to the patient's SCR on the Spine, the summary cannot be viewed.

The GP can continue to maintain the summary as a 'local' summary which can be viewed on the National Summary tab; this includes the automatic addition of core data items as they are added. The updated information is not sent to the Spine.

Right click menu on National Summary

The right click menu when selected with the mouse over the National Summary pane offers shortcuts and other functionality.



Menu Options:

- **Set Patient Preferences** - Opens the consent preference window to enable you to select a new consent preference. See [Recording Consent](#) (page 46)
- **Unmark Item(s)** - Removes a manually added item from the National Summary. See [Remove Manually Added Items](#) (page 75)
- **Revert Item(s) to Automatically Excluded** - If the additional information (manual) item is on the excluded list, Unmark Items changes to this option to enable you to move the item back to the Withheld list.
- **Manually Include Items** - Moves a withheld item to the Additional Information (manual) list. See [Manually Include Withheld Items](#) (page 76)
- **Import items from current view** - Imports all the items that you have on display from either the Filtered tab or Problems List which have been added since the last Summary was sent. See [Import from View from a filtered list](#) (page 74)

Note - Problems are automatically added to the additional information (automatic) list, if you import from view they are also added to the additional information (manual) list.

- **Send summary** - Manually send the summary to the Spine. See *Manually Sending the National Summary* (page 80)
- **Show the latest summary record** - Displays the last summary sent to the Spine. See *Viewing the Last Sent Summary* (page 70)
- **Preview the summary Text** - Displays the text for the current summary as it currently stands, this can be compared to the existing Spine summary. See *Preview the SCR* (page 49)

How do I send the National Summary?

You no longer need to manually press the Send button on the National Summary tab to send SCR messages. This is because messages are now sent automatically if the selected patient has had changes to their SCR. The National Summary is automatically sent when you deselect the patient.

A SCR update is sent if the selected patient in Consultation Manager has one of the following types of activity:

- SCR relevant data is updated in Consultation Manager
- SCR relevant data is added/edited
- Registration status changes from applied to permanent
- PDS record becomes linked
- FP69 status is removed
- Consent preference is updated (if patients dissent [opt-out] no SCR is sent).

The updated SCR is sent when the patient is deselected.

The following activities trigger a SCR update automatically; the patient does not need to be selected:

- Registration status changes from permanent to transferred out – An update with deregistration text added is sent automatically when the deduct transaction is processed providing the patient has a SCR on the Spine from the existing Practice.
- Any SCR relevant data added in Docman, Daybook, Vision plus, Vision 360, Patient Groups, Priority Update.

Note - In some instances, you may want to manually send an SCR to the Spine during a consultation. See *Manually Sending SCR Messages*

Unexpected Exit

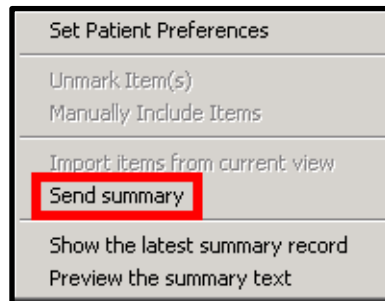
If during a patient consultation you have added data that has triggered the National Summary, for example issued a repeat prescription, the summary is marked as queued automatically. If your Smartcard should time out or Vision closes unexpectedly before you could close the patient record, the GP Summary is sent during the next automatic send of queued messages. See Monitoring SCR Messages.

Note - On resuming Vision messages that were queued are automatically sent unless the patients record is open and locked. This is to prevent partially updated messages from being sent.

Manually Sending the National Summary

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

- 1.** Go to **Vision - Consultation Manager**, select the patient and start a consultation.
- 2.** From the **Summary** menu, select **National Summary**.
- 3.** There is an option on the right mouse menu to Send summary.



- 4.** You are prompted "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?" select **OK** to send.



- 5.** The National Summary tab is closed. The send message is queued and sent when the patient is deselected.

How do I Save the National Summary?

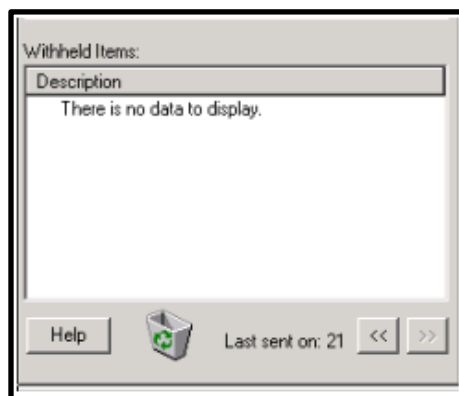
The Save button is only available if:

- The current summary is different from the earlier saved summary. See *Items changed since last save* (page 74)
- You have the authorised user rights to update a summary

Note - All users who have rights to add or edit information in Consultation Manager can maintain the National Summary for a patient.

How do I look at previous summaries?

You can view previous summaries using the arrow keys at the bottom of the National Summary tab.



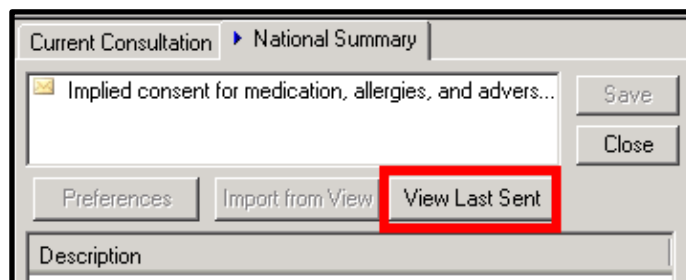
Withdrawing Summaries

You can now only choose to withdraw an SCR from the View Last Sent button on the SCR screen. Also Patients who have changed their NHS number no longer have their SCR automatically withdrawn.

Note - To withdraw a summary you must log in with a Smartcard and have the new RBAC business function **B8029 - Withdrawal of Summaries**.

To withdraw a summary:

- 1.** In **Vision - Consultation Manager** select the patient and start a consultation.
- 2.** Select **National Summary** from the SUMMARY menu or double click on the consent status alert in the navigation pane.



- 3.** Select **View Last Sent** or right click and select **Show the latest summary record**, the current summary record displays.

Latest SCR View

Current Summary Record

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: 2014-10-14T15:32

Created by: Dr James Jones

Amherst Medical Practice, Amherst Medical Practice, 21 St Botolphs Road, Sevenoaks, Kent, TN13 3AQ

Allergies and Adverse reactions

No relevant information available for this category.

Acute Medications (For the 6 month period 15-Apr-2014 to 14-Oct-2014)

Type	Date	Medication Item	Dosage instructions	Quantity
Acute Medication Prescribed	14-Oct-2014	Maalox oral suspension (Sanofi)	IN THE USUAL MANNER	500 ml

Repeat Medication

No relevant information available for this category.

