



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
<ul style="list-style-type: none"> • 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>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 GMS contract requirements to promote and offer online patient access to all future information, unless exceptional circumstances apply.</p>	<p>Accelerating patient access to their record – by NHS Digital</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"> • A somewhat dated statement issued jointly by NHSE and the BMA is available to read by clicking on the guidance link on the right. • 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"> *Safeguarding *Sensitive information *Third party information 	The NHSE & BMA joint statement for: Online access to Digital GP records 2019/20
<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.
- *3rd 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"> *Practice Managers – pages 4 to 10 *GP online services Communications Toolkit & Contract – pages 11 & 12 *Practice reception team including information for patients and accessible information – pages 13 to 20 *GPs – page 21 *Practice Nurses – pages 22 & 23 *Accessible information standard – page 24 *RCGP guidance and toolkit – page 25 <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><u>What general practice staff should know</u></p> <ul style="list-style-type: none"> ● General practice staff should: <ul style="list-style-type: none"> ● be aware that patients will be able to see their future records ● 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. <p><u>What general practice staff should know</u></p> <ul style="list-style-type: none"> ● A series of training sessions to support staff with these changes are available. Please book onto the session here most relevant to your role. 	<p>GP online services Support and Resources Guide</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">• 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 <p>To view the guidance, please click on the link on the right.</p>	<u>Prospective record access guidance</u>

Patient online services toolkit and NHS App guidance

Patient online services toolkit and NHS App guidance	Guidance
<ul style="list-style-type: none">• 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.• Find additional primary care guidance on the NHS App. Existing guidance and materials are available to support administrative staff with these changes.	Patient services online toolkit

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"> • This NHS website guide is for patients on what health services are available online and how to use these services to manage their own health care needs. • Meanwhile, the link on the right contains further guidance as follows: <p>*Patient guidance materials - This is a set of downloadable patient 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>*Patient case studies - Several patient videos 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>*Giving patients online access to their medical records</p> <ul style="list-style-type: none"> *What records access will be given to patients *Will patients automatically see all new information about them *Patients access to past or historic records *General practice as the sole data controller *Updates to the general practice Data Protection Impact Assessment *Patients understanding their medical records <p>If you have any questions or would like to discuss anything within this guidance document further, please e-mail: england.NHSXimplementation@nhs.net</p>	<p>Guidance and materials to support admin staff</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

