

Using the enhanced Data Sharing Model (eDSM)

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Document History

This section should only be used when a new version of an existing document is created. Newer versions should detail which sections have been amended/added, including who reviewed and approved the document.

Version	Date	Updated by	Approved by	Description
0.1	16/06/2016			Document created.
11	12/03/2020			Various Updates
12.0	18/06/2024	Dr J H Parry		Removal consent override; update to GDPR; re-ordering to move away from consent based model

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Introduction

This document is intended to be used as guidance to the *Enhanced Sharing* functionality.

Enhanced Sharing is the SystemOne sharing model that allows you to record the basis for making a patient's record available to share in and/or share out data at each SystemOne organisation they are cared for. The share settings are explained below. The share out settings also control the flow of data to GP Connect, Cerner HIE, Emis direct integration, MiG and some local shared record systems.

Sharing in

If the patient record is marked to share data into the organisation, your caring organisation will be able to view information entered by any SystemOne service that has set the patient's record to share out.

If the patient chooses to dissent to sharing in, you will not be able to view any of the information entered by other organisations and you will only be able to view information entered at your organisation.

Sharing out

If the patient record is set to share out, the information entered at your organisation will be visible at all other SystemOne organisations the patient is currently cared for (where a share in has been recorded). The share out settings also control the flow of data to GP Connect, Cerner HIE, Emis direct integration, MiG and some local shared record systems.

To illustrate, imagine there is a shared pool of data (see [Figure 1](#)). This is the shared part of the record that is visible at care services that have the patient's consent to view it. If the patient consents to share out, you are adding data to the shared pool. If the patient consents to share in, your care service will be able to view any data in the shared pool.

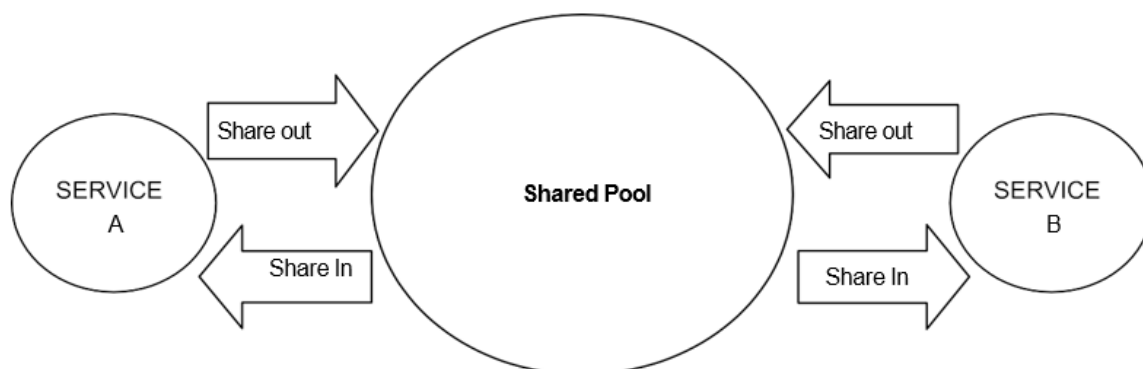


Figure 1: Shared Pool

In the example above, both Service A and Service B can see the data entered into the patient record as the patient has consented to both share in and share out at each service.

General Considerations

Since eDSM was introduced the sharing of data for direct patient care has become the norm. This is supported by the 7th Caldicott principle, GMC advice and the NHS Data Sharing Arrangement for GP Connect. At the same time the gaining of adequate consent as defined in the UK GDPR is considered burdensome, so the accepted legal basis for sharing for direct care is now considered to be:

- for the processing of personal data: Article 6.1 (e) of the UK GDPR: “processing is necessary for the performance of a task carried out in the public interest or in the exercise of official authority vested in the controller”.

These instructions are correct at the date of writing. For further assistance, consult the SystmOne Online Help.

- for the processing of “Special Category Data” (which includes your medical information): Article 9.2 (h) of the UK GDPR: “processing is necessary for the purposes of preventive or occupational medicine, for the assessment of the working capacity of the employee, medical diagnosis, the provision of health or social care or treatment or the management of health or social care systems and services”.

Organisation preferences

To make use of the above and to reduce the burden on staff you can customise SystmOne to control how your organisation uses Enhanced Sharing.

Available preferences

To amend the organisation preferences that affect sharing:

1. Select **Setup>Users & Policy>Organisation Preferences** from the Main Menu.
1. Select 'Clinical Policy>Sharing (Enhanced)' from the Organisation Preferences tree.

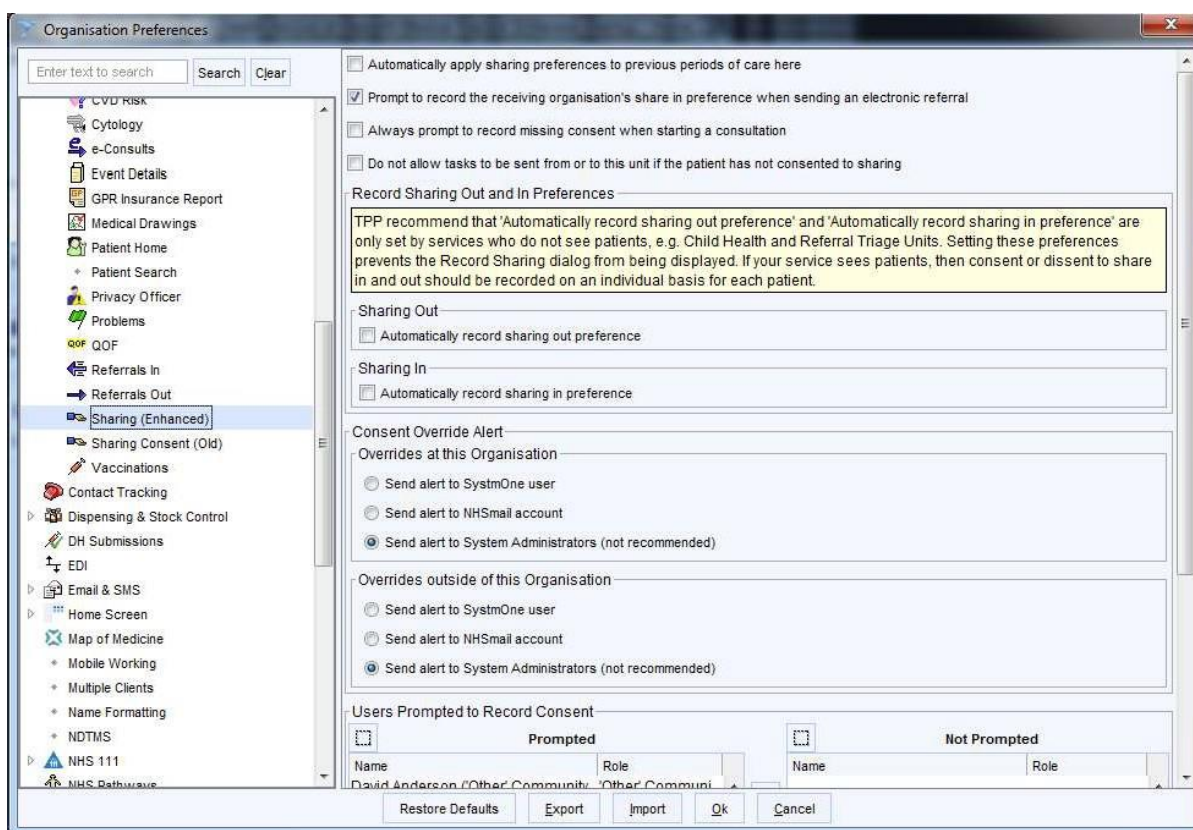


Figure 2: Organisation Preferences Options for Enhanced Sharing

The following organisation preferences are available:

• Organisation Preference	• Description
• Automatically apply sharing preferences to previous episodes of care	• This means if the patient has been registered at your care service previously, the sharing preferences you set for this registration will be applied to all other previous registrations at your care service.

<ul style="list-style-type: none"> • Prompt to record the receiving organisation's share in preference when sending an electronic referral 	<ul style="list-style-type: none"> • This preference controls whether the care service sending a referral is prompted to record the receiving organisation's share preference or not.
<ul style="list-style-type: none"> • Always prompt to record missing consent when starting a consultation 	<ul style="list-style-type: none"> • Selecting this preference will ensure that the Record Sharing dialog is displayed when starting a consultation if the patient does not currently have any share preferences set.
<ul style="list-style-type: none"> • Do not allow tasks to be sent from or to this unit if the patient has not consented to sharing 	<ul style="list-style-type: none"> • This preference is enabled by default, however by deselecting this your service will be allowed to send and receive tasks for patients who have Implied Dissent, or no sharing preferences recorded. Tasks will still continue to be able to be sent and received if the patient has consented to sharing. You will not be able to send tasks for patients who have Explicit Dissent recorded to Share Out, or receive tasks for patients with Explicit Dissent to Share In.
<ul style="list-style-type: none"> • Automatically record sharing in/sharing out preferences 	<ul style="list-style-type: none"> • These preferences will be applied to patients at the point of registration (or retrieval if the patient does not have any sharing preferences set). This means that you will not be prompted to manually complete the Record Sharing dialog as the options you have set in Organisation Preferences will automatically populate the dialog accordingly.
<ul style="list-style-type: none"> • User prompted to record consent 	<ul style="list-style-type: none"> • This preference allows you to select certain staff members to be prompted to record consent when registering/retrieving a patient record.

