East London **NHS**
NHS Foundation Trust

NHS numbers
procedure and guidance to ensure that the correct number is recorded and
used routinely in medical records and correspondence

1. The NHS number must be used in all clincial documents and correspondence including
   - letters
   - discharge summaries
   - referrals
   - court reports
   - Mental Health Act reports
   - Paper and electronic medical records
   - and other forms and correspondence

2. Documents produced from RiO have the NHS number automatically included.

3. Other documents and forms must have the NHS number included. The NHS number can be looked up on
   - The paper medical record
   - RiO
   - the Clinical Spine Application.

4. Guidance notes from Connecting for Health on how to use the CSA to look up the NHS number are attached below.

NHS Care Records Service

7871 2008-A SCR

Demographics User Guide

Supported by

BT

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Table of Contents

1 Document Purpose

This user guide is intended for users who perform the demographic related tasks within the Summary Care Record (SCR) application and provides functional step by step instructions supplying the necessary guidance to perform all user functions efficiently and effectively that enable the user to search for and locate a patient's demographic record. These are;

- Basic Search

- Advanced Search

- Search By NHS Number

- Select a patient from the search results

- View patient demographics

- Print patient information

- Edit patient demographic details

1.1 Disclaimer

All data and names used within this training material are for illustrative purposes only and bear no relationship to actual persons or organisations nor do they constitute correct or complete statements of fact, any and all similarities being purely coincidental.

SCR displays the information as sent from the GP Practice and renders it according to specified rules; it does not validate the content.

This material was created using pre-release software and as a result minor differences may exist between the screen images used and the released version.

BT is not responsible for the link to, nor the content or validity of internet sites referenced in this material.

1.2 Notice

Healthcare Professionals should use their professional judgement and use the summary record as a source of patient information to support rather than replace the recognised and established process of patient assessment. If the integrity of any clinical data is in doubt its validity should be checked with the patient, their carer or other sources of information.

1.3 Browser Settings and Window Applications

It is advised:

- not to use more than one browser session as important information may be obscured.

- not to use browser navigation options as this may lead to old information being displayed.

- not to use "always on top" if an application provides this facility as it may obscure important information which may contribute to a delay in the provision of care.

2   The Summary Care Record application

The Summary Care Record application (SCR) is a web based user interface that facilitates the access to information held on the NHS Care Records Service (NHS CRS) and it replaces the Clinical Spine Application (CSA).

For a patient to receive the best care from the NHS it is necessary for their information to be available wherever and whenever it is needed. The NHS Care Records Service (NHS CRS) will allow this to happen. For the first time, information about patients held electronically, will be accessible when they present for treatment anywhere in England.

The NHS Care Record for a patient will consist of information built up over time, as they present for treatment.

A patient might be treated at the GP's surgery or the local hospital. Information is captured as a Detailed Care Record at the point at which treatment is provided. This Detailed Care Record is accessible within a limited geographical area. As well as this, a Summary Care Record of important details will be held on a national database called the Spine. These details will be both demographic (such as name, address and date of birth) and clinical (such as allergies, medication and some clinical correspondence). The Summary Care Record is available nationally to authorised healthcare professionals, wherever the patient may present for treatment in England.

The preferred method of interacting with patient data is to access the Detailed Care Record. Healthcare professionals who are unable to access the appropriate Detailed Care Record are able to view a patient's Summary Care Record through the SCR application.

The SCR application provides a means to view the patient's demographic details with the ability to update these details if your job role allows. With the appropriate level of access you can view the clinical details stored in the Summary Care Record which will be available nationally, 24 hours a day, 7 days a week.

2.1   SCR Users

There are two types of users, Demographic and Clinical.

Demographic users may be former NSTS users and they can be broken down into 3 groups:

- Back office (data quality and administration)

- Patient facing (e.g. clinic administration)

- Clinical support users (e.g. unscheduled care patient registration).

Clinical users/clinicians are those users involved in a patient's care and once Summary Care Records are available within their area they will be able to use the SCR application to view the patient's record.

2.2   Audit trail

All actions within SCR are audited. An audit log entry is logged when a single result is returned from a search; when a search returns a list of results; when a warning informs you that too many matches have been found; when the **View patient list** hyperlink is selected and when the demographic record is opened. If the record being looked at is a "stop noted" record, an email alert may be sent to the Delegated Authority of the Caldicott Guardian.

3   The Spine Portal

The function of the Spine Portal is to provide a single, secure point of entry to a number of applications being provided as part of the NHS Care Records Service. All BT developed applications are accessible through a web browser and the availability of each application depends upon your job role and its associated permissions.

Note: GemAuthenticate Client v5.2.1 was used to capture the screen images.

3.1   To Log on to the Spine Portal

1.   Insert your Smartcard into the card reader.

The system will check the credentials of the Smartcard and then request you to enter your Passcode.

Figure 1 - Log on to the Spine Portal - Passcode required

2.   Enter your Passcode.

3.   If you have more than one job role, click the session role hyperlink you wish to use.

Figure 2 - Log on to the Spine Portal - Select your session role

Note: If you only have one job role the job role selection screen will not appear.

The following message will be displayed to confirm your name, organisation and job role, this will disappear after a few seconds.

Figure 3 - Log on to the Spine Portal - "You are logged on as"

You are now logged on to the Spine Portal. Open the Portal through any desktop shortcuts.

3.2   To Log off the Spine Portal

To log off the system, you simply remove your Smartcard from the card reader. Removal of the Smartcard will log you out of the Spine, its applications and the Spine Portal.

Warning: Simply removing your Smartcard may close any open Browser windows without warning and unsaved data may be lost. This may include Browser sessions that have been launched from outside of the Spine Portal. This depends on local configuration of your system.

4   To understand Smartcard and Portal Messages

Listed below are the potential Smartcard and Spine Portal problem messages that may be displayed:

4.1   There is no Smartcard reader available
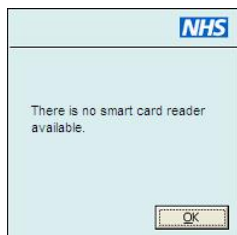
This message will appear at start up if your Smartcard reader has become detached from your computer. This message can also indicate that the Smartcard reader drivers have not been installed.

Reconnect your reader and restart your machine.

4.2   The Passcode you entered is not valid. You have 'n' remaining tries
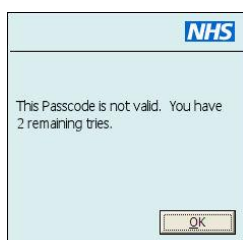
You have three attempts to enter your Passcode.

Click the **OK** button and enter the correct Passcode.

After three failed attempts your Smartcard will be locked (blocked).

4.3   Your Smartcard is blocked

If you attempt to access the system with a locked (blocked) Smartcard you will be shown an error message.

This screen is also displayed when you have exceeded the invalid login attempts.

Contact your Registration Authority Personnel to have the Smartcard reset and unlocked.

4.4   The user credentials presented are not valid
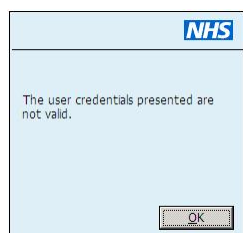
This message appears if you try to authenticate with a Smartcard that is not valid. For example, someone permanently leaving the NHS would have their card revoked. If they tried to access the Spine using the revoked card they would be denied access.

Contact your Registration Authority Personnel to investigate the Smartcard.

4.5   No certificate was found to perform authentication

This message indicates that the Smartcard contains no certificates to allow authentication.

Contact your Registration Authority Personnel to investigate the Smartcard and see if the certificates were written correctly.

4.6   Your Smartcard is about to expire. Do you wish to renew it now?
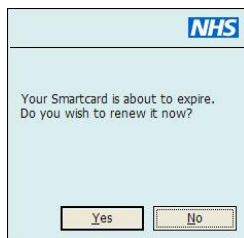
This message indicates that you are able to renew your certificate(s) without meeting an RA and you are within the expiry notification period.

If you select **Yes** you will be presented with the Self Service Portal.

4.7   Your Smartcard is about to expire. You must renew now
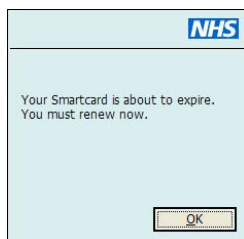
This message indicates that you are able to renew your certificate(s) without meeting an RA and you have to complete this action now, you have reached the end of the expiry notification period.

When you select **OK** you will be presented with the Self Service Portal.

4.8   Your Smartcard has expired. Please contact your RA Manager

This message indicates that you have passed the expiry notification period and are unable to use your Smartcard. You must contact your RA Manager to re-enable access.

4.9   One or more of your Passcodes is about to expire. Do you wish to update now?
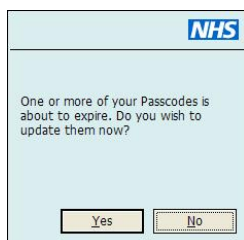
This message indicates that at least one of your Passcodes is about to run out. This could be your **Account Recovery**, **Verification and/or Smartcard Passcode**.

If you select **Yes** you will be presented with the Self Service Portal.

