

Patient Record Transfers Scenarios Guidance

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Background

Primary Care Support England (PCSE) is commissioned by NHS England to provide a number of services within the primary care sector. One of the core services that PCSE provide is the records movements service. The service's purpose is to collect, redistribute and, where necessary, store a patient's paper medical record following an event that results in a patient being deregistered from a GP practice known as a deduction.

A practice may receive a deduction for a patient because they've registered at a new practice, the patient has left the country, or the practice have marked the patient as deceased in their clinical system. The patient's paper medical record will either follow them to their new practice or be sent to PCSE's central records storage facility. The electronic health record (EHR) will transfer to a patient's new practice via GP2GP or will need to be printed out to go to the central storage facility if the patient is leaving the register altogether (unless they are deceased).

The digitisation of GP records means that there are a number of scenarios where these current arrangements require adjustment by GP practices; therefore, the purpose of this guidance is to capture all the different scenarios for all types of patient record movements. The aim is for GP practices to have the clarity and certainty that they are following the correct process as outlined in the national standards whenever a patient leaves their practice. Definitions for each type of patient movement are provided below.

NHSE's Continuity and Digitisation of GP Records programme will result in future changes to the arrangements for GP records movement. This guidance will be updated following any significant change.

Patient Record Movement Type Definitions

- **Deducted patient**
A patient who is deregistered at their GP Practice because they have registered at a different GP Practice or have moved out of England.
- **Suspended patient**
A patient who become deregistered from their GP practice in England and has not yet registered with a new GP practice in the UK, or they have moved abroad.
- **Deceased patient**
A patient who has died and death recorded on the national patient database and GP clinical system.
- **Defence Medical Services (DMS) patients**
 - 1) Service personnel; – patients receiving primary healthcare from the Defence Medical Services (DMS) and the patient's clinical notes have been entered onto a DMS Healthcare Record, not an NHS record. Their paper NHS medical records will be stored until they are discharged from the armed forces, register with a GP practice in the UK and then their records will transfer to the new NHS GP.
 - 2) Dependants of service personnel who have registered at a DMS Health Centre – the paper records will transfer to the DMS centre until the patient registers elsewhere and then the records will transfer to the new GP, either in the DMS or NHS.

- **Home Nation transfer patient** – Patients moving to Wales, Scotland and Northern Ireland, Isle of Man, and Isle of Scilly.

Quick Navigation Links Table

Patient Type	Not Scanned	On Clinical System	Scanned but NOT on Clinical System
Deduction	<u>X</u>	<u>X</u>	<u>X</u>
Deceased	<u>X</u>	<u>X</u>	<u>X</u>
Suspended	<u>X</u>	<u>X</u>	<u>X</u>
Defence Medical Services	<u>X</u>	<u>X</u>	<u>X</u>
Home Nations Transfer	<u>X</u>	<u>X</u>	<u>X</u>

Scenarios Tables

Table 1 - records which are entirely paper i.e., the LG record and envelope is unscanned.

Patient Type	GP Practice Process
<p>Scenario 1 - Deducted Patients</p> <p>Note: this is for a successful GP2GP transfer. If the GP2GP transfer has failed, please see 'Footnote: GP2GP Failures'.</p>	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the deducted patient record. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and deliver to the patient's new GP practice.
<p>Scenario 2 - Deceased Patients</p>	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the deceased patient record. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse. • The record would then be stored into the PCSE archive. • Note: the EHR remains with the practice. There is NO requirement to print and send the EHR to NHSE.
<p>Scenario 3 – Suspended Patients</p>	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the suspended patient record. • The practice print the EHR from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse.
<p>Scenario 4 – DMS Patients</p>	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the patient paper record.

	<ul style="list-style-type: none"> • The practice print the EHR from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse.
Scenario 5 – Home Nation Transfer Patients (Patients moving to Wales, Scotland, and Northern Ireland & Isle of Man).	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the home nations transfer patient record. • The practice print the EHR from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and deliver to the patient’s new practice.

Table 2 - Records that are digitised and held on the clinical system.