Note: These preferences will only apply to patients who are registered at the care service after the organisation preference has been set.

Applying default share settings to events added to the patient record

An organisation preference is available to set a default for the sharing visibility of events added to the patient record. This means that, by default, the Event Details dialog will automatically select one of the following:

- **Normal – Part of the shared record**, or
- **Private – Not part of the shared record**, or
- **Safeguarding Child Relevant**

To set up this preference:

1. Select Setup>Users & Policy>Organisation Preferences from the Main Menu.
2. Select 'Clinical Policy>Event Details'.
3. Select the appropriate option for the default event visibility.
4. Click Ok.

Selecting staff who will not be prompted to record sharing preferences on patient retrieval

If your care service has certain staff (or all) that will not be expected to complete the Record Sharing dialog it is possible to prevent the dialog being displayed for these staff when they retrieve a patient.

To do this:

1. Select Setup>Users & Policy>Organisation Preferences from the Main Menu.
2. Select 'Clinical Policy>Sharing (Enhanced)'.

These instructions are correct at the date of writing. For further assistance, consult the SystmOne Online Help.

3. Select the staff member that you do not want to receive the prompt from the 'Prompted' box in the 'Users Prompted to Record Consent' section.
4. Click the arrow button to move the staff member into the 'Not Prompted' box.
5. Click Ok.



Figure 3: Selecting Users Prompted to Record Consent

Record Sharing dialog

To record an individual patient's sharing preference you will need to use the Record Sharing dialog.

The Record Sharing dialog will appear (see controls above) when you first register a patient or retrieve a patient who has no sharing preferences recorded. This dialog will also appear if only one half of the dialog is complete, for example if just the sharing out preference has been recorded.

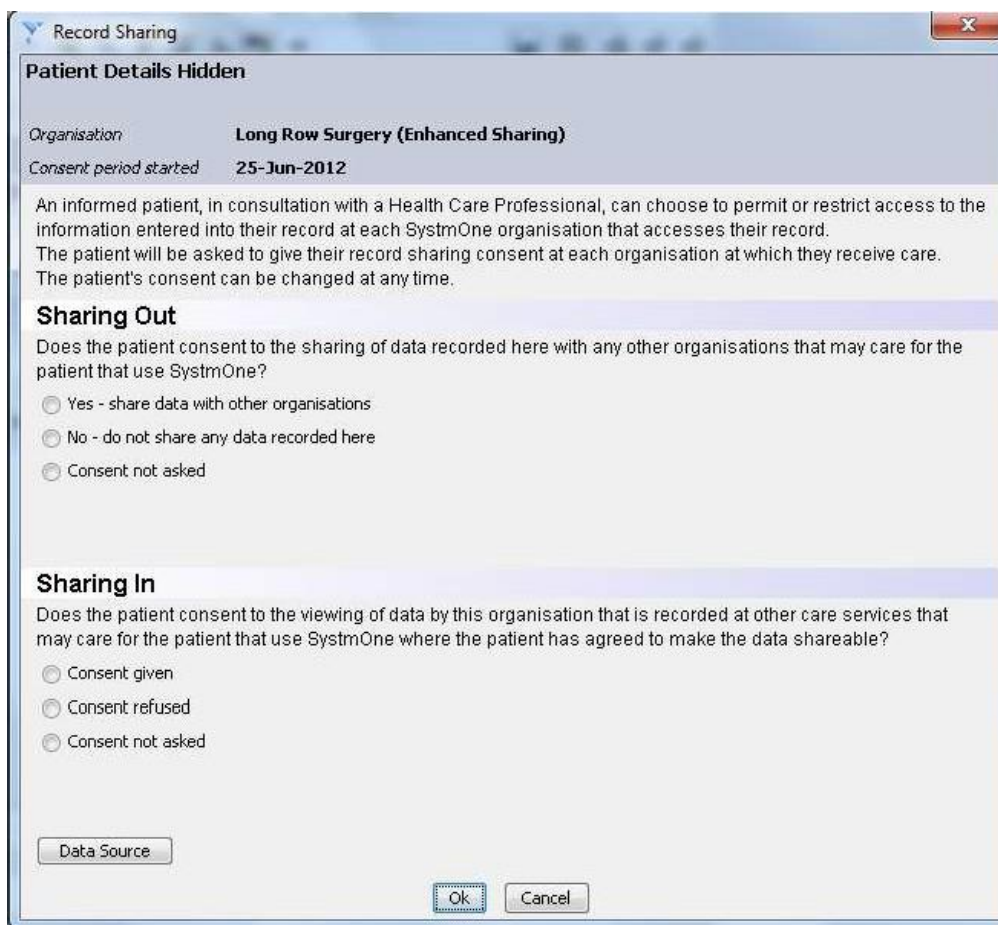



Figure 4: Record Sharing Dialog

You can also amend the patient's share settings from the patient record. To do this:

1. Retrieve the patient record.
2. Select the Administrative tree.

3. Select the 'Record Sharing' node.
4. Do one of the following:
 - right click and select **Record Sharing**, or – click 

From this node you will also be able to amend sharing preferences for previous episodes of care. To do this:

1. Right-click on an episode and select the **Change Consent** (see Figure 3). The Record Sharing dialog will then be displayed, pre-populated with the preferences that were originally set against that episode.
2. Change the preferences so that they represent what the patient wishes to set against that episode.
3. Click **Ok**.



Figure 5. Changing the consent preferences for previous episodes of care

All other care services that have explicitly or implicitly selected to share out can be viewed from the 'Record Sharing' node of the Clinical tree in the patient record. This behaves in the same way as the Sharing Consents dialog. The organisations at which the patient has given explicit consent to share out or have implied consent recorded to share out will be listed; this allows patients to see what information will be visible to this care service should they record consent to share in. Please see the section on [Viewing Other Care Services that Share the Patient Record](#) for further information.

This sharing model allows you to record share settings that accurately display who has selected the preferences, including whether the patient was present or not. This information is visible from the Tabbed Journal.

Selecting a sharing out preference

Select from one of the options available:

- **Share data with other organisations** - This will share out the data recorded at this organisation into the shared pool. Any other caring organisation that is sharing in will be able to see this data. By selecting this option you are recording that the patient was present and requested to share out.

Note: Any data marked as private will continue to be private, regardless of whether consent to share out has been recorded.

- **Do not share any data recorded here** - This will prevent any data recorded at this organisation from being shared out. No other caring organisation will be able to see this information, even if they are sharing in. By selecting this option you are recording that the patient was present and requested not to share out.

Selecting a sharing in preference

Select from one of the options available:

- **Share in** - This option will allow you to see any data that has been shared out from other caring organisations. By selecting this option you can record whether the patient was present and requested to share data in.

These instructions are correct at the date of writing. For further assistance, consult the SystmOne Online Help.

- **Consent refused** - This means that no data recorded at other organisations will be visible at your organisation.

Recording a sharing preference for a patient who is not present

If the patient is not present or is unable to answer the sharing questions, you will be able to select **Consent not asked** and further options will become available. To record the setting, select the most relevant option then click **Ok**.

Note: When you choose to share and view the shared record without obtaining patient consent, you will be required to record a comment to explain why. This field is mandatory.

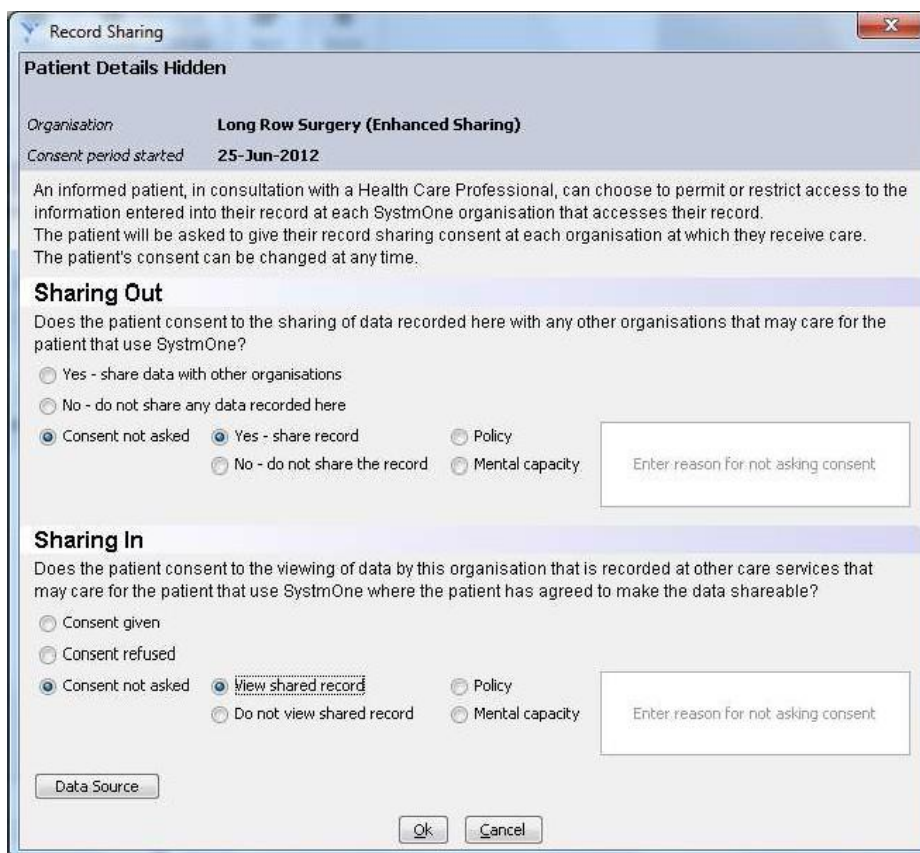


Figure 6: Record Sharing Dialog

The table below shows the options available when sharing out:

• Consent	• View Record	•	• Outcome
• Consent not asked	• View shared record	•	• This will allow data to be shared out. This should be selected if a local policy has been agreed. You will be required to enter a reason at this point. By selecting this option you are recording that you have not asked the patient or the patient was unable to answer the share out question.

