



Better informed means better care

Dorset Care Record brings all your health details together so medical and social care staff **can give you the best possible care**

How to add, edit, remove and reinstate Friends & Family members to a patient's Circle of Care in the DCR



For more information please visit:
news.dorsetcouncil.gov.uk/dcr-staff-area

How to add, edit, remove and reinstate Friends & Family members to a patient's Circle of Care in the DCR



This user guide will show you how to make changes to the **Friends & Family** category of a patient's **Circle of Care** in the **DCR**. The patient can also add, edit, remove and reinstate **Friends & Family** members to their **Support Network/Circle of Care** from their **myDCR** portal. This user guide will also show you **how to record the patient's consent for their clinician to share/discuss their medical/health and care information with selected Friends & Family members**.

It is important to note that the **Circle of Care** is an **UNMONITORED** service i.e. there will be no notifications to you or your patient of any changes or updates made to the patient's **Circle of Care**.

User Guide Content:

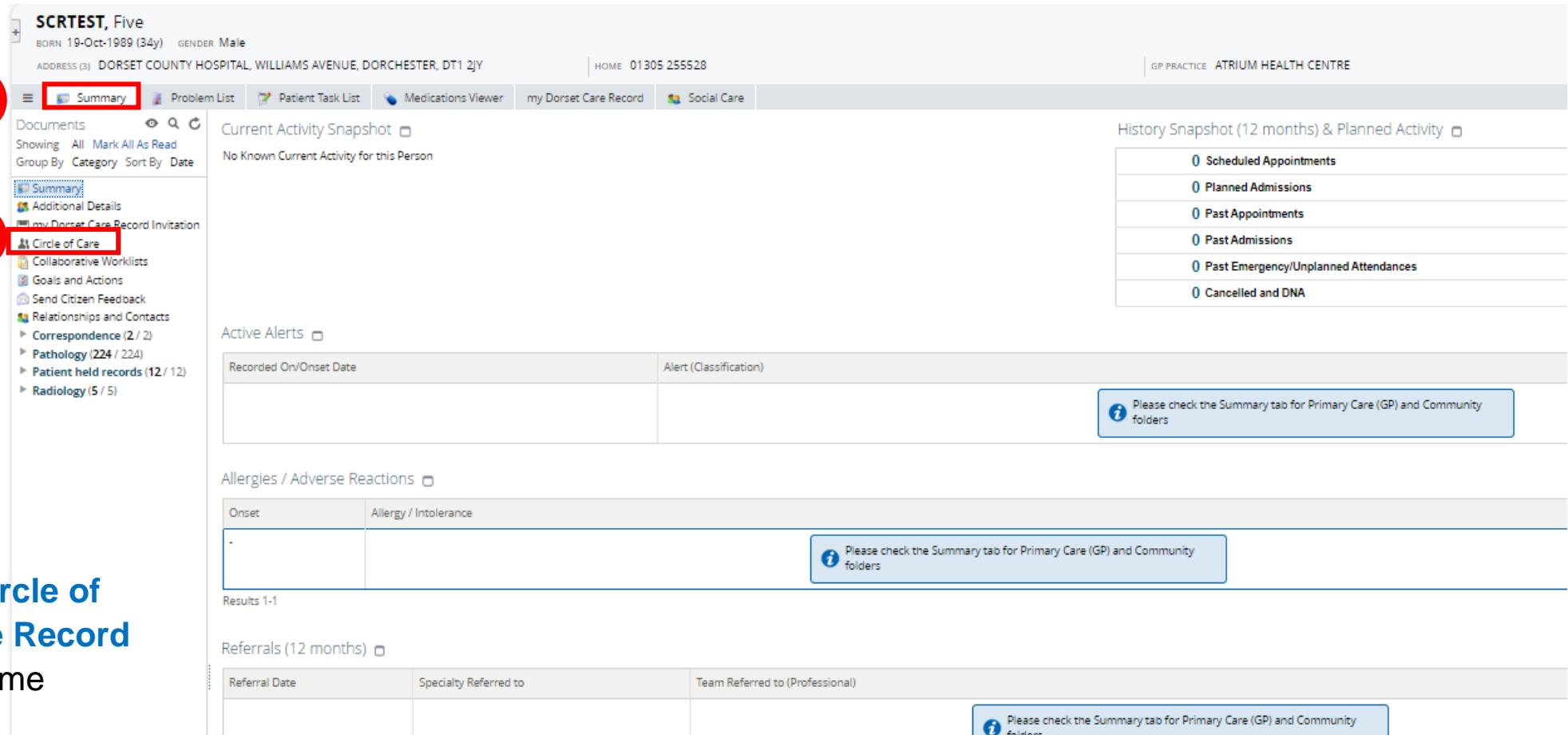
1. How to find the Circle of Care from the Summary tab or my Dorset Care Record tab
2. How the citizen sees the Circle of Care in myDCR under My Support Network
3. How to add a Friends & Family member to the patient's Circle of Care and record the patient's Consent to Share their health and social care information with this member
4. How to view the details for a Friends & Family member listed in the Circle of Care
5. How to edit and remove/deactivate a Friends & Family member from the Circle of Care
6. How to re-activate/reinstate a Friends & Family member who has previously been deactivated

