GP Practice Checklist

The following steps are to help your practice from submission of the Your Care Connected Data Sharing Agreement (DSA) to Go-Live.

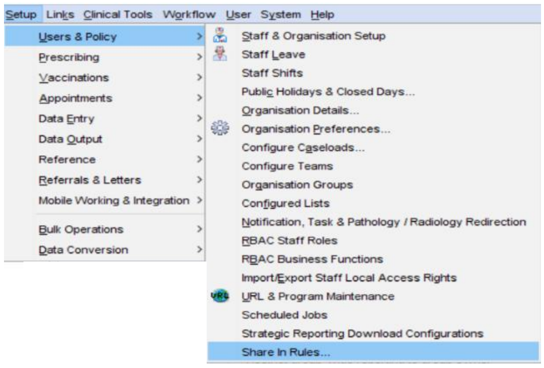
❑	**Step 1.**	Data Sharing Agreement (DSA) signed and sent to **infoMidlandsYourCareConnected@nhs.net** with ODS/NACS code in subject field e.g. **MXXXXX DSA.**
❑	**Step 2.**	Patient leaflets and posters will be delivered to your practice, please display these to help inform patients. Please update practice website to reference YCC.
❑	**Step 3.**	On receipt of Mail Out confirmation from YCC, prepare to deal with patient queries and collate patient opt-outs over the 4 week period.
❑	**Step 4.**	Week 5, process and record Opt-Outs received for each patient using the instructions attached.
❑	**Step 5.**	Week 5, process consent sharing status in SystmOne for patients who have not opted out using the instructions attached.
❑	**Step 6.**	Activate Your Care Connected "**MIG Integration**" in SystmOne using the instructions attached.
❑	**Step 7.**	Go Live confirmed with GP Practice.
❑	**Step 8.**	Practice to ensure YCC information is included in new patient registration pack.
❑	**Step 9.**	Process opt-outs for new patients as and when received.

Step 4: Recording patient opt-out in SystmOne

Check organisation "Share In Rules"

If your practice allows sharing with other organisations such as Marie Curie or Community, you will need to temporarily change these rules to process the opt-outs, please note this is an Administrator setting.

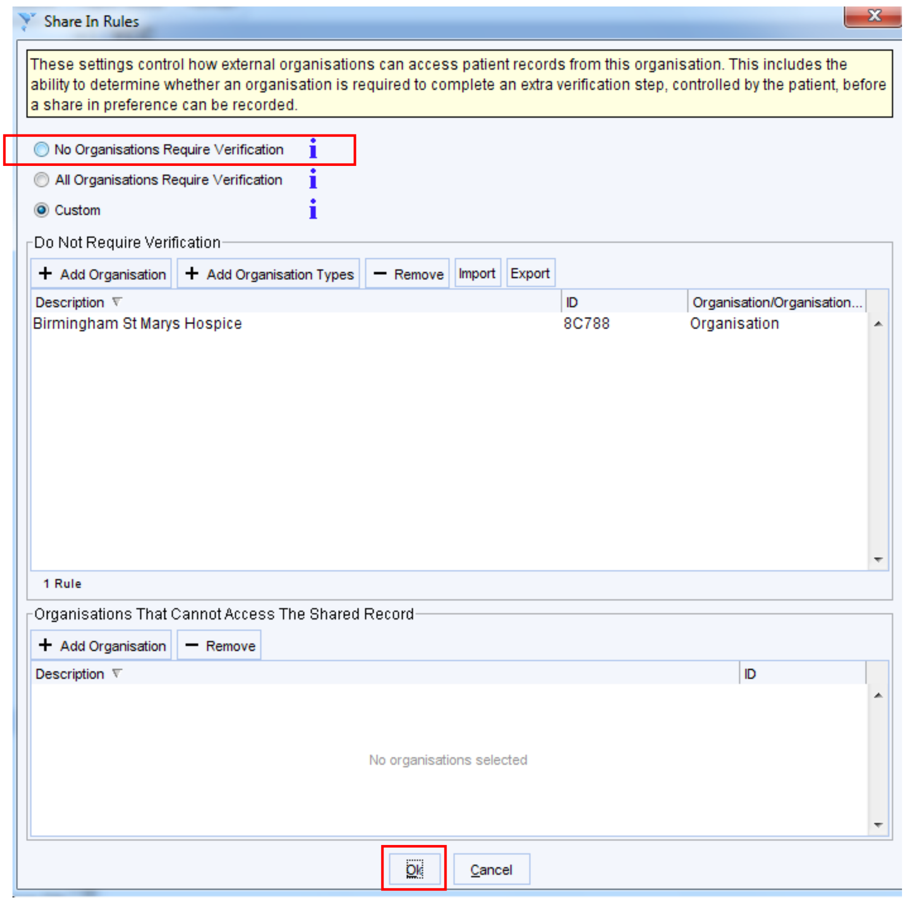
1. From the menu bar, select:
   Setup → Users & Policy → Share In Rules



