'My record is **available to share**...'

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
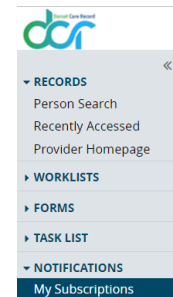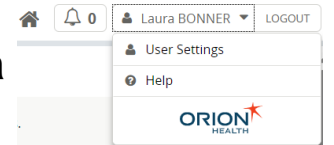
Dorset Care Record

dcr

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
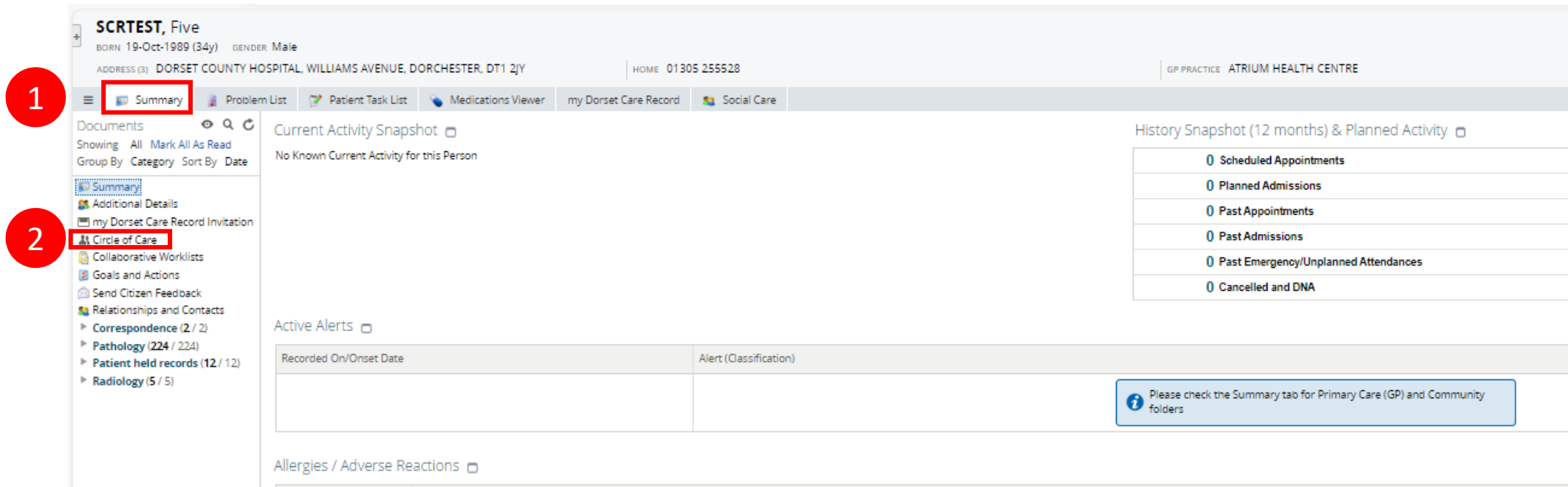
User Guide Content:

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**.

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**.

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.

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.

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.**

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.

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**.

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	ACO
Attending Provider	Consulting Provider
Admitting Physician	Care Coordinator
Attending Physician	Midwife
Citizen Portal Provider	Ordering Provider
Clinical Provider	Ordering Physician
Health Visitor	Primary Care Provider
Notification Recipient	REF MD
Patient	Referring Provider
Patient Representative	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.

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

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

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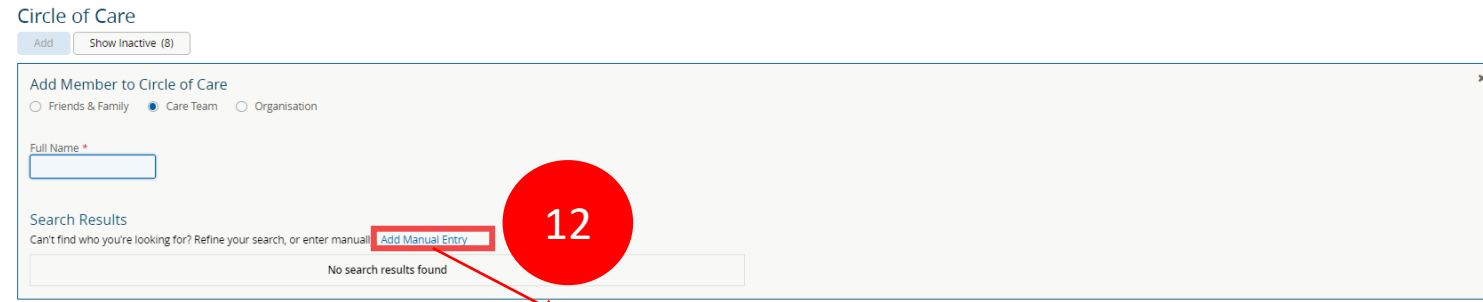
In this case, the patient will be able to find them in their myDCR but the Care Team member won't be able to see the patient's record as they don't have access to the DCR.

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.

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

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

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

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**.

