Viewing Summary Care Records

Community Pharmacy System and Process
Aim

- Advise *how* to access SCRs using the SCR application (SCRa) (and detail process for Locums)

- Explain how to *interpret* the information held in the SCR (and what to do if there may be a problem)

- Check all is in place for you to access SCR
How to view SCRs
Steps to Viewing the SCR

In order to view the clinical information in the SCR, healthcare staff need to:

1. Use a smartcard with the correct role
2. Identify and locate the correct patient on the Spine
3. Have the patient’s permission to view their SCR
4. Have a legitimate relationship (LR) with the patient, i.e. be directly involved in their care
Smartcards

- To view the SCR, users will need a smartcard.
- The level of activity you can perform using your smartcard is controlled by what access you have been granted.
- A ‘sponsor’ authorises these access levels, such as the ability to view SCRs.
Access Spine portal

National Health Service Spine Portal

User Information
Welcome!
Dalingwater Yates
Last Update:
25 March 2011 10:41
719 minutes left
240 minutes max idle time

NHS Applications
You have access to the following applications. Select the one you would like to launch by clicking on the link.

Note that all applications are launched in a child window:

- Launch NCRS Smartcard Management Service
- Launch Spine User Directory
- Launch Enhanced Reporting Service
- Launch PDS Reports
- Launch Alert Viewer
- **Launch Summary Care Record (SCR)**
- Launch Demographic Spine Application
- Launch ACF Backoffice Service
- Launch Self Service Portal
- Launch User Identity Manager
- Launch User Terms and Conditions
Tips

• It is advisable to save the link on desktop/as a favourite/on intranet

• Check whether your system supplier has made it easier to access EG. positive solutions screen below
Finding the correct patient

The correct patient can be identified using one of the following:

- **NHS number** - the ideal identifier as it is unique for each patient.
- **Minimum search criteria** - surname, gender & date of birth
- **Advanced search criteria** - surname, gender, date of birth plus any extra available criteria available, e.g. date ranges, partial surname, postcode etc
Basic patient search

Find a patient
Please search for a patient by either entering details below or, if known, using NHS number below

Basic  Advanced

Enter patient details

Gender  Female  Male

Surname

Date of Birth

Full postcode  Postcode lookup

Find

Clear

Find by NHS Number

NHS Number

Clear

Tips on finding a patient using Basic search

- General search tips
- Summary
- Date of birth
- First name
- Additional information

Need more help?
- Help with this screen
- Tell me more about searching

Use of the NHS Summary Care Record is subject to confidentiality regulations.

Primary search criteria – preferred method. Identify from PMR?

Minimum search criteria
Advanced patient search

Find a patient
Please search for a patient by entering their details below

[Image of patient search form]

- **Gender**: Female, Male, Not Known, Not Specified
- **Surname**: Enter
- **Date of Birth**: From (use any date format)
- **Date of Death**: From
- **GP Practice code**: Enter
- **or GP (GNC) code**: Enter

Minimum search criteria plus additional fields which are available to perform an advanced search.
## Potential patients identified

### Patient List

9 patients match for **Female, smith, 01-Jan-1970 to 31-Dec-1970**

Can't see the patient you're looking for? **Refine search** Start again? **New search**

Select the patient to view their record.

<table>
<thead>
<tr>
<th>Name &amp; address</th>
<th>Date of Birth</th>
<th>Gender</th>
<th>NHS Number</th>
<th>Postcode</th>
<th>Practice Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Harriet Mary Janey Joe Joany NGACLIENTHP 16 Madeley Road, Ealing, London ** Warning: may be incorrect**</td>
<td>08-Jan-1970</td>
<td>Female</td>
<td>555 854 5259</td>
<td>W5 2LH</td>
<td></td>
</tr>
<tr>
<td>Jenny Wrren SMITH 3 MARITIME QUAY, LONDON ** Warning: may be incorrect**</td>
<td>12-Oct-1970</td>
<td>Female</td>
<td>941 401 8603</td>
<td>E14 3QH</td>
<td>E04012</td>
</tr>
<tr>
<td>Harriet SMITH 52 Lindfield Road, Ealing, London ** Warning: may be incorrect**</td>
<td>08-Jan-1970</td>
<td>Female</td>
<td>555 873 2245</td>
<td>W5 1QR</td>
<td></td>
</tr>
<tr>
<td>Hoggit Gbdh Samamamaman ** Warning: may be incorrect**</td>
<td>08-Apr-1970</td>
<td>Female</td>
<td>943 654 0582</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jenny SMITH UNKNOWN, NEWCASTLE ** Warning: may be incorrect**</td>
<td>01-Jan-1970</td>
<td>Female</td>
<td>555 888 1534</td>
<td>ZZ99 3WZ</td>
<td>D82015</td>
</tr>
<tr>
<td>Ian NGACLIENTIP (deceased) 48 Lindfield Road, Ealing, London ** Date of death 01-Feb-2011 ** Warning: may be incorrect</td>
<td>08-Jan-1970</td>
<td>Female</td>
<td>555 849 8862</td>
<td>W5 1QR</td>
<td>D82015</td>
</tr>
<tr>
<td>Jenny Wrren SMITH 3 MARITIME QUAY, LONDON ** Warning: may be incorrect**</td>
<td>12-Oct-1970</td>
<td>Female</td>
<td>941 401 8581</td>
<td>E14 3QH</td>
<td>E04012</td>
</tr>
<tr>
<td>Eva Jannat MENDEZ</td>
<td>30-Aug-1970</td>
<td>Female</td>
<td>943 632 0248</td>
<td>DE1 3QW</td>
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</tr>
</tbody>
</table>
Patient located

