



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 a Care Team member to a patient's Circle of Care in the DCR



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

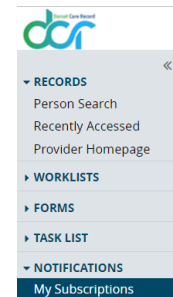
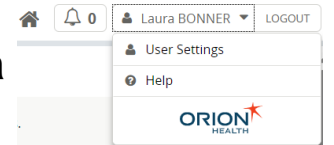
How to add, edit, remove and reinstate a Care Team member to a patient's Circle of Care in the DCR



This user guide will show you how to manage a **Care Team** member in a patient's **Circle of Care**.

- The **Care Team** member doesn't need to have access to the DCR for them to be added to the patient's **Circle of Care**.
- For a **Care Team** member with access to the DCR, their mobile and work phone numbers will be available to view to patients in their myDCR accounts.
 - The Care Team member cannot select which patients can see their telephone numbers.
 - In the **Circle of Care** user guide for patients, patients have been directed to not use the **Care Team** staff contact details unless they've been advised to do so.
 - The **Care Team** member can amend update or remove their contact details from the **Practitioner** area under **User Settings** in the **DCR**.
- The patient cannot make any changes to the **Care Team** category from **myDCR**.
- 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**.
- A **Care Team** member listed under a patient's **Circle of Care** can receive **notifications** for the Shared Files uploaded by the patient. In order to receive these notifications, they will need to:

- (1) Have access to the DCR
- (2) be added to the patient's **Care Team**, and
- (3) select to receive these notifications in **Notifications/My Subscriptions** in the left hand DCR menu.



How to add, edit, remove and reinstate a Care Team member to a patient's Circle of Care in the DCR



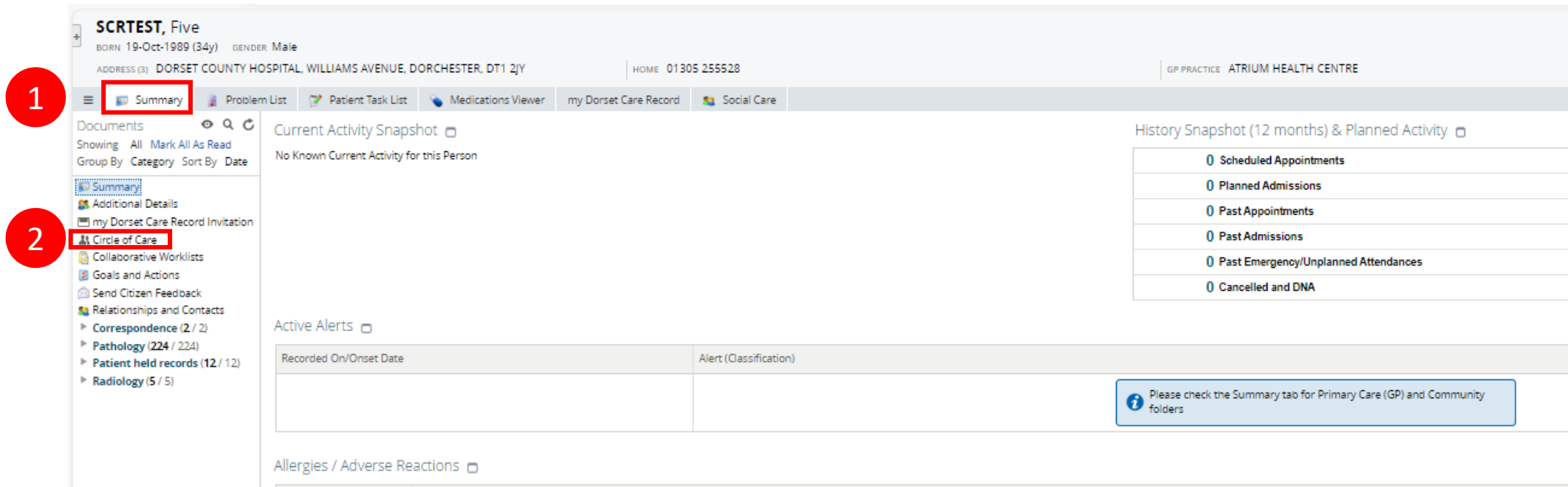
User Guide Content:

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 Care Team members with DCR access can amend their contact details from the Practitioner area under User Settings
4. How to add a Care Team member to the patient's Circle of Care
 - 4.1 How to add a Care Team member who already has DCR access
 - 4.2 How to manually add a Care Team member who does not have DCR access
5. How to edit the details for a Care Team member listed in the Circle of Care
6. How to remove/deactivate a Care Team member from the Circle of Care
7. How to re-activate/reinstate a Care Team 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

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

2 **Circle of Care**

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

Summary
Additional Details
my Dorset Care Record Invitation
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

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** tab, 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 PRACTICE

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

my Dorset Care Record Invitation: Add | Show Inactive (20)

myDCR Health Library Tags

myDCR Health Library

Circle of Care

Goals and Actions

Circle of Care

Add | Show Inactive (20)

Friends & Family

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



NOTE The patient is not able to make any changes to the Care Team category but will be able to see the Care Team members' contact details.

my Dorset Care Record Hi Trevor

Health Record

Trevor Champion
04 May 1967

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

Circle of Care
Add Show Inactive (22)

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	

my Dorset Care Record

ORION HEALTH

Orion Health ©2023

3. Care Team members with DCR access can amend their contact details from the Practitioner area under User Settings.



- 1 From the **Person Search** page or from within a patient's DCR record, click on your **Username**, and a drop-down box will expand.
- 2 Click on **User Settings**.
- 3 In the **Practitioner** area, update your **Mobile and Work Phone numbers** as needed.
- 4 Click on **Update Preferences**.
- 5 Click on **Person Search** or **Recently Accessed** to return to the Person Search homepage or Recently Accessed, respectively.

The screenshot shows the 'My Details' page for user Laura Bonner. The page is divided into several sections:

- Top Right:** User profile dropdown (1) showing 'Laura BONNER' and 'User Settings' (2).
- Left Sidebar:** Navigation menu with 'Recently Accessed' (5) highlighted.
- Main Content:**
 - Inactivity Logout:** Your maximum timeout is currently 15 minutes.
 - Important Messages:** Radio buttons for 'Show alert until dismissed', 'Show alert for 10 seconds' (selected), and 'Do not show alert'.
 - Groups I belong to:** MedMan - Update Medication Record, Problem List Users.
 - Users:** E-mail: laura.bonner@dorsetcouncil.gov.uk
 - Dorset Users:** Fields for Primary Role, Sector, Organisations, Facility, and Specialty.
 - Notifications:** Fields for My EMR, Mobile, My Webmail, and Email.
 - Practitioner (3):** A section with a note: 'The information in this section relates to Circle of Care. It will be visible to Citizen Portal users.' It contains fields for Mobile and Work Phone.
 - Provider Homepage:** A field for 'Worklist to show on My Homepage'.
- Bottom:** 'Update Preferences' (4) and 'Discard Changes' buttons.

NOTE

The contact details listed here will be visible to all patients to whose Circle of Care the Care Team member is added to. In the **Circle of Care** user guide for patients, patients have been directed to not use the **Care Team** staff contact details unless they've been advised to do so.

4. How to add a Care Team member to the patient's Circle of Care

6 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.**

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

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
 Community (30 / 30)
 Correspondence (33 / 44)
 Discussion to View (9 / 12)
 Primary Care (20 / 20)

Circle of Care Add Show Inactive (21) **6**

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	

NOTE

The Care Team member does not need to have access to the DCR for them to be added to the patient's Circle of Care.

4.1 Adding a member to the Care Team – the Care Team member already has a DCR account/access



7 Select the **Care Team** radio button.

8 Type in the **Full Name** of the Care Team member you would like to add to the patient's Circle of Care.

(1) If the Care Team member has a DCR account/access to the DCR, they will show under **Search Results**.

(2) If the Care Team member does not have a DCR account/access, they will need to be added manually via the **Add Manual Entry** link.

9 Click on them in the **Search Results** list.

10 In the additional box that opens following your selection, complete the following mandatory information:

- the **Role** they play in the patient's care,
- the **Start Date** for that role.

