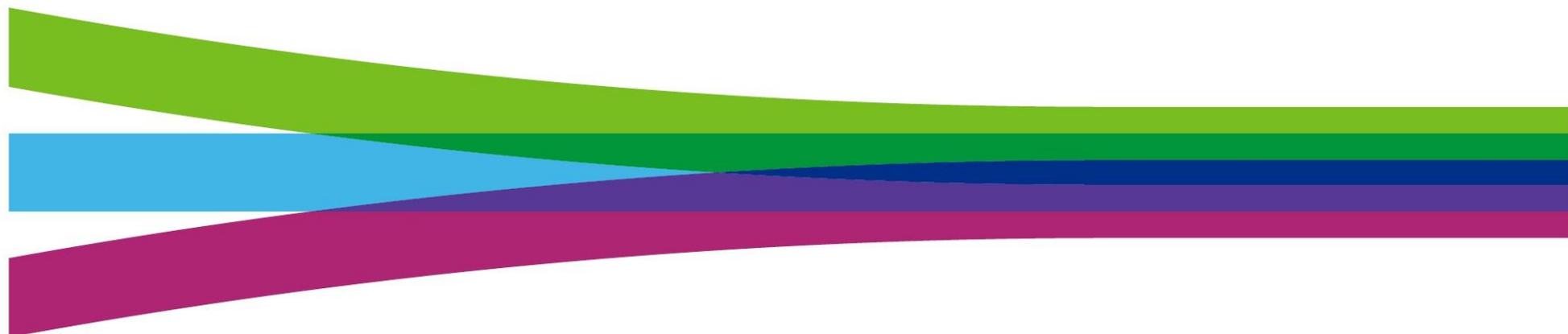




**Bath and North East Somerset,  
Swindon and Wiltshire**  
Clinical Commissioning Group

# Accelerating Patient Online Access Webinar

Bath and North East Somerset, Swindon and Wiltshire Primary Care



# Introductions

Named GP for Safeguarding Adults for BaNES  
Dr Olga Bourke

Named GP for Safeguarding Children for BaNES  
Dr Donna Redman

Named GP for Safeguarding for Swindon  
Dr Michelle Sharma

Named GP for Safeguarding for Wiltshire  
Dr Helen Osborn

# Agenda

Introduction

Housekeeping

Aims

What is the change?

Key take home messages

How to prevent access where required

Other relevant information

Pop-up box trial

Q&A

# Housekeeping

Session will be recorded

Mikes off

Hand up if you wish to speak

Will also read out questions from the chat

# Aims of webinar

- Full understanding of what is happening
- What practices need to do now



# What is the change?



# Current process

The screenshot displays a medical software interface with a central dialog box titled "Amend Online Services". The dialog box is divided into several sections:

- Services (Self)**: Contains checkboxes for "Allow appointment booking", "Allow medication requesting" (checked), "Allow completing questionnaires\*", "Allow viewing summary record" (checked), and "Allow coded or full record". It also includes radio buttons for "Detailed coded record", "Full clinical record", and "Full record with coded record before review date". A note states: "\* Indicates that the service isn't currently offered here".
- Request for services made**: Includes radio buttons for "Verbally" (selected) and "In writing".
- Medical Record Review Dates (Self)**:
  - Coded record**: Includes radio buttons for "Show all coded content" and "Show coded content from" (selected), with a dropdown menu.
  - Full record**: Includes radio buttons for "Show full content" (selected) and "Show full content from".

At the bottom of the dialog box are "Ok" and "Cancel" buttons. Below the dialog box, a status bar shows "Summary record access" with a green checkmark and the word "Granted".

The background interface includes a top navigation bar with "Presenting...", "Give control", and "Stop presenting" buttons. A left sidebar contains navigation options like "Patient", "Appointments", "Reporting", "Audit", "Setup", "Links", "Dispensing", and "Clinical Tools". A right sidebar shows patient information for "Mr Nic DoN" at "1 Newlands Home (pref)" with phone number "999 050 990".

# Current process continued

SystemOne GP: Dr Michelle Sharma (Clinical Practitioner Access Role) at Vic...

