



SARs User Guide for EMIS Web Users

***‘Process SARs and Medical Reports
in minutes’***

Version 3

Contents

Surgery Confidentiality Policy	3
Overview of Process	4
Patient Consent	8
Redaction	11
Previewing Record	13
Patient notification	15

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 in EMIS Web 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.

eMR: support and training completely free to your surgery

Our support team are available from 8.30-17.30 weekdays.

email: emr@medi2data.com

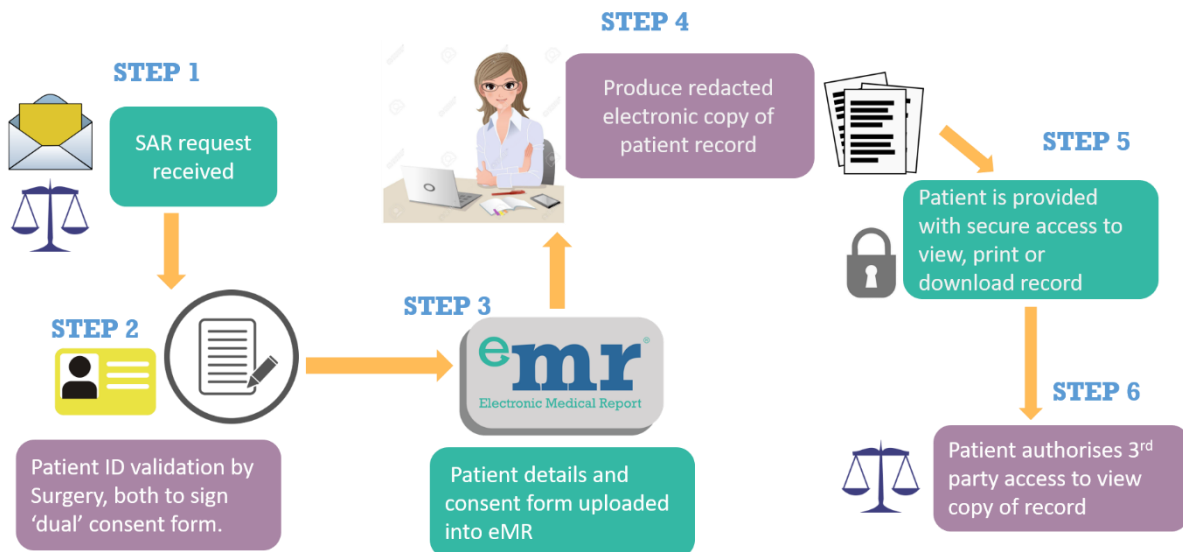
Tel: 03333 055 774 (local call rates apply)

For a call back [click here](#) to book into our calendar

www.medi2data.com

Overview of Process


Processing a Subject Access Request with eMR



1. GP surgery **receives** a Subject Access Request (SAR).
2. **GDPR Patient ID validation process and the signing of the 'dual consent' form** involves the patient visiting the GP surgery with 2 forms of ID.
3. Surgery inputs patient details into eMR and uploads the 'dual' consent form, containing email and mobile phone details, which allows Medidata to provide the Patient with secure access to their medical record.
4. **eMR produces a copy of the Patient record in seconds**, redacting out sensitive and 3rd party information. Once this is complete and the surgery selects 'Submit', a notification email is sent to the Patient with clear instructions in how to access the record using a secure 2 factor authentication.
5. **Patient**, when securely in the portal, may **authorise a 3rd Party** (Solicitor) to be provided with access details in order to view their record.
6. **Third party gains access** to the Patient's record using 2 factor authentication. The 3rd party is restricted to 30-day access (GDPR) and this can be extended by the Patient.
7. A **notation**, informing that a SAR was completed, is pushed back to the **clinical system's patient record**. This is date and time stamped.

