# Quick Reference Guide to Registration Links

Registrations entered in the Vision Registration module are sent electronically to the Health Board (HB) where they are processed centrally. The Health Board send registration messages back to the practice which contain changes such as deductions, amendments and approval of new patients. This two way exchange of Registration data is processed in Registration Links. This guide explains what you should be checking on a regular basis.

To access Registration Links, go to the Vision front menu, select **Messaging** - **Registration Links**.
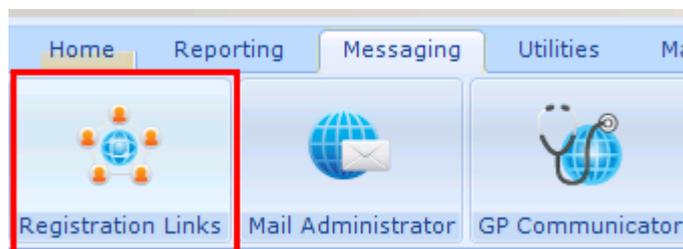

Registration Links

Transaction Management

You must check the incoming and outgoing registration messages on a regular basis. This is done in the Transaction Management screen in Registration Links.

1. In **Registration Links,** click on the first icon Transaction Management or select **Action** and choose **Transaction Management**.

2. The **Transaction Management** screen is displayed.

3. The top three options should be checked on a regular basis:

   - **In-coming Transactions.** See *Dealing with Incoming Transactions* (page 2).

   - **Error File.** See *Dealing with the Error File* (page 6).

- **Unacknowledged Acceptances.** See *Unacknowledged Acceptances (Frozen Patients)* (page 9).
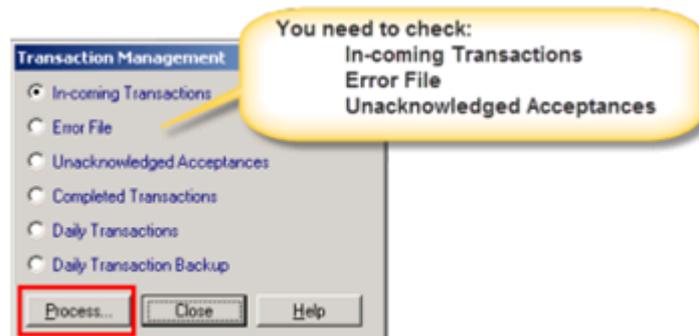

Transaction Management screen

4. Select the one you require and click **Process.**

Dealing with Incoming Transactions

The Incoming Transactions screen shows a summary of the different messages received from the Health Board that require your action. Each Transaction should be dealt with by highlighting it and clicking **Process**. The next section explains how to deal with the following message types:

- **Deduction** - A deduction is received when your patient is being removed from the practice list.

- **Amend In** - An amendment is received when the Health Board update a patient's registration details.

- **Acceptance (Rej)** - An acceptance rejection is received when a patient has been registered with the wrong Health Board.
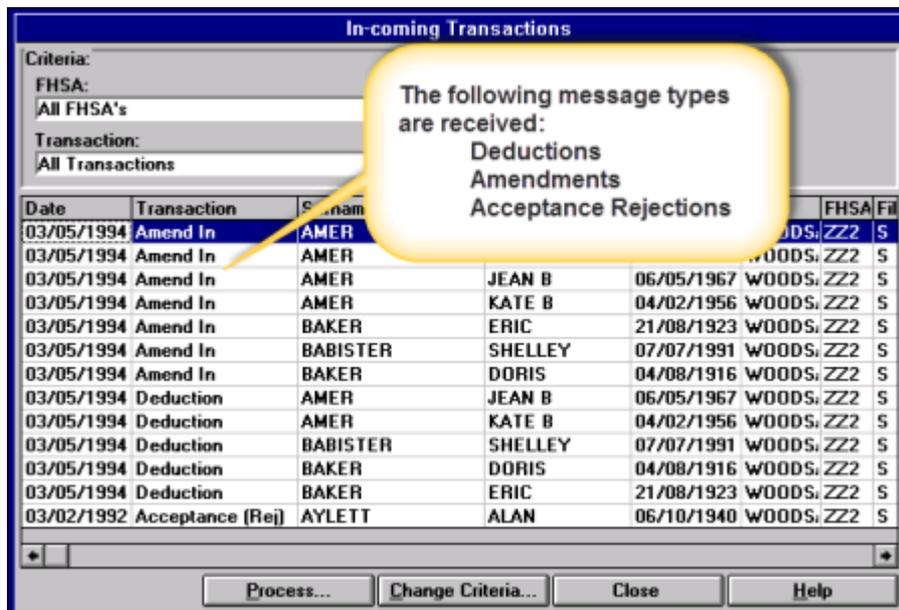
In-coming Transactions

💡 **Training Tip** - You can print any of the incoming Transactions before processing them by selecting **Action** - **Reports** in **Registration Links**, or choosing the Report ✛ icon.

