

Medical records movement

A guide for general practice staff to the new process

1. Receiving records
2. Sending records
3. Returning temporary resident forms



What's changing?

- You will now receive a unique tracking label for each record requested from your practice
- You will need to match the tracking label with the relevant medical record and affix the right-hand label to the front of the shipping bag
- Shipping bags will be collected by CitySprint on your usual collection and delivery day, but CitySprint will now scan the label so the record can be tracked
- Records will also be scanned on delivery to your practice, which will update the tracking on the PCSE portal
- Records collected from your practice will be delivered directly and securely to their new practice or into storage if a patient is not currently registered with a GP or deceased.

Important

Before the new process begins it is important that you check your clinical system and release any records that have already been deducted.

Receiving records: Four steps to receiving medical records

If a patient registers at your practice, their paper medical record will need to be moved from their previous GP practice to yours, or a new medical record envelope will need to be created if they are a baby or new to the NHS.



1 Register a new patient using your existing local clinical system

The creation or movement of a medical record is triggered by the registration of a patient using your existing local clinical system.

New NHS patient

If the registration is for a new patient to the NHS, then a new medical record envelope for the patient will be created and delivered to your practice with your usual CitySprint records collection and delivery. After registering a new patient, the medical record envelope will typically arrive within 10 working days.

Medical record envelopes for new patients will arrive batched in a single, sealed, non-windowed envelope, bag or box, depending on the numbers being delivered to your practice.

Existing NHS patient

If the request is for an existing NHS patient moving to your practice, then the practice holding the record will receive a message as a deduction on their clinical system.

The practice holding the record should then accept the deduction on their clinical system. This acceptance will trigger the creation of a tracking label that will be sent to them on their usual CitySprint collection and delivery.

The practice holding the record will need to put the record in a shipping bag and attach the tracking label. The tracking label will be scanned by CitySprint when they collect the record from the practice so that the progress of the record movement can be tracked.



Track the progress of the record on the PCSE portal

All new patient registrations can be tracked on the portal. The portal will only show a full picture of all records movements once the new service is rolled out to all practices nationally.

Records will be scanned by the CitySprint driver on collection and delivery, and this will update the portal.

Status	Definition
Requested	PCSE has been notified of a new patient registration at your practice.
In progress	A tracking label has been printed and is on its way to the practice currently holding the record.
Pending validation or Pending further investigation	PCSE has been notified of a new patient registration at your practice. This movement request requires further investigation before it can be approved by PCSE and a tracking label created.
Collected	The record has been collected by CitySprint and is on its way to you – it will usually be delivered within 10 working days <u>from the point it is released</u> by the current practice or storage facility.
Delivered	The record has been delivered to your practice. Please note, once CitySprint has scanned the record on delivery to your practice, the record will no longer show on your 'Records in' page on the portal. You can still see a list of all records delivered to your practice by clicking on the 'Status' column in the 'Records in' page and then selecting 'Delivered'. If for any reason the status has not updated to 'Delivered', it is possible to change this yourself on the portal. To do this, please go to the 'Records in' page, click on the ID number link for the movement and click on 'In Storage at GP Practice'.

Please be aware that this new records movement process doesn't use the NHAIS system (Exeter) to track records. This means you won't receive a notification flag on your practice's clinical system to alert you that the records are on the way. Records can only be tracked using the portal.



Receive the record via CitySprint

Once the record has been released by the previous practice or from a storage facility, CitySprint will deliver the requested record to your practice on your usual collection and delivery day.

On delivery, the tracking label will be scanned by CitySprint to confirm the record has been delivered to your practice. This will update the tracking on the portal.

We recognise that different practices will follow their own protocols and there may be a requirement for you to update your local clinical system to show that the record has been received.



Dispose of the shipping bag

Shipping bags are 100% recyclable. Once you have removed the contents, the bag should be turned inside out and placed in your recycling waste.

What else do I need to know?

How do I make an urgent medical record request?

If you have an urgent clinical need to access information in a medical record, PCSE can facilitate contact between you and a patient's previous GP, to ensure the details needed get to the relevant clinician in good time.

If you would like us to facilitate the exchange of information between practices, please complete the urgent records request form, which can be downloaded from the 'GP Records' section of the PCSE website: www.pcse.england.nhs.uk.

Please only use this form if your request is clinically urgent, or if the request is in relation to adoption; gender re-assignment; witness protection; or a safeguarding investigation.

