

# Sharing Patient Records in SystemOne

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## Setting Consent to Share

Recently Lincolnshire Community Health Care Services are finding that they are unable to set up sharing preferences on patient records to view GP Practice patient information and this is having an impact on patient care.

The following guide has been set up to support practices should they encounter any issues with sharing, it shows how to check and set up your configuration. The process on how to share patient records is currently a local decision and as such practices will have their own method in place.

**Note:** If your practice is not experiencing any issues there is no necessity to change your current process/configuration.

There are two steps required to successfully enable sharing for patients the process is dependent on the local policy set out in each practice:


- Adding the patients consent - **Share In/Share Out**
- Configuring **Share In Rules**

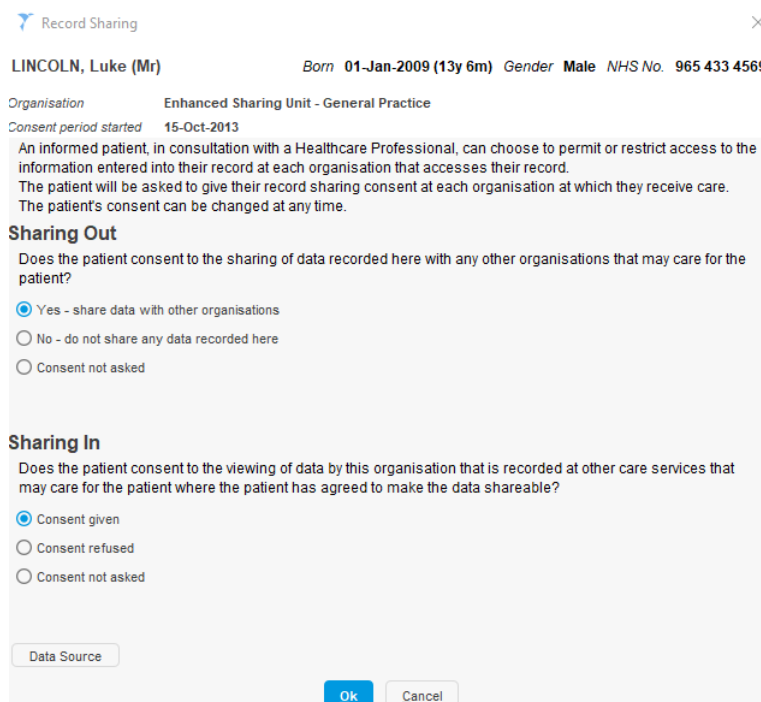
## Adding Patient Consent

This can be added at organisation or patient record level.

Most practices in Lincolnshire add the sharing consent to each individual patient record.

### Patient Record

This is done by retrieving the patient record going to the **Administrative Tree/Record Sharing/ Select the Icon**  **and set relevant consent patient requires/Select OK:**



**Record Sharing** [Close]

**LINCOLN, Luke (Mr)** Born 01-Jan-2009 (13y 6m) Gender Male NHS No. 965 433 4569

Organisation Enhanced Sharing Unit - General Practice  
Consent period started 15-Oct-2013

An informed patient, in consultation with a Healthcare Professional, can choose to permit or restrict access to the information entered into their record at each organisation that accesses their record.  
The patient will be asked to give their record sharing consent at each organisation at which they receive care.  
The patient's consent can be changed at any time.

**Sharing Out**  
Does the patient consent to the sharing of data recorded here with any other organisations that may care for the patient?

Yes - share data with other organisations  
 No - do not share any data recorded here  
 Consent not asked

**Sharing In**  
Does the patient consent to the viewing of data by this organisation that is recorded at other care services that may care for the patient where the patient has agreed to make the data shareable?