Discontinued Repeat Medications (For the 6 month period 15-Apr-2014 to 14-Oct-2014)

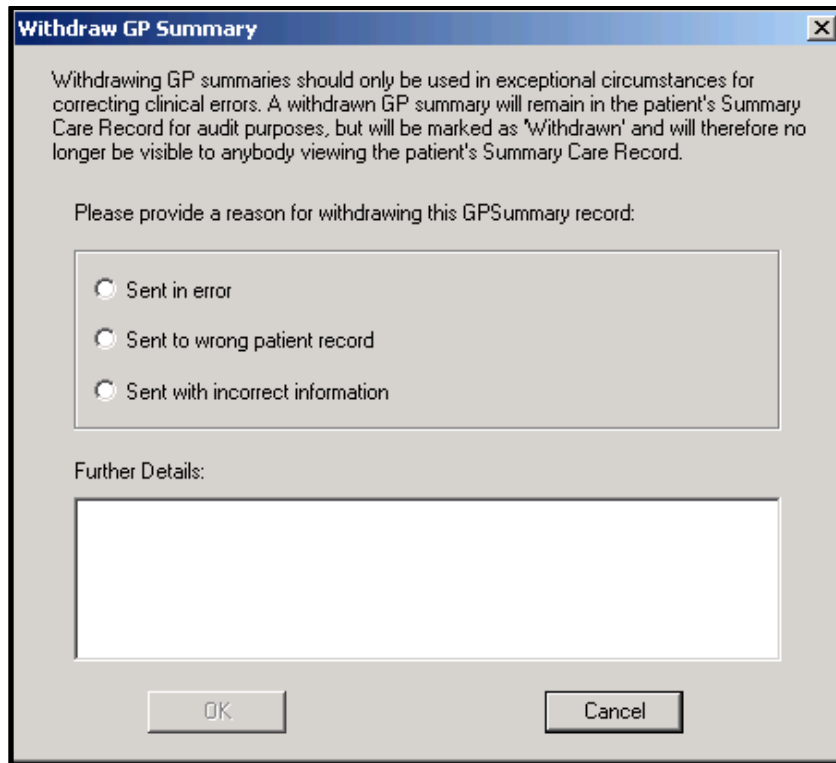
No relevant information available for this category.

Summary Sent: 14-Oct-2014 15:32

Print Withdraw Close

Click Withdraw to remove the current SCR message.

4. Select **Withdraw**, you are prompted "Withdrawing GP summaries should only be used in exceptional circumstances for correcting clinical errors. A withdrawn GP summary will remain in the patient's Summary Care Record for audit purposes, but will be marked as 'Withdrawn' and will therefore no longer be visible to anybody viewing the patient's Summary Care Record. Please provide a reason for withdrawing this GP Summary record:"



The image shows a dialog box titled "Withdraw GP Summary". It contains a warning message: "Withdrawing GP summaries should only be used in exceptional circumstances for correcting clinical errors. A withdrawn GP summary will remain in the patient's Summary Care Record for audit purposes, but will be marked as 'Withdrawn' and will therefore no longer be visible to anybody viewing the patient's Summary Care Record." Below this is a prompt: "Please provide a reason for withdrawing this GP Summary record:". There are three radio button options: "Sent in error", "Sent to wrong patient record", and "Sent with incorrect information". Below these is a text area labeled "Further Details:". At the bottom are "OK" and "Cancel" buttons.

5. Select one of the following options:
 - Sent in error
 - Sent to wrong patient record
 - Sent with incorrect information
6. Type any further details in the box supplied.
7. Select **OK** to withdraw the summary with the selected option.

Deselecting the patient

When closing the consultation and deselecting a patient, the summary is automatically sent if:

- the user has rights to send the message
- data has been added which required an update to be sent.

Note - If you are working offline, any sent updates are queued. These are automatically sent the next time you login with your Smartcard. Otherwise they can be authorised by another member of staff with an RBAC role to process queued messages. See [Sending National Summaries that are Queued](#) (page 100)

Event Log for SCR Changes

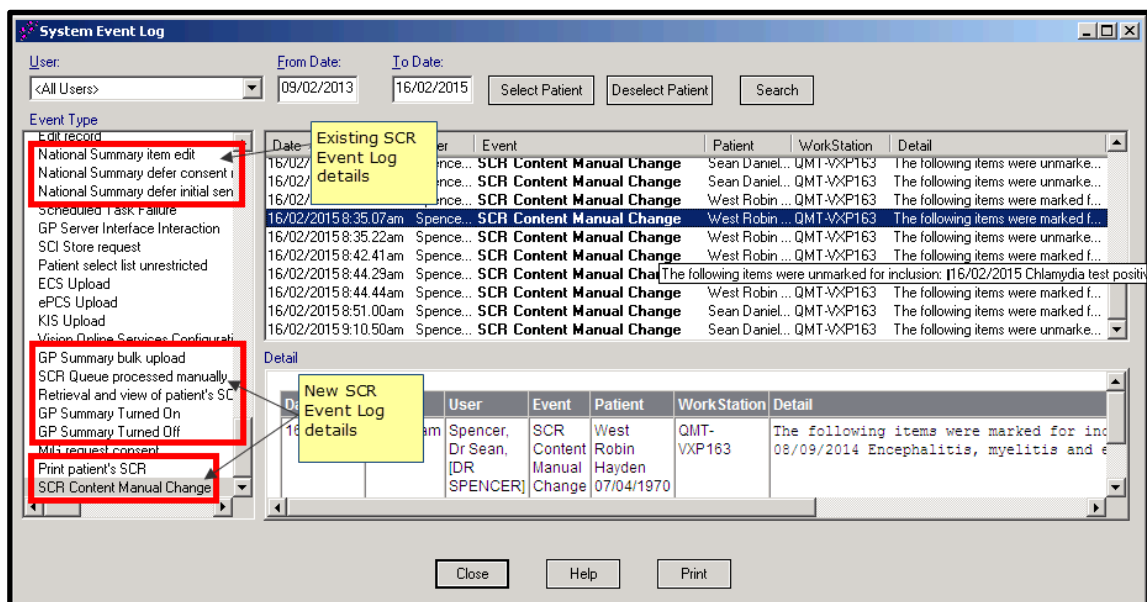
There is an audit trail of SCR activity in the Event Log module.

The **Event Log - Other Events** have been updated to show details of the following SCR processes:

- GP Summary bulk upload
- SCR Queue processed manually
- Retrieval and view of patient's SCR
- GP Summary Turned On
- GP Summary Turned Off
- Print patient's SCR
- SCR Content Manual Change

The existing SCR processes remain unchanged:

- National Summary item edit
- National Summary defer consent recording
- National Summary defer initial send



Creating Local Summaries

You can create a local practice summary for patients using the SCR functionality. This can also be used for patients who have opted **not** to have an official SCR on the national Spine. This summary is stored locally in Vision and is **not** accessible to 3rd parties. However, the summary is uploaded to the Spine if the patient ever changes their preference to "I want a Summary Care Record". Local summaries are maintained in the same way as an SCR for upload but are **not** sent.

