Synchronising Client Records

Contents

Overview

The '**Spine'** is the NHS national database containing core information about Clients. Rio, like many Hospital and GP systems links to the demographic part of the Spine known as the NCRS (National Care Record Service) allowing core information to be shared across NHS organisations.

To comply with the law and professional record keeping standards we need to ensure we have accurate, up-to-date information about the Clients in our care. Not having accurate information has an impact on services. For example, not having correct address information means appointment letters go to the wrong address and the Client fails to attend the appointment; not having correct telephone numbers means we can't speak to our Clients when we need to check information, etc.

Synchronising Client records means we have the accurate information we need.

When to Synchronise

An Orange banner will display when the Client's record needs to be synchronised.

The local information for this person is not synchronised with the NCRS. Correct any differences you can and press save, or press next to progress to the next page.

The Orange banner means some of the Client's information (Client Names, Next of Kin, Telephone Numbers, Addresses and GP details) shared between Rio & the NCRS part of the National Spine doesn't match and needs to be synchronised.

What to Synchronise

- Locate and click the **Edit this client** button (bottom of screen)

Edit this client

You will be taken to the first screen displaying information which needs to be synchronised.

- Look at the information displayed

To the **left** is the **Rio** information; to the **right** is the **(NCRS) National Spine** data

Each time you synchronise a Client's record you will need to look closely at all the data and decide which is the correct information.

How to Synchronise

Each piece of information displays with an icon:

	Both Match		Record Differs		NCRS record only		Local record only		Pending update to NCRS		Historic Record

Only information displayed with the **Record Differs**, **NCRS record only** and **Local record only** icons will need to be synchronised.

To the right of each piece of information you will see an **Edit** button, there are three types of Edit button:

Compare and Edit: allows you to view both Rio and NCRS data and decide which is correct

Edit and Retrieve: allows you to select NCRS information and save it to Rio

Edit and upload: allows you to select Rio information and save it to the NCRS

- Click the **Edit** button
- **Select** the data you want to keep ☑

You don't have to select just Local (Rio) or National (NCRS) data, if appropriate you can select a mixture of Rio and NCRS information on the same screen.

If you need to edit any information this must be done on the Local (Rio) side as National (NCRS) information can't be directly edited.

- **Edit** any information (if appropriate) and then select it ☑
- Click the **Save** button (bottom)

When you click **Save** you will be taken to the **next** screen which needs to be synchronised.

When all the information has been synchronised the Client's record will display.

Use the table below for guidance:

Icon	Where is Data	Button	The Rule of thumb
	Rio & NCRS	Compare and Edit	If all the data matches but the date, select the oldest information If the data differs, select the most recent information
	NCRS	Edit & retrieve	Select the NCRS data and save to Rio
	Rio	Edit and upload	If the Rio data is duplicated, select the Local (Rio) information, enter a **Valid to** date and **Save** If the Rio data is not duplicated, select the Rio data & save to National (NCRS)