There are additional User Guides at <https://news.dorsetcouncil.gov.uk/dcr-staff-area/how-to-guides/> to help you with **how to log in to the DCR** and how to record a **Discussion to View**, amongst many others.

1. Finding the Circle of Care from the Summary tab in the DCR

1 Access the citizen's DCR record either via single sign-on from the DCR tab/link within your current organisational system, or login via the DCR browser <https://prof.dorsetcarerecord.nhs.uk/concerto/Login.htm> and search for the patient. The patient record opens on the **Summary** tab.

2 Click on the **Circle of Care**.



SCRTEST, Five
 BORN 19-Oct-1989 (34y) GENDER Male
 ADDRESS (3) DORSET COUNTY HOSPITAL, WILLIAMS AVENUE, DORCHESTER, DT1 2JY | HOME 01305 255528 | GP PRACTICE ATRIUM HEALTH CENTRE

Summary | Problem List | Patient Task List | Medications Viewer | my Dorset Care Record | Social Care

Documents
 Showing All Mark All As Read
 Group By Category Sort By Date

Summary
 Additional Details
 my Dorset Care Record Invitation
Circle of Care
 Collaborative Worklists
 Goals and Actions
 Send Citizen Feedback
 Relationships and Contacts
 Correspondence (2 / 2)
 Pathology (224 / 224)
 Patient held records (12 / 12)
 Radiology (5 / 5)

Current Activity Snapshot
 No Known Current Activity for this Person

History Snapshot (12 months) & Planned Activity

0 Scheduled Appointments
0 Planned Admissions
0 Past Appointments
0 Past Admissions
0 Past Emergency/Unplanned Attendances
0 Cancelled and DNA

Active Alerts

Recorded On/Onset Date	Alert (Classification)

Allergies / Adverse Reactions

Onset	Allergy / Intolerance

Results 1-1

Referrals (12 months)

Referral Date	Specialty Referred to	Team Referred to (Professional)

Please check the Summary tab for Primary Care (GP) and Community folders

NOTE

You can also access the **Circle of Care** from **my Dorset Care Record** tab. They both show the same information.

Finding the Circle of Care from my Dorset Care Record tab

Click on **my Dorset Care Record**, and then click on the **Circle of Care**.

CHAMPION, Trevor (Mr)
 BORN: 04-May-1967 (56y) GENDER: Male
 ADDRESS (3): Dorset County Hospital, WILLIAMS AVENUE, Dorchester, DT1 2JY
 NHS Number: 491 167 7333 PDS: 4911677333
 GP PRACTICE: CANFORD HEATH GROUP PRACT

Summary | Problem List | Patient Task List | Medications Viewer | **my Dorset Care Record** | Social Care

my Dorset Care Record Invitation | Shared Files | myDCR Health Library Tags | myDCR Health Library | **Circle of Care** | Goals and Actions

Circle of Care

[Add](#) [Show Inactive \(20\)](#)

Name	Relationship	Role	Consent to Share	Contact Details
Ann Bryce	Granddaughter	Cares For Person	Yes	0123456789
Charles Aznavor	Friend	Next Of kin	No	01305 667889
Fred Champion	Cousin	Financial Representative	No	07983 111111
Gordon Thegofer	Family Member		Unknown	01305 678901
James Norton	Husband		No	07786456787
Jessica Rabbit	Daughter	Next Of kin	Yes	
Rocky EXPLORER	Child		Yes	01202 123456
Sam Bel	Neighbour	Key Holder	No	
Sammyj Bel	Carer	Emergency	Yes	
Susie Champion	Wife	Cares For Person	No	
Tabby McTat	Daughter	Emergency	Yes	