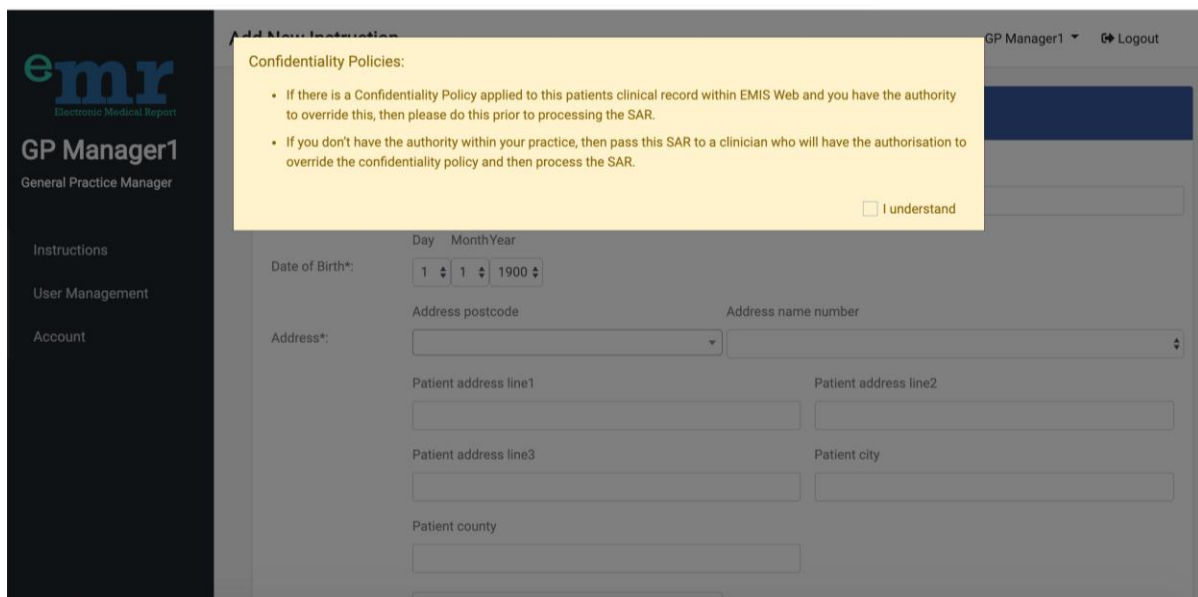
To Process a SAR.

1. Login to eMR with your email and password



The screenshot shows a web browser window with the URL <https://beta.medidata.net/accounts/login/>. The page features the eMR logo (Electronic Medical Report) and a sign-in form. The form includes fields for 'Email' and 'Password', a 'Forgot your password?' link, and a blue 'LOGIN' button. Below the button are links for 'Terms & Conditions' and 'Data Policy', and a copyright notice '© 2019'.

You will then reach the 'Instruction Pipeline' screen and this important message regarding Confidentiality Policies.



The screenshot shows the 'Add New Instruction' screen in the eMR system. A yellow warning box titled 'Confidentiality Policies:' is overlaid on the form. The warning contains two bullet points: 'If there is a Confidentiality Policy applied to this patients clinical record within EMIS Web and you have the authority to override this, then please do this prior to processing the SAR.' and 'If you don't have the authority within your practice, then pass this SAR to a clinician who will have the authorisation to override the confidentiality policy and then process the SAR.' Below the text is a checkbox labeled 'I understand'. The background form includes fields for 'Date of Birth*', 'Address*', 'Patient address line1', 'Patient address line2', 'Patient address line3', 'Patient city', and 'Patient county'. The left sidebar shows the 'GP Manager1' logo and navigation links for 'Instructions', 'User Management', and 'Account'. The top right corner shows 'GP Manager1' and a 'Logout' button.

PLEASE REFER TO CONFIDENTIALITY POLICIES NOTICE ON PAGE 3 AND TICK THE BOX WITHIN THE MESSAGE TO CONTINUE.

To proceed: Press '**New SAR Instruction**'

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 screenshot shows a web browser window with the URL <https://testa.medidata.net/instruction/new-instruction/>. The page title is 'Add New Instruction'. The user is logged in as 'Joseph O'Grady' with a 'Logout' link. The form is titled 'Add New Instruction' and is divided into two main sections: 'Patient' and 'Scope'. The 'Patient' section contains the following fields: 'Name*' (with sub-fields for Title*, First name*, and Last name*), 'Date of Birth*' (with sub-fields for Day, Month, and Year), 'Address*' (with sub-fields for Address postcode and Address name number), 'Patient address line1', 'Patient address line2', 'Patient address line3', 'Patient city', 'Patient county', and 'NHS #'. The 'Scope' section contains a 'Medical reports date range' field with 'From' and 'To' date pickers. A blue 'Submit' button is located at the bottom of the form. The left sidebar shows the user's name 'Joseph O'Grady' and the role 'General Practice Manager', along with navigation links for 'Instructions', 'User Management', and 'Account'. The top right corner shows the user's name 'Joseph O'Grady' and a 'Logout' link.