☐ Allergies

☐ Consultations

☐ Immunisations

☐ Medications

☐ Problems

☐ Test results

Select export format

☒ PDF

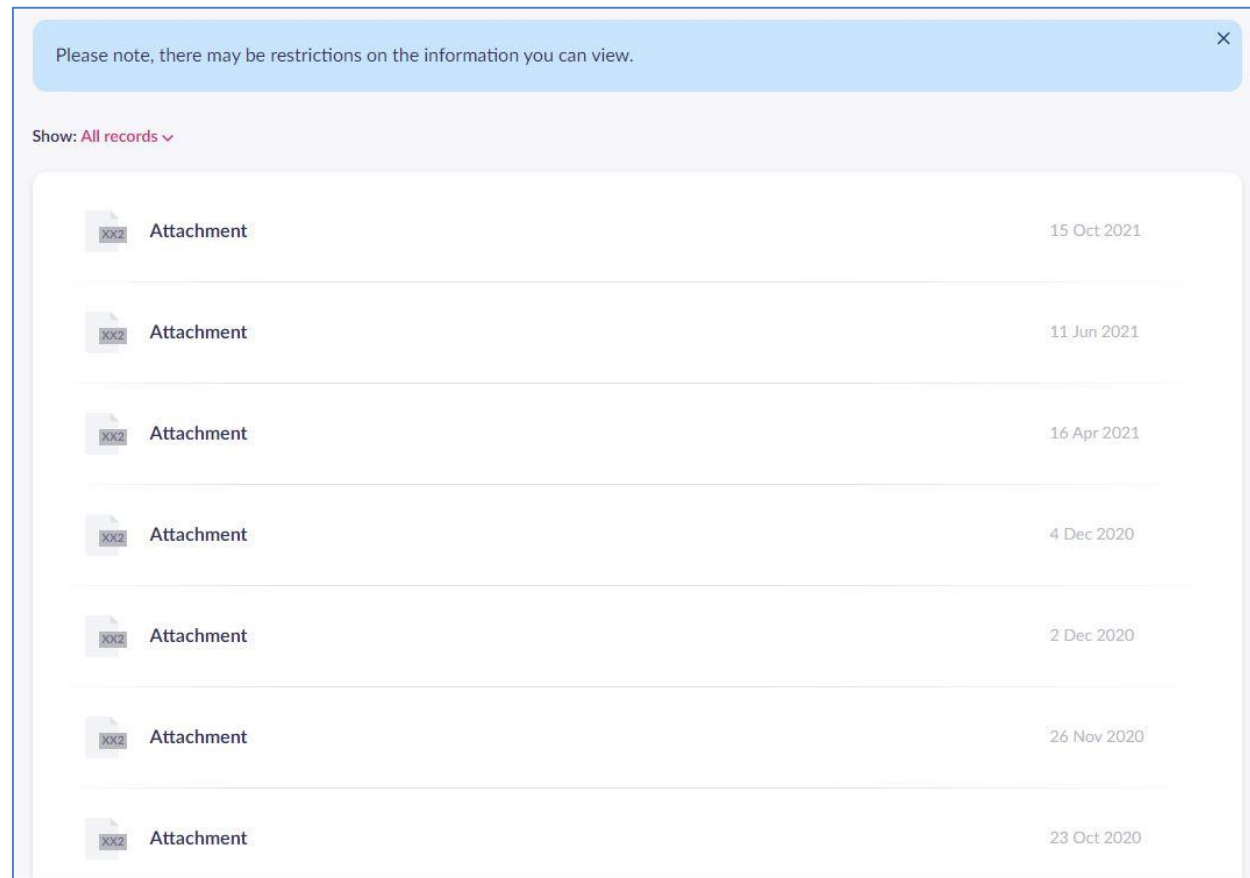
☐ XML

☐ JSON

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):

