



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 an Organisation 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 an Organisation to a patient's Circle of Care in the DCR



This user guide will show you how to manage an Organisation from a patient's **Circle of Care** in the **DCR**. Organisations can be added to a patient's record as support for the patient - the organisation does not have to be a DCR user to be added in. The patient cannot make any changes to the **Organisations** category.

Please note 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:

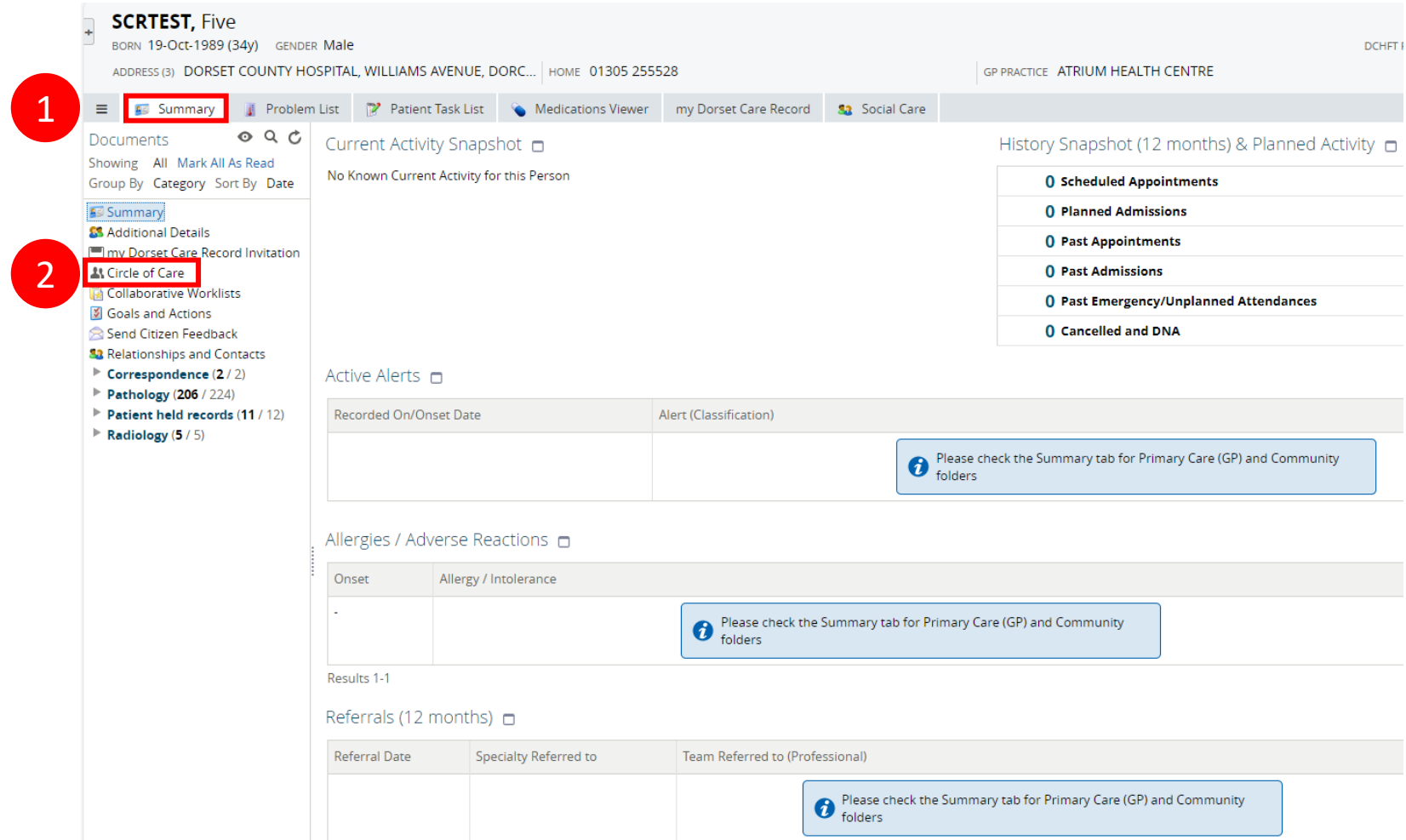
1. How to find the Circle of Care from the Summary tab or my Dorset Care Record tab
2. How the citizen sees the Circle of Care in myDCR under My Support Network
3. How to add an Organisation to the patient's Circle of Care
4. How to edit the details for an Organisation listed in the Circle of Care
5. How to remove/deactivate an Organisation from the Circle of Care
6. How to re-activate/reinstate an Organisation who was previously deactivated