4.10   One or more of your Passcodes is about to expire. You must update them now
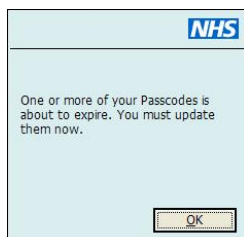
This message indicates that at least one of your Passcodes is about to expire and you have to alter it/them now.

When you select **OK** you will be presented with the Self Service Portal.

4.11   One or more of your Passcodes have expired. Please contact your RA Manager
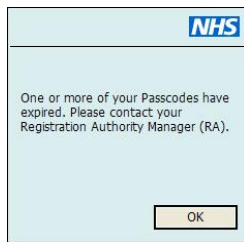
This message indicates that at least one of your Passcodes has expired. You must contact your RA Manager to re-enable the Passcode(s).

4.12   An unexpected error occurred during the authorisation process

At any time when logging on to the Access Portal, or during general system usage you may encounter the "An unexpected error occurred during the authorisation process" error message.

Follow the instructions shown and click the hyperlink to Return to Portal Page you may need to log on again.

4.13   Connection to the server or http request to the server failed

When logging on to the Access Portal, you may encounter the "Connection to the server or http request to the server failed" error message.

To resolve the message carry out the following steps.

1.   Click the **OK** button and try logging on again.

      If the message reappears. You will need to remove your Smartcard then close and restart GemAuthenticate.

2.   Close GemAuthenticate by right clicking the **GemAuthenticate** Icon in the system tray at the bottom right of the screen.

3.   Click **Quit** from the menu.

4.   Restart GemAuthenticate by following the path below:

      Start | Programs | Gemplus | GemAuthenticate | GemAuthenticate Client

5.   Try logging on again.

6.   If the message reappears you need to save all work and restart the computer.

      If this has not resolved the message, contact your help desk to check service availability.

5 To Access SCR

1. Log on to the Spine Portal.

2. Click the <u>Launch Summary Care Record</u> hyperlink from the Portal.

    A browser window opens and you are required to enter your Passcode (it is the same Passcode you used when you inserted your Smartcard).
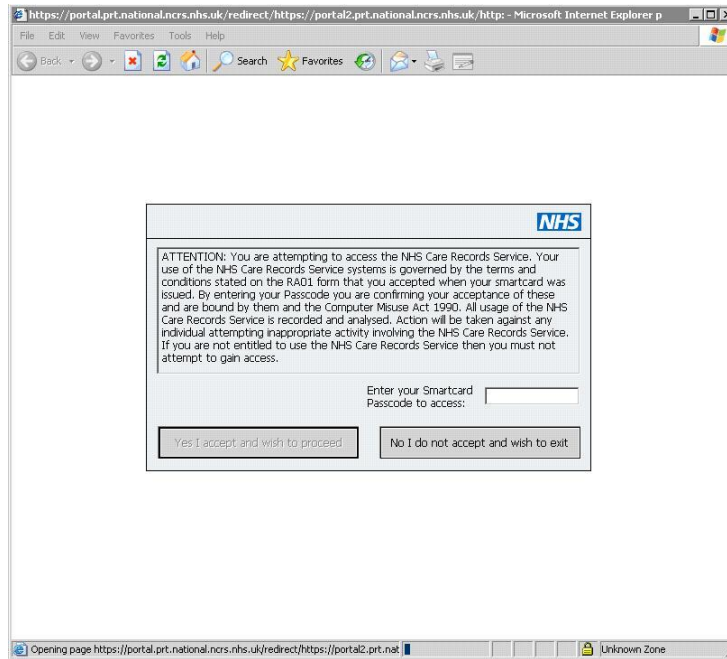
Figure 4 - Smartcard dialog box requiring Passcode to be entered

3. Enter your Passcode.

    <u>Note</u>: You have 3 attempts to input your Passcode. If your Passcode is unrecognised or you press the **No I do not accept and wish to exit** button at this point you will need to close the browser and re select SCR from the Access Portal.

4. Click the **Yes I accept and wish to proceed** button.

    If you have one role in SCR, the SCR **Basic Search** screen is displayed.

    If you have more than one role in SCR and your current session role does not have access permissions to SCR, the SCR **Role Selection** screen will be displayed.

    The **SCR Find a patient - Basic search** screen is now displayed.
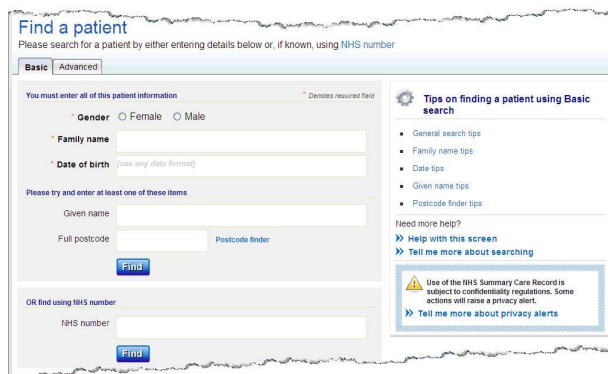
Figure 5 - The SCR Find a patient - Basic search screen

5.1   To Change Role within SCR

> This functionality is only available to users with more than one role that can access SCR and can be accessed at any time from any screen. Different job roles may give you access to different functionality and assorted groups of patient records due to the Legitimate Relationships they provide.

1.   Click the Change role hyperlink in the **global menu** (top of screen).

⚠️   Warning: If you are viewing a patient's summary record you are warned that the current record will be closed and asked to confirm that you wish to do this.

2.   Click the **Continue** button.

       Your SCR job roles are listed.

Figure 6 - Role Selection

3.   Click the radio button next to the role you wish to perform.

4.   Click the **Continue** button.

       The new role is selected and the **Find a patient - basis** screen is returned.

5.2   To Exit SCR

> When you exit SCR the browser window in use is closed, removing all confidential information from view. If you do not have time to exit the application using the steps below, simply remove your Smartcard from the reader. SCR will close down **all** browser windows and protect the confidentiality of the patient.

1.   Click the Exit hyperlink in the **global menu** (top of screen).

2.   Click the **Continue** button to confirm the closure of the application.

6   Getting Started

The SCR application consists of screen elements which provide you with links to additional functionality or further information.

Global menu   Actions for this patient drop down

Patient banner

Tabs

sub-tabs

User information

Figure 7 - SCR screen overview

6.1   The Global menu

These options are available on every screen; **Find a patient**, **Change role**, **Help**, **Exit** and **Print**. **Find a patient** allows you to close the displayed record and search for a new patient. **Change Role** is only active if you have more than one role with access to SCR. **Help** opens a new window displaying help information about your current screen. **Exit** ends the current SCR session with the closure of the browser window after confirming this action is to be taken and **Print** allows you to print the contents of the current screen (if available).

6.2   The Patient banner

This banner clearly identifies the patient whose details are displayed on the screen. It shows their name, date of birth, gender and NHS Number. If the patient is deceased it will also show their date of death. It could also include a warning to indicate that the record is subject to a data quality investigation (flagged as Business B).

6.3   Actions for this patient

This is a drop down list providing access to additional functionality specific to your context within the application. You select an option from the list and then click the **Go** button. The options available will vary depending on your role profile. The follow table lists the options that could appear in this drop down.
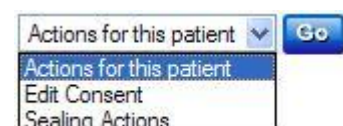
Option	Description
Back to patient list	Will close the active patient record and return you to the Patient list screen (*This option is only available to non-clinical users*).
Sealing Actions	There are four sealing actions; sealing, unsealing, refusal to seal and sealing history. This option takes you to a screen where you can select one of these sealing actions. *It is only available to clinical users with permission to establish sealing controls.*
Select for care	This option will add the patient to the SCR user's current work groups in order to create a Legitimate Relationship for the team. *It is only available to non-clinical SCR users with permission to create a patient self-referral Legitimate Relationship.*
Edit Consent	Will display the screen that allows you to update the patient's consent status, at their request. This includes both consent to store and consent to share. *It is only available to SCR users with permission to update patient consent status for the Summary Care Record.*

6.4   Tabs and sub-tabs

The main tabs in SCR, displayed according to your role profile, are:

- **Patient details**

- **Clinicals**

- **HealthSpace**

The sub-tabs are the screens available within the selected tab these are displayed on the line below. For example using previous figure the sub-tabs are **Key demographic information**, **GP & care providers**, **Related people** and **Historical information**.

6.5   User information

The banner at the foot of the screen carries a confidentiality reminder and your name, role and organisation as the active SCR user.

6.6   Further screen elements

Figure 8 - SCR screen overview - Further information

6.6.1   Icon and info bar

Icons and information messages are displayed in this section of the screen. There are a number of different types of icon message that could appear here, such as the flags indicating sealed documents, or data quality warnings.

6.6.2   Main screen area

Most content is displayed in the main screen area.

6.6.3   Navigation bar

On certain screens beneath the sub-tabs the Navigation Bar will be visible this contains buttons that enables you to manoeuvre back from the current screen.

6.6.4   Right hand panel

This panel is screen and context sensitive. In some cases it displays relevant help information, including links to on-line Help.

6.7   To Print within SCR

Only some of the screens in SCR can be printed. Printable screens include the patient's demographic details. If a screen can be printed, then the **Print** option will be available on the **global menu**. This is the only way you should print information from SCR.

