



# National Patient Access Records

A Guidance Document for Practices

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# Accelerating patient access to their record

Enabling patients to view their medical record through the NHS App and other online services	Guidance
<p>• From April 2022, patients with online accounts such as through the NHS App will be able to read new entries in their health record as well as: full text, results and documents that patients will prospectively receive. This applies to patients whose practices use the TPP and EMIS systems. Arrangements with practices which use Vision as the clinical system are under discussion.</p> <p>This is an NHS England programme supported by NHSX and NHS Digital.</p> <p>The change supports NHS Long Term Plan commitments to provide patients with digital access to their health records. It means GPs will need to consider the impact of each entry, including documents and test results, as they add them to a patient's record. Patients will not see personal information – such as positive test results – until they have been checked and filed, giving GPs the chance to contact and speak to patients first.</p> <p>We also aim to enable patients to request their historic coded records in 2022 through the NHS App.</p> <p>Research shows that increasing numbers of patients want easy access to health information about them, including 80% of the 20 million NHS App users. Better access supports patients as partners in managing their health, and can help reduce queries to general practice such as on negative test results and referral letters.</p> <p>The change also supports existing <b>GMS contract</b> requirements to promote and offer online patient access to all future information, unless exceptional circumstances apply.</p>	<p><a href="#">Accelerating patient access to their record – by NHS Digital</a></p>
<p>*For further information provided by NHS Digital, including what practice staff should know, the resources, support and guidance on offer, plus details from a patients' perspective, please see the above guidance link on the right.</p>	

# Joint NHS England and BMA statement: Online access to Digital GP records 2019/20

Joint NHS England and BMA statement: Online access to Digital GP records 2019/20	Guidance
<ul style="list-style-type: none"> <li>● A somewhat dated statement issued jointly by NHSE and the BMA is available to read by clicking on the guidance link on the right.</li> <li>● It was initially planned for new registrants would have full online access to prospective data from April 2019, but this has since been delayed. The statement confirmed that prospective access to full records would be subject to the same safeguarding information requirements as applied to Detailed Coded Record (DCR) access and includes comments on               <ul style="list-style-type: none"> <li>*Safeguarding</li> <li>*Sensitive information</li> <li>*Third party information</li> </ul> </li> </ul>	<a href="#">The NHSE &amp; BMA joint statement for: Online access to Digital GP records 2019/20</a>
<p>* Further information supporting the implementation of prospective records access, the detailed coded record (DCR) and GP online services is available in the pages below.</p>	

# Risks, Exemptions and Serious Harm Test

## Risks, Exemptions and Serious Harm Test

### • Risks

- \*A limited time-frame in which GP Practices are being asked to implement the programme, when GPs and practice staff are already stretched.
- \*3<sup>rd</sup> party data – GP data controllers have a duty of confidentiality to other people who may be mentioned as part of the health record.
- \*Potentially harmful data, including safeguarding data.
- \*Errors in the health record.
- \*Patients not understanding the data held in their record.

### • Exemptions

As dictated in the GDPR and the DPA 2018, there are certain exemptions which would dictate you do not share data with a patient. These are:

- \*Health data processed by a court.
- \*Child abuse data.
- \*Data which could potentially cause serious harm.

### • Serious Harm Test

\*The serious harm test can only be conducted by a health professional. GPs must consider whether disclosure of the data would be “likely to cause serious harm to the physical or mental health of the data subject or another individual.”

# GP online services

## Support and Resources Guide

GP online services Support and Resources Guide	Guidance
<p>● The guidance document on the link provides a range of information and advice to GP Practices for providing patients with access to their record. The following information can be found in the document for:</p> <ul style="list-style-type: none"> <li>*Practice Managers – <b>pages 4 to 10</b></li> <li>*GP online services Communications Toolkit &amp; Contract – <b>pages 11 &amp; 12</b></li> <li>*Practice reception team including information for patients and accessible information – <b>pages 13 to 20</b></li> <li>*GPs – <b>page 21</b></li> <li>*Practice Nurses – <b>pages 22 &amp; 23</b></li> <li>*Accessible information standard – <b>page 24</b></li> <li>*RCGP guidance and toolkit – <b>page 25</b></li> </ul> <p>The remainder of the document includes: case studies and benefits, a time saving calculator, about GP online services, why patients want it, why the NHS are doing it, in general practice today, why and how, how you can be supported and a glossary and terminology section.</p> <p><b><u>What general practice staff should know</u></b></p> <ul style="list-style-type: none"> <li>● General practice staff should:           <ul style="list-style-type: none"> <li>● be aware that patients will be able to see their future records</li> <li>● know how to manage this as a change to your workflow - ensuring sensitive information is redacted as it is entered onto the clinical system, or in rare circumstances know when it may be inappropriate to give a patient access to their record.</li> </ul> </li> </ul> <p><b><u>What general practice staff should know</u></b></p> <ul style="list-style-type: none"> <li>● A series of training sessions to support staff with these changes are available. Please <a href="#">book onto the session here</a> most relevant to your role.</li> </ul>	<p><a href="#">GP online services Support and Resources Guide</a></p>
<p>* Further information supporting the above can be found in the above guidance link on the right.</p>	

