

# SARs User Guide for EMIS Web Users

## 'Process SARs and Medical Reports in minutes'

Version 3

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# 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 GPs 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.

Look out for this 'chat box' icon. This gives you instant access to our Support teamsimply click and type



### eMR: support and training completely free to your surgery

Our support team are available from 8.30-17.30 weekdays.

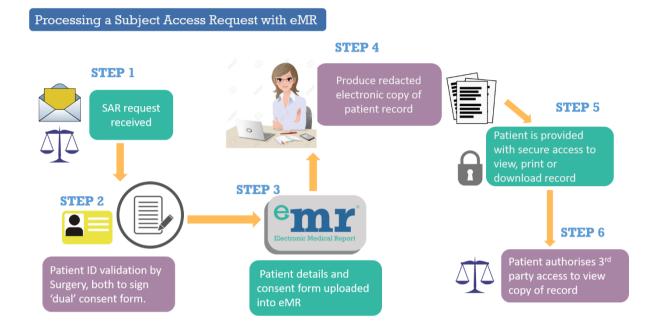
email: emr@medi2data.com

**Tel: 03333 055 774** (local call rates apply)

For a call back click here to book into our calendar

www.medi2data.com

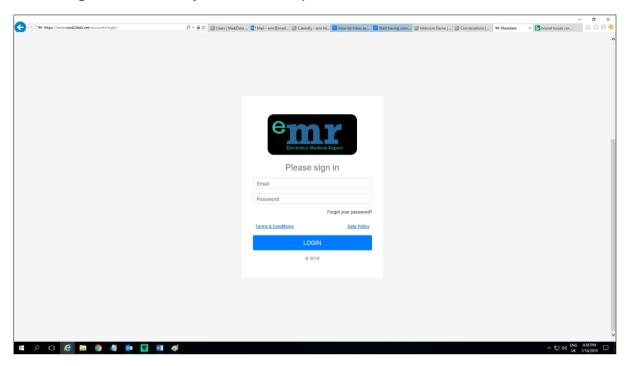
#### Overview of Process



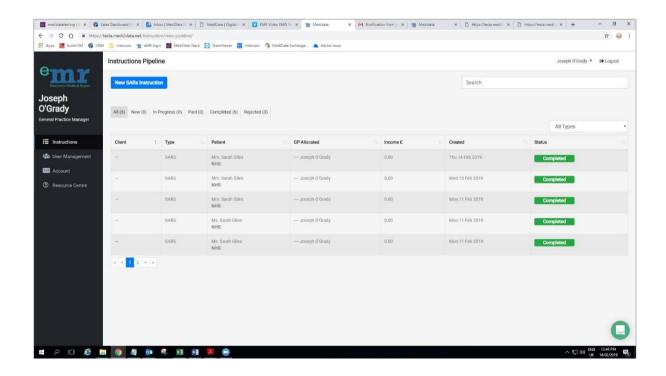
- 1. GP surgery receives a Subject Access Request (SAR).
- 2. **GDPR Patient ID validation process and the signing of the 'dual consent' form** involves the patient visiting the GP surgery with 2 forms of ID.
- 3. Surgery inputs patient details into eMR and uploads the 'dual' consent form, containing 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 sensitive and 3<sup>rd</sup> 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. **The Patient**, when securely in the portal, may **authorise a third 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 third 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

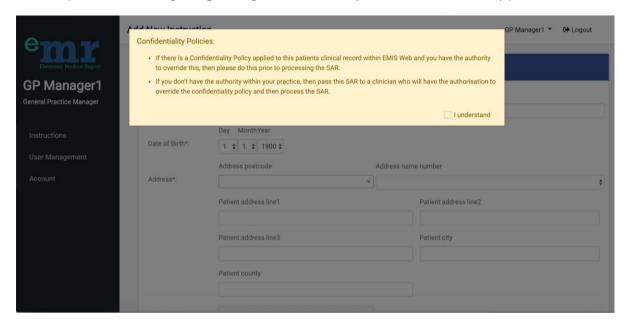


You will then reach the 'Instruction Pipeline' screen



#### Press 'New SAR Instruction'

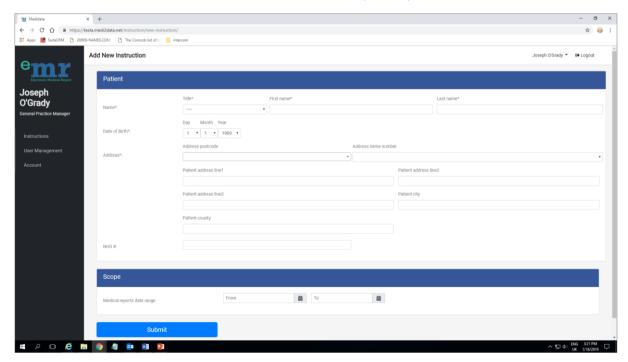
This important message regarding Confidentiality Policies will then appear.