1.   Navigate to the Patient Record.

2.   Click the Print hyperlink on the **global menu**.

3.   Set any further print settings as required.

4.   Click the **Print** button.

6.8   Getting Help

There are a number of ways you can get help whilst using SCR. The application has been designed to provide you with supporting information and guidance as you work. Help can be accessed by:

- Accessing on-line help
- On-screen help panels
- On-line help navigation
- Using the glossary

6.8.1   To access Help

1.   Click the Help hyperlink on the **global menu**.

Help opens in a new window displaying information about the current screen in the main Help panel. Explanations about the purpose and content of the screen are provided with step-by-step instructions, if necessary.
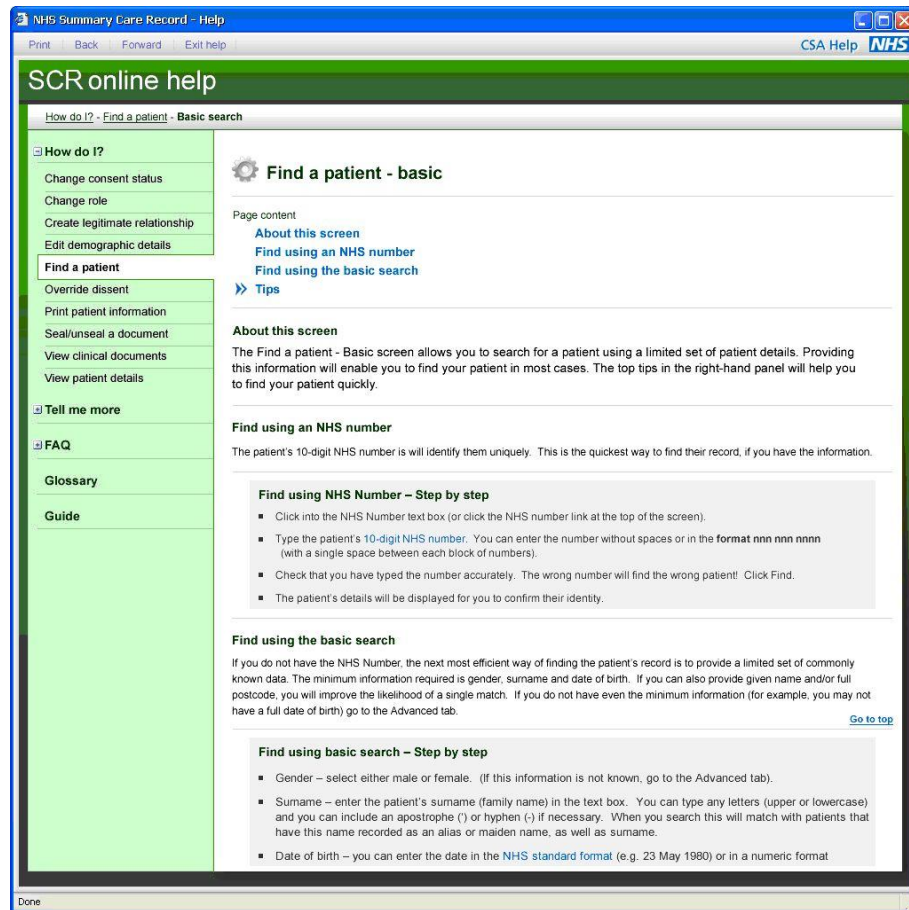
Figure 9 - SCR online help

- Click any provided links within Help. Navigate using these links and the Back hyperlink.

- Use your Task to work with the application and Help.

2. Click the ☒ **Close** button on the Help window to exit.

6.8.2   The Help screen

The navigation panel, displayed on the left of the screen, is always visible when you are in Help. It provides access to all the different sections of Help and allows you to find what you are looking for quickly and easily.

The navigation panel has two sub-menus; **How do I?** and **Tell me more** as well as **FAQs** and the **Glossary**.

6.8.2.1   How do I?

This is a menu of the different tasks you may need to carry out within the application. The tasks are listed in alphabetical order. Selecting an option here will take you to the relevant section of Help which will include step-by-step instructions for the task.

6.8.2.2   Tell me more

This is a list of topics that you may want to know more about. It includes information that will help explain the applications functionality. For example, there is information about the access controls that restrict what you can see and do in the application. This may help you to understand why you were unable to access a specific patient's records.

6.8.2.3   Glossary

The glossary is an alphabetical list of definitions to help you understand the terminology and abbreviations used within the application. Links to sections within Help are also provided for some definitions.

6.8.3   On-screen help navigation

Often displayed in the right hand panel of the main SCR screen are links to related help topics. These are context sensitive and will change depending on the task you are undertaking.

Click a link to launch the help window to display this related topic.

Figure 10 - On-line help navigation

7   Patient Search

There are various methods of searching for a patient. It is worthwhile asking yourself a few questions first, in the following order to determine the best method to find your patient.

❶ *Do you have their NHS Number?*   *If Yes, perform an NHS Number search.*

❷ *Do you have their full Date of Birth?*   *If No, perform an Advanced search.*

❸ *Do you have an accurate Surname?*   *If No, perform an Advanced search with 'sounds-like' option selected.*

❹ *Do you have a Full Postcode?*   *If Yes, perform a Basic search.*

❺ *Do you have any Address details?*   *If Yes, use the Postcode finder, Then perform a Basic search.*

❻ *If you have none of the above, with a common Surname perform an Advanced search otherwise try a Basic search.*

Ultimately having the 10 digit NHS Number for a patient is the quickest and most efficient method of tracing a patient as it will identify them uniquely.

7.1   Find a patient - Basic

Using a small set of patient details the basic search will enable you to find your patient in most instances. The screen is essence has two sections, the basic search above the first **Find** button, with the NHS Number search at the bottom of the screen between both **Find** buttons.

Figure 11 - Find a patient - Basic

7.1.1   To perform an NHS Number search

The NHS Number search with a correct NHS Number will return a single matched patient record.

1. Click the Find a patient hyperlink on the **global menu** (if this screen is not displayed by default).
2. Type the 10 digit NHS Number with or without spaces in the **NHS NUMBER** field.
3. Click the **Find** button.

   A single match or no record found message will be displayed.

7.1.2   To perform a Basic search

The red asterisks represent mandatory fields that are required input for a basic search. Providing any additional information will increase the probability of finding a single match.

1. Click the Find a patient hyperlink on the **global menu** (if this screen is not displayed by default).
2. Click the **Female** or **Male GENDER** radio button.
3. Type a Surname in the **FAMILY NAME** field.

   Note: This can be in any case, include apostrophes, hyphens and will match against patients with this recorded Surname, Alias and/or Other Name (i.e. Maiden Name).

4. Type a Date of Birth in the **DATE OF BIRTH** field.

   Note: Dates can be entered using a space, dash or slash as your separator with or without leading zeros. You can use the NHS standard date format of dd Mmm yyyy (e.g. 15 Nov 1990), this is the format that is used to display dates, regardless of how they were input.

   It is recommended that you always enter the year as four digits for accuracy of century, however entering the last two digits is accepted and the application will determine if the date is to be preceded by 19 or 20 based on the current date.

   In addition for Date of Birth, you cannot enter a date that is in the future or one that is more than 150 years in the past.

   The mandatory fields are now completed, you can at this point opt to find your patient, however providing two more optional pieces of information will be useful in reducing the number of results returned and eventually returning a single match.

5. Type a first name in full in the **GIVEN NAME** field.
6. Type a full postcode in the **FULL POSTCODE** field.

   Note: If you do not have the full postcode you will need to use the Postcode finder facility.

7. Click the **Find** button.

   A single match or message will be displayed to refine your search further.

7.1.2.1   Search Outcomes

The following search outcomes apply to you performing a basic search.

Outcome	Explanation
More than 50 matches	You will be asked to refine your search. Provide more information, if you have it, or go to the **Advanced** tab.
Between 2-50 matches	If you did not complete both optional fields (**GIVEN NAME** or **FULL POSTCODE)**, you will be asked to provide this information on the **Basic** search screen.
Between 2-50 matches	If you did complete both optional fields (**GIVEN NAME** and **FULL POSTCODE**) you will be asked to provide more information on the **Advanced** tab.
Single match	The single matched record will be returned.
View patient list	If you have no further details, the ⚠ **View patient list** is also available to you. Selecting this hyperlink will display the matching records to enable you to identify your patient. Using this option may breach patient confidentiality and the action is therefore audited and may be investigated.
No matching records	If there are no matching records you may have included information that does not match the demographic details recorded for the patient. Check if any details have changed recently and try searching on their previous information.

7.1.3 The Patient List screen - Selecting a patient to view

> You have clicked the **Find** button and have not returned a 'single patient match'; you should attempt to provide more specific criteria to identify your patient. Only if you are unable to do so should you use the **View patient list** hyperlink to see the list of matching records, up to a maximum of 50 records.
>
> Doing so may breach patient confidentiality and the action will be audited.

Figure 12 - View Patient list button and warning

1. Click the ⚠ **View patient list** hyperlink.

   A list of patients is returned and this action has been audited.

2. Move your mouse up and down the list.

   The record will highlight blue making the row easier to read. If the record highlights black this indicates that the patient is deceased. The record will also display the recorded date of death for this patient.