Patient Deductions

Patient deductions sent by the Health Board are listed in Incoming Transactions and can either be accepted or rejected. The following topics tell you how to deal with both scenarios:

Accepting the Deduction

💡 **Training Tip** - Before accepting the deduction you may want to print the deduction list in order to pull the patient's record. You can do this by selecting **Action** and **Reports** in **Registration Links**, or choosing the Report ✛ icon. Change the report type to **Deductions requested by HB** [Deductions requested by HB] and choose **Process**.

Highlight the deduction and click **Process.** At the top of the screen is the reason for the deduction. If you are happy for the patient to be transferred out, click the **Deduct** [Deduct...] button. This will automatically change the patient's registration status to **Transferred Out** with the Reason provided by the Health Board. This is shown in the patient's registration screen on the Registration tab.

When the records are returned to the HB the date that the records are sent back should be recorded in the patient's registration screen. To do this:

1. Select the patient in **Registration.**
2. Click the **Other** tab
3. Add the date returned to HB in the **"Date records sent to TP"** box.
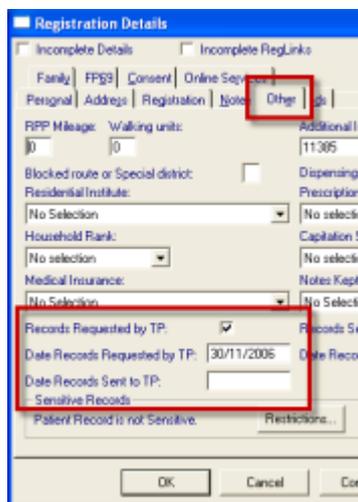

Registration - Other tab

4. Click **OK** to save the changes.

> 💡 **Training Tip** - You now need to export the patient's record using the Export facility in Docman.

Rejecting the Deduction

You can reject the deduction by choosing the Re-accept **Re-accept...** button. You are prompted to enter a reason in the GP Notes box. This should be a brief explanation of why you do not want the patient to be removed from your list. Click **OK** and the rejection message is sent back to the Health Board.
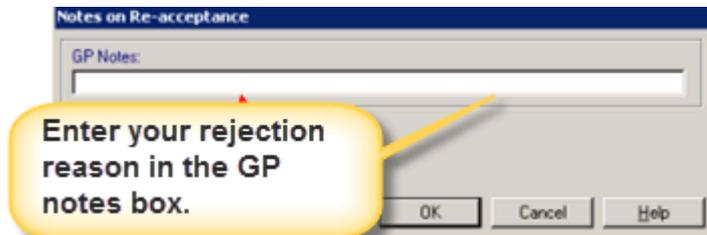

Rejecting a Deduction

Amendments

Amend in transactions are amendments sent from the Health Board and they can either be accepted or rejected. Highlight the amendment and choose **Process**. Below is a summary of how to deal with both scenarios:

Accepting Amendments

Amendments from the Health Board appear on the right hand side of the screen. To approve the amendment click the **Accept** button which will automatically change the details in the patient's registration screen.

> 📄 **Note** - A percentage % sign indicates that the contents of the box are to be removed.
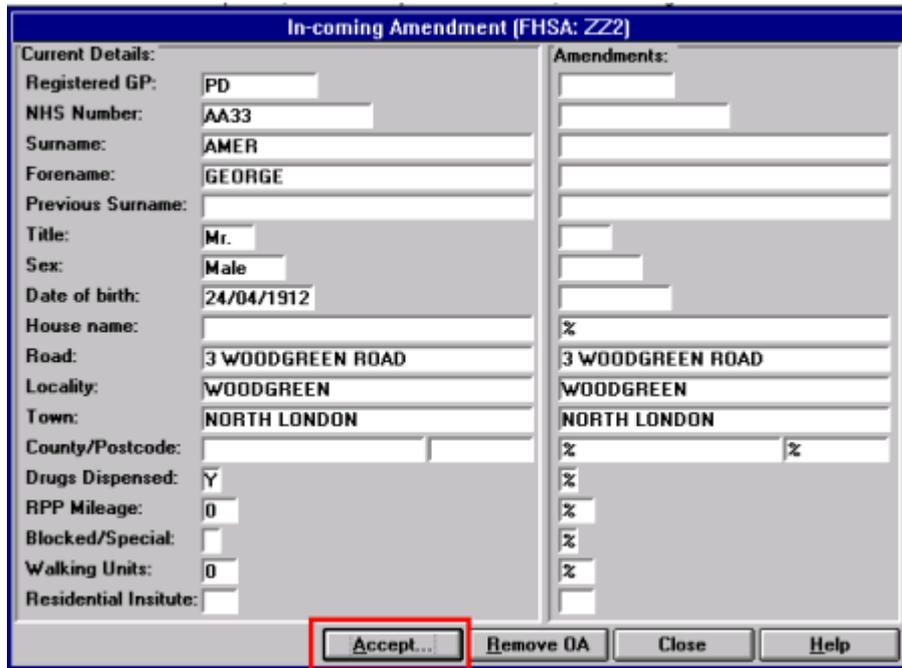
Accepting Amendments