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

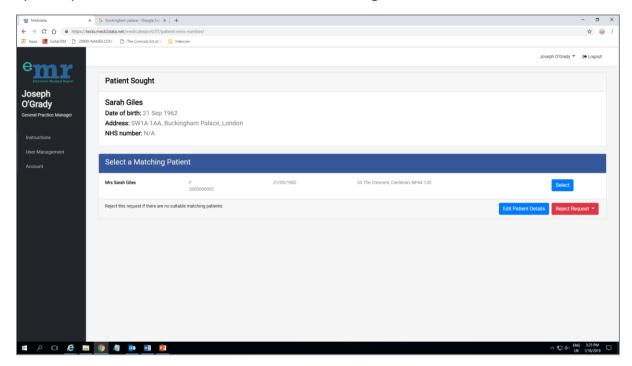
#### Locate the correct Patient on your system

Enter Patient details- all asterisked fields are compulsory.



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

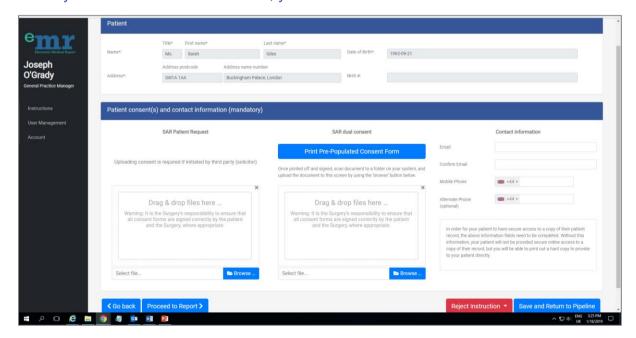
The next screen will show you any records that match the patient details. From the options presented- 'Select' the correct or 'Matching Patient'.



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

- i) 'Edit Patient Details' and re-enter the information. Or
- ii) 'Reject 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.



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 youbut it is not essential.

#### ii. SAR Dual Consent

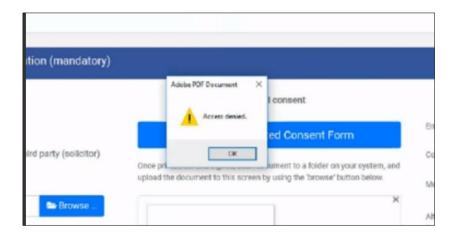
This consent form allows MediData to securely hold the patient's medical information and provide them with secure online access to a copy of their medical record. We do this by requesting an email and mobile phone number within the form\*.

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 online 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.

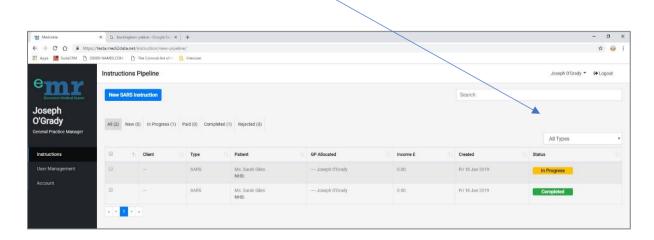
If your patient would prefer to collect their record in person, you can save the record as a PDF and print it off for them.