Presenting... Give control Stop presenting

Amend Online Services

**Services (Self)**

- Allow appointment booking
- Allow medication requesting
- Allow completing questionnaires\*
- Allow viewing summary record
- Allow coded or full record
  - Detailed coded record
  - Full clinical record
  - Full record with coded record before review date

\* indicates that the service isn't currently offered here

Request for services made  Verbally  In writing

**Medical Record Review Dates (Self)**

Coded record

- Show all coded content
- Show coded content from [dropdown]

Full record

- Show full content
- Show full content from

OK Cancel

Mr Nic De  
1 Newlar  
Home (p  
999 050 !

er patient's acco

# What will the change be?



Prospective full access to the record for anyone that has the NHS app



Any entry into the record.



Initially Systmone only, Emis to follow



Current plan to switch on in April



**The decision as to whether the patient can view it will be taken by the clinician at the time of entering onto the record**

# How will that change happen?

---

Legal request given by NHSX to Systmone

---

Creation of a script within Systmone

---

Overnight all patients will have their online full access box turned on via this script on a date in April

---

Once a patient logs in to the NHS app they will be able to see any future entries.

---

# What will be visible



Full text of future entries



Documents (full, not part)



Results



Appointment information & independent codes added

# Key take-home messages

1. This is coming!
2. The patient will be able to see the entry immediately
3. The risk is that someone other than the patient will view the record, which is a risk to that patient if information disclosed about abuse is visible
3. All staff need to know how to prevent online access to avoid this situation

# How to prevent online access - Systmone

Right click on the date/time of any entry  
Choose “do not show in the online record”  
OR  
Go to event details screen  
Deselect “visible in the online record”



# Click on date / time

SystemOne GP: Dr Michelle Sharma (Clinical Practitioner Access Role) at Victoria Cross Surgery - Patient Record

nt Appointments Reporting Audit Setup Links Dispensing Clinical Tools Workflow User System Help

Search Task Discard Save Details Next Acute Note

Mr Nic DoNotUse 01 Jan 1970 (52 y) M  
1 Newlands, St. Helens, Ryde P033 1TT  
Home (preferred): 0115 678699  
999 050 9964 Applied, Victoria Cross Surgery

Next Event Event Details Pathology Drawing Auto-Consultation Settings

Administrative No problems linked to this section

History Test test test

Examination

Diagnosis

Intervention No interventions recorded

Plan

New Section Merge Delete

Searching in the journal shows results after any applied filtering. This does not include results from consultations in collapsed admissions. The search box only searches on patient data currently visible in the journal. This message can be hidden by going to User > User Preferences > Patient Record > New Journal and disabling the 'Show search warning' check box.

Custom Filter Search

Date	Time	Event	Notes	Actions
Thu 10 Feb 2022	10:22	Surgery: Dr Michelle Sharma	H: child safeguarding concern	Clinically Relevant, Admin Event, Amend Details, View Amendments, View For Date, Filter, Part of Shared Record, Mark Event as Private, Safeguarding Relevant
Thu 10 Feb 2022	10:23	Surgery: Dr Michelle Sharma	H: third	Do not show in the online record
Thu 10 Feb 2022	10:39	Surgery: Dr Michelle Sharma		Do not show in the online record
Thu 10 Feb 2022	15:01	Surgery: Dr Michelle Sharma		Do not show in the online record
Thu 10 Feb 2022	16:03	Surgery: Dr Michelle Sharma		Do not show in the online record
Fri 11 Feb 2022	14:51	Surgery: Dr Michelle Sharma		Do not show in the online record
Mon 14 Feb 2022	11:59	Surgery: Dr Michelle Sharma		Link to Appointment or Visit...
Mon 14 Feb 2022	13:26	Surgery: Dr Michelle Sharma	H: Test test test	Show Journal Entry..., Problems, Mark in Error

57 Journal Entries

rich features

0 41 0 0 41 150 0 0 0 0 0 2 0 0 101 0 0 0 0 13

13:26  
14/02/2022

# Event details

SystemOne GP: Dr Michelle Sharma (Clinical Practitioner Access Role) at Victoria Cross Surgery - Patient Record

Patient Appointments Reporting Audit Setup Links Dispensing Clinical Tools Workflow User System Help

Search Task Discard Save Details Next Acute **Note**

Next Event Event Details Pathology Drawing Auto-Consultation Settings

Clinical Administrative

No problems linked to this section

History Test test test

Examination

Diagnosis

Intervention

Plan

New Section Merge Delete

Searching in the journal shows results after going to User > User Preferences > Pathology

Adult safeguarding con

Thu 10 Feb 2022 10:22 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS H: child safeguarding con