How Registration Status affects the National Summary

Once you have enabled SCR you can continue to register new patients as before in Vision - Registration. However, the registration processes used have been updated to ensure patient consent and SCR are sent for new patients.

The following details explain how the processes have been updated:

- **New Permanent Registrations** - New permanently registered patients have an SCR available to view in Consultation Manager. Patients with an existing summary on the Spine from their previous practice have a note attached to their SCR and are not updated until the offset period has expired. See [New Permanently Registered Patients](#) (page 86)
- **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 updated or sent. See [SCR PDS/ACS Mismatch](#)
- **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 new SCR Viewer. See [Non-Permanently Registered Patients](#)
- **Transferred Out Transactions** - When a patient transfers out their SCR is automatically updated with a message that the SCR is no longer updated as the patient has left the practice. See [Transferred Out Patients](#) (page 90)
- **FP69 Notification** - When a patient fails to respond to an invitation or has returned NHS mail, for example, Breast screening invitation, they may have a FP69 Notification this is valid for 6 months. If the patient has an active FP69 you cannot view the patients SCR. See [FP69 Flag](#) (page 91) [Transferred Out Patients](#) (page 90)

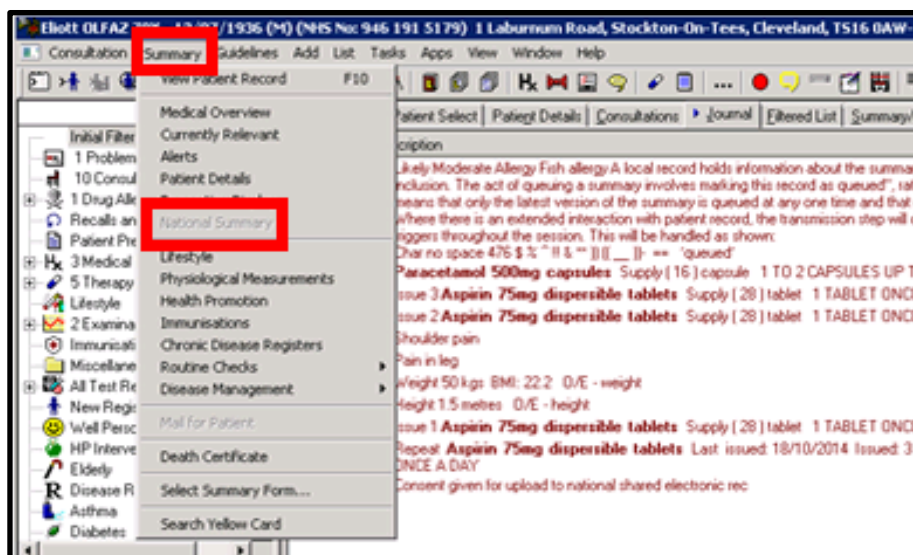
New Permanently Registered Patients

When a new permanent patient is registered 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", the details are sent to the Health Authority (HA) for approval. See [Applied Registration Status](#) (page 87)
- **Permanent** - When an approval transaction is received from the HA, the patient's registration status is changed 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 88)
 - Permanent patients with an existing National Summary from their current practice. See [Accepted patients with a existing National Summary from the Current Practice](#) (page 89)
 - Permanent patients without a previous National Summary. See [Accepted patients without a previous National summary](#) (page 89)

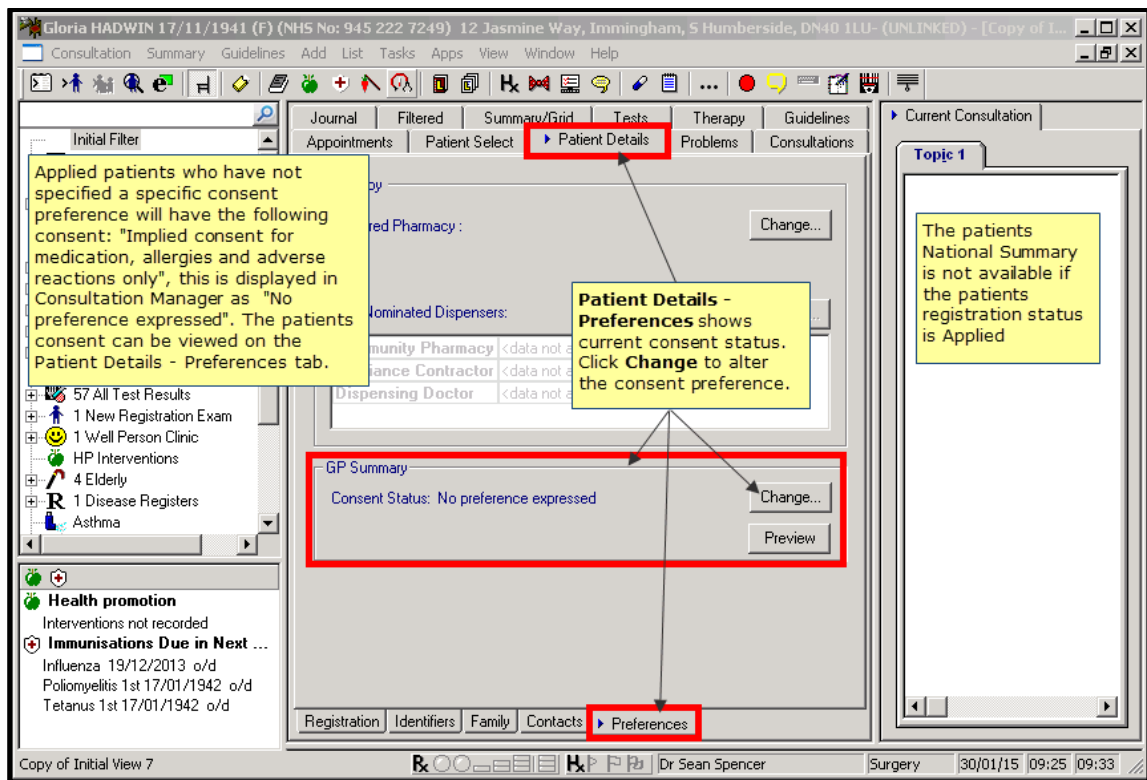
Applied Registration Status

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 for medication, allergies and adverse reactions only**" is assumed, it displays as "No Preference Expressed" in Consultation Manager.