   > ⚠ It is your responsibility to identify the correct record, as acting on the wrong patient record may contribute to delay in the provision of care or the provision of inappropriate care.
   >
   > If the record displays ****irregular record** on the information line, this is an indication that the record is subject to a data quality investigation and the accuracy of the information may be uncertain.

3. Click anywhere on the line of the required patient record to select.

7.1.3.1 Broaden Search, Narrow Search and/or New Search

You can use Broaden Search, Narrow Search and/or New Search to assist you if you do not get the results you expect.

Broaden Search

If there are no matching records or the record you're expecting to return is not found, use this hyperlink to check your search criteria is correct and/or remove some data to expand the results.

Narrow Search

Too many results require additional criteria to be input. Use the Narrow search hyperlink and provide (if possible) the additional information that SCR requests.

New Search

This hyperlink provides a quick mechanism to start again.

7.2   Using the Postcode finder

If you have some address information, use the Postcode finder to find or confirm the full postcode. This should be possible in most cases and is the recommended method of entering a postcode.

Using a full postcode in a Basic Search will greatly improve the probability of finding a single match.

1.   Open your search screen this can be a Basic or Advanced search.

2.   Click the Postcode finder hyperlink.

Figure 13 - The Postcode finder

3.   Enter as much information in the **ADDRESS**, **TOWN** and **COUNTY** fields.

         Note: You must enter at least the postal town (line 4) with either the house/building name or number (line 1) and street (line 2).

4.   Click the **Find** button.

         Matched addresses are displayed in a scrollable panel
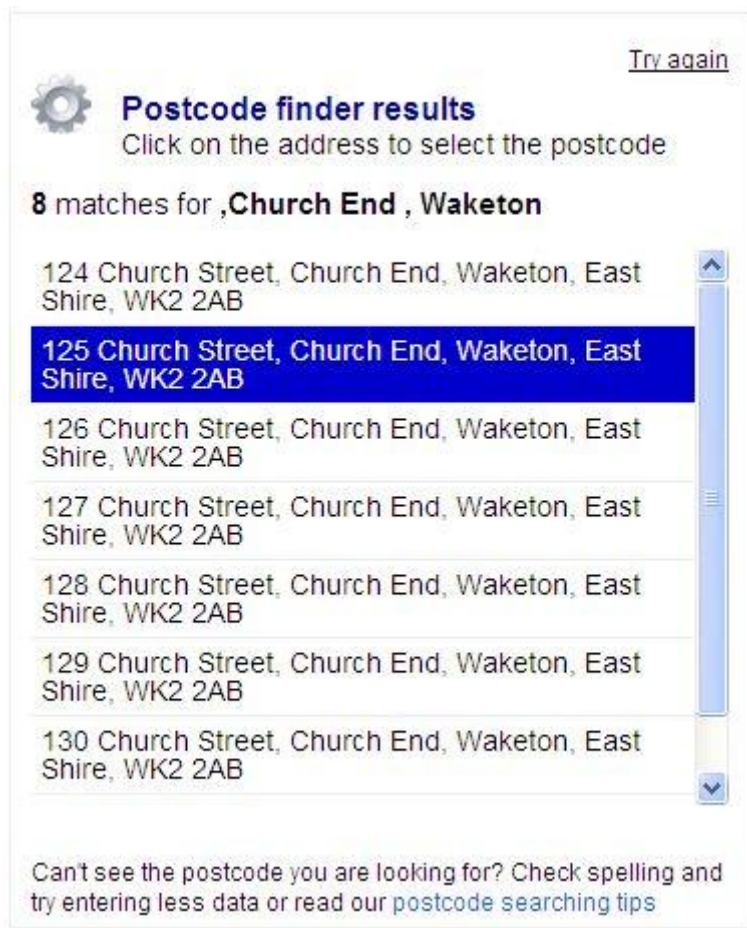
Figure 14 - The Postcode finder results panel

5.   Click on the correct address in the displayed list.

Or

Click the Try again hyperlink to change your search criteria.

Note: The Postcode finder allows for common misspellings and you are able to use the wildcard character in any line. If more than 99 matching addresses are found an error message will be displayed asking you to refine your search criteria and if no matches are returned you will be required to provide less information.

The Postcode finder only searches UK addresses.

7.3 Find a Patient - Advanced

> An advanced search enables you to search using a wider range of patient details compared to the basic search. The mandatory fields remain the same as that of the basic search however you can be more flexible through the use of wildcards and Sounds-like options.
>
> The red asterisks represent mandatory fields that are required input for an advanced search. Providing any additional information will increase the probability of finding a single match.

1. Click the <u>Find a patient</u> hyperlink on the **global menu** (if this screen is not displayed by default).

2. Click the **Advanced** tab.

Figure 15 - Find a patient - Advanced

3. Click the **Female**, **Male**, **Not known** or **Not specified GENDER** radio button.

Gender	Description
Female	Returns patients whose gender has been recorded as your selected choice: Female or Male
Male	
Not known	Returns patients who have no recorded gender information.
Not specified	Returns patients whose gender has been recorded as indeterminate (i.e. Cannot be classified as Female or Male).

4. Type a Surname in the **FAMILY NAME** field.

   Note: This can be in any case, include apostrophes, hyphens and will match against patients with this recorded Surname, Alias and/or Maiden Name.

> You are also able to use the wildcard character * in this field to widen the search or assist you if you are in doubt over the correct spelling of the patients name.

5. Type an exact Date of Birth in the **DATE OF BIRTH FROM** field if you have this provided for the patient.

> Note: Dates can be entered using a space, dash or slash as your separator with or without leading zeros. You can use the NHS standard date format of dd Mmm yyyy (e.g. 15 Nov 1990), this is the format that is used to display dates, regardless of how they were input.
>
> It is recommended that you always enter the year as four digits for accuracy of century, however entering the last two digits is accepted and the application will determine if the date is to be preceded by 19 or 20 based on the current date.
>
> In addition for Date of Birth, you cannot enter a date that is in the future or one that is more than 150 years in the past.

Or

Type a partial date in the **DATE OF BIRTH FROM** field, if an exact date is not known, such as the year or month plus year.

Or

Type a start date in the **DATE OF BIRTH FROM** field

Then

Type an end date in the **DATE OF BIRTH TO** field to set the date range to search.

The mandatory fields are now completed, you can at this point opt to find your patient, however providing more optional pieces of information will be useful in reducing the number of results returned and eventually returning a single match.

6. Type a first name in full in the **GIVEN NAME** field this can include wildcard characters if required.

7. Type any additional names in the **MIDDLE NAME(S)** field.

> Note: Only use this field if too many results are returned and you are unable to narrow the search further using other fields. Wildcard characters are permitted to be used in this field.

8. Type an exact date of death in the **DATE OF DEATH FROM** field.

Or

Set a date range using **DATE OF DEATH FROM** and **DATE OF DEATH TO**.

9. Type a postcode in the **POSTCODE** field.

> Note: If you do not have the full postcode you should use the <u>Postcode finder</u> facility, however you can enter a partial postcode with the wildcard character.

10. Type GP details in the **GP(GNC) CODE** field of the GP.

Or

Type GP details in the **PRACTICE CODE** field of the GPs Practice.

Note: The GP (GNC) code or Practice code will assist in narrowing your search.   The GP (GNC) code starts with a G followed by 6 numbers and the Practice code starts with a letter followed by 5 numbers.

11.   Click the **Find** button.

7.3.1   Search Outcomes

The following search outcomes apply to you performing an advanced search.

Outcome	Explanation
More than 50 matches	You will be asked to refine your search. Provide more information, if you have it.
Between 2-50 matches	If you did not complete any optional fields (GIVEN NAME, MIDDLE NAME, POSTCODE, DATE OF DEATH FROM, DATE OF DEATH TO, GP (GNC) CODE or PRACTICE CODE), you will be asked to provide this information on the **Advanced** search screen.
Single match	The single matched record will be returned.
View patient list	If you have no further details, the ⚠ **View patient list** is also available to you. Selecting this hyperlink will display the matching records to enable you to identify your patient. Using this option may breach patient confidentiality and the action is therefore audited.
No matching records	If there are no matching records you may have included information that does not match the demographic details recorded for the patient. Check if any details have changed recently and try searching on their previous information.

7.3.2   Displaying the Patient List

See The Patient List screen - Selecting a patient to view on page 25.

12.   Click the <u>View patient list</u> hyperlink to return a list of matched records.

13.   Move your mouse up and down the list.

14.   Click anywhere on the line of the required patient record to select.

7.3.3   Find a Patient - Advanced - using the Sounds-like option

When an advanced search is performed it defaults to exact match searching this means that your criteria has to match exactly with the stored data.   The **Sounds-like** option broadens your search by looking for common misspelt or alternative spellings of names.

You must complete the **POSTCODE** and/or **GIVEN NAME** fields and remove all wildcards from all fields.

- Follow all the steps for an advanced search ensuring that no wildcards are entered.

- Check that the **POSTCODE** field is completed.

