

THE RED PRACTICE, WHITEFRIARS SURGERY

NEW PATIENT REGISTRATION

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Responsibility to carry out Procedure	Norma Beck
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Responsibility for Reviewing: Policy	Norma Beck
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Policy Statement / Purpose:

The purpose of this policy of this practice to accept any patient onto our lists that is eligible according to GMS Schedule 2 Regulation 3(2). We reserve the right to close our lists temporarily as and when it becomes apparent that, to accept more patients would compromise the quality of care being delivered to those already registered. We reserve the right to refuse a patient onto our list in accordance with the Practice Refusal Policy.

If someone who is already registered with another Perth City Practice wishes to be registered on our list, they are requested to attend a short interview with the partner of their choice to discuss their needs. If accepted thereafter, the patient will then proceed to undertake our New Patient Registration Procedure.

(a) REGISTRATION OF A NEW PATIENT

1. Select Consultation Manager
2. **CHECK BY DATE OF BIRTH whether patient has been or is already registered with the Practice.**
3. Select Registration from the Home menu on the Vision front menu.
4. Click on 'Select Patient' button (blue person icon).
5. At the Select Patient screen, **make sure that 'Active Patients only' is not selected.**
6. Change the Search Attribute to Date of Birth, then enter the patient's date of birth in the Search Details field, and press Enter.
7. If their name does appear on the list, then they are, or were, registered.
8. If registration has expired, re-register them by answering Yes to This patient is no longer active – do you wish to continue? Then in Registration, select Action – Re-registration and follow the prompts.
9. If the message: 'A patient could not be found' is displayed, click OK to clear the message, and click on Cancel to exit from the Select Patient screen. And follow steps **1** through **6**
10. Click on the icon to add a patient.
11. At the question: New, Selected or Existing?
 - a. • If you select **Existing**, select another member of the same family in the same household.

- b. • If there is no member of the same family to your knowledge, then select **New**.
 - c. • Select **Selected** - if the last patient selected - and at the top of the screen - was a member of the same household – this means you can use the same address lines, and surname, if relevant.
12. At the Registration Personal Details screen, the fields in red are mandatory: Surname, Forename, Date of Birth, Sex, TP (the Health Authority you are linked to), Registered GP and NHS No. These must be completed before the screen can be accepted. If you selected a family member before adding some details such as Surname will already be filled in.
13. Use the mouse or the Tab key to move from field to field.
14. Forename2 and Other Forenames can be left blank if not known.
15. Sex – type M for male or F for female, Press Tab.
16. Registration status – Change to ‘Referred’ if this is a straightforward registration of a permanent NHS patient. Otherwise click on ‘drop down’ box and select appropriately from the picklist, eg ‘Temporary Resident’.
17. TP (HB or CSA) – use the down arrow and select Tayside. Press Tab.
18. Registered GP – Select the GP.
19. NHS No – This field is shown in red. Type the number in without spaces if known. It can be left blank for adults in England/Wales if not known, but is mandatory for new babies if you have a ‘Register of Birth Certificate’.
20. When all details are complete, press Enter or click on the OK button.
21. To add the main address, when you first reach the main Registration – Personal screen, the focus (cursor) is on the Add button beneath the Main Address window, if no main address is present. Just press Enter to go into the Address Add screen.
22. At the Main Address Add screen, either the House Name or Number and Road must be completed:
- a. House Name – can be left blank, but should include any flat number or name of a property if there is one (eg Flat 1A, or Rose Cottage)
 - b. Number and Road – can include the property number and road/street name, eg 21 High Street would have 21 in Number, and High Street in

Road. If House is blank, Road must be entered, otherwise, Road is optional. If you type the first two or three letters of the road name, and this road has previously been entered for another patient, you may see a scroll arrow listing roads from which you can select. This inserts the remainder of the address, including the postcode.

- c. Town, County and Postcode must be completed. Locality is optional.
- d. Postcode – Make sure the postcode is correct. This may fill in from the road name.

23. OK – Click OK to confirm the address to enable the Add Contact Number button.

24. Enter the patient's home phone number on Add Contact Number. Select Telephone – Home in Type of Contact Number. Click OK. Further numbers can be added from the Address tab. Note that the home telephone number added on the Main Address entry screen (Contact Number – Add) is attached to the address. Personal contact numbers (mobiles etc) can be added from the Address tab under Contact Nos and are attached to the patient's record. Click on Close on the Address entry screen to exit back to the patient's Registration details.

TO MAKE AN APPOINTMENT FOR THE NEW PATIENT:

1. Make a computerized appointment with the Practice Nurse for a New Patient Medical at a time to suit.
2. Give prospective patient:
 - a. Practice Leaflet
 - b. NHS 24 Leaflet
 - c. GPR form
 - d. New Patient Questionnaire (Appendix I)
 - e. Our Partnership with You Leaflet (Appendix II)
 - f. Appointment card with date and time of appointment
 - g. Data Protection Act Information Leaflet.
3. Ask the patient to complete the GPR form and Questionnaire and return it so the receptionist can check that all areas have been completed appropriately.
4. GPR form and Questionnaire → Registrations tray → assign Doctor's code → Doctor's tray → Doctors signature → Registrations tray → Norma will

input registration data and Ethnicity onto clinical system → New Patient Forms box → Susan will input new patient questionnaire data.

