

Detailed Coded Record Access

EMIS Action Plan



- **Third Party Information**

- Must be excluded as required by data protection act and common law duty of practice (same as with SARs)

- **Sensitive Codes**

- Examples include sexual & reproductive health, child and adult safeguarding, domestic violence and criminal activity
- These codes may need to be excluded or discussed with the patient prior to access to avoid upset or harm
- Relevant particularly to coercion and proxy access

- **Free Text**

- Whilst not required it can add meaning, especially to blood results. See later slide on free text.

From EMIS 5.8 it will be possible to choose which elements of the record have free text e.g. only shown for results.

ACTION PLAN- ENABLING DCRA WITHIN EMIS

WHERE APPROPRIATE CSU'S WITHIN YOUR AREA MAY BE AVAILABLE TO ASSIST YOU IN THIS

Practice agreement to enable made.

Clinical and managerial leads identified.

1. Ensure Policies and Procedures are in place:
 - a. [ID Verification](#)
 - b. Registration Process
 - c. [Proxy access](#), [Coercion](#) & [Children's Access](#)
2. Staff training & awareness of System Functionality
 - how to enable DCRA at specific levels within the System
 - a. Organisational Level
 - b. Patient Level
 - (Noting that there are some inconsistencies in the order of options)
3. Enable at an Organisational Level

Next Phase

1. Have an established process for screening notes for suitability of sharing
2. Pilot with known patient(s) – i.e. members of PPG, long term condition patients
3. Incorporate any changes/improvements that may be necessary following the Pilot phase
4. Promote Service to all Patients to encourage take up

Considerations before enabling DCRA

When you turn DCRA on at the practice level any patient that has DCRA enabled at the patient level will immediately get access to their detailed coded record.

- Only enable DCRA if
 - You are sure that none of your active patients have the DCRA setting enabled at the patient level **OR**
 - Patients with DCRA enabled have already been fully consented and had their record checked **OR**
 - Irrespective of patient settings you have already consented all patients for full record access and checked their record.

If you are unsure of what level of access your patients are set to then you can call support who will run a script in the background and give you a breakdown (note there is a known error with PFS searches in WEB so cannot be used at the moment within practices)

Enabling DCRA at the practice level


Relates to versions of EMIS before 5.8

From main menu choose System Tools -> EMAS Manager -> Patient Access


1. Detailed coded record

☒ Use detailed coded record settings
Detailed coded record will give patients access to problems, medications, laboratory test results, documents, allergies, consultations and immunisations.

2. Tick the box below to control the date from which free text is shown. If left unticked free text will not show at all.

☐ Only show free text on and after:
dd-MMM-yyyy 

3. Tick the box below to control the date from which documents will be displayed. If left unticked all documents will be displayed.

☒ Only show documents on and after:
31-Mar-2020 

1. Select the 'Use detailed coded record settings' radio box
2. Note that you need to leave the free text box **unticked**
3. The documents box must be **ticked** and then **click on the calendar icon**. Add a future date e.g. 31.3.2020. Note: do not manually write in a date as the system will not recognise it

Enabling DCRA at the patient level

- The settings at the patient level should be the same as settings at the practice level
- **Note there is some inconsistency in EMIS 5.5-5.7 and options appear in different orders on some screens**

When **registering** a patient for Patient Services for the very first time the document option comes first

Tick the box below to control the date from which documents will be displayed. If left unticked all documents will be displayed.

☒ Only show documents on and after:

31-Mar-2020

Tick the box below to control the date from which free text is shown. If left unticked free text will not show at all.

☐ Only show free text on and after:

dd-MMM-yyyy

When **editing** a patient who already has Patient Services the document option comes last (same as in EMAS)

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Tick the box below to control the date from which free text is shown. If left unticked free text will not show at all.

☐ Only show free text on and after:

dd-MMM-yyyy

Tick the box below to control the date from which documents will be displayed. If left unticked all documents will be displayed.

☒ Only show documents on and after:

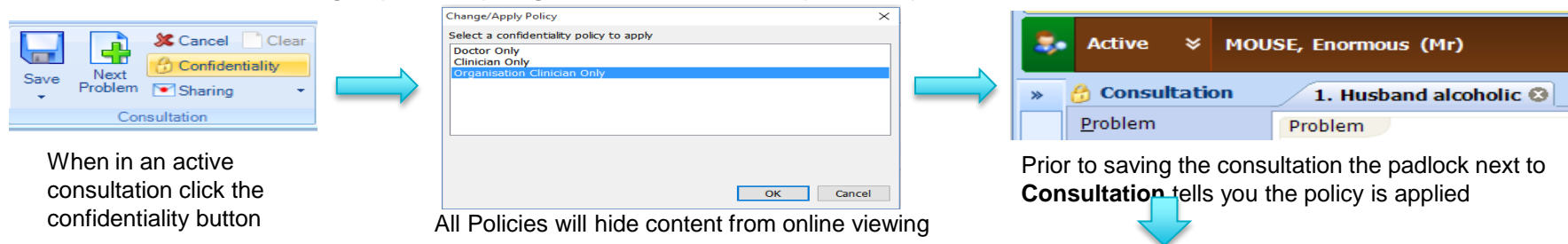
31-Mar-2020

**Ensuring a
patient's
notes are
ready to be
shared**



Redacting record details

- Elements of the patient record can be 'hidden' from the patient view where this is appropriate. This functionality will be enhanced in EMIS 5.9
- When entering a consultation it is possible to exclude the whole consultation from online viewing by applying a confidentiality policy (see screenshot)