   And/Or

Check that the **GIVEN NAME** field is completed.
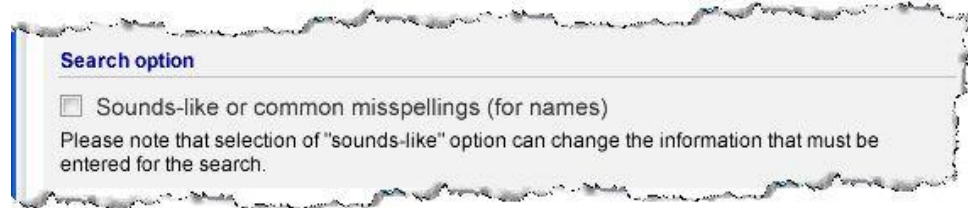
Figure 16 - Find a patient - Advanced - The Sounds-like option

- Click the **Sounds-like** checkbox.

- Click the **Find** button.

7.3.4   Find a Patient - Advanced - using partial dates and date ranges

When entering a date for an **Advanced** search, if you do not have an exact date you can enter a partial date - month and year, or just year in the **FROM** field. The application will interpret the partial date as a date range.

You can also set a date range using both the **FROM** and **TO** field as an alternative to partial dates.

Partial date examples

Date of birth/death From	Date of birth/death to	Application converts to	
		Date of birth/death From	Date of birth/death to
Oct 1980		01 Oct 1980	31 Oct 1980
06/1985		01 Jun 1985	30 Jun 1985
1990		01 Jan 1990	31 Dec 1990

Date Range examples

Date of birth/death From	Date of birth/death to	Application converts to	
		Date of birth/death From	Date of birth/death to
Oct 1980	1982	01 Oct 1980	31 Dec 1982
06/1985	04/1989	01 Jun 1985	30 Apr 1989
1990	13/11/1992	01 Jan 1990	13 Nov 1992

7.3.5   To use wildcards in an advanced search

The wildcard character is the asterisk (*) and represents a number of unknown characters when searching. It can be used in the advanced search against the following fields:

- Surname

- Middle name(s)

- Given name

- Postcode

To use the wildcard character you must type in a minimum of 2 characters followed by the asterisk. You can add characters after the wildcard and use multiple asterisks in a field.

See the following examples:

Field Criteria	Result
Jo*	John, Joan, Joe, Joel, Joseph, Jonathan, Jordan, Joshua
Jo*n	John, Jonathan, Jordan
Jo*ath*n	Johnathan, Jonathan, Jonathon (same name different spellings)
Me*an	Meagan, Megan, Meghan (same name different spellings)
NE1*	Postcodes starting with NE1, NE11 to NE19 are returned
NE1 *	NE1 postcodes are only returned as a space is included before the asterisk as the postcode separator

7.3.6   Hints and tips for performing an advanced search

The application's on-line help can assist you with lots of hints and tips as to how to broaden or narrow your search.

8   Patient Details - Overview

Every NHS patient in England has their demographic details stored as part of their Summary Care Record. These details may also be held on other systems, such as a PAS system; however the master record is the one that is stored in the patients Summary Care Record. The SCR application views the master demographic record on the **Patient Details** tab. This tab is visible to clinical and non clinical users.

The **Patient details** tab is displayed once you select the patient you are looking for from the **Patient list** screen.

There are four sub-tabs for the patient.

- Key demographic information

- GP & care providers

- Related people

- Historical information

8.1   The Patient Details tab - Key demographic information

The Key demographic information sub-tab holds Name and Address details, Contact information and Other information for your selected patient.

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

Figure 17 - Key demographic information sub-tab

- Click any of the provided **Edit** buttons to amend the patient information. If your role does not allow demographic editing these buttons will not be displayed.
(See section 9, Edit Demographics for further instructions.)

Figure 18 - New address pending

- The patient record may display ► **New address pending** and/or ► **New name pending** this indicates that the patient has notified a forthcoming change. Click on these hyperlinks to expand the view and see the recorded details such as the date this change becomes effective. These hyperlinks are toggles, click again to reduce the view.

8.2   Updating Patient Consent

Consent can only be updated when the patient is present and in agreement. This action is audited.

The Update consent option is only available to you if you are authorised to complete this task in your current role profile.

1.   Click **Update consent** from the **Actions for this patient** drop down list.

2.   Read all screen warnings.

Figure 19 - Update consent screen

3.   Click either the **Express consent** or **Express dissent** radio button for the Consent to store and/or Consent to share

4.   Click the **Continue** button.

A confirmation screen is displayed.

Figure 20 - Update consent - Confirm screen

5.   Review the details and check they are correct.

6.   Click the **Confirm changes** button.

The **Patient details** tab is displayed with the consent status updated.

Figure 21 - Successfully updated consent message

8.3   To record a patient's self-referral - Select for care

The LR can be between a patient and healthcare professional directly as in a self-claimed LR, or through the mechanism of a Work Group. A Work Group is a group of people that work together to provide care to a number of patients (such as the care team on a specific ward). As a member of a Work Group you will automatically have an LR with all the patients that are in the Work Group (admitted to that ward).

If a patient presents for treatment in an unscheduled care setting, such as out of hours or A&E, as part of the registration process an authorised SCR user can add them to their Work Groups. This action is called **Select for care**. It will create a patient self-referral LR for the patient and provide the appropriate care team with an LR to access their records

1.   Search and locate the patient's record.

2.   Confirm with the patient that the displayed record is correct by asking them additional questions.

3.   Click **Select for care** from the **Actions for this patient** drop down list.

4.   Click the **Go** button.

A confirmation message displays stating that a self-referral LR has been created between the patient and your Work Group.

8.4   The Patient Details tab - GP & care providers information

The GP & care providers sub-tab displays details of who you can contact regarding the healthcare of the selected patient.

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2.   Click the **GP & care providers** sub-tab.

Figure 22 - GP & care providers sub-tab

3.   Click on any <u>hyperlink</u> to view further details. This information is sourced from the Spine Directory Service (SDS).

And

Click on the <u>Patient details</u> hyperlink to return back to the GP & care providers information.

8.5   The Patient Details tab - Related people information

> The Related people sub-tab displays key contact information of who you can contact regarding the welfare of the selected patient.

1.   Navigate to the **Patient details** tab.

      The **Key demographic information** screen is displayed.

2.   Click the **Related people** sub-tab.
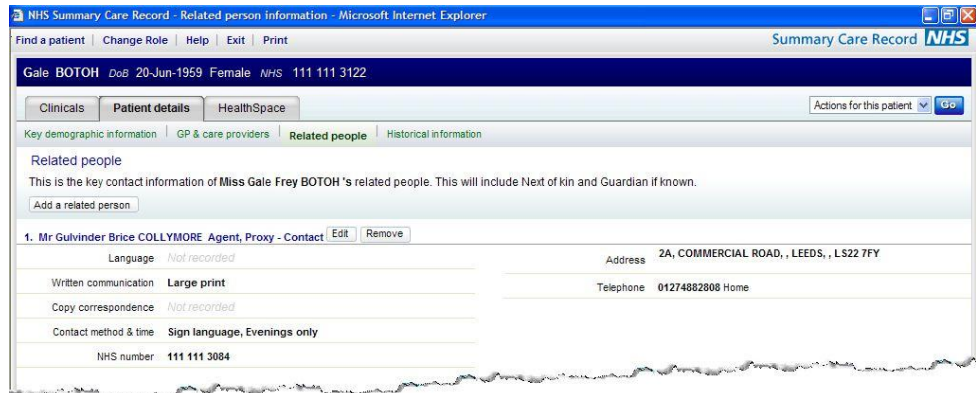
Figure 23 - Related people sub-tab

- Click the **Add a related person** button (if your role permits) to record another related person against the selected patient. (See section 9.4 Editing Related Person Information for further instructions).

- Click the related person's name hyperlink to view full details.

- Click any of the provided **Edit** buttons to amend the selected related person.

- Click any of the provided **Remove** buttons to delete the selected related person.

- Click any of the provided **Change Contact Order** buttons to re-order as necessary.

8.6 The Patient Details tab - Historical information

The Historical information sub-tab presents all changes that have been made to the Patient details of the selected patient.

1. Navigate to the **Patient details** tab.

    The **Key demographic information** screen is displayed.

2. Click the **Historical information** sub-tab.

Figure 24 - Related people sub-tab

- Click on any provided <u>hyperlink</u> to view further information.

9   Edit Demographics

If you have the appropriate permissions as part of your role profile you will be able to alter the demographic details of the patient. If the Edit and Add hyperlinks are visible you know that you are authorised to make changes.

As you amend any details the previous information is retained as historical information. You are able to make all patient changes, submit the update and generally the master record reflects these alterations immediately[1].

When you make changes to the patient record you save these changes by selecting the red **OK** button. Each time you will be presented with a **Confirm demographic edits** screen, which summarises the changes made and seeks confirmation to proceed with these amendments to the master record.

Warning: It is your responsibility to ensure that the changes are reviewed and correct before you click the **OK** button as incorrect details could impact patient care. When you believe that all details are correct you select the **Confirm changes** button to update the master record.

An **Interim** screen may display when your changes are being processed, when these are completed you return back to the **Patient details** tab. If the update is to take longer a confirmation that the update has been sent for later processing will be displayed.

9.1   Editing Name and Other Information

You can add, change or remove any patient name details with the appropriate permissions in your User Role Profile.

