



SARs User Guide for EMIS Web Users



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

Version 4

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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 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

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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'

Client	Type	Patient	GP Allocated	Income £	Created	Status
—	SARS	Mr. Sarah Giles NHS:	Mrs. Joe O'Grady	0.00	Wed 8 May 2019	Completed
—	SARS	Miss Sarah Giles NHS:	Mrs. Joe O'Grady	0.00	Tue 7 May 2019	In Progress
—	SARS	Miss Sarah Giles NHS:	Mrs. Joe O'Grady	0.00	Thu 2 May 2019	In Progress
—	SARS	Mr. Sarah Giles NHS:	Mrs. Joe O'Grady	0.00	Wed 1 May 2019	Completed
—	SARS	Mrs. Sarah Giles NHS:	Mrs. Joe O'Grady	0.00	Wed 1 May 2019	Completed

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

Confidentiality Policies:

- 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.
- 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.

☐ I understand

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'



Medidata x +
https://testa.medi2data.net/instruction/new-instruction/
Apps SuiteCRM 20000-NAMES.COM The Cornob list of Intercam

Joseph O'Grady Logout

Add New Instruction

Patient

Name*: Title* First name* Last name*

Date of Birth*: Day Month Year
1 1 1900

Address*: Address postcode Address name number

Patient address line1 Patient address line2

Patient address line3 Patient city

Patient county

NHS #:

Scope

Medical reports date range From To

Submit

Windows Taskbar: 1/18/2019 3:21 PM

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

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buckingham palace - Google S...
https://testa.medi2data.net/medicalreport/37/patient-emis-number/
Apps SuiteCRM 20000-NAMES.COM The Cornob list of Intercam

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

Mrs Sarah Giles	F	2000000002	21/09/1962	33 The Crescent, Cwmbran, NP44 7JG	Select
-----------------	---	------------	------------	------------------------------------	--------

Reject this request if there are no suitable matching patients: Edit Patient Details Reject Request

Windows Taskbar: 1/18/2019 3:25 PM

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.

eMR
Electronic Medical Record

Instruction Pipeline
User Management
Account
Dashboard
Fee and Payment
Resource Centre

Logout

Patient Sought

Sarah Giles
Date of birth: 21 Sep 1962
Address: CF24 0EB, Admiral Law, Brunel House, 2 Fitzalan Road, Cardiff, South Glamorgan
NHS number: N/A

[View consent form](#)

Select a Matching Patient

Mrs Sarah Giles	F 2000000002	21/09/1962	33 The Crescent, Cwmbran, NP44 7JG	Select
-----------------	-----------------	------------	------------------------------------	------------------------

Reject this request if there are no suitable matching patients:

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

- Inappropriate consent / consent not properly obtained
- Inappropriate instruction for Subject Access Request
- No suitable patient can be found
- The instruction can not be processed by the due date
- The patient is no longer registered at this practice
- The report failed to generate
- Cancel instruction by client.

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.

eMR
Electronic Medical Record

Patient

Name*: Title* First name* Last name* Date of Birth*
 Mrs. Sarah Giles 21/09/1962

Address*: Address postcode Address name number NHS #*
 CF24 0EB Admiral Law, Brunel House, 2 Fitzalan Road, Cardiff, South

Ways to share the record

There are different ways to return the record to your patient / third party. You can select multiple options.

- Direct to the patient (if this option is applicable, please select one option)
 - ☐ Use MDX Dual Consent
 - ☐ Confirmed to patient that agreement exists with Medidata Exchange Limited
- Return to a third party
 - ☐ Send report back to a third party
- Print within the Surgery

You will always have the option of printing the record in the Surgery. You can do this from the pipeline view, by clicking on a any completed record. You do not need to select this option.

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

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.

eMR
Electronic Medical Record

Ways to share the record

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 - ☐ Use MDX Dual Consent
 - ☒ Confirmed to patient that agreement exists with Medidata Exchange Limited
- Return to a third party
 - ☐ Send report back to a third party
- Print within the Surgery

You will always have the option of printing the record in the Surgery. You can do this from the pipeline view, by clicking on a any completed record. You do not need to select this option.

