

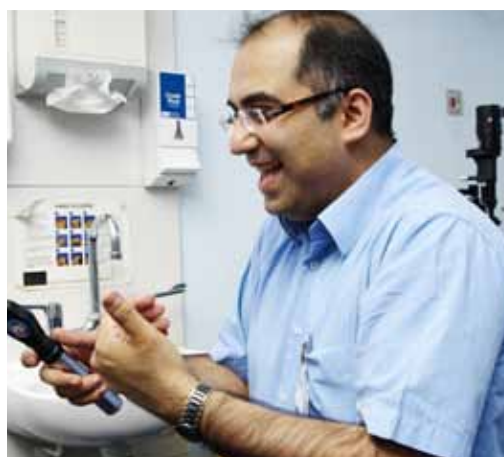


Commissioning Board
A special health authority

Securing excellence in commissioning
primary care: Annex 2

Tasks and functions

June 2012



Tasks and functions

The following tables set out the tasks required to commission primary care and then manage primary care contracts. These tasks will be discharged by the NHS Commissioning Board through its national, regional and local area teams. This is a working document and subject to constant development and refinement.

The tasks are described under the four broad functions shown below and are split by team responsibility and across the four contractor groups:

- **Planning** the optimum services to meet national standards and local ambitions (pages 3 to 5)
- **Securing** services through the contracting route which delivers the best quality and outcomes (page 6 to 7)
- **Monitoring**, assessing and, where necessary, challenging quality and outcomes, including arrangements for contract management (pages 8 to 11)
- Other important **transactional functions** which underpin the commissioning cycle (pages 12 to 16)

There are four further groups of specific tasks in relation to managing primary care, included in the tables at page 17 onwards:

- Performers list management and control of market entry and exit
- Management accounting
- Patient, GP list and medical record management
- Cervical and breast screening call and recall

Details in relation to other tasks will be added as they are developed or required, including, for example, those relating to premises and information technology.

[This document remains subject to further discussion as the operational arrangements become clearer.](#)

Planning Services

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> Develop the primary care strategic response to the government mandate, incorporating; local experience, national expertise, patient insight, innovation and performance requirements Develop and agree outcome frameworks Determine total budget requirements for all primary care services, including premises and information technology Develop commissioning policy and guidance (for example, in relation to practice areas and boundaries) Aggregate the outcomes of joint strategic needs assessments 	<ul style="list-style-type: none"> Negotiate national contracts including any enhanced services Maintain regulations and directions, including statements of financial entitlements, to implement contract changes 	<p>Dentistry</p> <ul style="list-style-type: none"> Negotiate the dental contract, associated statements of financial entitlements, regulations and directions Develop national policies and processes for the implementation of the new dental contract in preparation for local implementation <p>Pharmacy</p> <ul style="list-style-type: none"> Negotiate the community pharmacy contractual framework Work in partnership with the Department of Health on medicine pricing, underpinning the delivery of parts of the community pharmacy contractual framework, professional leadership for medicines optimisation and pharmacy strategy Manage the implementation of and on-going support for Electronic Prescribing Service phase 2
Local area team function	<ul style="list-style-type: none"> Ensure that primary care is integrated into local joint strategic needs assessment planning processes 	<ul style="list-style-type: none"> Agree practice areas and boundaries in collaboration with clinical commissioning groups 	<p>Dentistry</p> <ul style="list-style-type: none"> Undertake service reviews/ health needs assessments in relation to general dentistry and additional services

Continued

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function	<ul style="list-style-type: none"> • Develop the local response to health and wellbeing and clinical commissioning group strategies • Engage and consult with key stakeholders, including patients, carers and the public in relation to priority areas for improvement • Undertake service reviews • Agree procurement plans • Support any procurements 		<ul style="list-style-type: none"> • Identify any gaps in the provision of general dentistry and additional services from local health needs assessment and national or local targets • Ensure that workforce planning aligns with local commissioning plans, linking to the deanery and Health Education England <p>Pharmacy</p> <ul style="list-style-type: none"> • Support the development of the pharmacy needs assessment by health and wellbeing boards • Determine whether an area is rural in character, producing and maintaining maps of controlled localities and reserved locations • Develop local pharmaceutical services specifications to meet identified local needs in partnership with stakeholders • Develop, as appropriate, enhanced services with local authorities and clinical commissioning groups to meet local need