Patient Type	GP Practice Process
Scenario 1a - Deducted Patients - LG envelope and contents have been destroyed.	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the deducted patient record. • The label can be securely destroyed as there is no paper record to transfer.
Scenario 1b - Deducted Patients - LG envelope and contents have not yet been destroyed.	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the deducted patient record. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and deliver to the patient’s new GP practice.
Scenario 2 - Deceased Patients	<ul style="list-style-type: none"> • No action is needed.
Scenario 3 – Suspended Patients	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the suspended patient record. • The practice print the EHR from the GP IT system. • The practice print the scanned LG record from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE

	<p>Online supplies service and attach the label.</p> <ul style="list-style-type: none"> • City Sprint collect the LG record and transport to the PCSE warehouse.
Scenario 4 – DMS Patients	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the patient paper record. • The practice print the EHR from the GP IT system. • The practice print the LG record from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse.
Scenario 5 – Home Nation Transfer Patients (Patients moving to Wales, Scotland, and Northern Ireland & Isle)	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the home nations transfer patient record. • The practice print the EHR from the GP IT system. • The practice print the scanned LG record from the GP IT system. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and deliver to the patient’s new practice.

Table 3 - Records that are scanned/digitised and not held on the clinical system e.g., in the cloud.

Patient Type	GP Practice Process
Scenario 1- Deducted Patients	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the deducted patient record. • The practice will reprint the scanned LG record from wherever it has been stored electronically. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and deliver to the patient’s new GP practice.
Scenario 2 - Deceased Patients	<ul style="list-style-type: none"> • No action is needed.
Scenario 3 – Suspended Patients	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the suspended patient record. • The practice print the EHR from the GP IT system. • The practice print the scanned LG record from wherever it has been stored electronically. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse.
Scenario 4 – DMS Patients	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the patient paper record. • The practice print the EHR from the GP IT system. • The practice print the scanned LG record from wherever it has been stored electronically. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service and attach the label. • City Sprint collect the LG record and transport to the PCSE warehouse.

<p>Scenario 5 – Home Nation Transfer Patients (Patients moving to Wales, Scotland, and Northern Ireland & Isle of Man)</p>	<ul style="list-style-type: none"> • City Sprint deliver a transit label for the home nations transfer I patient record. • The practice print the EHR from the GP IT system. • The practice print the scanned LG record from wherever it has been stored electronically. • The practice put the LG record into a City Sprint bag, ordered via PCSE Online supplies service. and attach the label. • City Sprint collect the LG record and deliver to the patient’s new practice.
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Footnote 1: Deletion Advice for Scanned LG Records Not Stored in the Clinical System e.g. The Cloud

It is strongly advised that for all patient scenarios that the new practice informs the deducing practice that the printed LG record is legible and of sufficient quality. The deducing practice may have to reprint the record if it is of poor quality. It is at this point that the deducing practice/cloud supplier can delete the scanned LG record.

Footnote 2: GP2GP Failures

It is not possible to use GP2GP transfers for patients moving to Wales, Scotland, Northern Ireland, or Defence Medical Services. The digital record must be printed and placed in an NHS transit polybag, alongside any paper records, including LG envelopes where still available. The transit label must be stuck onto the transit polybag and all records for transfer placed in the delivery sacks provided by City Sprint.

Where a GP2GP transfer has not been successful, a practice will be notified via their clinical system. A work item is raised for the practice to print off the EHR. This should be sent along with the LG record and envelope. In the situation where the paper LG record and envelope has already been collected, practices need to visit PCSE Online and print an additional label for the EHR by following the ‘Not My Record’ process.

In all cases where the GP2GP has not been successful the digital record must be reprinted and transferred in a LG envelope, City Sprint bag and transit label.

Footnote 3: Practice Closures

Following a practice closure, practices follow the processes in Table 1 (the LG record and envelope are not scanned) for all patient records held at the practice. This equally applies to patients that do not re-register prior to the collection of the paper records by PCSE: the digital record is reprinted and placed in the LG envelope.

Disclaimer

This information is correct at the time of writing. NHS England's GP Records Digitisation programme has been running for over three years, and technological advancements within the programme mean that this document may be subject to change. We will update the document as soon as any change to any of the scenario processes has been agreed and finalised. For further information regarding GP records management and the Digitisation programme in general, please see the 'Useful Links' section below.

