

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.

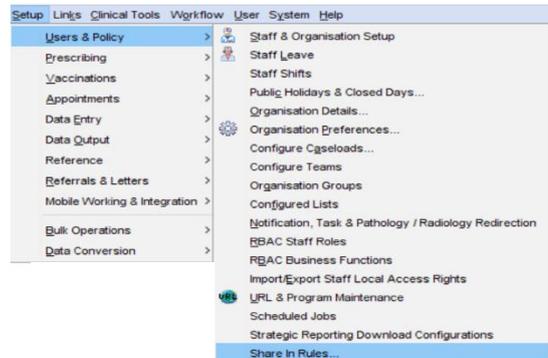
<input type="checkbox"/> Step 1.	Data Sharing Agreement (DSA) signed and sent to infoMidlandsYourCareConnected@nhs.net with ODS/NACS code in subject field e.g. MXXXXX DSA.
<input type="checkbox"/> Step 2.	Patient leaflets and posters will be delivered to your practice, please display these to help inform patients. Please update practice website to reference YCC.
<input type="checkbox"/> 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.
<input type="checkbox"/> Step 4.	Week 5, process and record Opt-Outs received for each patient using the instructions attached.
<input type="checkbox"/> Step 5.	Week 5, process consent sharing status in SystemOne for patients who have not opted out using the instructions attached.
<input type="checkbox"/> Step 6.	Activate Your Care Connected “ MIG Integration ” in SystemOne using the instructions attached.
<input type="checkbox"/> Step 7.	Go Live confirmed with GP Practice.
<input type="checkbox"/> Step 8.	Practice to ensure YCC information is included in new patient registration pack.
<input type="checkbox"/> Step 9.	Process opt-outs for new patients as and when received.

Step 4: Recording patient opt-out in SystemOne

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.

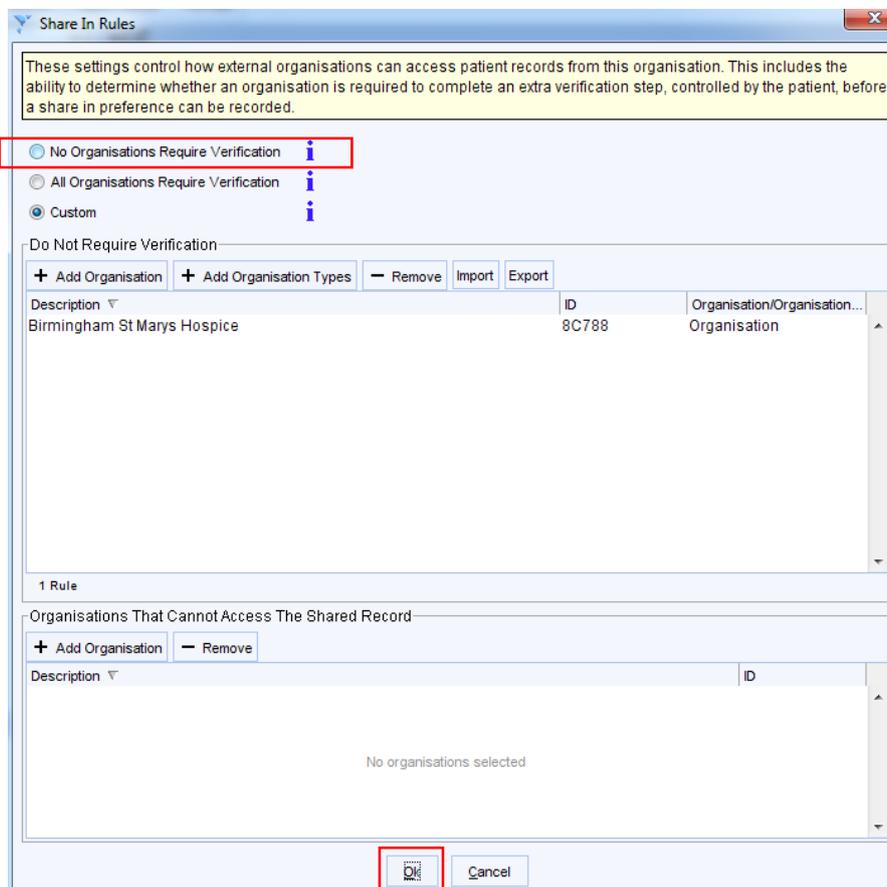
- From the menu bar, select:
Setup → Users & Policy → Share In Rules



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 opt out and batch changing consent status. “**Custom**” provides an additional layer of sharing security within SystemOne.

