

A Quick Reference Guide to Registering a Patient in England

This is a step by step guide to adding a new patient to **Vision 3** in England.

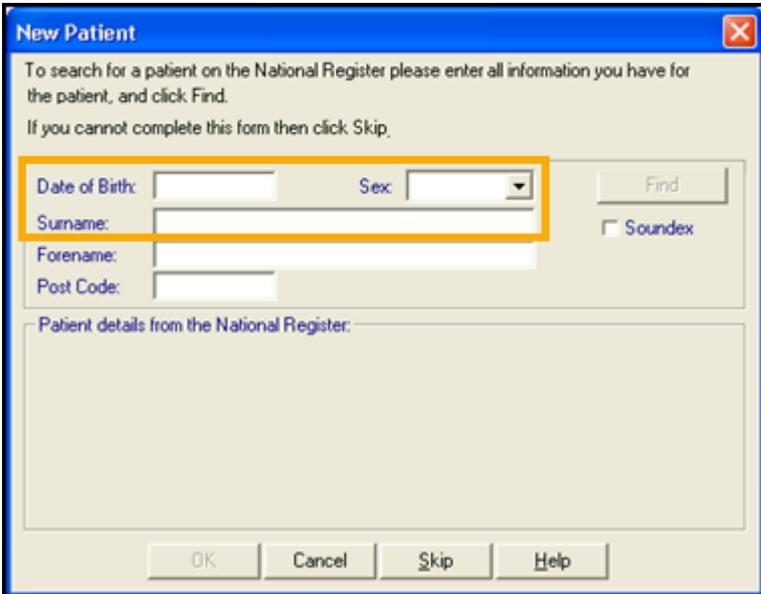
i Important - You must be logged on to **Vision 3** with your Smartcard to use the PDS and enable GP2GP transfer of records. Your Smartcard must have the appropriate RBAC permissions.

In England, before you can add a patient to **Vision 3**, you must trace them via the **Patient Demographic Service (PDS)**. Once their details are located, they can be registered to your practice.

To register a new patient:



1. From **Registration**, select **New Patient** .
2. The **New Patient** screen displays:



New Patient

To search for a patient on the National Register please enter all information you have for the patient, and click Find.
If you cannot complete this form then click Skip.

Date of Birth: Sex:

Surname:

Forename:

Post Code:

Soundex

Patient details from the National Register:

3. Enter the patient details as required:

 **Note** – You must complete all mandatory information unless you have the patient's NHS Number.

- **Date of Birth** - Mandatory, any conventional format can be used, **Vision 3** arranges the numbers into the PDS required format (DD/MM/YYYY).
- **Sex** - Mandatory
- **Surname** - Mandatory
- **Forename**
- **Postcode** - This must be in full, for example, SW8 3QJ

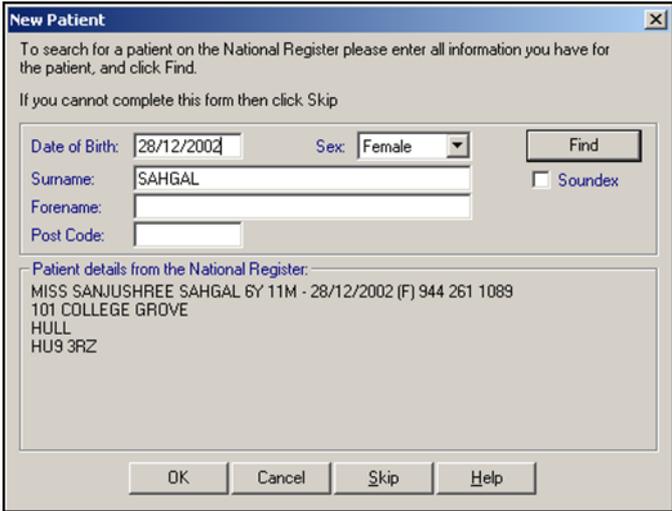
 **Note** – Tracing on postcode searches all current addresses stored in the PDS. In an advanced trace, both current and historic addresses are searched.

4. Select **Find**  to trace the patient on the PDS.

5. One of the following scenarios can occur:

Single patient found on the PDS

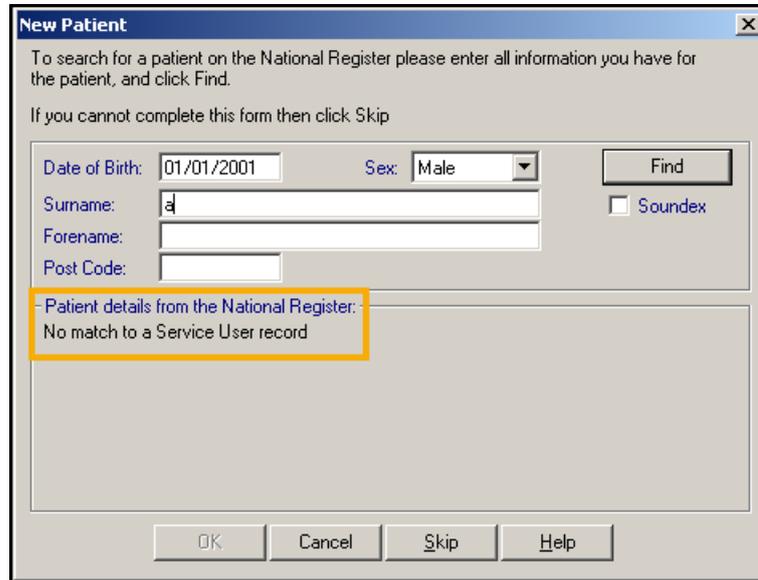
If only one patient is identified from the PDS search, the full patient record is retrieved. If the returned NHS Number already exists on your system, you are given the option of editing the existing patient or returning to the **New Patient** screen:



Select **OK**.

Single Patient not found on the PDS

If a patient is not found the 'No Match to a Service User Record' message displays:



You have two options:

- Find out more information from the patient and attempt another trace (recommended).



Remember - Use the postcode for the patient's previous address.

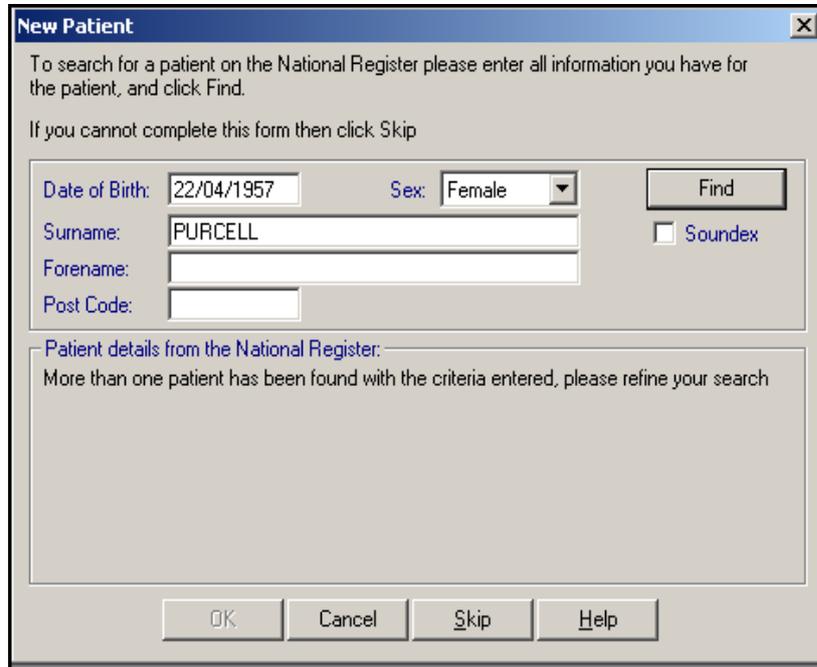
- Register the patient locally to **Vision 3** by selecting **Skip** .