5. If patient makes a New Patient Medical appointment, ask patient to bring a specimen of urine in any clean glass container or if unable to do so, be able to supply a specimen of urine at the time of the New Patient Medical.
6. Computerized records are constructed as per the practice Medical Records Policy (Appendix III), the GPR form is checked for completeness and given to the partner accepting patients, to sign. Thereafter the form is scanned into the patient record and filed. File kept in stationery cupboard.

(b) Registration of Children under the age of 5

The Mother/Father/Guardian of the child/ren will be requested to complete a Practice Registration Sheet (Appendix I) and a GPR form and return to the practice. Complete registration procedure as described above.

(c) Registration of Newborn

The health visitor will receive from the Parent/Guardian an A4 Birth Registration certificate with the Newborn details and instructions on how to register with a Practice. If this form is not available she will arrange for the Parent/Guardian to complete, sign and return a GPR form to the practice. On return of the completed form to the practice the registration procedure to be completed as described above. **The A4 Birth Registration Certificate should be put in the 'Registrations Tray'** back office to be sent to Aberdeen.

(d) Registration of Housebound Patients

Any prospective patient who is unable to attend the surgery due to mental or physical disability will receive a visit from a member of the Primary Healthcare Team. They will assist the patient or their carer to complete the necessary paperwork (Practice Registration Sheet and GPR form), give them a copy of the Practice Leaflet, Out of Hours Leaflet and the Rights and Responsibilities Leaflet. On return of the completed forms to the practice, the procedure will be completed as per **5(a)** above.

(e) Registration of Overseas Patients from a country without a Reciprocal Agreement:

As **(a)** above plus proof of eligibility must be provided by patient before a GPR form can be sent to Practitioner Services, if they have not registered with a GP in Britain before.

This can take the form of:

Evidence of Eligibility

- ◆ EHIC (replaced EH111 in 2005) or Passport
- ◆ Students – Letter from Educational Institute
- ◆ Employment – Letter from employer
- ◆ Permanent Residence – Letter from Home Office, utility bill
- ◆ Entry visa in passport if period covered is for twelve months or more.
- ◆ Any other document which confirms residency in UK for twelve months or more.

If in any doubt contact the Practice Manager. Full Scottish Office Regulations covering overseas visitors are in the folder at Reception.

A photocopy of the submitted proof of residency will be scanned into the patient's electronic medical record. The original document to be returned to the patient.

The onus is on the patient to comply with the request for proof, otherwise they will be seen as private patients.

Dependants automatically become eligible when residency has been established for parent/husband. A copy of the certificate of childhood immunisation to be requested of a parent for children under the age of 6 years, when requesting registration. This information to be forwarded to the SIRS database. The copy residency will be scanned into the patient's electronic medical record.

Allocation of Patients:

The practice will receive a phone call from Practitioner Services with patient details and the Doctor's name.

Fully register the patient with the named doctor.

- Add the Read Code #912A

Practitioner Services Contact: 01224 358473

Registration process of a new patient using Vision (after GPR form signed by one of the doctors)

First check using; **DATE OF BIRTH** that the patient is not already on the patient register

1. Select Registration from the Home menu on the Vision front menu.
2. Click on 'Select Patient' button (blue person icon).
3. At the Select Patient screen, make sure that 'Active Patients only' is not selected.
4. Change the Search Attribute to Date of Birth, then enter the patient's date of birth in the Search Details field, and press Enter.
5. If their name does appear on the list, then they are, or were, registered. If registration has expired, re-register them by answering Yes to This patient is no longer active – do you wish to continue? Then in Registration, select Action – Re-registration and follow the prompts.
6. If the message A patient could not be found is displayed, click OK to clear the message, and click on Cancel to exit from the Select Patient screen. Go to step 1 below to register the patient for the first time.

Add a new patient

1. Click on the icon to add a patient.
2. At the question: New, Selected or Existing?
 - a. If you select Existing, select another member of the same family in the same household, if you know one exists.
 - b. • If there is no member of the same family to your knowledge, then answer New.
 - c. • Select Selected if the last patient selected - and at the top of the screen - was a member of the same household – this means you can use the same address lines, and surname, if relevant.
3. At the **Registration Personal Details** screen, the fields in red are mandatory: Surname, Forename, Date of Birth, Sex, TP (the Health Authority you are linked to), Registered GP and NHS No. These must be completed before the screen can be accepted. If you selected a family member before adding some details such as Surname will already be filled in.