Care Team

Name	Role	Organisations	Contact Details
(nhs-sds)	Attending Provider		
Anna Green	Consulting Provider		441234567890
Barbara Zurek	Attending Provider		
Emma Walton	Attending Provider		
Georgina Hulbert	Attending Provider		07983 111111
Jayne Catley	Attending Provider		
Jayne Catley	Ordering Provider		
Laura Bonner	Consulting Provider		
Pelin Vilbat	Primary Care Provider		
Sam Belnomme	Attending Provider		
Theresa Barton	Midwife		

Organisations

Name	Type	Contact Details
Active Dorset	Other	

2. The Circle of Care in the DCR is mirrored in myDCR, under the patient's My Support Network

my Dorset Care Record Hi Trevor

Health Record

T Trevor Champion
04 May 1967

- My Appointments
- My Health Record >
- My Links >
- My Support Network**
- My Account

Circle of Care

[Add](#) [Show Inactive \(22\)](#)

Friends & Family



Name	Relationship	Role	Consent to Share	Contact Details
Fred Champion	Cousin	Financial Representative	No	07983 111111
Jessica Rabbit	Daughter	Next Of Kin	Yes	
Sam Bel	Neighbour	Key Holder	Yes	
Susie Champion	Wife	Cares For Person	No	

Care Team

Name	Role	Organisations	Contact Details
Barbara Zurek	Attending Provider		
Georgina Hulbert	Attending Provider		07983 111111
Pelin Yilbat	Primary Care Provider		
Sam Belhomme	Attending Provider		
Theresa Barton	Midwife		

Organisations

Name	Type	Contact Details
Active Dorset	Other	



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3. How to add a member to the Friends & Family category and record the patient's Consent to Share their health and social care information with this member



3 To add a member to the **Circle of Care**, click on **Add**.

You can add a member to the following categories:

1. **Friends & Family**,
2. **Care Team**, or
3. **Organisations**

NOTE

The patient can also add, edit or remove members from the **Friends & Family** category, but not from the **Care Team** and **Organisations**.

CHAMPION, Trevor (Mr)
BORN 04-May-1967 (56y) GENDER Male
ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorchester, DT1 2JY

NHS Number 491 167 7333
PDS 4911677333

GP PRACTICE CANFORD HEATH GROUP PRACT

Circle of Care

Add Show Inactive (21)

Friends & Family

Name	Relationship	Role	Consent to Share	Contact Details
Charles Aznavor	Friend	Next Of Kin	No	01305 667889
Fred Champion	Cousin	Financial Representative	No	07983 111111
Gordon Tnegofer	Family Member		Unknown	01305 678901
James Norton	Husband		No	07786456787
Jessica Rabbit	Daughter	Next Of Kin	Yes	
Marianne Dolby	Sister	Next Of Kin	Yes	
Rocky EXPLORER	Child		Yes	01202 123456
Sam Bel	Neighbour	Key Holder	No	
Sammyj Bel	Carer	Emergency	Yes	
Susie Champion	Wife	Cares For Person	No	
Tabby McTat	Daughter	Emergency	Yes	

Care Team

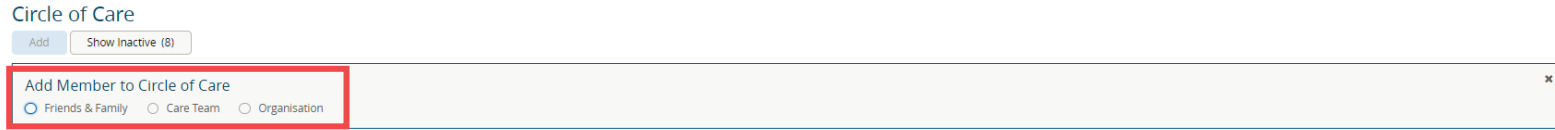
Name	Role	Organisations	Contact Details
(nhs-sds)	Attending Provider		
Anna Green	Consulting Provider		-441234567890
Barbara Zurek	Attending Provider		
Emma Walton	Attending Provider		
Georgina Hulbert	Attending Provider		07983 111111
Jayne Catley	Attending Provider		
Jayne Catley	Ordering Provider		
Laura Bonner	Consulting Provider		
Pelin Yilobat	Primary Care Provider		
Sam Belhomme	Attending Provider		
Theresa Barton	Midwife		