The next screen will show you any records that match the patient details. From the options presented- '**Select**' the correct or 'Matching Patient'.

emr
Electronic Medical Report

Joseph O'Grady
General Practice Manager

Instructions
User Management
Account

Joseph O'Grady Logout

Patient Sought

Sarah Giles
Date of birth: 21 Sep 1962
Address: SW1A 1AA, Buckingham Palace, London
NHS number: N/A

Select a Matching Patient

Name	Gender	Date of Birth	Address
Mrs Sarah Giles	F	21/09/1962	33 The Crescent, Cwmbran, NP44 7JG

Reject this request if there are no suitable matching patients:

[Select](#) [Edit Patient Details](#) [Reject Request](#)

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

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

When you select the correct Patient, you will arrive at the 'Patient consent' screen.

emr
Electronic Medical Report

Joseph O'Grady
General Practice Manager

Instructions
User Management
Account

Patient

Name*: Ms. Sarah Giles Date of Birth*: 1962-09-21
Address*: SW1A 1AA Buckingham Palace, London NHS #:

Patient consent(s) and contact information (mandatory)

SAR Patient Request

Uploading consent is required if initiated by third party (solicitor)

Warning: It is the Surgery's responsibility to ensure that all consent forms are signed correctly by the patient and the Surgery, where appropriate.

Drag & drop files here ...

Select file... [Browse...](#)

SAR dual consent

Once printed off and signed, scan document to a folder on your system, and upload the document to this screen by using the 'browse' button below.

Warning: It is the Surgery's responsibility to ensure that all consent forms are signed correctly by the patient and the Surgery, where appropriate.

Drag & drop files here ...

Select file... [Browse...](#)

Contact information

Email:

Confirm Email:

Mobile Phone:

Alternate Phone (optional):

In order for your patient to have secure access to a copy of their patient record, the above information fields need to be completed. Without this information, your patient will not be provided secure online access to a copy of their record, but you will be able to print out a hard copy to provide to your patient directly.

[Go back](#) [Proceed to Report](#) [Reject Instruction](#) [Save and Return to Pipeline](#)

This screen is divided into 3 columns. The first column allows you the option to upload the SAR from the Patient (this is optional to upload). The middle section is for

the **‘SAR Dual Consent’ form which is essential** and the final section is for the Patient contact information. This information is required for us to provide secure electronic access to the patient online once the SAR is completed.

i. SAR - Patient Consent - Optional

As mentioned above, you have the option to scan and upload the SAR form signed by your patient. If you do not upload this, you will receive a prompt reminding you- but it is not essential.

ii. SAR Dual Consent

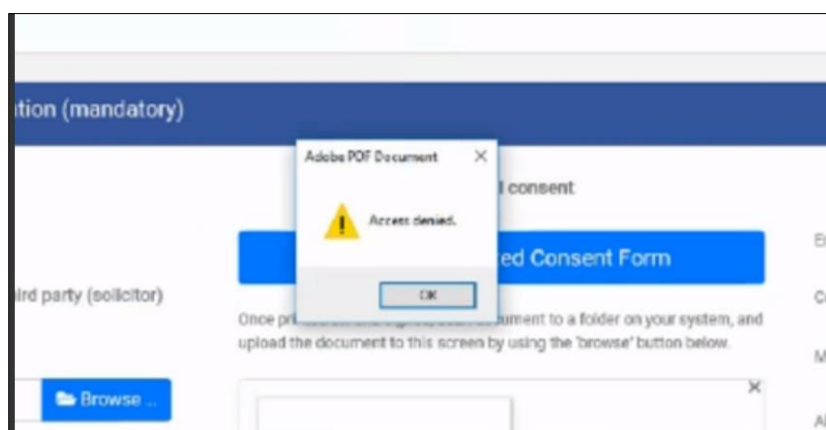
This consent form allows MediData to securely hold the patient’s medical information and provide them with secure online access to a copy of their medical record. We do this by requesting an email and mobile phone number within the form*.

eMR creates a prepopulated dual consent form with the patient details. Print this off and ask the patient to sign it when you invite them into the surgery to perform the ID validation process.

If you prefer, you can print off blank dual consent forms from the ‘Resource Centre’, in the left side menu, and manually fill in the details when the patient is with you.

Once the patient has signed the dual consent form, you are required to scan and upload this into eMR using the ‘Browse’ and ‘Upload’ buttons.