Thu 10 Feb 2022 10:23 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS H: third

Thu 10 Feb 2022 10:39 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS

Thu 10 Feb 2022 15:01 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS

Thu 10 Feb 2022 16:03 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS

Fri 11 Feb 2022 14:51 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS

Mon 14 Feb 2022 11:59 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS

Mon 14 Feb 2022 13:26 - Surgery: Dr Michelle Sharma (Clinical Practitioner Access Role)  
MS H: Test test test

57 Journal Entries

Event Details

Date & Time

Exact date & time Mon 14 Feb 2022 13:26

Template Apply Template New Template

Staff

Event done by  Known staff member Dr Michelle Sharma  Unknown

Staff type Clinical Practitioner Access Role

Authorised by Dr Michelle Sharma

Location

Organisation Victoria Cross Surgery

Other location Surgery Save as default

Comments

Contact

Contact method Face to face  Clinically relevant  Admin event

Event is incomplete (can be amended later)

Link to referral No linked referral Update Referral Status End Referral  Include ended referrals

Link to team No team selected

Visibility

Normal (Part of the shared record)  Private (Not part of the shared record)

Safeguarding Relevant

Visible in the online record

Activities

Add Delete Amend

Activity Type With Duration

No activities recorded

Ok Cancel

Search features 0 41 0 0 41 150 0 0 0 0 2 0 0 102 0 0 0 13 13:28

# How to prevent online access - Emis

Within the consultation, click the “online visibility” button in the top ribbon

Choose “do not display in the patient’s online care record.”

OR

Choose an existing entry in the record and right-click

Choose “do not display in the patient’s online care record.”



# Online visibility icon...

The screenshot displays the EMIS Web Health Care System interface. A green box highlights the 'Online Visibility' icon in the top toolbar. A dropdown menu is open, showing two options: 'Display on the patient's online care record' (selected) and 'Do not display on the patient's online care record'. The interface also shows a patient record for MORSE, Endeavour (Inspector), born 01-Jan-1970 (52y), Gender Male, NHS No. 123 456 8888, Usual GP MILLENER, Nick (Mr). The main area displays a consultation history table with columns for Date, Location, and Doctor. The right-hand panel shows a summary of the patient's medical history, including a problem of 'Pain of joint of knee' and a medication of 'Clopidogrel'. The bottom status bar shows the user's role as 'MORSE, Endeavour (Inspector)' and a warning: 'No creatinine albumin in last 12m'.

Date	Location	Doctor
11-Feb-2022 17:37	Master Practice 1	SHARMA, Michelle (Dr)
11-Feb-2022 16:51	Master Practice 1	SHARMA, Michelle (Dr)
28-Jan-2022 15:57	GP Surgery (Master Practice 1)	BROWN, Margarita (Mrs)
17-Jan-2022 11:20	Telephone consultation (Master Practice 1)	BROWN, Margarita (Mrs)

# Right-click on consultation

Complete Draft    Consultations    search    Config    notes

Add/Edit    View    Filter    Print    Config    Search    Fit note

Documents - 2    GP2GP - 19 (19)

New priority Workflow Items received - GP2GP

Smartcard Alert: Organisation mismatch between Smartcard role and EMIS Web role.

Active    MORSE, Endeavour (Inspector)    Born 01-Jan-1970 (52y)    Gender Male    NHS No. 123 456 8888

Usual GP MILLENER, Nick (Mr)

Date	Consultation Text	
11-Feb-2022 17:37	Master Practice 1	SHARMA, Michelle (Dr)
Document	[Provisional] Safeguarding report	Safeguarding report from AE Development - Hospital Triage (WF3) (11-Feb-2022)
11-Feb-2022 16:51	Master Practice 1	SHARMA, Michelle (Dr)
Document	Safeguarding report received	Safeguarding report received from AE Development - Hospital Triage (WF3) (11-Feb-2022)
28-Jan-2022 15:57	GP Surgery (Master Practice 1)	BROWN, Margarita (Mrs)
Problem	Pain of joint of knee (First) Laterality: Left	
17-Jan-2022 11:29	Telephone consultation (Master Practice 1)	BROWN, Margarita (Mrs)
Comment	Telephone consultation	
	HAD scale: depr	
17-Jan-2022 10:55	Telephone consultation	BROWN, Margarita (Mrs)
Comment	Depression mon	
Social	Alcohol consum	
Additional	Nursing or other	
Assessment	Patient's condit	
06-Dec-2021 11:31	Home visit note	BOXALL-RAYNER, Elsie (Ms)
Problem	Social phobia	