Organisations

Name	Type	Contact Details
Active Dorset	Other	
Ben TESTDCR	Hospital Department	
James Norton	Religious Institution	

How to add a member to the Friends & Family category and record the patient's Consent to Share their health and social care information with this member

3 Select the **Friends & Family** radio button.

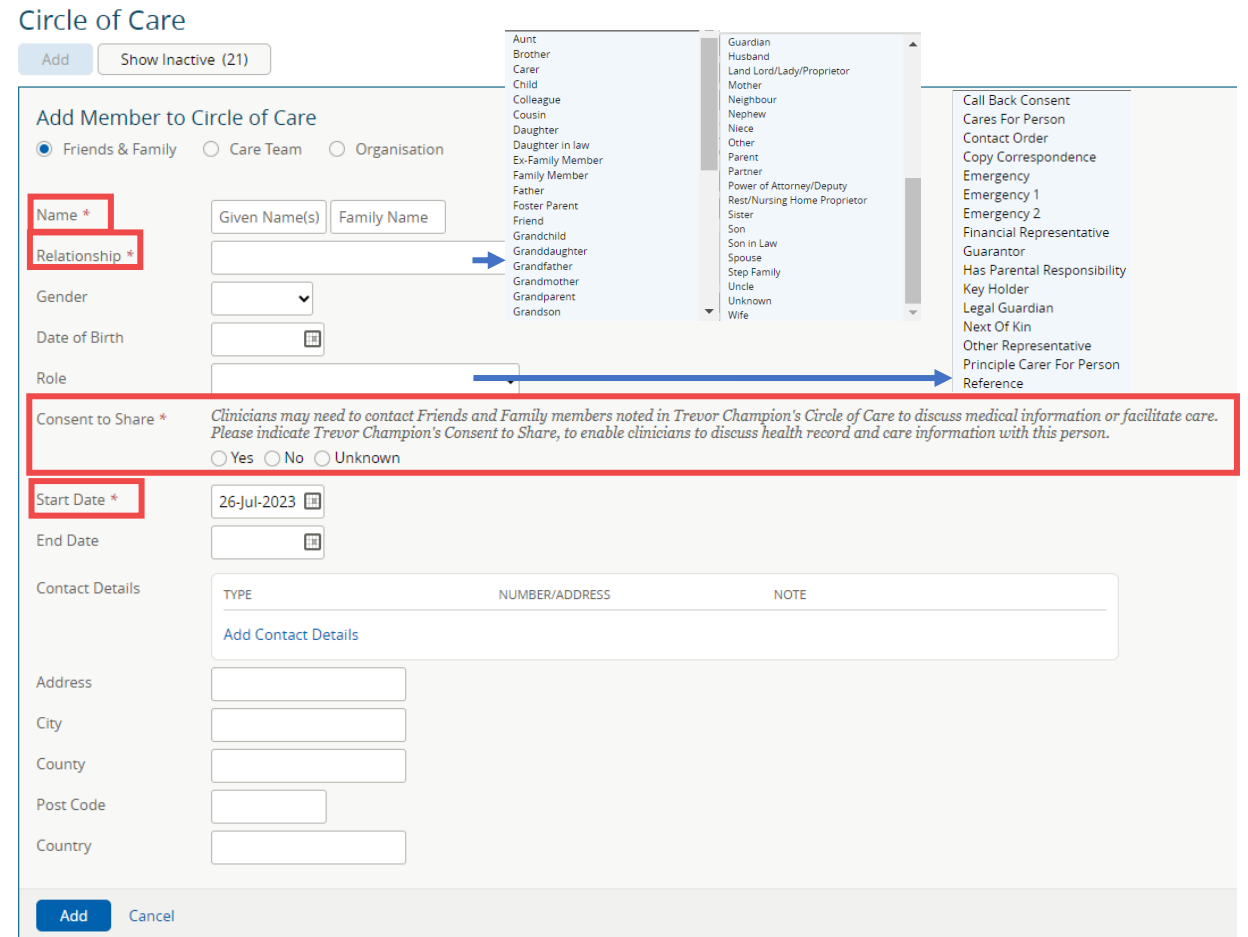


4 In the field that opens following the selection, fill in at least the fields marked with a **red Asterix**:

- Type in their **Name***,
- Select the **Relationship*** type from drop-down list,
- Select the relevant radio button for **Consent to Share***

The **Consent to Share** refers to the following: *Clinicians may need to contact Friends and Family members noted in (the patient's) Circle of Care to discuss medical information or facilitate care... (it) enables clinicians to discuss health record and care information with this person.*

The consent can be granted indefinitely, or for a defined, limited period, such as during a stay in hospital. The consent can also be removed at any time, either at the request of the patient or if ever a professional had any concerns.