Completed forms should be emailed to: PCSE.enquiries@nhs.net from an nhs.net email address. Please put 'Urgent record request' in the email subject line. We can then arrange for the patient's previous GP to fax or email the clinically urgent information to your practice. We will also ask the practice to release the paper medical record in their next CitySprint collection, which will then arrive via the usual process in due course.

For information governance reasons, we can only accept and send emails containing patient information from nhs.net email accounts.

What do I do with records not meant for my practice?

If you receive a record you are not expecting, you can request a movement for these via the portal. Please go to the 'Request movement' section of the portal and complete the information required. A label for the record movement will be delivered to your practice.

Sending records:

Five steps to responding to medical record requests

If a current patient at your practice chooses to leave your practice and register with a new GP practice, then their paper medical record will need to be moved from your practice to the new one.

1 Accept the deduction

The movement of a medical record out of your practice is triggered through the registration of a current patient of yours at a new practice.

A deduction request will then appear on your clinical system. Once you accept the deduction, the medical record request will be added to the list of outbound records requests from your practice, which you can view on the PCSE portal.

2 Receive a tracking label

CitySprint will deliver a unique tracking label for each requested record on your weekly collection and delivery day. Labels are provided in alphabetical order of patient's last name.



You will need to find the medical record for each requested patient, checking that the NHS number and the first and last name on the left-hand tracking label match those on the medical record.

The left-hand label contains updated patient information. This label should be affixed to the front of the medical record if the patient's details have changed, or disposed of securely if not.

Please note

The left-hand label must NOT be affixed to the shipping bag. If this happens, CitySprint will not be able to accept the record.

3 Place the medical record in a shipping bag

Each individual patient record must go into an individual shipping bag. Place all records for the patient in the same shipping bag.

You can order more shipping bags in the 'Supplies' section of the PCSE portal. There are three sizes of shipping bag available, so you can choose the most appropriate size for the record.

If the patient record is too large for even the biggest bag, you can use multiple shipping bags. To do this you should order additional tracking labels. Ordering a new label (whether it is for an extra-large record, or if the original label has been lost or damaged) can be done via the portal. Simply locate the record in the 'Records out' list and click on the record ID on the left. Select the number of additional tracking labels you require for the record and select 'Request label'. The label will be delivered with your usual CitySprint collection and delivery.



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Attach the right-hand side tracking label to the shipping bag

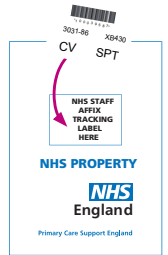
Every shipping bag has a box printed on it that says 'NHS Staff Affix Tracking Label Here.' That's where the right-hand tracking label goes.

Seal the shipping bag. The shipping bags will not be opened until they reach their final destination.

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CitySprint will collect the shipping bag

On your next CitySprint delivery and collection day, the CitySprint driver will scan and take away the bagged and labelled records. The driver will then deliver the record directly to the new GP practice or into long-term storage.



What else do I need to know?

What do I do with any remaining records or patient notes which were deducted before the new process began?

In the first few weeks following the introduction of the new service to your practice, CitySprint will collect labeled and unlabeled records. Please refer to the timetable you received with this guide for the date from which CitySprint will be unable to collect unlabeled records. From that date, if you hold any remaining records or patient notes which were deducted before the new process began, you will need to request a movement for these via the portal. To do this, go to the 'Request movement' section and complete the information required. A label for the record/additional notes movement will be delivered on your usual courier visit.

How do I return medical records of deceased patients?

To return a record for a deceased patient, you will need to deduct the patient on your clinical system. This will trigger the creation of a tracking label which will be sent to your practice on your usual CitySprint collection and delivery day.

You should then put the medical record in a shipping bag and stick the tracking label to the front, following steps 2 to 5 outlined in this section.

What do I do if I receive a tracking label I was not expecting?

There are circumstances where a tracking label could be generated and delivered to a practice where the full medical record is not held, for example if a patient registers at two practices in very quick succession. If you receive a label you are not expecting, please retain the label and contact the PCSE Customer Support Centre on 0333 014 2884. Select the 'Medical Records' option and we will provide guidance on what to do next. If you have any paperwork relating to the short period when the patient was registered at your practice, our agents will also advise on what to do with these.