11 Click on **Add**.

Circle of Care

Add Show Inactive (8)

Add Member to Circle of Care

Friends & Family Care Team Organisation

Full Name * Anna Green

Search Results

Can't find who you're looking for? Refine your search, or enter manually. [Add Manual Entry](#)

Anna Green Showing 1 result

Name	Relationship	Role	Consent to Share	Contact Details
Edward Scissorhands	Ex-Family Member	Other Representative	Yes	

Circle of Care

Add Show Inactive (8)

Add Member to Circle of Care

Friends & Family Care Team Organisation

Full Name * Anna Green

Search Results

Can't find who you're looking for? Refine your search, or enter manually. [Add Manual Entry](#)

Laura Bonner (laura.bonner.test) Showing 1 result

Anna Green

Identifier

Role *

Start Date * 10-May-2022

End Date

Phone

Email

Add Cancel

When selecting a Role for the Care Team member, please note that the following Roles can receive notifications for shared files



Receiving shared files notifications	NOT Receiving shared files notifications
Admitting Provider Attending Provider Admitting Physician Attending Physician Citizen Portal Provider Clinical Provider Health Visitor Notification Recipient Patient Patient Representative	ACO Consulting Provider Care Coordinator Midwife Ordering Provider Ordering Physician Primary Care Provider REF MD Referring Provider Transition Care Manager

(July 2023)

The newly added Care Team member with DCR access will be displaying an icon to the left of their name.




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

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

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 Yilbat	Primary Care Provider		
Sam Belhomme	Attending Provider		
Theresa Barton	Midwife		


➤ The newly added Care Team member will also show on the patient's myDCR account.

my Dorset Care Record Hi Trevor

Health Record
Trevor Champion
04 May 1967

My Appointments
My Health Record
My Links
My Support Network
My Account

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 Yilbat	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	

✓ The entry when you click on their name/line also shows that they have Clinical Portal Access.

Barbara Zurek Attending Provider

Clinician Details

Role Attending Provider
Start Date 23-May-2022
Deactivate Now On date
Access Clinical Portal
Email barbara.zurek@dorsetcouncil.gov.uk

Organisation Details
There are no organisations associated with this participant.

Update Cancel

NOTE

It is possible to add in a member to the Care Team who doesn't have a DCR account, by adding them manually.

4.2 Manually adding a member to the Care Team – the Care Team member does not have DCR access

12 It is possible to add a Care Team member who does not have access to the DCR, by adding them manually.

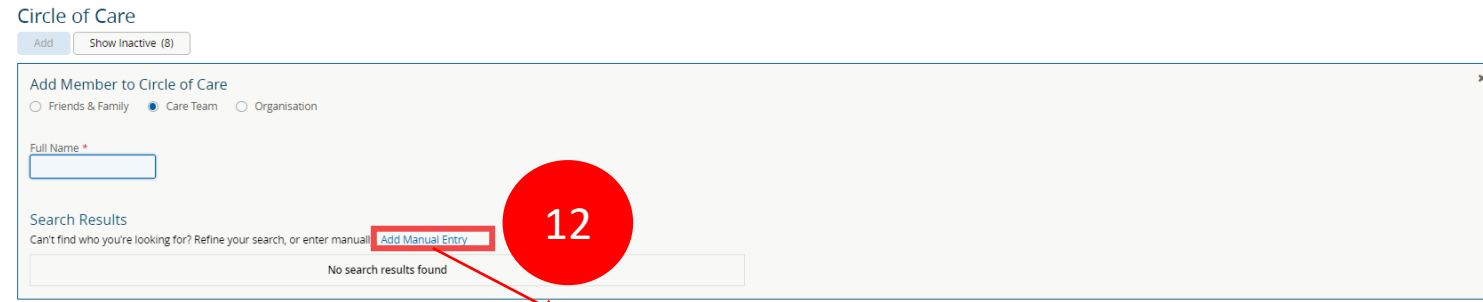
In this case, the patient will be able to find them in their myDCR but the Care Team member won't be able to see the patient's record as they don't have access to the DCR.

Click on **Add Manual Entry**.

13 Fill in at least the mandatory fields of **first name, surname, role and start date**. You can add their telephone number and/or their email address under Contact Details.

14 Click on **Add**, and they will be added to the Care Team.

They will not show a circle around the icon as they do not have DCR access.



