The SCR Audit – Identifying Unsent SCRs

Over time a practice may accumulate a set of created but unsent SCR messages for patients. There are various reasons for this, a consultation without a Smartcard, a deferred Core PDS mismatch and so on. In order to help practices identify patients in this state and thus ensure that the SCR available on the Spine is the most up-to-date, a combined audit and search have been created (commonly referred to as the 'SCR audit').

This package is downloaded from the INPS website and contains an audit, a search and these instructions. The audit looks for patients who potentially have a created but unsent summary, the search takes this and further refines the results by excluding patients who have only had non-face-to-face consultations since the upload has finished.

> **Note** - This should be done by staff familiar with the use of Clinical Audit and Search and Reports functionality.

Getting Started

You will need to:

- Download the components to a suitable location on your local system.
- Import the audit – this will run daily and creates a group for the search to use.
- Import the Search into Search and Reports.

Importing the Audit

1. To import the audit start the Clinical Audit program then select **File - Maintenance mode.**
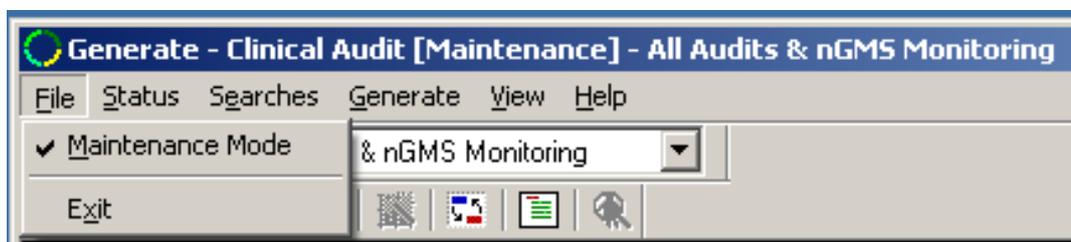
Clinical Audit – File – Maintenance Mode

2. Next select **Searches -Import Searches.**
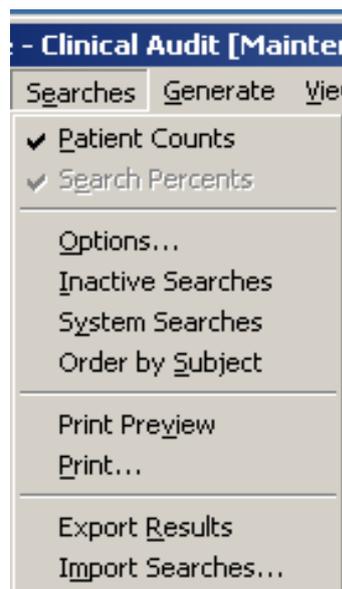
Clinical Audit - Searches menu – Import Searches

3. Select the Audit and click Import

4. The audit will appear like this before it has been run:
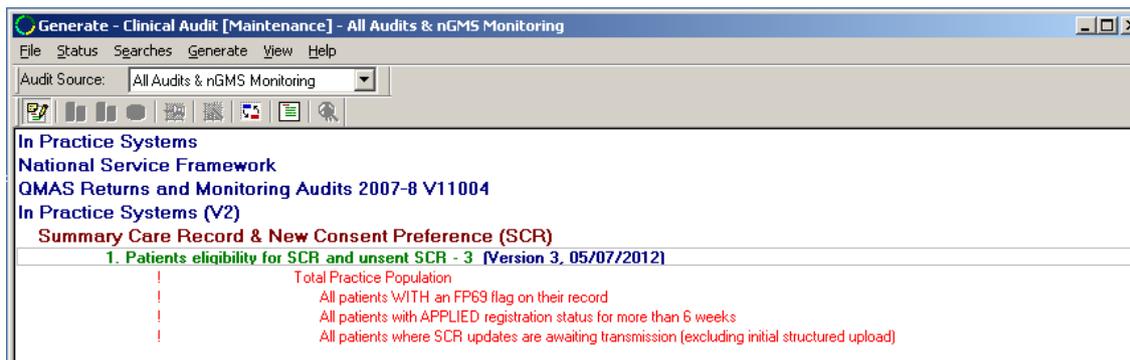
Clinical Audit – SCR Audit

Importing the Search

5. Next you need to import the search, this will appear in the 'ad hoc' searches area of search and reports – note the input group used by the search does not exist till the audit has been run. The audit is set to run as part of the overnight process.