<ul style="list-style-type: none"> Consent 	<ul style="list-style-type: none"> View Record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Outcome
<ul style="list-style-type: none"> Consent not asked 	<ul style="list-style-type: none"> View shared record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> This option will allow data to be shared out. By selecting this option you are recording that you have not asked the patient or the patient was unable to answer the share out question. You will be required to enter a reason at this point.
<ul style="list-style-type: none"> Consent not asked 	<ul style="list-style-type: none"> Do not view shared record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> This will prevent data from being shared out. By selecting this option you are recording that the patient has not been asked.

The table below shows the options available when sharing in:

<ul style="list-style-type: none"> Consent 	<ul style="list-style-type: none"> View Record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> Outcome
<ul style="list-style-type: none"> Consent not asked 	<ul style="list-style-type: none"> View shared record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> This option will allow data to be shared in. This should be selected if a local policy has been agreed that if a patient is not present you should share in. You will be required to enter a reason at this point. By selecting this option you are recording that you have not asked the patient or the patient was unable to answer the share in question.
<ul style="list-style-type: none"> Consent not asked 	<ul style="list-style-type: none"> View shared record 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> This option will allow data to be shared in. By selecting this option you are recording that you have not asked the patient and the patient was unable to answer the share in question. You will be required to enter a reason at this point.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

• Consent not asked	• Do not view shared record	•	• This will prevent data from being shared in. By selecting this option you are recording that the patient has not been asked.
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Canceling the Record Sharing dialog

If a patient has share preferences recorded previously, clicking **Cancel** on the Record Sharing dialog will not update these preferences, i.e. the preferences will remain the same.

If you have not previously recorded a share setting, clicking **Cancel** on the Record Sharing dialog will record 'Not set - currently not shared' in the patient's record for both share in and share out preferences.

Viewing other care services that share the patient record

All care services that have explicitly or implicitly selected to share out can be viewed by clicking **Data Source** (located at the bottom of the Record Sharing dialog). This allows patients to see what information will be visible to this care service should they give consent to share in.

The Sharing Consents dialog below will launch when you click **Data Source**. The 'Sharing Out' section of the dialog displays those care services that have explicitly selected to share out.

The 'Sharing In' section will display those care services that can see the data recorded at your care service if you decide to share out, provided that that this care service is sharing out. If you have not selected share in for the patient, any care services displayed in the Sharing Consents dialog (except the care service you are logged onto) will display as 'Hidden: [Service type]'.

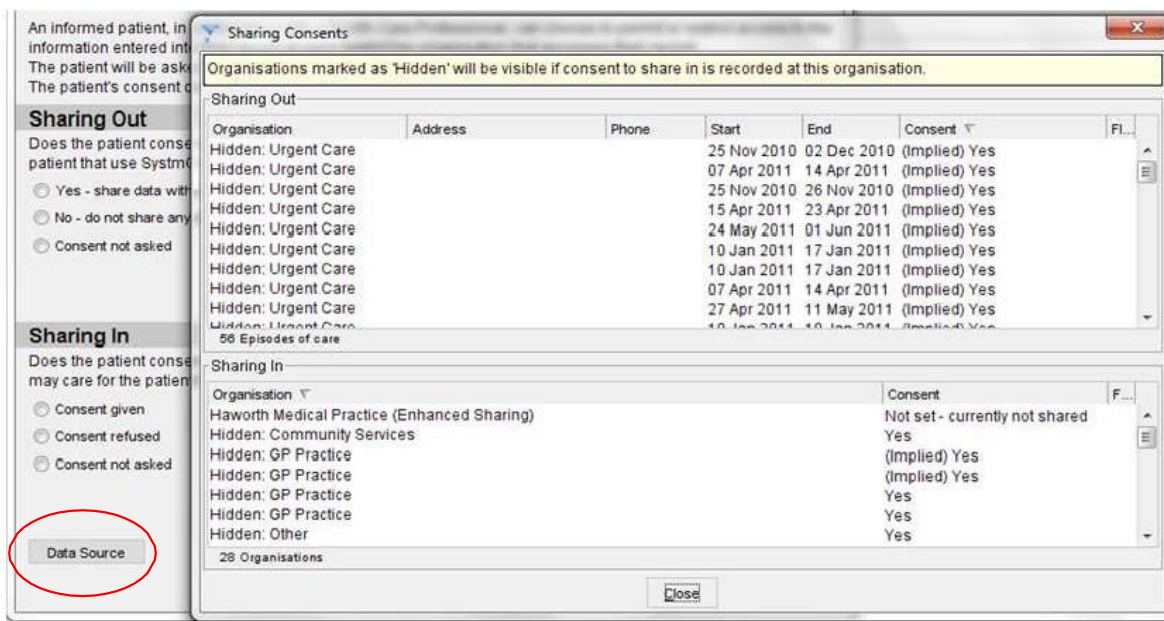



Figure 7: Sharing Consents Dialog

Note: The 'Sharing In' section will only display care services that are also sharing out.

Sharing options in the Tabbed Journal

The share settings on individual events can also be recorded separately. To amend the sharing options of an event in the Tabbed Journal:

1. Select 'Tabbed Journal' from the clinical tree.
2. Find and select the entry that you want to amend.
3. Click  at the top of the Tabbed Journal, this will display the following drop-down menu (see [Figure 6](#)):

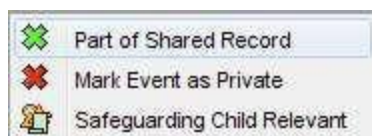


Figure 8: Record Sharing Options

4. Select whether you want the event to be part of the shared record, marked as private or safeguarding child relevant. A dialog will be displayed to ask you to confirm the sharing option you have selected.
5. Click **Ok** to confirm the sharing option you have selected for the event and return to the Tabbed Journal.
6. Save the patient record.

Part of shared record

Events marked as shareable will be visible to all organisations that care for the patient if the patient has consented to share out.

Private

Events marked as private in the Tabbed Journal will not be visible to any users outside your care service even if the patient has chosen to share out. However, all users at your care service will be able to see this data. The entry in the Tabbed Journal at other care services who have access to the patient record will be marked as completely private.



Figure 9: Private Event in the Tabbed Journal

It is not possible to share individual events from a record where dissent has been recorded for sharing out. If the patient record is not shared out at your care service then no part of the record can be seen by other care services (except for information that has been recorded by selecting 'Safeguarding Child Information' from the Clinical tree).

Safeguarding child relevant

Events marked as safeguarding child relevant will only be visible to staff with the 'Can view Safeguarding Child Relevant Events' access right. These entries will follow sharing rules. However, should you require any safeguarding child relevant information to be visible to anyone with the relevant access rights, regardless of a patient's sharing preferences; this must be recorded via the 'Safeguarding Child Information' node in the Clinical tree.

Note: Anything recorded via the 'Safeguarding Child Information' node is exempt from the sharing model. This information will be visible to any user with the relevant access rights, at any organisation caring for the patient.

However, safeguarding child relevant entries do follow sharing rules. For example, if a dissent to share out is in place then this information will not be visible to users at any other units regardless of whether the user has access to view safeguarding information.

If another unit has selected not to share out or has stopped sharing out, the journal entry will state: '*** Patient dissented to their record at another organisation being shared. Information recorded at the other organisation may previously have been visible ***'. This indicates that there is more information on the patient record than is visible to the user at that time.

Setting the organisation default for event visibility

It is possible to create a default setting so that all events will appear by default as either:

1. Normal (Part of the shared record)
2. Private (Not part of the shared record)
3. Safeguarding Child Relevant

Please see the [Organisation Preferences](#) section for more information.

Confidential notes

Confidential Notes functionality will continue to exist under eDSM. These are notes that can be added by a quick action button on the toolbar and will only ever be visible to a subset of staff as set up in the Organisation Preference.

Applying sharing preferences in bulk

It is possible to apply sharing preferences in bulk to a list of patients via a right click list action.

These preferences are applied via a right click action option on a list of patients e.g. the returned list of patients returned in a Clinical Report. To do this:

1. From a list of patients, highlight the patients you would like to apply preferences to and the right click to see the available menu options
2. Navigate to Actions on the menu > Update Record Sharing Preferences. You will then see the Record Sharing dialog in Figure 10 below.