# Prospective record access guidance

Prospective record access guidance	Guidance
<ul style="list-style-type: none"><li>• Prospective record access guidance has been developed by NHS England and BMA General Practitioners Committee in England to support GP practices in meeting the commitment to give new registrants with full online access to prospective data, subject to existing safeguards for vulnerable groups and third party and system functionality</li></ul> <p>To view the guidance, please click on the link on the right.</p>	<p><a href="#">Prospective record access guidance</a></p>

# Patient online services toolkit and NHS App guidance

Patient online services toolkit and NHS App guidance	Guidance
<ul style="list-style-type: none"><li>• The patient online toolkit has been written by the RCGP with NHS England. It is for GPs, nurses and practice staff to offer patient online services to patients effectively, efficiently, safely and securely. The toolkit also includes clinical examples which demonstrate how online services can empower patients to take greater control of the management of their health conditions as part of a person-centred approach to care. This is general guidance that was developed before the changes giving people access to future information.</li><li>• Find additional <a href="#">primary care guidance on the NHS App</a>. Existing guidance and materials are available to support administrative staff with these changes.</li></ul>	<a href="#">Patient services online toolkit</a>



# Guidance and materials available to support administrative staff with these changes

Guidance and materials available to support administrative staff with these changes	Guidance
<ul style="list-style-type: none"> <li>● This <a href="#">NHS website guide</a> is for patients on what health services are available online and how to use these services to manage their own health care needs.</li> <li>● Meanwhile, the link on the right contains further guidance as follows:</li> </ul> <p><b>*Patient guidance materials</b> - This is a set of <a href="#">downloadable patient</a> materials, some in easy read format. You can use these to help patients understand how GP online services work and how to use them to take more control of their health care.</p> <p><b>*Patient case studies</b> - Several <a href="#">patient videos</a> describing how access to GP online services such as GP record and online test results, helps patients to better manage different health conditions and surgery staff explaining how access to GP online services is revolutionising and improving care for patients with long term medical conditions. There are also videos on promoting online services.</p> <p><b>*Giving patients online access to their medical records</b></p> <ul style="list-style-type: none"> <li><b>*What records access will be given to patients</b></li> <li><b>*Will patients automatically see all new information about them</b></li> <li><b>*Patients access to past or historic records</b></li> <li><b>*General practice as the sole data controller</b></li> <li><b>*Updates to the general practice Data Protection Impact Assessment</b></li> <li><b>*Patients understanding their medical records</b></li> </ul> <p>If you have any questions or would like to discuss anything within this guidance document further, please e-mail: <a href="mailto:england.NHSXimplementation@nhs.net">england.NHSXimplementation@nhs.net</a></p>	<p><a href="#">Guidance and materials to support admin staff</a></p>

# Exporting Patient Medical Records

## Patient Medical Records

- Patients will effectively be able to perform their own GP summary. See below for EMIS patient Access functionality (other online services providers like Evergreen Life etc. work similarly)
- Generating a PDF record using the export function as shown in the screenshot below will look similar to an EMIS GP brief summary, with full text consultations as far back as the patient is approved access.

Export Record

Exporting your medical record does not include any date range filters you may have applied. Exported files will contain sensitive information from your medical record. It is your responsibility to ensure that any files you download are stored securely and protected from unauthorized access. By exporting and downloading files from Patient Access, you agree to the [terms and conditions](#).

Select sections to export

<input type="radio"/> Allergies	<input type="radio"/> Consultations
<input type="radio"/> Immunisations	<input type="radio"/> Medications
<input type="radio"/> Problems	<input type="radio"/> Test results