Continued

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function			<ul style="list-style-type: none"> • Maintain a list of dispensing doctors, deal with applications to dispense, and define controlled localities and reserved locations • Determine applications from patients who wish to receive pharmaceutical services from their doctor • Performance manage dispensary services quality scheme in local dispensing doctors' practices

Securing Services

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> • Develop and negotiate contracts, commissioning frameworks, policies, procedures, guidance and processes • Provide national guidance to local area teams on contractual consistency • Approve the annual procurement plan • Develop standard service specification documentation and tender templates • Expedite fast track adoption and spread of innovation 		<p>Dentistry</p> <ul style="list-style-type: none"> • Lead the development of dental care pathways, associated service specifications and quality standards <p>Pharmacy</p> <ul style="list-style-type: none"> • Develop standard local pharmaceutical services contracts • Manage dispensing appliance contractors' contractual arrangements • Develop and issue systems and processes for disposal of unwanted medicines
Local area team function	<ul style="list-style-type: none"> • Use standard frameworks to secure services and ensure good value for money • Support providers to ensure optimum delivery • Initiate formal procurement activity for each scheme, within terms of any national procurement support • Sign off and finalise contracts with the preferred bidder • Agree/ implement the local mobilisation plan 	<ul style="list-style-type: none"> • Make provision for emergency primary medical care services in the event of an unforeseen circumstance • Negotiate, in partnership with clinical commissioning groups, a quality improvement plan with each practice • Procure primary care services in line with the agreed commissioning strategy • Secure any enhanced services 	

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	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function	<ul style="list-style-type: none"> Communicate with local stakeholders as required Undertake appropriate checks prior to service commencement (for example, premises inspection) 	<ul style="list-style-type: none"> Populate schedules in personal medical services and alternative provider medical services contracts (for example, premises, information technology, service specifications and finance) Discuss locally the provision of additional services (where practices wish not to undertake them) with clinical commissioning groups 	

Monitoring Quality and Outcomes, including Contract Management

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> Develop and maintain policies and procedures in line with regulations Develop processes and systems to ensure fair, open and transparent decision making in line with regulations, guidance, contractual documentation and governance arrangements Oversee nationally all primary care commissioning contract compliance and performance Develop and advise on contract type and documentation for new services Produce and issue national standard contract variations in line with changes to regulations Develop performance management frameworks, including policy and procedures, to ensure contract performance is reviewed in line with the national operating model Produce the format for remedial and breach notices Develop contract termination documentation, systems and processes 	<ul style="list-style-type: none"> Triangulate the performance of practices as commissioners with that of them as providers to assess overall improvement against quality parameters 	<p>Dentistry</p> <ul style="list-style-type: none"> Supply analysed dental performance data sets as described in the performance framework, including key performance indicators for personal dental services and personal dental services plus contracts Develop and issue systems and processes to monitor performance against additional services included in the contract and to identify outliers with regard to performance Ensure best practice is adopted across the NHS Commissioning Board Provide a vehicle for NHS Commissioning Board local area teams to share quality improvement and innovative practice Establish and develop links to research and other quality evidence bases <p>Pharmacy</p> <ul style="list-style-type: none"> Monitor advanced services medicine user review and new medicine service activity at provider level and ensure responsive payment triggers <p>Optical</p> <ul style="list-style-type: none"> Issue guidance for the provision of: <ol style="list-style-type: none"> Sight tests Vouchers Domiciliary visits, notifications and payments

Continued

Monitoring Quality and Outcomes, including Contract Management

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> Monitor progress against both the commissioning outcomes framework and the suite of primary care performance frameworks Oversee management processes and outcomes in local area teams to ensure the necessary consistency of a single national approach 		<ul style="list-style-type: none"> d) Repairs and replacements e) Retinal screening f) Consultation, education and training grants g) Cataract choice scheme h) Counter fraud checks i) Post payment verification to opticians on a three yearly cycle
Local area team function	<ul style="list-style-type: none"> Exercise judgment, discretion and proportionate response Quality assure primary care Implement decision making systems and processes across all contracts Maintain the contractor data base, including hard copies of all signed contracts for primary care providers, pertinent to the geographical area covered by the local area team (including contract variations and breaches) Receive and consider contract applications in line with national policies and procedures 	<ul style="list-style-type: none"> Quality assure, with CCGs where appropriate, the quality of primary medical care Implement decision making systems and processes across all contracts Assess practice performance from analysed data and identify priorities for further interrogation In collaboration with clinical commissioning groups, establish any cause for concern and act accordingly, including a quality review where necessary 	Dentistry <ul style="list-style-type: none"> Develop clinically led quality improvement plans to reflect local priorities Establish clinical peer review and clinical engagement processes across all providers and performers Support the adoption of clinically identified best practice at a local level Review practices identified as outliers and develop and implement appropriate action plans Conduct regular performance reviews Conduct annual contract compliance and performance review activities Establish appropriate local peer review and peer support mechanisms

