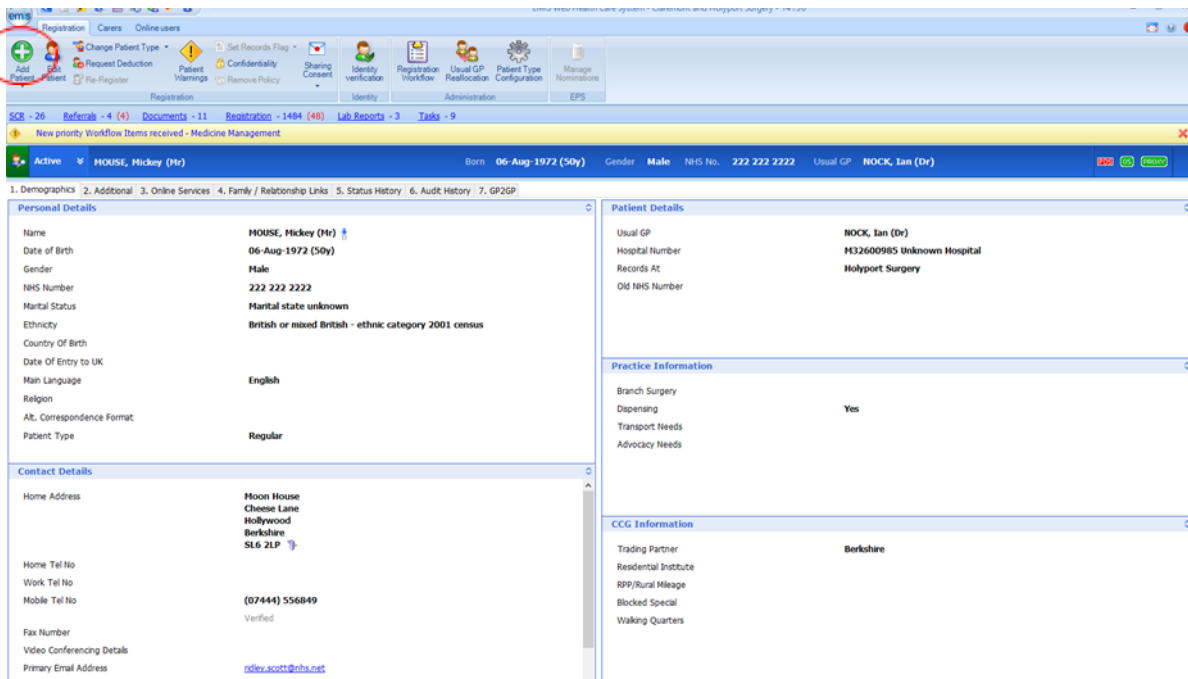
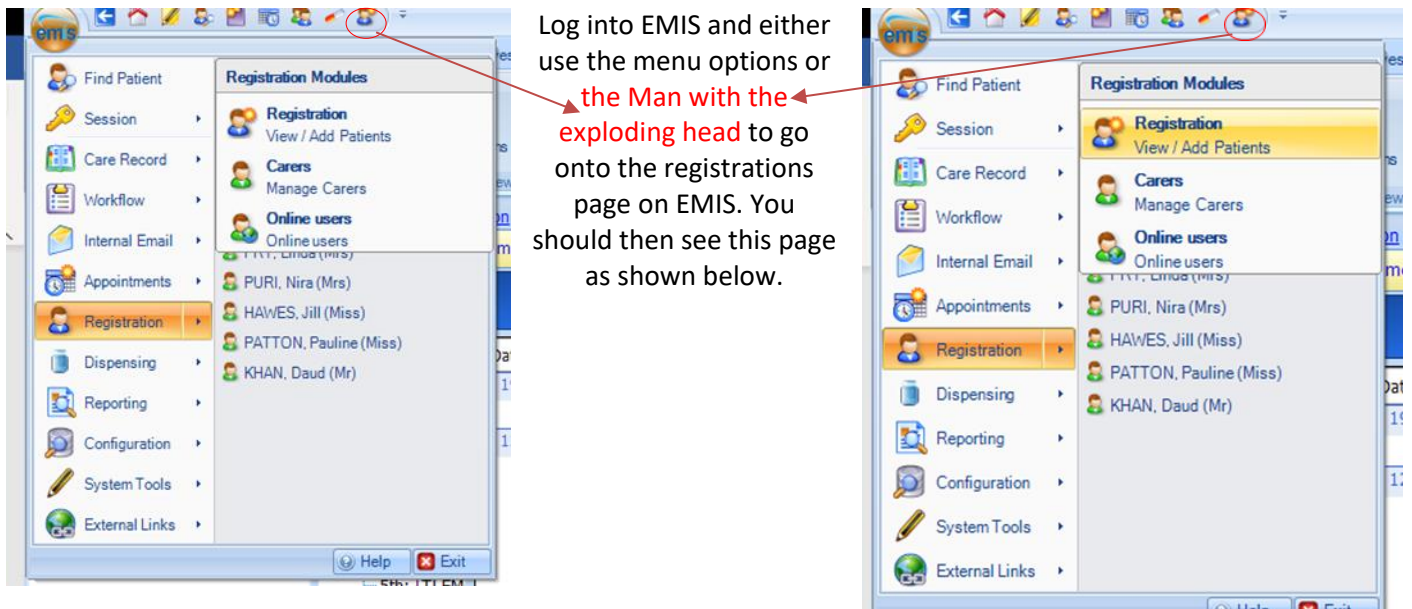