Consent given  
 Consent refused  
 Consent not asked

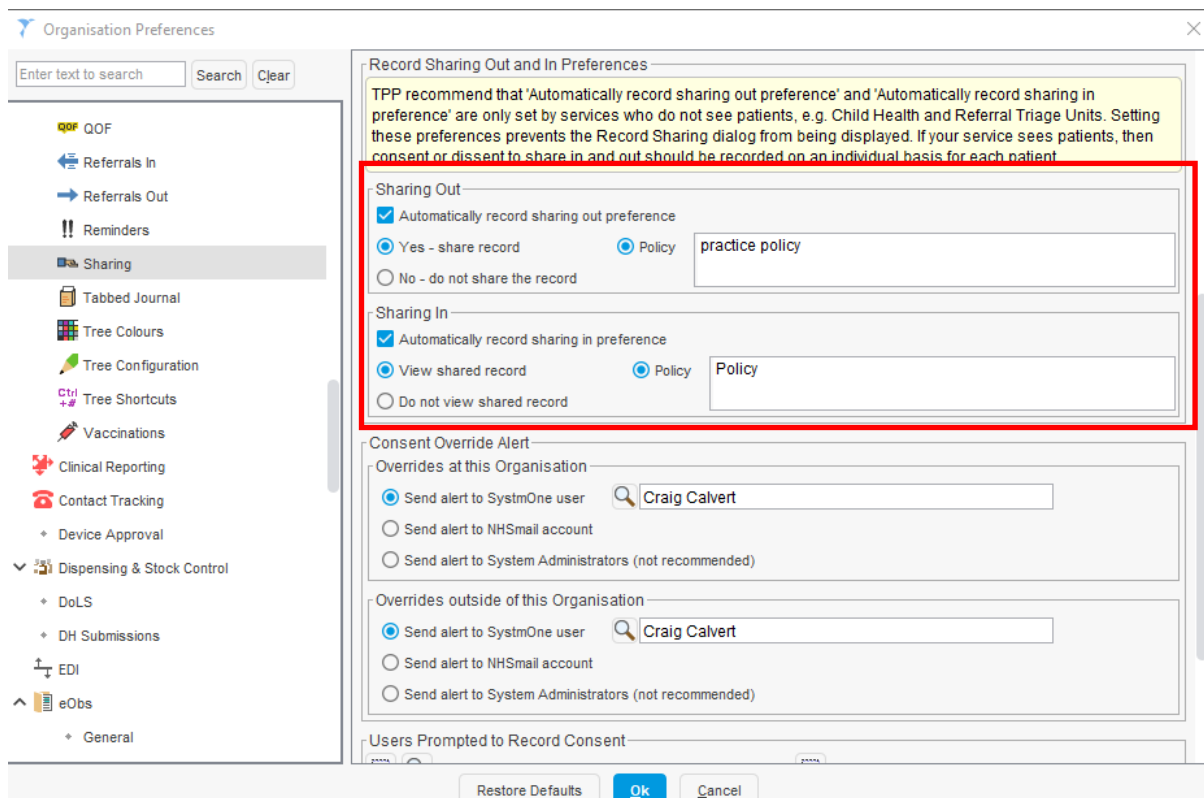
Data Source

**Ok** **Cancel**

## Organisational Share Settings

If your practice is one of the few that have set your sharing preferences at organisation level and adopted an opt out policy for patients (You must have all relevant policies and risk assessments in place for this) you can check these settings in **Organisation Preferences/Clinical Policy/ Record Sharing/Share Out/Share In**:

**\*\*Note** It is usual for most practices to have an organisation Share In but **not** Share Out this configuration ensures that information shared from other services such as community is visible in the GP patient record, but nothing is shared out without the patient consent.



Organisation Preferences

Enter text to search Search Clear

- QOF QOF
- Referrals In
- Referrals Out
- Reminders
- Sharing
- Tabbed Journal
- Tree Colours
- Tree Configuration
- Tree Shortcuts
- Vaccinations
- Clinical Reporting
- Contact Tracking
- Device Approval
- Dispensing & Stock Control
  - DoLS
  - DH Submissions
- EDI
- eObs
  - General

Record Sharing Out and In Preferences

TPP recommend that 'Automatically record sharing out preference' and 'Automatically record sharing in preference' are only set by services who do not see patients, e.g. Child Health and Referral Triage Units. Setting these preferences prevents the Record Sharing dialog from being displayed. If your service sees patients, then consent or dissent to share in and out should be recorded on an individual basis for each patient

Sharing Out

Automatically record sharing out preference

Yes - share record  No - do not share the record

Policy  Policy practice policy

Sharing In

Automatically record sharing in preference

View shared record  Do not view shared record

Policy  Policy

Consent Override Alert

Overrides at this Organisation

Send alert to SystemOne user  Send alert to NHSmail account  Send alert to System Administrators (not recommended)

Overrides outside of this Organisation

Send alert to SystemOne user  Send alert to NHSmail account  Send alert to System Administrators (not recommended)