You now have a choice:

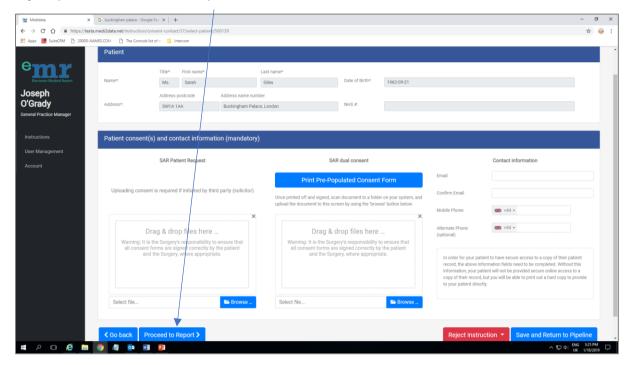
- i. 'Save' what you have done so far and come back to this later.
- ii. You can 'Reject Instruction' (again you would have to give reasons for doing so)
- iii. You can 'Proceed to a Record'

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

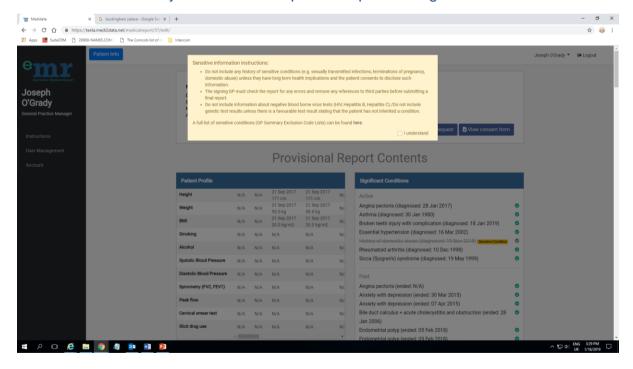
Notice also the different options around the status of a SAR: New, In Progress, Completed, Rejected. 'Paid' refers to insurance report instructions which is addressed in a user guide relating to insurance (AMRA) instructions. You can filter by status by selecting from the menu.



#### If you press 'Proceed to Report'



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

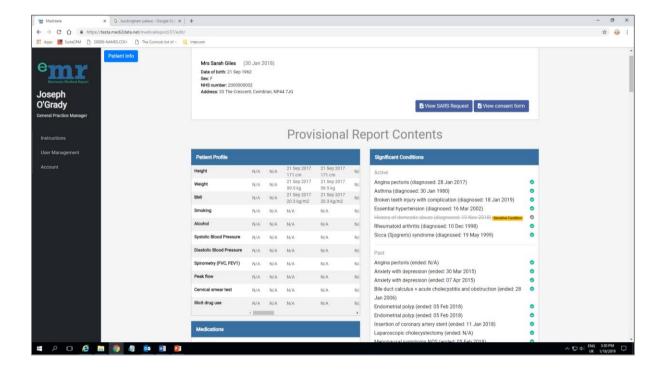


This box tells you that you need to accept responsibility for checking for 3<sup>rd</sup> parties and other sensitive information. eMR will assist using its auto-redaction process but it is your responsibility to ensure that all data included in the SAR is relevant and necessary. **Please tick the box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

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

#### On the screen below:

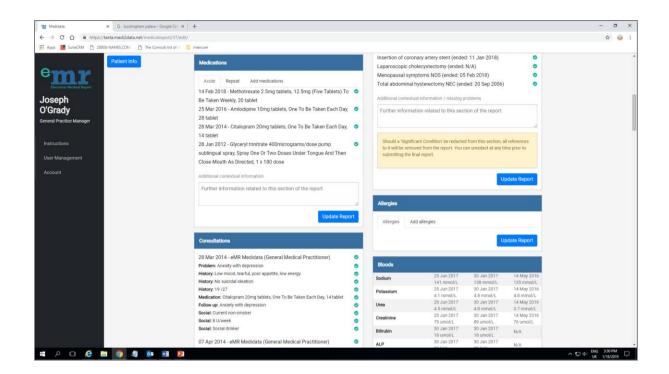
- i. You can view the Patient information in the top banner of the screen and view the SAR and dual consent forms
- ii. Elements of the record, which eMR proposes to redact, are shown as being crossed out. These elements are: sensitive conditions and 3<sup>rd</sup> party references.



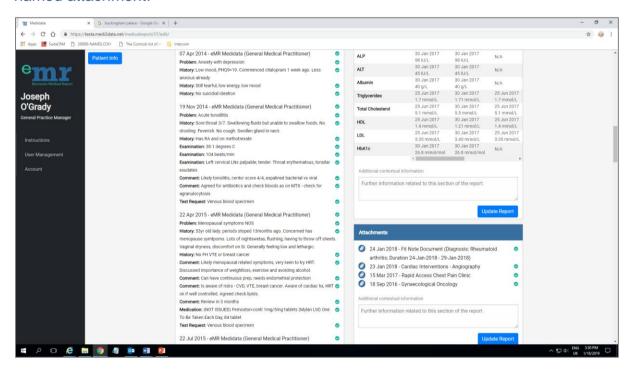
**To include** or add information back into the final copy, simply click the text or the greyed-out icon to the right of the entry.

