

Important information for practices National rollout of the new records movement service

Primary Care Support England

This bulletin has been emailed to the main contact we hold at your practice only. Please can you share with your colleagues in your practice.

NHS England and Primary Care Support England (PCSE) can confirm that the new records movement service will start to be rolled-out to all practices nationally. The new service should improve the process for all practices.

In this bulletin, you will find updates on:

- [How the service will be rolled out](#)
- [What will be different](#)
- [Benefits of the new process](#)
- [Lessons from the West Yorkshire pilot](#)
- [Findings from the medical record movement review](#)
- [Preparing for the new service](#)
- [What happens next](#)
- [The new urgent records request process](#)

How will the service be rolled out?

Following on from a comprehensive pilot in West Yorkshire and as a result of listening to practices in the area, the new service will be rolled-out in four phases across the country, starting in July 2017.

Phasing the rollout of the service will enable PCSE to carefully control the changes, and provide support to practices to enable the new process to embed as smoothly as possible.

The proposed phases are as follows:

- The North of England and East Midlands – the new process will be introduced July 2017
- West Midlands – the new process will be introduced around October 2017
- South East and London – the new process will be introduced around December 2017
- South West – the new process will be introduced around January 2018

*Roll out dates will be confirmed over the coming months.

Detailed updates will be provided to practices in each phase by email on how and when the new service will be introduced in their area. Please look out for these.

What will be different?

The new service has been introduced in stages. The first step was the introduction of a new weekly collection and delivery service for medical records. The many local courier arrangements that existed across England have been replaced with a single national courier provider, CitySprint. Over the last year CitySprint have improved the courier service by adding additional routes and using larger vans which has ensured consistency of the weekly service.

For the last year, practices should have been packing medical records individually in separate shipping bags ready for movement. The additional steps in the new process will be:

- Practices will receive a unique tracking label for each record requested from your practice
- Practices will need to match the tracking label with the relevant medical record and affix the 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
- Practices will be able to track the status of records you are awaiting via the PCSE portal
- 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. To further improve patient confidentiality and security, shipping bags will be securely sealed and not opened until they reach their final destination.

What are the benefits of this new process?

NHS England and PCSE recognise there have been a number of challenges since the start of this project. We would like to apologise for the service disruption practices and patients may have experienced as new processes embedded.

We are confident that as the full new service is rolled out nationally, practices will see the intended benefits:

- ✓ A more secure service which further ensures patient confidentiality
- ✓ Online tracking of record movements
- ✓ Improved time taken to move records between practices.

West Yorkshire pilot

Last year, NHS England and PCSE took the decision to extend the West Yorkshire pilot, in order to ensure that the information and feedback gathered could be carefully reviewed and considered.

This additional time and help from practices has ensured that the new service is proven, safe and effective, and has enabled us to make a number of improvements to the process. PCSE has learnt and implemented lessons from the pilot.

Lessons learnt

- Tracking labels will be printed in alphabetical order of patient last name rather than deduction date making it easier for staff to process
- The left-hand tracking label now contains updated patient information which can be affixed to the front of the medical record before you send it onto the next GP practice if the patient's details have changed
- Definitions of the tracking statuses are now provided on the portal
- Content on the portal has been improved to provide clearer guidance on key processes
- We have identified the need to make it explicit to all practices that the tracking information on the portal will only be complete once the service is rolled-out to all practices nationally
- More detailed communications and instructions will be provided to practices, to support them through the rollout of the service
- The scanning process has been improved by 'grouping' records to reduce the time taken to scan records on delivery to the destination practice
- We have introduced a facility on the portal for re-ordering labels if required.

Thank you to the West Yorkshire practices for working with PCSE and sharing your experiences of the new process.

Detailed records movement review and findings

Some practices have reported over the last year that they have not yet received medical records when expected.

With the help of stakeholders, including the BMA and NHS England, PCSE selected a number of representative practices, and performed a detailed analysis and investigation into every case where records were expected but had not yet been received by the practices.

Importantly, PCSE traced and located every record.

The review found that medical records were not with the practice as expected for the following reasons:

- 8% of the records were in transit between practices at the time of the analysis (and it was confirmed they were subsequently received)
- 21% were records that had been requested from, but not yet released to PCSE by legacy NHS England archive storage providers
- 38% were with the previous GP practice where the patient had been registered, and had not at that point been released to PCSE for transfer
- 28% were New Patient Registrations. Medical record envelopes for new NHS patients are now being delivered routinely with the CitySprint collections and delivery service
- For 5% there were explainable data discrepancies between the lists provided by the practices and the national systems – mostly, in the case of rapid successive patient transfers (e.g. where a patient registered with a practice but then quickly registered with another practice and the record was found to be at the correct final practice).

What can practices do to help?

The new records movement service is highly dependent on the timely release of records from storage facilities and GP practices.

NHS England is continuously looking at practical actions to accelerate the release of records from the archives.

In order to prepare for the introduction of this service, we would appreciate support from practices in checking that they have released records for all deducted patients since March 2016. We appreciate that many practices are extremely efficient at this, but analysis has found that there are requested records still with the previous GP practice in some cases. By clearing these records now, we will resolve the most common problem for practices which is waiting for outstanding records.

What can practices do to prepare for the new service?

- Please try logging into the [PCSE portal](#) to check that you have access to the records section of the PCSE portal, as you will need to use it as part of the new service
- Your portal password may have expired if you haven't used it for a while. You can reset your password by going to the 'Login' section of the [PCSE website](#) and clicking on the 'Forgotten your login details' link
- The main contact in your practice will be able to set up additional users for your practice by logging into the [PCSE portal](#), clicking on *User Management*, and selecting *create new user*. If you have any queries about the PCSE portal please email us at PCSE.portalenquiries@nhs.net
- Please release any remaining records you still may hold for deducted patients since March 2016.

What happens next?

Over the next few weeks, regular email updates will be sent to the main contact we hold for practices in phase one of the roll-out.

A range of printed materials will also be delivered, initially to practices in phase one, to help guide you through the new process and answer any queries you may have. These will also be delivered to practices in later phases closer to the date of introduction of the new service in your area.

If you have any further queries regarding the introduction of this new service, our National Engagement Team (NET) are here to help, and are available to attend practice meetings taking place in your area. Their contact details can be found at: www.pcse.england.nhs.uk/net.

Update on making urgent medical record requests

As shared in previous bulletins, a new urgent records request form has been produced, to provide clarity on the information PCSE needs to process requests. Using this form ensures the quickest possible response time to your urgent requests.

The form is available to download [from the PCSE website](#). Completed forms should be emailed from an nhs.net email address to: PCSE.enquiries@nhs.net with 'Urgent record request' in the email subject line. For information governance reasons, we can only accept and send emails containing patient information from nhs.net email accounts.

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.

Primary Care Support England