Rejecting Amendments

To reject the amendment click the **Reject** button and enter a reason for the rejection. Alternatively, if a change of address has been sent from the Health Board and the patient is outside the practice area, you can choose **Remove OA** which means you want the patient removed from your list because they are outside your practice boundary.
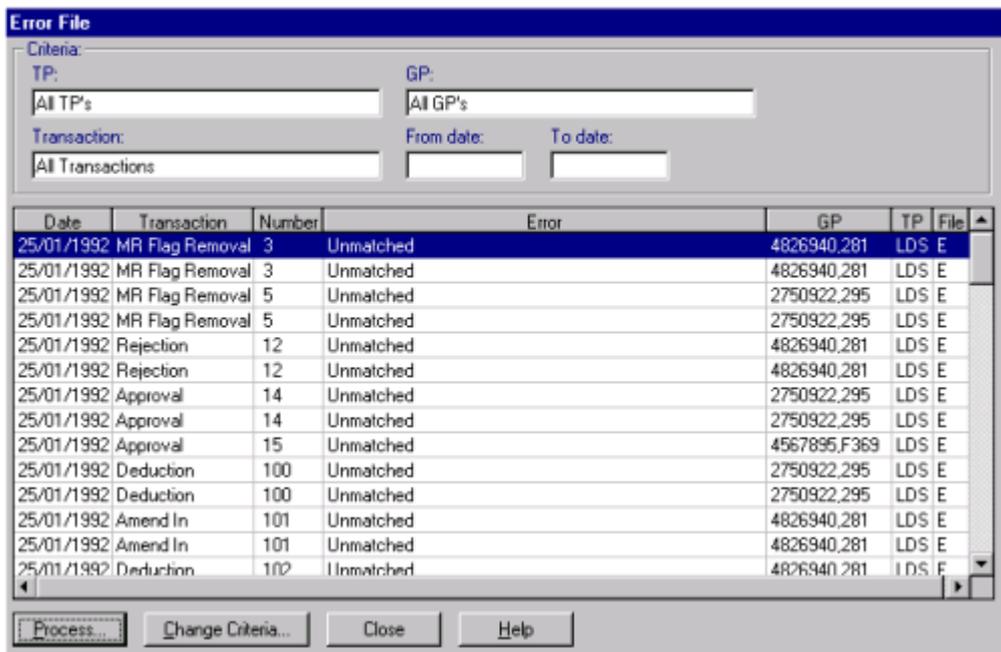
Acceptance Rejection

An acceptance rejection message occurs where an acceptance has been rejected because the patient has been registered with the wrong HB eg cross border practices. The acceptance is rejected by one HB and the patient needs to be re-accepted with the correct HB. To do this click the **Re-accept** button and enter a free text note in GP notes. Click **OK** to complete the transaction.

Dealing with the Error File

Any incoming transactions from the Health Board that cannot be matched with a patient in Vision will be placed in the **Error File** as an **Unmatched Transaction**. The error does not show the patient's name so before dealing with the error you need to identify the patient by searching on their NHS/H+C number or Date of Birth.

> 📄 **Note** - To find the patient's NHS/H+C Number or Date of Birth, highlight the Transaction and click **Process**. If this information is not available you cannot resolve the unmatched transaction and the only action you can take is to delete the error.

Error File

The following section explains the errors and how to deal with them:

> 📄 **Note** - To resolve errors you may need to use the **Security Controlled Functions** in **Registration**, only System Managers have access to these options.