There are four name types: **Usual name, Preferred name, Alias** and **Other names**.

9.1.1   To Add a name

1.   Navigate to the **Patient details** tab.

        The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Name** section.

        The **Edit name** screen is displayed.

3.   Move to name type you wish to add.

4.   Click the **Add** button.

5.   Click the **PREFIX** drop down list and select.

        Note: If you select **Other** you need to complete the displayed text box with the patient's alternative prefix.

6.   Click into the **SUFFIX** field and complete.

7.   Click into each **NAME** field and amend/complete accordingly.

        Note: Fields that are marked with a red asterisk (*) and yellow background are mandatory fields.

---

[1] If the update is to the date of birth, given name or surname the update will not be immediate. A warning will be displayed to say the alteration could take longer, a confirmation update request is submitted and you confirm the successful completion of the update later.

8.   Type a date in the **EFFECTIVE FROM** field.

9.   Type a date in the **EFFECTIVE TO** field (this is not mandatory).

10.   Click the red **OK** button at the top of the screen to save changes.

        A **Confirmation** screen is returned.

9.1.2   To Edit an existing name

You are able to edit an existing name which is any of the four types. The original details will be stored as historical data "previous name of the type" and your entered details will be stored as the current data.

1.   Navigate to the **Patient details** tab.

        The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Name** section.

        The **Edit name** screen is displayed.

3.   Move to name type you wish to amend.

4.   Click the **PREFIX** drop down list and select.

        Note: If you select **Other** you need to complete the displayed text box with the patient's alternative prefix.

5.   Click into the **SUFFIX** field and complete.

6.   Click into each **NAME** field and amend/complete accordingly.

        Note: Fields that are marked with a red asterisk (*) and yellow background are mandatory fields.

7.   Type a date in the **EFFECTIVE FROM** field.

8.   Type a date in the **EFFECTIVE TO** field (this is not mandatory).

9.   Click the red **OK** button at the top of the screen to save changes.

        A **Confirmation** screen is returned.

9.1.3   To Add a future name change

The effective dates you record for future name changes must be in the future, they cannot be today or any date in the past.

1.   Navigate to the **Patient details** tab.

        The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Name** section.

        The **Edit name** screen is displayed.

3.   Click any of the following hyperlinks:

        Register a future usual name

        Register a future preferred name

        Register a future alias

4.   Complete the fields as necessary.

5.   Click the red **OK** button at the top of the screen to save changes.

        A **Confirmation** screen is returned.

9.1.4   To Remove a name that is no longer valid

You cannot remove the patient's usual name. You can only replace it with another name as a usual name is required.

1. Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2. Click the **Edit** button to the right of the **Name** section.

   The **Edit name** screen is displayed.

3. Click the <u>Remove</u> hyperlink next to the name to delete.

4. Click the red **OK** button at the top of the screen to save changes.

   A **Confirmation** screen is returned.

5. Click the **Confirm changes** button or select to make further changes using the **Hold changes and continue editing** drop down option.

Figure 25 - Sample confirmation screen displaying multiple alterations

9.1.5   To Edit Other Information

You have the ability to edit additional information such as birth details, contact preferences and informally record a death.

1. Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2. Click the **Edit** button to the right of the **Other Information** section.

   The **Editing demographic information** screen is displayed.

3. Complete any required fields as listed below.

Gender	NHS Number	Consent status

Birth Details		Contact Preferences		Death Notification	
	Date of birth		Language		Informal death notification
	Time of birth		Interpreter required		Death registration status
	Town of birth		Written communication		
	County/Province		Contact method		Date of death
	Country of birth		Contact time		Time of death

9.2   Editing Addresses

> You can add, change or remove any patient address details with the appropriate permissions in your User Role Profile.
>
> There are four address types: **Usual, future, temporary** and **correspondence**. A patient must have a usual address, like they must have a usual name.

9.2.1   To Add an address - postcode known

1.   Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Address** section.

   The **Edit addresses overview** screen is displayed.

3.   Move to address type you wish to add.

4.   Click the **Add** button if no address exists for that chosen type, otherwise ignore this step.

5.   Click the radio button next to **Enter a new xxx address**
   (where xxx is usual, temporary or correspondence).

6.   Click into the **POSTCODE** field and complete.

7.   Click the Find UK address hyperlink.

   Matched addresses are displayed.

   Note: If the right address is not returned, ensure that the entered postcode is correct otherwise attempt to enter the details manually.

8.   Click on the correct address in the displayed list.

   The **Confirm address changes** screen is displayed.

9.   Click the red **OK** button at the top of the screen to save changes.

   A **Confirmation** screen is returned.

9.2.2   To Add an address - postcode unknown

1.   Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Address** section.

   The **Edit addresses overview** screen is displayed.

3.   Move to address type you wish to add.

4.   Click the **Add** button if no address exists for that chosen type, otherwise ignore this step.

5.   Click the radio button next to **Enter a new xxx address**
   (where xxx is usual, temporary or correspondence).

6.   Click the Don't know UK postcode hyperlink.

   The postcode finder opens.

7.   Enter the address details that you have.

   Note: You must enter at least the postal town (line 4) with either the house/building name or number (line 1) and street (line 2).

8.   Click the **Find** button.

        Matched addresses are displayed.

9.   Click on the correct address in the displayed list.

        The **Confirm address changes** screen is displayed.

10.   Click the red **OK** button at the top of the screen to save changes.

        A **Confirmation** screen is returned.

9.2.3   To Add an address manually

Adding an address manually is the last resort. You should always attempt to find
the postcode to locate an address. If you cannot find the required address you can
click the Enter details manually hyperlink to enter an un-validated residence.
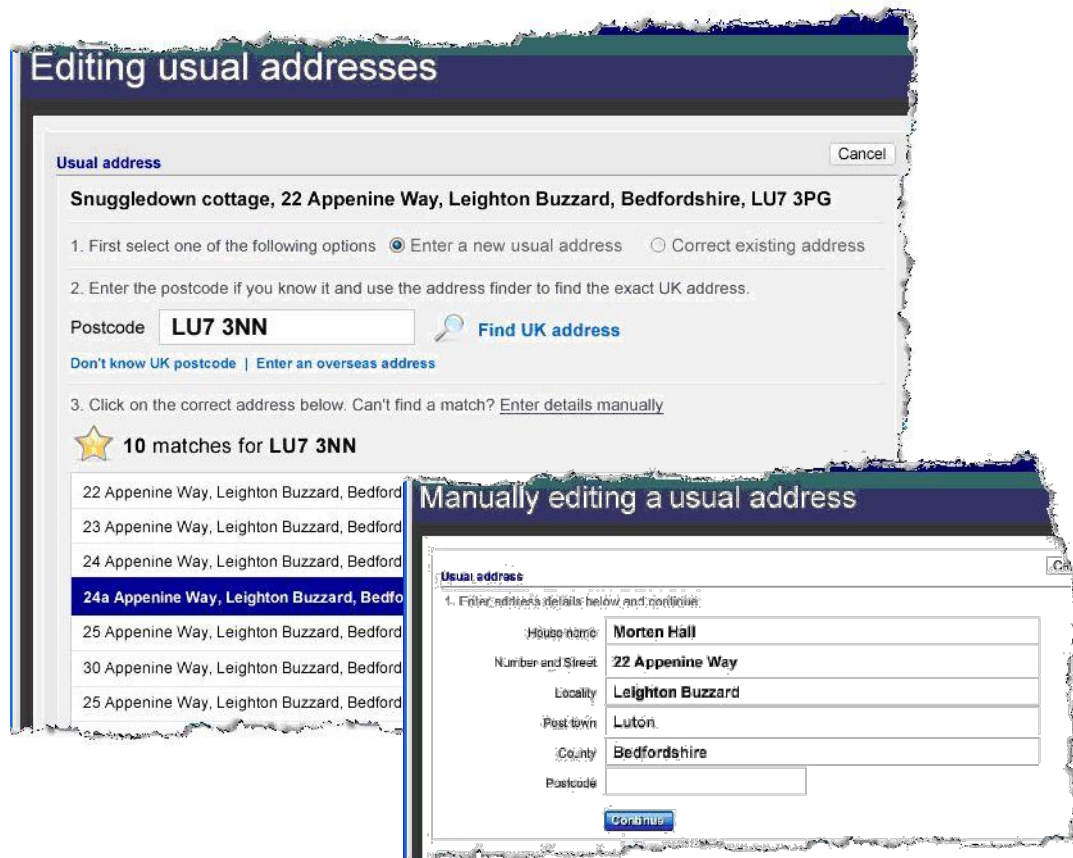
Figure 26 - Edit address screens - Enter details manually

9.2.4   To Add a foreign address

1.   Navigate to the **Patient details** tab.

        The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Address** section.

        The **Edit addresses overview** screen is displayed.

3.   Move to address type you wish to add as a foreign address.

4.   Click the Enter an overseas address hyperlink.

5.   Enter address details in the four **ADDRESS LINE** fields.

<u>Note</u>:   Address lines 1-3 should contain building identifier, street and locality and line 4 should hold the postal town and/or state province. Line 4 is a mandatory field.

6.   Click the **COUNTRY** drop down list and select.

7.   Click the **Continue** button.

8.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.2.5   To Record no fixed abode

If the patient has no usual address you can record their address as **No fixed abode**.