Continued

Monitoring Quality and Outcomes, including Contract Management *Continued*

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function	<ul style="list-style-type: none"> Produce and issue local contractor specific variations (including, partnership changes, relocations, and mergers) Implement changes to relevant systems to contractor payments Report contract variations to national support team through single reporting system Raise contract variations which may have a significant impact on the delivery of patient services and finances with localities and commissioners Conduct contractual compliance and quality reviews, developing and agreeing action plans to address performance issues with contractors Liaise with the Care Quality Commission and carry out applicable actions to support registration Collate compliance reports Localise breach notices to reflect areas of concern Issue remedial/ breach notices as notified through the performance/ governance processes 	<ul style="list-style-type: none"> Oversee any contractual requirements post quality reviews Draft the annual report on performance Undertake a quarterly review of alternative provider medical services contracts (including reconciliation of payments in relation to performance) and personal medical services list size adjustment Support each clinical commissioning group in the development of a primary medical care quality improvement strategy involving all practices Support practices and performers in the achievement of their quality improvement plan 	Pharmacy <ul style="list-style-type: none"> Develop clinically led quality improvement plans across all pharmaceutical services and services commissioned from community pharmacy, including essential clinical governance, advanced and enhanced services from pharmacies, and terms of service, clinical governance and advanced services for dispensing appliance contractors Develop clinical engagement approaches with embedded quality improvement processes for influence by all local providers Implement and manage the audit programme, public health campaigns and local signposting of information Process changes to contracted hours, including applications to vary core hours, and notifications of changes to supplementary hours Manage the local electronic prescription service nomination process, including the provision of smartcards Provide pharmacy rotas Implement advanced pharmacy services Undertake the routine monitoring of advanced services, handling declarations and returns (for example, for new medicines)

Continued

Monitoring Quality and Outcomes, including Contract Management *Continued*

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function	<ul style="list-style-type: none"> • Ensure the development of required action plans by contractors in response to remedial and breach notices, and that these are monitored and actions are addressed • Update the contractor database with sanction information • Determine the appropriateness of contract termination and agree with the national team • Issue termination notices • Develop action plans to manage termination of contracts and implement in consultation with and supported by stakeholders • Implement changes to contractor payments using the relevant systems • Update contract databases to advise the central team of contract variations • Monitor activity on performers lists alongside practice performance data to generate a complete picture of quality 		<ul style="list-style-type: none"> • Monitor compliance with the Community Pharmacy Assurance Framework and provide appropriate information to medicines optimisation leads <p>Optical</p> <ul style="list-style-type: none"> • Conduct annual performance review activities (paper based unless performance is such that it further work is required)

Transactional Functions

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> • Make physical payments to contractors • Manage the professional alerts circulation and cascade of alerts • Monitor and regulate changes to NHS forms and notify such changes to the local area teams • Undertake national contract management and contract negotiation (for example, in relation to forms and national courier contracts) and ensure value for money • Develop national operational procedures (for example, nomination policy for Electronic Prescription Service, access to NHS services where patients travel abroad) • Develop a systematic contractor database, including electronic copies of all signed contracts for primary care providers 	<ul style="list-style-type: none"> • Calculate/pay global sum, minimum practice income guarantee, personal medical services, alternative provider medical services contractors monthly contract value • Pay quality and outcomes framework aspiration/ achievement • Supply the analysed primary care common data set as described in the performance framework • Administer the pension scheme 	<p>Dentistry</p> <ul style="list-style-type: none"> • Issue dental refunds to patients (via the NHS Business Services Authority) • Manage (via the NHS Business Services Authority) payments for pensions to contractors and additional payments under the statement of financial entitlements (including, for example, rates and maternity payments) <p>Pharmacy</p> <ul style="list-style-type: none"> • Provide an online claims system for contractors to submit claims (and then input to the NHS Business Services Authority) • Manage interdependencies between the pharmaceutical services budget and prescribing drug budgets (for example, category M drug tariff, and the pharmacy pricing regulatory scheme) • Circulate information on stolen prescriptions and other cascades