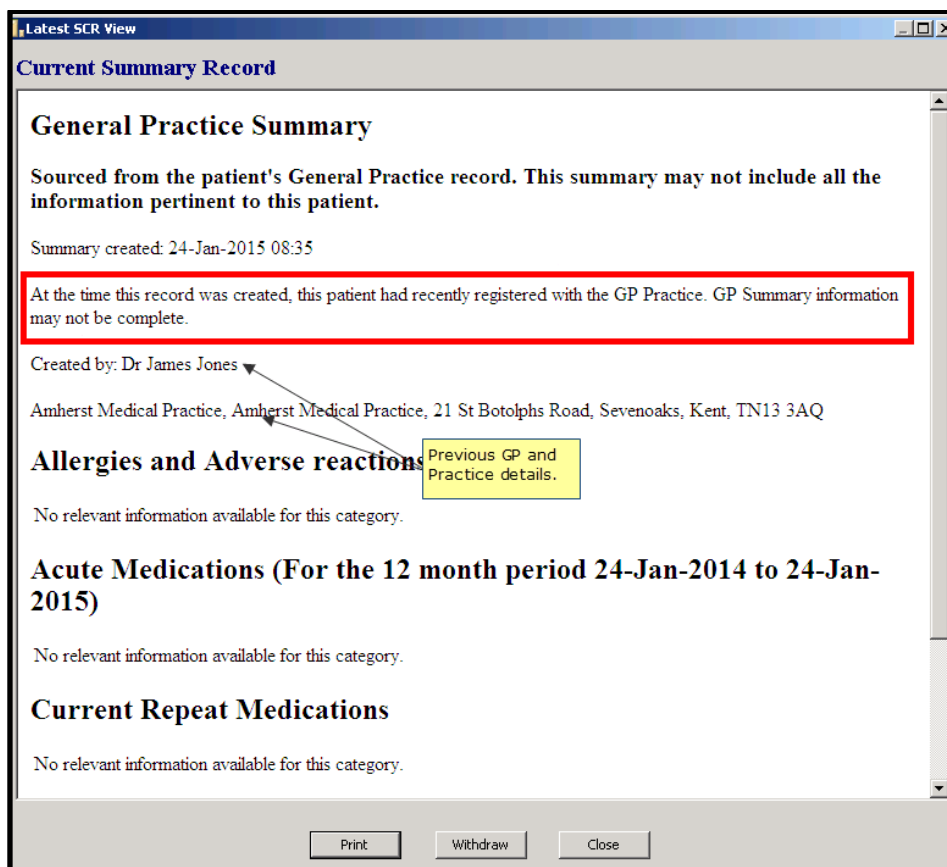
Whilst "Applied" the patient's current consent status can be viewed in **Consultation Manager - Patient Detail - Preferences**.



Accepted patients with an existing National Summary from their previous Practice

When a new permanent patient is accepted (i.e. an Approval Transactions 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."*

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.



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

Accepted patients with an existing National Summary from the Current Practice

If the permanent patient has an existing summary from the current practice, the offset period does not apply. The summary is updated and sent when the patient is next selected in Consultation Manager. When the patient is selected a PDS and ACS synchronisation is automatically run. 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

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 which contains all the relevant clinical details as per the patients consent when the patient is next selected in Consultation Manager. The offset period does not apply.

When the patient is selected a PDS and ACS synchronisation is automatically run. 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

Consent Preference

During the registration process the patients Consent Preference is NOT sent to the spine. Once the patients registration is "Permanent", when they are next selected an ACS synchronisation is done. If the patients consent does not match the Spine and 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 56)

Patients with no existing consent record has the consent "**Implied consent for medication, allergies and adverse reactions only**" this displays as "No Preference Expressed" in Consultation Manager. This is not uploaded to the Spine.

Whilst the patient's registration status is "Applied" their current consent status can be viewed in **Consultation Manager - Patient Detail - Preferences**. When their registration is updated to "Permanent" their consent status is also available to view on the National Summary Tab.

The screenshot displays two side-by-side windows from a medical software application. The left window is titled 'Patient Details' and shows a 'GP Summary' section with 'Consent Status: No preference expressed'. A yellow callout box points to a 'Change...' button with the text 'Click Change to alter the consent status.'. The right window is titled 'National Summary' and shows 'No preference expressed' at the top. Below this is a 'Preferences' button, also highlighted with a yellow callout box that says 'Click Preferences to change the current consent status.'. Underneath are buttons for 'Import from View' and 'View Last Sent'. A table of 'Current Acute Med' is visible, listing medications like Linezolid, Sotalol, Aripiprazole, Asenapine, and Co-codamol with their respective dates and descriptions.

Date	Description
01/10/14	Linezolid Supply DIRECTED
01/10/14	Sotalol 40mg tablets Supply (28) tablet AS DIRECTED
01/10/14	Aripiprazole 15mg orodispersible tablets sugar free Supply (28) tablet ONE BEFORE BED TIME
01/10/14	Asenapine 5mg sublingual tablets sugar free Supply (24) tablet MDS
01/10/14	Co-codamol 15mg/500mg tablets Supply (28) tablet

For further consent details see the [SCR Quick reference - Consent Model](#).

Transferred Out Patients

When a Deduction transaction is received from your TP and processed the patient's registration status is changed 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, a SCR is sent updating the summary to show that the patient is no longer registered with your practice, with the following message: "*Patient registration ended (date of deduction is displayed). 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.

SCR Viewer
SCHWARZSCHILD, Areille (Mrs) Born 28-Nov-1934 (80y) Gender Female NHS No. 946 191 4962

Transferred Out 29/01/2015 Removal to new TP/HB/CSA

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: 04-Feb-2015 13:18

Patient registration ended 04-Feb-2015. GP Summary no longer being updated.

Created by: B82645

COMPASS DTTO S/BORO, Glens Medical Centre, 65 Falsgrave Road, Scarborough, North Yorkshire, YO12 5EA

Allergies and Adverse reactions

Date	Description	Certainty	Severity
16-Sep-2014	Egg protein allergy		

Bulk Transfer - Practice Split/Closure

When there is a practice split or closure 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 GP Summary "*Patient registration ended (date of deduction is displayed). GP Summary no longer being updated.*" and a transaction sent from Registration Links to request the patients are transferred out.

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 on 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 the six month expiry of the FP69 status under a Deduction code of 14 Returned Undelivered.

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

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, no patients with an FP69 flag are included in an Initial Upload, you cannot view or update the SCR.

To find patients with an FP69 Status:

1. In **Registration**, select the **Actions** menu.

2. Select Respond to FP69 Prior Notification.

This should list all the patients with an FP69 Status.

3. Select on the patient name and on the **Edit** button 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 patients 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 is updated when the transaction is processed. See *Transferred Out Patients* (page 90)

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

See the Registration help file for more detailed information about FP69s.

Daybook and SCR

The following tasks and notifications are created in Daybook as a result of SCR activity in Vision:

- **ACS Mismatch Tasks** (page 93) - For patients with a consent preference of "Dissent" if the local consent record does not match the Spine an ACS mismatch is created.
- **PDS Mismatch Tasks** (page 95) - For patients whose local demographic details do not match the Spine, a PDS Mismatch displays each time the patient is selected until the PDS mismatch is resolved. If the patient is "Unlinked" SCR messages cannot be sent until the mismatch is resolved.
- **Queued items have been sent Notification (page 97)** - When a user works offline, any SCR updates are queued until the user next logs in with their Smartcard. When the queued message is successfully sent a Daybook notification is delivered to the originator of the SCR message to inform them their patient's SCR update has been sent. The notification may contain multiple patient details, dependant on the items queued.
- **Notification of Transmission errors** (page 98) - If a message could not be sent correctly then a Daybook task is created so that action can be taken by a system administrator or other nominated person. If there are many failures, then these are grouped together in a single notification.

