

Summary Care Record (SCR) implementation checklist

When community pharmacy contractors go live with SCR, they can use this checklist to help guide them through the process.

NHS Q	Smartcard roles are set up* – Staff accessing the SCR should have specific Smartcard roles enabling access to the SCR. Locums who regularly work at a particular pharmacy can request the specific site pharmacy role is added to their Smartcard (please visit: psnc.org.uk/sc)	
Standard Operation Procedures	Standard operating procedure (SOP) is in place* – The pharmacy team need an SCR SOP. A template is available at: tinyurl.com/scrsop. SCR access could also be integrated into other SOPs.	
	Standard system settings are compliant* – The system must be compliant with the HSCIC Warranted Environment Specification (WES), please visit: psnc.org.uk/wes	
	Face-to-face training event has been attended* – One person per site to have attended a HSCIC or HSCIC approved face-to-face implementation briefing.	
	CPPE online training has been completed* – All pharmacists and pharmacy technicians who will access the SCR must have completed the Centre for Pharmacy Postgraduate Education (CPPE) online SCR training module prior to accessing the SCR.	
	Privacy Officer has been appointed* – The Privacy Officer is responsible for auditing and reviewing the SCR access.	
Information Governance	Information Governance (IG) Toolkit has been submitted* – An IG Toolkit submission must have been made within the last 12 months.	
	N3 connection is present* – If you are EPS-live this will be present already.	
	Trigger the payment of the allowance after confirming that the above steps have been completed – Once the requirements above have been fulfilled a declaration (tinyurl.com/scragreement) is made that the contractor and their team agree to comply with the ongoing requirements for access to the SCR.	
	Access has been checked using test patient – The pharmacy team should check they can access the SCR using the test NHS Numbers provided (these can be found in the sample SOP at: tinyurl.com/scrsop).	
	Patient information is available – The pharmacy team may choose to make patient information materials (posters, leaflets) available at the pharmacy and on the pharmacy website (tinyurl.com/scrdocs)	
	SCR web address has been added to favourites – The pharmacy team may choose to add the SCR URL to their desktop/favourites to make future access quick and easy. The URL required to access the SCR is: https://portal.national.ncrs.nhs.uk/portal/dt (please note a Smartcard is required).	
3-9-32-2 N	Begin using the SCR – Pharmacy teams report that the SCR can be used as an alternative to contacting the GP practice in some scenarios. The Royal Pharmaceutical Society has published a one-page factsheet which explains the scenarios in which to use the SCR (tinyurl.com/scrscenarios). The decision as to when to use SCR is a professional one.	

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For further details on SCR implementation please contact your regional SCR implementation manager

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^{*}These are required to be completed before a community pharmacy contractor can receive the £200 SCR allowance.