SARs User Guide for EMIS Web Users

'Process SARs and Medical Reports

in minutes'

Version 3

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eMR and all support and training, are free of all charges

Our support team are available from 8.30-17.30 weekdays.

email: emr@medi2data.com

Tel: 0333 3055 774 (local call rates apply)

For a call back click here to book into our calendar

www.medi2data.com

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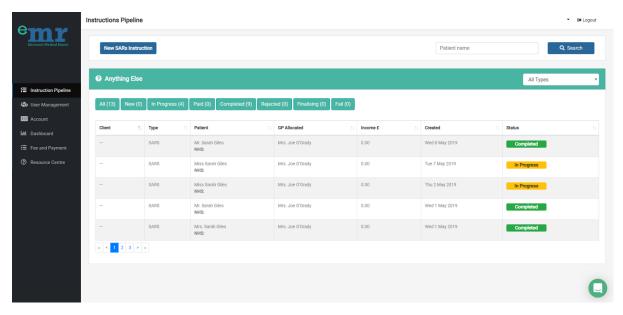
To Process a SAR (Subject Access Request) log in to eMR with your username and password

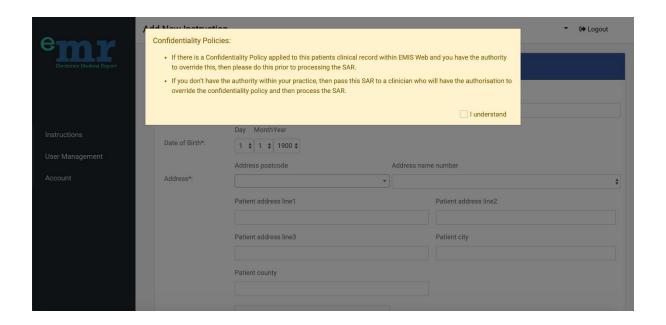 https://emr.medi2data.com/accounts/login

You will then reach this 'Instruction Pipeline' screen.

This screen shows all your instructions at different stages: 'In Progress', 'Completed', 'Redacting', 'Finalising' and 'Rejected' We will cover these later.

To begin processing a new SAR click 'New SARs Instruction.'

You will first see this box regarding your surgery confidentiality policy. Tick this box if you are authorised to proceed.
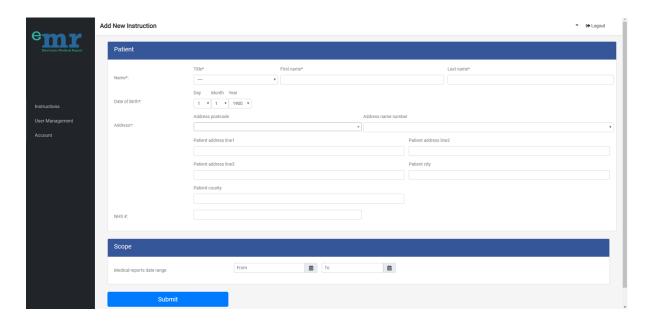

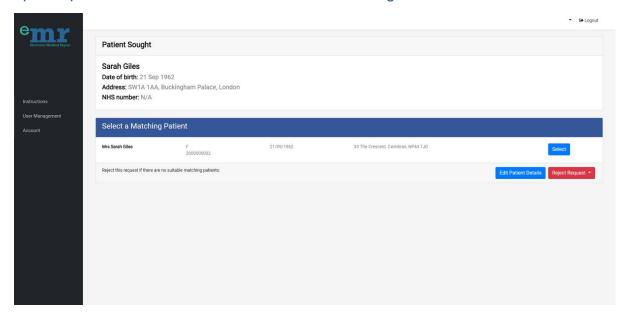# Step 1: Locate the correct Patient on your system

Enter Patient details- all asterisked fields are compulsory.

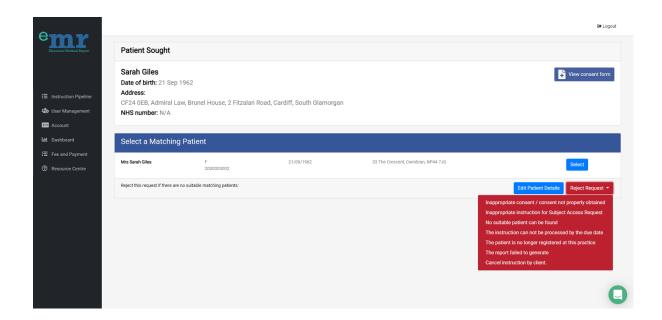Enter 'scope' i.e. date range if appropriate.