- a. Use the mouse or the Tab key to move from field to field.
- b. Forename2 and Other Forenames can be left blank if not known.
- c. Sex – type M for male or F for female, Press Tab.
- d. Registration status – Leave as Applied if this is a straightforward registration of a permanent NHS patient. Otherwise click on 'drop down' box and select appropriately from the picklist, eg temporary resident.
- e. TP (HB or CSA) – Type the first letter of the appropriate Health Authority name, and use the down arrow until the correct one is shown. Press Tab.
- f. Registered GP – Keep pressing the letter d until the correct GP is shown.
- g. NHS No – This field is shown in red. Type the number in without spaces if known. It can be left blank for adults in England/Wales if not known, but is mandatory for new babies if you have a 'Register of Birth Certificate'.
- h. When all details are complete, press Enter or click on the OK button.

4. At the Registration Card Type screen, select from FP4 (NHS patient registering with medical card), FP13 ex-services, FP58 ('Register of Birth Certificate'- remember, you need to enter the **NHS No.**), or None of these, eg if patient does not have any of the above.

5. At the Transfer-in screen, if FP4, complete the mandatory fields in red to allow the new registration to go through to the Health Authority.

Remember not to press Enter until all details are filled in on the screen. Use the Tab key or the mouse to move from field to field.

GP Notes – Optional. Use only if specific notes need to be sent to the HA regarding the new patient registration.

Place of Birth – Mandatory if no NHS number has been entered, but should be completed. If the Place of Birth is not known, type in Unknown.

Previous Address and Previous GP Name – Both mandatory fields. If the information is not available, it is possible to enter Unknown, but this should only be done if you cannot obtain the necessary information.

Previous Agency – The previous Health Authority is not mandatory, but should be completed to assist the new HA to find the patient's records.

OK – When all details have been completed, press Enter or click OK.

6. Registration - Personal: If at this stage you want to go back and change anything on a previous screen, select Action – Acceptance which returns through the above screens.

7. If you pre-selected another member of the same family before adding this new patient, the address may already be filled in.

Note If the address is already filled in, this is the minimum you need to do to register a patient. You can click OK to save the details now and accept that you have entered Incomplete details, which can be completed later.

8. To add the main address, when you first reach the main Registration – Personal screen, the focus (cursor) is on the Add button beneath the Main Address window, if no main address is present. Just press Enter to go into the Address Add screen.

9. At the Main Address Add screen, either the House Name or Number and Road must be completed:

- a. House Name – can be left blank, but should include any flat number or name of a property if there is one (eg Flat 1A, or Rose Cottage)
- b. Number and Road – can include the property number and road/street name, eg 21 High Street would have 21 in Number, and High Street in Road. If House is blank, Road must be entered, otherwise, Road is optional. If you type the first two or three letters of the road name, and this road has previously been entered for another patient, you may see a scroll arrow listing roads from which you can select. This inserts the remainder of the address, including the postcode.
- c. Town, County and Postcode must be completed. Locality is optional.
- d. Postcode – Make sure the postcode is correct. This may fill in from the road name.
- e. OK – Click OK to confirm the address to enable the Add Contact Number button.

10. Enter the patient's home phone number on Add Contact Number. Select Telephone – Home in Type of Contact Number. Click OK. Further numbers can be added from the Address tab. Note that the home telephone number added on the

Main Address entry screen (Contact Number – Add) is attached to the address. Personal contact numbers (mobiles etc) can be added from the Address tab under Contact Nos and are attached to the patient's record. Click on Close on the Address entry screen to exit back to the patient's Registration details.

11. On the Registration tab, select the Usual GP if different from the Registered GP.
12. If you know you can claim rural mileage for this patient, click on the Other tab and enter a figure in RPP Mileage.
13. Check the Dispensing box if the patient will be a dispensing patient.
14. If the field at the top of the screen is checked, some details are missing. Click back through the tabs for a red mandatory field, such as the Main Address, which has not been completed. Try and enter that if possible. You can also select Action - Acceptance to check for other missing details.
15. If the field 'Incomplete Details' is ticked, this usually indicates that the NHS number is missing. Note that this is not mandatory at this stage (**except for new babies**) but should be completed if known.
16. To save the new registration, click on the OK button. You will be warned if the patient has incomplete details. If possible answer No and enter the missing details. Otherwise complete these at a later time.
17. If the registration is complete, Registration Links practices will generate an Acceptance Transaction to the HA. The Registration screen of the newly added permanent patient remains "frozen" and cannot be amended until approval is sent electronically by the HA in a few days. In the meantime, if you try to edit this patient's record, you will be unable to as it is view only.
18. **Child under five years of age** – give a copy of summary sheet to Health Visitor and write the name and address of patient's previous G.P.
19. **Adding Read Codes in Consultation Manager after patient has been registered**
 - a. New Baby **#9114.12** (registration code) **#9348** (Summarized code)
 - b. Immigrant **#133L.00** (registration code)
 - c. Donor **#8922**
20. **Ethnicity, Language & Interpreter required or not** to be entered via QOF tab – select from list.

21. When registering New Babies add Summary code #9348 add comment new baby nil to note.

22. When registering an Immigrant if nothing written in journal Summary code #9384 can be added with comment nil to note.