You can immediately see if the patient has an SCR available to view. Click “view SCR”

If they don’t have one, the box would look like this
Permission to view

- Permission to view can be asked individually, or on behalf of all pharmacists & technicians at the pharmacy.
- For example, you may ask for permission to view for “those who are involved in the your care when you come to this pharmacy”.
- A local process would be required to ensure that staff are aware that permission has already been granted so they do not need to ask again and can click ‘Yes’ when prompted by the system, eg. note in PMR.
- Local teams may require signed form to support other processes – please check*
Permission to View Your NHS Summary Care Record

Patient name and address:

DOB:

NHS No:

Your summary care record contains information from your GP health record such as your current prescription, allergies and any bad reactions to medication you have had in the past. It will also include your name, address, date of birth and your unique NHS Number to help identify you correctly.

The pharmacist involved in providing care to you today would like to view your Summary Care Record in order to provide the best possible care for you and have the most up to date information.

Only the pharmacist involved in your care will be able to see your record and on this occasion only.

When accessing your Summary Care Record the pharmacist will:

- need to have an NHS Smartcard with a chip and passcode (like a bank card and PIN);
- only see the information they need to do their job;
- Have their details recorded.
Permission to view

NHS Summary Care Record Access Management

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

Yes
View record

No
Access refused

Obtain permission for:
- Yourself only
- Your workgroup

The usual legal, ethical and professional obligations apply when accessing a patient's clinical record.

Emergency Access

Do you need to access the record for other reasons?

Other access options

Explicit permission to view a patients’ SCR must be gained and confirmed by clicking ‘Yes’.
Emergency access can be used if the patient is unable to provide their permission to view—e.g., patient is confused/does not understand.
Emergency access

When emergency access is used a brief explanation can be entered to explain why, this is useful the audit trail.
**Locums MUST**

- **Always** select emergency access
- Record the ODS code of branch you are accessing from
- Record the patient gave permission
ALWAYS select EMERGENCY ACCESS

NHS Summary Care Record Access Management

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

Yes
View record

Obtain permission for:
- Yourself only
- Your workgroup

No
Access refused

The usual legal ethical and professional obligations apply when accessing a patient's clinical record.

Emergency Access

Do you need to access the record for other reasons?

Other access options
ALWAYS add appropriate additional information

Enter here the ODS code of the branch access is being made, and confirm the patient did give permission to view record.

Branch FY467 Boots, The High Street, Sheffield
Patients explicit permission received
SCR viewed in SCR application

Time and date is clearly visible indicating when the GP Practice last updated the SCR

Medications, allergies and adverse reactions

- Allergies
  - 23 Nov 2011: Allergy to animal hair
  - 27 Sep 2011: Sensitivity to LATEX
  - 66 Sep 2011: Allergy to pollen
  - 08 Aug 2011: Drug groups primarily affecting cardiovascular syst allergy

- Adverse Reactions
  - 23 Nov 2011: Allergy to animal hair
  - 27 Sep 2011: Sensitivity to LATEX

- Acute Medications (For the 12 month period 23 Nov 2010 to 23 Nov 2011)
  - 13 Sep 2011: Restandol 40mg capsules (Organon Laboratories Ltd)
  - 09 Aug 2011: Erythromycin 250mg gastro-resistant capsules

- Current Repeat Medications
  - Last issued: 09 Aug 2011: Seona 7.5mg/5ml oral solution sugar free
  - Authorised (not issued): Omeprazole 40mg gastro-resistant capsules
SCR application viewing examples
Scenario 1 – Emergency supply

