

## Settings for Subject Access Request Authorisers

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**Note:** The instructions in this section are for System Administrators only.

To create a list of staff members who can authorise SARs:

1. Select **Setup>Users & Policy>Organisation Preferences** from the Main Menu.
2. Select 'Clinical Policy>Subject Access Requests' from the tree. The list of available staff members is shown in the 'Available' section. Those who have been selected to countersign are shown in the 'Selected' section:
  1. Select a staff member's name and either double-click or click to move the staff member to the 'Selected' list.
  2. Select a staff member's name and either double-click or click to remove the staff member from the 'Selected' list.
3. Click **Ok**.

### Recording a Subject Access Request

To record a SAR:

1. Retrieve the patient record.
2. Select the 'Subject Access Requests' node from the Clinical tree. If this node is not already present in your Clinical tree, you will need to add it (see [Amending a Tree Configuration](#)).
3. Do one of the following:
  1. click , or
  2. right -click on the 'Subject Access Requests' node in the Clinical tree and select **New Subject Access Request**.
4. Select the person requesting the information from the **Requestor** drop-down list.

5. Use the **Comments** field to record any notes on the party requesting the information.
6. Specify your response to the request:
  1. **Accepted**
  2. **Refused** – select the reason for the refusal from the drop-down list and record any notes in the **Refusal Comments** field, if applicable. **Tip:** If you want to mark an existing SAR as 'Refused', right-click on the SAR on the Subject Access Requests view and select **Refuse Request**. You cannot mark a request as 'Refused' if it has already been printed and completed.
7. Click **Ok**. The SAR is displayed on the Subject Access Requests view and in the New Journal.

If the SAR was accepted, a 'Subject Access Request' task is created when you save the patient record. **Tip:** Select the 'Appointments, Visits & Tasks>Tasks' node from the tree and then select the **Pending Tasks** tab to view the contents of the task.

## Actioning a Subject Access Request

You can action a SAR from the following locations on SystemOne:

- [From the Patient Record](#)
- [From the Task List](#)

### From the Patient Record

To action a SAR from within the patient record:

1. Retrieve the patient record.
2. Do one of the following:
  1. locate the 'Subject Access Request' task on the Patient Home screen and click the **Action** link, or
  2. double -click on the SAR on the Subject Access Requests view, or
  3. right -click on the relevant SAR on the Subject Access Requests view and select **Action Request**, or
  4. right -click on the relevant SAR in the New Journal and select **Action Request**.
3. Select the **Exclusions** tab from the Subject Access Request window. All data shown in the patient's New Journal is listed and will be provided to the person making the SAR, unless you specifically exclude certain entries.

4. Click the appropriate button(s) to control what information will be provided to the person making the SAR:
  1. **Exclude Private Consultations** – remove all private consultations.
  2. **Exclude Consultations Owned By Other Units** – remove all contacts/consultations owned by other units.
  3. **Exclude Administrative Events** – remove all administrative events.
  4. **Exclude Events Between** – remove all events that fall during a specified period.
  5. **Exclude Consultations By Contact Method** – remove all consultations with a specific contact method, for example 'Telephone'.
  6. **Include All** – reset the window to include all data from the New Journal.
  7.  – manually exclude a specific entry. The  in the **Include** column is replaced by a . **Tip:** If you click the topmost  next to the date, all the entries underneath will be marked with a . If you do not want to exclude all entries under a date, click the individual entries instead.
  8.  – manually reinstate an excluded entry. The  in the **Include** column is replaced by a .
5. Check each entry marked with a  in the **Include** column to make sure it should be provided to the person making the SAR.
6. Click the appropriate button at the top of the window:
  1. **Save For Further Editing** – click **Yes** to confirm that you want to save the changes you have made so far. The status of the 'Subject Access Request' task changes to 'Started'. See [Assigning/Reassigning Tasks](#) for details of how to assign the 'Subject Access Request' task to a user who can authorise SARs.
  2. **Authorise** – approve the SAR. Type any notes in the **Comments** field of the Subject Access Request Authoriser dialog, if applicable, and click **Ok**. Click **Ok** to acknowledge the message that is displayed. The status of the 'Subject Access Request' task changes to 'Authorised'.  
**Note:** You will only be able to authorise a SAR if nominated by a System Administrator (see [Settings for SAR Authorisers](#) for further details).
7. Save the patient record.

See [Printing a Subject Access Request](#) for instructions on how to mark the 'Subject Access Request' task as 'Completed' and print the information to be provided to the person making the SAR.

## From the Task List

To action a SAR from your Task List:

1. Select **Workflow>Task List** from the Main Menu or press **Ctrl+T**.
2. Navigate to the relevant 'Subject Access Request' task in the list displayed.
3. Do one of the following:
  1. right-click on the task and select **Action** from the right-click menu, or
  2. click .
4. Follow Steps 3 to 7 above.

## Printing a Subject Access Request

To print out the relevant data to give to the requestor and mark the associated 'Subject Access Request' task as 'Completed':

1. Retrieve the patient record.
2. Select the 'Subject Access Requests' node from the Clinical tree.
3. Double -click on the relevant SAR. The Subject Access Request window is displayed.
4. Select the **Exclusions** tab and check each entry marked with a  in the **Include** column to make sure it should be provided to the person making the SAR.
5. Click **Print and Complete** when you are ready to print the SAR. The data is displayed in your word processing program, for example Microsoft Word, ready for printing.

To print out a copy of information already provided in response to a SAR:

1. Retrieve the patient record.
2. Select the 'Subject Access Requests' node from the Clinical tree.
3. Double -click on the relevant SAR or right-click and select **View Request**. The Subject Access Request window is displayed.
4. Check the **Details** tab to view a history of the work done on the SAR.
5. Click **Print**. The data is displayed in your word processing program, for example Microsoft Word, ready for printing.

## Viewing Details of Subject Access Requests

To view detailed information about a SAR:

1. Retrieve the patient record.
2. Select the 'Subject Access Requests' node from the Clinical tree.
3. Check the **Status** column:
  1. **Not Started** – the request has been recorded and accepted
  2. **Updated** – the request has been updated by a user and the changes saved
  3. **Authorised** – the details to be provided to the person requesting the SAR have been specified and the SAR has been authorised
  4. **Completed** – the SAR has been printed out and the associated 'Subject Access Request' task has been marked as 'Completed'
4. Double -click on the relevant SAR or right-click and select **View Request**. The Subject Access Request window is displayed.
5. Check the **Details** tab to view a history of the work done on the SAR.
6. Select the **Exclusions** tab to view the details that are to be/have been included in the SAR (indicated by a tick in the **Include** column).
7. Click **Print** to print out a copy of the details provided in response to the SAR. See [Printing a Subject Access Request](#) for further details on how to action a SAR that has been approved but not yet completed.