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Address** section.

The **Edit addresses overview** screen is displayed.

3.   Click the <u>No fixed abode</u> hyperlink against the **Usual address**.

The screen displays that No fixed abode has been selected.

4.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.2.6   To Edit an address

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2.   Click the **Edit** button to the right of the **Address** section.

The **Edit addresses overview** screen is displayed.

3.   Move to address type you wish to amend.

4.   Click the radio button next to **Correct existing address**.

5.   Use either the <u>Find UK address</u> hyperlink if a postcode is provided

Or

Click the <u>Don't know UK postcode</u> hyperlink.

6.   Search and select the correct address in the returned list.

The **Confirm address changes** screen is displayed with an **Effective from** date.

7.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.2.7   To Remove an address

You cannot remove the patient's usual address; you can only replace it with another address as a usual address is required.

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2. Click the **Edit** button to the right of the **Address** section.

   The **Edit addresses overview** screen is displayed.

3. Click the Remove hyperlink next to the address to delete.

4. Click the red **OK** button at the top of the screen to save changes.

   A **Confirmation** screen is returned.

9.2.8 To Add a Temporary address

Adding a temporary address follows the same steps as adding an address with or without a postcode, manually adding an address or adding an overseas address. The only additional information that is required is to capture the effective from and to dates and the type of address this temporary location is.

1. Add the address using any of the previously stated methods.

2. Type a date in the **EFFECTIVE FROM** field.

3. Type a date in the **EFFECTIVE TO** field (this is not mandatory).

4. Click the **TYPE** drop down list and select.

5. Click the **Continue** button.

6. Click the red **OK** button at the top of the screen to save changes.

   A **Confirmation** screen is returned.

9.3 Editing Contact Information

You can add, change or remove any patient contact details with the appropriate permissions in your User Role Profile.

Contact details are grouped under four headings; Telephone, Email, Fax and Text phone. You can manipulate elements within each heading then save all the changes or save as you go through each heading.

9.3.1 To Add/Edit/Delete Telephone details

1. Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2. Click the **Edit** button to the right of the **Contact information** section.

   The **Editing contact information** screen is displayed.

Figure 27 - Editing contact information screen

3.   Click into the relevant **TELEPHONE** field(s) and complete.

        Ensure any validation rules are met; numbers must be a minimum of 10 characters and can include brackets and plus signs.

4.   Click into the effective **FROM** and **TO** dates field and complete.

        Note: For a temporary telephone number specify an end date.
                 For all future telephone numbers specify a future from date.

5.   Click the Clear hyperlink to the right of an entry to remove.

9.3.2   To Add/Edit/Delete Email details

        Beneath the **Telephone** section are the **Email** contact details.

6.   Click into the relevant **EMAIL** field(s) and complete.

        Ensure any validation rules are met; email addresses must be a minimum of 7 characters, not include spaces and are not case sensitive.

7.   Click the Clear hyperlink to the right of an entry to remove.

9.3.3   To Add/Edit/Delete Fax details

        Beneath the **Email** section are the **Fax** contact details.

8.   Click into the **HOME** field and complete.

9.   Click into the **WORK** field and complete.

10.   Click the Clear hyperlink to the right of an entry to remove.

9.3.4   To Add/Edit/Delete Text phone details

        Beneath the **Fax** section are the **Text phone** contact details.

11.   Click into the relevant **TEXT PHONE** field(s) and complete.

12.   Click the Clear hyperlink to the right of an entry to remove.

13.   Click the red **OK** button at the top of the screen to save changes.

        A **Confirmation** screen is returned.

9.4   Editing Related Person Information

> You can add, change or remove any patient contact details with the appropriate permissions in your User Role Profile.
>
> You are able to add a related person, change the order they appear in the contact list - hence creating a ranked list and indicate who is the next of kin for the patient.
>
> A related person can be linked or not linked by NHS Number. In this application you cannot edit the personal details of a related person who is linked by NHS Number however you can edit their relationship to the patient, contact order, next of kin status and whether they should receive copy correspondence.

9.4.1   To Add a new related person

1. Navigate to the **Patient details** tab.

    The **Key demographic information** screen is displayed.

2. Click the **Related people** sub tab option.

    The **Related persons** screen is displayed.

3. Click the **Add a related person** button.

    The **Add a related person** screen is displayed.

4. Complete all fields as required.

5. Click the **Continue** button.

6. Click the red **OK** button at the top of the screen to save changes.

    A **Confirmation** screen is returned.

9.4.2   To Edit a related person

> Editing a related person can be access in one of two ways.

1. Navigate to the **Patient details** tab.

    The **Key demographic information** screen is displayed.

2. Click the **Related people** sub tab option.

    The **Related persons** screen is displayed.

3. Click the **Edit** button next to the appropriate person.

4. Then move to step on to step 5.

    Or

5. Navigate to the **Patient details** tab.

    The **Key demographic information** screen is displayed.

6. Click the **Related people** sub tab option.

    The **Related persons** screen is displayed.

7. Click the **Change contact order** button.

    The **Editing related persons overview** screen is displayed.

8. Click the **Edit** button next to the appropriate person.

    The **Editing related person details** screen is displayed showing the current details.

9. Amend any or all fields as necessary.

10.   Click the **Continue** button.

11.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.4.3   To Edit the contact order

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2.   Click the **Related people** sub tab option.

The **Related persons** screen is displayed.

3.   Click the **Change contact order** button.

The **Editing related persons overview** screen is displayed.

Figure 28 - Editing related persons overview screen

4.   Click a **Contact order up** or **down** arrow to move a person within the list.

You can also Edit, Remove and change the Next of kin status before accepting all changes.

5.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.4.4   To Remove a related person

1.   Navigate to the **Patient details** tab.

The **Key demographic information** screen is displayed.

2.   Click the **Related people** sub tab option.

The **Related persons** screen is displayed.

3.   Click the **Change contact order** button.

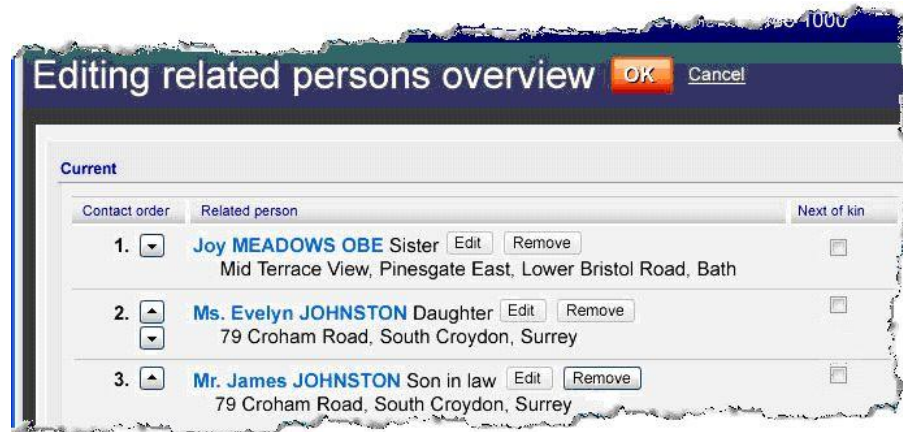The **Editing related persons overview** screen is displayed.

4.   Click the **Remove** button to the right of the related person's name.

5.   Click the red **OK** button at the top of the screen to save changes.

A **Confirmation** screen is returned.

9.4.5   To change the Next of kin status

> The **Next of kin** status appears on two screens (**Editing related person details** and **Editing related persons overview**). You can use either to change the status of the related person, these instructions refers to the later screen.

1. Navigate to the **Patient details** tab.

   The **Key demographic information** screen is displayed.

2. Click the **Related people** sub tab option.

   The **Related persons** screen is displayed.

3. Click the **Change contact order** button.

   The **Editing related persons overview** screen is displayed.

4. Click the **Next of kin** checkbox next to the appropriate person.

5. Click the red **OK** button at the top of the screen to save changes.

   A **Confirmation** screen is returned.

10   Appendix One - Quick Reference Guides

Quick Reference Guides are provided for you to use as handy, compact reference tools. Use as individual pages within this User Guide or divide out and keep separate on your desk.

The Quick Reference Guides enclosed relate to using the Spine Portal and maintenance of your Smartcard:

- Self Certification and Passcodes Renewal

- Fallback Authentication

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Self Certification and Passcodes Renewal

SMARTCARD CERTIFICATE RENEWAL

Two certificates were written to your Smartcard when it was created. These certificates need to be renewed every two years.

As with your Passcodes, these certificates are checked every time you log on to the Spine Portal. If your certificates are about to expire and fall within the notification period, the screen will display a message stating that your Smartcard is going to expire and offers you the option to renew it now (Yes) or later (No). If you choose to renew later, you are returned to the Spine Portal home page and can continue working within the Spine applications.

If you select Yes you will be taken to the Self Service Portal and the home page is displayed.