How to add a member to the Friends & Family category and record the patient's Consent to Share their health and social care information with this member



If you have the patient's **consent** to discuss their health and care record information with their **Friends & Family**, then these members can also support the patient in their care and treatment.

For example,

- unpaid carers will be able to better support those they look after, or
- as Annemieke Fox, a Motor Neurone Disease advanced healthcare practitioner coordinator, states:

*'patients with motor neurone disease often have varying levels of disability which might make accessing their Dorset Care Record challenging for them, so the **Circle of Care** functionality, by which they can provide **consent** for others - for example their carers, family, friends and anybody else that they want to have access to their Dorset Care Record- will ultimately improve the care that patients receive'.*

How to add a member to the Friends & Family category and record the patient's Consent to Share their health and social care information with this member

4 Select the **Start Date*** for when the Friends & Family member to start being an active member in the patient's Circle of Care.

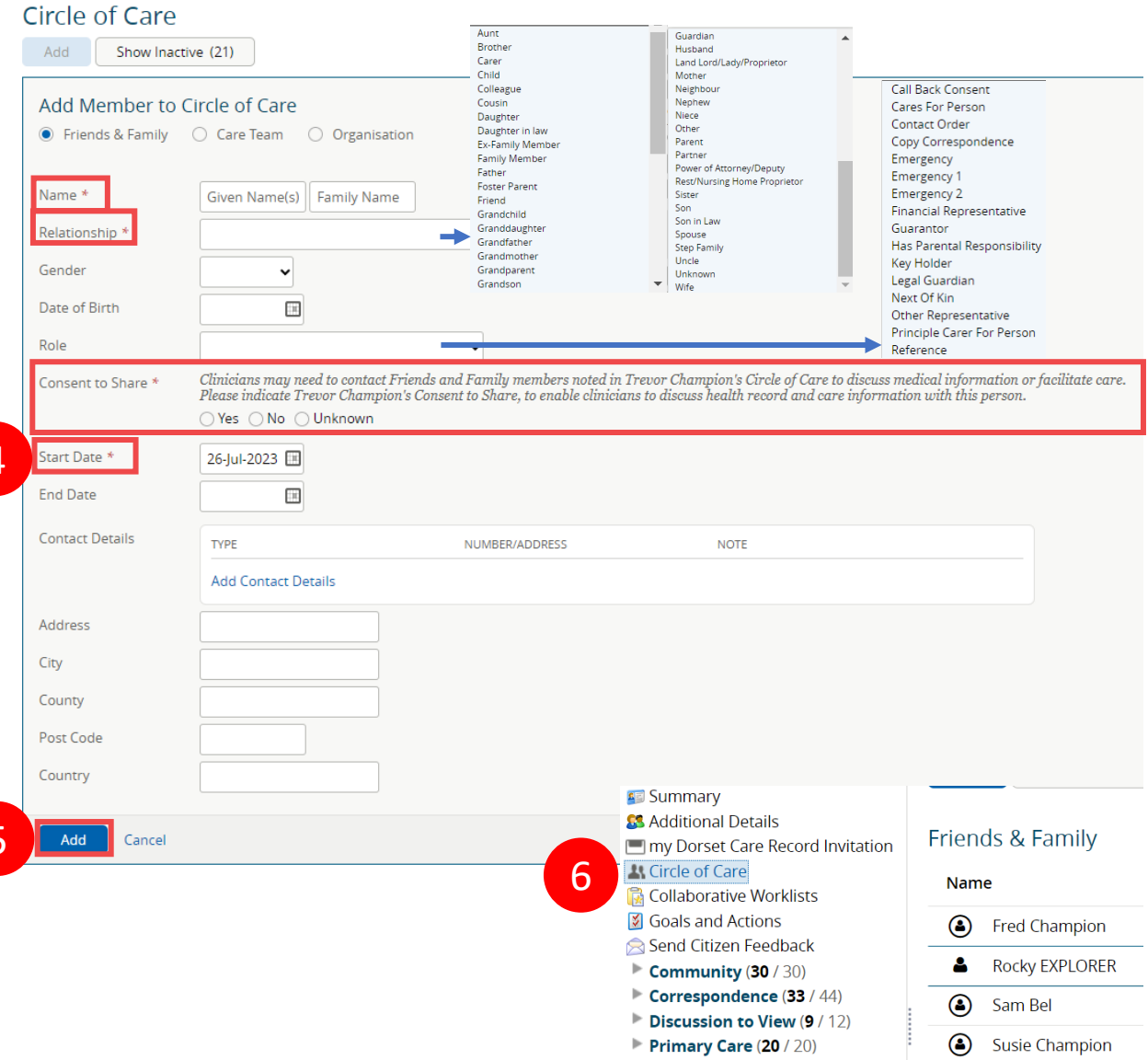
In addition to the above,

- You can specify an **End Date**. This is when the Friends & Family member will stop being an active member in the patient's Circle of Care.
- You can add in an email and telephone number under **Add 4 Contact Details** and include their **address** as well.

5 Click on **Add**.

6 When a **Friends & Family** member has been added to the patient's Circle of Care, the new member will initially show at the bottom of the list of **Friends & Family** members.

Click on the **Circle of Care** on the left to refresh and they will show in alphabetical order (by First Name) in the list of members.



4. How to view the details for a Friends & Family member listed in the Circle of Care