Continued

Transactional Functions

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function	<ul style="list-style-type: none"> Coordinate access to legal advice required by the NHS Commissioning Board on regulation and contract issues and ensure local area teams receive consistent direction and support Ensure that counter fraud measures are in line with the commissioned payment function 		Optical <ul style="list-style-type: none"> Lead budget setting, monitoring and reporting, including the production of statutory returns Download payment information from the central payment system Process general ophthalmic services claims (including sight tests, vouchers, repairs and replacements, and private sight tests) Approve domiciliary notifications and process claims in respect of actual visits Process payments for any enhanced services (for example, cataract choice, diabetic eye screening and retinal screening) if required Process continuing education and training allowances in respect of contractors Authorise and issue optical refunds to patients Undertake the post payment verification process Administer the pension scheme for optical medical practitioners

Continued

Transactional Functions *Continued*

	Applicable to all	Medical	Dentistry, pharmacy and optical
National / regional support function			<ul style="list-style-type: none"> For suspended contractors: ascertain the individual's entitlements, advise the contractor, validate all documentation, and adjust payment accordingly
Local area team function	<ul style="list-style-type: none"> Order and maintain adequate stock to ensure that contractor orders can be fulfilled (for example, NHS forms, prescriptions, needles and syringes) Record stock provided to individual contractors to enable monitoring of cost and appropriate audit trail of controlled stationery Ensure systems are in place to record serial numbers of prescriptions issued to individual contractors and to obtain signature of receipt on delivery Ensure controlled destruction of personalised forms returned from contractors 	<ul style="list-style-type: none"> Agree opt outs from the general medical services contract Lead budget setting, monitoring and reporting of contractual payments Agree appropriate contract variations (for example, list size changes) including their input to payment systems Calculate any agreed local quality and outcomes framework arrangement Calculate the impact of key performance indicators on contractual payments (alternative provider medical services contracts) 	Dentistry <ul style="list-style-type: none"> Lead budget setting, monitoring and reporting, including the production of statutory returns Negotiate personal dental services and general dental services contracts with providers Set up and adjust contractor and performer information for on-line dental payments Download payment information from central payment systems Calculate and pay (via the NHS Business Services Authority) variations for claims in respect of personal allowances

Continued

Transactional Functions *Continued*

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function	<ul style="list-style-type: none"> • Provide local courier services for the delivery and collection of contractor supplies • Provide courier services to and from GP practices for the delivery and collection of medical records • Pay over/ administer levies on behalf of local representative committees • Manage Freedom of Information Act requests 	<ul style="list-style-type: none"> • Determine entitlements to personal allowances (for example, seniority/ locum reimbursement) • Calculate appraisal payments due to appraisers and appraisers • Calculate and pay enhanced services that are specified nationally • Calculate payments for GP registrars in respect of salary, mileage and travel grants • Calculate prescribing and dispensing drug payments • Calculate entitlements under the GP retainer/ GP returner and flexible career schemes • Calculate payments in respect of the dispensary service quality scheme • Administer superannuation regulations, including all deductions, in relation to joiners, leavers, retirements, increased benefits, adjustments and pay these to the pensions division • Administer and validate GP annual certificates 	<ul style="list-style-type: none"> • Process (via the NHS Business Services Authority) reimbursements in respect of non-domestic rates and section 63 travel expenses • Authorise dental refunds to patients • Administer (via the NHS Business Services Authority) dental superannuation, including the approval of annual superannuation declarations • In the case of suspended practitioners: ascertain the individual's entitlement, advise the contractor, validate all documentation, and adjust payment accordingly • Provide financial input into the negotiation of out of hours contracts, on-going contract management and the authorisation of payments due • Calculate payments due in respect of dental vocational trainees and trainers • Undertake the annual review of the financial impact of dental underperformance, including the negotiation of claw back with contractors • Monitor (via the NHS Business Services Authority) patient charge revenues and their impact on the financial position