Please note: If you upload a pdf file, depending on which version of Adobe Acrobat Reader you have, you may experience an error message ‘Access denied’ as shown below. It is safe to proceed with your SAR, so please click ‘Ok’ to continue. This issue should resolve itself when you next upgrade your Adobe Acrobat Reader.



iii. Patient contact information

On the right hand-side you will see 'Patient Contact information'. These details are essential for us to provide the patient with secure on-line access to their medical record.

We use a dual factor authentication process. The first stage is sending the patient an email with a link to the MediData patient portal. The second stage involves sending a text message to their mobile phone, containing a one-time code number, which they use to access their record.

**Please note: Should your patient not be able to provide an email address and mobile phone number, a relative's details can be provided but ONLY with the express consent given by the relative.*

Medidata Exchange will not be held responsible for providing access to the patient's medical information to an individual, whose details have been disclosed by your patient.

If your patient would prefer to collect their record in person, you can save the record as a PDF and print it off for them.

You now have a choice:

- 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)
- iii. You can 'Proceed to a Record'

If you 'Save and Return to Pipeline' you will see this SAR instruction 'In Progress' as shown below.

Notice also the different options around the status of a SAR: New, In Progress, Completed, Rejected. 'Paid' refers to insurance report instructions which is addressed in a user guide relating to insurance (AMRA) instructions. You can filter by status by selecting from the menu.

The screenshot displays the 'Instructions Pipeline' interface. On the left is a sidebar with the 'emr' logo and user information for 'Joseph O'Grady, General Practice Manager'. The main area has a 'New SARS Instruction' button and a search bar. Below these are filters for 'All (2)', 'New (0)', 'In Progress (1)', 'Paid (0)', 'Completed (1)', and 'Rejected (0)'. A dropdown menu shows 'All Types'. The table below lists two SAR instructions for 'Ms. Sarah Giles NHS'.

	Client	Type	Patient	GP Allocated	Income £	Created	Status
1	—	SARS	Ms. Sarah Giles NHS	— Joseph O'Grady	0.00	Fri 18 Jan 2019	In Progress
2	—	SARS	Ms. Sarah Giles NHS	— Joseph O'Grady	0.00	Fri 18 Jan 2019	Completed

If you press 'Proceed to Record'

Patient

Name*: Title* First name* Last name* Date of Birth*: 1962-09-21

Address*: Address postcode Address name number NHS #:

SW1A 1AA Buckingham Palace, London

Patient consent(s) and contact information (mandatory)

SAR Patient Request

Uploading consent is required if initiated by third party (solicitor)

Drag & drop files here ...

Warning: It is the Surgery's responsibility to ensure that all consent forms are signed correctly by the patient and the Surgery, where appropriate.

Select file... Browse ...

SAR dual consent

Print Pre-Populated Consent Form

Once printed off and signed, scan document to a folder on your system, and upload the document to this screen by using the 'browse' button below.

Drag & drop files here ...

Warning: It is the Surgery's responsibility to ensure that all consent forms are signed correctly by the patient and the Surgery, where appropriate.

Select file... Browse ...

Contact information

Email

Confirm Email

Mobile Phone +44

Alternate Phone (optional) +44

In order for your patient to have secure access to a copy of their patient record, the above information fields need to be completed. Without this information, your patient will not be provided secure online access to a copy of their record, but you will be able to print out a hard copy to provide to your patient directly.

[Go back](#) [Proceed to Report](#) [Reject Instruction](#) [Save and Return to Pipeline](#)

A provisional copy of the patient record will be produced but with an important piece of information- which you need to accept before proceeding.

Patient Info

Sensitive information instructions:

- Do not include any history of sensitive conditions (e.g. sexually transmitted infections, terminations of pregnancy, domestic abuse) unless they have long term health implications and the patient consents to disclose such information.
- The signing GP must check the report for any errors and remove any references to third parties before submitting a final report.
- Do not include information about negative blood borne virus tests (HIV, Hepatitis B, Hepatitis C). Do not include genetic test results unless there is a favourable test result stating that the patient has not inherited a condition.

A full list of sensitive conditions (GP Summary Exclusion Code Lists) can be found here.