Important - This is a last resort. The patient is not initially synchronised with the PDS which impacts access to the National Services and the GP2GP record transfer.

Multiple PDS Matches Returned

If your trace matches with more than one patient the 'More than one patient has been found with the criteria entered. Please refine your search' message displays:



New Patient [X]

To search for a patient on the National Register please enter all information you have for the patient, and click Find.

If you cannot complete this form then click Skip

Date of Birth: 22/04/1957 Sex: Female Find

Surname: PURCELL Soundex

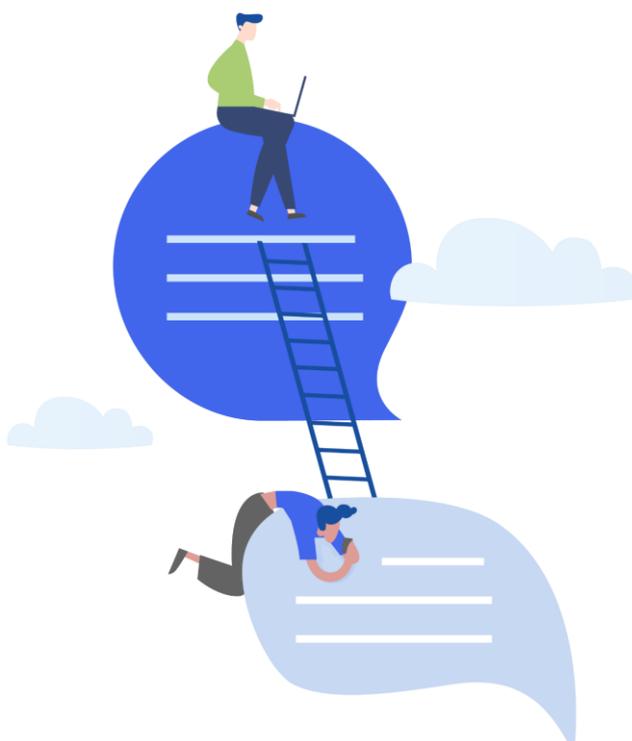
Forename: _____

Post Code: _____

Patient details from the National Register:

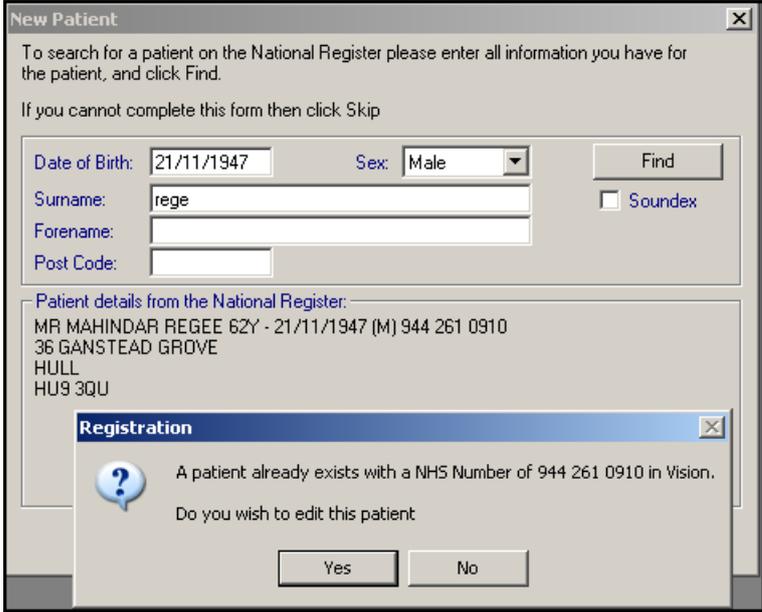
More than one patient has been found with the criteria entered, please refine your search

OK Cancel Skip Help



NHS Number Already Exists on Vision 3

If the NHS number of the matched patient already exists on **Vision 3**, the 'A patient already exists' message displays:



New Patient

To search for a patient on the National Register please enter all information you have for the patient, and click Find.

If you cannot complete this form then click Skip

Date of Birth: 21/11/1947 Sex: Male Find

Surname: rege Soundex

Forename:

Post Code:

Patient details from the National Register:
 MR MAHINDAR REGEE 62Y - 21/11/1947 (M) 944 261 0910
 36 GANSTEAD GROVE
 HULL
 HU9 3QU

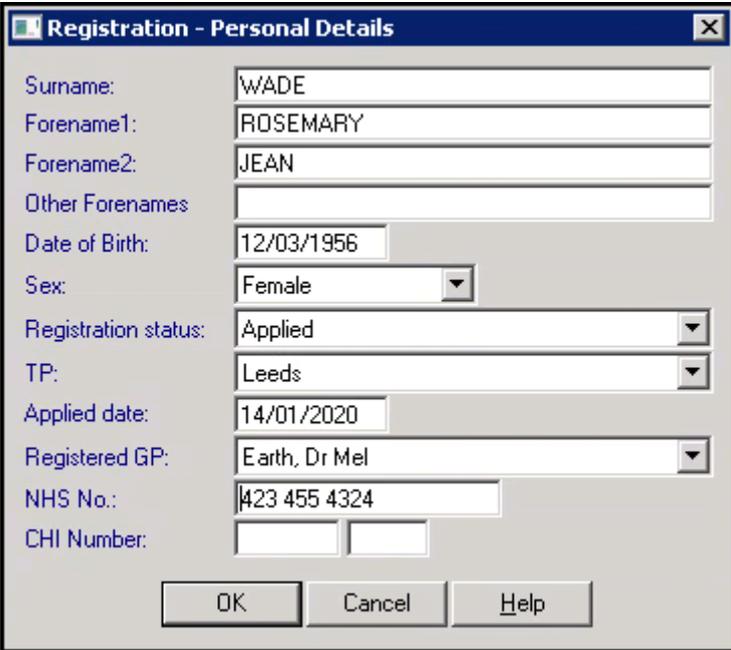
Registration

? A patient already exists with a NHS Number of 944 261 0910 in Vision.
 Do you wish to edit this patient

Yes No

Select **Yes** to update the existing record.

- The **Registration - Personal Details** screen displays:



Registration - Personal Details

Surname: WADE

Forename1: ROSEMARY

Forename2: JEAN

Other Forenames:

Date of Birth: 12/03/1956

Sex: Female

Registration status: Applied

TP: Leeds

Applied date: 14/01/2020

Registered GP: Earth, Dr Mel

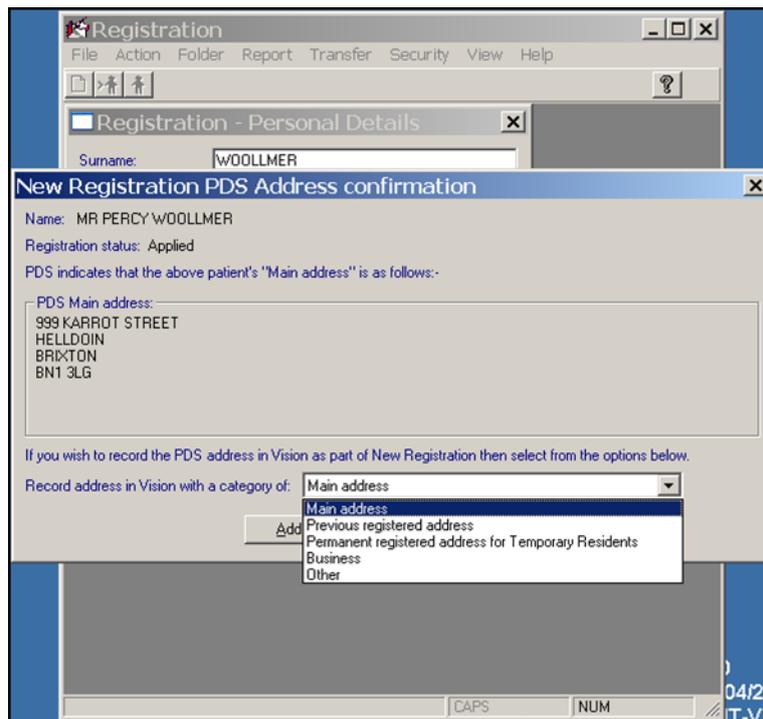
NHS No.: 423 455 4324

CHI Number:

OK Cancel Help

- Check the details and then select **OK**.