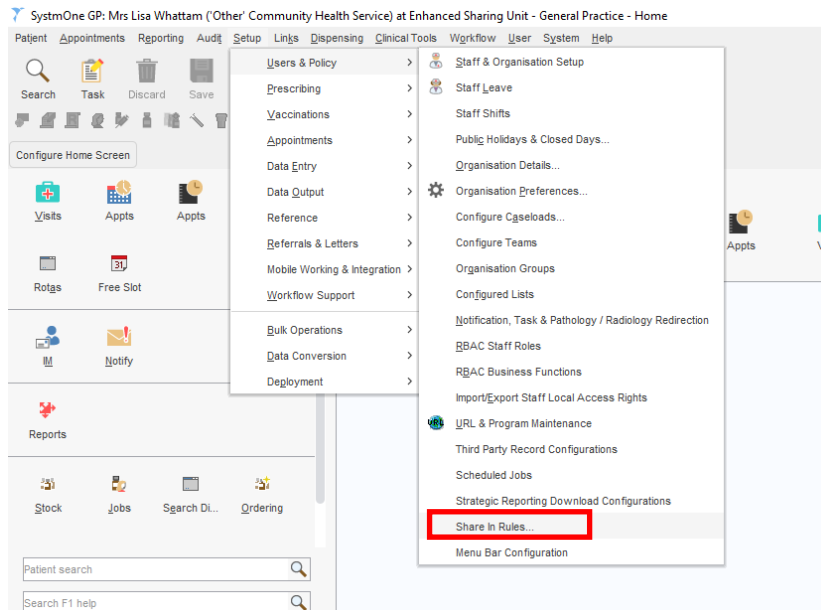
Users Prompted to Record Consent

Restore Defaults Ok Cancel

## Share In Rules

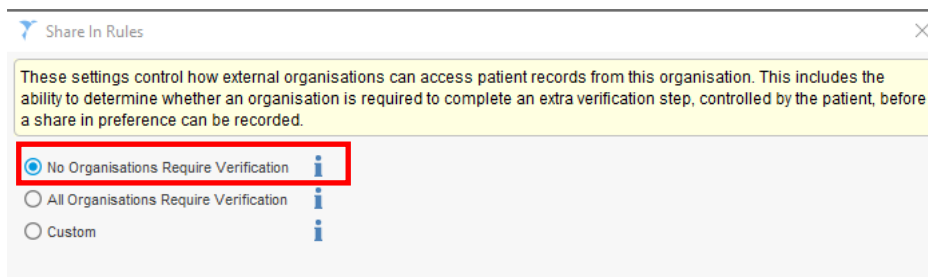
### Share in Rules - Organisational Settings

If you have share in rules set organisationally you can check your configuration in **Set Up/Users and Policy/Share In Rules**



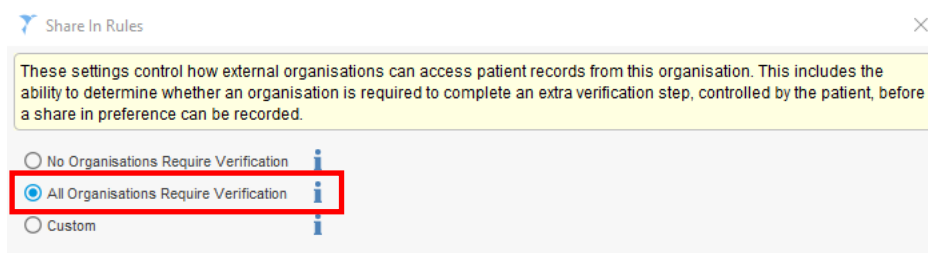
### No Organisations Require Verification

This means that when the share in/out preference is set on the patient no notifications or requests for verifications are sent to the patient.



### All Organisations Require Verification

Every time a share consent is added a verification is required and sent to the patient.