Continued

Transactional Functions *Continued*

	Applicable to all	Medical	Dentistry, pharmacy and optical
Local area team function		<ul style="list-style-type: none"> • Administer GP locum and GP solo contributions • Provide the NHS pension assurance statement • For suspended contractors, ascertain the individual's entitlements, advise the contractor, validate all documentation, and adjust payment accordingly • Download payment information from central payment systems • Issue notification of stolen prescription forms or persons attempting to obtain drugs by deception, to GPs, pharmacists, counter fraud, drug squads and other interested parties • Monitor closed lists 	Pharmacy <ul style="list-style-type: none"> • Lead budget setting, monitoring and reporting including the production of statutory returns • Process claims for enhanced services and other payments where the NHS Commissioning Board is the commissioner, and record the payment details on the relevant online system • Make detailed statements available to contractors so that payments received can be reconciled back to individual claims • Handle payment related contractor queries (for example, errors in practice payments, and prescription switching) • Undertake post payment verification of enhanced services/ prescriptions • Consider applications and process payments (for example, top up payments, pre-registration grants, trainees, essential small pharmacy local pharmaceutical services out of hours, and local payments such as advances on account, including high cost prescriptions) • Manage the submission of information required by Secretary of State (for example, pharmacy certificate of analysis, certificate of conformity, or data on advanced services)

Other Tasks

	Performers list management and market entry and exit	Management accounting
National / regional support function	<ul style="list-style-type: none"> • Develop policies, processes and systems to ensure the high quality of professional performers in line with regulations and guidance • Maintain an up to date performer list publication • Develop a complaint policy and process • Develop and issue the system and processes for determining applications submitted under the National Health Service (Pharmaceutical Services) Regulations 2005, as amended • Develop a single procedure for making determinations on market entry and exit for consistent implementation by local area teams • Manage dispensing appliance contractor applications 	<ul style="list-style-type: none"> • Provide financial support for national contract negotiations including appropriate benchmarking reviews • Provide strategic financial planning advice regarding total budgetary requirement over the short and medium term • Consolidate and report total primary care financial performance • Manage the provision of a contractor payments system for use by national and local area teams (payment systems are expected to be maintained in their current form in the short term, with the intention of moving towards a single national platform for contractor payments) • Manage the provision of the financial ledger system for use by national and local area teams • Support local area teams in procuring new and replacement services to national standards and processes
Local area team function	<ul style="list-style-type: none"> • Implement systems and processes to ensure the high quality of professional performers in line with regulations and guidance (including, suspensions, conditional inclusions and removals) • Ensure effective case management, including local investigations • Develop processes and systems to ensure fitness to practice (including appraisal and revalidation) • Implement appraisal and revalidation processes 	<ul style="list-style-type: none"> • Lead budget setting, financial monitoring and reporting processes for all areas of primary care expenditure and running costs of the local area teams • Complete monthly financial returns and statutory financial returns as determined • Evaluate the financial impact of contract performance including assessment of forecast outturn position • Produce the annual cash flow forecast, updated on a monthly basis to reflect the impact of contract performance and agreed contract variations

Continued

	Performers list management and market entry and exit	Management accounting
Local area team function	<ul style="list-style-type: none"> • Manage the performer list application process for medical, dental and ophthalmic performers including GP registrars and dental trainees, ensuring satisfactory Criminal Records Bureau and fitness to practice checks • Ensure the attachment of new performer to a practice where relevant and the completion of all appropriate administrative support tasks • Conduct fitness to practice checks for pharmacists and use fitness to practise powers where concerns are raised • Process pharmacy applications including checking applications, liaising with applicants, consultation arrangements and preparation of documentation for consideration • Process change of pharmacy status arrangements • Manage control of entry applications within the nationally developed framework and procedures • Undertake the appeals processes for control of entry applications, including the provision of information to the NHS Litigation Authority • Carry out Criminal Records Bureau checks when required for advanced or enhanced services being commissioned by the NHS Commissioning Board • Manage complaints 	<ul style="list-style-type: none"> • Maintain contract finance schedules and ensure system budgets are updated accordingly • Ensure reported expenditure reconciles with contract payment schedules • Provide financial support for efficiency reviews • Provide financial support for local service developments • Provide financial advice to budget holders • Provide advice in relation to standing financial instructions, standing orders and scheme of delegation • Provide financial input to contract negotiations • Procure new and replacement services to national standards and processes • Administer applications for personal allowances (for example, seniority), determine entitlements and input into relevant payments systems • Validate and calculate entitlements in respect of local professional committees • Download local payment information from central payment systems • Manage the capital programme for the local area team