8. The **New Registration PDS Address confirmation** screen displays:



9. Select the most appropriate address category for the address displaying and select **Add**. If you select:
- **Main address**, the address saves to **Main address**.
 - **Previous registered address**, you must add a **Main address**.
 - **Permanent Registered Address for Temporary Resident**, you must add the temporary address to the **Main address** section.
 - **Business** or **Other**, you must add a **Main address**.
10. Now complete the following tabs selecting **Next** once you are finished with each one:
- **Address** – See [Address Tab](#) on page 8 for full details.
 - **Registration** - See [Registration Tab](#) on page 10 for full details.
 - **Notes** - See [Notes Tab](#) on page 12 for full details.
 - **Other** - See [Other Tab](#) on page 13 for full details.
 - **Ids** - See [Ids Tab](#) on page 17 for full details.
 - **Family** - See [Family Tab](#) on page 19 for full details.
 - **Consent** - See [Consent Tab](#) on page 20 for full details.
 - **Online Services** - See [Online Services Tab](#) on page 21 for full details.
 - **Preferences** -See [Preferences Tab](#) on page 23 for full details.

11. Check the **Incomplete Details** and **Incomplete RegLinks** indicators at the top of the screen, if:
 - **Incomplete Details** has a tick, you have missed out some optional information.
 - **Incomplete RegLinks** has a tick, you have not completed enough information for **Registration Links**, select **Action - Acceptance** and look for missing mandatory information:

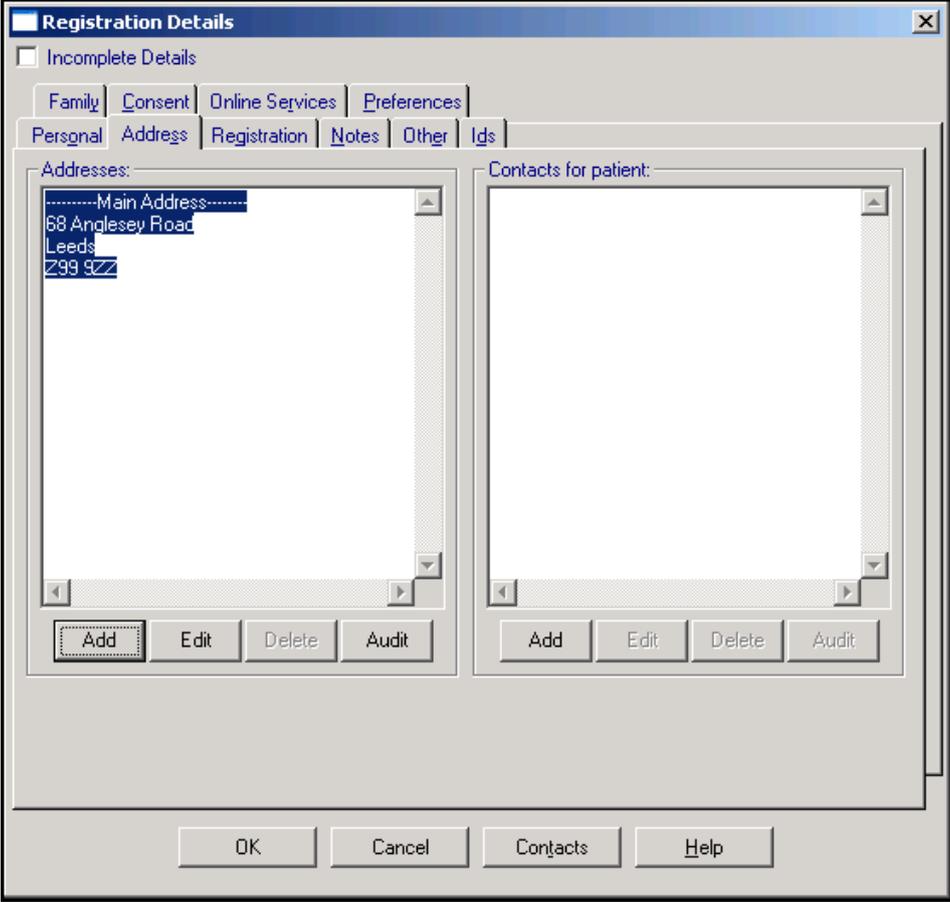


12. Select **OK** to save.
13. If the patient has incomplete details, a warning displays, select:
 - **Yes** to continue, or
 - **No** to return to the registration screen and complete any missing information.
14. Providing you clear the **Incomplete RegLinks** tick before selecting **OK**, the patient's Registration record is frozen and you cannot update their **Registration** details until they are accepted via the **Registration Links** process.

 **Training Tip** - To redisplay the **Registration - Personal Details** initial screen, select **Action - Acceptance** or **Action Re-registration**. You can also return to it once at the **Medical Card** selection type screen, by selecting **Previous**.



Address Tab



The **Address** tab enables you to record a patient's current, previous and where appropriate permanent addresses. You can also record contact information, for example, phone numbers and email addresses.

To add an address:

- Under **Addresses**, select **Add**, complete as required, do not forget to select the type of address you are adding and then select **OK** to save.

 **Note** - For **Temporary Residents** their permanent home address should be added as a second address. Their **Main Address** for your purposes, is the address they are staying at while near the practice.

To edit an address:

- Under **Addresses**, select **Edit**, update as required and select **OK** to save.

To add a contact number:

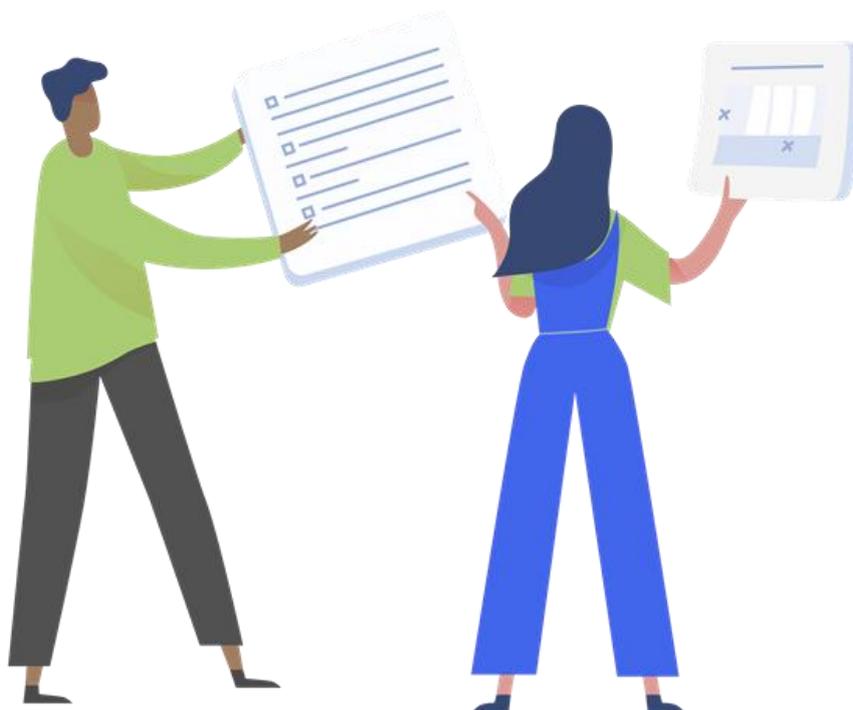
- Under **Contacts for patient**, select **Add**, complete as required, do not forget to select the type of contact you are adding and then select **OK** to save.