Unmatched - Incoming Approval

If there is an Approval in the Error file it indicates that an acceptance has been sent for a new patient but it could not be matched to the patient. You need find the patient in Registration by searching on the NHS/H+C number and dependent on their registration status do one of the following:

Permanent

If the patient is Permanent it means the patient has already been accepted and is on your practice list. The approval in the error file may be a duplicate so all you need to do is delete it. To do this select **Transaction Manager - Error File** in **Registration Links.** Highlight the error, click **Process** and choose **Delete**.

Applied

If the patient is still Applied it means they are not registered with your practice and you need to security approve the patient.

1. In **Registration**, go to **Security** - **Approve Patient.**
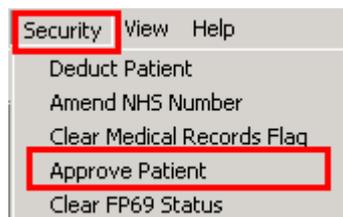
Security Approve Patient

2. Select the patient and the security approved screen is displayed.

3. Enter the patient's NHS/H+C number and click **OK**.

4. You now need to delete the error by selecting **Transaction Manager** - **Error File** in **Registration Links**.

5. Highlight the error, click **Process** and choose **Delete**.

Unmatched - Deduction

Sometimes a deduction is sent that cannot be matched to a patient and will appear in the Error File. Normally deductions are initiated by the Health Board and practices should not deduct patients but in this scenario you can security deduct the patient; otherwise the patient will remain on your list as permanent.

1. In **Registration** from the **Security** menu option, choose **Security Deduct**.

2. Select the patient and enter the date of the deduction and choose a deduction reason eg Other Reason.

3. Click **OK**.

4. You now need to delete the error, select **Transaction Manager** - **Error File** in **Registration Links.**

5. Highlight the error, click **Process** and choose **Delete**.

Error File - Deduction

Unmatched - Amendment

If the Health Board make an amendment to the patient's registration data which cannot be matched to one of your patients it will appear in the Error File. You should check what the amendment is and update the information in the patient's registration screen, then delete the error.

Unmatched - Medical Record Flag

Medical Record flags are notifications (flags) that are sent to and from the Health Board when records are sent and received. When the Health Board send a new patient's paper records a Medical Record Flag sent is set which the practice should remove on receipt of the records. When a patient is deducted a Medical Record Flag Removal is set which should be removed when the Health Board receive the patient's records. If the flags are not matched to the patient they will appear in the Error file.

1. To clear the Medical Record Flag, select **Security** from the menu in **Registration** and select the patient.

2. Choose **Clear Medical Records Flag**.

3. The Registration Security screen is displayed, tick the box "*Confirm you wish to Clear Medical Record Flag*" and click **OK**.
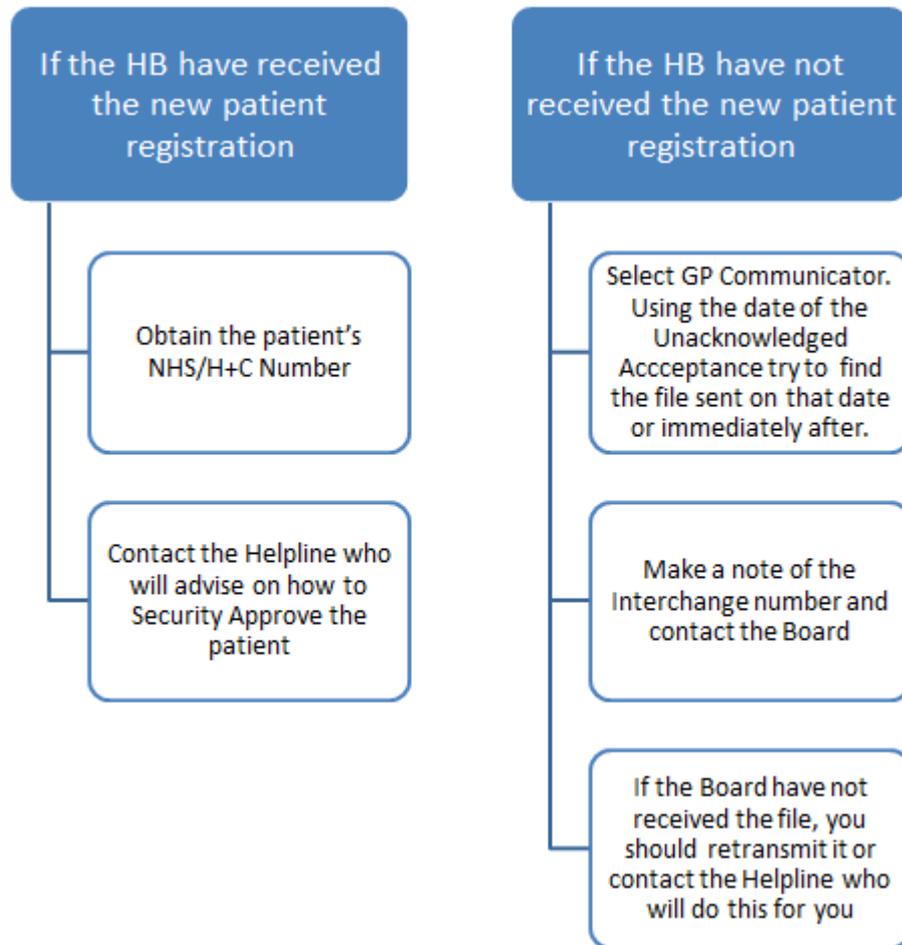
> 💡 **Training Tip** - For more information on what Medical Record Flags are and how to deal with them, please refer to the on-screen help.