Edit Consultation  
 Delete Consultation  
 Complete Draft  
 Confidentiality  
**Online visibility**

- Display on the patient's online care record
- Do not display on the patient's online care record**

 Graphical Trend  
 Tabular Trend  
 Audit Trail  
 Information Leaflets

Problems  
 Practice Manager Role | SHARMA, Michelle (Dr) | Organisation: The Very Good Practice | Location: Master Practice 1

MORSE, Endeavour  
 No creatinine

# Making documents not visible



Bit more clunky



In both SystmOne and Emis this cannot be done from the document processing screen. It can in Docman



Systmone and EMIS  
-Need to find the document in the patient record



In the Care Record (EMIS) / New Journal (Systmone)

# Making documents not visible continued...



Systemone - “document workflow not completed”



Emis - “provisional”

View Admin Actions Task Actions Consultation

Documents - 3 GP2GP - 19 (19)

Active **MORSE, Endeavour (Inspector)** Born **01-Jan-1970 (52y)** Gender **Male** NHS No. **123 456 8888**  
Usual GP **MILLENER, Nick (Mr)**

Created	Patient	Document Type	Sender	Source
11-Feb-2022	MORSE, Endeavour (Inspector)	Safeguarding report received	SHARMA, Michelle (Dr)	AE Development -

SHARMA, Michelle (Dr) «

- Tasks 0,0
- Lab Reports 0,0
- Medicine Management 0,0
- GP2GP 19,19
- Document Management 3,0
- Unmatched
- Unmatched
- Inbox
- Awaiting Coding (2, 0)
- Awaiting Filing (1, 0)

Details Document Consultation Summary

**Inbound Document Awaiting Filing**

SHARMA, Michelle (Dr)  
Sent: 11-Feb-2022 16:52

# Emis continued

Summary Consultations Medication Problems Investigations **Care History** Diary Documents Referrals

Edit Delete Sharing Add/Edit

Latest Only Descriptive Text Collapse All

Trend All Data Non Value Data Allergies Health Status Family History Immunisations

Filters Text search Print CR Config Information Leaflets Manage fit notes

- 19 (19)

New priority Workflow Items received - GP2GP

Smartcard Alert: Organisation mismatch between Smartcard role and EMIS Web role.

Active **MORSE, Endeavour (Inspector)** Born **01-Jan-1970 (52y)** Gender **Male** NHS No. **123 456 8888**  
Usual GP **MILLENER, Nick (Mr)**

	Term	Value	Context
-2022	<i>[Provisional]</i> Safeguarding report received	Safeguarding report received from AE Development - Hospital Triage (WF3) (11-Feb-2022)	Attachment
-2022	Pain of joint of knee		Problem; First
-2022	Allergy to kiwi fruit	(Grouped with Food allergy)	Problem; First
-2022	HAD scale: depression		
-2022	Telephone consultation		
-2022	Depression monitor		

Context menu for Safeguarding report received:

- Edit
- Delete
- Confidentiality
- Online visibility
  - Display on the patient's online care record
  - Do not display on the patient's online care record**
- Copy to Local Record

Right sidebar: Safeg... 11-Feb Value

# Emis continued

EMIS Web Health Care System

Summary Consultations Medication Problems Investigations **Care History** Diary Documents Referrals

Add/Edit
 Trend
  Latest Only
  Descriptive Text
  Collapse All
 All Data
 Non Value Data
 Allergies
 Health Status
 Family History
 Immunisations
 Filters
 Text search
 Print
 CR Config
 Information Leaflets
 Manage fit notes

[Test Requests - 3](#)
[Referrals - 4](#)
[Documents - 2](#)
[GP2GP - 19 \(19\)](#)
[Medicine Management - 4 \(2\)](#)
[Registration - 162 \(1\)](#)
[Lab Reports - 1](#)
[Tasks - 11 \(9\)](#)

Active
 **WHITE, Snow (Ms)**
 Born **17-Jun-1966 (55y)**
 Gender **Female**
 NHS No.