 **Note - Telephone - home** indicates a land line and is linked to an address, a **Mobile phone** is linked to a patient.

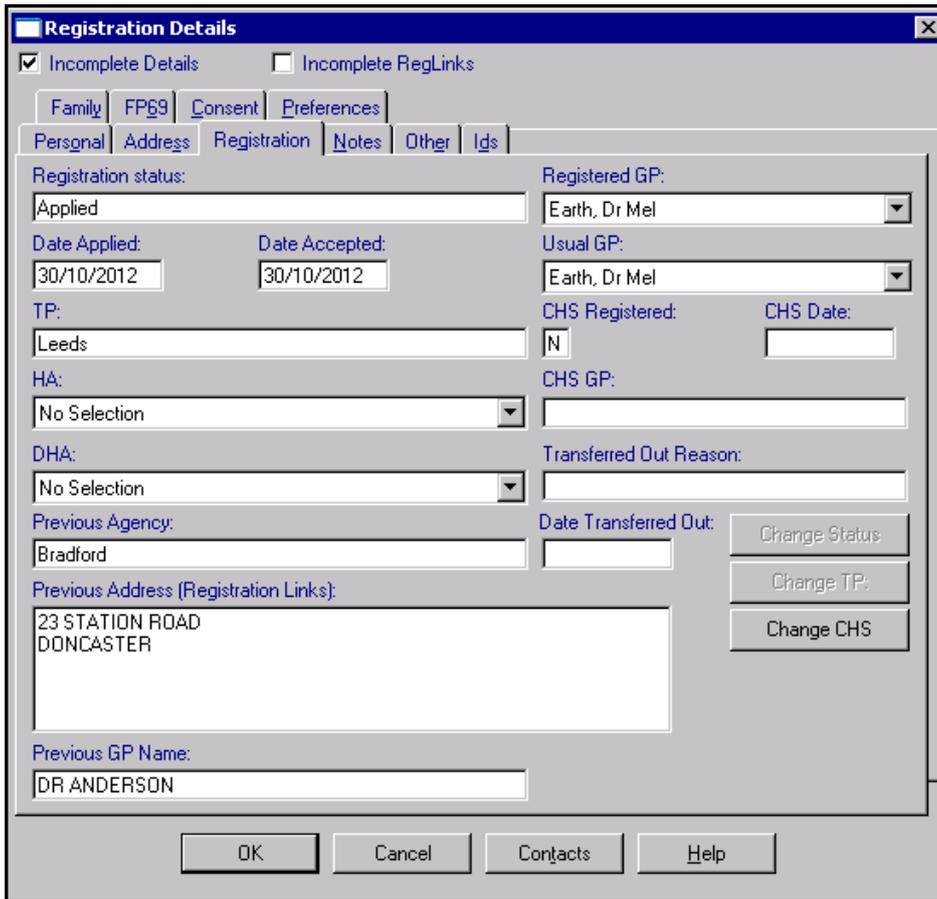
To edit a contact number:

- Under **Contacts for patient**, select **Edit**, update as required and select **OK** to save.

If this is a new patient, select **Next**.



Registration Tab



Most of the **Registration** tab is completed automatically from the registration process.

The **Registration** tab displays:

- **Registration status** - Usually selected in the initial stages of adding a new patient, see [Registration Status](#) for details.
 - The registration status automatically changes from **Applied** to **Permanent** when an **Approval** transaction is received.
- **Registered GP** - The **Registered GP** is selected as part of the registration process.
- **Change Status** – No longer used.
- **Date Applied** - This is the date automatically entered by the system when you add a new patient.
- **Date Accepted** - The **Date Accepted** or **Acceptance Date** is the date that your TP approve the new patient.

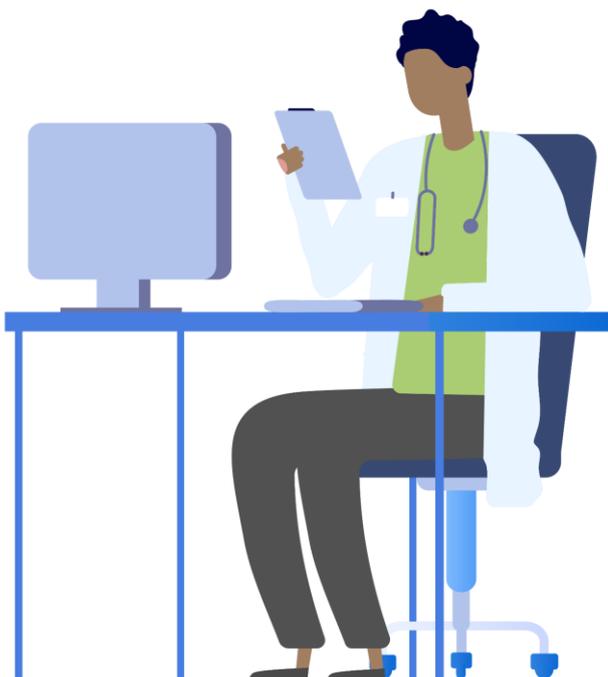
 **Note** - If you change the patient's GP to another partner (Internal Transfer), you are asked if you want to update the **Applied** and **Accepted** dates.

- **TP** and **HA/HB/CSA** - This is usually entered in the initial stages of adding a new patient.
- **Previous Address** - Previous address recorded.
- **Previous Agency** - This entry is optional but is usually entered in the initial stages of adding a permanent patient.
- **Usual GP** - The **Usual GP** is the doctor the patient usually sees and can be different from the **Registered GP**.

