SARs User Guide for EMIS Web Users

NEW
Now send SARs directly to 3rd party.

'Process SARs and Medical Reports in minutes'

Version 4

Contents

Important Notice concerning Confidentiality Policies within EMIS Web.

Some GP Practices use Confidentiality Policies within EMIS Web - this is where certain aspects of the medical record can be ‘locked’, so that only PGs and/or Clinicians are able to view. Some non-clinical staff have the correct RBAC role on their smart card to be able to override these policies, with the relevant permission of the Practice.

If there is a Confidentiality Policy applied to a patient’s clinical record and you have the authority to override this, then please do this prior to processing the SAR. If you don’t have the authority within your practice, then please pass the SAR instruction to a clinician who will have the permission to override the confidentiality policy and then process the SAR.

*The RBAC code to allow the overriding of policies is B0070.

If a policy is overridden, a reason must be given. This creates an audit trail and sends a task notification to the configured users.

The authority to override a confidentiality policy is set within the practice and Practice Guidelines must be followed at all times.

Please check every SAR instruction as to whether the patient’s record is affected by the policy before processing the SAR instruction using eMR.

Our Support Team is here to help- weekdays 8.30-17.30

e: emr@medi2data.com

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Overview of Process

Upon receiving a SAR

1. Login to eMR and locate the correct patient.

2. Decide how you wish to send the report: to: Patient, 3rd party or both. You now have option to upload consent form.

3. Create your first draft report redacting out sensitive and 3rd party information.

4. Select which attachments you wish to include or exclude.

5. Review and approve final record and attachment contents.

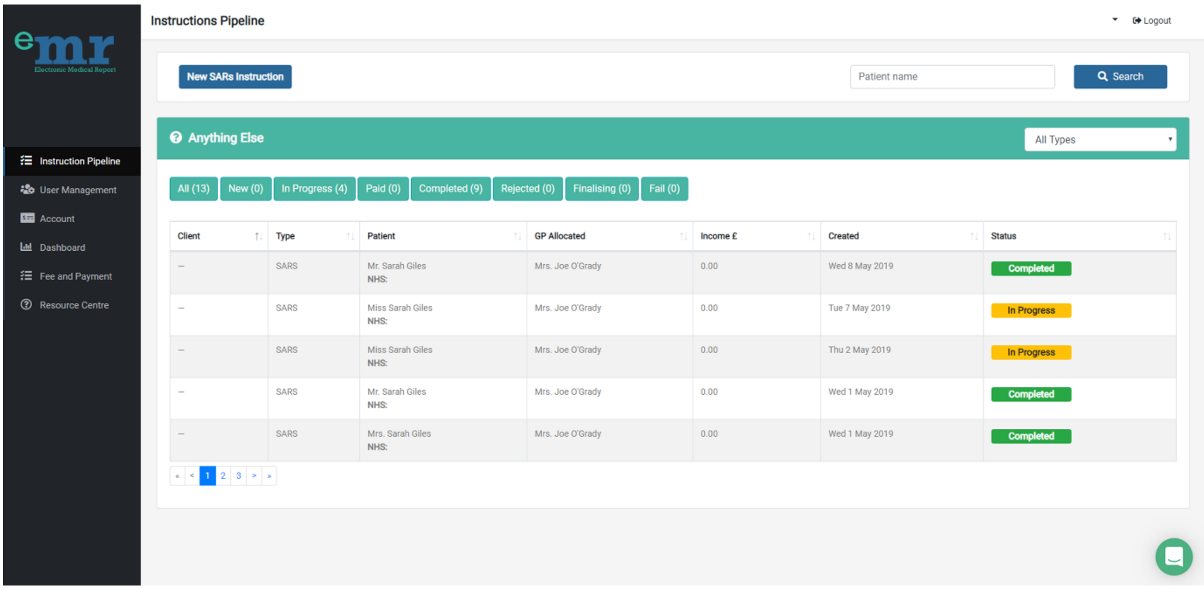
6. Send completed SAR to the Patient and or 3rd party with secure 2 factor authentication process.

1. Login to eMR and locate the correct patient.

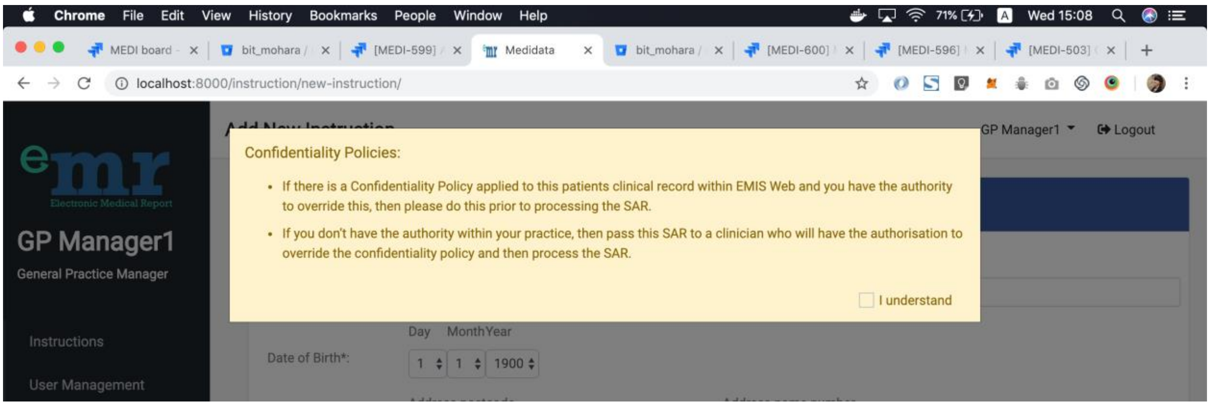
To Process a SAR (Subject Access Request) log in to eMR with your username and password

https://emr.medi2data.com/accounts/login

Press '**New SAR Instruction**'