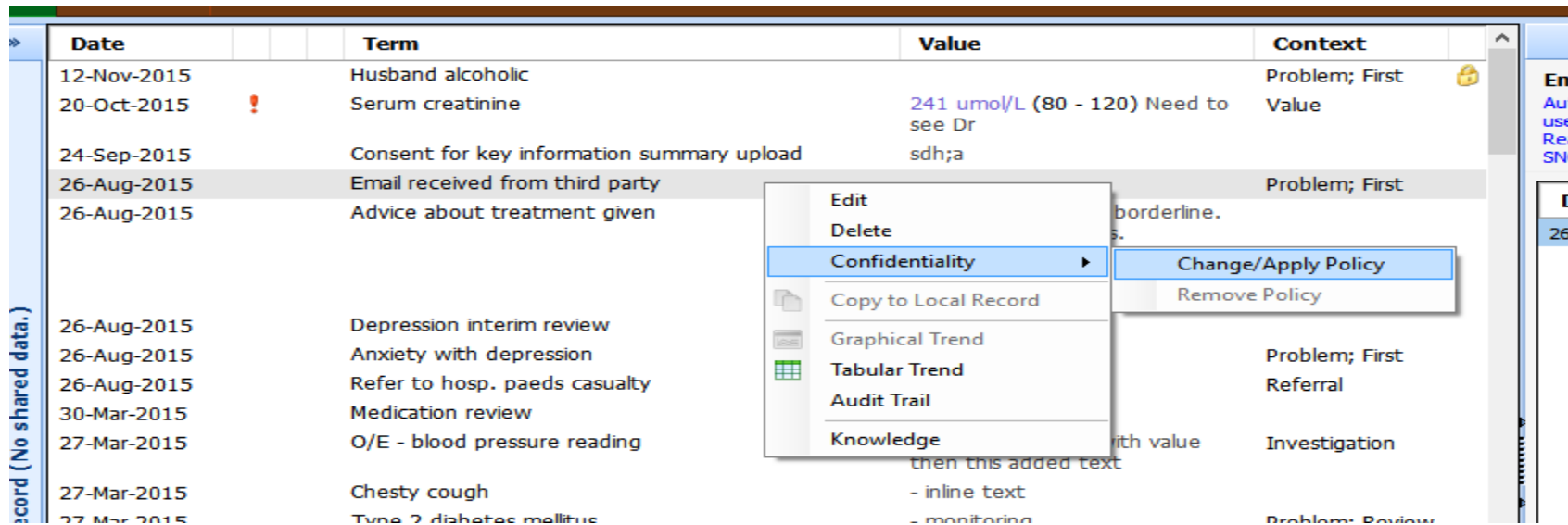


Date	Consultation Text	
12-Nov-2015	GP Surgery (Hall Green Health Centre)	WILLIAMS, Damian (Dr)
Problem	Husband alcoholic (First)	
History	Increasing problems with husband - increasing alcohol intake (a bottle of spirits a day + lager)	
	When drunk can be very violent - mostly verbal but sometimes physical.	
	Has tried to get husband to stop drinking but won't - says it's his only pleasure in life	
Comment	Discussed at length - difficult situation - doesn't have much support from family	
	Advised about alcohol services and how to self refer. Could also encourage husband to make appointment	
	Women's aid information given.	
26-Nov-2015	GP Surgery (Hall Green Health Centre)	WILLIAMS, Damian (Dr)

Prior to saving the consultation the padlock next to **Consultation** tells you the policy is applied

Redacting record details

- From the 'Care Record' view it is possible to select individual codes for redaction by right-clicking on them (free text can't be individually redacted unless it is attached to a read code – see next slide)



The screenshot shows the NHS Care Record interface. A table lists medical records with columns for Date, Term, Value, and Context. A right-click context menu is open over the record dated 26-Aug-2015 with the term 'Email received from third party'. The menu includes options like Edit, Delete, Confidentiality, Copy to Local Record, Graphical Trend, Tabular Trend, Audit Trail, and Knowledge. The 'Confidentiality' option is highlighted, and a sub-menu is visible with 'Change/Apply Policy' and 'Remove Policy'.