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
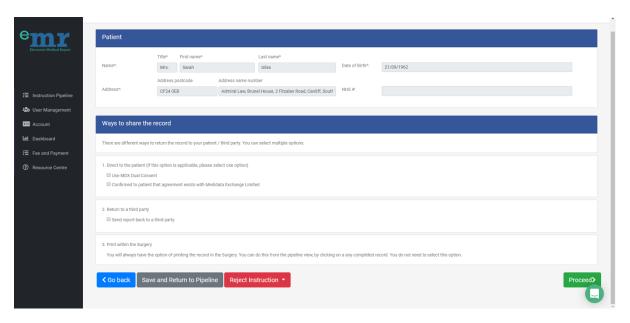

If you do not see the correct patient details, you can either

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

    ii)   'Reject the Request' and select a reason for doing so from the drop-down menu- see below.

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.

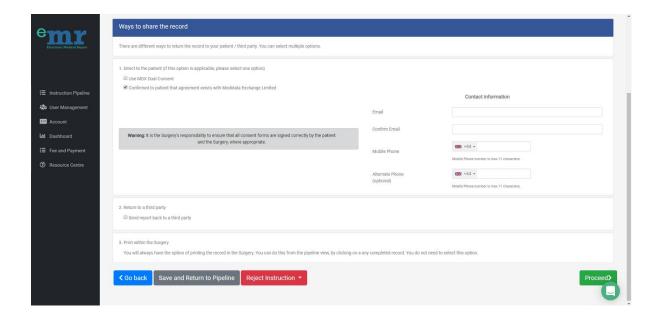This new improved SARs process gives you all the options you could possibly need- as requested by our users.

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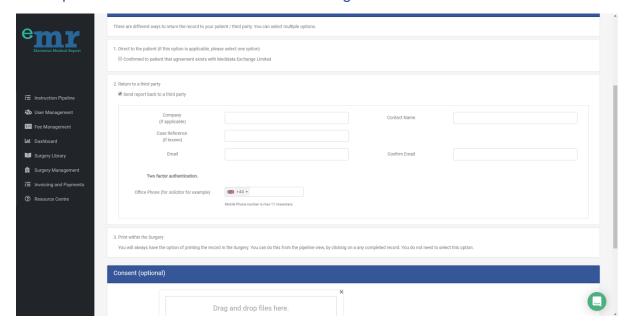
You are not required to upload the consent form, but you must take responsibility for ensuring that appropriate consent is in place before proceeding.

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.
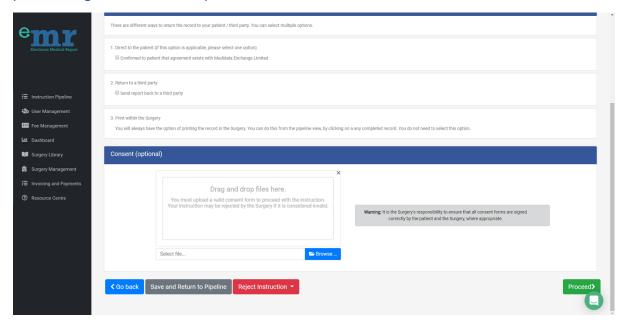

iii) Printing and downloading the report

This option is available to you once the report is finalised.

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

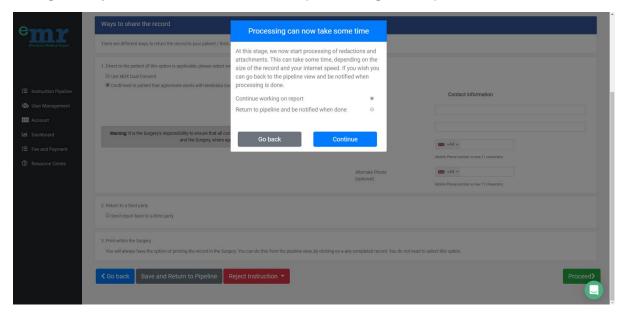Uploading the patient consent form is optional.