☐ I understand

Provisional Report Contents

Patient Profile					Significant Conditions	
Height	N/A	N/A	21 Sep 2017	21 Sep 2017	171 cm	N/A
Weight	N/A	N/A	21 Sep 2017	21 Sep 2017	59.5 kg	N/A
BMI	N/A	N/A	21 Sep 2017	21 Sep 2017	20.3 kg/m2	N/A
Smoking	N/A	N/A	N/A	N/A	N/A	N/A
Alcohol	N/A	N/A	N/A	N/A	N/A	N/A
Systolic Blood Pressure	N/A	N/A	N/A	N/A	N/A	N/A
Diastolic Blood Pressure	N/A	N/A	N/A	N/A	N/A	N/A
Spirometry (FVC, FEV1)	N/A	N/A	N/A	N/A	N/A	N/A
Peak flow	N/A	N/A	N/A	N/A	N/A	N/A
Cervical smear test	N/A	N/A	N/A	N/A	N/A	N/A
Illicit drug use	N/A	N/A	N/A	N/A	N/A	N/A
					Active Angina pectoris (diagnosed: 28 Jan 2017) ✓ Asthma (diagnosed: 30 Jan 1980) ✓ Broken teeth injury with complication (diagnosed: 18 Jan 2019) ✓ Essential hypertension (diagnosed: 16 Mar 2002) ✓ History of domestic abuse (diagnosed: 10 Nov 2018) Warning Condition ✓ Rheumatoid arthritis (diagnosed: 10 Dec 1998) ✓ Sicca (Sjogren's) syndrome (diagnosed: 19 May 1999) ✓ Past Angina pectoris (ended: N/A) ✓ Anxiety with depression (ended: 30 Mar 2015) ✓ Anxiety with depression (ended: 07 Apr 2015) ✓ Bile duct calculus + acute cholecystitis and obstruction (ended: 28 Jan 2006) ✓ Endometrial polyp (ended: 05 Feb 2018) ✓ Endometrial polyp (ended: 05 Feb 2018) ✓	

This box tells you that you need to accept responsibility for checking for 3rd parties and other sensitive information. eMR will assist using its auto-redaction process but it is your responsibility to ensure that all data included in the SAR is relevant and necessary. **Please tick the box to accept to continue.**

The next screen will be the **Provisional Patient Record** which may require further **manual redaction**.

On the screen below:

- i. You can view the Patient information in the top banner of the screen and view the SAR and dual consent forms
- ii. Elements of the record, which eMR proposes to redact, are shown as being crossed out. These elements are: sensitive conditions and 3rd party references.

The screenshot shows the eMR interface for a patient named Mrs Sarah Giles (30 Jan 1988). The top banner displays patient information: Date of birth: 21 Sep 1982, Sex: F, NHS number: 2000000002, Address: 33 The Crescent, Cwmbran, NP44 7JG. Below this are buttons for 'View SARS Request' and 'View consent form'.

The main section is titled 'Provisional Report Contents' and contains two tables:

Patient Profile					
Height	N/A	N/A	21 Sep 2017	21 Sep 2017	N/A
Weight	N/A	N/A	21 Sep 2017	21 Sep 2017	N/A
BMI	N/A	N/A	21 Sep 2017	21 Sep 2017	N/A
Smoking	N/A	N/A	N/A	N/A	N/A
Alcohol	N/A	N/A	N/A	N/A	N/A
Systolic Blood Pressure	N/A	N/A	N/A	N/A	N/A
Diastolic Blood Pressure	N/A	N/A	N/A	N/A	N/A
Spirometry (FVC, FEV1)	N/A	N/A	N/A	N/A	N/A
Peak flow	N/A	N/A	N/A	N/A	N/A
Cervical smear test	N/A	N/A	N/A	N/A	N/A
Illicit drug use	N/A	N/A	N/A	N/A	N/A

Significant Conditions	
Active	
Angina pectoris (diagnosed: 28 Jan 2017)	✓
Asthma (diagnosed: 30 Jan 1980)	✓
Broken teeth injury with complication (diagnosed: 18 Jan 2019)	✓
Essential hypertension (diagnosed: 16 Mar 2002)	✓
History of domestic abuse (diagnosed: 10 Nov 2018)	✗
Rheumatoid arthritis (diagnosed: 10 Dec 1998)	✓
Sicca (Sjogren's syndrome) (diagnosed: 19 May 1999)	✓
Past	
Angina pectoris (ended: N/A)	✓
Anxiety with depression (ended: 30 Mar 2015)	✓
Anxiety with depression (ended: 07 Apr 2015)	✓
Bile duct calculus + acute cholecystitis and obstruction (ended: 28 Jan 2006)	✓
Endometrial polyp (ended: 05 Feb 2018)	✓
Endometrial polyp (ended: 05 Feb 2018)	✓
Insertion of coronary artery stent (ended: 11 Jan 2018)	✓
Laparoscopic cholecystectomy (ended: N/A)	✓
Major surgical symptoms N/A (ended: 05 Feb 2018)	✓

To include or add information back into the final copy, simply click the greyed-out icon 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.