7 To view and edit the details of Friends & Family member, click on their name/line to expand the box.

NOTE

The new member's profile will look differently depending on the information inputted and whether Consent to Share has been granted.

CHAMPION, Trevor (Mr)
BORN 04-May-1967 (56y) GENDER Male
ADDRESS (3) Dorset County Hospital, WILLIAMS AVEN... HOME -
NHS Number 491 167 7333
PDS 4911677333
GP PRACTICE CANFORD HEATH GROUP PRACT

Documents: Summary, Problem List, Patient Task List, Medications Viewer, my Dorset Care Record, Social Care

Showing: All Mark All As Read
Group By: Category Sort By: []

7 James Norton Husband No 07786456787

⚠ Patient has NOT given consent to share their information.

Relationship: Husband
Gender: Male
Date of Birth: 12-Jul-1987 (36 years)
Start Date: 21-Jun-2023
Portal Access: EXPIRED
Invite James Norton to view Trevor Champion's health record via my Dorset Care Record. [Send Invitation](#)

Edit Close

Jessica Rabbit Daughter Next Of Kin Yes
Marianne Dolby Sister Next Of Kin Yes
Mog Cat Grandmother Reference Yes 0123456789

✅ Patient has given consent to share their information.

Relationship: Grandmother
Gender: Female
Date of Birth: 09-Jul-1941 (82 years)
Role: Reference
Start Date: 28-Jul-2023
End Date: 01-Sep-2023
Portal Access: Invite Mog Cat to view Trevor Champion's health record via my Dorset Care Record. [Send Invitation](#)

Edit Close

5. How to edit and remove/deactivate a Friends & Family member from the patient's Circle of Care



8 Click on the **Edit** button in the expanded box.

- 9 Make any amendments as necessary to:
- name,
 - relationship,
 - gender,
 - date of birth,
 - role,
 - consent to share,
 - contact details and
 - address.

NOTE

The End Date field under Start Date has now been replaced by the **Deactivate** field. Deactivate removes a **Friends & Family** member from the **Circle of Care**. Please note that a member within a Citizen Representative role, once deactivated cannot be re-activated.

Mog Cat Grandmother Reference Yes 0123456789

✓ Patient has given consent to share their information.