You will then reach the 'Instruction Pipeline' screen and see an important message re Confidentiality policies.



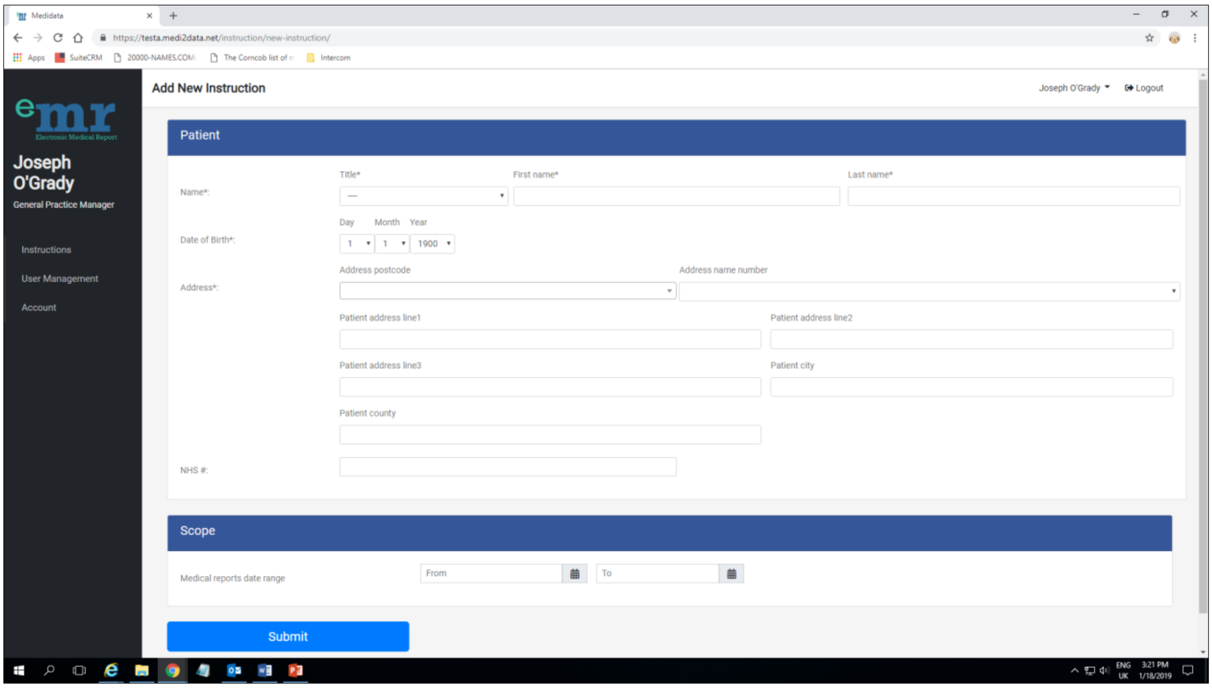
Please refer to confidentiality policies notice on page 3 and tick the box within the message to continue.

To locate the correct Patient on your system

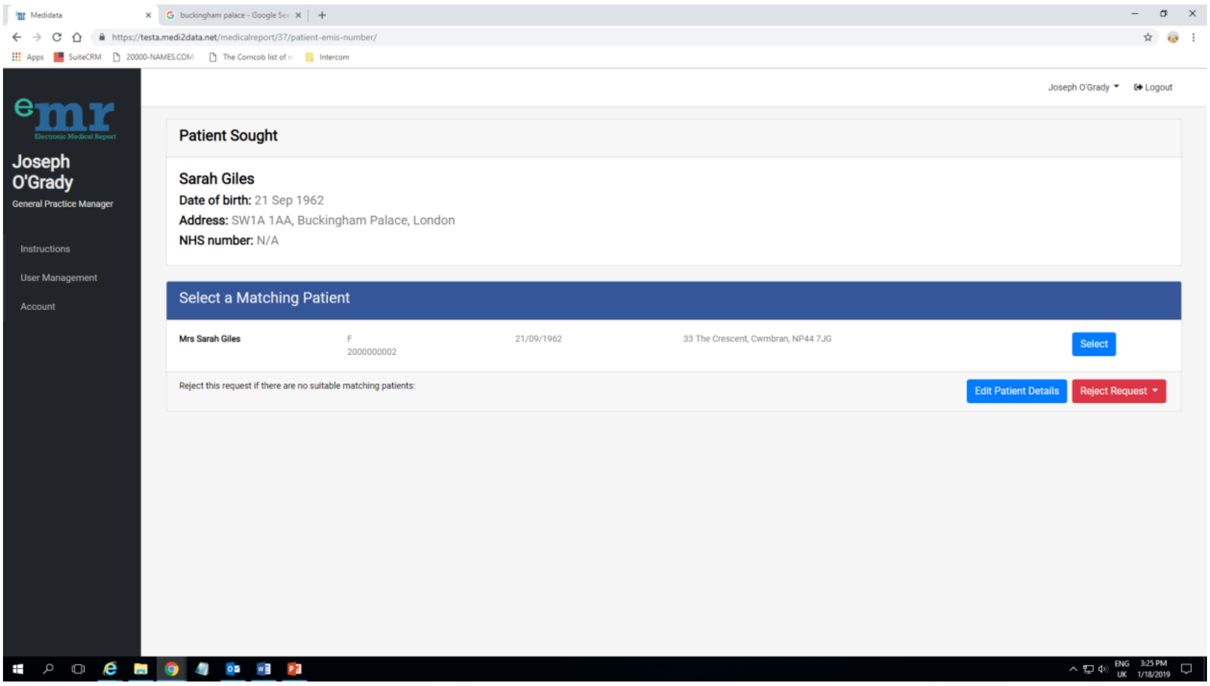
Enter Patient details- all asterisked fields are compulsory.