Useful Links

- Dept of Health, BMA and RCGP GP Records Good Practice Guide: <https://www.gov.uk/government/publications/the-good-practice-guidelines-for-gp-electronic-patient-records-version-4-2011>
- Records Management Code of Practice: [Records Management Code of Practice - NHS Transformation Directorate \(england.nhs.uk\)](#)
- Digitisation Programme FutureNHS Platform (GP IT): <https://future.nhs.uk/DigitalPC/view?objectID=29846736>
- PCSE Online: [PCSS: Login \(england.nhs.uk\)](#)
- Records movement guidance (currently under review): [pcse-new-process-rollout-flyer_gp-staff-phase-33_final.pdf \(england.nhs.uk\)](#)

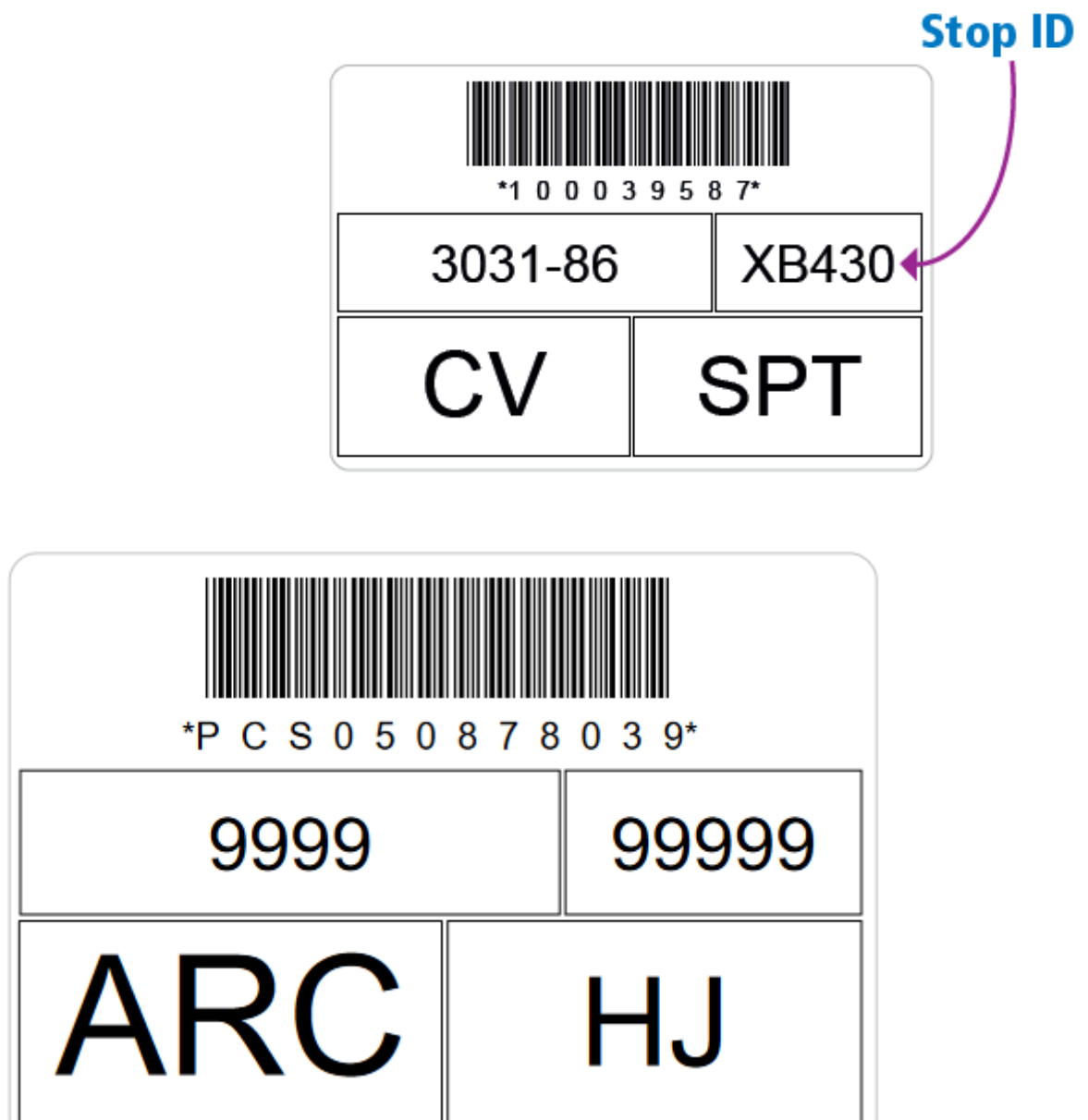
Feedback / Contact Us

Should you have any or have any queries and/or questions about the Digitisation programme, please email: [Contact us - Primary Care Support England](#)