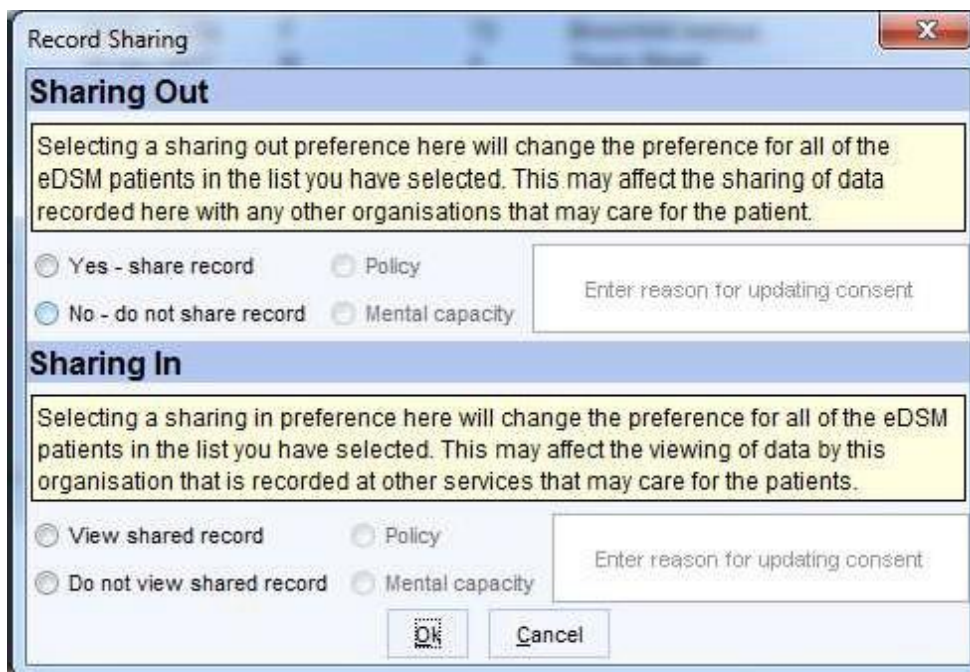


Figure 10. Record Sharing dialog when applying preferences in bulk

3. Complete the sharing preferences to be applied to the list of patients. You will then see the following warning which you must confirm in order to apply the preferences.

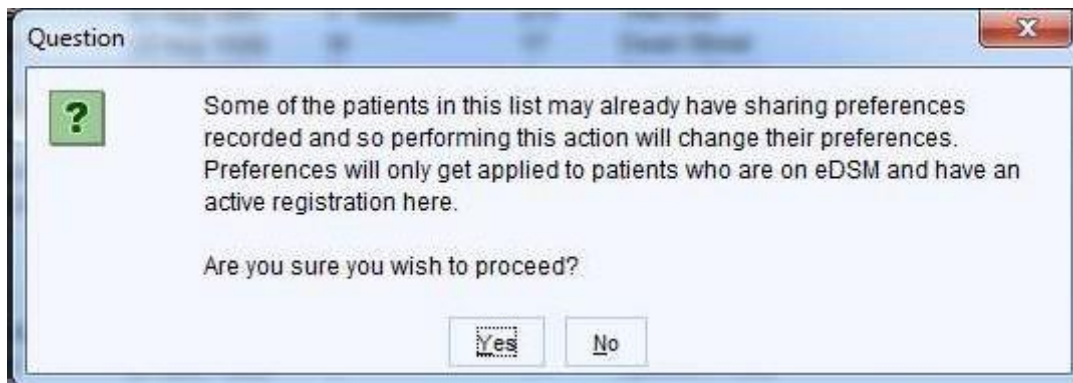


Figure 11. Warning before applying sharing preferences in bulk

4. An unassigned Bulk Shared Record Consent Update task will then be generated and sent to the Task screen which will contain details of the preferences applied in bulk, the reason these have been applied and which patients they have been applied to.

08 May 2014 HG		Bulk Shared Record Consent Update	Not Started		
07 May 2014	Miss Polly Jones	Patient Accessed	Not Started	<input type="checkbox"/>	
07 May 2014	Mr Conor Vidic	Patient Accessed	Not Started	<input type="checkbox"/>	
03 May 2014		Patient Access Summary	Not Started	<input type="checkbox"/>	
03 May 2014		Rota Auto-Apply Results	Not Started	<input type="checkbox"/>	
02 May 2014		Patient Access Summary	Not Started	<input type="checkbox"/>	
02 May 2014	Mr Mark Pearce	Patient Accessed	Not Started	<input type="checkbox"/>	
01 May 2014		Rota Auto-Apply Results	Not Started	<input type="checkbox"/>	
01 May 2014		Rota Auto-Apply Results	Not Started	<input type="checkbox"/>	
01 May 2014		Registration/IOS to Process	Not Started	<input type="checkbox"/>	
01 May 2014	Mr Cooper Barnes	Patient Accessed	Not Started	<input type="checkbox"/>	
30 Apr 2014		Rota Auto-Apply Results	Not Started	<input type="checkbox"/>	
29 Apr 2014		Patient Access Summary	Not Started	<input type="checkbox"/>	
29 Apr 2014 KR	Miss Pnny Garner	Subiect Access Request	Not Started	<input type="checkbox"/>	
1031 Tasks (1 Selected)					
<p>Thu 08 May 13:40 - Miss H Griff ('Other' Community Health Service) The sharing out consent has been changed in bulk to (Implied) Yes The reason for this change is: Under 16</p> <p>The sharing in consent has been changed in bulk to (Implied) Yes The reason for this change is: Under 16</p> <p>The following patients have been affected:</p>					

Figure 12. Bulk Shared Record Consent Update task

CRS sharing mismatch

If a patient's CRS flag has been set to Explicit Dissent but the SystemOne share settings have been set to share in and/or share out the Sharing Mismatch dialog will appear when you retrieve the record.

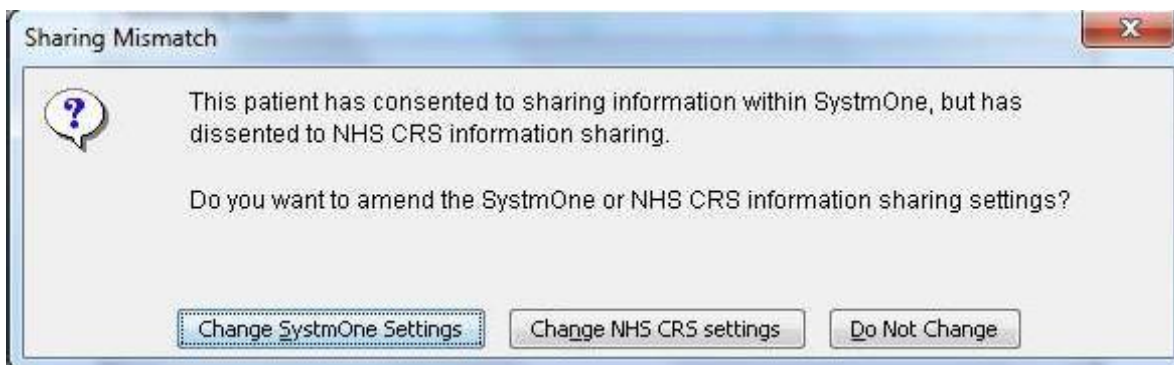


Figure 13: Sharing Mismatch Dialog

This dialog will inform you that a mismatch has occurred and offer three options to resolve the issue:

- **Change SystemOne Settings** – The Record Sharing dialog is displayed. From this dialog, you can amend the SystemOne share settings or click **Cancel** to maintain the current settings.
- **Change NHS CRS Settings** – The Edit Spine Consent dialog is displayed. From this dialog you can amend the CRS data sharing settings or click **Cancel** to maintain the current settings.



Figure 14: Edit Spine Consent Dialog

- **Do Not Change** – All settings will remain as they are. The CRS Flag Override dialog is displayed. On this dialog you must select a reason for maintaining both the SystemOne and the CRS share settings, rather than resolving the conflict. The CRS Flag Override dialog is displayed below:

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

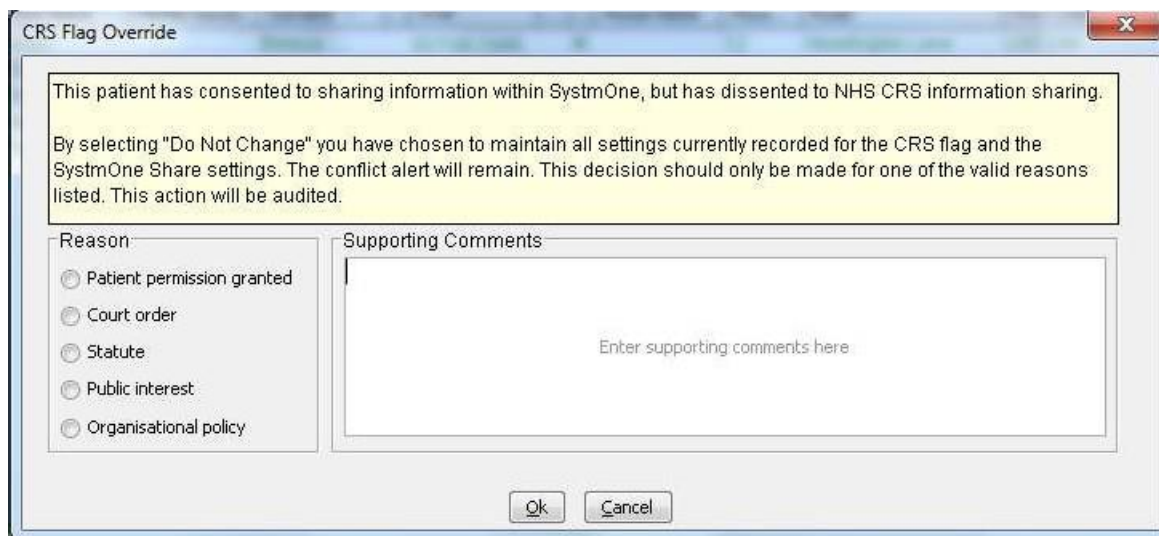


Figure 15: CRS Flag Override

When selecting a reason on the CRS Flag Override dialog you must select a reason for maintaining the current settings and add some supporting comments to explain this.