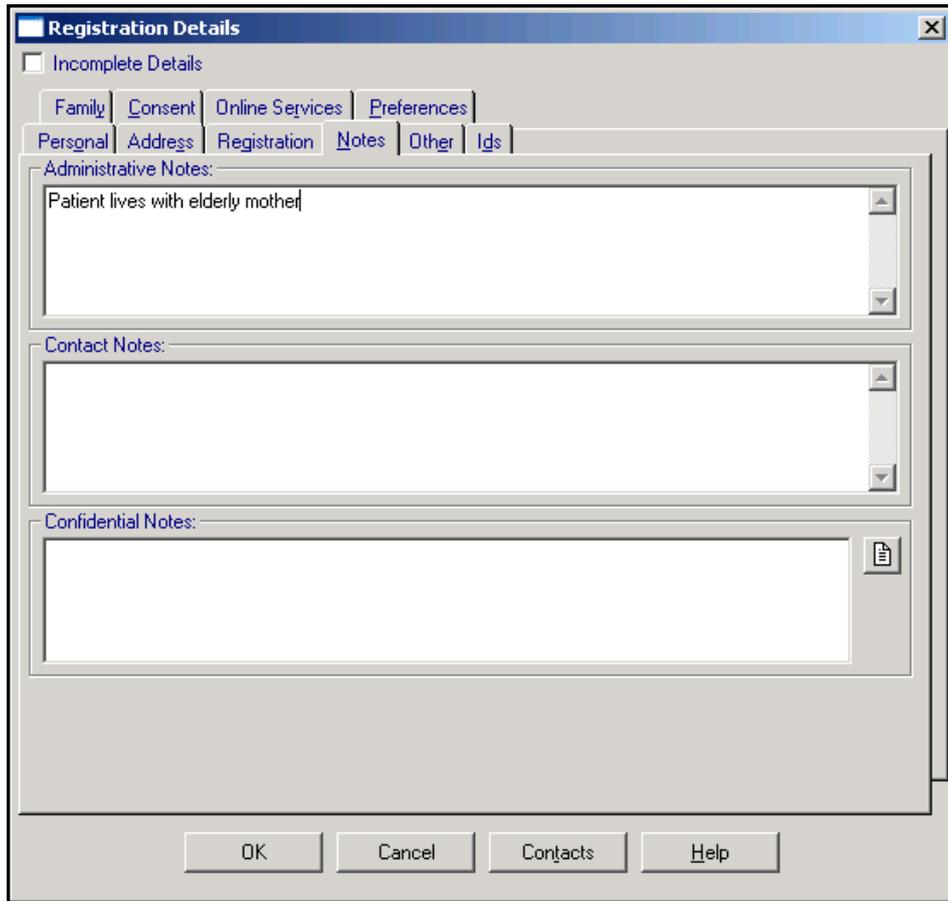
 **Important** - If a patient is registered to a Pooled GP list, the **Usual GP** must be set.

- **Previous GP** - Previous Registered GP.

If this is a new patient, select **Next**.



Notes Tab



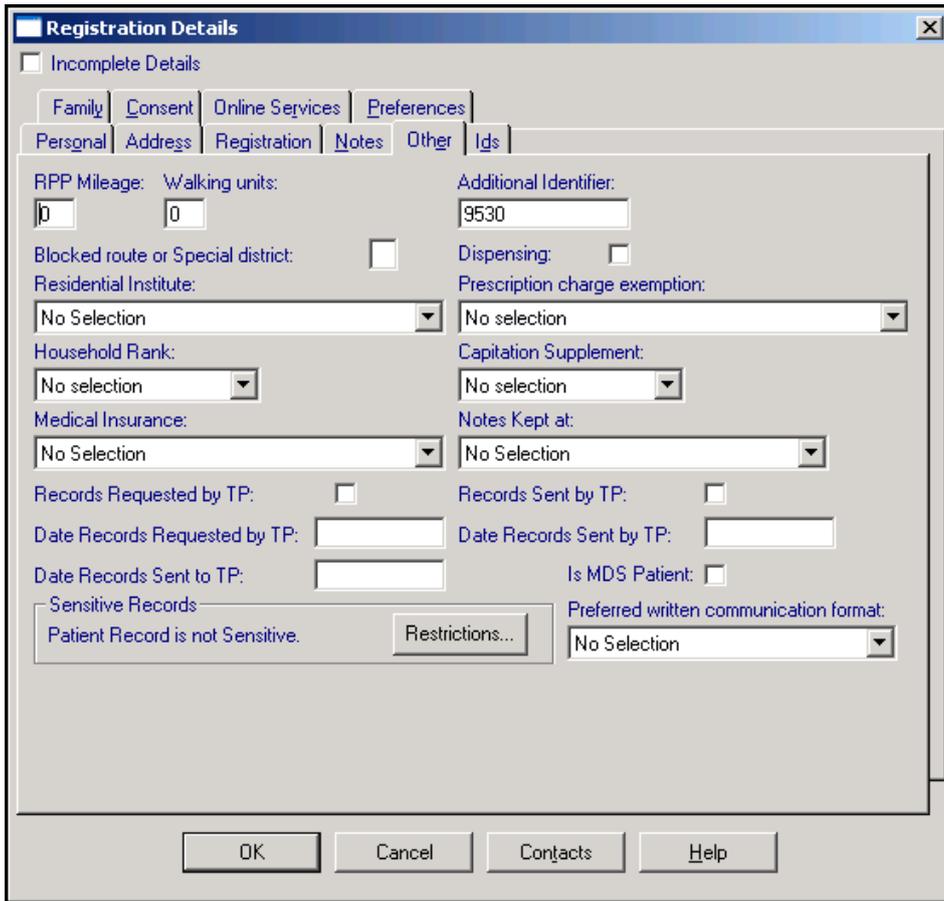
If this is not a new patient, select the **Notes** tab to display.

On this screen, you can enter Administrative Notes, Contact Notes (how to contact the patient) and Confidential Notes:

- To enter **Administrative** or **Contact Notes**, select the required section and type in free text.
- To enter **Confidential Notes**, select **Notes** , and then enter any text required. **Notes**  displays with a red tick to indicate there is an entry.

If this is a new patient, select **Next**.

Other Tab



From within the **Other** tab, you can set:

Rural Mileage

Your TP must approve rural practice payments before any of the following are claimed:

- **RPP Mileage** - Enter the distance in miles, between 3 and 50, of the household from the surgery, if applicable.
- **Walking units** - Enter a number of units between 3 and 99, but divisible by 3. Walking units are credited where the GP has to leave an ordinary car and walk to the patient's residence under normal winter conditions.
- **Blocked or special district** - For the rural practice payment, enter either B for Blocked route payment, for example, liable to flooding, or S for Special District payment, where the patient's address has been designated a Special District, for example, a mountainous district.

 **Note - Footpath and Water Miles** do not display on a patient's **Registration – Other** screen unless switched on.

Additional Identifier

The **Additional Identifier** can be:

- Used for selecting a patient.
- Displayed within Appointments on the Book and Reception views and the Appointment list summary report.
- Selected from **Report Output** to added to a **Standard** and **Summary Report**.
- Displayed on the therapy repeat re-order form.
- Selected as a merge field when setting up a Word template .

Additional identifiers are either:

- **Patient Numbers** - For patients whose data is converted from a non-Cegedim Healthcare Solutions system, the patient numbers used in those systems are added as **Additional Identifiers** during the data conversion process.



Important - The numbering does not continue once conversion is complete. If you want to continue this numbering, you need to add them manually as you add patients.

- **Practice-defined** - You can enter an identifier here if required.

For practices involved in the Data Collection scheme - CPRD use the Vision and Additional identifier, preceded by a # sign. The Additional Identifier number for these practices should never be updated as it provides unique identification of that patient.

For practices not involved in data collection - Up to ten alpha-numeric characters can be entered in Additional Identifier. You are warned if you try and use a number assigned to another patient, but you can override this if you require.

Residential Institute or Institutions

Residential Institutes cover nursing homes, schools and other institutions. Their one or two-letter codes are issued by your local TP.

- Entry of codes for **Residential Institutes** in England and Wales is advised for **Registration Links**, any amendment generates an **Amendment** transaction.



Training Tip - To be available for selection, each **Residential Institute** must be entered in **Control - Panel - File Maintenance - Organisation** under **Residential Institutes**. Enter the one or two-letter code in **RI** code in **Identifier Type** on **Organisation - Identifiers**.

Dispensing

If your practice is an approved dispensing practice, and the patient lives more than the designated distance from the pharmacy, enter:

- **Y** to indicate they are a dispensing patient.
- **N** or leave blank, if not a dispensing patient.

For a dispensing patient, **Dispensed** is automatically ticked on **Therapy - Add**.