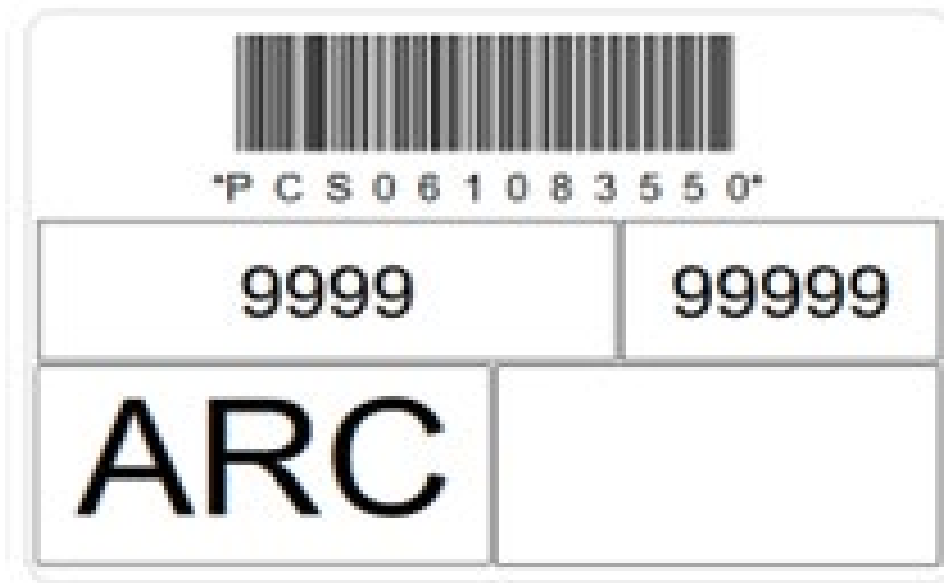
Appendix: Example Patient Transit Labels

Deducted Patients Examples

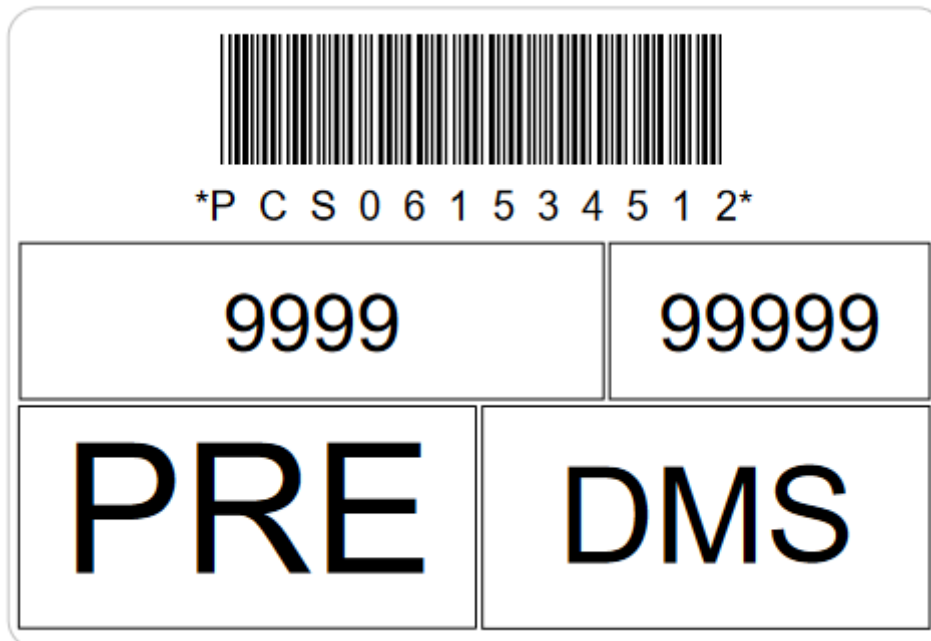
Every practice has a unique stop ID which can be found top right of the tracking label.