- Permission to view asked, granted and recorded on consent form
- Patient NHS number identified through PDS look-up on PMR
- SCR viewed
- Care recorded on PMR (LR evidence)
- Complete audit form
Find patient

- Ask the patient can you view their record and complete signed permission form
- Perform a PDS lookup for the patient on local PMR
- Copy NHS number
- Open the portal and SCR application
Find a patient

Please search for a patient by either entering their details or NHS number below

Find by NHS Number

NHS Number: 9436547315

Find
Find patient

The patient has an SCR

SCR Details:

- **Name:** Tiphanie MAGRATH
- **Gender:** Female
- **NHS Number:** 945 503 5723
- **Date of Birth:** 01-Jun-1978
- **Preferred Name:** Not recorded
- **Aliases:** Not recorded
- **Other Names:** Not recorded

**Addresses:**
- **Usual Address:** 1 Daleside Drive, Potters Bar, Herts, EN1 2LL
- **Correspondence Address:** Not recorded
- **Temporary Address:** Not recorded

**Contact Information:**
- **Telephone:** Not recorded
- **Email:** Not recorded
- **Fax:** Not recorded
- **Written Communication:** Not recorded
- **Contact Preferences:** Not recorded

**General Practice:** Parkfield Medical Centre

**Consent to share:** Implied Consent
Record permission to view

NHS Summary Care Record Access Management

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

Yes

View record

Obtain permission for:
- Yourself only
- Your workgroup

No

Access refused

The usual legal ethical and professional obligations apply when accessing a patient's clinical record.

Emergency Access

Do you need to access the record for other reasons?

Other access options
### Allergies and Adverse Reactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>23 Nov 2011</td>
<td>Allergy to animal hair Added 23/11/11</td>
</tr>
<tr>
<td>27 Sep 2011</td>
<td>Sensitivity to LATEX</td>
</tr>
<tr>
<td>08 Sep 2011</td>
<td>Allergy to pollen For re-test</td>
</tr>
<tr>
<td>08 Aug 2011</td>
<td>Drug groups primarily affecting cardiovascular syst allergy DO NOT USE THIS PATIENT</td>
</tr>
</tbody>
</table>

### Acute Medications (For the 12 month period 23 Nov 2010 to 23 Nov 2011)

<table>
<thead>
<tr>
<th>Type</th>
<th>Date</th>
<th>Medication Item</th>
<th>Dosage Instructions</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescribed Elsewhere</td>
<td>Entered: 13 Sep 2011</td>
<td>Restandol 40mg capsules (Organon Laboratories Ltd)</td>
<td></td>
<td>28</td>
</tr>
<tr>
<td>Acute Medication</td>
<td>Prescribed: 09 Aug 2011</td>
<td>Erythromycin 250mg gastro-resistant capsules</td>
<td>take one 4 times/day</td>
<td>28 capsules</td>
</tr>
<tr>
<td>Supporting Information: Dental Med. Dental Med</td>
<td>Supporting Information: 3.2 link with pitting oedema which is not for inclusion to the scr 3.2 link with pitting oedema which is not for inclusion to the scr</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Current Repeat Medications

<table>
<thead>
<tr>
<th>Type</th>
<th>Date</th>
<th>Medication Item</th>
<th>Dosage Instructions</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Medication</td>
<td>Last issued: 09 Aug 2011</td>
<td>Senna 7.5mg/5ml oral solution sugar free</td>
<td>2x5ml spoon at night</td>
<td>150 millitres</td>
</tr>
<tr>
<td>Supporting Information: 3.3 3.3</td>
<td>Supporting Information: Repeat/Unknown Date / Med start date 'Clear/NHS Issue'. Repeat/Unknown Date / Med start date 'Clear/NHS Issue'</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Repeat Medication</td>
<td>Authorised (not issued):</td>
<td>Omeprazole 40mg gastro-resistant capsules</td>
<td>take one daily</td>
<td>7 capsules</td>
</tr>
</tbody>
</table>
Complete entry in PMR

- Detail advice given/action taken

Complete Audit form

Summary Care Record – Community Pharmacy
Proof of Concept Exercise

This audit form is designed to be used every time the SCR is accessed. Thank you for your assistance.

| Patient number | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 |
|----------------|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|

**Section A. Time of use**

1. 'In hours' (i.e. when the GP surgery is open Mon – Fri 8am-6pm)
2. Out of hours (i.e. evenings/weekends, when the GP surgery is closed)

**Section B. Scenario in which SCR was used (select one)**

3. Emergency supply required
4. Treating minor ailments
5. Provision of new medicines / dispensing a prescription
6. Other