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



The screenshot shows the 'Share In Rules' dialog box. At the top, there is a text box explaining the settings: "These settings control how external organisations can access patient records from this organisation. This includes the ability to determine whether an organisation is required to complete an extra verification step, controlled by the patient, before a share in preference can be recorded." Below this, three radio button options are listed: "No Organisations Require Verification" (which is selected and highlighted with a red box), "All Organisations Require Verification", and "Custom". Below the options, there are two sections. The first section, "Do Not Require Verification", contains a table with one row: "Birmingham St Marys Hospice" with ID "8C788". The second section, "Organisations That Cannot Access The Shared Record", is currently empty and shows "No organisations selected". At the bottom of the dialog, there is an "OK" button (highlighted with a red box) and a "Cancel" button.

Opting out a patient – recording sharing out preferences

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.

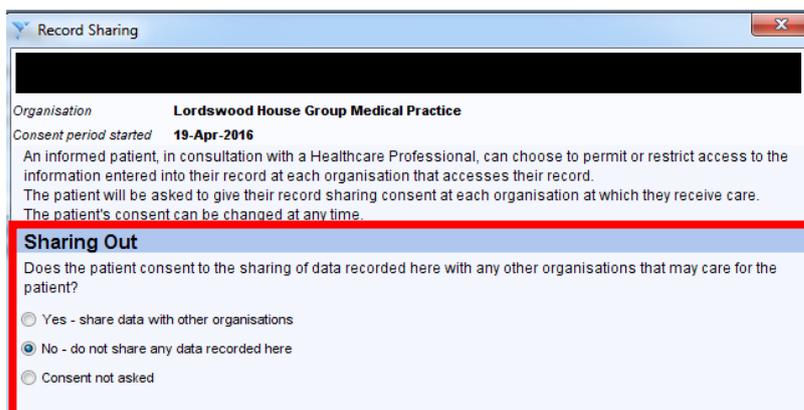
ACTION: Practices need to follow these steps to opt out each patient.

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**.



The screenshot shows the 'Record Sharing' dialog box. The 'Organisation' is 'Lordswood House Group Medical Practice' and the 'Consent period started' is '19-Apr-2016'. The 'Sharing Out' section is highlighted with a red box, and the 'No - do not share any data recorded here' radio button is selected.

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

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

Opting a patient back in

1. 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 **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

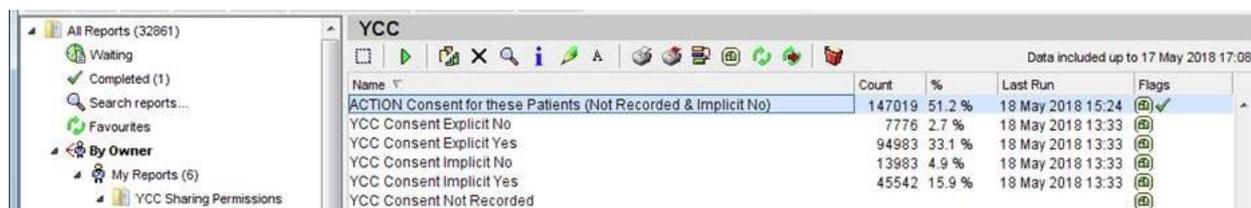
- Explicit Yes *Patient has told the practice either verbally or in writing they want to share their record.*
- Explicit No *Patient has told the practice either verbally or in writing they do not want to share their record.*
- Implicit Yes *Practice has assumed patient wants to share their record as they have not expressed to opt out.*
- Implicit No *Practice has assumed patient does not want to share their record.*
- 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:

- Run the searches from “**YCC Sharing Permissions**” as shown below

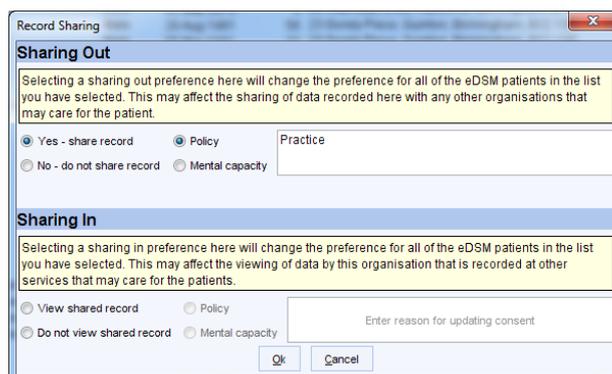


Name	Count	%	Last Run	Flags
ACTION Consent for these Patients (Not Recorded & Implicit No)	147019	51.2 %	18 May 2018 15:24	(i) ✓
YCC Consent Explicit No	7776	2.7 %	18 May 2018 13:33	(i)
YCC Consent Explicit Yes	94983	33.1 %	18 May 2018 13:33	(i)
YCC Consent Implicit No	13983	4.9 %	18 May 2018 13:33	(i)
YCC Consent Implicit Yes	45542	15.9 %	18 May 2018 13:33	(i)
YCC Consent Not Recorded				(i)

- 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.