**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.

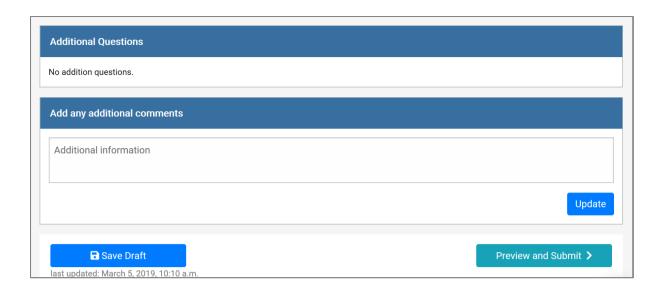


You can **add or remove attachments** using the same method as described above. To view the attachments simply click on the paperclip icon to left of each named attachment.



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

'Update Record' to save any changes.



If you choose to save the report as a draft, you will be taken back to the instructions pipeline screen where you can will be able to continue this report later, or start a new SAR

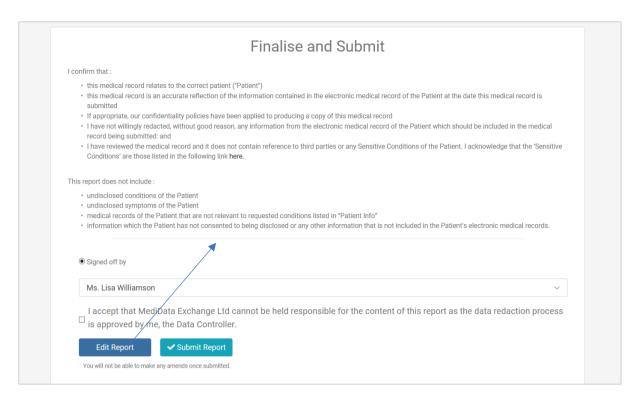
Preview and submit allows you to see what the final SAR would look like before allowing you to complete the report. (Screen below)



The left- hand column shows all the attachments that have been included. You can click on any of the ones shown in blue- to view.

You will notice, in the example above, there is one shown in green. If you want to view this document, you will need to download it.

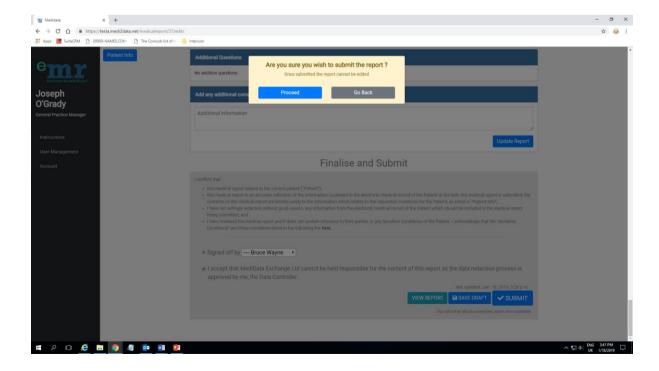
To do this: click onto it and click 'download' to save to your computer or view this document within EMIS Web. When the patient receives their record electronically, they will also have to download their record to view this attachment.



When you are happy with the report-simply '**Sign off**'. To do this: select your name from the drop down and tick the box below to acknowledge your role in producing the copy of the record.

Next- Accept the MediData disclaimer by ticking the box.

You now either continue editing by pressing 'Edit' or 'Submit'. If you choose to Submit you will be asked to confirm your decision once again- see below. You can 'Proceed' if you are happy or 'Go Back' and change or save as draft.



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 a text letting them know an email has been sent to them so that they can access their record. (The reason for the text, is that the email may land in their junk folder and could be missed).
- 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 3<sup>rd</sup> Party to access their record e.g. their Solicitor who may have sent you a letter of instruction.
- The Patient inputs the 3<sup>rd</sup> 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.

Access your log-in page, via this link: [patient specific 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)

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