However, you must take responsibility if you decide not to upload any consent before proceeding to create the report.

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

3. Create first draft report

Next you will be asked if you would like to carry on with the report now or allow the redaction to take place in the background. If you select for it to redact in the background you will be notified when the processing is complete.
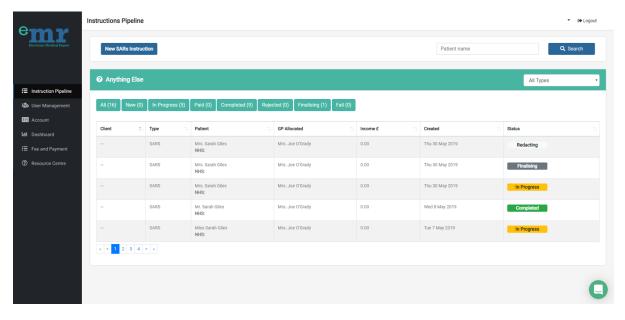
If you select to continue working on the report the auto-redaction will begin on the record and any attachments and you will see this loading screen.
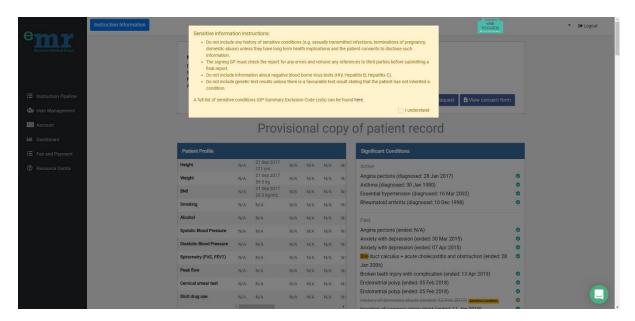

You have the option to go back to the pipeline and work on other requests or continue with any other work you have. You can of course wait a few moments for the redaction process to complete- it will vary depending upon the size of record

If you select **'Return to Pipeline'** you will see this SAR on the top row showing as a **'Redacting'** status. Once redaction is complete status will change to **'In Progress'**.

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.
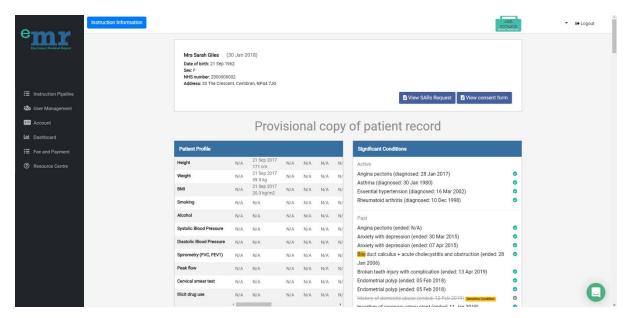
This box tells you that you need to accept responsibility for checking for 3rd parties and other sensitive information. You can access a full list of sensitive conditions through here as supplied from NHS digital TRUD.

Please tick the box to accept to continue.

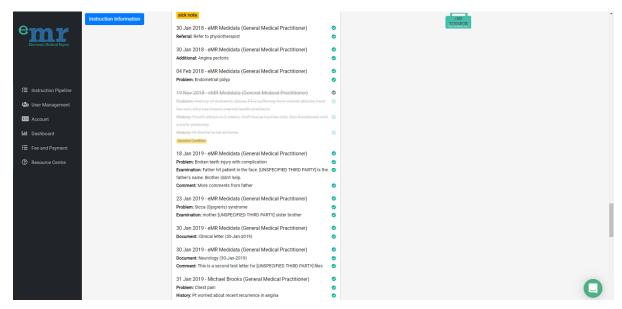## 4. Review Auto-redactions within Report and Attachments

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

Auto-redactions are based on SNOMED CT codes and Read codes. Sensitive conditions are based on NHS Digital TRUD. It is still important that you review these auto-redactions.

Elements of the record, which eMR proposes to redact, are shown as being crossed out. Sensitive conditions will have been crossed out and highlighted and 3rd party references will be replaced by [UNSPECIFIED].

The yellow highlighted areas are to bring to your attention where an auto redaction has been suggested for sensitive conditions and sick notes.