6. To import the search go to the search export and import area, navigate to the location of the downloaded search then press OK, this will add the search to the import area. Select the search then right click on the search and click on import.
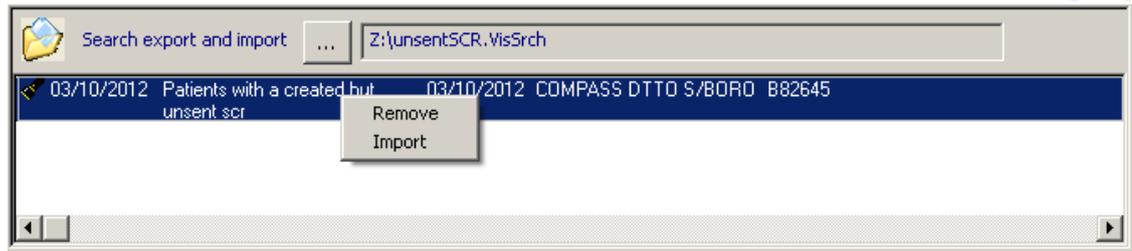
The search will now appear in the Ad-hoc Search & Reporting area:

7. Edit the 'consultations after' date to be the day that your initial upload finished. If you are unsure of this then set the date to the date that the initial upload was run (select 'Date of Consultation' then press the Selections button or right click then select selections).
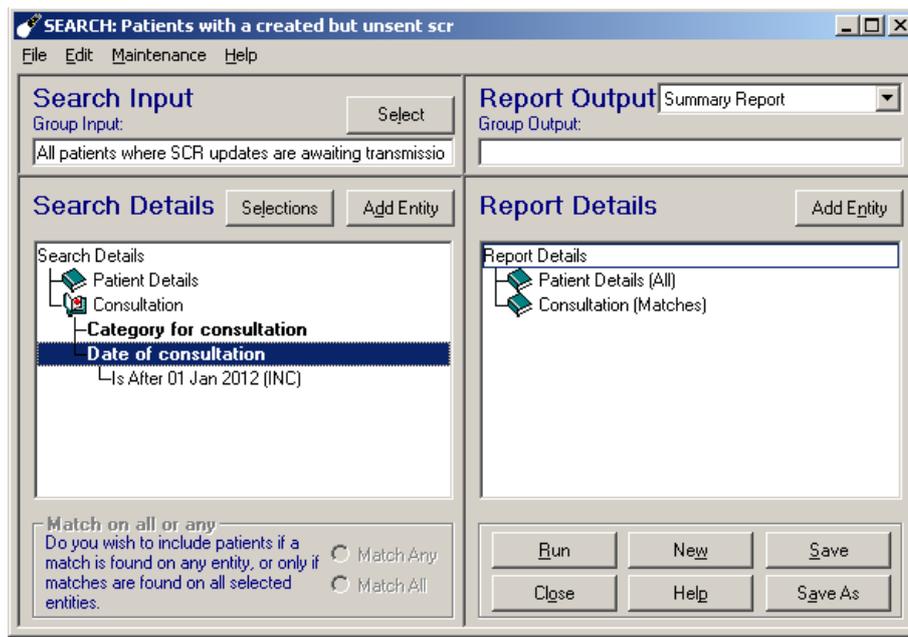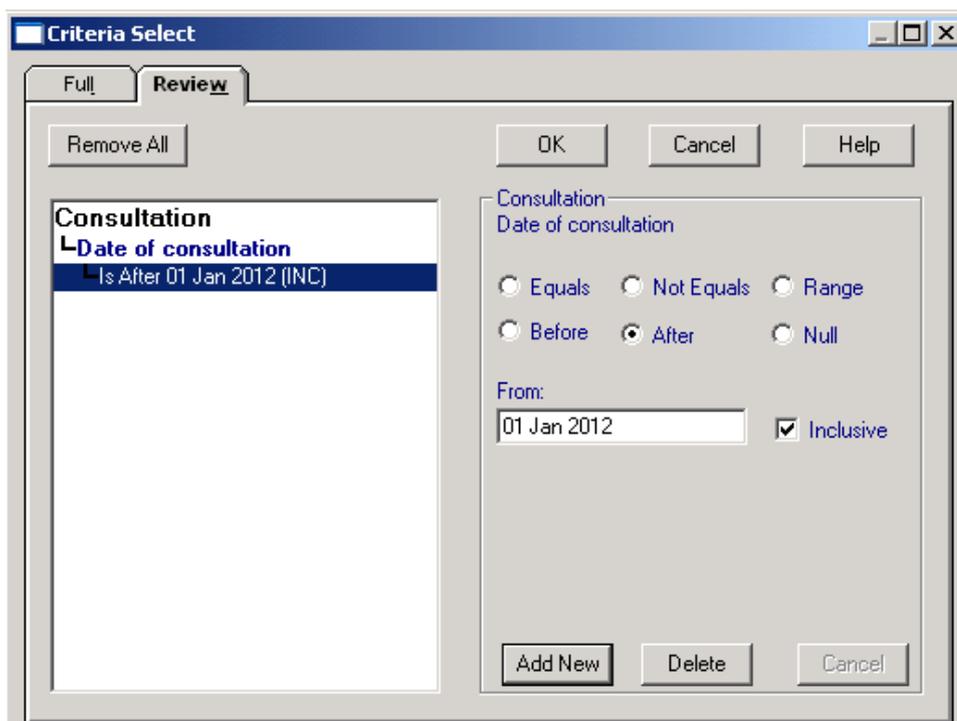
8. Before the search is run it may be necessary to update the search with the audit group. To do this open the search and click on Select in the search input area.
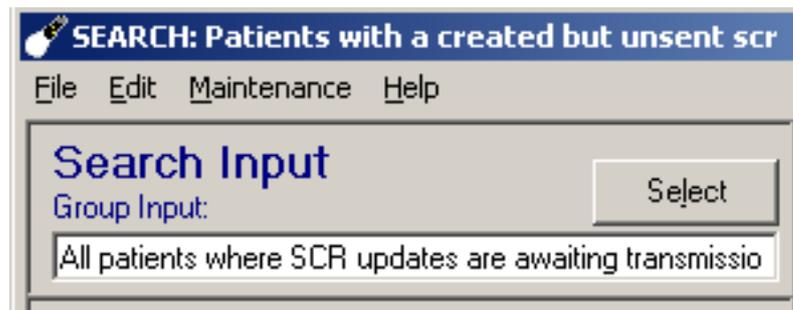