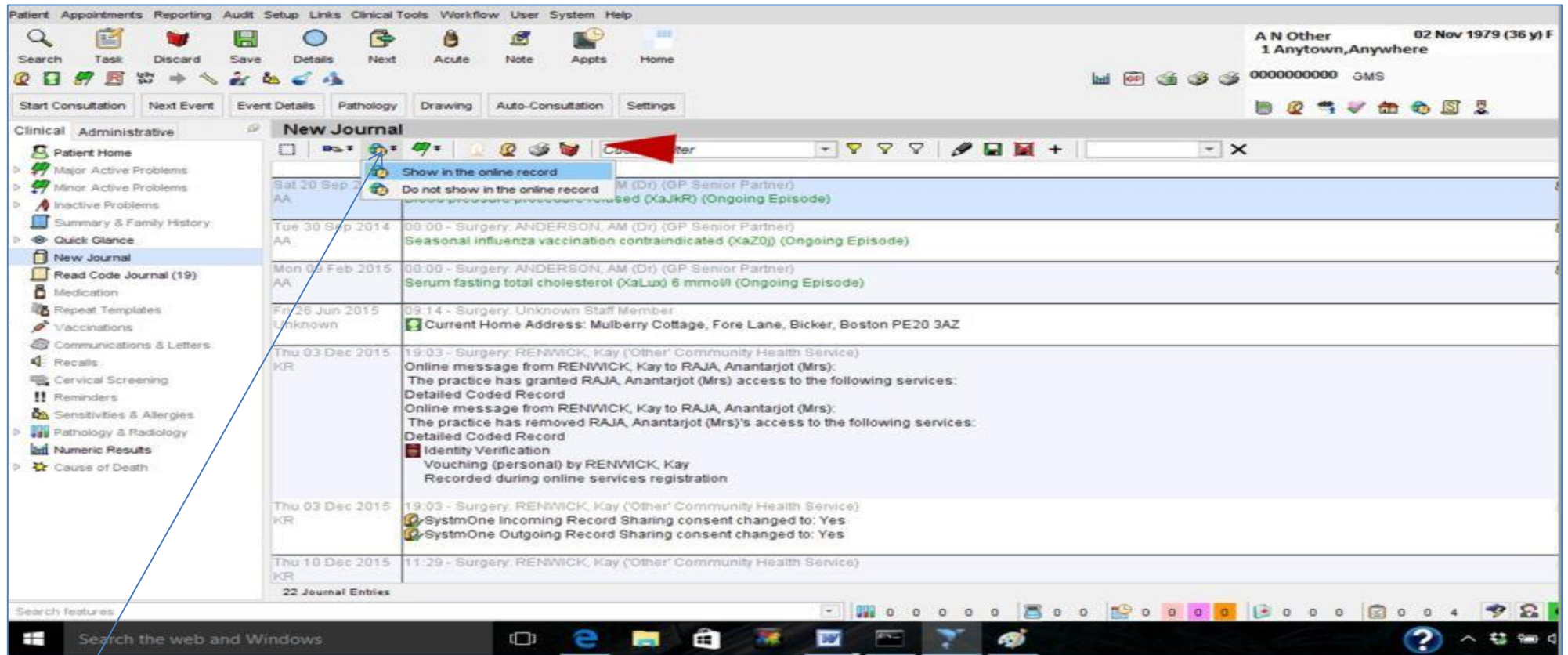


- It has been suggested that if EMIS/online services providers could surface the title in the above screenshot so that it shows on the previous screenshot on page 10, this would avert many queries from patients stating that they cannot tell which letter is which.
- The problem is not unique to EMIS patient 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:

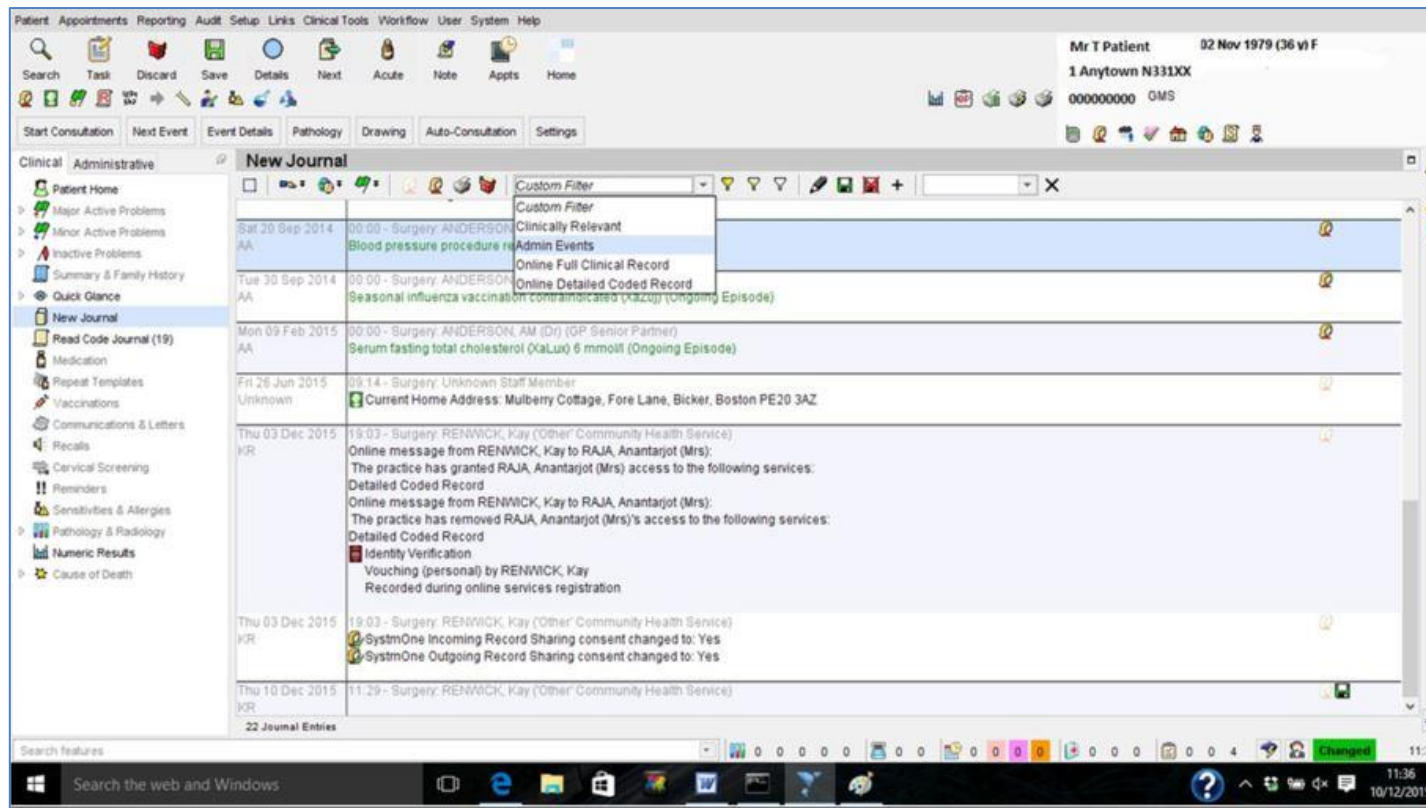


- Select here to hide or to unhide information. NB: Applying Privacy Settings "X" will not hide from online view.

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:



How to Hide or Redact from online view (1)

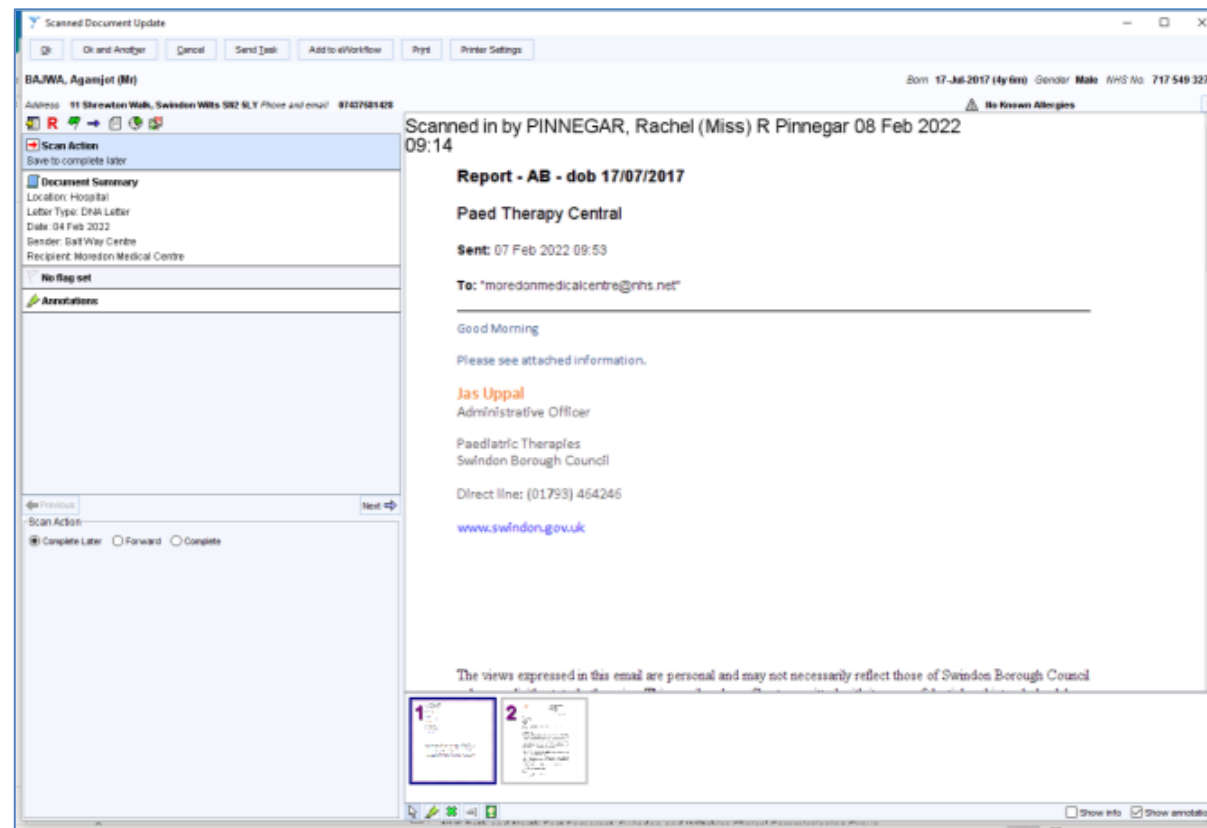
How to Hide or Redact from online view (1)