Date		Term	Value
11-Feb-2022		Ex-smoker	
11-Feb-2022		C/O: a rash	
11-Feb-2022		Adverse reaction to Prevenar	
11-Feb-2022		Child protection conference report submitted	Child protection conference Report
11-Feb-2022		Safeguarding report	Safeguarding Hub (MASH) Referral Form
03-Jun-2021		Cardiological referral	Cardiological Referral Form 20210603
24-May-2021		Asthma monitoring call first letter	
05-May-2021		Did not attend - no reason	
27-Nov-2020		Referral to health visitor	

- Edit
- Delete
- Confidentiality
- Online visibility
  - Display on the patient's online care record
  - Do not display on the patient's online care record**
- Copy to Local Record

# Docman

Docman 10X | Filing | Tasks | Open PATCHS | Quick Search | Create | Settings | User | Apps | Help | Puriton Clinical

Mr Kai Howard (Docman System Administrator) - PURTON SURGERY

Inbox 6 | 1 of 1 | Actions

Search Inbox | 14-Feb-2022 | New

review Clinical Letter, Urology | Active

Department of Urology

Great Western Hospitals **NHS**  
NHS Foundation Trust

The Great Western Hospital  
Marlborough Road  
Swindon  
SN3 6BB

Outpatient appointments: 01793 604080  
Elective Admission Queries: 01793 646176  
Ampney Ward: 01793 646350

Mr Iacovou's secretary: 01793 646195  
Mr Mathur's secretary: 01793 646195  
Mr Beck's secretary: 01793 646213  
Mr Hawary's Secretary: 01793 646213

Ref: SM/dict8/lk  
Consultant: Mr Amr Hawary

Date: Wednesday, 19 January 2022  
Clinic Date: Friday, 07 January 2022

Dear [redacted]

View in Emis Web

Annotate

Quick Steps

No Action Required | See comment  
Coding Myself

Add Task

Create New Task | Code Highlighted

Add Comment

Free Text | Coding Complete  
Completed

More Actions

View Documents

Add Clinical Codes

Start Discussion

Print

Email

Workflow Tracker Report

Online Services

Allow viewing of this document  
Prevent viewing of this document

Email

Workflow Tracker Report

Online Services

Allow viewing of this document

Prevent viewing of this document

# SystemOne

Scanned Document Update

Ok Ok: and Another Cancel Send Task Add to eWorkflow Print Printer Settings

Born 17-Jul-2017 (4y 6m) Gender Male NHS No. 717 549 3274

⚠ No Known Allergies

Scanned in by [redacted] 09:14

Save to complete later

**Document Summary**  
Location: Hospital  
Letter Type: DNA Letter  
Date: 04 Feb 2022  
Sender: Salt Way Centre  
Recipient: Moredon Medical Centre

No flag set

Annotations

← Previous Next →

Scan Action  
 Complete Later  Forward  Complete

**Re: [redacted]**  
**Paed Therapy Central**

**Sent:** 07 Feb 2022 09:53

**To:** "moredonmedicalcentre@nhs.net"

---

Good Morning

Please see attached information.

[redacted]

Administrative Officer

Paediatric Therapies  
Swindon Borough Council

Direct line: (01793) 464246

[www.swindon.gov.uk](http://www.swindon.gov.uk)

The views expressed in this email are personal and may not necessarily reflect those of Swindon Borough Council

1 2

Show info Show annotations

# SystemOne

Feb 2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	A&E to Abbey Meads Medical Group	
Feb 2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	Paediatrician Letter to Abbey Meads Medical Group (document workflow not completed)	
Feb 2022	Surgery: PINNEGAR, Rachel (Miss) (Systems Support Access Role) , Entered By: PRITCHARD, Charlotte (Mrs)	Seen in accident and emergency department (9N19.)	

10 Feb 2022 10:09 - Surgery: Dr Michele Pinnegar (Systems Support Access Role)  
**H: Child is cause for concern**

10 Feb 2022 10:13 - Surgery: Dr Michele Pinnegar (Systems Support Access Role)  
**H: Child in family is safe**

10 Feb 2022 10:16 - Surgery: Dr Michele Pinnegar (Systems Support Access Role)  
**H: child in need**  
Record contains third party information  
**Safeguarding Swindon**  
**Child Safeguarding**  
Child is on a Child in Need Register  
**Subject of child in need**

- Amend Details
- View Amendments
- View For Date
- Filter
- Part of Shared Record
- Mark Event as Private
- Safeguarding Relevant
- Do not show in the online record**
- Link to Appointment or Visit...
- Show Journal Entry...