Enter 'scope' i.e. date range if appropriate.

Press 'Submit'

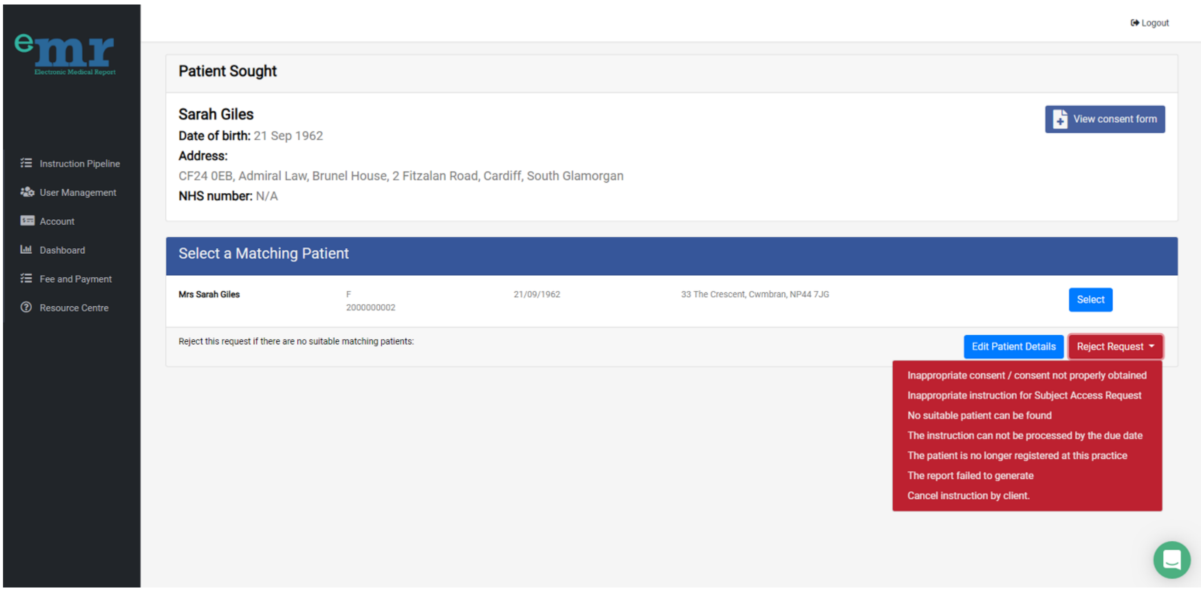


The next screen will show you any records that match the patient details. From the options presented- Click **'Select'** next to the matching Patient.



If you do not see the correct patient details, you can either

i) 'Edit Patient Details' – and re-enter the information. Or
ii) 'Reject Request' and select a reason for doing so from the drop down.



If you are happy with the patient selected- press 'Select' to begin processing the SAR.