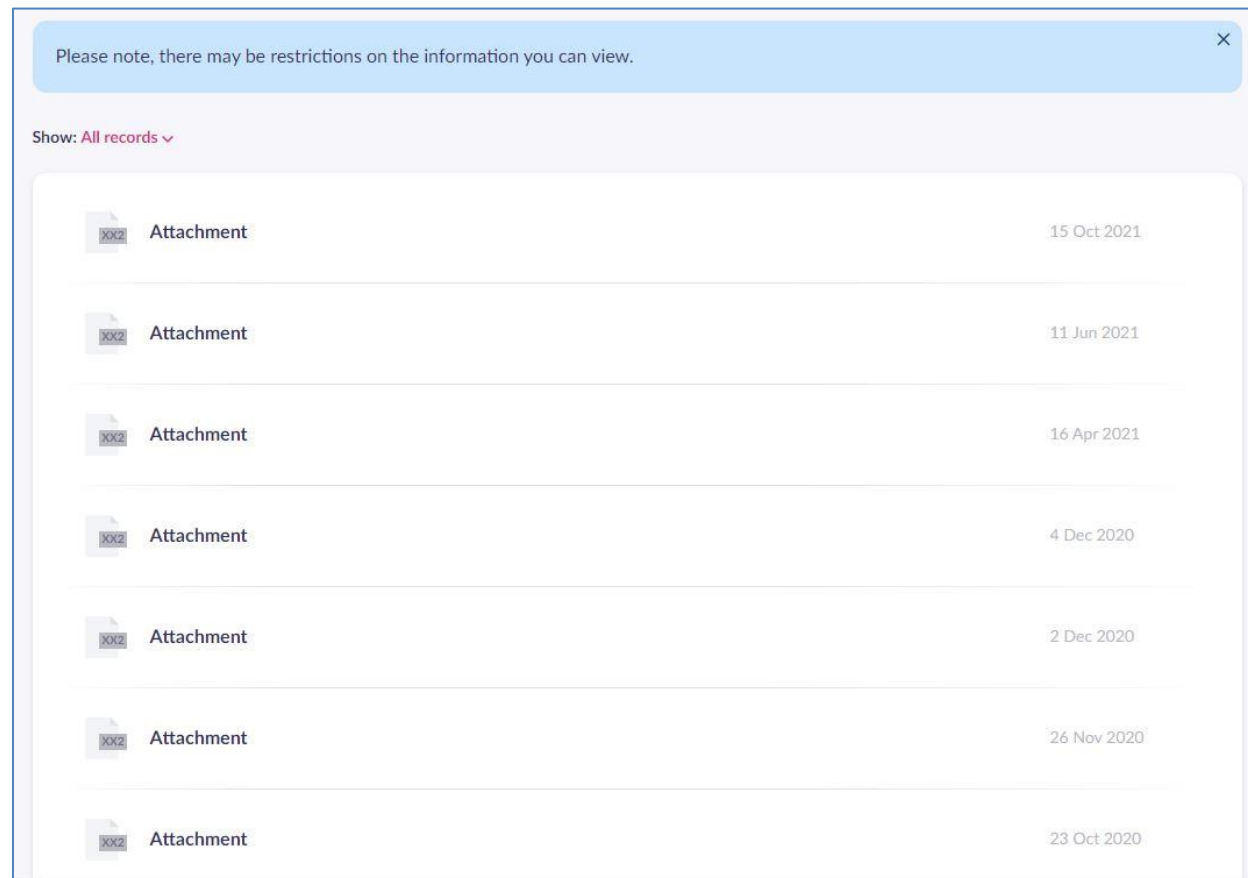
Select export format

<input checked="" type="radio"/> PDF	<input type="radio"/> XML	<input type="radio"/> JSON
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# Medical Record Documents – (part one)

## Medical Record Documents – part one

- The “Documents” section will display as shown in the below screenshot. Letters will be displayed but none will have actual titles and are all labelled ‘attachment’. When a single letter is opened, the patient can read the whole letter and will be able to click for “comments”. This is NOT the GPs Docman filing comment for example: “no action required” or “completed” (or freetext such as “already discussed with patient”):



# Medical Record Documents – (part two)

## Medical Record Documents – part two

- The “document title” is as shown in EMIS documents (see below):



- It has been suggested that if EMIS/online services providers could surface the title in the above screenshot so that it shows on the previous screenshot on page 10, this would avert many queries from patients stating that they cannot tell which letter is which.
- The problem is not unique to EMIS patient access – the same applies for alternate provider of patient online service (e.g. Evergreen Life).

# Redaction in the TPP system

## Redaction in the TPP system

- Redact information from the Patient New Journal view – this can be selected and deselected here:

The screenshot shows the TPP system interface. At the top, there is a menu bar with options like Patient, Appointments, Reporting, Audit, Setup, Links, Clinical Tools, Workflow, User, System, and Help. Below the menu bar is a toolbar with icons for Search, Task, Discard, Save, Details, Next, Acute, Note, Appts, and Home. On the right side, there is a patient information box showing 'A N Other', '02 Nov 1979 (36 y) F', and '1 Anytown, Anywhere'. Below the patient information is a search bar and a 'GMS' button. The main area is titled 'New Journal' and contains a list of journal entries. A context menu is open over the entry for 'Tue 30 Sep 2014', showing two options: 'Show in the online record' and 'Do not show in the online record'. A red arrow points to the 'Do not show in the online record' option. A blue arrow points from the bottom text to the 'Do not show in the online record' option. The journal entries include dates, times, and descriptions of events, such as 'Surgery: ANDERSON, AM (Dr) (GP Senior Partner)', 'Seasonal influenza vaccination contraindicated (XaZ0j) (Ongoing Episode)', and 'Current Home Address: Mulberry Cottage, Fore Lane, Bicker, Boston PE20 3AZ'.