- **Marking Documents as Hidden from Online View**

When an entry has been marked as not for online access, it will be represented by the following icon: 

- **Removing from patient online access whilst the document is being processed:**

1. Within the “documents inbox”, click on the document that you wish to process. This will take you to the “scanned document update screen”:



How to Hide or Redact from online view (2)

How to Hide or Redact from online view (2)

- **Removing from patient online access whilst the document is being processed:**

2. If it is evident upon reading the document that it needs to be hidden from patient online access you cannot do this from the “scanned document update screen” where you are viewing/reading the document; **you will need to switch to the patient record to do this.**

3. To change to the patient record screen, you will need to minimise the “scanned document update screen,” and click on the name/address of the patient in the top right-hand corner of the “documents inbox,” to bring up the patient record.

4. Please note, if you have more than one screen, you will be able to have the “documents inbox” on one screen and the “scanned document update screen” on the other. In this case, you will be able to click on the name/address in the right-hand corner of the “documents inbox” screen directly to bring up the patient record, without having to minimise the “scanned document update screen.”

5. Once in the patient record, you will need to find the document entry within the new journal. It will have the words “document workflow not completed” to the right of it and it will not yet be visible in the patient record.

eb 2022 Pinengar	<p>A&E to Abbey Meads Medical Group</p> <p>Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)</p> <p>Paediatrician Letter to Abbey Meads Medical Group (document workflow not completed)</p> <p>Surgery: PINNEGAR, Rachel (Miss) (Systems Support Access Role) , Entered By: PRITCHARD, Charlotte (Mrs)</p> <p>Seen in accident and emergency department (9H19.)</p>
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6. Right click on the date/time of the New Journal entry and choose “do not show in the online record.”

10 Feb 2022	10:09 - Surgery: Dr Mich H: Child is cause for co	Amend Details View Amendments View For Date Filter Part of Shared Record Mark Event as Private Safeguarding Relevant Do not show in the online record Link to Appointment or Visit... Show Journal Entry	s Role)	
10 Feb 2022	10:13 - Surgery: Dr Mich H: Child in family is safe		s Role)	
10 Feb 2022	10:16 - Surgery: Dr Mich H: child in need Record contains third pa Safeguarding Swindo Child Safeguarding Child is on a Child in Subject of child in need		s Role)	

How to Hide or Redact from online view (3)

How to Hide or Redact from online view (3)

• Removing from patient online access whilst the document is being processed:

7. The entry should now have a world with a red cross through it at the right-hand side to show that it is not visible online:

10/2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	
negar	Paediatrician Letter to Abbey Meads Medical Group	
10/2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	
negar	Paediatrician Letter to Abbey Meads Medical Group (document workflow not completed)	
10/2022	Surgery: PINNEGAR, Rachel (Miss) (Systems Support Access Role) - Entered By: PRITCHARD, Charlotte (Mrs)	

8. You can now go back to the “scanned document update screen” and finish processing the document. When you complete this, it will not be visible to the patient.