Other Tasks

	Patients, GP lists and medical records	Cervical and breast screening call and recall services
Local area team function	<ul style="list-style-type: none"> • Manage transactions for patient registrations, including setting up and maintaining electronic links with GP practices • Resolve GP Links queries and registration issues • Ensure patients unable to gain voluntary registration are assigned to the list of a practice • Develop and administer the violent patient scheme • Amend patient registration records (including gender reassignment, adoptions, and witness protection) • Remove patients from practice lists, following receipt from the practice, including violent patients • Deduct patients from practice lists, following notification, including deaths and removals • Process anomalies and investigate duplicates/ unmatched transactions – liaise with National Back Office, Personal Demographics Service and primary care commissioning/ local counter fraud services as appropriate • Monitor electronic and paper transactions received and sent as part of the registration process to ensure all transactions are complete and any anomalies fully resolved • When practices cease to provide services, advise patients, retrieve medical records and reallocate as patients register with new practices • Close registration at the end of the quarter and generate capitation counts to inform payment to GPs 	<p>Cervical screening</p> <ul style="list-style-type: none"> • Ensure the inclusion of all eligible women aged 25 years to 64 years into the cervical screening programme • Invite and remind eligible women to attend for screening after checking the appropriateness of the invitation with the woman's GP practice • Record test results and notify women of their results in writing • Ensure women are recalled for further screening at appropriate routine recall intervals, or earlier if recommended by the laboratory • Notify GP practices of any woman failing to respond to invitations • Ensure that copies of screening histories are transferred between NHAIS/NHS Connecting for Health Systems and Service Delivery Systems when a women moves to live in another area • Action cease requests • Participate in audits to improve the cervical screening pathway • Participate in local screening network meetings and training • Participate in rollout plans for new national screening programmes, including Human Papilloma Virus (HPV) screening

Continued

	Patients, GP lists and medical records	Cervical and breast screening call and recall services
Local area team function	<ul style="list-style-type: none"> • Issue registration documentation to patients, for example medical cards, and inform them of their NHS number • Action specific requests (for example, missing persons, research and donor information) • Inform patients of significant changes to practice arrangements and/or bulk transfer patients following GP resignation/retirement • Maintain the accuracy and integrity of the GP patient registration database and deal with all queries, ensuring that notifications of changes to patient details are recorded • Handle requests for disclosure of performance indicators • Tackle practice list size inflation • Reconcile NHAIS/NHS Connecting for Health Systems and Service Delivery data with that held on GP practice systems • Provide list size information • When a patient registers with a GP practice, obtain their medical records and forward to that practice as soon as possible • Ensure processes are in place to monitor outstanding medical records from GPs and others, issuing reminders where appropriate • Where a GP practice advises that they need the medical records as a matter of urgency, take steps to expedite the transfer 	<p>Breast screening</p> <ul style="list-style-type: none"> • Ensure that all eligible women are identified and their details notified to the breast screening office to enable invitations to be sent • Process batch specifications received from the breast screening office to determine the cohort of women to be invited for screening • Record attendance for screening notified by the breast screening office on the NHAIS/ NHS Connecting for Health Systems and Service Delivery systems • Transfer screening records when a woman moves to live in another area • Notify the breast screening office of any changes to GP practice or patient registration details recorded on the NHAIS/ NHS Connecting for Health Systems and Service Delivery systems • Participate in audits to improve the screening pathway • Participate in screening network meetings and training

Continued

	Patients, GP lists and medical records	Cervical and breast screening call and recall services
Local area team function	<ul style="list-style-type: none"> Recall medical records for patients no longer registered with a GP practice and arrange for their secure storage and retention in accordance with Records Management: NHS Code of Practice Ensure that applications for access to medical records by patients or their representatives are dealt with and, where appropriate, copies are provided to the applicant within 40 days of receipt of the request Provide medical records for patients registering with the NHS for the first time 	