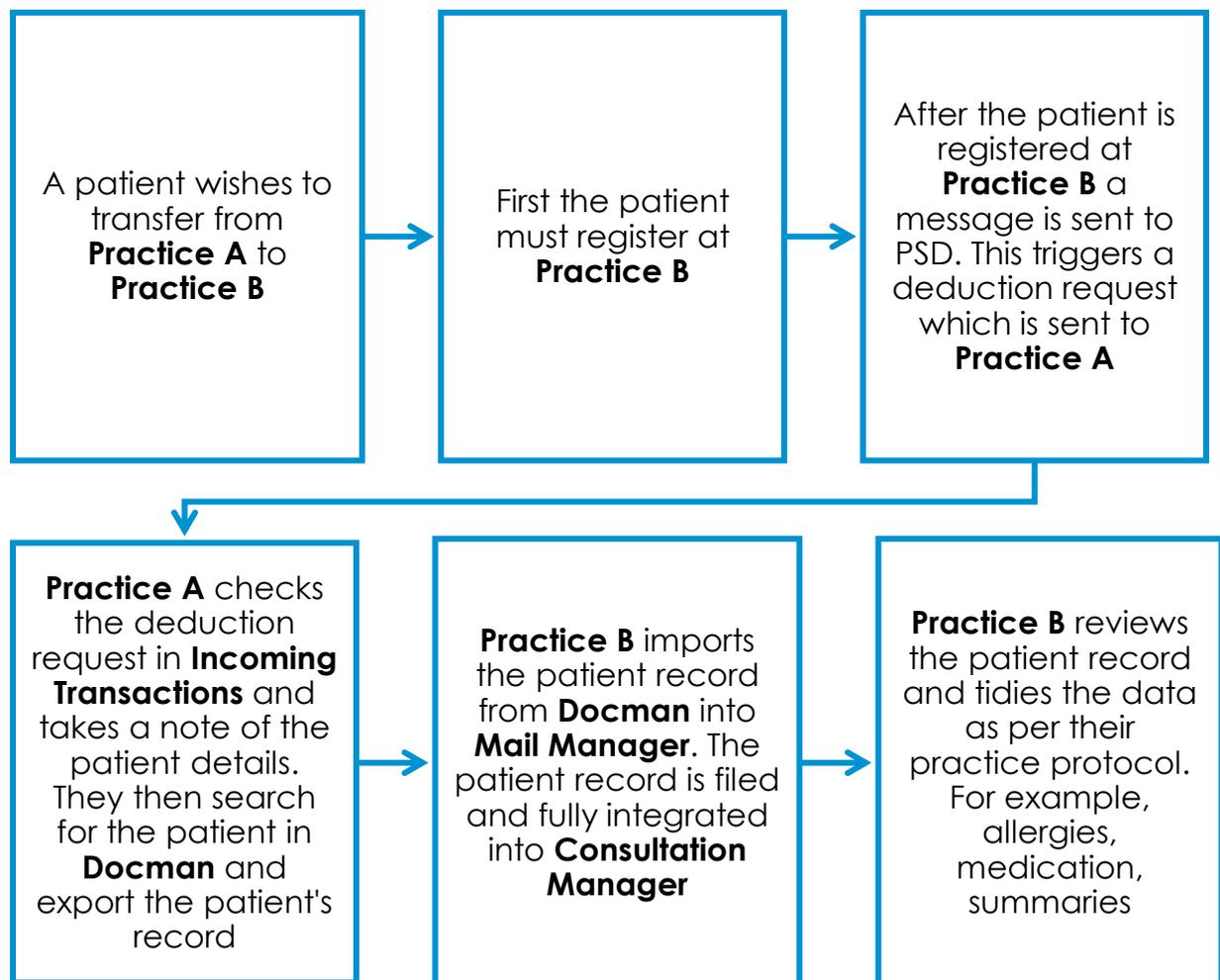


## GP2GP Scotland Quick Reference – Registering and De-Registering Patients

An essential part of GP2GP is to correctly identify and register new patients with **Practitioner Services Division (PSD)**. Patient deductions also need to be handled as quickly as possible. This guide explains the different options available when de-registering and registering GP2GP patients.