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https://testa.medidata.net/medicalreport/37/edit/

Apps | SuteCRM | 20000-NAMES.COM | The Corncob list of ... | Intercorn

Joseph O'Grady
General Practice Manager

Instructions
User Management
Account

Patient info

Medications

Acute Repeat Add medications

14 Feb 2018 - Methotrexate 2.5mg tablets, 12.5mg (Five Tablets) To Be Taken Weekly, 20 tablet

25 Mar 2016 - Amlodipine 10mg tablets, One To Be Taken Each Day, 28 tablet

28 Mar 2014 - Citalopram 20mg tablets, One To Be Taken Each Day, 14 tablet

28 Jan 2012 - Glyceryl trinitrate 400micrograms/dose pump sublingual spray, Spray One Or Two Doses Under Tongue And Then Close Mouth As Directed, 1 x 180 dose

Additional contextual information

Further information related to this section of the report

Update Report

Consultations

28 Mar 2014 - eMR Medidata (General Medical Practitioner)

Problem: Anxiety with depression

History: Low mood, tearful, poor appetite, low energy

History: No suicidal ideation

History: 19 / 27

Medication: Citalopram 20mg tablets, One To Be Taken Each Day, 14 tablet

Follow up: Anxiety with depression

Social: Current non-smoker

Social: 8 U/week

Social: Social drinker

07 Apr 2014 - eMR Medidata (General Medical Practitioner)

Insertion of coronary artery stent (ended: 11 Jan 2018)

Laparoscopic cholecystectomy (ended: N/A)

Menopausal symptoms NOS (ended: 05 Feb 2018)

Total abdominal hysterectomy NEC (ended: 20 Sep 2006)

Additional contextual information / missing problems

Further information related to this section of the report

Should a 'Significant Condition' be redacted from this section, all references to it will be removed from the report. You can unredact at any time prior to submitting the final report.

Update Report

Allergies

Allergies Add allergies

Update Report

Bloods

	25 Jun 2017	30 Jan 2017	14 May 2016
Sodium	141 mmol/L	138 mmol/L	135 mmol/L
Potassium	25 Jun 2017	30 Jan 2017	14 May 2016
	4.1 mmol/L	4.8 mmol/L	4.8 mmol/L
Urea	25 Jun 2017	30 Jan 2017	14 May 2016
	4.5 mmol/L	4.8 mmol/L	3.7 mmol/L
Creatinine	25 Jun 2017	30 Jan 2017	14 May 2016
	75 umol/L	89 umol/L	76 umol/L
Bilirubin	30 Jan 2017	30 Jan 2017	N/A
	18 umol/L	18 umol/L	
ALP	30 Jan 2017	30 Jan 2017	N/A

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.

Medidata | buckingham palace - Google S... |

https://testa.medidata.net/medicalreport/37/edit/

Apps | SuteCRM | 20000-NAMES.COM | The Corncob list of ... | Intercorn

Joseph O'Grady
General Practice Manager

Instructions
User Management
Account

Patient info

07 Apr 2014 - eMR Medidata (General Medical Practitioner)

Problem: Anxiety with depression

History: Low mood, PHQ-19. Commenced citalopram 1 week ago. Less anxious already

History: Still tearful, low energy, low mood

History: No suicidal ideation

19 Nov 2014 - eMR Medidata (General Medical Practitioner)

Problem: Acute tonsillitis

History: Sore throat 3/7. Swallowing fluids but unable to swallow foods. No drooling. Feverish. No cough. Swollen gland in neck

History: Has RA and on methotrexate

Examination: 38.1 degrees C

Examination: 104 beats/min

Examination: Left cervical LNs palpable, tender. Throat erythematous, tonsillar exudates

Comment: Likely tonsillitis, centor score 4/4, explained bacterial vs viral

Comment: Agreed for antibiotics and check bloods as on MTX - check for agranulocytosis

Test Request: Venous blood specimen

22 Apr 2015 - eMR Medidata (General Medical Practitioner)

Problem: Menopausal symptoms NOS

History: 53yr old lady. periods stopped 13months ago. Concerned has menopause symptoms. Lots of night sweats, flushing, having to throw off sheets. Vaginal dryness, discomfort on ST. Generally feeling low and lethargic.