Phone 0123456789 - Only call in the evenings
Email mogcat@hotmail.com - Checked once a week on Sunday
Address 102 High Street
Dorchester
Dorset
DT1 1TG
UK

Relationship Grandmother
Gender Female
Date of Birth 09-Jul-1941 (82 years)
Role Reference
Start Date 28-Jul-2023
End Date 01-Sep-2023
Portal Access Invite Mog Cat to view Trevor Champion's health record via my Dorset Care Record. Send Invitation

Edit Close

Mog Cat Grandmother Reference Yes

Name * Mog Cat
Relationship * Grandmother
Gender Female
Date of Birth 09-Jul-1941
Role Reference
Consent to Share * Clinicians may need to contact Friends and Family members noted in Trevor Champion's Circle of Care to discuss medical information or facilitate care. Please indicate Trevor Champion's Consent to Share, to enable clinicians to discuss health record and care information with this person.
 Yes No Unknown
Start Date 28-Jul-2023
Deactivate Now On date 01-Sep-2023 ✖

TYPE	NUMBER/ADDRESS	NOTE
Phone	0123456789	Only call in the evenings
Email	mogcat@hotmail.com	Checked once a week on Sundi

Add Contact Details

Address 102 High Street
City Dorchester
County Dorset
Post Code DT1 1TG
Country UK

Update Cancel

How to edit and remove/deactivate a Friends & Family member from the patient's Circle of Care

10

Under **Deactivate**, select **Now** or **On date**, depending on when you would like the member to be removed from the patient's Circle of Care.

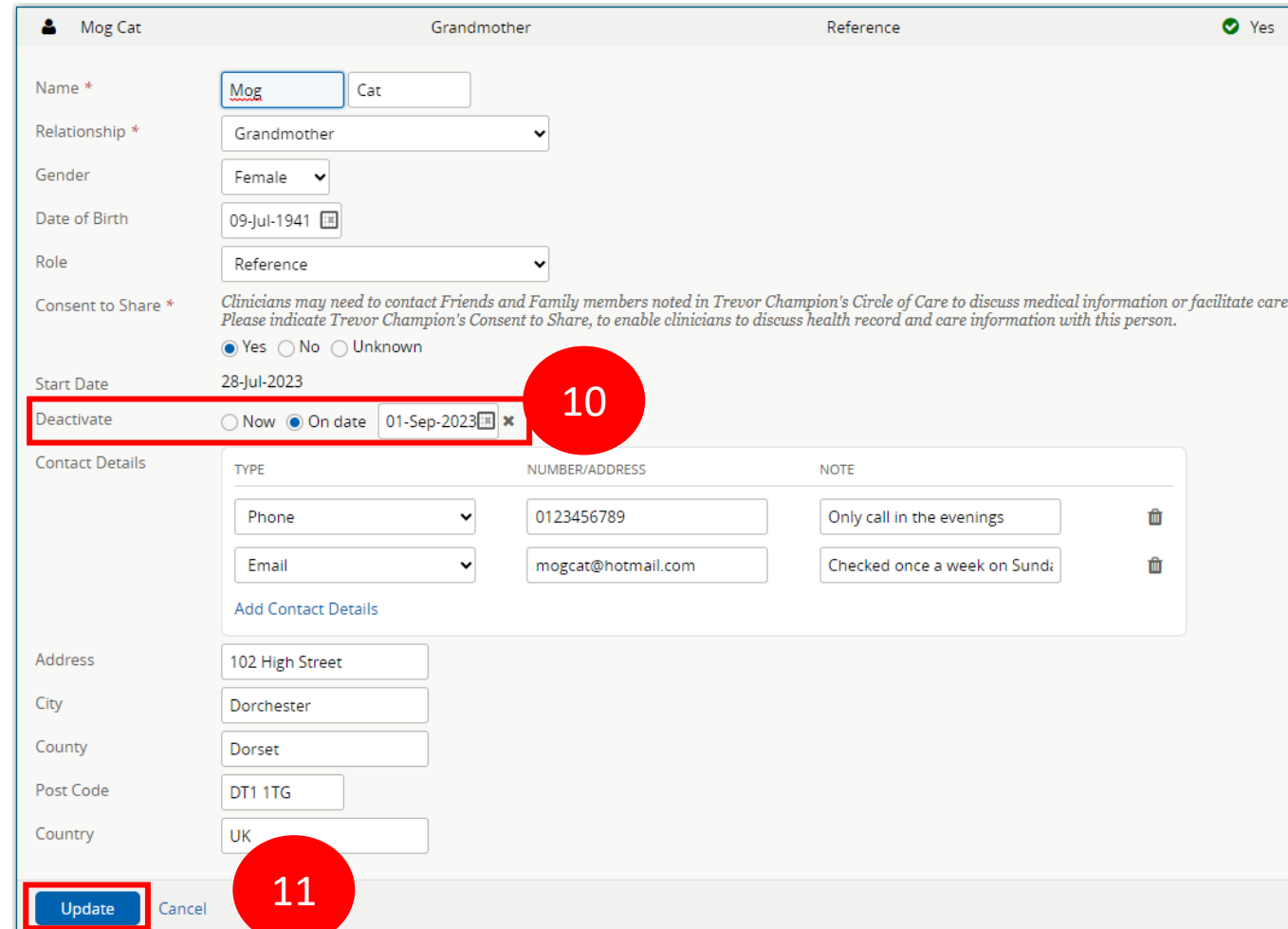
When you select **On date**, specify the date when you would like the member to be deactivated.