Note: If you select **Organisational policy** you do not need to add any comments. This action is audited. If you click **Cancel** you will be returned to the Sharing Mismatch dialog.

See the section on [Hardcoded Reports and Audits](#) for further information on how to access the audit that shows which staff members have used this functionality.

If you create a mismatch when recording SystemOne share settings or recording the CRS flag, you will be presented with the dialog below.

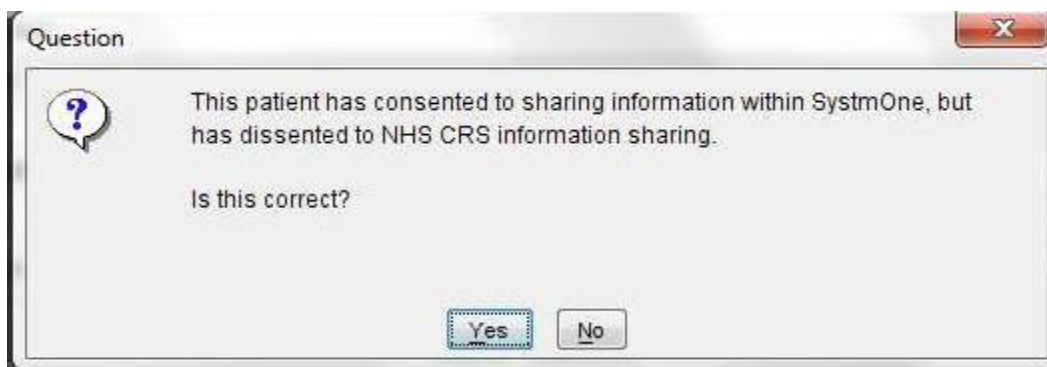


Figure 16: Question Dialog

To continue, click one of the following:

- **Yes** – This will allow you to continue without making any changes to either the SystemOne or CRS share settings
- **No** – This will take you back to the Record Sharing dialog or the Edit Spine Consent dialog, depending on which you were amending.

Please refer to the section on [Hardcoded Reports and Audits](#) for further information about auditing CRS clashes.

Electronic referrals within SystemOne

Electronic referrals can be sent to care services regardless of a patient's share out consent setting at the service sending the referral. However, the process of sending an electronic referral differs depending on whether dissent or consent has been recorded.

To allow your unit to receive electronic referrals, first you must tick the 'Allow Electronic Referrals to be sent to this organisation' tick box in Organisation Preferences > Clinical Policy > Referrals In (see Figure 20).

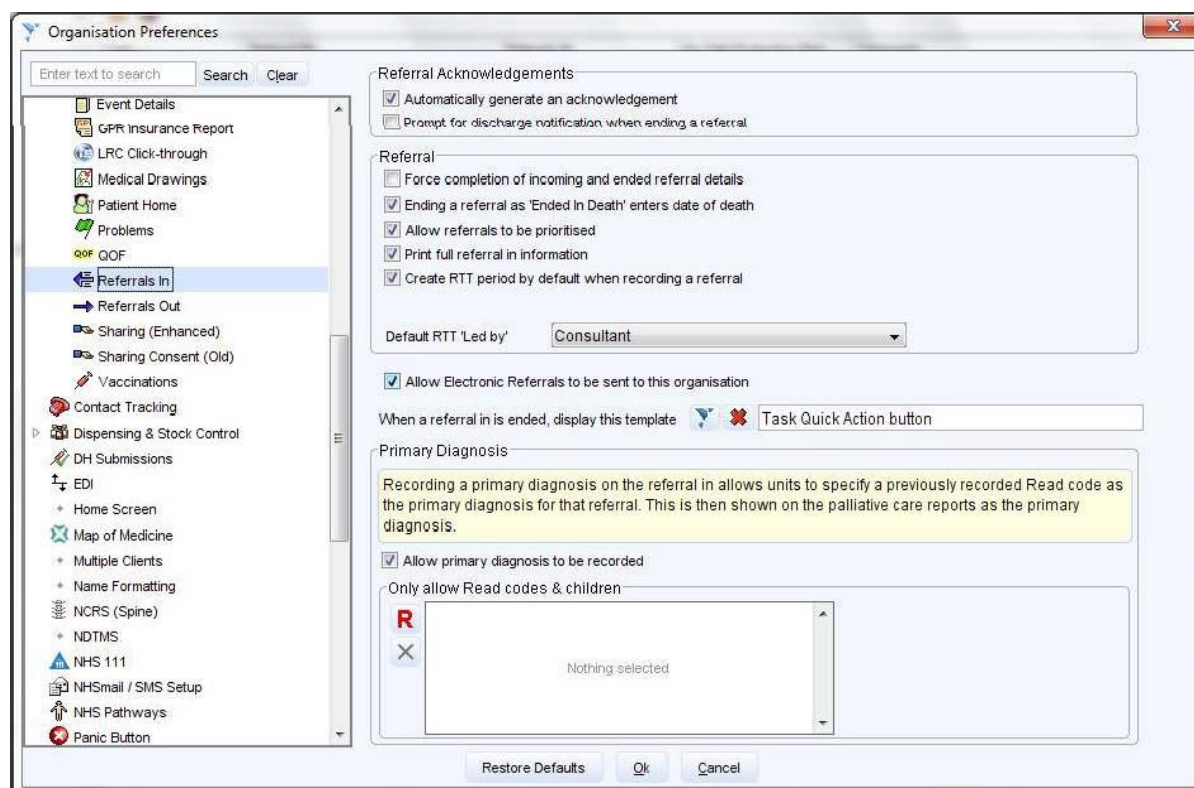


Figure 17: Organisation Preference to allow the service to receive electronic referrals

Patients who consent to share out

To create an electronic referral for a patient that consents to share out:

1. Retrieve the relevant patient record.
2. Right-click on the 'Referrals' node in the Clinical tree and select **New Electronic Referral**.
3. Select the receiving care service from the Select Organisation or Person dialog and click **Ok**.
4. Complete the New Electronic Referral dialog and click **Ok**.
- 5.

Note: If you have set the relevant organisation preference, the Record Sharing dialog will now be displayed (see the section on [Organisation Preferences](#) for further details). This dialog allows you to record the share in settings for the care service receiving the referral (if the patient does not currently have any sharing consents set up). Click **Data Source** to display the list of services where the patient has given consent to share in (this is dependent on whether the patient has given explicit consent to share this information out).

The screenshot below shows the Record Sharing dialog where you can record the patient's preference to share data in:

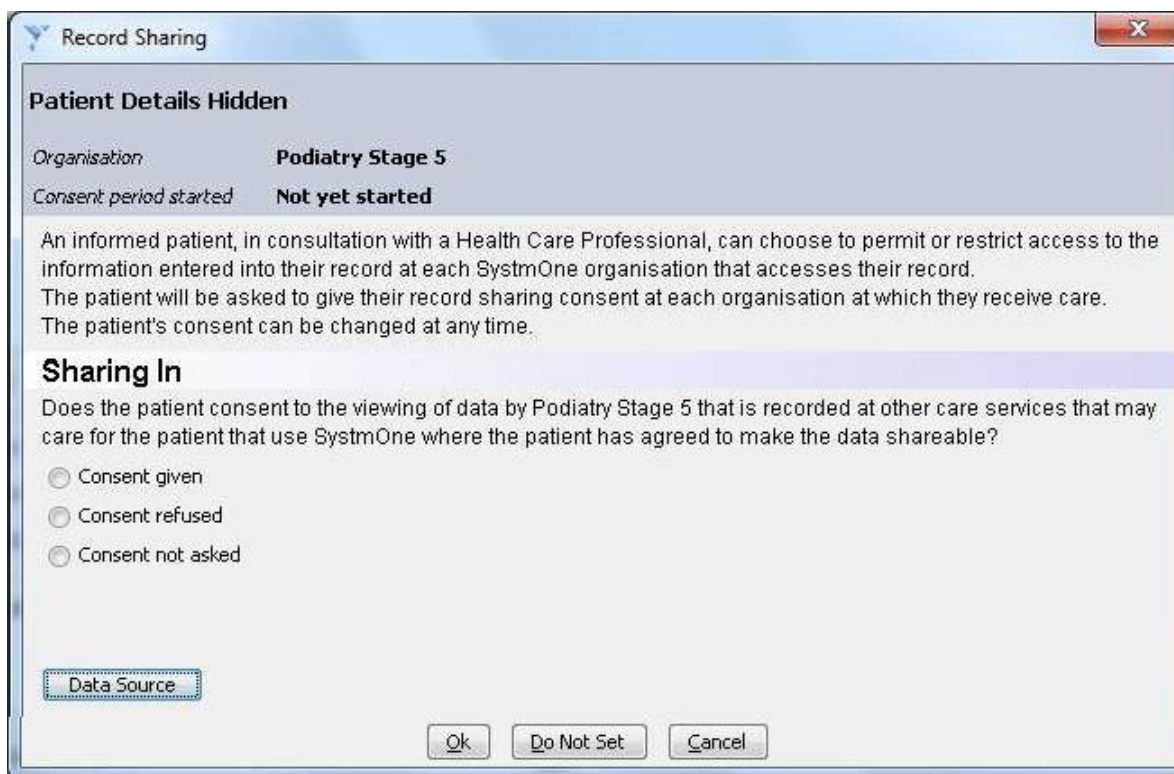


Figure 1 8 : Record Sharing Dialog

There are three options on this dialog to allow you to record consent and a button for **Do Not Set**. The options and their outcomes are explained below:

1. **Consent given** – This option will send the referral.
2. **Consent refused** – This option will display a dialog when you click **Ok**. The dialog will show what data the service receiving the referral will be able to see and will confirm whether you want to continue to send the referral (see Figure 19). Select one of the following:
 - **Yes** – To send the referral
 - **No** – To return to the New Electronic Referral dialog
3. **Consent not asked** – To choose to share data without the patient's consent. You will need to record a reason why you are sharing data without explicit patient consent (the patient's share in consent will be set to use implied consent by default).

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

Below shows the dialog that is displayed when you record that consent has been refused by the patient:

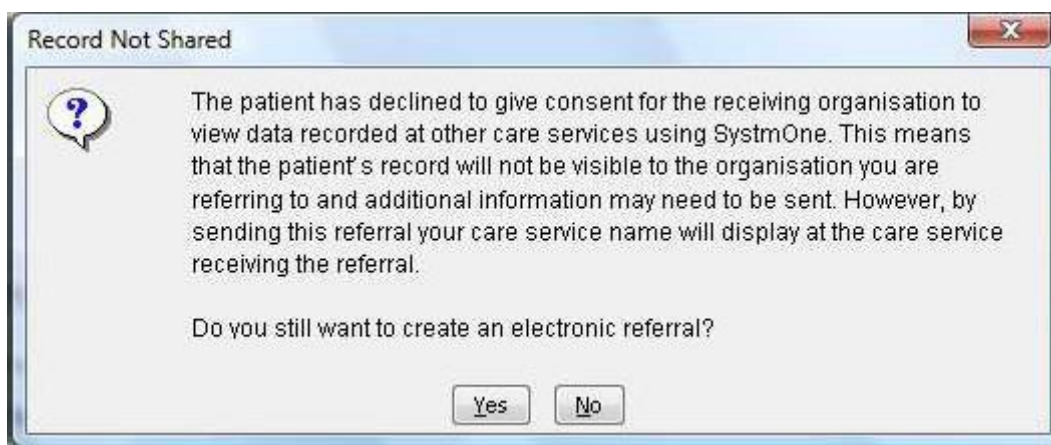


Figure 19: Record Not Shared Dialog

If you have chosen to send the referral at this point, an 'Electronic Referral Received' task will be sent to the receiving service. This task will display your name, your service, the patient's name, NHS Number and date of birth.

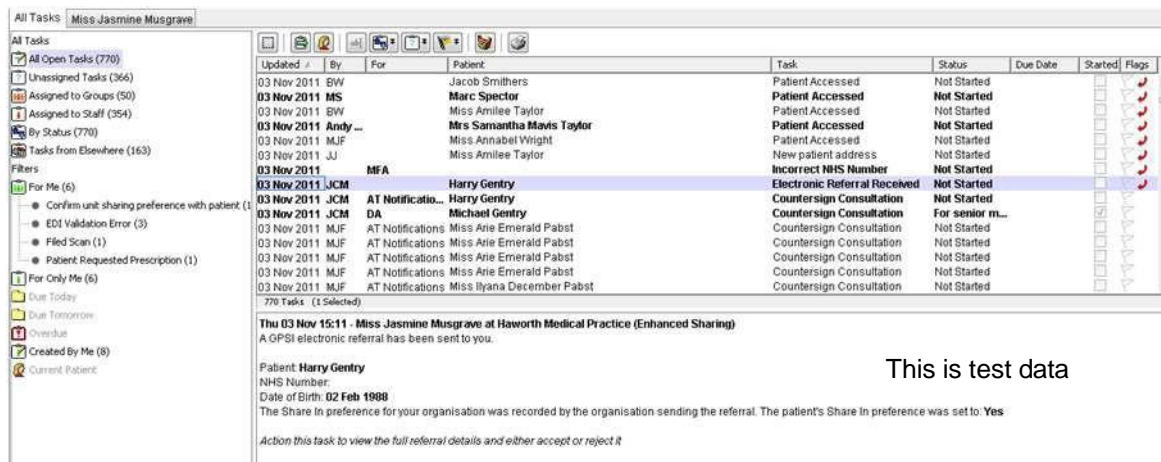


Figure 20: Electronic Referral Received Task

Patients who do not consent to share out

To send an electronic referral for a patient that has dissented to share out:

1. Retrieve the relevant patient record.
 1. Right-click on 'Referrals' in the Clinical tree and select **New Electronic Referral**. A dialog will be displayed asking you to confirm whether you want to proceed as the record will not be visible to the organisation you are referring them to.
 2. Click one of the following:
 - **Yes** - If you want to proceed
 - **No** – If you want to return to the patient record

Note: You will not be able to send electronic referrals to closed care services, for example sexual health unit.

If your role does not allow you to record a patient's share preference (for example administrators), you can select **Do Not Set**. This will allow you to send the referral without specifying the receiving unit's share in preference.

If a care service sends an electronic referral and records the share in preference for that unit, this will be recorded and displayed in the task sent to the receiving care service. The task will contain the following information:

'The share in preference for your organisation was recorded by the organisation sending the referral. The patient's share in preference was set to: [preference]'

This will display the sharing preference that the organisation sending the referral has set (either **Yes** or **No** for explicit settings or **Yes (Implied)** or **No (Implied)**).

Reminders

The ability to record reminders of different levels of priority remains in eDSM. The sharing preferences that the patient has recorded will determine who these reminders will be visible to:

Low priority reminders:

- are only visible to the user who created the reminder on retrieval of the patient record.
- are displayed on the Reminders view for all services that care for the patient, provided the patient has a Share Out recorded at the service who recorded the reminder, and is sharing in at each of the other services that care for them.

Normal priority reminders:

- are displayed on the Reminders view and on retrieval of the patient record to all users at your service.
- are displayed on the Reminders view for all services that care for the patient, provided the patient has a Share Out recorded at the service who recorded the reminder, and is sharing in at each of the other services that care for them.

High priority reminders:

- are displayed on the Reminders view and on retrieval of the patient record to all users at your service.
- are displayed on the Reminders view and on retrieval of the patient record to users at other services that care for the patient, provided the patient has a Share Out recorded at the service who recorded the reminder, and is sharing in at each of the other services that care for them.
- are not displayed on retrieval to users at other caring services if dissent to Share Out is recorded at the service who recorded the reminder, or if the services who did not record the reminder do not have a Share In recorded.

Tasks

By default, task functionality will follow the eDSM sharing rules. It will only be possible to send a task to another service if the sending and/or receiving service does not have an explicit dissent set for the patient for either Share In or Share Out. However, if a service un-ticks the Organisation Preference 'Do not allow tasks to be sent from or to this unit if the patient has not consented to sharing' (see Figure 24) then tasks can be sent for patients who have an Implied No or Not set – currently not sharing for share in or share out on their record.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