- Select here to hide or to unhide information. NB: Applying Privacy Settings “X” will not hide from online view.

# How to review what the patient will see

## How to review what the patient will see

- Custom filters will show what a patient can view following screening and possible redaction of data. By not applying filters, this would show only to the practice, both redacted and unredacted information. The filters do not show Test Results:

The screenshot displays a medical software interface for a patient named Mr T Patient, born 02 Nov 1979 (36 y) F, residing at 1 Anytown N331XX. The interface shows a 'New Journal' section with a list of entries. A 'Custom Filter' dropdown menu is open, showing options: 'Custom Filter', 'Clinically Relevant', 'Admin Events', 'Online Full Clinical Record', and 'Online Detailed Coded Record'. The journal entries include:

- Sat 20 Sep 2014 00:00 - Surgery: ANDERSON, AA. Blood pressure procedure.
- Tue 30 Sep 2014 00:00 - Surgery: ANDERSON, AA. Seasonal influenza vaccination contraindicated (XaZuj) (Ongoing Episode).
- Mon 09 Feb 2015 00:00 - Surgery: ANDERSON, AM (Dr) (GP Senior Partner). Serum fasting total cholesterol (XaLuo) 6 mmol/L (Ongoing Episode).
- Fri 26 Jun 2015 Unknown. Current Home Address: Mulberry Cottage, Fore Lane, Bicker, Boston PE20 3AZ.
- Thu 03 Dec 2015 19:03 - Surgery: RENWICK, Kay (Other Community Health Service). Online message from RENWICK, Kay to RAJA, Anantarat (Mrs): The practice has granted RAJA, Anantarat (Mrs) access to the following services: Detailed Coded Record. Online message from RENWICK, Kay to RAJA, Anantarat (Mrs): The practice has removed RAJA, Anantarat (Mrs)'s access to the following services: Detailed Coded Record, Identity Verification, Vouching (personal) by RENWICK, Kay. Recorded during online services registration.
- Thu 03 Dec 2015 19:03 - Surgery: RENWICK, Kay (Other Community Health Service). SystemOne Incoming Record Sharing consent changed to: Yes. SystemOne Outgoing Record Sharing consent changed to: Yes.
- Thu 10 Dec 2015 11:29 - Surgery: RENWICK, Kay (Other Community Health Service).

# Enabling prospective access in System One/TPP

## Enabling prospective access in System One/TPP

- Patients will only see their record from the date entered. If a patient has previously had access to their detailed coded record (DCR), the historical part of their record will no longer be available. To set up default practice setting, navigate to the patient access section:

Set up - Users & policy - Organisational preferences - Online services - Patient Record Access

**Then tick the buttons:**

Enable full clinical record access - Consultations from the date of consent onwards - Add the date from which prospective access starts in the Default data record.

The screenshot shows the 'Organisation Preferences' dialog box with the 'Patient Record Access' section selected in the left-hand navigation pane. The 'Full Clinical Record' section is highlighted with a red box. In this section, the 'Enable full clinical record access' checkbox is checked. Below it, the radio button for 'consultations from the date of consent onwards' is selected, while 'all consultations' is unselected. The 'Default date record will be visible from' dropdown is set to '27 Sep 2016'. The 'Allow patients to request access to their records via SystemOnline' checkbox is unselected. Other sections visible include 'Summary Record Access' (checked), 'Detailed Coded Record' (unchecked), 'Audit Information' (unchecked), and 'Test Results' (message: 'You have a new test result that you can view.'). The 'Sharing Information' section has 'Enable viewing consent to share settings' unselected. At the bottom are 'Restore Defaults', 'Ok', and 'Cancel' buttons.



# Docman user guide for Patient Visibility Functionality Abbreviations and FAQs

## Docman user guide for Patient Visibility Functionality and FAQs

- Please click on the below links to take you to our website to obtain both a copy of the Docman guidance, as well as a set of FAQs:

[Docman user guide for Patient Visibility Functionality](#)

[Abbreviations](#)

(The above link will take you to a list of medical abbreviations.  
(Please place this link on your website for the benefit of your patients)

[FAQs](#)





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