### Overview of GP2GP Registration and De-Registration Processes



## GP2GP Clinical Record Restrictions

There are certain circumstances where a full GP2GP transfer cannot take place. Below are examples:

### Importing Restrictions for Returning/Re-registered patients

Where a patient returns to your practice and is re-registered or has been previously registered with a different status, for example, referred or a temporary resident, the GP2GP clinical record cannot be filed into the patient record. This is because any existing clinical data at the point of the new registration will have a system date before the current Applied date.

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 **Note** – A GP2GP message still displays in **Mail Manger** with a status of **Withdrawn** but the patient record cannot be filed and integrated into **Consultation Manager**. This means you have to manually summarise the patient records.

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### File Size Export Restriction

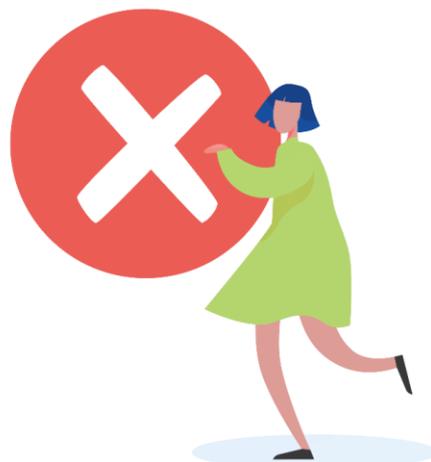
There is a limit on the GP2GP clinical record (not the Docman record). If the clinical record exceeds the 5 Mb limit an error message displays during the Docman export process. See [Large Files](#) page 4.

### Patients without a CHI

A GP2GP transfer is not received for patients where there is no demographic match on CHI, for example, new babies and patients previously registered outside Scotland.

### Unfiled Messages

Any test or screening results that are unfiled in the patient record, within the last 12 months stop a GP2GP transfer. See [Unfiled Messages](#) page 4.



## De-Registering a Patient

This section explains the de-registration process for a GP2GP record. Below describes the changes:

### Docman Export

It is now from **Docman** where you initiate the GP2GP de-registration process. This process automatically deducts the patient and transfers their electronic record. See Docman Export on page 5.

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 **Note** – All patient de-registrations should be processed via Docman export, this is regardless of whether the next practice the patient is registering with is GP2GP enabled.

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### Registration Links

Patient deductions sent by PSD are still listed in **Registration Links**



under **Incoming Transactions** and are used to identify the patients who have left your practice and registered with a new practice. However, you do not process the deduction in **Registration Links** as this process is now part of the **Docman Export** function. See Docman Export on page 5.

### Patient Summary

You are no longer required to print a **Patient Summary** and export it to **Docman**, this is done automatically.

### Read term Patient De-Registered

The Read term **92...00 – Patient de-registered** is added to the patient record when the patient record is exported.

### Key Information Summary/Palliative Care Read term

Patients with a Key Information Summary (KIS) or Palliative Care Summary (PCS) automatically have the **Read term 9Ee10 – Transfer summary report** recorded in their journal when the record is exported.

### CMS (Chronic Medication Service)

CMS Medication is automatically inactivated, and a cancellation message is sent to their pharmacy.

## Unfiled Messages

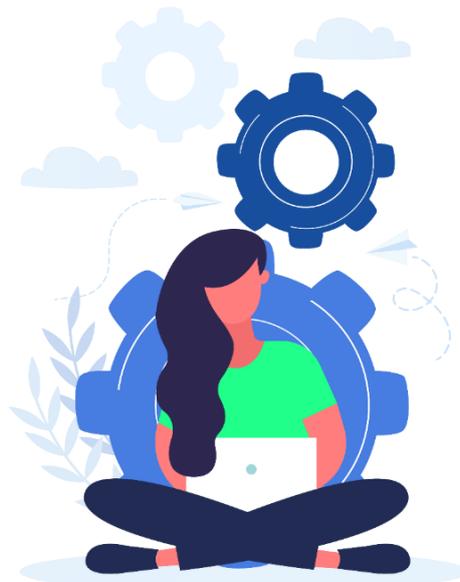
Any tests or screening results, for example, SCCRS, SCI DC that are unfiled in **Mail Manager** and are only available in **Mail for Patient** within **Consultation Manager** must be filed if they have been received in the last 12 months. To resolve this:



1. From **Consultation Manager** , select the patient.
2. Select **Mail for Patient** .
3. Select **Unfiled**  to view unfiled results.
4. View the result and select **File All** .