History: No FH VTE or breast cancer

Comment: Likely menopausal related symptoms, very keen to try HRT. Discussed importance of weightloss, exercise and avoiding alcohol.

Comment: Can have continuous prep, needs endometrial protection

Comment: Is aware of risks - CVD, VTE, breast cancer. Aware of cardiac hx, HRT ok if well controlled. Agreed check lipids.

Comment: Review in 3 months

Medication: (NOT ISSUED) Femoston-conti 1mg/5mg tablets (Mylan Ltd) One To Be Taken Each Day, 64 tablet

Test Request: Venous blood specimen

22 Jul 2015 - eMR Medidata (General Medical Practitioner)

ALP

	30 Jan 2017	30 Jan 2017	N/A
	98 IU/L	98 IU/L	

ALT

	30 Jan 2017	30 Jan 2017	N/A
	45 IU/L	45 IU/L	

Albumin

	30 Jan 2017	30 Jan 2017	N/A
	40 g/L	40 g/L	

Triglycerides

	25 Jun 2017	30 Jan 2017	25 Jun 2017
	1.7 mmol/L	1.71 mmol/L	1.7 mmol/L

Total Cholesterol

	25 Jun 2017	30 Jan 2017	25 Jun 2017
	5.1 mmol/L	5.5 mmol/L	5.1 mmol/L

HDL

	25 Jun 2017	30 Jan 2017	25 Jun 2017
	1.4 mmol/L	1.21 mmol/L	1.4 mmol/L

LDL

	25 Jun 2017	30 Jan 2017	25 Jun 2017
	3.35 mmol/L	3.45 mmol/L	3.35 mmol/L

HbA1c

	30 Jan 2017	30 Jan 2017	N/A
	26.8 mmol/mol	26.8 mmol/mol	

Additional contextual information

Further information related to this section of the report

Update Report

Attachments

- 24 Jan 2018 - Fit Note Document (Diagnosis: Rheumatoid arthritis; Duration 24-Jan-2018 - 29-Jan-2018)
- 23 Jan 2018 - Cardiac Interventions - Angiography
- 15 Mar 2017 - Rapid Access Chest Pain Clinic
- 18 Sep 2016 - Gynaecological Oncology

Additional contextual information

Further information related to this section of the report

Update Report

Towards the end of the record you will also see 2 free text fields where you can add additional comments.

'Update Record' to save any changes.

Finalise and Submit

I confirm that:

- this medical report relates to the correct patient ("Patient").
- this medical report is an accurate reflection of the information contained in the electronic medical record of the Patient at the date this medical report is submitted; the contents of this medical report are limited solely to the information which relates to the requested conditions for the Patient, as listed in "Patient Info";
- I have not willfully redacted, without good reason, any information from the electronic medical record of the Patient which should be included in the medical report being submitted; and
- I have reviewed the medical report and it does not contain reference to third parties or any Sensitive Conditions of the Patient. I acknowledge that the "Sensitive Conditions" are those conditions listed in the following link [here](#).

Signed off by: **Bruce Wayne**

☒ I accept that MediData Exchange Ltd cannot be held responsible for the content of this report as the data redaction process is approved by me, the Data Controller.

last updated: Jan. 18, 2019, 3:29 p.m.

VIEW REPORT **SAVE DRAFT** **SUBMIT**

You will not be able to amend this report once submitted

It is recommended that you 'View Record' so that you can see all the changes you have made in 'clean' output version.

The preview of the record will open in a new tab in your browser so please close this down to continue with the processing of the SAR.

The screen below shows a preview of the Patient record with all redactions made.

Final Report

Joseph O'Grady General Practice Manager

Medical Record

- 24 Jan 2018 - Fit Note Document (Diagnosis: Rheumatoid arthritis; Duration 24-Jan-2018 - 29-Jan-2018)
- 23 Jan 2018 - Cardiac Interventions - Angiography
- 15 Mar 2017 - Rapid Access Chest Pain Clinic
- 18 Sep 2016 - Gynaecological Oncology

Medical Record

Patient Details

Name: Mrs Sarah Giles Date of birth: 21 Sep 1962
 Sex: F Address: 33 The Crescent, Cwmbran, NP44 7JG
 NHS number: 2000000002

Instruction Details

Requesting Party
 Requested Conditions
 Reference Number

Patient Profile

Height	N/A	N/A	21 Sep 2017 171 cm	21 Sep 2017 171 cm
	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A
Weight	N/A	N/A	21 Sep 2017 59.5 kg	21 Sep 2017 59.5 kg
	N/A	N/A	N/A	N/A
	N/A	N/A	N/A	N/A

Once viewed, you can either **'Save Draft'** and come back to this later or **'Sign off'** and complete the processing of the SAR.