When you print a dispensing patient's prescription, **Drug Labels** is ticked automatically and labels are printed at the same time.

Prescription Charge Exemption

Select from the available list to mark a patient as exempt from prescription charges. Those under 16 and over 60 are automatically exempt, but any exceptions should be recorded for dispensing patients.

Household Rank

You can select to rank patients within the same house between 1 and 9, making your own classification of ranking.

Capitation Supplement

This refers to the Deprivation Status (Jarman Index) relevant to the patient's residential area if deprived (often inner city). It is usually classified as (No selection), Low, Medium, High, Not Applicable. Select if required.

Medical Insurance

You can enter whether the patient is part of a private medical insurance scheme. Each insurance company for selection here must first be entered in **Control Panel - File Maintenance - Organisation** under **Insurance organisations for patients**. Select if required.

Notes Kept at

If your practice has more than one location, select which branch the patient is usually seen at.

Records Requested by TP and Records Sent by TP

These are the two medical record flags which record that records have been requested or sent.

Is MDS Patient

Tick the **Is MDS Patient** to mark the patient as requiring dispensing labels for a Monitored Dosage System (MDS).

Sensitive Records

You can restrict staff access to a patient's clinical record by marking it as a

Sensitive Record. Select **Restrictions** , the **Sensitive Patient Restrictions** screen displays.



Note - All staff can view which staff can open the patient record.

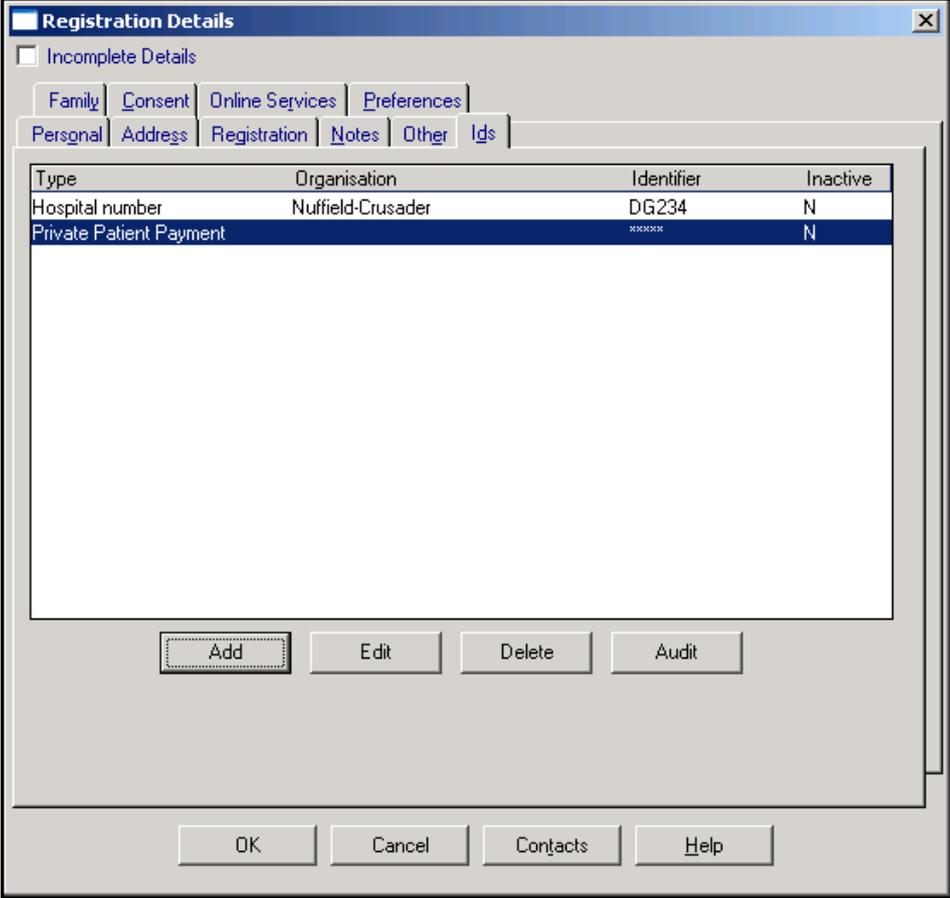
Preferred Written Communication Format

Select from the available options if required.

If this is a new patient, select **Next**.



Ids Tab



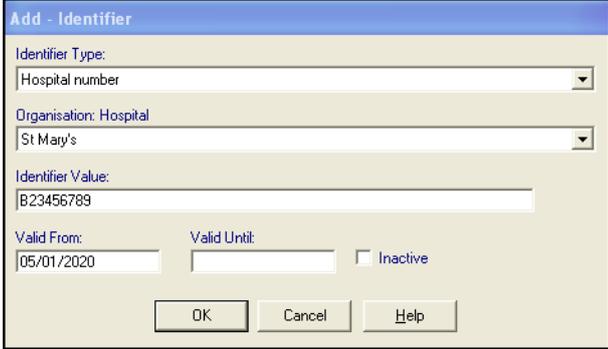
Type	Organisation	Identifier	Inactive
Hospital number	Nuffield-Crusader	DG234	N
Private Patient Payment		*****	N

You can add any reference numbers associated with a patient in the **Ids** screen, for example, a hospital number, for use in a referral letter or a credit card number for private patients.

 **Note** - Most identifiers link to an organisation such as a hospital, which must first be set up in **Control Panel - File Maintenance - Organisation**.

To add an Identifier:

1. Select **Add**.
2. The **Add - Identifier** screen displays:

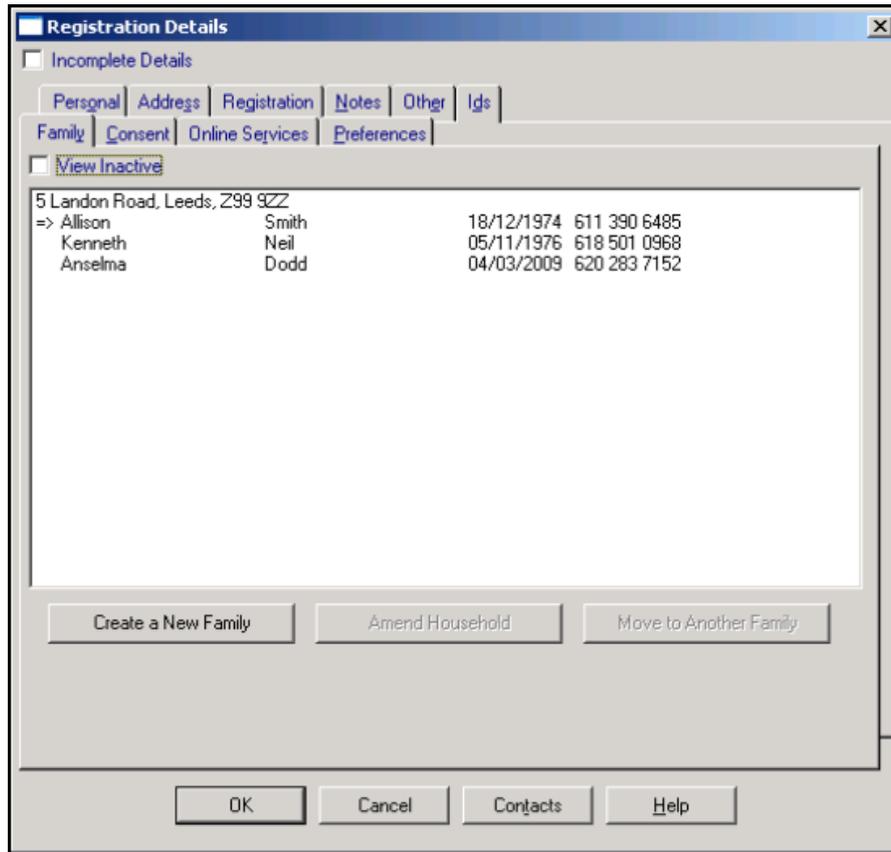


3. Complete as appropriate:
 - **Identifier Type** - Select the type of identifier you are recording.
 - **Organisation** - Select the relevant organisation, this must already exist in **Vision 3**.
 - **Identifier Value** - Enter the actual reference number or code, for example, the hospital number. For a credit card number, any alpha characters entered must be in uppercase. For switch cards, also enter the Issue number alongside the credit card number.
 - **Valid dates** - Optionally, enter a range of dates that the reference is valid. For credit cards, entering a Valid From date is optional and can either be left blank or entered. The date format should be dd/mm/yy and not mm/yy. The expiry date of a credit card **MUST** be entered in Valid Until. Here the date should be dd/mm/yy for example, 31/05/23.
 - **Inactive** - You cannot delete an identifier, but you can make it inactive.
4. Select **OK** to save.

 **Note** - Credit card numbers are shown as asterisks on the front screen. Only by highlighting the credit card line and selecting **Edit** can you see the actual numbers.

If this is a new patient, select **Next**.

Family Tab



The **Family** tab displays active members of the same family or household with identical address lines. From this screen you can select:

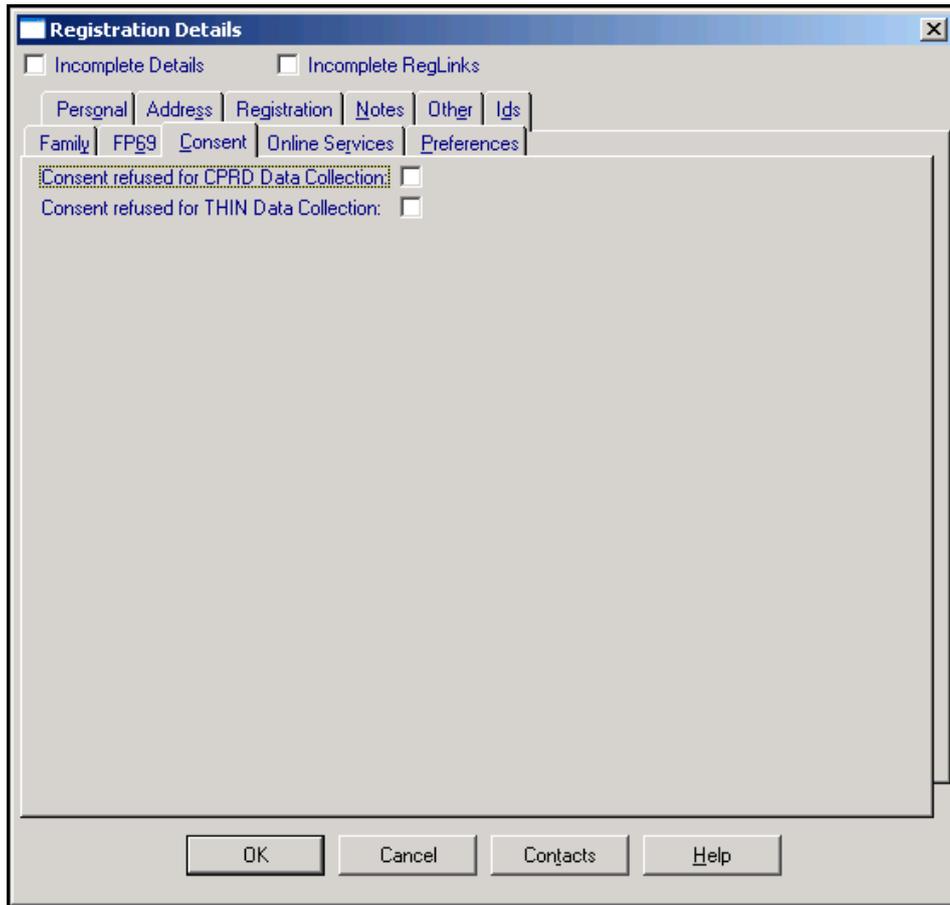
- **Create a New Family** - To move a patient from the existing household to a new household or address.
- **Amend Household** - To make changes which apply to all members of the household, for example, address, land line, rural mileage, dispensing. Make the changes on the selected patient, select **Family** and select **Amend Household** to update the whole household.
- **Move to Another Family** - Select to move the selected patient from the existing household to another family on the practice list.
- **Select a family members registration record** - Double click on a family member to view their registration record.

 **Note** - This is not possible if you are registering a new patient.

 **Note** - If any of these options are greyed out, it indicates the selected patient is **Applied** and therefore frozen.

If this is a new patient, select **Next**.

Consent Tab



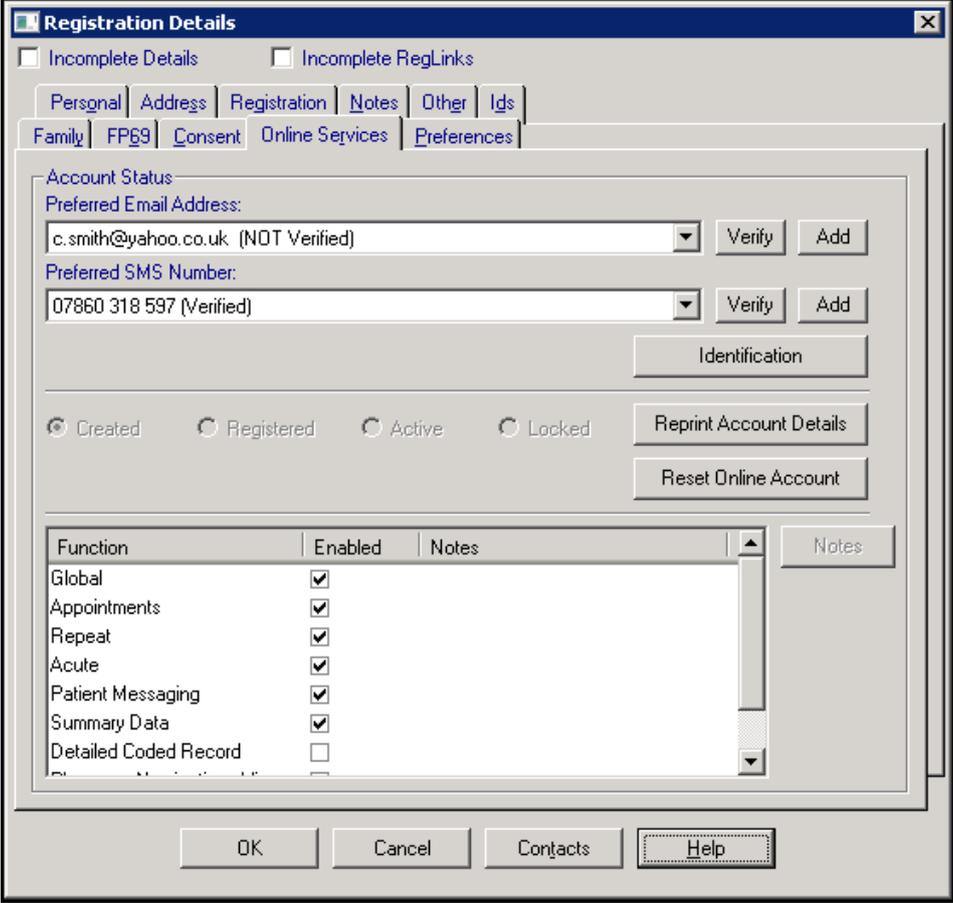
The **Consent** tab enables you to record a patient's consent for various data sharing options:

Consent defaults to assumed for the following data sharing options, tick any to record dissent:

- **CPRD**
- **THIN**

If this is a new patient, select **Next**.