Date	Term	Value	Context
12-Nov-2015	Husband alcoholic		Problem; First
20-Oct-2015	Serum creatinine	241 umol/L (80 - 120) Need to see Dr	Value
24-Sep-2015	Consent for key information summary upload	sdh;a	
26-Aug-2015	Email received from third party		Problem; First
26-Aug-2015	Advice about treatment given		
26-Aug-2015	Depression interim review		
26-Aug-2015	Anxiety with depression		
26-Aug-2015	Refer to hosp. paed's casualty		Problem; First Referral
30-Mar-2015	Medication review		
27-Mar-2015	O/E - blood pressure reading		Investigation
27-Mar-2015	Chesty cough		
27-Mar-2015	Type 2 diabetes mellitus		

Selecting this brings up the same dialogue box for confidentiality policies as seen in the previous slide

Date	Consultation Text	
01-Jul-2015	Third party consultation (Burn Brae Medical Group)	GUY, Simon (Mr)
Problem	Confusion (First)	
History	Wife rang to discuss his apparent confusion. Very concerned, husband would be livid if he knew wife had been discussing this with GP.	
12-Sep-2014	Burn Brae Medical Group	GUY, Simon (Mr)
Document	Administration Administration from Northumbria Healthcare NHS Foundation Trust at NORTHUMBRIA HEALTHCARE NHS FOUNDATION TRUST (12-Sep-2014)	
08-Sep-2014	Burn Brae Medical Group	GUY, Simon (Mr)
Document	Administration Letter to patient	
01-Sep-2014	GP Surgery (Burn Brae Medical Group)	BURN BRAE MEDICAL, AT (Dr)
Problem	Stroke unspecified (First)	
Examination	Body mass index 24.7 kg/m2	
Medication	Aspirin 75mg dispersible tablets One To Be Taken Each Day 56 tablet	
Comment	Feeling really quite well after a prolonged stay in the mouse house	
Follow up	Diary Entry Stroke monitoring (01-Sep-2014 16:42)	
Additional	Systolic blood pressure 125 mmHg • Diastolic blood pressure 90 mmHg • O/E - height 180 cm • O/E - weight 80 kg • Serum cholesterol 4.7 mmol/L • Refer for CAT scanning • Medication review done • Referral to stroke clinic • Lifestyle counselling • Depression screen	
02-Aug-2014	GP Surgery (Burn Brae Medical Group)	GUY, Simon (Mr)
Problem	[X]Struck by thrown projectd/falling object occurrn on farm (Review)	
Examination	Much improved	
15-Jul-2014	GP Surgery (Burn Brae Medical Group)	GUY, Simon (Mr)
Problem	[X]Struck by thrown projectd/falling object occurrn on farm (First)	
History	Out walking in a farmers field and hit by farmers lunchbox thrown from a tractor.	
Examination	Minor head injury	

Problems

Medication

Test Results

Documents

Consultations

Immunisations

Allergies

Problems

Current problems

i	Stroke unspecified	Since: 01 Sep 2014
i	[X]Struck by thrown projectd/falling object occurrn on farm	Since: 15 Jul 2014

Past problems

No past problems recorded.

About your conditions

- ▶ **Stroke unspecified**
- ▶ **[X]Struck by thrown projectd/falling object occurrn on farm**

Enabling Free Text

Free text is not a GMS requirement but some practices may want to enable this as it gives the greatest value to the patient and makes the record more meaningful

Free text can be enabled with a 'from' date which some practices prefer. It means you don't have to screen historic free text and can put policies in place going forward

Care Record View

Active MOUSE, Enormous (Mr) Born 14-Feb-1977 (38y) Gender Male NHS No. Unknown					
Date	Term	Value	Context		
12-Nov-2015	Comment note	- Discussed at length - difficult situation - doesn't have much support from family Advised about alcohol services and how to self refer. Could also encourage husband to make appointment Women's aid information given.			
12-Nov-2015	History / symptoms	- Increasing problems with husband - increasing alcohol intake (a bottle of spirits a day + lager). When drunk can be very violent - mostly verbal but sometimes physical. Has tried to get husband to stop drinking but won't - says it's his only pleasure in life			
12-Nov-2015	Husband alcoholic		Problem; First		

If you attach free text to a read code then you can hide each individual element (as in this example). This would only be needed if redaction was needed

Useful codes

- 1 – History / Symptoms
- 12 – Family History
- 13Z – Social/Personal History
- 2Z – Examination / Signs
- 9b04 – Comment Note

Links to Resources

Main Websites

NHS England - <https://www.england.nhs.uk/ourwork/pe/patient-online/>

Interactive Support and Resources Guide:

<https://www.england.nhs.uk/wp-content/uploads/2015/11/po-support-resources-guide.pdf>

RCGP – <http://elearning.rcgp.org.uk/patientonline>

Specific Guidance

ID Verification - <http://elearning.rcgp.org.uk/course/view.php?id=181§ion=2>

Coercion - <http://elearning.rcgp.org.uk/course/view.php?id=181§ion=1>

Proxy Access - <http://elearning.rcgp.org.uk/course/view.php?id=181§ion=3>

Children and Young People - <http://elearning.rcgp.org.uk/course/view.php?id=181§ion=4>

Patient online Webinars:

<https://www.england.nhs.uk/ourwork/pe/patient-online/support/webinars/>

Documents and Forms (downloads)

<http://elearning.rcgp.org.uk/mod/page/view.php?id=4775>