• Removing in retrospect:

If a document is already saved within a patient's record and is subsequently identified as requiring hiding from online access, this is the process for removing from online visibility:

1. Find the entry in the new journal
2. Right-click on the date/time
3. Select “do not show in the online record:”

	Ability to comprehend (Xa8Kx) Ability to reason (XaA2l) Lack mental capacity make decision Mental Capacity Act 2005 (Xa4G3) Ability to communicate needs and wishes (Xa4G3) No consent for electronic record sharing (XaKll)	
10/2022	14:51 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access) Communications - Swindon. N-Z A Referral Letter to Unknown A Referral Letter to Unknown	<div> Part of Shared Record </div> <div> Mark Event as Private </div> <div> Safeguarding Relevant </div> <div> Do not show in the online record </div> <div> Link to Appointment or Visit... </div> <div> Show Journal Entry... </div> <div> Problems </div>

4. Please note that a document *cannot* be made “not-visible” to a patient online via either the “communications and letters” section nor the “record attachments” section. It can only be done through the above steps 1-3 in the new journal.

How to Hide or Redact from online view (4)

How to Hide or Redact from online view (4)

• Surgery Processes

Each surgery organises the processing of documents in a slightly different way. It is recommended that each surgery reviews how they process their documents in light of the above, and before the launch of the accelerating patient online access.

Marking consultations as private or hidden from online view:

The screenshot displays the 'Privacy Settings' page within a support desk interface. The breadcrumb trail at the top reads: 'Support Desk / All Solutions / Triage + Key Information / Key Information'. The page title is 'Privacy Settings' with a printer icon. The main heading is '1. Private & Safeguarding Events'. Below this, two definitions are provided: 'What is a 'Private Event'? An event that is only seen at your GP Practice & hidden from other organisations.' and 'What is a 'Safeguarding Relevant' event? An event that is only seen by staff with [Safeguarding Access Rights](#)'. A 'To do this:' section lists two methods: 'From Template: Click 'Other Details' or 'Change Privacy'' and 'From Tabbed Journal: Click the 'Hand Icon''. Below the text, there are two screenshots. The first shows a 'Safeguarding - Children' event in a 'Tabbed Journal' with a 'Change Privacy' button highlighted. The second shows a 'Tabbed Journal' interface with a 'Hand Icon' highlighted, which opens a dropdown menu with options: 'Show in the online record' and 'Do not show in the online record'. The page concludes with a feedback question: 'Did you find it helpful? Yes No'.

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. On the left is a tree view of settings categories. The 'Patient Record Access' category is selected. The main panel on the right contains several sections:

- Summary Record Access:** ☒ Enable summary patient record access
- Detailed Coded Record:** ☐ Enable detailed coded record access. Below this, radio buttons for 'all consultations' and 'consultations from the date of consent onwards' (selected). A date dropdown is set to '01 Nov 2015'.
- Full Clinical Record:** This section is highlighted with a red box. It contains ☒ Enable full clinical record access. Below this, radio buttons for 'all consultations' and 'consultations from the date of consent onwards' (selected). A date dropdown is set to '27 Sep 2016'. There is also an unchecked checkbox for 'Allow patients to request access to their records via SystmOnline'.
- Audit Information:** ☐ Allow access to patient record audits
- Test Results:** A text field for 'Patient message for new test results' containing 'You have a new test result that you can view.'
- Sharing Information:** ☐ Enable viewing consent to share settings

At the bottom of the dialog are buttons for 'Restore Defaults', 'Ok', and 'Cancel'.

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](#)

Offering patients access to their future health information (update: July 2022)

Offering patients access to their future health information (update: July 2022)	Guidance
<ul style="list-style-type: none"> • In line with the NHS Long Term Plan and ‘Data Saves Lives’ Data Strategy, the NHS is working to make it easier for patients to digitally access their future health information in their general practice records. In April 2020 NHS England introduced an obligation for practices to give patients access to their prospective (future) medical record online (including free text and documents). <p>Better access to health information enables patients to become partners in managing their health. Evidence has shown that this increases patients’ feelings of autonomy and reduces the need for patients to contact general practice¹.</p> <p>There is now a revised timeline for the automatic switch on of prospective access. On 01 November 2022, patients at practices using TPP and EMIS systems will automatically have access to their prospective records online. Work is ongoing with Cegedim (previously Vision) to create the same functionality. This does not change the status of general practices as a data controller or alter existing obligations to promote and offer access to historic information.</p>	<p>Offering patients access to their future health information (21 July 2022 – PR1821)</p>
<p>*For further information, please see the letter in the guidance link, above right.</p>	