Contact information

Email

Confirm Email

Mobile Phone +44
 Mobile Phone number is max 11 characters.

Alternate Phone (optional) +44
 Mobile Phone number is max 11 characters.

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

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

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.

The screenshot shows the 'Send to a Third Party' section of the eMR interface. The left sidebar contains navigation links: Instruction Pipeline, User Management, Fee Management, Dashboard, Surgery Library, Surgery Management, Invoicing and Payments, and Resource Centre. The main content area has a header stating 'There are different ways to return the record to your patient / third party. You can select multiple options.' Below this are three numbered options: 1. Direct to the patient (with a sub-option 'Confirmed to patient that agreement exists with Medidata Exchange Limited'), 2. Return to a third party (selected, with a sub-option 'Send report back to a third party'), and 3. Print within the Surgery. The 'Return to a third party' section contains input fields for Company (if applicable), Case Reference (if known), Email, Contact Name, and Confirm Email. It also includes a 'Two factor authentication' section with an 'Office Phone (for solicitor for example)' field and a '+44' dropdown. A note states 'Mobile Phone number is max 11 characters.' At the bottom, there is a 'Consent (optional)' section with a file upload area labeled 'Drag and drop files here.' and a green chat icon in the bottom right corner.

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.

The screenshot shows the 'Consent (optional)' section of the eMR interface. The left sidebar is the same as in the previous screenshot. The main content area has the same header and numbered options. The 'Return to a third party' section is still selected. The 'Consent (optional)' section is expanded, showing a file upload area with a dashed box labeled 'Drag and drop files here.' and a note: 'You must upload a valid consent form to proceed with the instruction. Your instruction may be rejected by the Surgery if it is considered invalid.' Below this is a 'Select file...' input field and a 'Browse...' button. A warning box states: 'Warning: it is the Surgery's responsibility to ensure that all consent forms are signed correctly by the patient and the Surgery, where appropriate.' At the bottom, there are four buttons: '< Go back', 'Save and Return to Pipeline', 'Reject Instruction', and a green 'Proceed>' button with a chat icon in the bottom right corner.

3. Create your first draft report

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

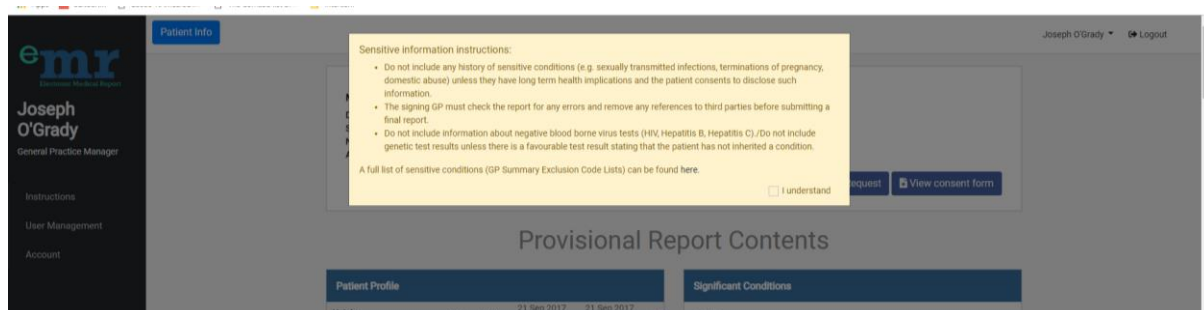
You can also

- 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)