You will be presented with the screen below. If the "Custom" option is selected and there are organisations listed in the top box (as shown below) please take a screen shot - as you will need to change it back when you've finished.

Please note that "**Custom**" is the CCG recommended setting that practices should revert to after completing all steps to process opts out and batch changing consent status. "**Custom**" provides an additional layer of sharing security within SystmOne.

2. Select: **No Organisations Require Verification** and select **OK.**



Your Care Connected

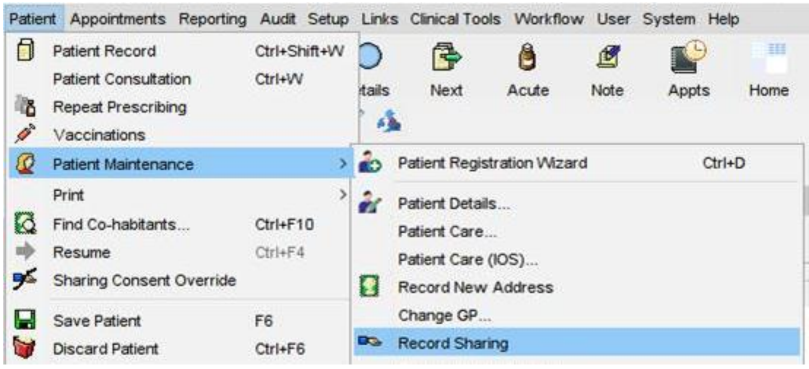
<u>Opting out a patient – recording sharing out preferences</u>

A patient can choose to opt out of **all** local sharing out by returning a completed opt-out form (either by post or by hand). The practice may decide to scan in a copy of the signed Opt Out form into the patient record.

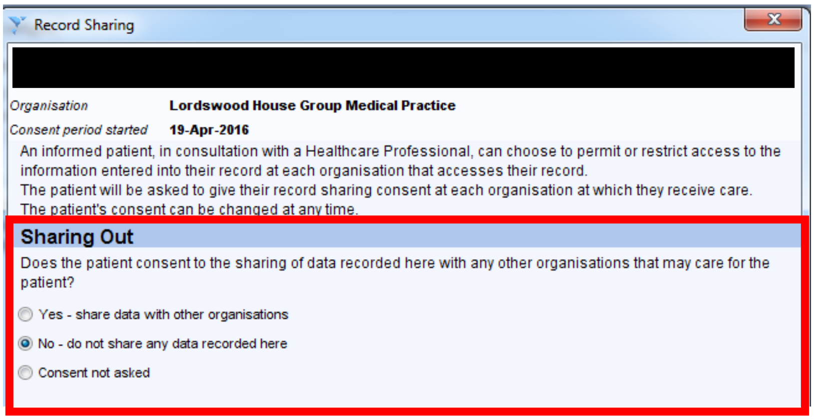
ACTION: Practices need to follow these steps to opt out each patient.

1. In SystmOne, find the patient and go into the record.

From the menu bar select **Patient, Patient Maintenance** and **Record Sharing.**



2. In the **Sharing Out** section, select **No – do not share any data recorded here** and click **OK**.



3. Add the following read code in patient record and save the record:

> **XaKRw** - Refused consent for upload to local shared electronic record.