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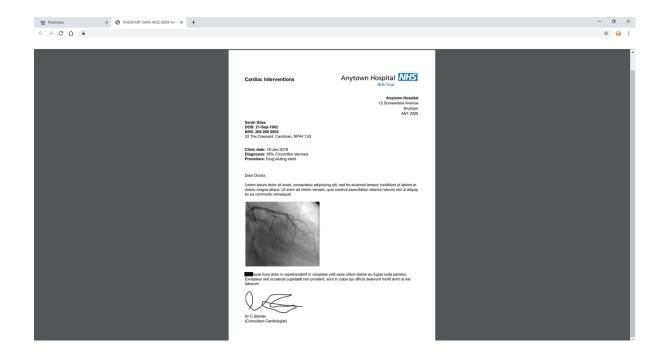
To exclude or redact information, simply click the green tick to the right of the entry.

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

Attachments

Auto-redaction of third-party references and sensitive conditions also applies to attachments. To view the attachments simply click on the paperclip icon. The number of redactions that have taken place on each attachment are indicated by an orange number.
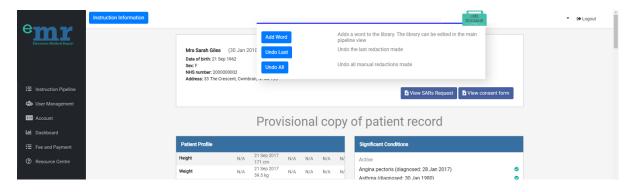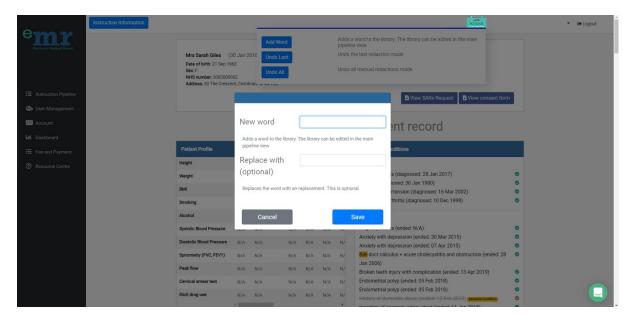
5. Manual Redactions using eMR ToolBox

This unique powerful editing feature allows you to do your own manual redactions **within the patient record**. Simply click the icon to view its functionality.

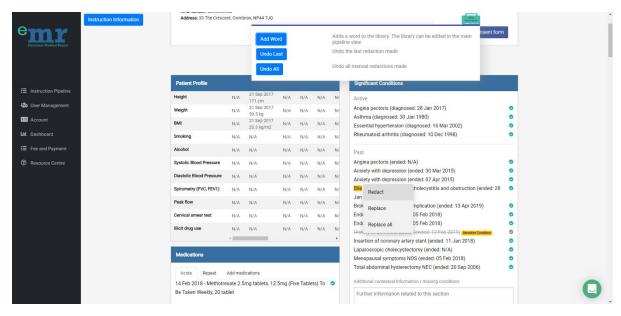*(Please note the ToolBox is unavailable for attachments).

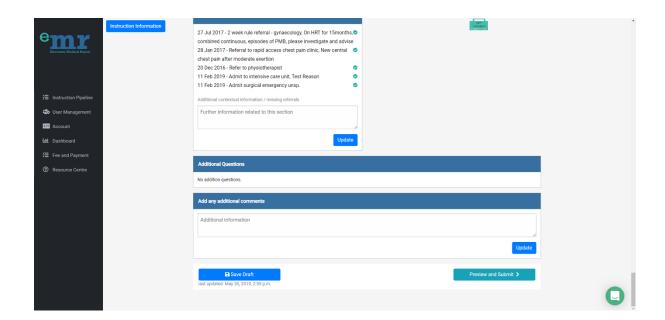'Find and replace' a word or phrase of your choice by clicking 'Add Word'.

You can replace it with an alternative word or something more non-descript like 'XXXX' or 'Unspecified'. It's your choice. You can build up a library of words using this feature as eMR will remember your saved words.