Online Services Tab

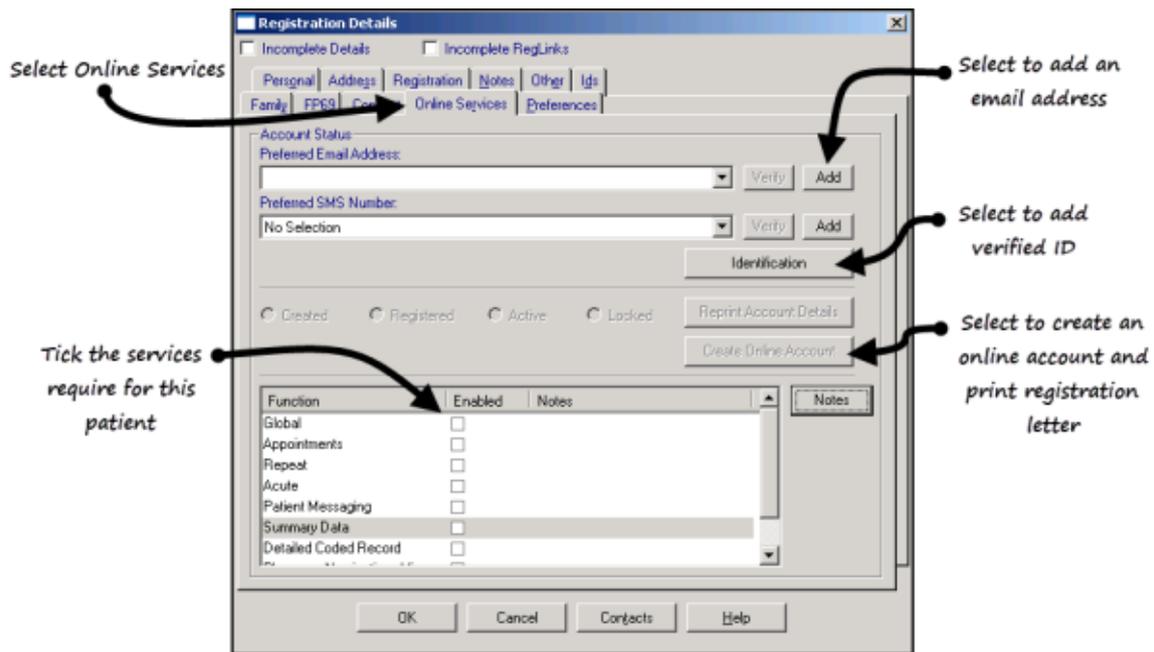


Function	Enabled	Notes
Global	<input checked="" type="checkbox"/>	
Appointments	<input checked="" type="checkbox"/>	
Repeat	<input checked="" type="checkbox"/>	
Acute	<input checked="" type="checkbox"/>	
Patient Messaging	<input checked="" type="checkbox"/>	
Summary Data	<input checked="" type="checkbox"/>	
Detailed Coded Record	<input type="checkbox"/>	

The **Online Services** tab enables you to create an online services account for a patient. To create an online account for a patient:



1. From **Registration**, select the patient required.
2. Select the **Online Services** tab.



3. Complete the following:

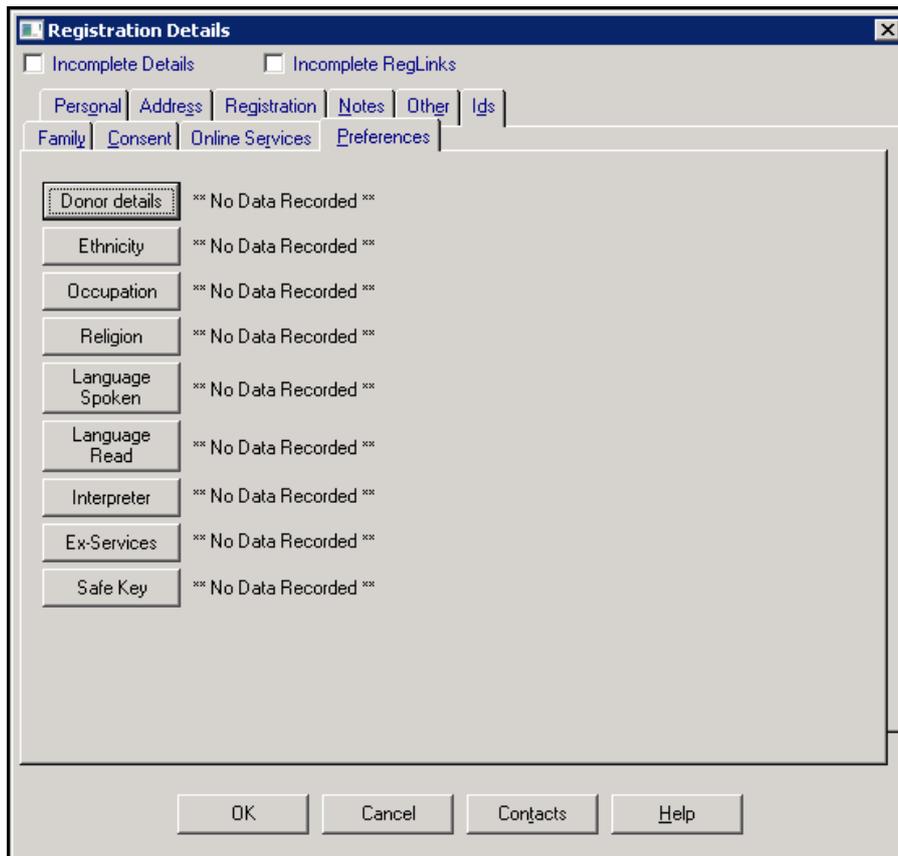
- Preferred Email
- Preferred SMS Number
- Add Patient Identity Verification Details
- Select Online Services

4. Select **Create Online Account**.

 See [Registering Patients for Online Services](#) , in our dedicated Patient Online Services Help Centre for full set up details.

If this is a new patient, select **Next**.

Preferences Tab



The screenshot shows a window titled "Registration Details" with a "Preferences" tab selected. At the top, there are checkboxes for "Incomplete Details" and "Incomplete RegLinks". Below these are several tabs: "Personal", "Address", "Registration", "Notes", "Other", "Ids", "Family", "Consent", "Online Services", and "Preferences". The "Preferences" tab is active and contains a list of fields, each with a button and a status message: "Donor details", "Ethnicity", "Occupation", "Religion", "Language Spoken", "Language Read", "Interpreter", "Ex-Services", and "Safe Key". All status messages are "** No Data Recorded **". At the bottom of the window are buttons for "OK", "Cancel", "Contacts", and "Help".

The following information can be recorded at any time, but you may consider making it part of your registration process:

- **Donor Details.**
- **Ethnicity.**
- **Occupation.**
- **Religion.**
- **Language Spoken.**
- **Language Read.**
- **Interpreter.**
- **Ex-Services.**
- **Safe Key.**

Once recorded the latest entry displays in **Registration Details - Preferences**, and an entry is added to the patient's clinical record with a consultation type of **Administration** and the appropriate clinical term.



Training Tip - These entries can only be edited or deleted from the patient's clinical record.