**Section C. Reason for checking SCR**

7. Check allergy status
8. Check contraindications / interactions
9. Check details of a medication the patient was unsure about
10. Other

**Section D. Consequences**

11. SCR provided information which would otherwise have been unknown?
12. SCR enabled an intervention without which could have resulted in a prescribing error
13. Please state the potential consequences had the intervention not been made using the following categories (based on NPSA consequence scoring):
   1. Negligible
   2. Minor
   3. Moderate
   4. Major
   5. Catastrophic

Thank you for your assistance.
Scenario 2 – LOCUM access
- Permission to view asked, granted and recorded on consent form
- Patient NHS number identified
- EMERGENCY access selected
- Detail ODS code of branch, *plus*
  Permission To View received
- SCR viewed
- Care recorded on PMR
- Complete Audit
Find patient

- Ask the patient can you view their record and complete signed permission form
- Perform a PDS lookup for the patient on local PMR
- Copy NHS number
- Open the SCR application as appropriate
Find patient

Find a patient
Please search for a patient by either entering their details or NHS number below

Basic  Advanced  Postcode

Enter patient details

* Gender  ○ Female  ○ Male
First name  [first name or name the patient is known by]
* Surname
* Date of Birth
  Full postcode  Postcode lookup

Clear  Find

Find by NHS Number

NHS Number  9436547315
Clear  Find

Tips on finding a patient using Basic search

- General search tips
- Surname tips
- Date tips
- First name tips
- Address finder tips

Need more help?
- Help with this screen
- Tell me more about searching

Use of the NHS Summary Care Record is subject to confidentiality regulations. Some actions will raise a privacy alert.

More about privacy alerts
Find patient

### Key demographic information

**Name**

- **Usual Name**: Mrs. Tiphanie Indy MAGRATH
- **Preferred Name**: Not recorded
- **Alias**: Not recorded
- **Other Names**: Not recorded

**Address**

- **Usual Address**: 1 Daleside Drive, Potters Bar, HERTS EN1 2LL
- **Correspondence Address**: Not recorded
- **Temporary Address**: Not recorded

**Gender**: Female

**NHS Number**: 945 503 5723

**Date of Birth**: 01-June-1978

**Birth Order**: Not recorded

**Place of Birth**: Not recorded

**Language**: Not recorded

**General Practice**: Parkfield Medical Centre

**Consent to share**: Implied Consent

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### Contact Information

- **Telephone**: Not recorded
- **Email**: Not recorded
- **Fax**: Not recorded
- **Contact Preferences**: Not recorded

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**The patient has an SCR** [View SCR]
NHS Summary Care Record Access Management

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

Yes
View record

Obtain permission for:
- Yourself only
- Your workgroup

No
Access refused

The usual legal ethical and professional obligations apply when accessing a patient's clinical record.

Emergency Access

Do you need to access the record for other reasons?

Other access options
ALWAYS add appropriate additional information

Enter here the ODS code of the branch access is being made, and confirm the patient did give permission to view record.
View SCR

Nigella SCOFFINS  |  Date: 23-Jan-1973  |  Gender: Female  |  NHS: 944 914 3870

GP Summary

Clinical correspondence

Summary created: 23 Nov 2011 18:06

Created by: Zak Bickham

LAURIE PIKE HEALTH CENTRE, 1 Troy Road, Horsforth, Leeds LS18 5TN

Allergies and Adverse Reactions

<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
</table>
| 23 Nov 2011| Allergy to animal hair  
Added 23/11/11  
Sensitivity to LATEX  
08 Sep 2011  
Drug groups primarily affecting cardiovascular syst allergy  
DO NOT USE THIS PATIENT  |
| 08 Aug 2011| Allergy to pollen  
For re-test  |

Acute Medications (For the 12 month period 23 Nov 2010 to 23 Nov 2011)

<table>
<thead>
<tr>
<th>Type</th>
<th>Date</th>
<th>Medication Item</th>
<th>Dosage Instructions</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescribed Elsewhere</td>
<td>13 Sep 2011</td>
<td>Restandol 40mg capsules (Orgonon Laboratories Ltd)</td>
<td>od</td>
<td>20</td>
</tr>
<tr>
<td>Acute Medication</td>
<td>09 Aug 2011</td>
<td>Erythromycin 250mg gastro-resistant capsules</td>
<td>take one 4 times/day</td>
<td>20 capsules</td>
</tr>
</tbody>
</table>