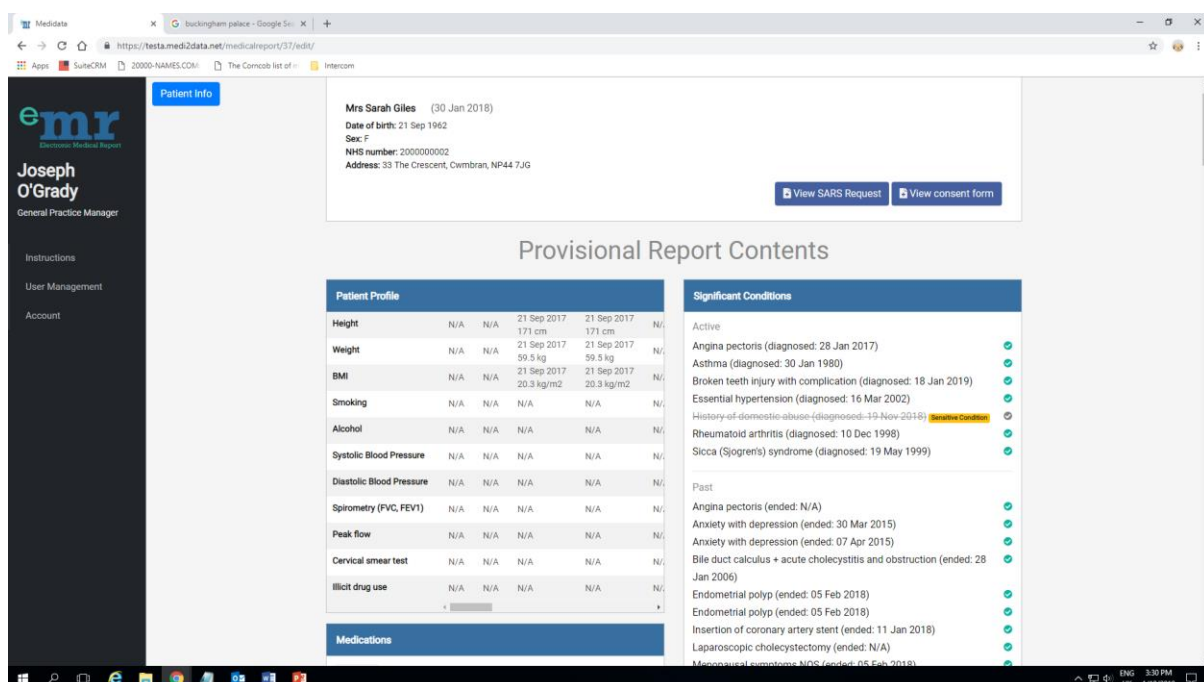
If you **'Save and Return to Pipeline'** you will see this SAR instruction 'In Progress'. eMR will be processing the report in the background and you will be notified when the report is ready.

If you choose to 'Proceed' eMR will begin the autoreduction 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.

The screenshot displays the eMR Medidata web application. The left sidebar shows the user profile for Joseph O'Grady, General Practice Manager, with links for Instructions, User Management, and Account. The main content area is divided into several sections:
 - **Patient info**: A blue header bar.
 - **Medications**: A list of medications with checkboxes for inclusion/exclusion. Entries include Methotrexate, Amlodipine, Citalopram, and Glyceryl trinitrate.
 - **Consultations**: A list of consultations with checkboxes. Entries include 28 Mar 2014 and 07 Apr 2014.
 - **Additional contextual information / missing problems**: A section for further information related to the report.
 - **Allergies**: A section for allergies with an 'Add allergies' button.
 - **Bloods**: A table of blood test results for Sodium, Potassium, Urea, Creatinine, Bilirubin, and ALP.
 - **Update Report**: A blue button at the bottom right of the main content area.

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.

The screenshot displays the eMR Medidata web application, specifically the Attachments section. The left sidebar shows the user profile for Joseph O'Grady. The main content area is divided into several sections:
 - **Attachments**: A list of attachments with checkboxes for inclusion/exclusion. Entries include 24 Jan 2018 - Fit Note Document, 23 Jan 2018 - Cardiac Interventions - Angiography, 15 Mar 2017 - Rapid Access Chest Pain Clinic, and 18 Sep 2016 - Gynaecological Oncology.
 - **Additional contextual information**: A section for further information related to the report.
 - **Update Report**: A blue button at the bottom right of the main content area.

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.

Final Report

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

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

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'**

Patient info

Additional Questions

No additional questions.

Add any additional comments

Additional information

Are you sure you wish to submit the report ?
Once submitted the report cannot be edited

Proceed 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.

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

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t: 0333 3055 744 (local rates apply)

w: www.medi2data.com

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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