11

Click on the **Update** button to save the changes made.

12

If you've selected **Deactivate Now**, click on **Hide Inactive** at the top to only show active **Friends & Family** members in the patient's Circle of Care.



Mog Cat Grandmother Reference Yes

Name * Mog Cat

Relationship * Grandmother

Gender Female

Date of Birth 09-Jul-1941

Role Reference

Consent to Share * *Clinicians may need to contact Friends and Family members noted in Trevor Champion's Circle of Care to discuss medical information or facilitate care. Please indicate Trevor Champion's Consent to Share, to enable clinicians to discuss health record and care information with this person.*
 Yes No Unknown

Start Date 28-Jul-2023

Deactivate Now On date 01-Sep-2023 *

Contact Details

TYPE	NUMBER/ADDRESS	NOTE
Phone	0123456789	Only call in the evenings
Email	mogcat@hotmail.com	Checked once a week on Sundi

Add Contact Details

Address 102 High Street

City Dorchester

County Dorset

Post Code DT1 1TG

Country UK

Update Cancel

Circle of Care

Add Hide Inactive (21)

10

11

12

6. A deactivated member can be re-activated. Reactivating Friends & Family members

NOTE

This does not apply to members who have been made inactive from a Citizen Representative role.

Fred Champion **INACTIVE** Citizen Representative Unknown

Consent to share information is unknown.

Email: mydcr@dorsetcouncil.gov.uk
Secure Email: fred.champion@dorsetcarerecord.nhs.uk

Role: Citizen Representative
Start Date: 23-Aug-2021
End Date: 15-Mar-2022
Portal Access: **INACTIVE**

CHAMPION, Trevor (Mr)
BORN 04-May-1967 (56y) GENDER Male
ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE

Circle of Care
Show Inactive (21)

CHAMPION, Trevor (Mr)
BORN 04-May-1967 (56y) GENDER Male
ADDRESS (3) Dorset County Hospital, WILLIAMS AVENUE, Dorcheste...

Circle of Care
Hide Inactive (21)

Name	Relationship
Ann Bryce	Granddaughter INACTIVE

Edit Close

Ann Bryce Granddaughter **INACTIVE**

Name: Ann Bryce
Relationship: Granddaughter
Gender: Female
Date of Birth: 09-May-1978
Role: Cares For Person

Consent to Share: *Clinicians may need to contact Friends and Family members...*
 Yes No Unknown

Start Date: 09-Jun-2023
End Date: 24-Jul-2023

Activate Now On date

Contact Details: TYPE: Phone NUMBER/ADDRESS: 0123456789

Address, City, County, Post Code, Country

Update Cancel

Activate: Now On date

Deactivate:

Activate: Now On date

Deactivate:

13 Click on **Show Inactive** to see all **Friends & Family** members, both inactive/deactivated and active members.

14 Click on the inactive member's **name/line**.

15 Click on **Edit**. When a member is deactivated, the **Deactivate** box is relabelled as **Activate**.

16 Under **Activate**, select **Now** or **On date**. The **Deactivate** box will appear right under **Activate** to give you the option to select a date for deactivation.

17 Click on **Update**.

17

18 Click on **Hide Inactive** to only show active **Friends & Family** members in the patient's Circle of Care.

18



Access further **support and information** from
<https://news.dorsetcouncil.gov.uk/dcr-staff-area/learning-resources/>



Disclaimer

The screenshots in this training guide are taken from a test system and as such may vary slightly to the live DCR system.

Screenshots in this training guide do not contain any real patient data.

Data provided by source systems is read-only in DCR. There are various level of restrictions and sensitivities being applied within the Partner's systems, and the DCR respects and displays the data as provided by the Partners.

The information contained within the NHS Dorset system (the Spine) is the overriding system for updating demographics.