9. From the Clinical Audit Search tab select the line highlighted below then press OK.
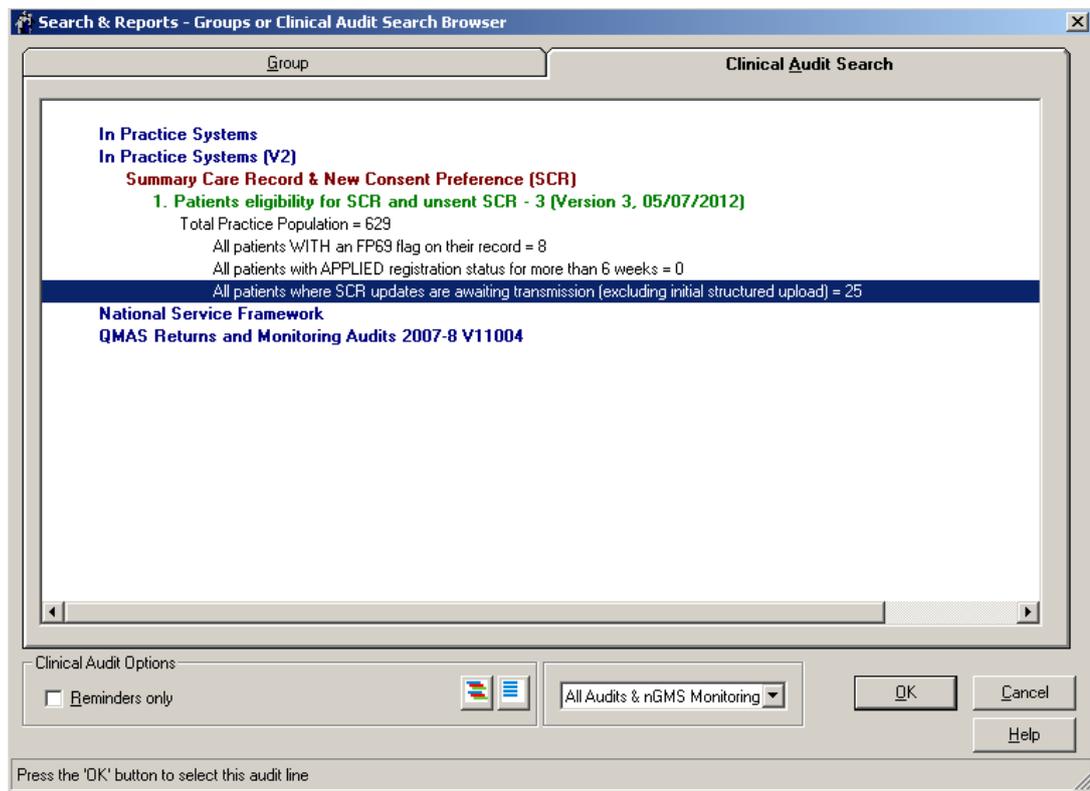
Note - No further interaction with the audit is required after it has been imported; all the work is done using the search.

10. Run the search to update the information. When creating the search you can generate a group which can be imported into Consultation Manager allowing a clinician (or other user with rights to update a patients SCR) to work through the list in an ordered fashion.

Housekeeping

The purpose of this activity is to ensure that patients have an up-to-date SCR available on the Spine. It is therefore recommended that practices make this a part of their regular housekeeping actives (ideally run and acted on once a week). This will not only ensure that up-to-date patient data is available but also that the list does not grow too big and hence keeps the workload to a minimum.