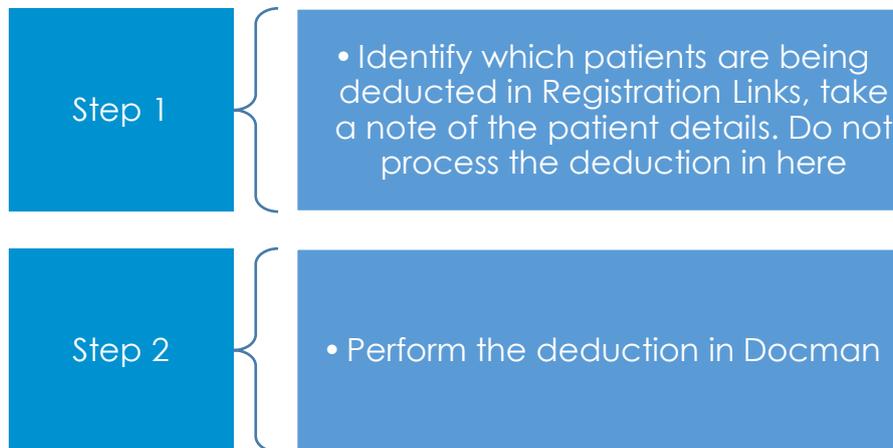
## Large Files

Patient's with a clinical record more than 5 Mb, will not be transferred via GP2GP. This occurs if the patient has large images, for example, attachments/correspondence stored in their record. Any large files or images should be filed into Docman and removed from the patient's record before proceeding with the export. In some cases it may be that no single factor is causing the clinical record to be too large. In these circumstances you may continue to see a Docman error, see What to do if you get a Docman error on page 8.



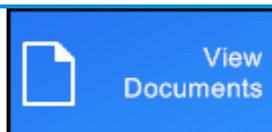
## Docman Export

The following steps are required to process a GP2GP deduction in Docman:



**i Important** – If you deduct the patient in Registration Links a GP2GP will not take place.

1. From **Docman**, select **View Documents**



2. From the **Selection List**, select **Patient**

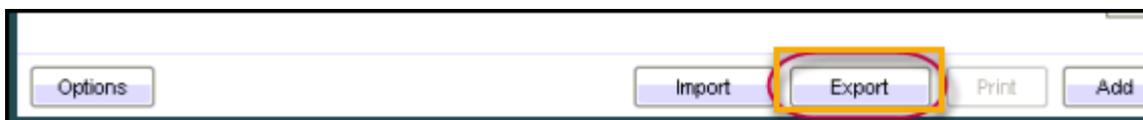


3. Search for the patient using **CHI** or **Date of Birth** (for more accurate results):

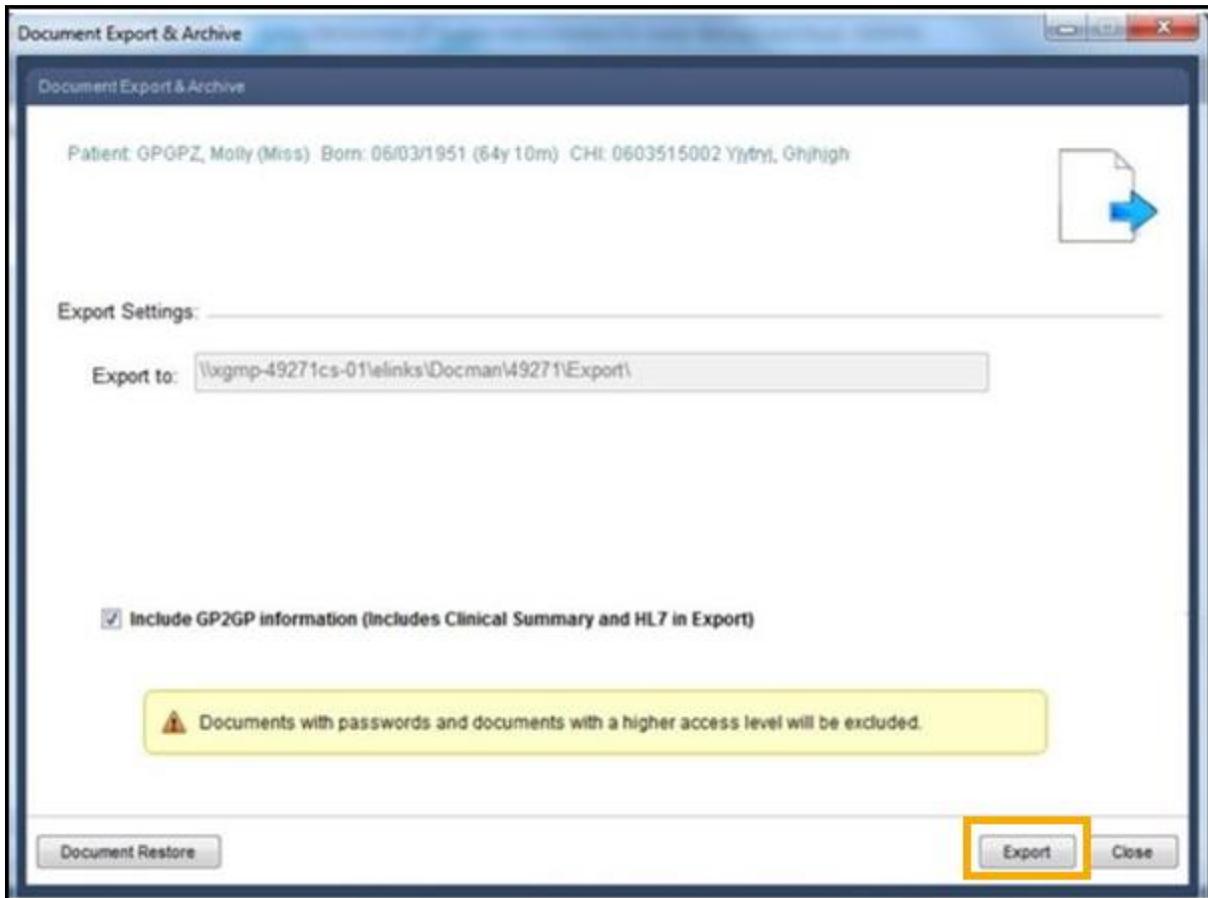


The screenshot shows a 'Patient Search' window with a search bar, a dropdown menu set to 'All searchable fields', and a 'Search' button. Below the search bar is a table with columns: Ref, Title, Forename, Surname, DOB, and House.

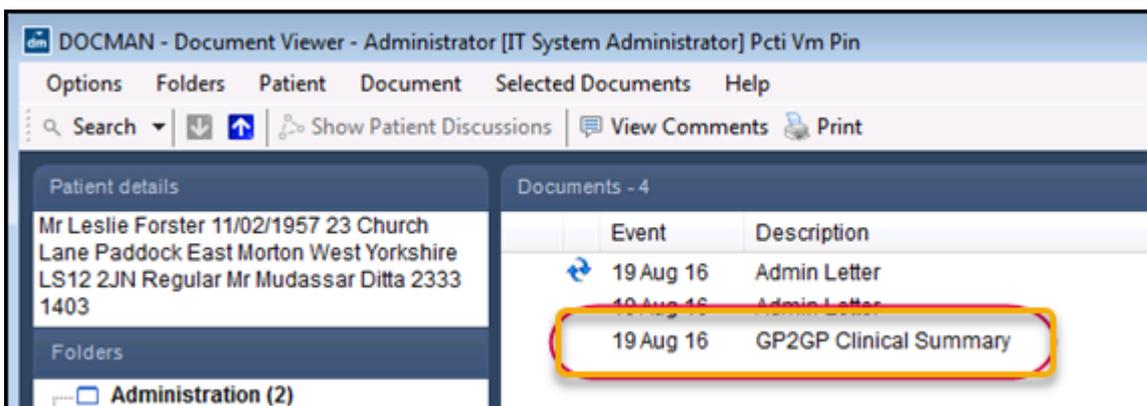
4. Highlight the patient you want to deduct and select **Export**:



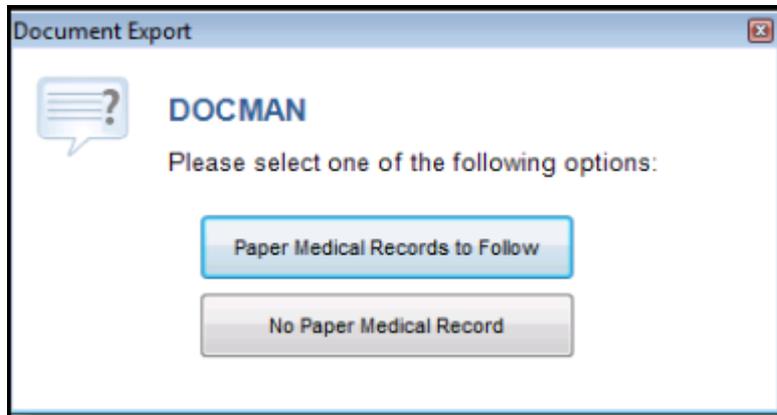
5. The **Document Archive & Export** screen displays:



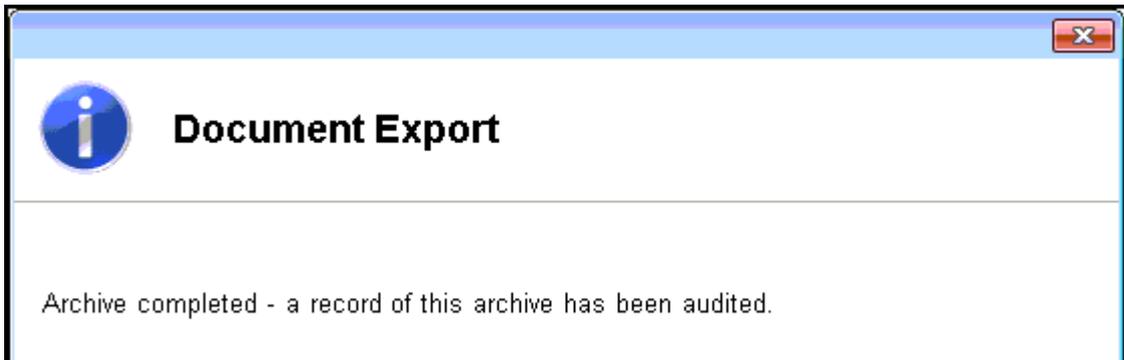
6. To begin the GP2GP export, select **Export** .
7. A copy of all the data held in **Vision 3** for the selected patient is extracted into the patient's record in Docman. The record is exported along with all the patient documents and is added to the eLinks folder and forwarded to the new practice. It is at this point that the export process triggers an accepting incoming deduction message from PSD.
8. A full patient clinical summary is also created and held as a printable document within the patient's documents in Docman, titled **GP2GP Clinical Summary**:



9. You are prompted to confirm if there are any additional paper medical records. This selection does not affect the export itself, but notifies the receiving practice.



10. As part of the export process, the patient's data and document files are collated and you are warned that they are archived. Select **OK**.



11. Finally, a prompt displays detailing the eLinks extract folder where the patient's data and files are saved. Select **OK**.

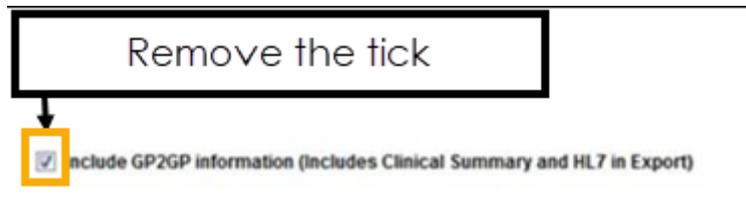


12. The Read term **92...00 – Patient de-registered** is recorded in the patient's record for auditing and search purposes.

13. You still need to enter the date records sent to PSD, by selecting **Registration – Other – Date Records sent to HB**.