<u>Opting a patient back in</u>

1. Find the patient and go into the record. From the menu bar select **Patient, Patient Maintenance** and **Record Sharing.**

2. **I**n the Sharing Out section, select **Yes – share data with other organisations** and click **OK.**

3. In addition, add following read code in patient record and save the record:

> **XaKRv** - Consent given for upload to local shared electronic record.

Step 5: Bulk consent change non-opted out patients to share record

There are a few prerequisite checks prior to running the bulk consent change for non-opted patients at your practice to share their record. Running reports can show how your practice has recorded the **Share Out** consent status for each patient.

There are 5 possible settings of **Share Out** consent status

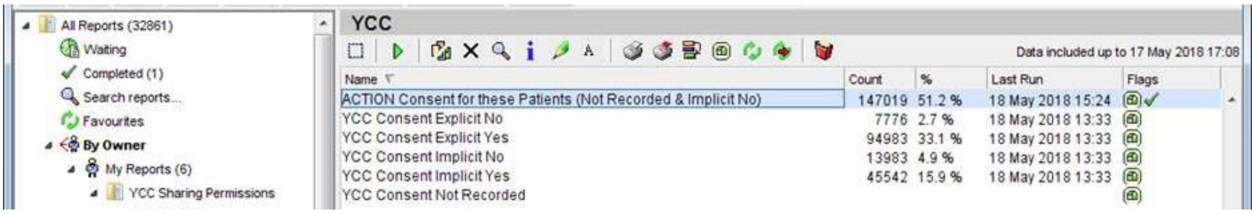
a) Explicit Yes — *Patient has told the practice either verbally or in writing they want to share their record.*
b) Explicit No — *Patient has told the practice either verbally or in writing they do not want to share their record.*
c) Implicit Yes — *Practice has assumed patient wants to share their record as they have not expressed to opt out.*
d) Implicit No — *Practice has assumed patient does not want to share their record.*
e) Not Recorded — *Sharing consent is not recorded for the patient.*

In step 4, patients who have opted out have been set at "Explicit No".

Patients with "Explicit Yes" and "Implicit Yes" are correctly configured to share the GP record via YCC.

ACTION: For patients with "**Implicit No**" and "**Not recorded**" these are the two categories of consent that need change in bulk. To identify and action these patients, please:

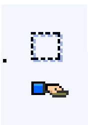
1. Run the searches from **"YCC Sharing Permissions"** as shown below

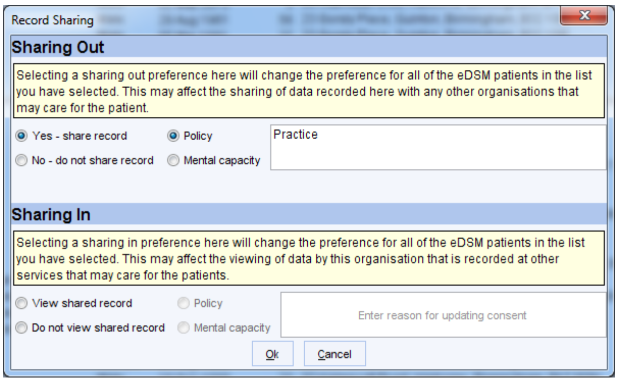


2. View the patients from **"ACTION Consent for these patients (Not Recorded & Implicit No)"** by right clicking search and selecting breakdown.

The result breakdown will show 250 patients per page, and EACH page will need to be bulk changed.