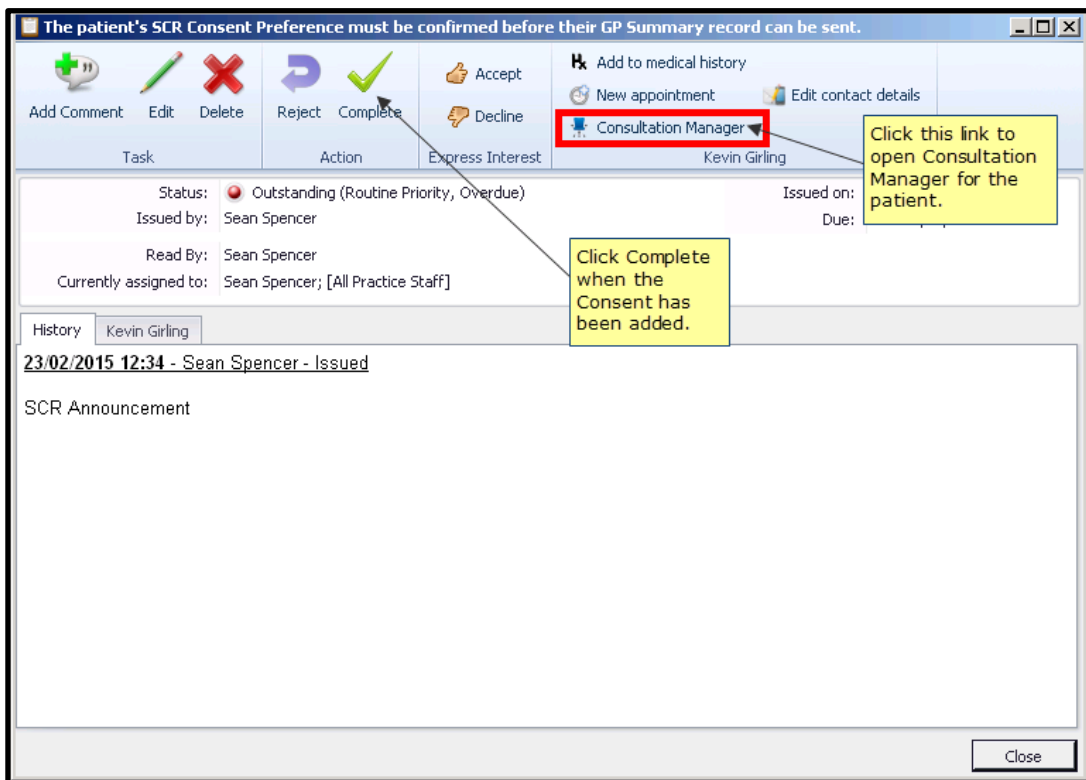
SCR task notifications are sent to all daybook users. If you would rather the Daybook notifications were sent to specific staff to be resolved rather than all of the practice staff and Clinicians, you can create a SCR group in Control Panel and add relevant staff to the group. See [Create a SCR Group in Control Panel](#) (page 99)


ACS Mismatches in Daybook

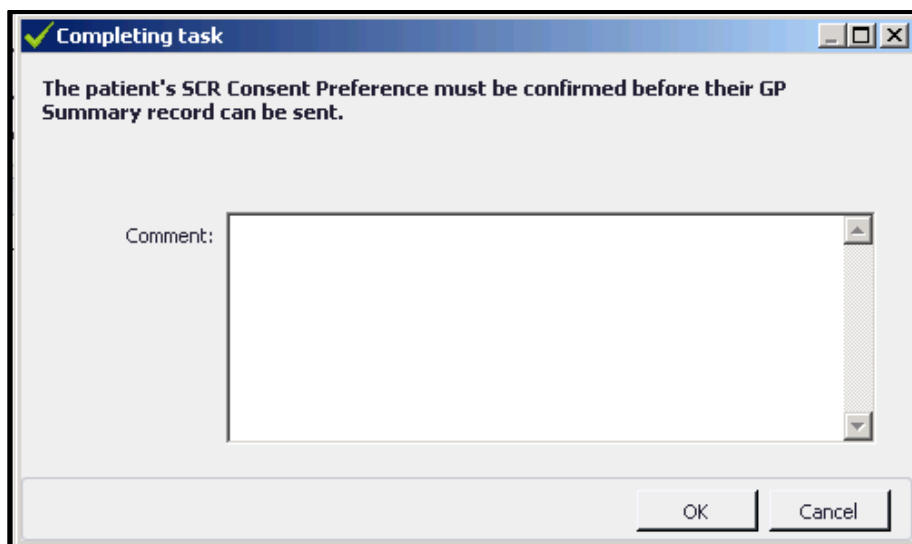
For patients with a consent preference of "Dissent" if the local consent record does not match the Spine an ACS mismatch is created each time the patient is selected in Consultation Manager until the consent mismatch is resolved. These messages are sent to all staff unless you have created a SCR group, see [Create a SCR Group in Control Panel](#) (page 99).

1. From **Daybook - To-do**, double click to open the **Consent (ACS) mismatch message**.

2. Select Consultation Manager  to open the patient's medical records. Check and resolve the patients consent details. See [SCR Quick Reference - Consent Model](#) for further details.



3. Return to the Daybook task and select , a comment can be added to the Comment box if required. For example, Patient dissent recorded. Select **OK**.