Returning and receiving temporary resident forms

Submitting temporary resident forms (GMS3 forms)

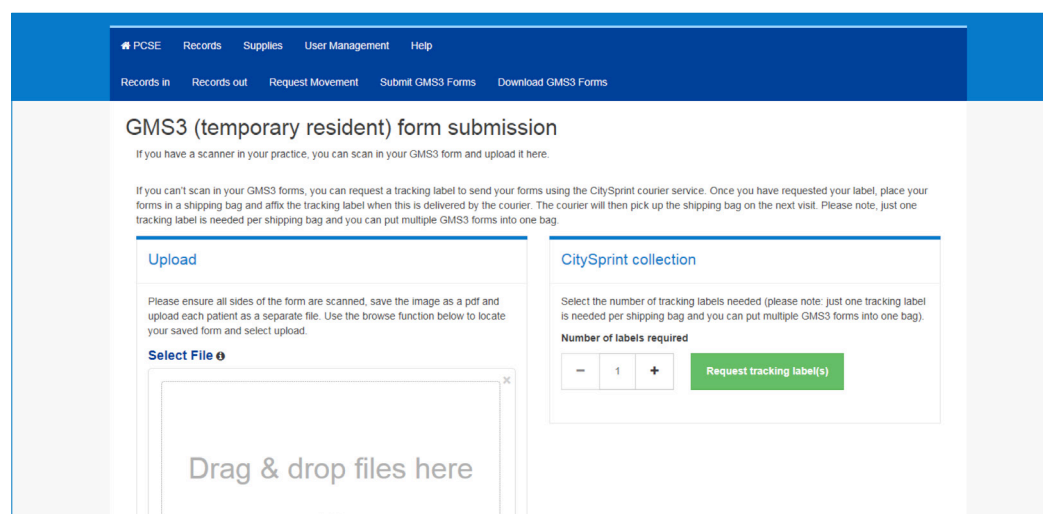
GMS3 forms can be scanned and uploaded to the 'Records' section of the portal by selecting 'Submit GMS3 Forms' on the screen header. The upload facility is on the left hand side of the page. Please ensure both sides are scanned. Save each patient form as a separate PDF file and include the patient's name in the file name.

Alternatively, if you do not have any facilities to scan the forms, you can request a label for GMS3 forms through the portal and send the forms in shipping bags. To order a label please:

1. Login to the portal.
2. Click 'Records' on the menu bar and then click 'Submit GMS3 Forms'.
3. On the right hand side, there will be a box called 'CitySprint collection'.
4. Select how many labels you would like by using the plus and minus buttons (*just one label is needed per shipping bag but you can put multiple GMS3 forms into one bag*).
5. Click the 'Request tracking label(s)' button.

The label(s) will then be delivered to you on your usual CitySprint collection and delivery day.

Please see a screenshot of this section of the portal below.



Receiving temporary resident forms

From September 2017, GP practices will receive completed GMS3 forms through the 'Records' section of the PCSE portal. Anyone in a practice with access to this section of the PCSE portal will be able to view, download and archive the forms.

When GMS3 forms are received, they join a list within the 'GMS3 Forms' section. Click on 'Download GMS3 Forms' to view the list of GMS3 forms received for your practice.

To download a completed GMS3 form, click on the 'Download' option next to each form and then print and store or file electronically in the patient's medical record.

All GMS3 forms received for download by your practice will remain visible on the list until they are archived by your practice. To archive a GMS3 form, select the 'Archive' option next to the form. This option will only become visible after the form has been downloaded for the first time. Please note that once a GMS3 form is archived by your practice, it will be removed from your GMS3 download list, and will no longer be accessible via the portal.

The main contact we hold for your practice will receive an email notification each time a new form is available for download from the portal. If you would prefer not to receive these notifications, you can opt out of them on the portal by selecting the 'Opt Out' button which can be found on the header of the GMS3 download page.

Further information and support

Frequently asked questions

The PCSE website is regularly updated with answers to frequently asked questions coming from practices. Please visit the 'Help' section of the PCSE website: www.pcse.england.nhs.uk.

Hands-on support

Our locally based National Engagement Team (NET), are here to provide practices with hands-on support as we introduce new arrangements for moving medical records.

If you would like further guidance on the new process, please contact your local NET representative. Their contact details can be found in the 'About' section of the PCSE website: www.pcse.england.nhs.uk.

General enquires

Please email us at: PCSE.enquiries@nhs.net, and put 'Medical records' in the email subject line, or call us on 0333 014 2884 and select option 1.