⚠️ Warning: Once the Certificates have expired, you have to contact your local RA personnel who will issue you a new Smartcard.
You are able to self renew your certificates twice, after that the system will advise you to contact your local RA personnel.
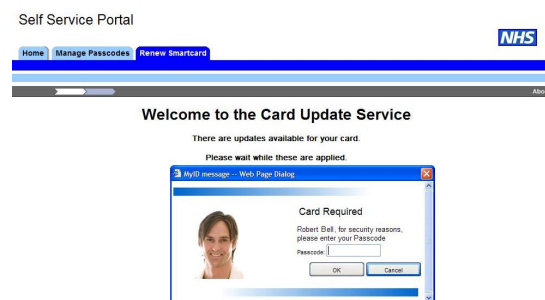
To Renew your Smartcard

You have logged on to the Spine Portal and have been requested to renew your Smartcard.

1. Click **Yes** when prompted to renew your Smartcard.
   The Self Service Portal opens.
2. Select the **Renew Smartcard** tab.
   You will be presented with **Update My Card** workflow.

3. Enter your Smartcard Passcode to confirm your identity and the first certificate update.
4. Click the **OK** button.

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The screen will display a message stating that it is "Applying update 1 of 2".

Creating Card and **Writing Certificates** warnings appear one after another.

You are advised that the card is being updated and please wait. When the first certificate has been renewed a confirmation is returned.

The system will renew the second certificate in the same way and display the **Update My Card operation completed** message.

5. Click the **Continue** button to confirm the update.

You will then be advised to close your browser and login again.

⚠ Warning: If the second certificate is not renewed you could have problems accessing the NHS Care Records Service.

PASSCODE(S) RENEWAL

When you were registered to use the Spine, you were requested to enter three Passcodes:

- **Account Recovery Passcode**. This is used to authenticate a user when requesting assistance from either the RA personnel or the Spine Helpdesk.
- **Verification Passcode**. This is used to identify a user when requesting assistance from the Choose and Book Helpdesk.
- **Smartcard Passcode**. The combination of Smartcard and Passcode ensures that access to the NHS Care Records Service (NHS CRS) is controlled and secure.

These Passcodes are automatically checked every time you log on to the Spine Portal. After a period of time you will be notified to renew one, two or all three of the Passcodes.

If when you log on to the Spine, one of your Passcodes falls within the thirty days notification period, the screen will display a message giving you the option to renew it now (Yes) or later (No). If you choose to renew later, you are returned to the Spine Portal home page and can continue working within the Spine applications.
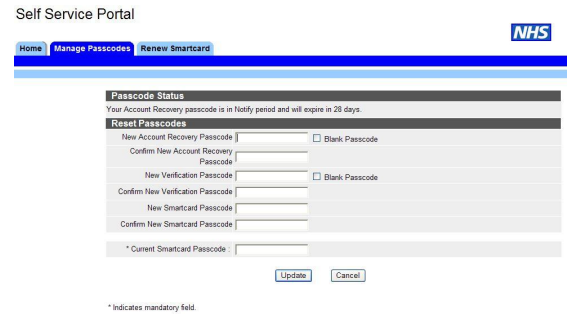
To Renew your Passcode(s)

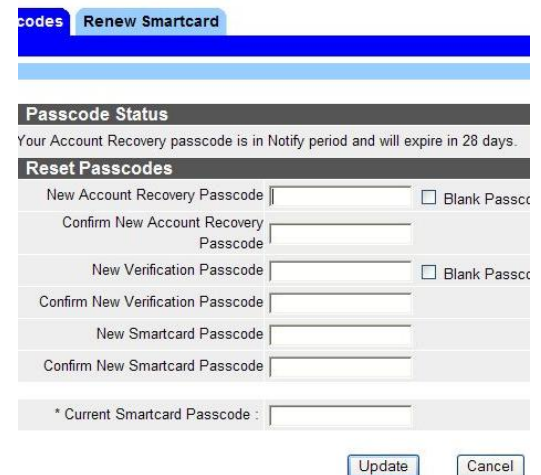You have logged on to the Spine Portal and have been requested to renew your Passcode(s).

1. Click **Yes** when prompted to renew your Passcode(s).

The Self Service Portal opens.

2. Select the **Manage Passcodes** tab.

The Passcode Status panel will state which Passcodes require renewal.

3. Enter and reconfirm new Passcodes against those that require updating.

4. Enter your current Smartcard Passcode against the **CURRENT SMARTCARD PASSCODE** field to confirm your identity.

5. Click the **Update** button to complete.

A message will be displayed on screen saying "Your Smartcard is being verified. Please wait....." Finally a confirmation message is displayed and will ask you to authenticate to the Spine Portal.
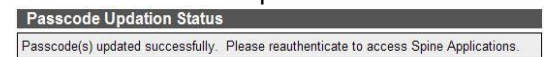
⚠ Warning: You can choose the **Blank Password** checkbox for both the Account Recovery and Verification Passcodes. If you make this choice you cannot use their associated service.

A "blank" Account Recovery Passcode means that Fallback Authentication is not possible and the Verification Passcode being "blank" impacts your Choose and Book assistance.

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Fallback Authentication

INTRODUCTION

A Fallback Smartcard is a temporary card held by local custodians and lent to users when their Smartcard is not available. Before a Fallback Smartcard can be used it has to be assigned to the user. This is done by accessing the Smartcard Service Centre (SCSC) which is a secure web based application.

For security reasons, the system will generate a One Time Passcode and send it either by email or SMS (text).

The Fallback Smartcard will take on all the attributes of your original card and the system will continue to audit your usage of the Spine. If the temporary card is because your Smartcard is lost, damaged or stolen, you will need to contact your local RA personnel for a new Smartcard. If you have forgotten your Smartcard, the system will suspend your original card until the Fallback Smartcard expires or you return it.

The Smartcard Service Centre has three major functions:

- Assigning a Fallback Smartcard.
- Returning (un-assigning) a Fallback Smartcard.
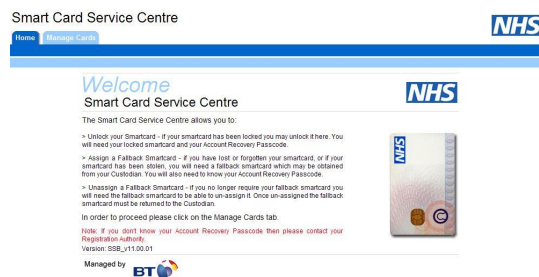- Unlocking a Smartcard.

⚠ Warning: Fallback authentication will only be available to users who have set an Account Recovery Passcode.

ASSIGN A FALLBACK SMARTCARD

Once you have visited your local custodian and collected a Fallback Smartcard and URL (web) address complete the following steps.

1. Launch the provided URL in a browser window.

2. Insert the Fallback Smartcard into the card reader.

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Please insert your NHS Smartcard into the card reader.
Note: If you are prompted to enter your passcode when you insert your Smartcard into the card reader please select the No option.

3. Click on the **Manage Cards** tab.

4. Enter your **UUID** in the USER'S UNIQUE IDENTIFIER field.
5. Enter your **surname** in the FAMILY NAME field.
6. Enter your **Account Recovery Passcode** where prompted.
7. Click the **OK** button.

   You are then asked how you would like to receive your time limited "One Time Passcode".

8. Select either the Email or SMS radio button.
9. Click the **OK** button.
10. Enter the received One Time Passcode in the ONE TIME PASSCODE field.

11. Select an appropriate choice from the **Reason for Needing Fallback Smartcard**.

    You can choose Forgotten, Lost, Stolen or Broken card.

    ⚠ Warning: If the card has been Lost or Stolen you must inform your RA Personnel who will block the Smartcard.

12. Click the **OK** button.

    The fallback card will be identified.
13. Click the **OK** button to continue.
14. Enter a new Passcode in the NEW PASSCODE field.
15. Enter the Passcode again in the CONFIRM PASSCODE field.
16. Click the **Unlock** button.

    An Unlock Card operation completed message will be displayed.
17. Click the **Continue** button.

Finally a confirmation message is displayed to confirm you have successfully assigned a Fallback Smartcard and when it is valid until.

18. Click the **OK** button.

UNASSIGN A FALLBACK SMARTCARD

1. Launch the provided URL in a browser window.
2. Insert the locked Smartcard into the card reader.
3. Click on the **Manage Cards** tab.
4. Click the **OK** button to unassign the Smartcard.
5. Click the **OK** button to recognise that you need to hand the card back to its Custodian.

UNLOCK YOUR SMARTCARD

1. Launch the provided URL in a browser window.
2. Insert the locked Smartcard into the card reader.
3. Click on the **Manage Cards** tab.
4. Enter your **UUID** in the USER'S UNIQUE IDENTIFIER field.
5. Enter your **surname** in the FAMILY NAME field.
6. Enter your **Account Recovery Passcode** where prompted.
7. Click the **OK** button.

   You are then asked how you would like to receive your time limited "One Time Passcode".

8. Select either the Email or SMS radio button.
9. Click the **OK** button.
10. Enter the received One Time Passcode in the ONE TIME PASSCODE field.
11. Click the **Unlock Card** button.

    Your card will be identified.
12. Click the **OK** button.
13. Enter a new Passcode in the NEW PASSCODE field.
14. Enter the Passcode again in the CONFIRM PASSCODE field.
15. Click the **Unlock** button.

    An Unlock Card operation completed message will be displayed.
16. Click the **Continue** button.
17. Click the **OK** button.

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Notes

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