Circle of Care

Add Show Inactive (8)

Add Member to Circle of Care

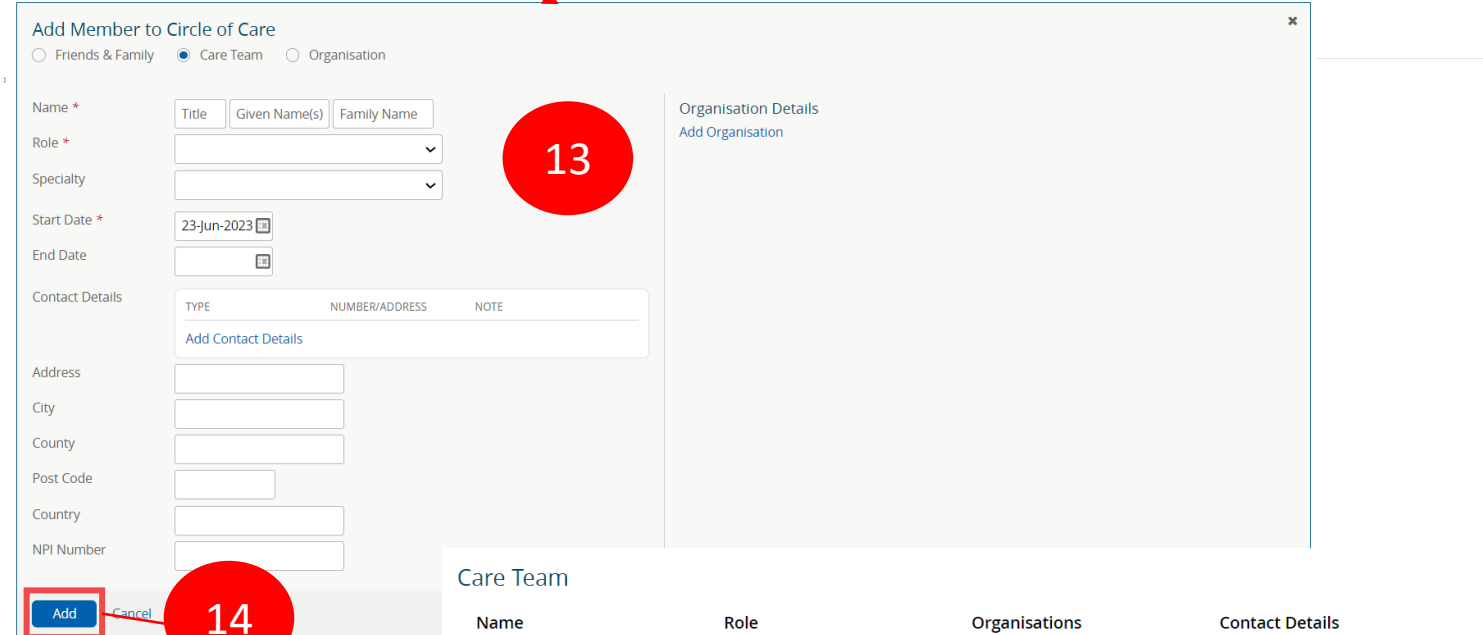
Friends & Family Care Team Organisation

Full Name *

Search Results

Can't find who you're looking for? Refine your search, or enter manually **Add Manual Entry**

No search results found



Add Member to Circle of Care

Friends & Family Care Team Organisation

Name *

Title Given Name(s) Family Name

Role *

Specialty

Start Date * 23-Jun-2023

End Date

Contact Details

TYPE NUMBER/ADDRESS NOTE

Add Contact Details

Address

City

County

Post Code





Country

NPI Number

Organisation Details

Add Organisation

Add Cancel

Care Team			
Name	Role	Organisations	Contact Details
 Anna Green	Consulting Provider		+441234567890
 Barbara Zurek	Attending Provider		
 Georgina Hulbert	Attending Provider		07983 111111
 Jayne Catley	Ordering Provider		

The newly added Care Team member without DCR access does not have the circle around the person icon



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

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

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 Yilbat	Primary Care Provider		
Sam Belhomme	Attending Provider		
Theresa Barton	Midwife		

➤ The newly added Care Team member will also show on the patient's myDCR account.

my Dorset Care Record Hi Trevor

Health Record
Trevor Champion
04 May 1967

My Appointments
My Health Record
My Links
My Support Network
My Account

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 Yilbat	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	

✓ The entry when you click on their name/line also shows that they don't have Clinical Portal Access.