Feb 2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	A&E to Abbey Meads Medical Group	
Feb 2022	Hospital: PINNEGAR, Rachel (Miss) (Systems Support Access Role)	Paediatrician Letter to Abbey Meads Medical Group (document workflow not completed)	
Feb 2022	Surgery: PINNEGAR, Rachel (Miss) (Systems Support Access Role) , Entered By: PRITCHARD, Charlotte (Mrs)		

# Important information - basics

---

The new system will not apply to those with proxy access

---

Age 16+

---

Potentially also given to those who are younger and Gillick competent

---

Access re-sets when the person changes surgery to the date they joined the surgery

---

Access to historic information can still be requested directly from the surgery

---

If they sign up to the App in 2024 they will still be able to see everything from April 2022

---

# Important information - general



You can hide information temporarily (i.e. results) until you have discussed the result with that person, at which point it can be released.



Careful of your wording – “malodorous” “unkempt” “inebriated” “difficult consultation” – will GPs be scared to write their thoughts?



If other agencies use SystemOne within their agency and we have a view of this within Primary Care, but it is not part of our record, this will NOT be visible online.

# Important information - awareness

---

Need to raise awareness amongst partner agencies and the public that Primary Care will be hiding any sensitive information from the App so they are not afraid to share information with us

---

Other agencies could mark in a document that they share with us as to whether it is for patient online access or not

---

Ensure that any professionals from other agencies such as midwives that have access directly through our GP Surgery IT system and code in our record are aware of this

---

The same applies to any new starter i.e. GP registrar

---

# Important information - Capacity

---

Those who lack capacity to make the decision as to whether they would like to view their information through the app, shouldn't be given access to their own information through this route

---

Those who potentially lack the capacity to make this decision should have the code “patient needs review before giving patient online access” added to their record so that this can be reviewed with the patient

---

What about people who lose the capacity to make the decision after gaining access to the app?

---

Can be re-considered at annual reviews – i.e. LD/dementia

---

# Invisible redaction

- If someone discloses abuse, do save a visible entry in the notes, otherwise suspicion would be raised.
- Hide the domestic abuse entry
- i.e. two entries will need to be made in the notes for that consultation

# The app

- Certain codes should never be added online ie “history of domestic abuse.” – Not currently a feature
- Can information be screened in real time before being shown to the patient i.e. through iGPR - No
- What work is being done to prevent a person signing up to the app for another person?
  - Coercive control
  - Other abuse situations
  - Parents for their Gillick competent children
  - Where someone lacks capacity

# Pop-up box

- Optional for surgeries to utilise if they wanted an extra safety feature
- Could be implemented CCG wide.
- Will only work for those with Safeguarding codes in the record
- Taken from a list put together from the Named GP coding group
- About to be piloted
- Practices can adapt it for additional situations
  - new registrar
  - when the system launches for a fixed time period
  - For a specific patient or cohort of patients or staff

# Pop-up box

Adult safeguarding concern (766561000000109)  
Child in family is safeguarding concern (1064961000000107)  
Child in need (135891007)  
Child is cause for safeguarding concern (836881000000105)  
Child protection conference report submitted (1036511000000100)  
Child protection strategy meeting (762931000000105)  
DASH (Domestic Abuse, Stalking and Harassment and Honour Based Violence) 2009 Risk Checklist  
Family member subject of child protection plan (375041000000100)  
History of domestic abuse (429746005)  
Lack of mental capacity to make decision (Mental Capacity Act 2005) (787381000000106)  
Looked after child (764841000000100)  
Referral to domestic abuse agency (758599003)  
Referral to multi-agency risk assessment conference (978091000000105)  
Referral to safeguarding adults team (514331000000104)  
Referral to safeguarding children team (514341000000108)  
Safeguarding adults protection plan agreed (943001000000107)  
Subject of child in need plan (836931000000102)  
Subject of multi-agency public protection arrangements (495021000000105)  
Subject of multi-agency risk assessment conference (758941000000108)  
Subject to child protection plan (342191000000101)  
Unborn child is cause for safeguarding concern (878111000000109)

# Pop-up box

SystemOne GP: Dr Michelle Sharma (Clinical Practitioner Access Role) at Victoria Cross Surgery - Patient Record