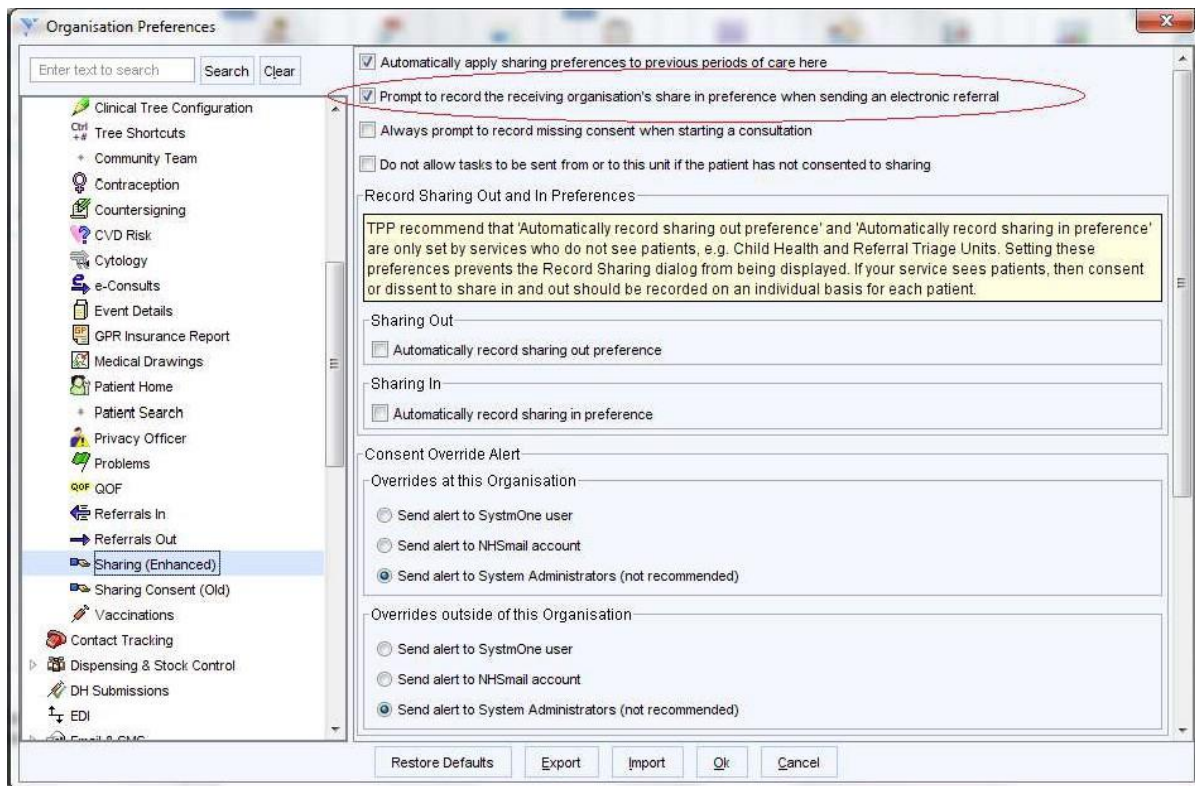


Figure 21. Task preference in Organisation Preferences

Clinical reporting

Clinical reports can be created locally to report on the following:

- a patient's share preferences
- which sharing model a patient is currently using

Reporting on sharing preferences

To report on current share preferences:

1. Select Reporting>Clinical Reporting from the Main Menu.
2. Click New.
3. Select 'Record Sharing' from the reporting options tree to view the available sharing reporting options.

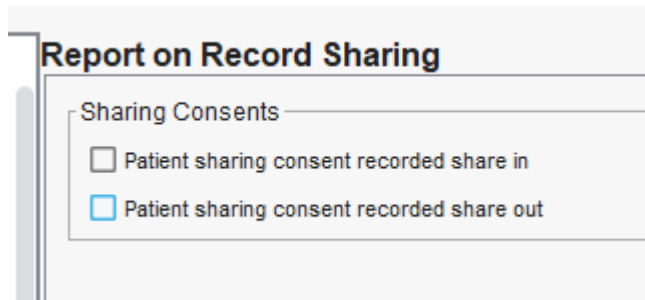


Figure 22: Record Sharing Options in Clinical Reporting

4. Select a sharing model to report on:
5. Specify whether you want to report on share in or share out consents. You will be given the option to select a consent type:
 - **Yes (Explicit)** – This will return patients who have given consent to the share type selected
 - **Yes (Implicit)** – This will return patients with implied consent to the share type selected
 - **No (Explicit)** – This will return patients who have given explicit dissent to the share type selected
 - **No (Implicit)** - This will return patients with implied dissent to the share type selected.
 - **Not recorded** – This will return patients that have not yet had a sharing preference recorded for the share type selected

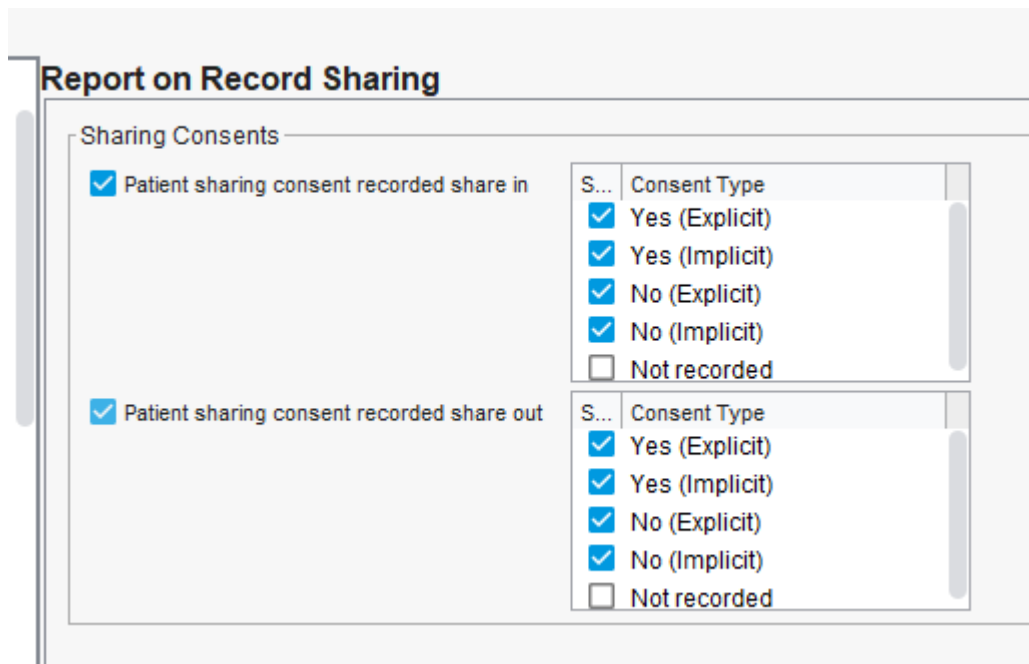


Figure 23: Clinical Reporting - Patient Sharing Consent Recorded Share Out Options

6. Give your report a name and click **Ok**.

Breaking down reports on sharing

Once a report has been built and run, you can break down the report. The table below explains the breakdown options available:

Breakdown option	Description
<ul style="list-style-type: none"> Consent in not asked reason 	<ul style="list-style-type: none"> This will display the comment recorded when consent was not asked but the clinician recorded consent to share in.
<ul style="list-style-type: none"> Consent in not asked type 	<ul style="list-style-type: none"> This will display either Mental Capacity or Policy depending on the information that was recorded when consent was not asked but the clinician opted to share in.
<ul style="list-style-type: none"> Consent out not asked reason 	<ul style="list-style-type: none"> This will display the comment recorded to explain why consent was not asked but the clinician opted to share out.
<ul style="list-style-type: none"> Consent out not asked type 	<ul style="list-style-type: none"> This will display either Mental Capacity or Policy depending on information that was recorded when consent was not asked but the clinician opted to share out.
<ul style="list-style-type: none"> Patient sharing model 	<ul style="list-style-type: none"> This will display which sharing model a patient is currently using.
<ul style="list-style-type: none"> Record sharing consent share in 	<ul style="list-style-type: none"> This will display the share settings that have been recorded for share in consents (i.e. consent or dissent).
<ul style="list-style-type: none"> Record sharing consent share out 	<ul style="list-style-type: none"> This will display the share settings that have been recorded for share out consents.

Hardcoded reports and audits

A number of hardcoded reports and audits are available in SystmOne that can be used to gain information about Enhanced Sharing patients.

SystmOne/Spine consent conflicts

You can view when a clash has taken place between the SystmOne share settings and the CRS flag share settings using the SystmOne/Spine Consent Conflicts audit.

To use the audit for SystmOne/Spine Consent Conflicts:

- Select Audit>Patient>SystmOne/Spine Consent Conflicts from the Main Menu.
- Select the date parameters you want to run the audit for and click Refresh. The report will display the patient's name, the time the clash occurred, the staff member who encountered the clash, the reason and supporting comments

Patient consent report

This report is only available at Trust Reporting units. In order to run this report you must contact TPP to have the access right for PCT reporting enabled.

This report is intended to help the responsible officer for each PCT identify patients that have visited multiple care services within a specified time frame but have not chosen to share data out. This report allows you to identify which share settings have been recorded at the care services in your trust.

To use the Patient Consent report:

1. Select Reporting>Miscellaneous>Patient Consent Report from the Main Menu.
2. Specify the date range that share preferences were recorded.
3. Specify an age range.
4. Select Exclude registrations with full consent, if applicable. This option allows you to exclude patients that have recorded full consent to share.
5. Select Only show patients with multiple registrations, if applicable. This option allows you to identify patients that have multiple registrations.
6. Click Run Report. Any rows highlighted in red show patients that are not sharing in or sharing out. Rows highlighted in green indicate patients that do not have a share preference recorded.

NHS Number	Patient Identifier	Age	Org Name	Org Id	Org Type	Consent ...	Consent In	Registrations
9437711380	1171f000	15	The Real Surgery	B83023	General Practice	No	Yes	1
4380701255	045a0000	16	The Real Surgery	B83023	General Practice	Not Recorded	Not Recorded	1
	cc201100	11	The Real Surgery	B83023	General Practice	Not Recorded	Not Recorded	1
	a92de000	11	The Real Surgery	B83023	General Practice	Not Recorded	Not Recorded	1
	c6ec71e0	11	TPP NEAS Version PCC 2		Out of Hours PCC	Yes	Not Recorded	1
8240110428	6b1f0100	18	MIG General Practice	TPPGP1	General Practice	Yes	Yes	1
	a92de000	11	TPP NEAS Version PCC 1	TNVPCC1	Out of Hours PCC	Yes	Yes	1
	57031100	11	RTT Community District Nurse	RTT001	District Nurse Practice	Yes	Yes	1
4951771594	bf1f0100	0	The Real Surgery	B83023	General Practice	Yes	Yes	1
9437710929	e832f000	2	Ilkley GP Practice	M10101	General Practice	Yes	Yes	1

Figure 24: Patient Consent Report

Note: NHS numbers will only be displayed if you have the appropriate access right ('View NHS Number & Post Code - can see NHS number & full post code from Clinical Reporting'). This access must be requested from TPP directly with written permission from the Caldicott Guardian for your area.