4. Select **Close**. The completed task can be viewed on the Tasks I've Actioned tab.

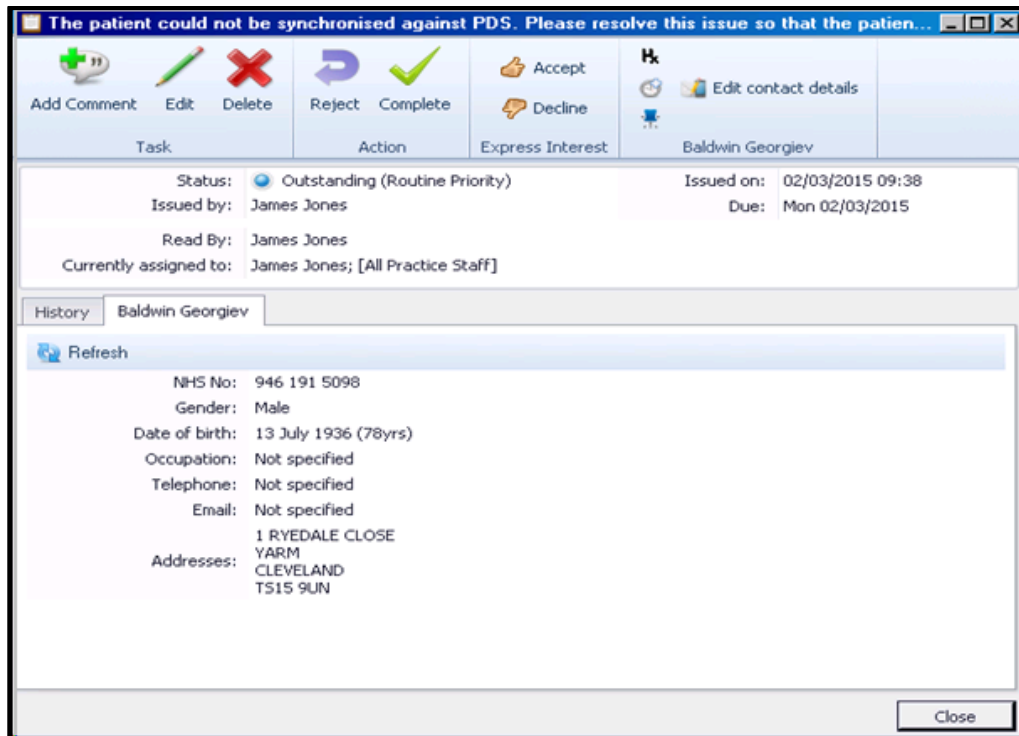
PDS Mismatches in Daybook

For patients whose local demographic details do not match the Spine, a PDS/Vision Mismatch displays each time the patient is selected until the PDS mismatch is resolved. If you choose to defer a mismatch, a SCR/PDS synchronisation is done automatically. If the patient is successfully synchronised "Identity Confirmed" displays in Consultation Manager, see [SCR PDS Synchronisation](#) (page 55) for further details. If unsuccessful, the patient is "Unlinked" and SCR updates cannot be sent until the mismatch is resolved.

This is sent to all staff unless a SCR group has been created, see [Create a SCR Group in Control Panel](#) (page 99).


To process a PDS Mismatch message:

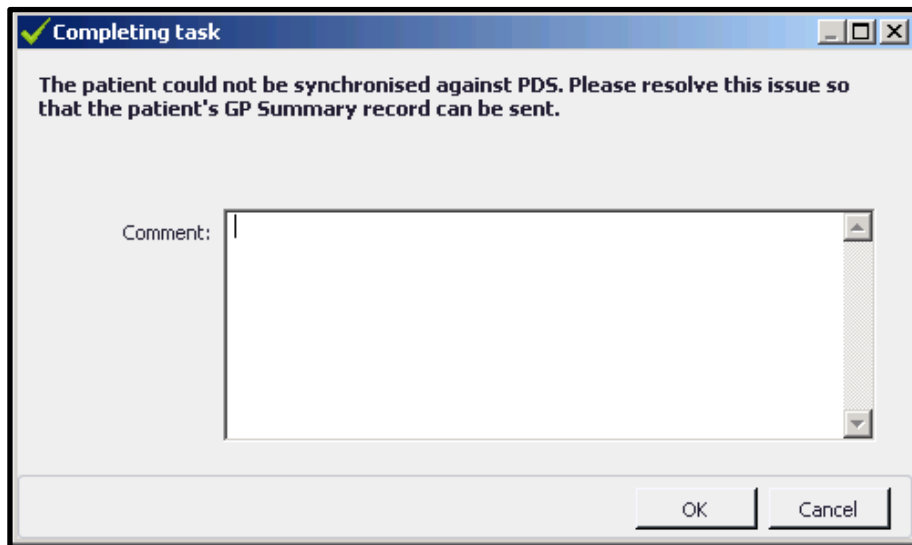
1. From **Daybook - To-do**, double click to open the **PDS mismatch task**.
2. Select Consultation Manager  to open the patient's medical records.



3. Check the PDS details displayed and Update if possible to resolve the mismatch.



- 4.** Return to the Daybook task and select **Complete** , a comment can be added to the Comment box if required. For example, Patient's address details updated. Select **OK**.



- 5.** Select **Close**. The completed task can be viewed on the Tasks I've Actioned tab.

Queued GP Summary Message were sent

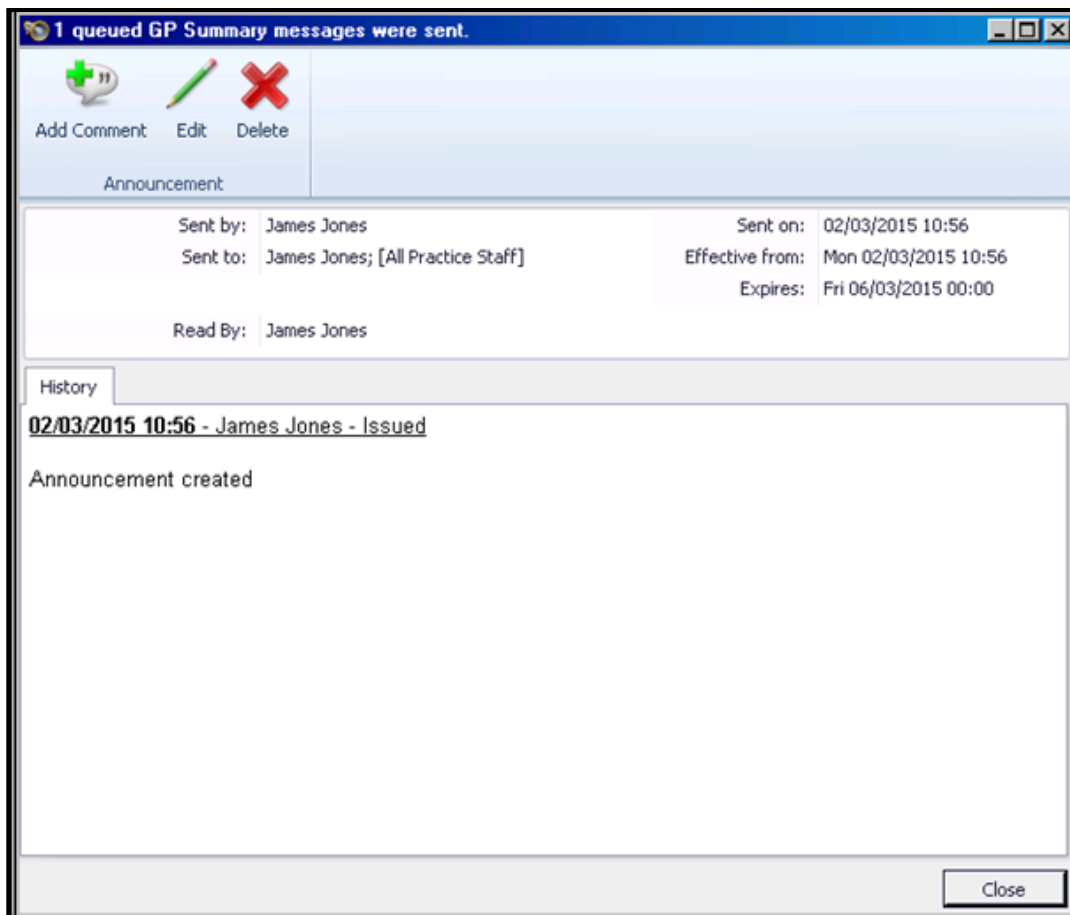
When a user works offline, any SCR updates are queued until the user next logs in with their Smartcard. When the queued message is successfully sent a Daybook notification is delivered to the originator of the SCR message to inform them their patient's SCR update has been sent. The notification may contain multiple patient details, dependant on the items queued.