The second piece of functionality you have is to hover over a highlighted word and 'redact' or 'replace' it once. Or 'replace all' throughout the document.
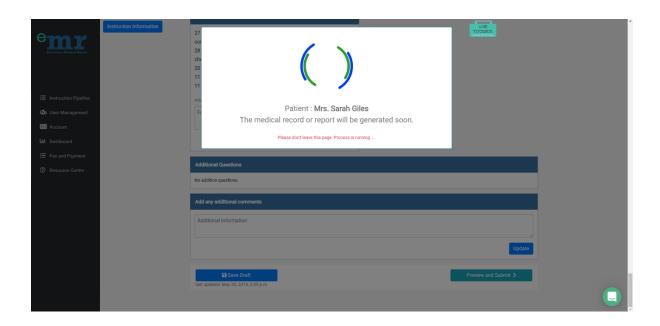

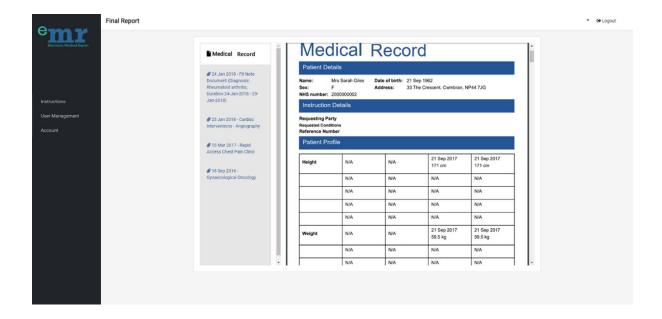Throughout the report there are options to add additional comments at the end of each section using free text boxes, simply press 'Update' to save these comments. Please note, no redaction takes place in the free text fields.

Then press 'Preview and Submit' to view the final draft of the report.

You will see this processing screen. Shortly after your report will then be readable in a pdf format.
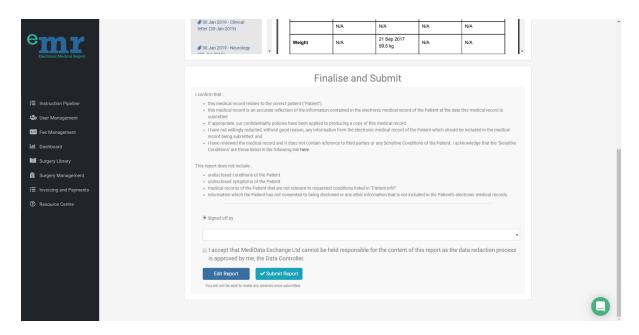
Scroll down to view the report and click into each attachment to view them.

Any attachments in green can only be downloaded not viewed- this is due to their file format.
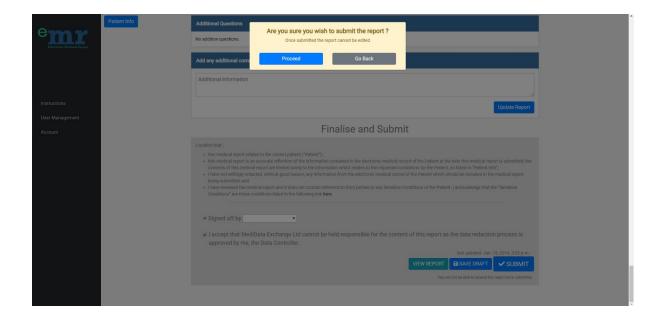
Once viewed, you can either **'Save Draft'** and come back to this later or **'Sign off'** and complete the processing of the SAR by pressing **'Submit'**.

To '**Sign off**' select your name from the drop down and tick the box below to acknowledge your role in producing the copy of the Patient record.

Press '**Submit'.**

You will have the option to 'Proceed' or 'Go Back'

When you press **'Proceed'** the SAR instruction has now been completed.

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

What happens next for the Patient?

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

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

MediData Support Team www.medi2data.com

Patient Steps in order to receive their report.

➢ The Patient will then receive an access code on their mobile and can access their report

➢ 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. They can do this by following the on-screen instructions.

➢ The Patient initially authorises the Solicitor 30 days access to their medical record, which can be extended by 30-day instalments.

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

If your patient or Solicitor requires further information as to how and why this GDPR compliant SAR process works, please use the template letters and information guides which can be found within the 'Resource Centre'.

This can be accessed within the left side menu section of the eMR screen.

eMR and all support and training, are free of all charges

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