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



1 Summary

2 Circle of Care

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

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 (206 / 224)
 Patient held records (11 / 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)

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

Allergies / Adverse Reactions

Onset	Allergy / Intolerance
-	

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

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 the **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 PRACTICE
 KNOWN ALERTS

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)

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 Belhomme	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 an Organisation to the patient's Circle of Care

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

You can add a member to the following:

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

NOTE

Organisations can be added to a patient's record as support for the patient. The organisation does not have to be a DCR user to be added in.

The patient is not able to make any changes to the **Organisations** category.

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) **3**

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

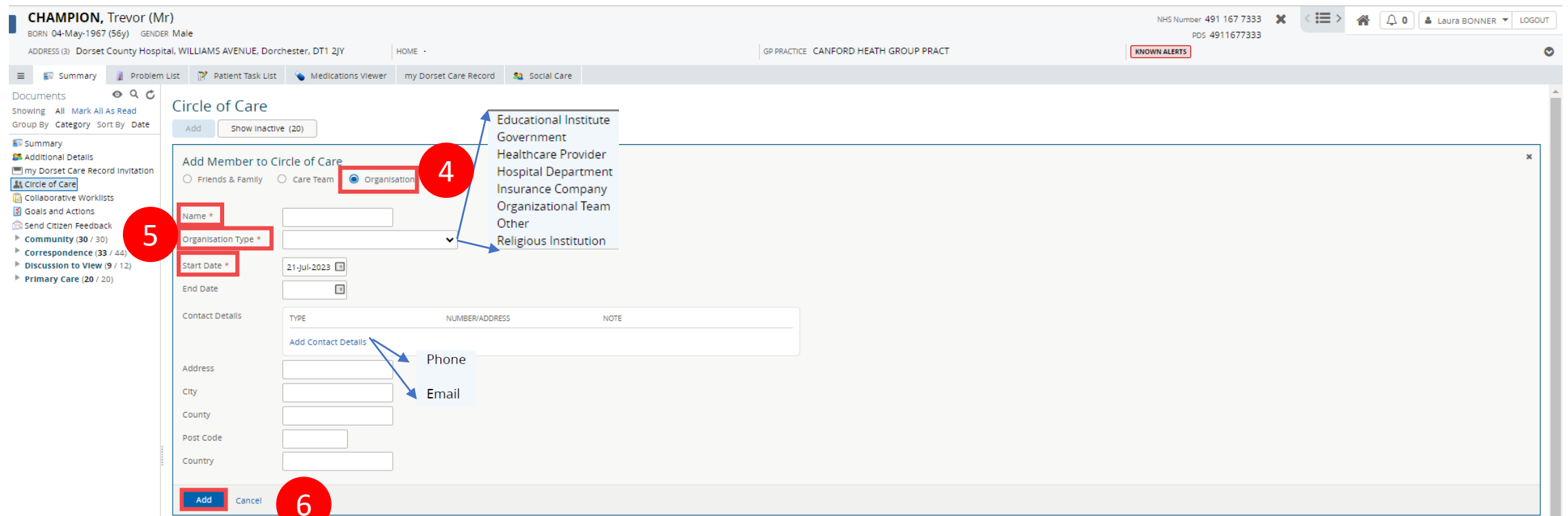
Name	Type	Contact Details
Active Dorset	Other	
Ben TESTDCR	Hospital Department	
James Norton	Religious Institution	

Adding an Organisation to a patient's Circle of Care

4 Select the **Organisation** radio button.

5 Complete the mandatory fields marked with a **red Asterisk**: **Name***, **Organisation Type***, **Start Date***

You can add in a phone number or an email address under **Add Contact Details** and the patient will be able to see these in their myDCR and contact the Organisation as needed.