This message is sent to the originator of the SCR update, it is not sent to the SCR group.

To process a Queued GP Summary notification:

- 1.** In Daybook, double click to open the Queued GP Summary notification.
- 2.** Check the details and add a comment if required.

Important - The notification expires in four days.



3. Select **Close** to finish.

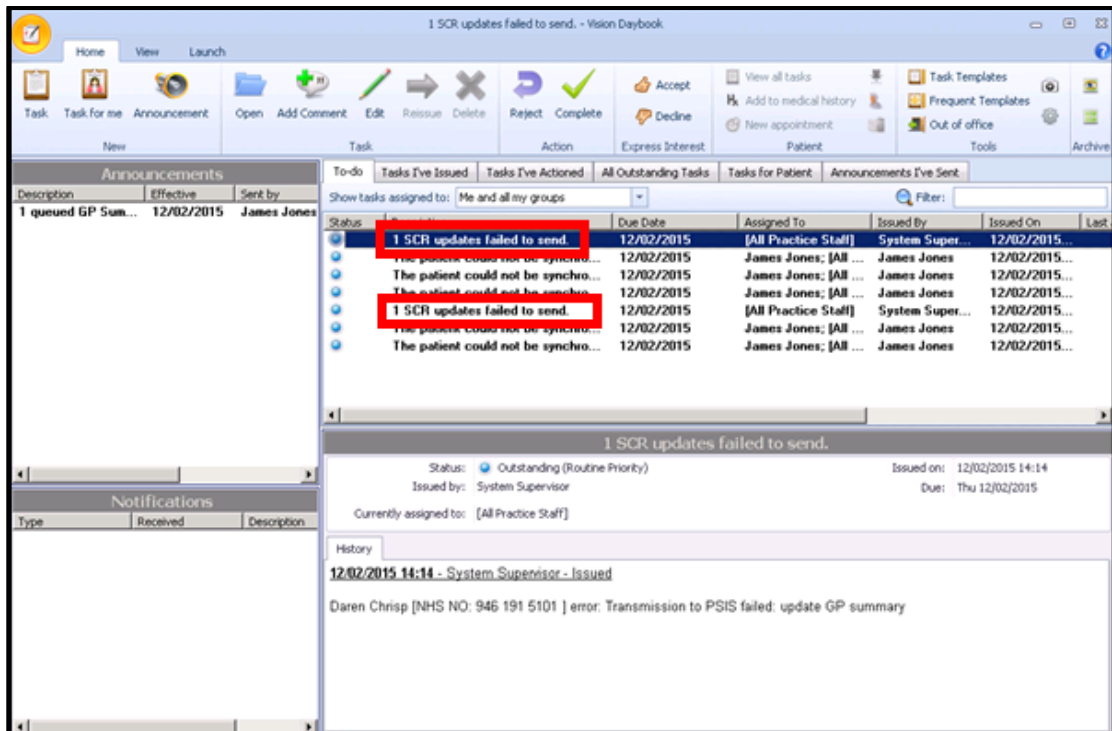
Transmission Errors

Daybook automatically creates a task when there is an error in transmitting SCR messages. The task may contain one or multiple errors. These tasks are sent to all users unless you have created a \$SCR group, see [Create a SCR Group in Control Panel](#) (page 99)

Contact the Vision Helpline for assistance to resolve these issues.

The following are examples of transmission errors:

- **Message too large** - The GP Summary message is too large to send (Max 5MB). The GP Summary must be configured so that it contains fewer clinical entries.
- **Withdrawal error** - There was an error when processing a withdrawal of the SCR message.
- **Retry exceeded limit** - An SCR message transmission was retried over 3 times.

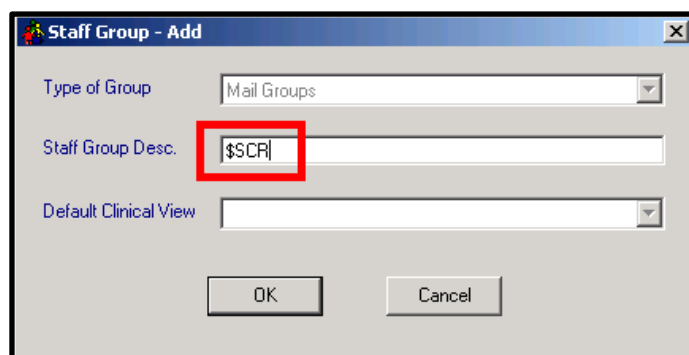


Create a SCR Group in Control Panel

To manage processing of Daybook notifications and tasks for SCR errors you must create a new group in **Vision - Control Panel - File Maintenance - Staff Groups - Practice** for SCR messages. You can assign specific admin staff to this group to resolve transmission errors and notifications sent to Daybook for SCR message failures, to avoid the notifications/tasks being sent to all staff.

To Create a Group

1. Go to **Vision - Control Panel - File Maintenance - Staff Groups**.
2. Right click on **Practice - Mail Groups** and select **Add Group**.



3. Type **\$SCR** in the Staff Group Description box.
4. Select **OK** to finish.
5. To add nominated staff to the group go to **Vision - Control Panel - File Maintenance - Staff Groups**.
6. Expand the Practice and Mail Groups folders, then right click on the **\$SCR** group and select **Add Staff Member(s)**.

- 7.** Highlight all staff you want to nominate to process Daybook notifications, hold down the CTRL button to multi-select. Select **OK** to finish.
- 8.** The staff are now added to the group and all Daybook notifications for SCR messages are sent to the listed staff for resolution, except for the "Queued SCR updates have been sent" messages which are always sent to the originator of the SCR update.

Sending National Summaries that are Queued

When a user is working offline any changes to summaries are updated and sent, but the message is queued. This can be sent automatically when the user next logs in with their Smartcard. Or an authorised member of staff with the appropriate RBAC role can access the Queued GP Summaries utility and authorise all currently queued messages.

Queued GP Summaries

The Queued GP Summary utility enables an authorised member of staff with the appropriate RBAC role to manually authorise and send any queued message(s) at the practice. Alternatively, the user with queued items can subsequently log in with their Smartcard, which automatically sends all of their queued messages. The Queued GP Summaries module lists all queued messages for all users at the practice.