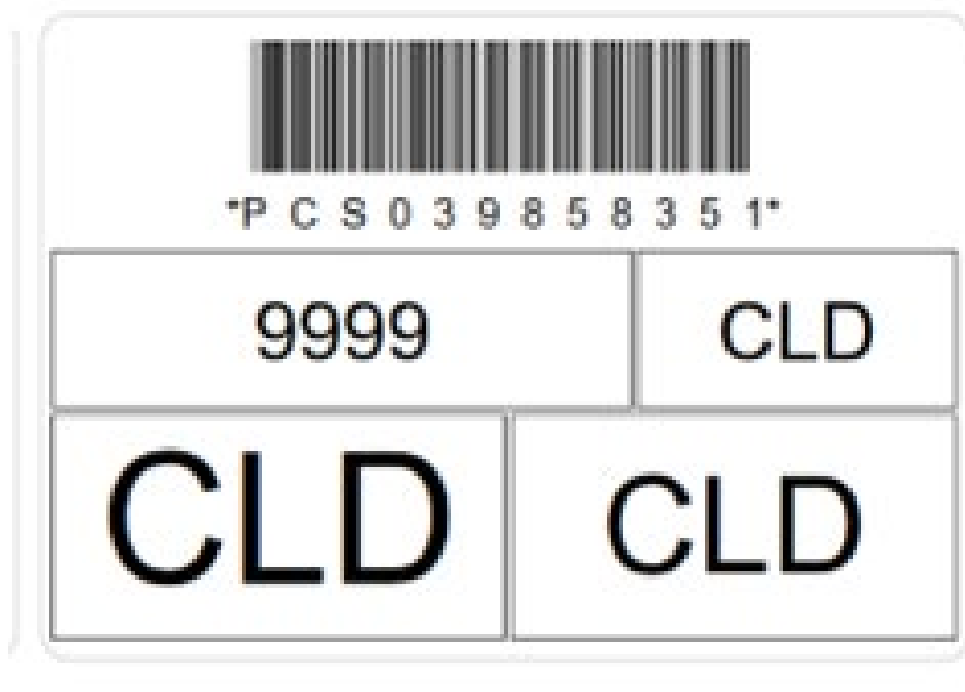
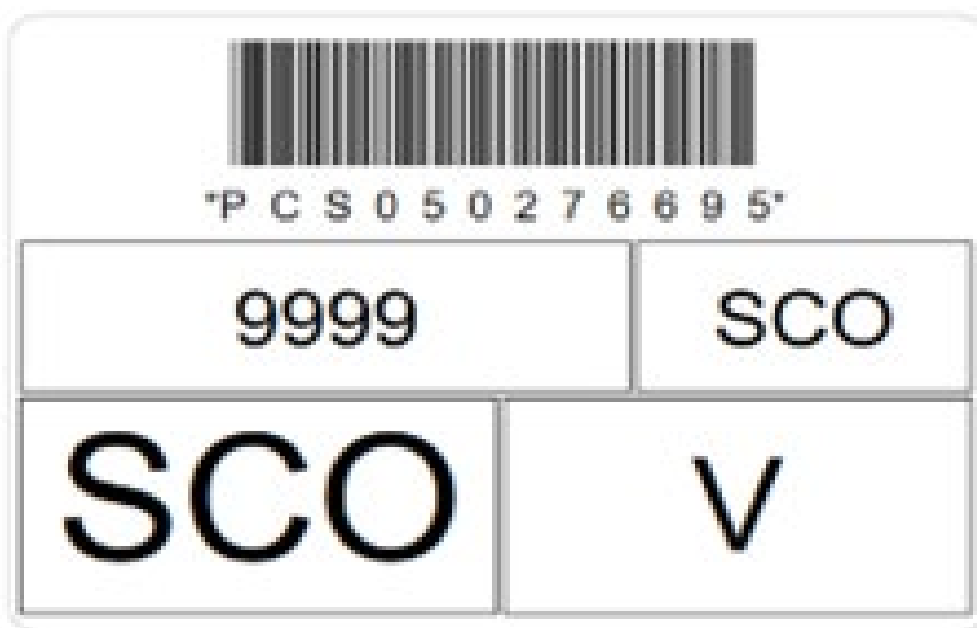
Suspended & Deceased Patients




DMS Patients




Home Nation Transfer Patients




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