- Bulk change each page:
 - Highlight the all patients in the page.
 - Click the Record Sharing button.
 - Select **Yes – share record**.
 - Select **Policy**
 - Type **Practice** into the text box.
 - Select **OK**
 - Apply the same steps to **all pages**.

Record Sharing

Sharing Out

Selecting a sharing out preference here will change the preference for all of the eDSM patients in the list you have selected. This may affect the sharing of data recorded here with any other organisations that may care for the patient.

Yes - share record
 Policy

No - do not share record
 Mental capacity

Sharing In

Selecting a sharing in preference here will change the preference for all of the eDSM patients in the list you have selected. This may affect the viewing of data by this organisation that is recorded at other services that may care for the patients.

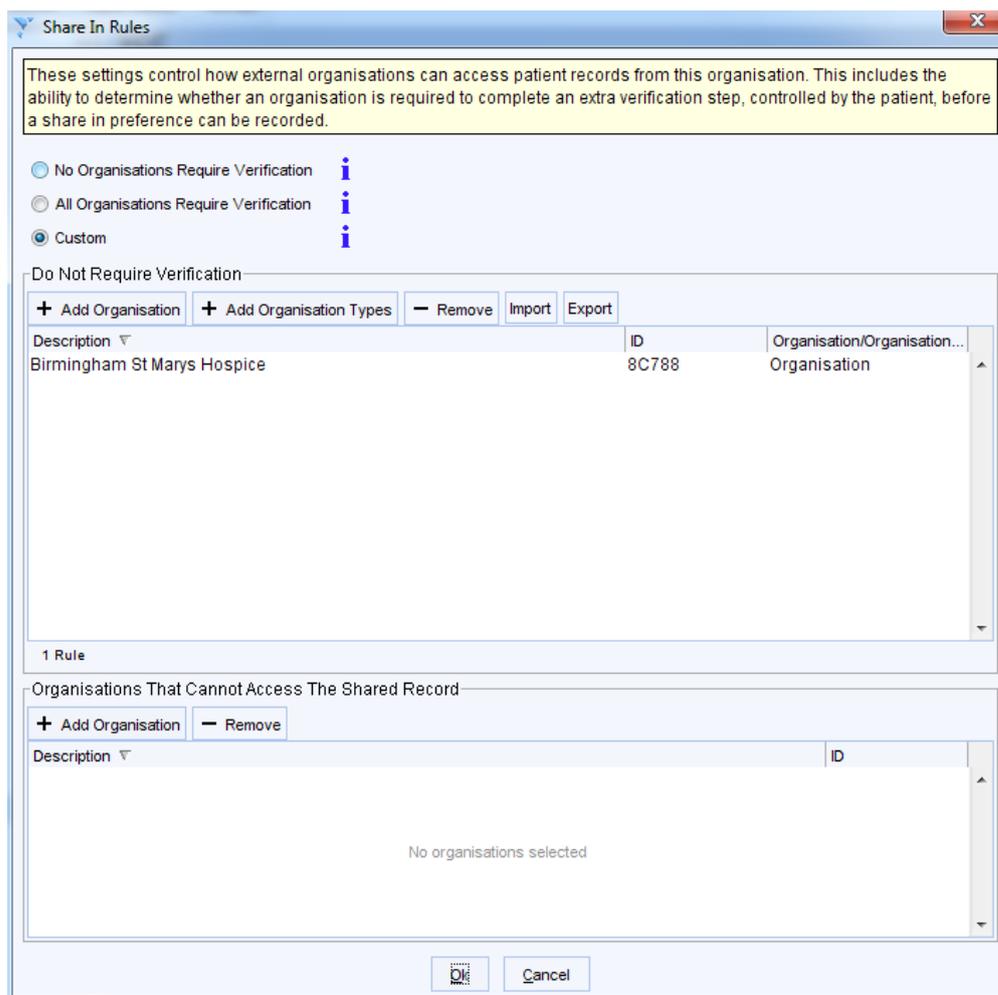
View shared record
 Policy

Do not view shared record
 Mental capacity

Enter reason for updating consent

OK Cancel

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 SystemOne and practices can specifically search and add any organisation they are sharing with such as a hospice or community).



Share In Rules

These settings control how external organisations can access patient records from this organisation. This includes the ability to determine whether an organisation is required to complete an extra verification step, controlled by the patient, before a share in preference can be recorded.

No Organisations Require Verification *i*
 All Organisations Require Verification *i*
 Custom *i*

Do Not Require Verification

+ Add Organisation + Add Organisation Types - Remove Import Export

Description ▾	ID	Organisation/Organisation...
Birmingham St Marys Hospice	8C788	Organisation

1 Rule

Organisations That Cannot Access The Shared Record

+ Add Organisation - Remove

Description ▾ ID

No organisations selected

OK Cancel

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 SystemOne guidance: “New Sharing Controls in SystemOne”.

Step 6: Activate Your Care Connected in SystemOne

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.