6. Removing a member from the Care Team

Dorset Care Record

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

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.

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.

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

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 **20**

21

	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	+44123456789C		🗑

Add Contact Details

Address	
City	
County	
Post Code	
Country	
NPI Number	

22 Update Cancel

Organisations **23**

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

24

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)

Activate

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.
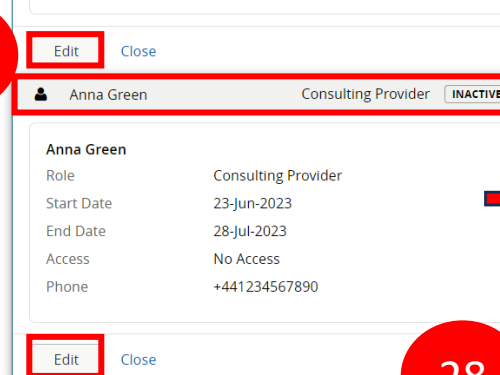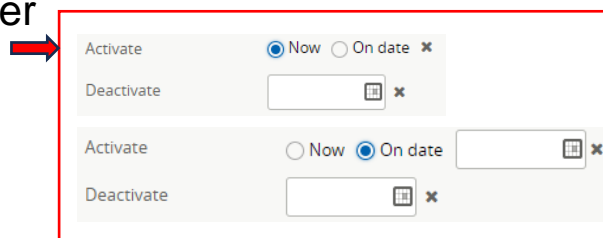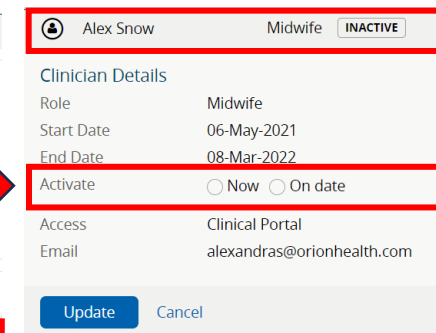
29 Click on **Update**.

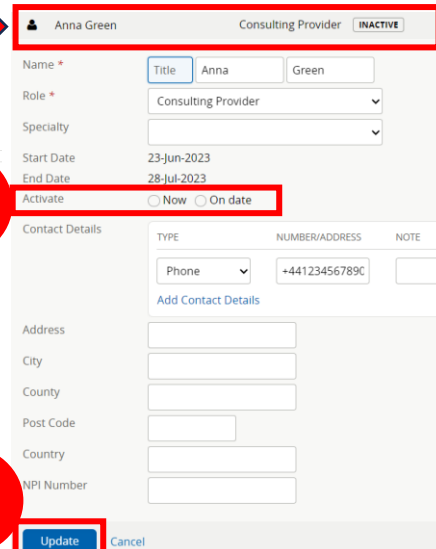**30** Click on **Hide Inactive** to only show active **Friends & Family** members in the patient's Circle of Care.
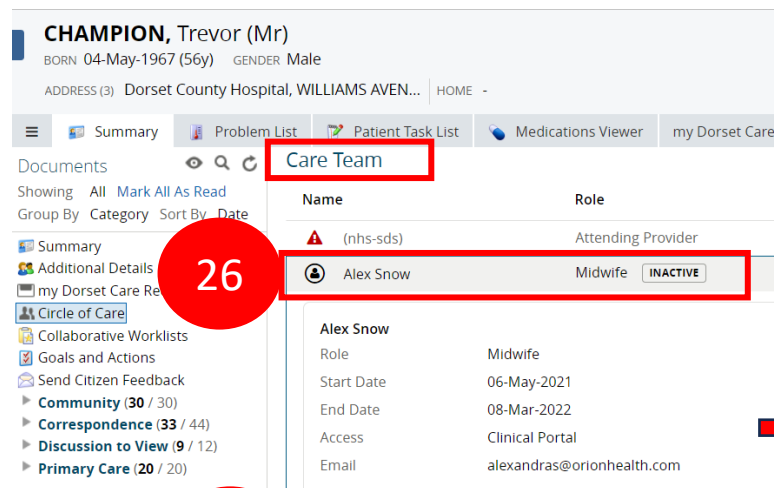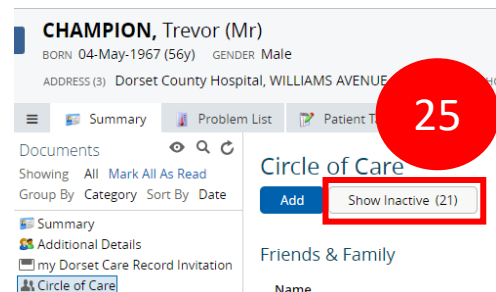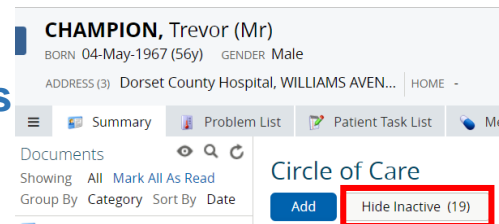
Disclaimer

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.