Anna Green Consulting Provider +441234567890

Anna Green	Consulting Provider
Role	Consulting Provider
Start Date	23-Jun-2023
Access	No Access
Phone	+441234567890

Edit Close



5. Editing the details for a member of the Care Team, with or without DCR access



15

Click on their **name/line**.

16

Click on **Edit**.

17

To make changes to a **Care Team** member *without DCR access*, you can update all their details.

Underneath the **Start Date**, there is the option to **Deactivate**.

The **End Date** shown when adding a Care Team member has been replaced with **Deactivate**.

18

To make changes to a **Care Team** member *with DCR access*, you can only provide an update for when to **Deactivate** them.

You can select **Now or On date** and then input the date in the box that appears when you select the radio button **On date**.

19

Click on **Update**.

Care Team

Name	Role	Organisations	Contact Details
Anna Green	Consulting Provider		+441234567890
Barbara Zurek	Attending Provider		
Georgina Hulbert	Attending Provider		
Jayne Catley	Ordering Provider		

15

16

Anna Green Consulting Provider +441234567890

Anna Green
Role Consulting Provider
Start Date 23-Jun-2023
Access No Access
Phone +441234567890

Edit Close

19

Anna Green Consulting Provider +441234567890

Name *

Role * Consulting Provider

Specialty

Start Date 23-Jun-2023
Deactivate Now On date

Contact Details

TYPE	NUMBER/ADDRESS	NOTE
Phone	+441234567890	

Address
City
County
Post Code
Country
NPI Number

Update Cancel

17

18

Barbara Zurek Attending Provider

Clinician Details

Role Attending Provider
Start Date 23-May-2022
Deactivate Now On date

Access Clinical Portal
Email barbara.zurek@dorsetcouncil.gov.uk

Update Cancel

Deactivate

6. Removing a member from the Care Team

20

Click on the Care Team member's **line** and in the expanded box that opens click on **Edit**.

Care Team

Name	Role
(nhs-sds)	Attending Provider
Alex Snow	Midwife
Anna Green	Consulting Provider

Anna Green

Role Consulting Provider

Start Date 28-Jul-2023

Access No Access

Phone +441234567890

Edit Close

21

In the new box that opens, choose when you would like to deactivate the role they play in the patient's care from, whether now or from a certain date, by clicking on the respective **Deactivate** radio button.

Anna Green Consulting Provider

Name * Title Anna Green

Role * Consulting Provider

Specialty

Start Date 28-Jul-2023

Deactivate Now On date

Contact Details

TYPE	NUMBER/ADDRESS	NOTE
Phone	+441234567890	

Address

City

County

Post Code

Country

NPI Number

Update Cancel

22

Click on **Update**.

23

On the date when the **Care Team** member is no longer active, they will display an **Inactive** label next to their role.

Organisations

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

24

Click on **Hide Inactive** to only show active **Organisations** in the patient's Circle of Care.

CHAMPION, Trevor (Mr)

BORN 04-May-1967 (56y) GENDER Male

ADDRESS (3) Dorset County Hospital, WILLIAMS AVEN... HOME -

Summary Problem List Patient Task List Medi

Documents

Showing All Mark All As Read

Group By Category Sort By Date

Circle of Care

Add **Hide Inactive (19)**

7. A deactivated member can be re-activated: Reinstating Care Team members



25

Click on **Show Inactive** to see all **Care Team** members, both inactive/deactivated and active members.

26

Click on their **name/line**.

27

Click on **Edit**.