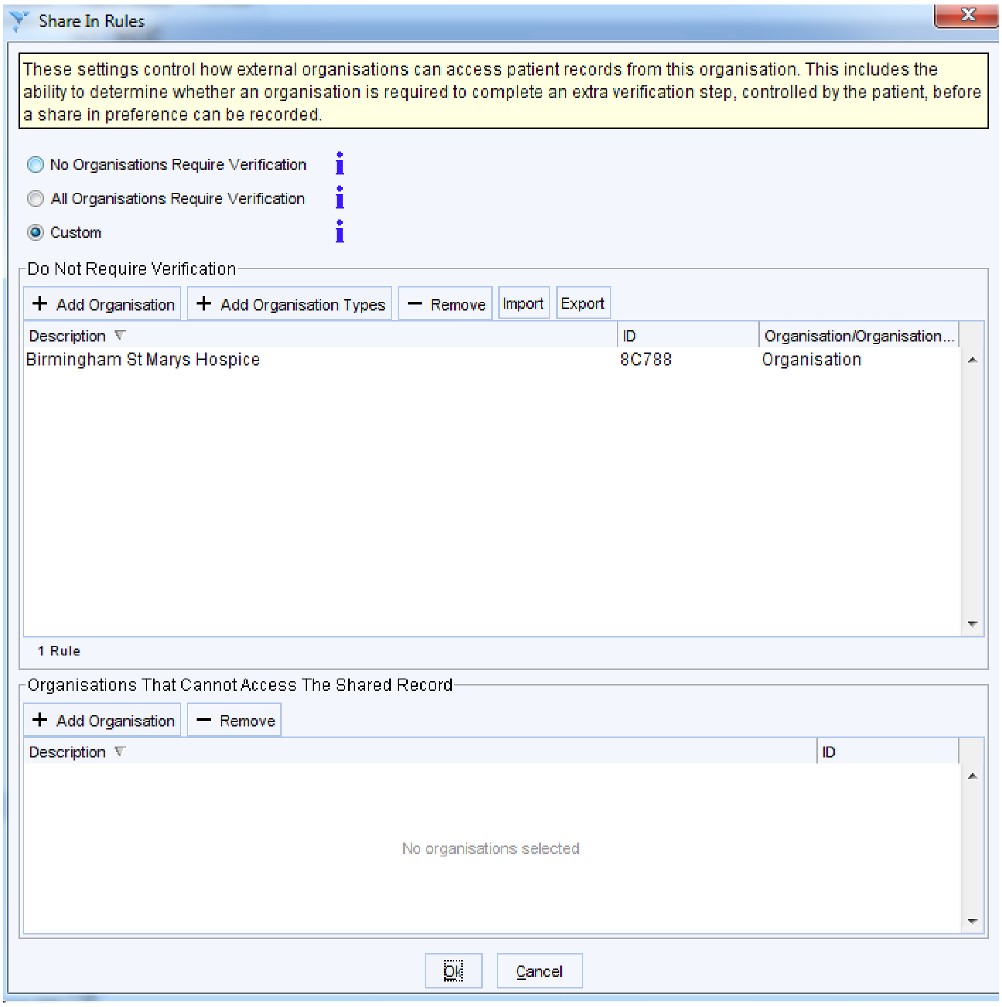
3. Bulk change each page:
   a) Highlight the all patients in the page.
   b) Click the Record Sharing button.
   c) Select **Yes – share record**.
   d) Select **Policy**
   e) Type **Practice** into the text box.
   f) Select **OK**
   g) Apply the same steps to **all pages**.





4. Check the changes have been applied by running the report after a couple of days. The patient count should be **Zero**. If patient count is not zero, break down the results by patient and repeat the above steps and repeat the search the following morning.

5. If the search returns a patient count of **Zero**, go back and change the Organisation **Share In** settings. From the menu bar select: **Setup → Users & Policy → Share In Rules →** select **Custom** (as recommended by the CCG to provide a layer of sharing security within SystmOne and practices can specifically search and add any organisation they are sharing with such as a hospice or community).



The practice will need to decide which organisations can **Share In** to the GP record to control access. The practice may also wish to follow similar steps to bulk change **Share In** consent settings but these are not relevant and do not impact the YCC programme. For further information, please refer to the TPP SystmOne guidance: “New Sharing Controls in SystmOne”.

Step 6: Activate Your Care Connected in SystmOne

1. From the menu bar select
Setup ➝ Users & Policy ➝ Organisation Preferences.

2. In the search box below enter text ‘mig’ and press search to find the enable MIG menu.

3. Tick **Enable MIG Integration** and enter your **practice ODS code** in the text box.