Current Repeat Medications

<table>
<thead>
<tr>
<th>Type</th>
<th>Date</th>
<th>Medication Item</th>
<th>Dosage Instructions</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Repeat Medication</td>
<td>09 Aug 2011</td>
<td>Senna 7.5mg/5ml oral solution sugar free</td>
<td>2x5ml spoon at night</td>
<td>150 millilitres</td>
</tr>
<tr>
<td>Repeat Medication</td>
<td>(not issued)</td>
<td>Omeprazole 40mg gastro-resistant capsules</td>
<td>take one daily</td>
<td>7 capsules</td>
</tr>
</tbody>
</table>

Supporting Information: 3.2 link with pitting oedema which is not for inclusion to the scr. 3.2 link with pitting oedema which is not for inclusion to the scr.
Complete entry in PMR

- Detail advice given/action taken

## Complete Audit form

**Summary Care Record – Community Pharmacy**

**Proof of Concept Exercise**

This audit form is designed to be used every time the SCR is accessed. Thank you for your assistance.

### Name / location of Site

<table>
<thead>
<tr>
<th>CCG</th>
</tr>
</thead>
</table>

### Time Period of Audit

| Start Date : |
| Finish Date : |

<table>
<thead>
<tr>
<th>Patient number</th>
<th>E.G.</th>
<th>1</th>
<th>2</th>
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<tbody>
<tr>
<td>Section A. Time of use</td>
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<td>1</td>
<td>'In hours' (i.e. when the GP surgery is open Mon – Fri 8am-6pm)</td>
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<td>2</td>
<td>Out of hours (i.e. evenings/weekends, when the GP surgery is closed) ✔</td>
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<td>Section B. Scenario in which SCR was used (select one)</td>
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<td>3</td>
<td>Emergency supply required ✔</td>
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<td>4</td>
<td>Treating minor ailments</td>
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<td>Provision of new medicines / dispensing a prescription</td>
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<td>6</td>
<td>Other</td>
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<tr>
<td>Section C. Reason for checking SCR</td>
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</tr>
<tr>
<td>7</td>
<td>Check allergy status</td>
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<td>Check contraindications / interactions</td>
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<td>9</td>
<td>Check details of a medication the patient was unsure about ✔</td>
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### Section D. Consequences

| SCR provided information which would otherwise have been unknown? ✔ |
| SCR enabled an intervention without which could have resulted in a prescribing error ✔ |

| Please state the potential consequences had the intervention not been made using the following categories (based on NPSA consequence scoring) |
| 1 Negligible |
| 2 Minor |
| 3 Moderate |
| 4 Major |
| 5 Catastrophic |

2
Interpreting the SCR
Context of the data within the SCR

- Users should be reminded that SCR is a summary and not a full detailed care record for the patient.
- The SCR may not contain all information for a patient e.g. medications prescribed outside of the GP Practice.
- Information held within the SCR is a summary of the information from a patient’s GP practice at the time it was created. This is indicated by the date and time stamp on the SCR.
- Users should therefore check for subsequent information as part of their normal history taking.
Updated SCR requirements

- GP system suppliers are in the process of upgrading their systems to make improvements to the way that SCRs are displayed and updated.
- During this period you are likely to encounter patients with the old SCR view and patients with the updated view.
- Differences:
  - Last issue date
  - Discontinued repeat medications possible views: correct, also recorded (correctly) in actual repeat meds, or not available
  - Acute meds for 6 months or 12 months
Old SCR view
Updated SCR view
Remember……

- SCR is sourced ONLY from the GP practice record – if they don’t add meds prescribed elsewhere on their system, then they will not be on the SCR.
- If there is doubt about the SCR update at the practice being assigned to the right patient record (ie. significant demographic discrepancy) then this will not be sent. This may mean SCR looks out of date. Check the date created.
- Some SCRs may have additional information present that is over and above the “core” information. The exact content will vary from patient to patient as it is the patient that controls what additional information is added.
- If you identify out of date information for a recent record update, contact patients GP practice.
- You MUST NOT access SCR with someone else’s smartcard!!!
Are you ready?

☑️ Do you have a Smartcard? Have you tested it?
☑️ Have you requested the correct roles to be added, and have they been?
☑️ Do you know how to access the SCR web page from your pharmacy computers?
☑️ Do you know your local process for supporting legitimate access monitoring?
☑️ Are you confident in asking the patient their permission to view their SCR?
☑️ If you are a Locum, do you understand you MUST always select “emergency access” and detail the branch you are accessing from?
☑️ Are you confident you could answer patient questions, or point them in the right direction for support?
☑️ Do you know where to escalate smartcard or access issues?
Questions?

If you have ANY questions at all, contact:

- Local project support
- Local IT helpdesk
- National SCR support – sharonwilson@hscic.gov.uk
- Regional team, eg. Numark, regional managers
Viewing Summary Care Records