Out of hours

Each visit to an out of hours (OOH) service is classed as an *episode of care*. This means that the share settings will be specific to each episode regardless of whether the patient returns to the same care service multiples times.

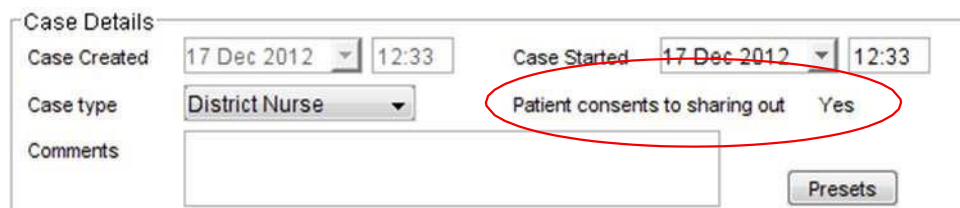
Note: If a patient returns within seven days, you will be presented with the share settings dialog and this will be considered a new episode of care.

Recording share settings at an out of hours organisation

To record share settings at an out of hours organisation:

1. Begin registering a patient using your usual process. At the point of completing the registration for the new episode of care, you will be presented with the Record Sharing dialog.
2. Select the appropriate sharing options:
 - Share in options – These options work in the same way as other SystemOne modules. Please see the [Record Sharing Dialog](#) section for further information.
 - Share out options – The OOH Case Details dialog will show whether the patient has a share out recorded. The patient's share out settings will determine whether case details are sent to the GP

Example: If you have selected **Yes - share data with other organisations**, the 'Patient consents to sharing out' section on the OOH Case Details dialog will display **Yes**. When the case is closed, details will be sent automatically to the patient's registered GP.



The screenshot shows a 'Case Details' dialog box. It contains the following fields: 'Case Created' (17 Dec 2012, 12:33), 'Case Started' (17 Dec 2012, 12:33), 'Case type' (District Nurse), and 'Comments'. A red oval highlights the 'Patient consents to sharing out' field, which is set to 'Yes'. There is also a 'Presets' button at the bottom right.

Figure 25: OOH Case Dialog, Consent Set to Share Out

Note: If you click **Cancel** on the Record Sharing dialog, OOH notifications will follow the same rules as if you have selected **No - do not share any data recorded here**.

These instructions are correct at the date of writing. For further assistance, consult the SystemOne Online Help.

If the patient has a share out recorded, the Case Closure Details dialog will display the recipients that will receive the OOH notification (see [Figure 31](#)).

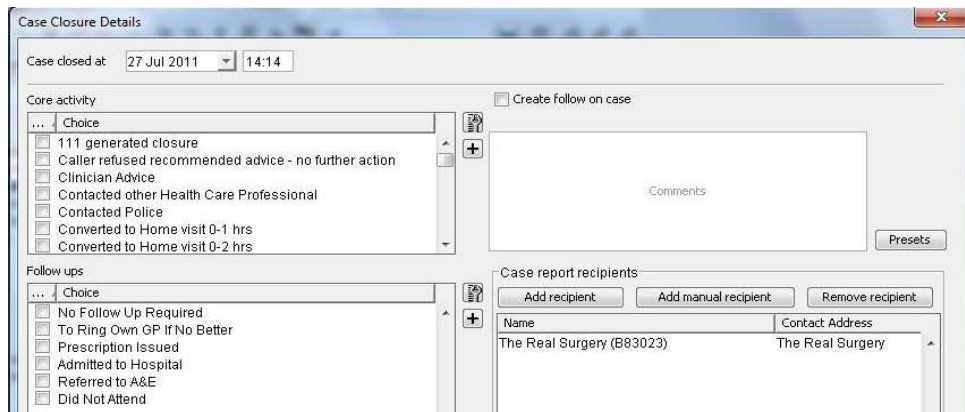


Figure 26: Case Closure Details Dialog

If the patient has dissented to share out, you will be warned that the case will not be sent to the patient's GP when you click **Ok** on the OOH Case Details dialog.

The Case Closure Details dialog will also display the message that the case will not be sent to the GP.

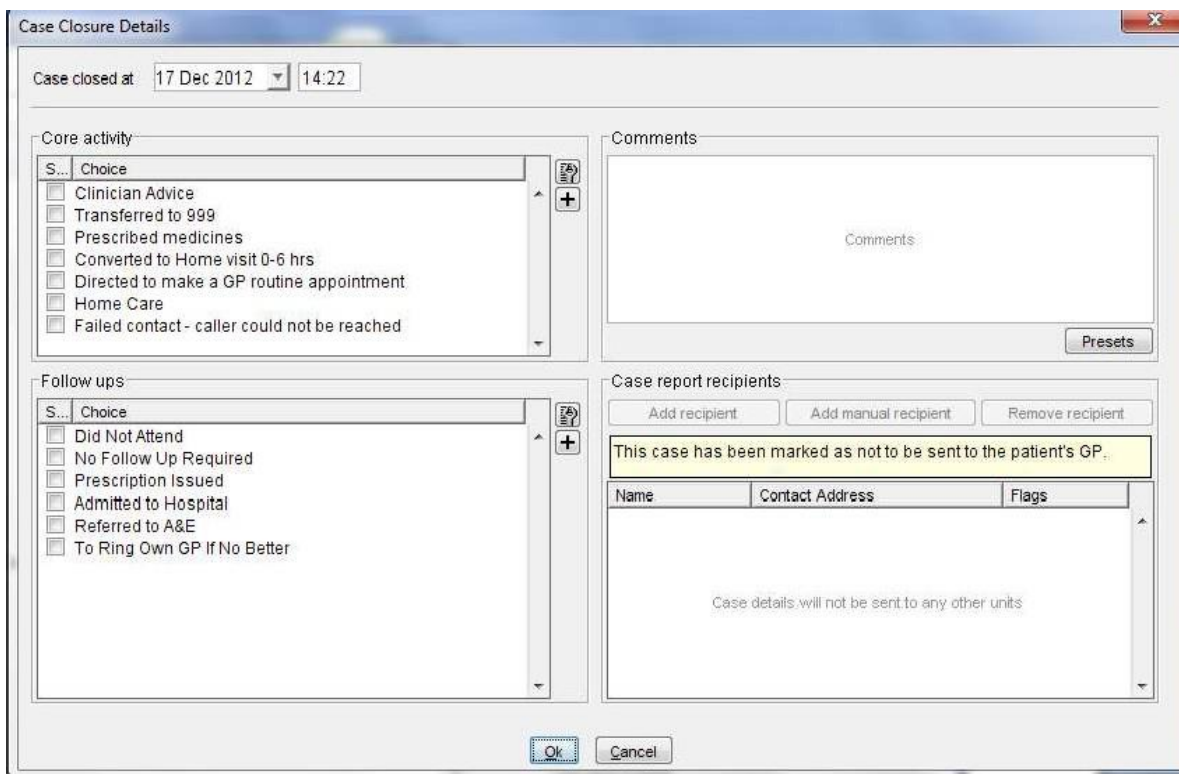



Figure 27: Case Closure Details Dialog, Dissent to Share Out


To change patient share settings at any point during the episode of care:

1. Retrieve the relevant patient record.
2. Select 'Record Sharing' from the Administrative tree.
3. Click  to change the patient's record sharing consent.
4. Select the appropriate sharing settings and click **Ok**.
5. Save the record.
6. Right-click on the patient on the Open Cases Overview and select **Amend Details**. You will see that the share settings have now been updated.
7. Click **Ok**.


Accident and emergency

Sharing functionality at A&E organisations will work in the same way as out of hours organisations.

However, if you initially recorded a patient's share out status to be **Yes - share data with other organisations**, but the patient changes their mind you must:

1. Retrieve the relevant patient record.
2. Select 'Record Sharing' from the Administrative tree.
3. Click  to change the patient's sharing consent. You will be asked whether you want to mark in error any discharge letters that have not yet been sent.
4. Do one of the following:
 - Select **Yes** – This will mark in error any discharge letters that have not yet been sent
 - Select **No** – This will not mark any discharge letters in error

If the patient has initially asked to record **No - do not share any data recorded here** but then changes their mind you must:

1. Retrieve the relevant patient record.
2. Select 'Record Sharing' from the Administrative tree.
3. Click  to change the patient's record sharing consent. This will create a discharge letter for the patient that will be sent when you close the case in the usual way.

Child health, school nurse and district nurse care services

Details of all vaccinations will be implicitly shared to child health services, health visitors, school nurses, community services and district nurses (including out of hours district nurses) and GPs unless the patient has given explicit dissent at the service where the vaccination is recorded.

To confirm, if a unit records a vaccination and have either an implicit dissent recorded or no sharing preferences have yet been set for the patient, all of the above unit types will have visibility of the vaccination.

However, the sharing of vaccinations between GP and child health services will always occur regardless of share preferences.

Note: These details will appear in the patient record, showing the name of the staff member and care service that recorded the data.