Unacknowledged Acceptances (Frozen Patients)

When you add a new patient in Registration, this will generate an Acceptance Transaction. This is sent in the next transmission to the Health Board and the patient's Registration screen becomes "frozen" and they are placed in the **Unacknowledged Acceptances** file. Once an approval is received from the Health Board the patient's name is automatically removed from this file, they have a NHS/H+C number and their registration details are "unfrozen".

You should view your Unacknowledged Acceptances on a regular basis to make sure all new patients have been accepted. For patients who have been registered for more than a week and are still in this file, you should contact the Health Board to see if they have received the registration. Below is a summary of what you need to do:

```
┌─────────────────────────┐        ┌─────────────────────────┐
│  If the HB have received │        │  If the HB have not      │
│     the new patient      │        │  received the new patient│
│      registration        │        │      registration        │
└─────────────────────────┘        └─────────────────────────┘
           │                                   │
  ┌────────────────────┐            ┌────────────────────────┐
  │ Obtain the patient's│            │ Select GP Communicator. │
  │  NHS/H+C Number     │            │ Using the date of the   │
  └────────────────────┘            │ Unacknowledged          │
           │                         │ Accceptance try to find │
  ┌────────────────────┐            │ the file sent on that   │
  │ Contact the Helpline│            │ date or immediately     │
  │ who will advise on  │            │ after.                  │
  │ how to Security     │            └────────────────────────┘
  │ Approve the patient │                       │
  └────────────────────┘            ┌────────────────────────┐
                                     │ Make a note of the      │
                                     │ Interchange number and  │
                                     │ contact the Board       │
                                     └────────────────────────┘
                                                │
                                     ┌────────────────────────┐
                                     │ If the Board have not   │
                                     │ received the file, you  │
                                     │ should retransmit it or │
                                     │ contact the Helpline    │
                                     │ who will do this for you │
                                     └────────────────────────┘
```

Unacknowledged Acceptances - Process

If the Health Board have received the New Patient Registration

1. Obtain the patient's NHS/H+C number from the Health Board and contact the Helpline who will advise on how to Security Approve the patient.

2. Select **Registration** and choose **Security** from the menu followed by **Approve Patient.**

3. Select the patient and the security approved screen is displayed. Enter the patient's NHS/H+C number and click **OK**.

If the Health Board have not received the New Patient Registration

If the Health Board have not received the new patient registration you need to do the following steps:

1. Make a note of the date that the Unacknowledged Acceptance was sent to the Board.

2. In **Messaging**, select **GP Communicator**.

3. Find any files sent on the same date or within a couple of days of the unacknowledged acceptance. Make a note of the **Interchange number** and contact the Board to see if they have received it.

4. If the Board have not received the file, you can right click on the file and choose the option to **Re-Transmit**.

5. If you cannot find the file or if the Board have already received it, contact the Helpline.

On Receipt of the Patient's Record

When the records are received you should record their receipt by updating the Registration screen.

1. Select the patient in **Registration.**

2. Click the **Other** tab.

3. Remove the tick from box **Records Sent by TP** and click **OK**. This sends an acknowledgment back to the Health Board that you have received the patient's paper record.

Records received by HB

Recording a Read code

It is no longer a QOF requirement to summarise the patient's records within 8 weeks, however, we still recommend that you record when the records are received and when they are summarised in the patient's journal by Read coding:

- **Read code #9134 -** Lloyd George record received.
- **Read code #9344** - Notes summary on computer.