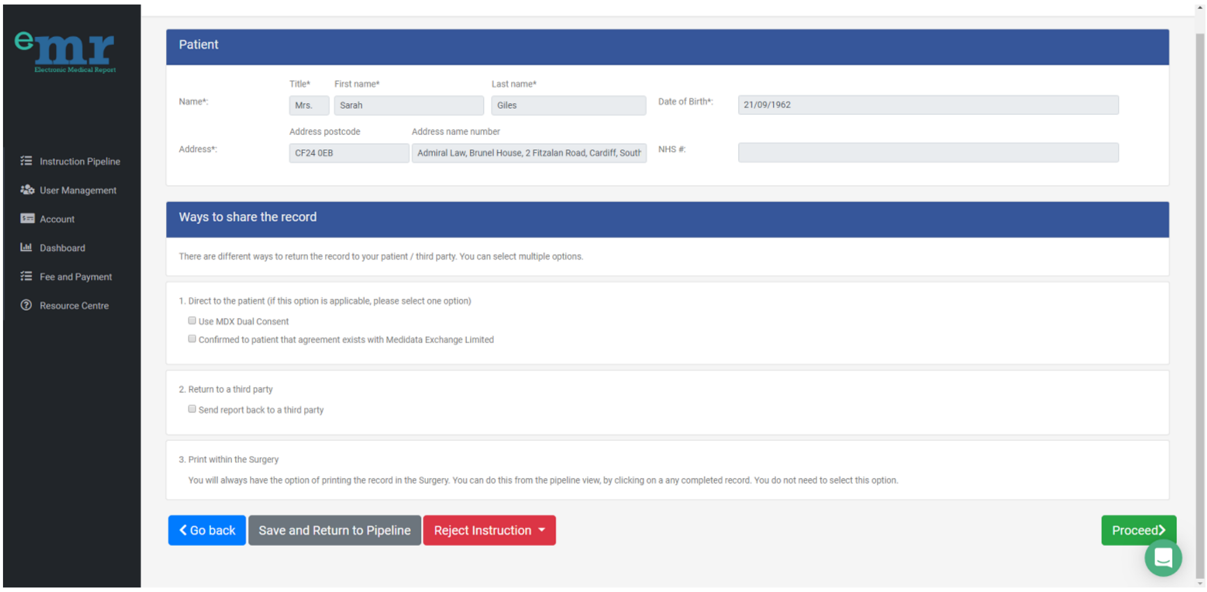
2. Decide on how you wish to send the report

After you select the Patient, you will arrive at the **'Ways to Share the Record'** screen.

Here you can choose to

i) Share with the patient
ii) Send directly to a Solicitor or other 3rd party who has requested it (with authorisation)
iii) Print the copy of the record
iv) Do a combination of these- by ticking more than one box.

This new improved SARs process gives you all the options you could possibly need- as requested by our users.



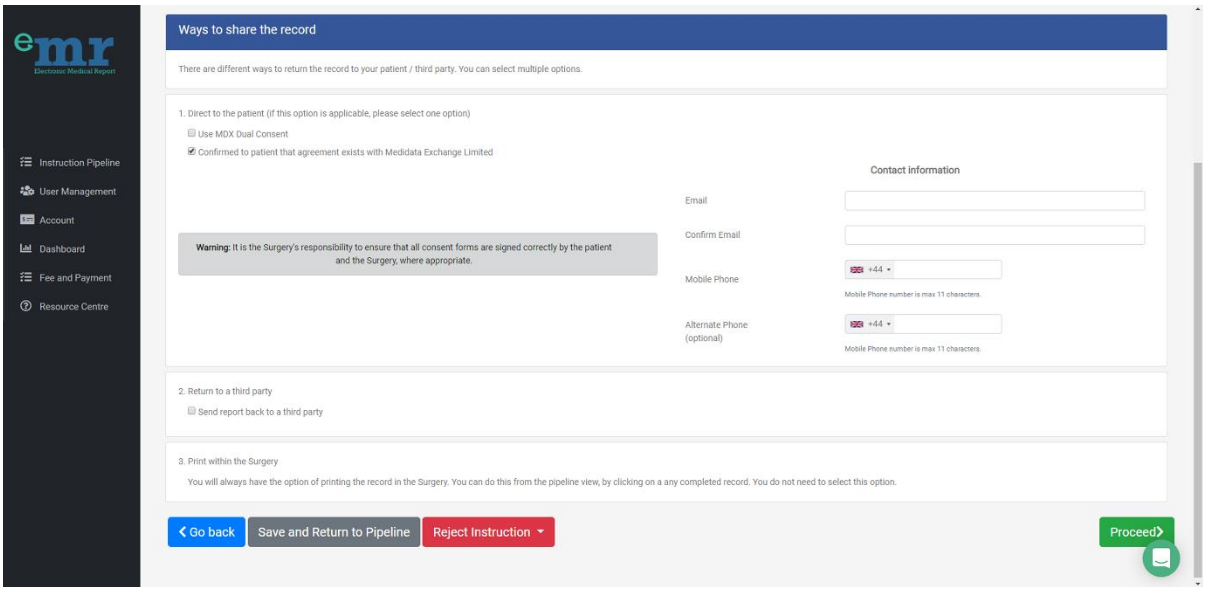
i) Send directly to the patient

Simply enter in the Patient email and mobile phone number.

These details are essential and will allow us to provide the patient with secure online access to their medical record.

We use a dual factor authentication process. The first stage is sending the patient an email with a secure link to the MediData patient portal. The second stage is sending a text message containing a single-use code to the mobile number.