Note - Smartcard login and RBAC business function B0380, is required to process queued message.

The Queued GP Summaries utility should be checked daily to ensure all SCR are sent.

Authorise Queued Summaries

To process queued messages:

Note - Summaries queued when a Clinician has not logged in with a Smartcard are automatically sent from the queue when the Clinician next logs in, unless they have already been manually authorised.



1. Go to **Vision - SCR - Queued GP Summaries**

Patient	Date	By	NHS Number	Status
LADWA, MAXIMILIAN (11/09/2000)	06 October 2014 12:29	Dr Harrison Forde	945 103 5680	Queued
BRIDDON, TATTON (12/04/2004)	06 October 2014 12:29	Dr Harrison Forde	945 103 5621	Queued
PHILPOT, BRANT (16/01/1999)	06 October 2014 12:31	Dr Harrison Forde	945 103 5672	Queued
HUNTBACH, JARED (23/04/1914)	06 October 2014 12:40	Dr Harrison Forde	945 103 1936	Queued
AUSTIN, COLBY (29/06/1939)	10 October 2014 11:14	Dr Harrison Forde	945 103 1944	Queued
FOURACRE, ANSELM (01/09/1975)	06 October 2014 16:22	Dr Harrison Forde	945 003 4818	Queued
BEAZELY, KEEFE (01/09/1975)	06 October 2014 16:24	Dr Harrison Forde	945 003 4087	Queued
TAHIR, WINSTON (01/09/1975)	06 October 2014 16:24	Dr Harrison Forde	945 003 4109	Queued
NUREEN, ANNABEL (09/11/1957)	06 October 2014 16:24	Dr Harrison Forde	945 003 3226	Queued
MEECHAN, HUMPHREY (29/05/1943)	07 October 2014 12:05	Dr Harrison Forde	945 002 7986	Queued
SCOVELL, DENNIS (31/12/1968)	07 October 2014 12:05	Dr Harrison Forde	945 002 9474	Queued
VINEY, LUCIAN (08/07/1948)	07 October 2014 12:05	Dr Harrison Forde	945 002 8176	Queued
CORNOCKS, CERI (18/06/1952)	07 October 2014 12:06	Dr Harrison Forde	945 002 8303	Queued
HENLEY, DESHAUN (01/09/1975)	07 October 2014 12:07	Dr Harrison Forde	945 003 5040	Queued
LOVENEY, MARYANN (28/07/1932)	07 October 2014 13:49	Dr Harrison Forde	945 001 8855	Queued
MALLABER, DEAN (01/09/1975)	07 October 2014 13:50	Dr Harrison Forde	945 002 2526	Queued
GORRIE, MO (01/09/1975)	07 October 2014 13:50	Dr Harrison Forde	945 002 2844	Queued
NEEDS, NORRIS (29/05/1943)	07 October 2014 13:59	Dr Harrison Forde	945 001 9630	Queued
PAJANARIOS, CYMBELINE (12/12/1...	07 October 2014 15:20	Dr Harrison Forde	945 103 6601	Queued

2. To process the queued messages select **Authorise All**.

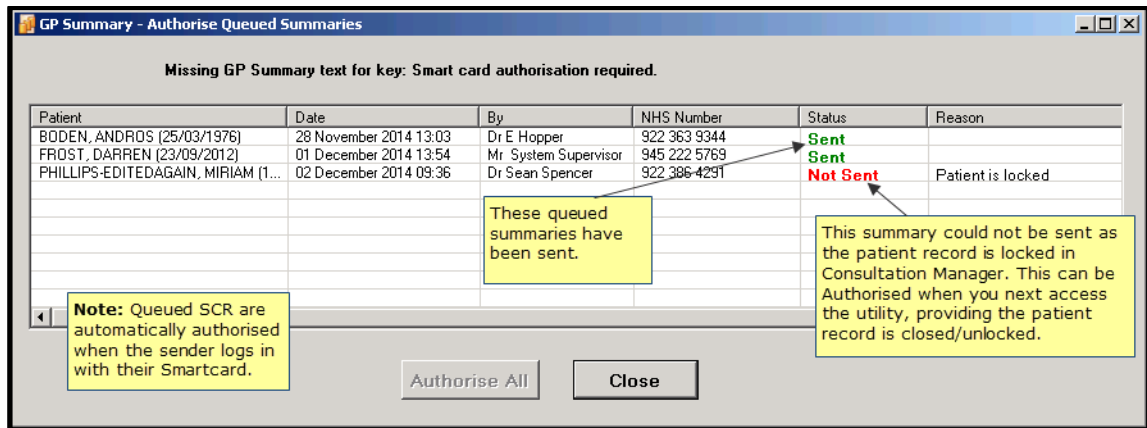
3. You are prompted "This action will authorise and transmit ALL listed summaries. Are you sure you wish to continue?" select **OK**.

GP Summary - Manual Send

? This action will authorise and transmit ALL listed summaries. Are you sure you wish to continue?

OK Cancel

4. A progress bar displays.



5. When completed, the status of each summary in the queue is updated.
6. Select **Close** to finish.

Note - When a member of staff leaves, check the Queued Summary utility and authorise any queued messages for that user.

SCR FAQs

When can I start recording consent status?

You can record patient preference and see a preview of the patient National Summary before the Initial Upload.

Are Face-to-Face Consultations Required?

Face to Face consultations are no longer a requirement for updating and sending a SCR. Core and additional information is automatically added to the National Summary during the data entry if you have the correct RBAC roles to do this. See [RBAC Roles used in SCR](#) (page 8)

Why can't I maintain a National Summary for the selected patient?

The ability to send or maintain a National Summary or to change a patients' preference or consent is determined many factors. Look through the following list and check that:

- The practice is enabled for National Summary.
- The practice is fully RBAC enabled.
- The patient qualifies for a structured summary. To qualify the patient should:
 - Be permanently registered with the practice,
 - Have a new style NHS number and
 - Be synchronised on the PDS
- You have user rights to view the patients record

What happens when patients turn 16 years old?

All patients under 16 years of age have a SCR by default.

Note - At the moment, all patients under 16 have a SCR on the Spine. A parent/guardian can request a SCR not to be shared or stored but the final decision lies with the GP.

When the patient is 15 years and 9 months, they are sent a letter detailing the concept of the SCR and informing them of the dissent options (which is similar to that sent to patients before the Initial Upload process). They have 16 weeks to think about this. If the patient does nothing, consent is assumed and a copy of the SCR remains on the Spine. After the patient turns 16 the SCR process and consensual rights are identical to that of other patients.

Can receptionists, nurses or other staff update a National Summary?

Anybody who has the user rights in Vision to add to the Consultation Manager module and has the relevant RBAC roles and functions added to their Smartcard can update a patient's National Summary.

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