## What to do if you get a Docman error

Where a Docman error displays when exporting the patient record, you should continue with the export and remove the tick from the GP2GP option in Docman. Then check the following:



- See if the clinical summary is created in Docman as this is the first part of the export process. Do this by viewing the patient's Docman record and if the summary exists you must deduct the patient the old way (via Registration Links), but you do not need to create a summary via Searches and Reports.
- View Registration Links to see if the patient is still listed in Incoming Transactions. Patients listed in Incoming Transactions have not been successfully exported, and you must process the deduction the old way (via Registration Links) and if a clinical summary has not been created (as above), you must also create a clinical summary as before (using Searches and Reports).



## Registering a New Patient

Before registering a new patient, you should perform the following checks:

- Ensure the registration forms are complete and all information is readable and accurate.
- Check the Patient Identification.
- Check if the patient is a brand new patient or a re-registration.

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 **Reminder** – A GP2GP transfer is not received for patients where there is no demographic match on CHI, for example, new babies and patients previously registered outside Scotland. Also, a GP2GP will not occur for patients who are Temporary Residents and patients who were previously on your system, for example, Referred or Transferred out.

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## Registration Checks



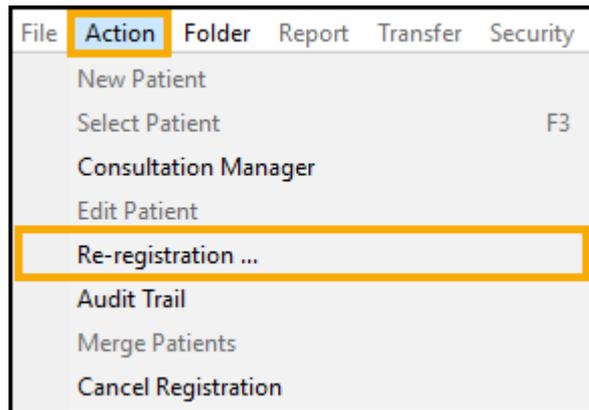
1. From **Registration** , select a patient .
2. Remove the tick from **Active Patients only** .
3. Type the patient's date of birth and change the search criteria to **Date of Birth**.
4. Select **Find**.
5. Check to see if the new patient is listed.
  - For patients who have previously registered with your practice, see Re-Registering a Patient on page 10.
  - For new patients, see Registering a Brand-New Patient on page 11.

## Re-Registering a Patient

For patients who are already on your system select the patient in **Registration**



, select **Action** and choose **Re-Registration**. Register the patient as normal using your practice protocol for re-registrations:




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 **Remember** – Currently no GP2GP transfer is possible when you re-register a patient. The GP2GP message displays in **Mail Manager** with a status of **Withdrawn**. The GP2GP message cannot be filed or integrated into **Consultation Manager**.

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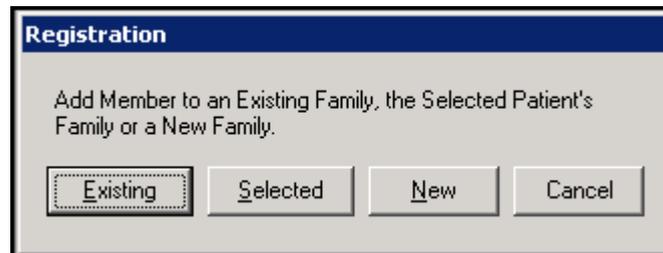
## Registering a Brand-New Patient

If the patient is not registered at your practice, complete as follows:



1. From Registration , select **New Patient**.

2. A prompt displays asking if the patient is to be added to an **Existing** or **New Family**. **Selected** is also an option if you have a patient selected at the top of the screen. Select the appropriate choice:



3. Complete the **Registration – Personal details** screen as required.
4. Complete the **Medical Cards** screen as required.
5. Check the patient's current address and registration details.
6. On completion of the **Registration**, select **OK**.

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 **Note** – Make sure **Incomplete RegLinks**  **Incomplete RegLinks** is unticked as this implies some mandatory registration information is missing and the registration is not sent to PSD, consequently this delays the GP2GP record being received.

7. Once the registration is processed via Partners (Registration Links) with PSD, the GP2GP record is managed by **Docman Imports**.