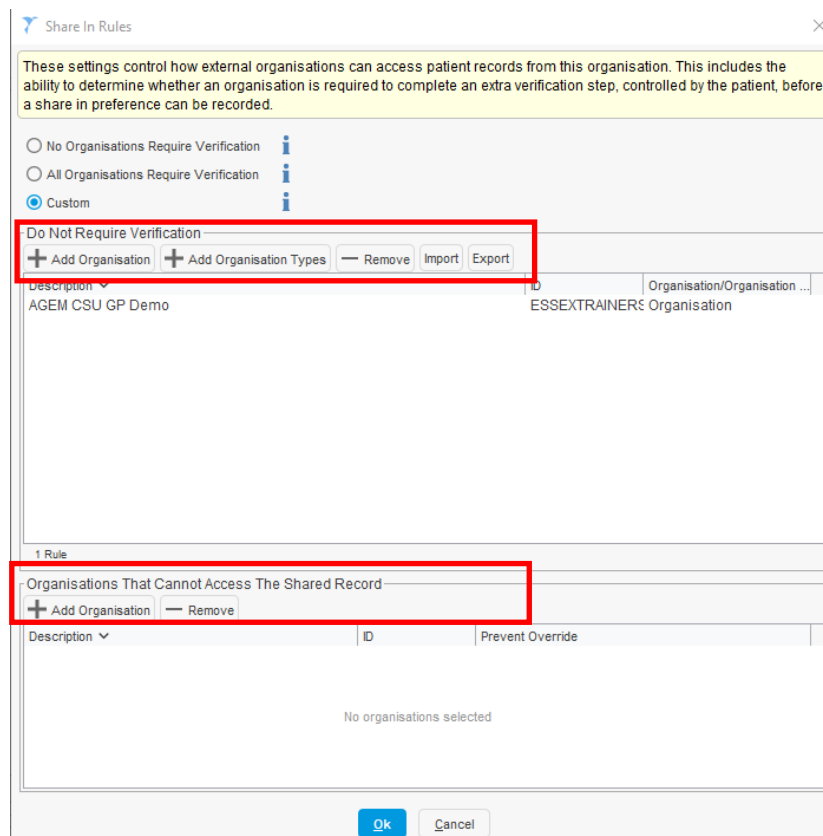


## Custom – Do Not Require Verification

Setting up a custom list of trusted organisations enables the record to be shared once consent has been recorded with specific organisations without the need for a verification to be sent to the patient. ([See Appendix 1 for a list of LCHS Units](#))

## Custom – Organisations That Cannot Access the Shared Record

Any organisations added in this section will not be allowed to access the shared patient information.



The screenshot shows the 'Share In Rules' dialog box with the following elements:

- Share In Rules** (Title bar)
- Information:** These settings control how external organisations can access patient records from this organisation. This includes the ability to determine whether an organisation is required to complete an extra verification step, controlled by the patient, before a share in preference can be recorded.
- Options:**
  - No Organisations Require Verification
  - All Organisations Require Verification
  - Custom
- Do Not Require Verification:**
  - + Add Organisation
  - + Add Organisation Types
  - Remove
  - Import
  - Export

Description	ID	Organisation/Organisation ...
AGEM CSU GP Demo		ESSEXTRAINER5 Organisation
- 1 Rule**
- Organisations That Cannot Access The Shared Record:**
  - + Add Organisation
  - Remove

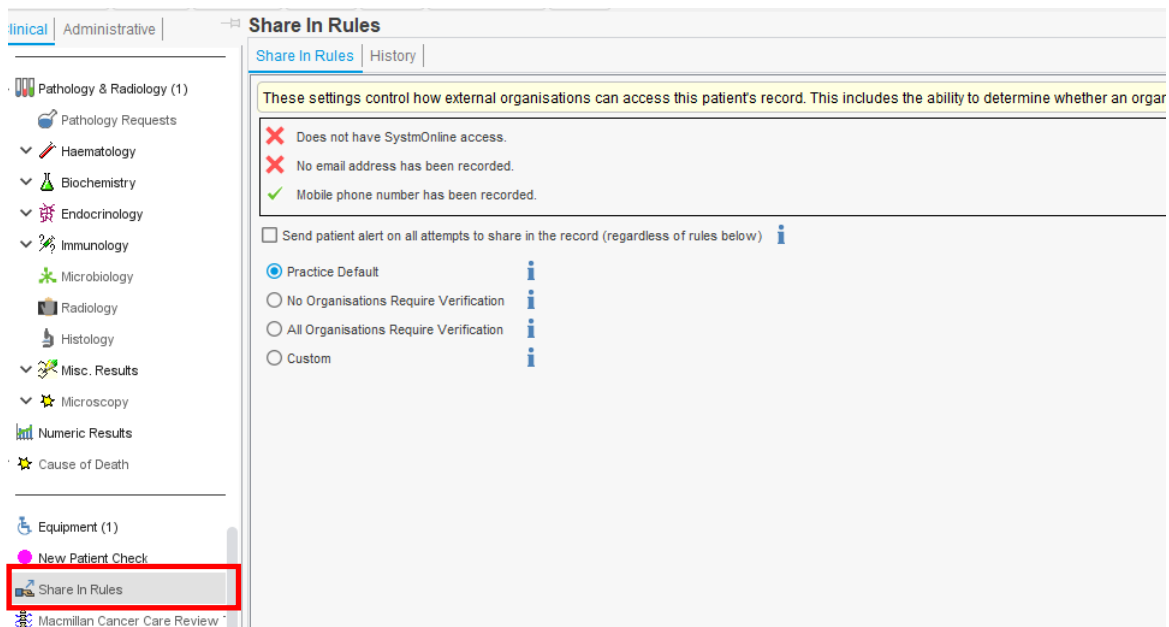
Description	ID	Prevent Override
No organisations selected		
- Buttons:** Ok, Cancel