The screenshot shows the 'Add Member to Circle of Care' form for Trevor Champion. The form is divided into several sections:

- Header:** Patient name (CHAMPION, Trevor (Mr)), birth date (04-May-1967), gender (Male), and address (Dorset County Hospital, WILLIAMS AVENUE, Dorchester, DT1 2JY).
- Navigation:** 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.
- Circle of Care:** Add, Show Inactive (20). Radio buttons for Friends & Family, Care Team, and Organisation (selected).
- Add Member to Circle of Care:**
 - Name ***: Text input field.
 - Organisation Type ***: Dropdown menu with options: Educational Institute, Government, Healthcare Provider, Hospital Department, Insurance Company, Organizational Team, Other, Religious Institution.
 - Start Date ***: Date picker (21-Jul-2023).
 - End Date**: Date picker.
 - Contact Details:** Table with columns TYPE, NUMBER/ADDRESS, NOTE. Includes an 'Add Contact Details' button.
 - Address:** Text input field.
 - City:** Text input field.
 - County:** Text input field.
 - Post Code:** Text input field.
 - Country:** Text input field.
- Buttons:** Add, Cancel.

6 Click on **Add**.

4. Editing the details for an Organisation

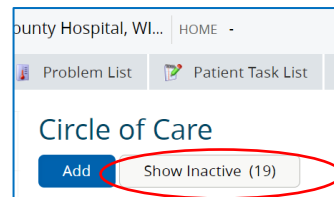
7 Click on the **Organisation** line from the **Organisations** category.

8 Click on **Edit**.

9 Make any amendments, as necessary.

You can Deactivate the organisation, but you cannot delete them.

When deactivated, the organisation will no longer show under Organisations. Rather, you will find them under **Show Inactive**.



10 Click on **Update**.

Organisations

Name	Type	Contact Details
Active Dorset	Other	

Organisation Type	Other
Start Date	15-Dec-2021

7 Edit Close

Organisations

Name	Type	Contact Details
Active Dorset	Other	

9

Name *

Organisation Type *

Start Date 15-Dec-2021

Deactivate Now On date

TYPE	NUMBER/ADDRESS	NOTE
Add Contact Details		

Address

City

County

Post Code

Country

10 Update Cancel

5. Removing an Organisation from the Circle of Care



17 Click on the Organisation's **line** and in the expanded box that opens click on **Edit**.

18 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.

19 Click on **Update**.

20 On the date when the **Organisation** is no longer active, they will display an **Inactive** label next to their type.

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

Organisations

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

Address: 01305 654321 United Kingdom

Organisation Type: Religious Institution

Start Date: 10-Jul-2023

Edit Close

James Norton Religious Institution

Name * James Norton

Organisation Type * Religious Institution

Start Date 10-Jul-2023

Deactivate Now On date

Contact Details

TYPE	NUMBER/ADDRESS	NOTE
Add Contact Details		

Address: 01305 654321

City:

County:

Post Code:

Country: United Kingdom

Update Cancel

Organisations

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

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

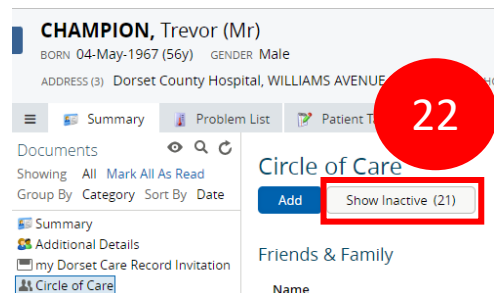
Documents Showing All Mark All As Read Group By Category Sort By Date