Mr Nic DoNotUse 01 Jan 1970 (52 y) M  
1 Newlands, St. Helens, Ryde PO33 1TT  
Home (preferred): 0115 678699  
999 050 9964 Applied, Victoria Cross Surgery

Next Event | Event Details | Pathology | Drawing | Auto-Consultation | Settings

Clinical | Administrative

History: **Test**

Examination

Diagnosis

Intervention: *No interventions recorded*

Plan

Continue | Configure

**⚠ Patient Status Alerts**

- 🔔 Eligible for COVID-19 Vaccination: 2020/21 - All Cohorts - Not had 1st dose: - [Action More](#)
- 🔔 Eligible for Influenza Vaccination: 2021/22 - All: - [Action More](#)
- !! Invite for NHS Health Check: - [Action More](#)
- !! Named GP: *Named GP not allocated +/or patient not informed* [Action More](#)
- 🔔 Safeguarding - Adult - Concerns, family concerns or previously vulnerable: - [Action More](#)

Search features

0 67 0 1 68 273 0 0 0 0 1 0 0 241 0 0 0 9 12:31

# Pop-up box continued

SystemOne GP: Dr Michelle Sharma (Clinical Practitioner Access Role) at Victoria Cross Surgery - Patient Record

Mr Nic DoNotUse 01 Jan 1970 (52 y) M  
1 Newlands, St. Helens, Ryde PO33 1TT  
Home (preferred): 0115 678699  
999 050 9964 Applied, Victoria Cross Surgery

**Question**

This box has been triggered because there is a safeguarding code on the record.  
Legislation permits the patient to view their entire patient record unless there is a justifiable reason to withhold an entry or the whole record from view.  
**If this entry can be made visible to the patient** online on saving this record entry, please click **YES** to continue.  
If there is a safeguarding reason why **this record should not be visible to the patient** please click **NO** and de-select the "Visible in the online record" tick box.

Yes No Pause

0 67 0 1 68 274 0 0 0 0 1 0 0 241 0 0 0 9 12:33  
03/02/2022

# Pop-up box continued

The screenshot displays a medical software interface with a pop-up box titled "Event Details" for a patient named "Mr Nic DoNotUse 01 Jan 1970 (52 y) M". The background interface includes a top menu bar with options like "Patient", "Appointments", "Reporting", "Audit", "Setup", "Links", "Dispensing", "Clinical Tools", "Workflow", "User", and "System". A left sidebar lists various patient record sections such as "Patient Home", "New Journal", "Pathology & Radiology", "Radiology", "Read Code Journal (4)", "Special Notes", "Summary Care Record", "Major Active Problems", "Minor Active Problems", "Major Inactive Problems", "GP Registration Details", "Tasks", "Medication", "Prescription History", "Repeat Templates", "Sensitivities & Allergies", "Communications & Letters", "Record Attachments", "Referrals", "Safeguarding Swindon", and "Pathways".

The "Event Details" pop-up box is divided into several sections:

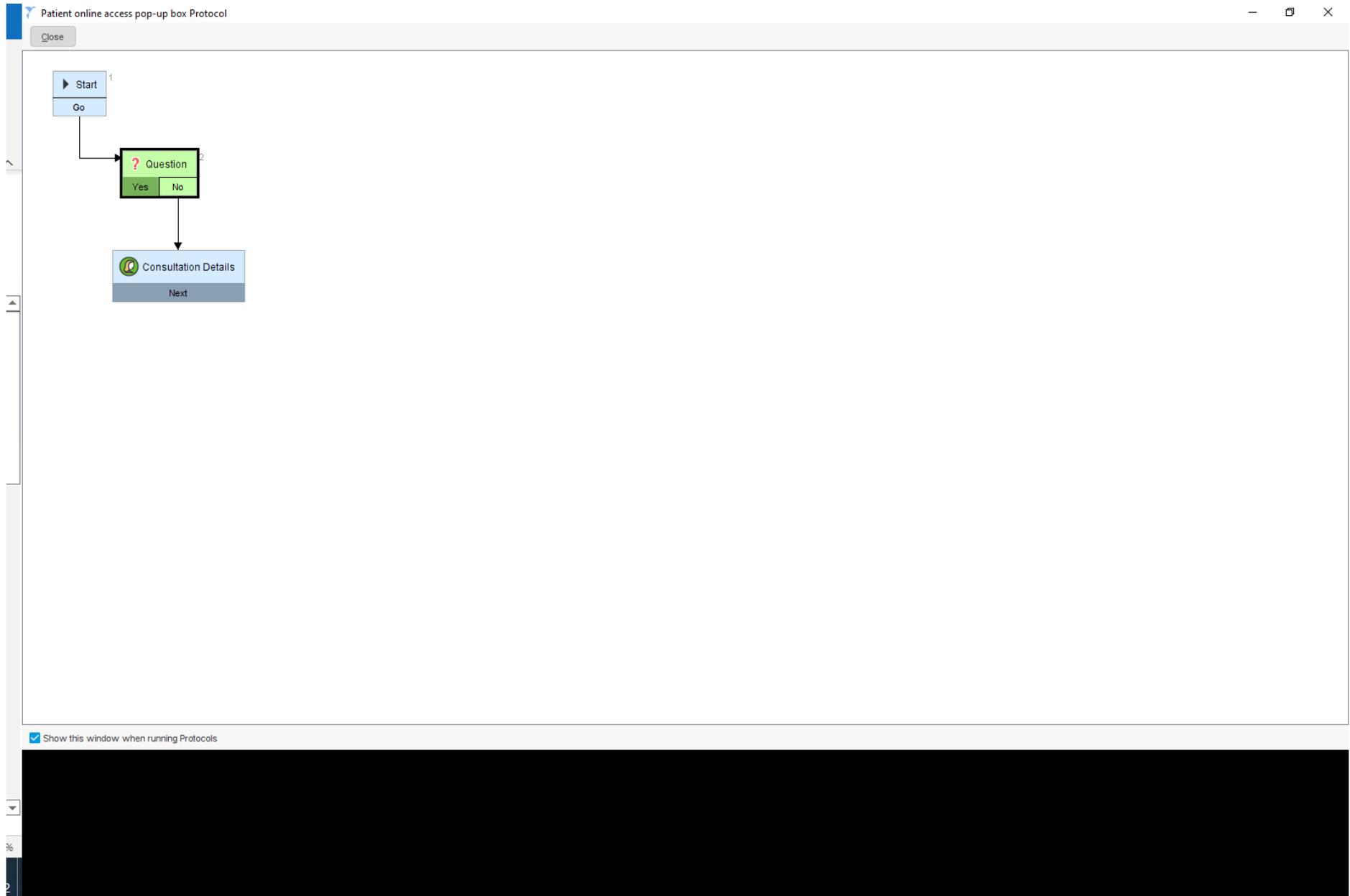
- Date & Time:** "Exact date & time" is set to "Thu 03 Feb 2022" at "12:31".
- Template:** A dropdown menu with "Apply Template" and "New Template" buttons.
- Staff:** "Event done by" is set to "Known staff member" with a search icon and "Dr Michelle Sharma". "Staff type" is "Clinical Practitioner Access Role". "Authorised by" is "Dr Michelle Sharma".
- Location:** "Organisation" is "Victoria Cross Surgery". "Other location" is "Surgery". A "Save as default" button is present.
- Comments:** An empty text input field.
- Contact:** "Contact method" is "Face to face". "Clinically relevant" is selected. "Event is incomplete (can be amended later)" is unchecked. "Admin event" is unselected. "Link to referral" is "No linked referral". "Update Referral Status" and "End Referral" buttons are visible. "Include ended referrals" is unchecked. "Link to team" is "No team selected".
- Visibility:** "Normal (Part of the shared record)" is selected. "Private (Not part of the shared record)" is unselected. "Safeguarding Relevant" is unselected. "Visible in the online record" is checked.

The "Activities" section on the right of the pop-up box is empty, showing a table with columns "Activity Type", "With", and "Duration". Below the table, it says "No activities recorded".

At the bottom of the pop-up box are "Ok" and "Cancel" buttons. The background interface also shows a taskbar with various application icons, a search bar, and system tray information including "10°C", "12:34", and "03/02/2022".



# Protocol box



# If abuse is not known about....



# Finally...

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Mindshift that “patient will be immediately able to see what has been entered”

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How to prevent things being accessed by a patient when required

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Standard of note-keeping

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Need openness with patients and if possible in face-to-face appointments, share what is being written and review the entry together before the patient leaves

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On the telephone consultations, could describe what is being written

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Training for all staff on documentation / hard to reach groups ie locums

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RCGP launching guidance end of March 2022

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# Q&A