Additional Questions

No additional questions.

Add any additional comments

Additional information

Update Report

Finalise and Submit

I confirm that:

- this medical report relates to the correct patient ("Patient");
- this medical report is an accurate reflection of the information contained in the electronic medical record of the Patient at the date this medical report is submitted; the contents of this medical report are limited solely to the information which relates to the requested conditions for the Patient, as listed in "Patient Info";
- I have not willingly redacted, without good reason, any information from the electronic medical record of the Patient which should be included in the medical report being submitted; and
- I have reviewed the medical report and it does not contain reference to third parties or any Sensitive Conditions of the Patient. I acknowledge that the "Sensitive Conditions" are those conditions listed in the following link [here](#).

Signed off by: **Bruce Wayne**

☒ I accept that MediData Exchange Ltd cannot be held responsible for the content of this report as the data redaction process is approved by me, the Data Controller.

last updated: Jan 18, 2019, 3:29 p.m.

VIEW REPORT SAVE DRAFT SUBMIT

You will not be able to amend this report once submitted.

To **'Sign off'** select your name from the drop down and tick the box below to take acknowledge your role in producing for the copy of the record. Accept the MediData disclaimer by ticking the box and press Submit.

Press **'Submit'** and another option to confirm your decision to submit will be offered on screen- see below. You can **'Proceed'** if you are happy or **'Go Back'** and change or save as draft.

Are you sure you wish to submit the report ?

Once submitted the report cannot be edited

Proceed Go Back

Update Report

Finalise and Submit

I confirm that:

- this medical report relates to the correct patient ("Patient");
- this medical report is an accurate reflection of the information contained in the electronic medical record of the Patient at the date this medical report is submitted; the contents of this medical report are limited solely to the information which relates to the requested conditions for the Patient, as listed in "Patient Info";
- I have not willingly redacted, without good reason, any information from the electronic medical record of the Patient which should be included in the medical report being submitted; and
- I have reviewed the medical report and it does not contain reference to third parties or any Sensitive Conditions of the Patient. I acknowledge that the "Sensitive Conditions" are those conditions listed in the following link [here](#).

Signed off by: **Bruce Wayne**

☒ I accept that MediData Exchange Ltd cannot be held responsible for the content of this report as the data redaction process is approved by me, the Data Controller.

last updated: Jan 18, 2019, 3:29 p.m.

VIEW REPORT SAVE DRAFT SUBMIT

You will not be able to amend this report once submitted.

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 to incomplete saved SARs?

Any SARs that you may have saved to complete later will be shown as Incomplete in the Instruction Pipeline- this is the landing page of eMR. You will also receive email notifications reminding you to complete them

What happens next for the Patient?

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

- The Patient will receive an email notification telling them the SAR is complete and a link to access it. (Copy of this email given below).
- The Patient will then receive an access code on their mobile and can access their record.
- Next the Patient will have the option to authorise a 3rd Party to access their record e.g. their Solicitor who may have sent you a letter of instruction.
- The Patient inputs the 3rd party information using the official documentation they have, and the Solicitor will go through a similar dual factor authentication process to access the record.
- The Patient initially authorises the Solicitor 30 days access their medical record. After this period the patient can extend this period if they so wish.

MediData will handle any queries raised by the patient and an email address is given within all correspondence, to get in touch with us.

If your Patient or Solicitor requires further information about this GDPR compliant SAR process, please use the template letters and information guides which can be found within the 'Resource Centre' accessed within the left side menu section of the screen.

Copy of notification to Patient

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.

Once logged in, a short video is available for to you view, which will provide further information and assistance.

Access your log-in page, via this link: www.weblink

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

Medidata Support Team www.medi2data.com

(This email maybe subject to slight changes)

eMR: support and training completely free to your surgery

Our support team are available from 8.30-17.30 weekdays.

email: emr@medi2data.com

Tel: 03333 055 774 (local call rates apply)

For a call back [click here](#) to book into our calendar

www.medi2data.com