## Share In Rules – Patient Record

You may have decided that the Share In rules are added on an individual patient need rather than organisationally and configure this within the patient record not at organisational level.

If this is the case when adding the sharing consent, you will also need to add the relevant organisation that is requesting to view the patient notes to the **share in rules** within the record and create a custom list for the individual patient.

**Note:** The Share In Rules node would need to be configured in the clinical tree to do this and this would have to be added by a System Administrator.



The screenshot shows the 'Share In Rules' configuration page. On the left, a navigation tree includes categories like 'Pathology & Radiology (1)', 'Haematology', 'Biochemistry', 'Endocrinology', 'Immunology', 'Microbiology', 'Radiology', 'Histology', 'Misc. Results', 'Microscopy', 'Numeric Results', 'Cause of Death', 'Equipment (1)', 'New Patient Check', and 'Share In Rules' (highlighted with a red box). The main content area is titled 'Share In Rules' and contains the following information:

- Header: Share In Rules | History
- Text: These settings control how external organisations can access this patient's record. This includes the ability to determine whether an organ...
- Status Summary:
  - ✗ Does not have SystemOnline access.
  - ✗ No email address has been recorded.
  - ✓ Mobile phone number has been recorded.
- Send patient alert on all attempts to share in the record (regardless of rules below)  *i*
- Practice Default  *i*
- No Organisations Require Verification  *i*
- All Organisations Require Verification  *i*
- Custom  *i*

## Contact Us

If you have any questions or require support with the configuration in SystmOne you can contact the training team at [agcsu.gpsystemstraining@nhs.net](mailto:agcsu.gpsystemstraining@nhs.net)

## Appendix 1 – LCHS SystmOne Units

This list contains details of all the LCHS Units that you may be requested to share records with and would need to be added to a custom list.

<b>Name of SystmOne Unit</b>	<b>Organisation Code</b>
Lincs Community nursing	560962654100
NE Adult Integrated	560962140108
NW Adult Integrated	560962194103
SE Adult Integrated	560962201102
SW Adult Integrated	560962215108
Lincolnshire Child Therapy	560962650106
Electronic Assistive Technology Service	560962549101
Lincs Podiatry Service	560962664102
Lincs TB Service	562740811102
Stroke Care Pathway	560962696100
Lincolnshire MSK Service	560962689101
Lincolnshire Community Paediatrics	560962694108
Lincolnshire CHS	560962652108
Adult Speech and Language Therapy	560962825106
Integrated Adult Therapy	560962545107
Lincs Rapid response	355638944049
LCHS Referral Service	577013417109
JCH Gainsborough CoHo Blood Clinics	560962609104
Community Hospitals LCHS	579192641101
Butterfly Hospice	132250386563
Gainsborough Urgent Treatment Centre	560962614101
Louth Urgent Treatment Centre	560962621100
Spalding Urgent Treatment Centre	560962617104
Lincoln Urgent Treatment Centre	560962646109
Boston Urgent Treatment Centre	562167264104
Skegness Urgent Treatment Centre	560962644107
UC Home Visiting	560962835108
Lincs OOH Grantham	560962804101
Lincs OOH Stamford	560962822103
Clinical Assessment Unit	560962521109
Lincolnshire Diabetes	560962671101
Lincolnshire OOH Call Handling	560962801108
Lincolnshire CAS	560962416101