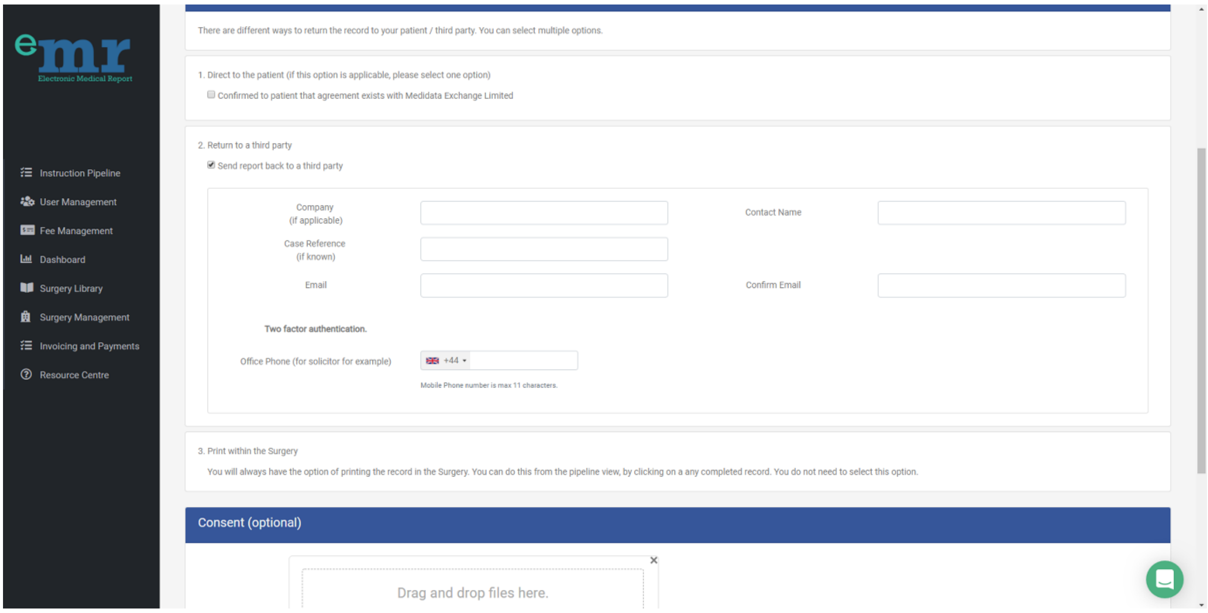
You are not required to upload the consent form, but you must take responsibility for ensuring that appropriate consent is in place before proceeding.



ii) Send to a Third Party

Simply enter in their email address and mobile phone number.

The report will be made available to them using secure online access as before.

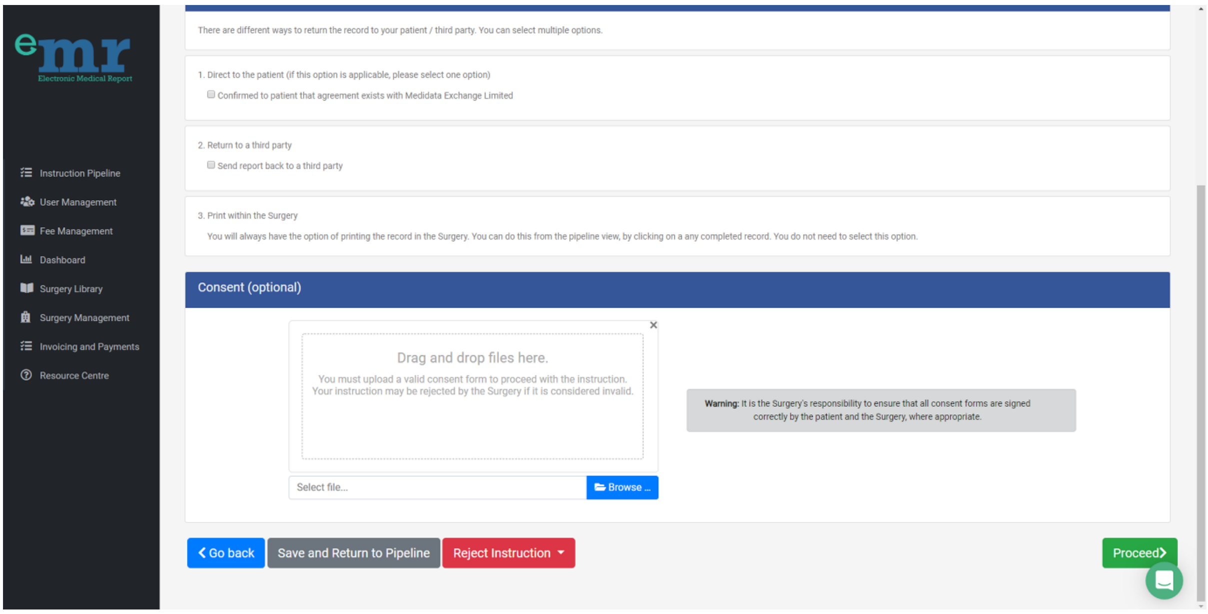


iii) Printing and downloading the report

This option is available to you from the pipeline view by clicking back into the completed report.
eMR has been designed to reduce costs and save time by delivering reports electronically- but this feature is there should you wish to use it.

Consent Forms

Uploading the patient consent form is optional. However, you must take responsibility if you decide not to upload any consent before proceeding to create the report.



3. Create your first draft report

Simply press **'Proceed'** to move forward with the report.