28

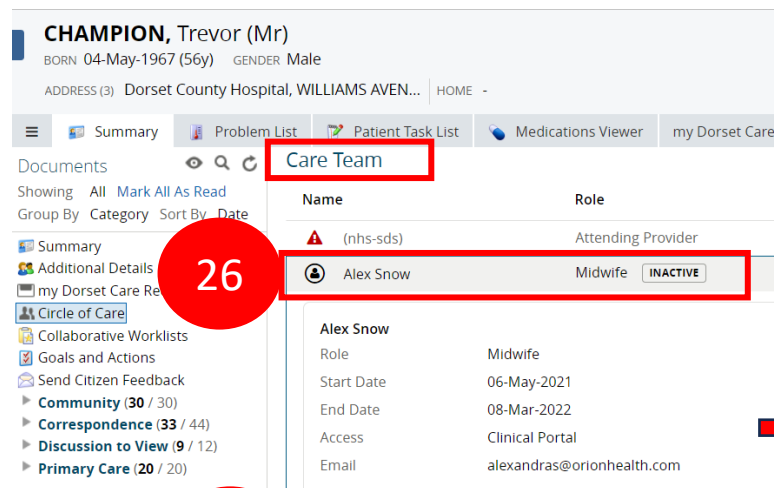
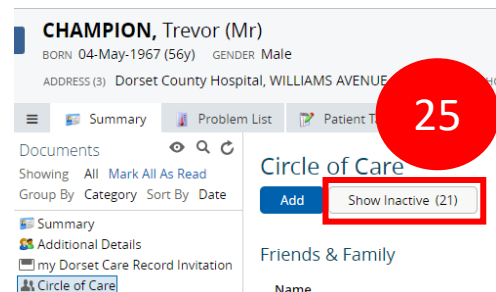
When a member is deactivated, the **Deactivate** box is relabelled as **Activate**. Under **Activate**, select **Now** or **On date**. The **Deactivate** box will appear right under **Activate** for you to select a date for deactivation.

29

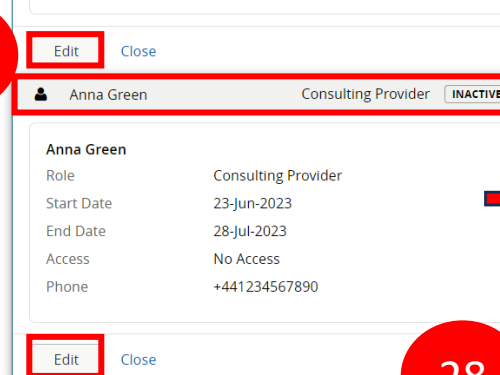
Click on **Update**.

30

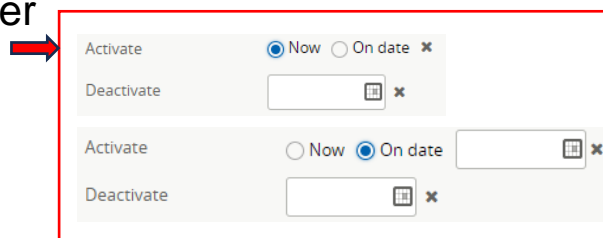
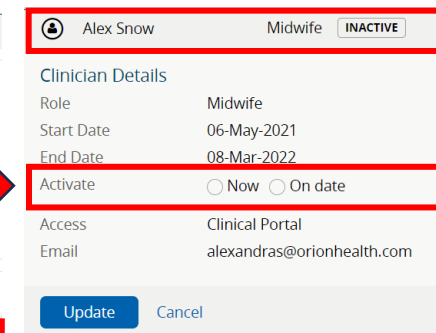
Click on **Hide Inactive** to only show active **Friends & Family** members in the patient's Circle of Care.



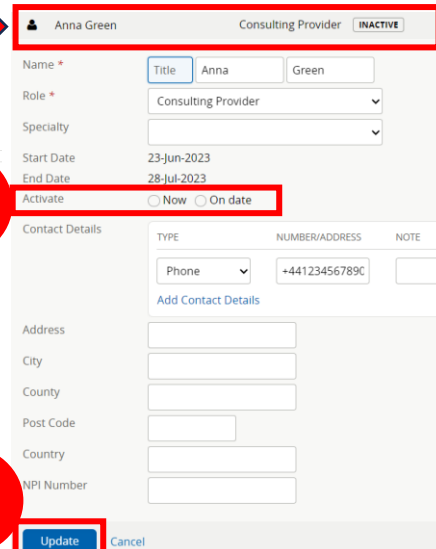
27



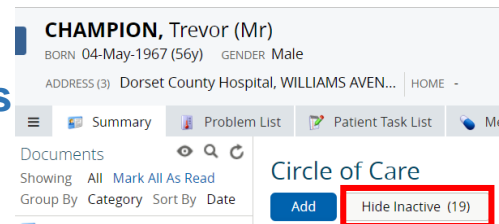
28



29



30





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.