Summary of information/guidance for GP practices on Patient Access to Records

Summary of information/guidance for GP Practices on Patient Access to Records		
Title	Link	Description
Accelerated Patient Access to General Practice Records - Blueprint	Accelerated Patient Access to General Practice Records - Blueprint	Explanation of the programme, designed to support practices in preparing for system changes. It incorporates learning from early adopter sites, provides best practice and signposts to further support resources
Record Access GP Readiness checklist	Record Access GP Readiness checklist	A checklist to support practices in preparing for the upcoming changes. It signposts to relevant resources
Giving patients access to GP records	Giving patients access to future general practice records - YouTube	Video on what giving patients access to their records will achieve (video length 3 minutes)
Why & when to redact from online view (making information not visible)	Why and when to make information not visible in patient records - YouTube	Video giving examples of when it might be appropriate to mark information as not visible for online view (redact) (video length 3 minutes)
When not to provide record access	When to consider not providing record access to a patient - YouTube	Video giving examples of which patients it might be appropriate to code as not appropriate to have access to their record online (video length 10 ½ minutes)
How to redact from online view	How to redact on TPP SystmOne - YouTube	Video by one of pilot sites showing how to redact from online view in SystmOne (video length 4 minutes)
Documenting consultations that will be viewable by patients	Conducting and documenting consultations that empower patients	Video giving advice on how to conduct and document a consultation once

	when they access their records - YouTube	patients have access to their records (video length 4 ½ minutes)
RCGP toolkit	GP online services toolkit: Introduction (rcgp.org.uk)	Toolkit provided by RCGP to help practices provide GP online services effectively, efficiently, safely and securely
Learning from early adopter sites	Learning from early adopter sites - NHS Digital	Key learnings, lessons and benefits of full records access identified by pilot/early adopter sites. Includes concerns and mitigations, workload effects and approaches to excluding people who should not have access due to risk of serious harm to themselves or others
Abbreviations information for patients	Abbreviations commonly found in medical records - NHS App help and support - NHS (www.nhs.uk)	Link to nhs.uk website that lists the commonly used abbreviations found in medical records, this link is available to patients via the NHS App
IG Guidance	Access to patient records through the NHS App - NHS Transformation Directorate (england.nhs.uk)	Guidance for Patients, Practices and IG Professionals from an Information Governance/Data Protection perspective
Frequently Asked Questions - National	Access to patient records: Responses to commonly asked questions - NHS Digital	Answers to frequently asked questions from the national perspective
Frequently Asked Questions - Local	Currently being updated	
Amending patient records	Amending patient and service user records - NHS Transformation Directorate (england.nhs.uk)	Guidance for patients, practices and IG professionals on when information may or may not be amended. This includes information for practices on what to do if a patient disagrees with a diagnosis, information that was correct at the time of entry but has changed since, initial working diagnosis later ruled out
Digital Resources	NHS England » Digital materials	Various digital resources for practices to use, including web banner, content for waiting room screens, icons for twitter, digital infographics for social media
Patient Information guides	NHS England » Patient information guides	Multiple resources (colour, black & white and Easy Read) available for practices to provide to patients either to download or

			ordered for free	
	Template DPIA	Template Data Protection Impact Assessment	Template DPIA compiled by NHSE, requires local completion and sign off by DPO and Caldicott Guardian/Senior Partner – further guidance will be issued by MSE IG Team on how to complete	
	Process for adding code to patients who may not be given access to online record	Link	Process provided by Bath and North East Somerset, Swindon and Wiltshire on how to identify patients who may lack capacity to have access to their records and how to add the code	



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