Circle of Care **Add** **Hide Inactive (19)**

6. A deactivated member can be re-activated: Reactivating Organisations

22

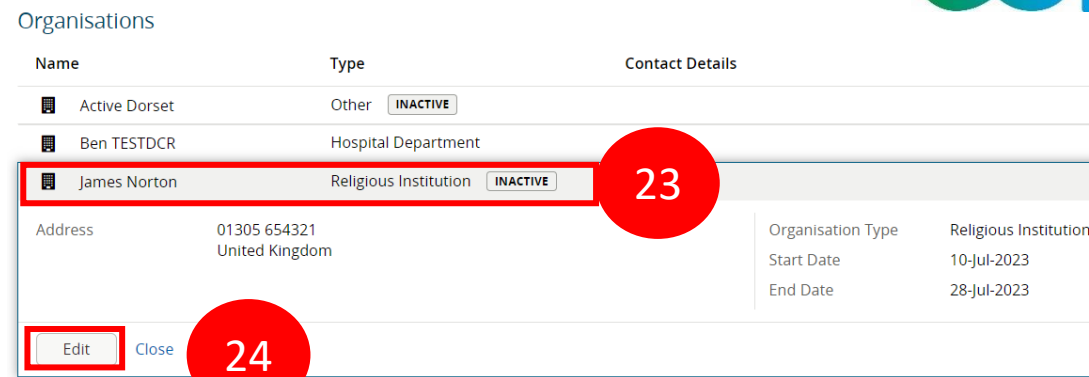
Click on **Show Inactive** to see all **Organisations**, both inactive/deactivated and active.



22

23

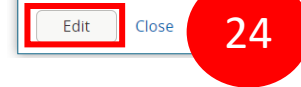
Click on their **name/line**.



23

24

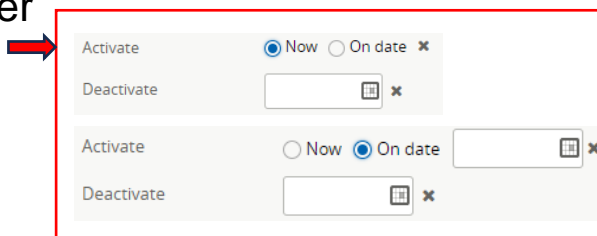
Click on **Edit**.



24

25

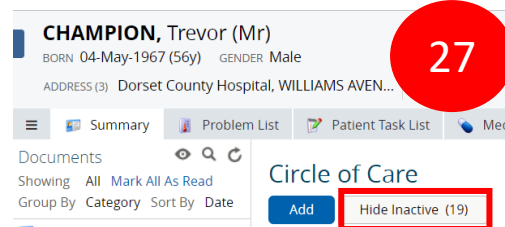
When a member is deactivated, the **Deactivate** box is relabelled as **Activate**. Under **Activate**, select **Now** or **On date**. The **Deactivate** box will appear right under **Activate** for you to select a date for deactivation.



25

26

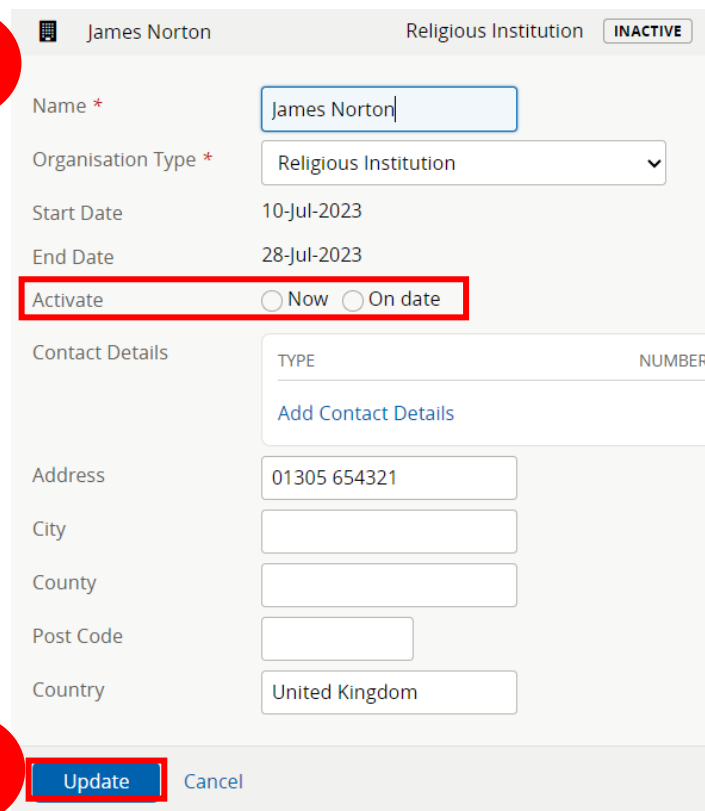
Click on **Update**.



27

27

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



26



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.