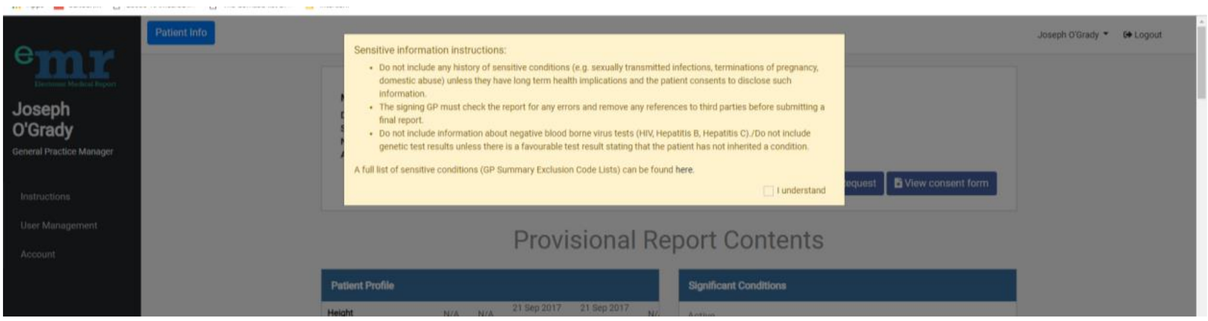
You can also

i. 'Save' what you have done so far and come back to this later.
ii. You can 'Reject Instruction' (again you would have to give reasons for doing so)

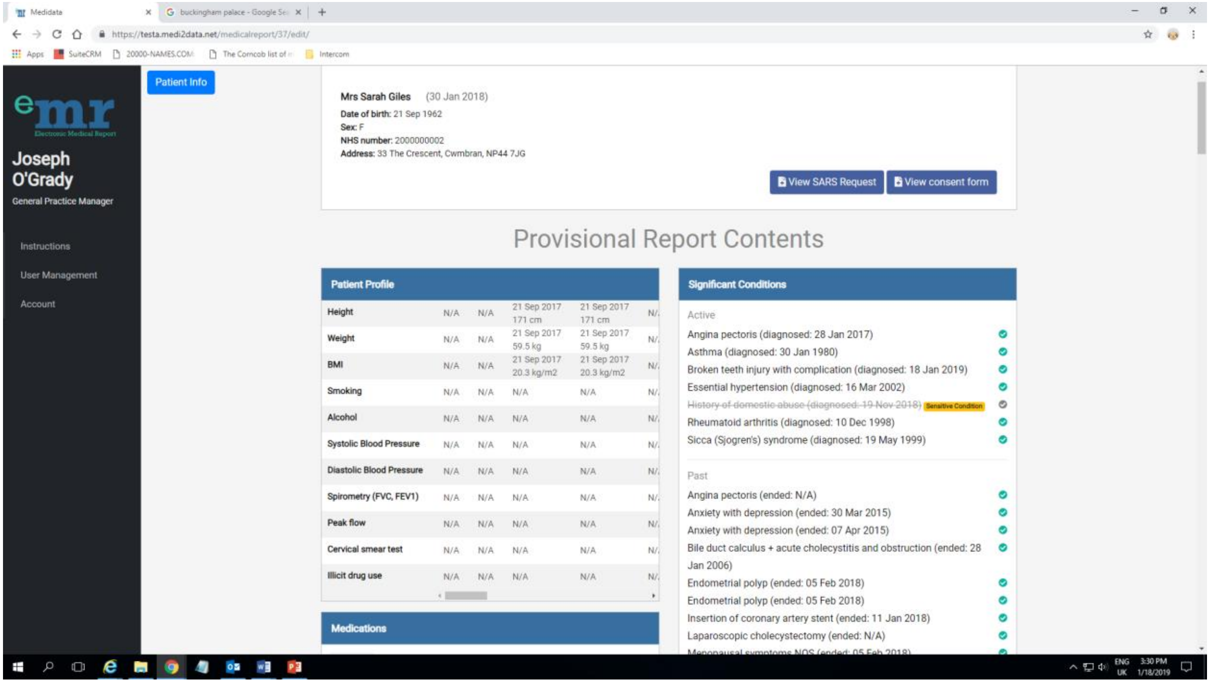
If you 'Save and Return to Pipeline' you will see this SAR instruction 'In Progress'. eMR will be processing the report in the background and you will be notified when the report is ready.

If you choose to 'Proceed' eMR will begin the autoredaction process on the record to produce a draft copy of the record.

Before viewing you will see a pop up. This box tells you that you need to accept responsibility for checking for 3rd parties and other sensitive information. You can access a full list of sensitive conditions through here as supplied from NHS digital TRUD. Please tick the box to accept to continue.



