



SINGLE ASSESSMENT PROCESS FOR OLDER PEOPLE

CURRENT SUMMARY RECORD (formerly known as the Single Assessment Summary)

INTRODUCTORY NOTE

Explanation of the Current Summary Record

The Current Summary Record (CSR) draws on information from a range of sources to provide an up-to-date picture of the older person, their health and care needs and any services they receive

The CSR is the means by which case information on an individual older person is stored and shared, subject to consent and confidentiality, among health and social care professionals. It draws on information collected during the assessment process but also covers care planning information including support and services that are being provided. It can draw on other sources and should show changes in needs, services and other circumstances between formal assessments.

The CSR used to be called the Single Assessment Summary. This title might have led some localities and professionals to perceive the Single Assessment Summary as simply a summary of the most recent assessment information. This was never the policy intention. Unlike an assessment, which will be fixed in a point in time, the CSR should show the most up-to-date information.

Immediately after an assessment the CSR may rely entirely on information from that assessment. However, before the next formal assessment, it is very likely that the information on the CSR will be updated.

Detailed assessment information, say from contact, overview and specialist assessment should be held on electronic or paper files as a record of formal assessment activity at a point in time. From time to time, all or parts of this detailed assessment information may need to be shared between professionals and/or across agencies. However, the Department believes that the CSR provides a summary collection of information that could be most helpfully shared in the first instance. Unlike information from a period of formal assessment, the information on a CSR is likely to be wider and more current.

Worked example

The worked example of the CSR, which may be accessed by clicking on the link immediately below, brings together all the data items that the Department of Health would expect to see NHS bodies and councils make available to each other on a routine basis. It is likely that, in most cases, the information for the CSR will be built up over time. It would be rare for all of the data items to be completed in the immediate aftermath of an older person being referred to health or social care agencies for the first time. (The CSR below duplicates the worked example of the Single Assessment Summary that was placed on the SAP website in January 2004. (The only difference is the title and the first note on page 8.) The CSR continues to be based on Annex I of the January 2002 SAP guidance.)

➤ Current Summary Record (SAS) – worked example - April 2004

Localities' approaches to assessment should be able to provide the basic personal information and assessment-related information required by the CSR in the first instance. They should be prepared, however, to ensure that information from different sources can be used to update the CSR between formal assessments.

Some assessment tools, that combine care planning and service information, may obviate the need for a separate CSR as they could provide a ready means of compiling the CSR. Localities should guard against asking professionals to record information for assessment purposes and then again for the CSR. Obviously, electronic systems that can populate the CSR from information collected from assessment and other forms and sources will be the most cost-effective approach.

Underlying datasets

Underlying datasets for the CSR are being finalised by the NHS Information Authority in partnership with the Department of Health and in collaboration with a range of stakeholders representing health and social care agencies and professionals. Although the SAP dataset will not be finalised until the summer of 2004, localities can use the CSR with confidence as the data items included on it are unlikely to change. (It is the codes that are being finalised.)

Despite the availability of datasets to support the CSR, localities may wish to treat the CSR as a document not a dataset.

Electronic and paper formats

In electronic formats, the CSR may be a set of screens that automatically feed off other electronic documents such as completed assessment forms or routine monitoring or change forms. A paper version may be produced when the content of these screens is printed. Where electronic systems are not in use, the CSR may inform how paper files are constructed.

Implementation of Electronic CSR

Further work is needed to implement the CSR as an integral part of the NHS Care Records Service. Discussions are underway with the National Programme for IT to progress the electronic implementation of the CSR.