The next screen will be the **Provisional Patient Record.**



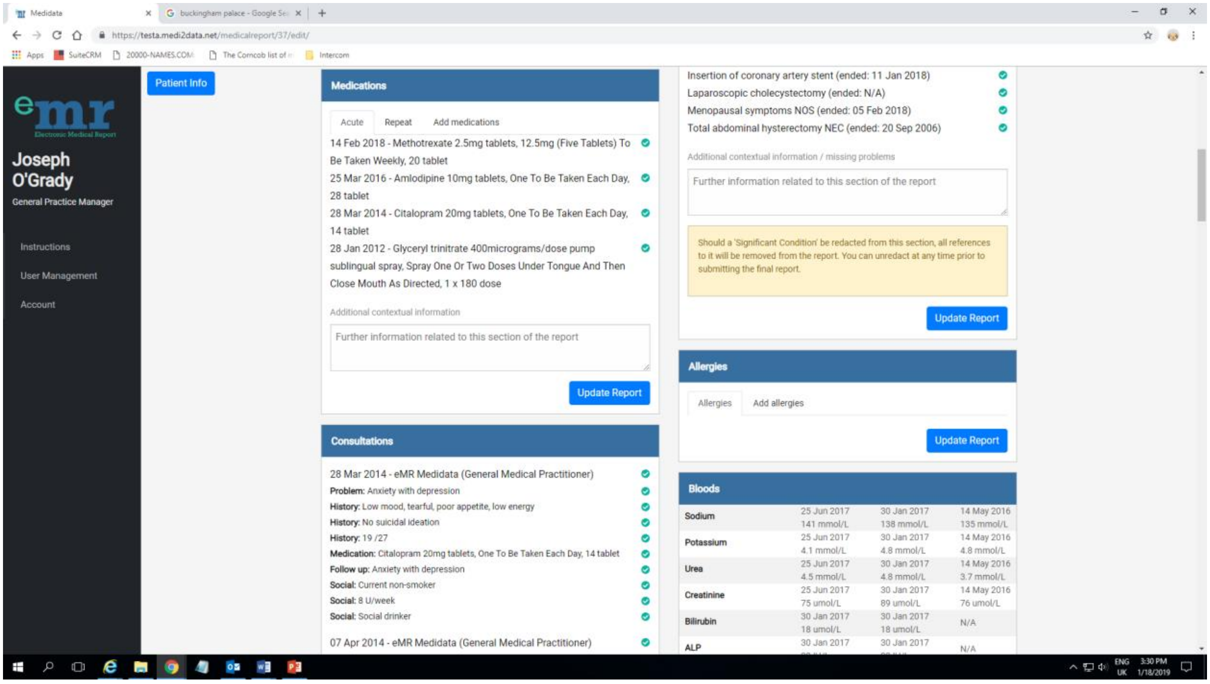
Review the record with the auto-redactions this may also require further manual redactions.

'Sensitive conditions' within the record, which eMR proposes to redact, are shown as being crossed out. Any 3rd party references found are redacted and replaced with 'UNSPECIFIED'.

To include or add information back into the final copy, simply click the greyed-out tick to the right of the entry.

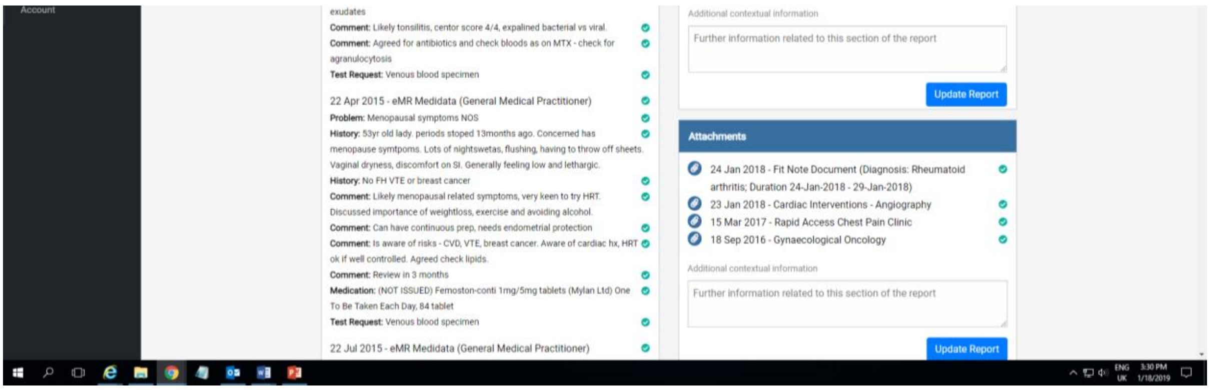
To exclude or redact information, simply click the green tick to the right of the entry.

To save your changes click 'Update record' at the end of each section and/or at the end of the Provisional Record Contents by scrolling down.



4. Select which attachments you wish to include or exclude.

You can **add or remove attachments** using the same method as described above. To view the attachments simply click on the paperclip icon to left of each named attachment.

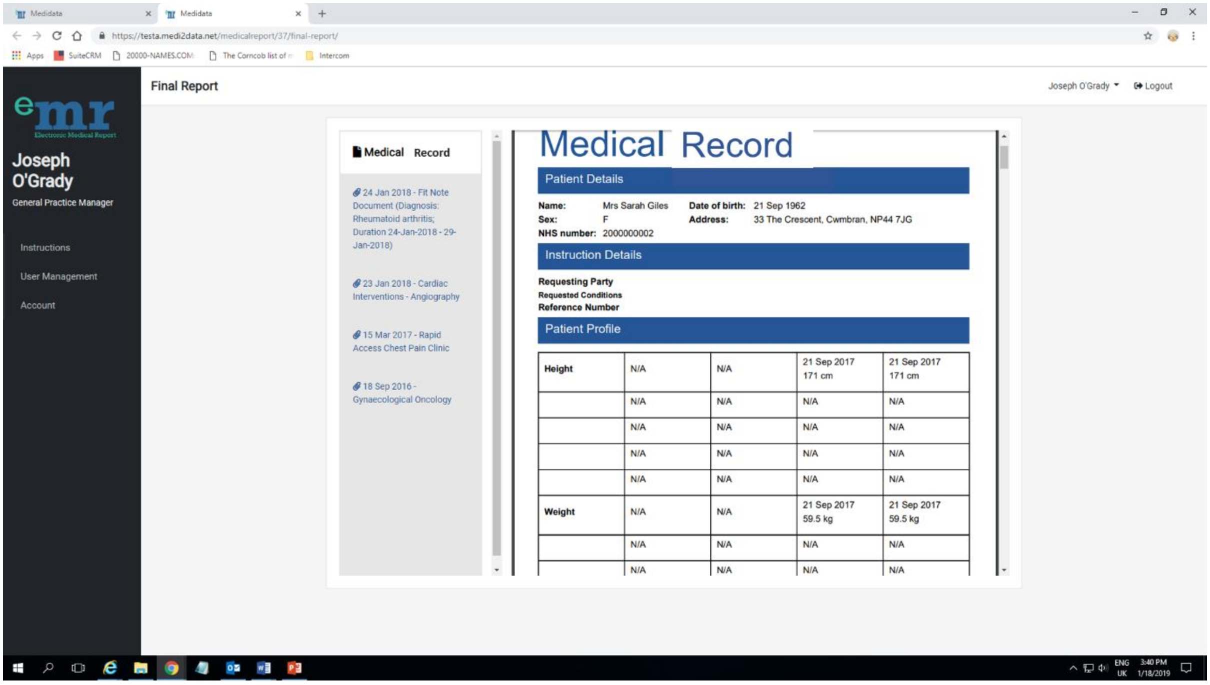


Towards the end of the record you will also see 2 free text fields where you can add additional comments. Press **'Update'** to save any changes.

5. Review and approve final record and attachments

To review the final record press 'Preview and Submit'

You will see this screen.



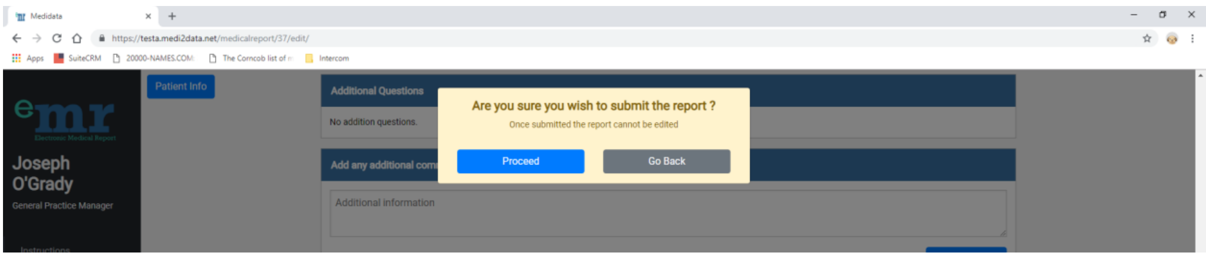
Once viewed, you can either **'Edit' or 'Submit'**

If you choose 'Save Draft' a copy will go the pipeline and marked 'In Progress'. You can finish this later.

6. Send the completed SAR

If you happy with the report sign off the report by selecting from the drop down box and press '**Submit'. Please remember to tick the box accepting responsibility for the report.**

You will then have one final option to 'Proceed' or 'Go Back'



When you press ‘Proceed’ the SAR instruction has now been completed.

A notation, informing that SAR was completed, is pushed back to the clinical system’s patient record. This is date and time stamped.

What happens next?

The SAR will be sent to your Patient and or the 3rd party depending on your selection.

They will both receive an email notifying them how to access the SAR securely online. We use a secure 2-factor authentication system which involves an email and a code to their phone. They can then view, download or print the record.

If you chose just to send to the patient, they will be able to authorise a 3rd party of their choice to access their record. You can find copies of the emails in Appendix 1. Please note the Patient and Solicitor will also be asked to accept our Terms and Conditions as part of our compliance process.

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Appendix 1

Patient notification

Please see below the email that is generated to the patient following completion of the SAR.

Subject: Notification from your GP surgery

Your authorised Subject to Access Request has been processed by your GP surgery, [insert name of surgery], and a copy of your medical record has been produced.

*Please ensure you have your **mobile phone** at hand. You will receive a text with a **code number** required to access your medical record. Please follow the instructions on screen.*

*If you want to send the information to a third party, such as your **Solicitor,** you will also need to authorise their access to your medical information by following the details provided.*

Access your log-in page, via this link. [insert link]

Should you require assistance, please email us at notifyus@medi2data.com

Medidata Support Team www.medi2data.com

Solicitor Notification

Subject: Completed SAR Request

The Subject to Access Request has now been processed.

Ref Number :
You are authorised to access this medical record via a secure on-line portal, provided by MediData Exchange, using the link below.
Please note you will have access for 30 days only.
However, this can be extended by the Patient.

For security purposes, you will receive an access code delivered to the telephone number given by the Patient, ending in xxx
Please follow the link and the on-screen instruction. [insert link]

Should you require assistance, please email MediData Exchange at notifyus@medi2data.com