If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Registrations How to Guide

From March you do not need ID for Registrations. You only need ID for Online Services and amending name/DOB etc after the patient has been registered. It is illegal to scan/photocopy ID
Before you start any registrations make sure to open these 3 websites:

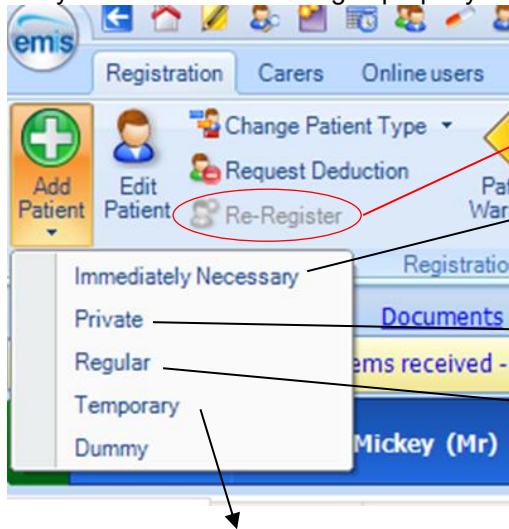
- Practice Boundary - [GP Map Public \(healthgis.nhs.uk\)](http://GP Map Public (healthgis.nhs.uk))
- Postcode finder - Postcode Finder - Find an address | Royal Mail Group Ltd
- Spine - <https://portal.national.ncrs.nhs.uk/portal/> then Launch Summary Care record.



Once you are on this screen you can start a new registration by pressing the **Add Patient** button circled above.

Once you have pressed this button you will be presented with a list of options representing each patient type, we can have as shown below.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)



Do not use this button for re-registering patients. The registration will not go through correctly.

Immediately Necessary – Only to be used when a pt needs to be seen immediately (e.g., visiting for a day but needs to see a clinician straight away)

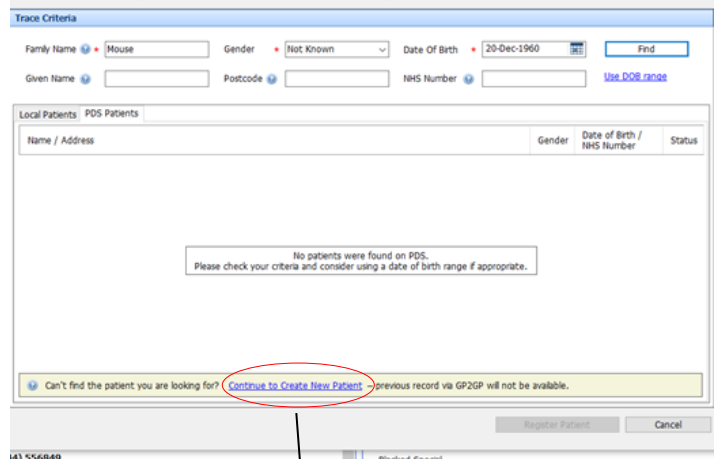
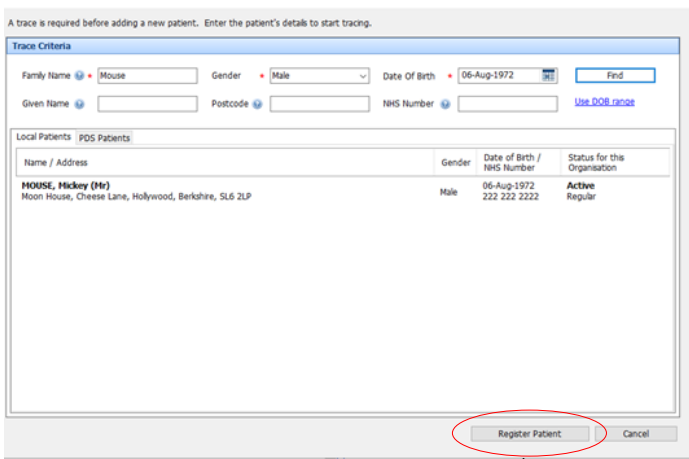
Private – For private pts only

Regular – For any Pt (new or returning) who lives in our area and wants to be our permanent pt. Use this when the patient lives in our area and needs to be seen straight away and wants to be our Pt.

Temporary – For a **visiting** pt who is staying here for a limited amount of time but lives OOA (e.g., visiting family or on holiday). This can be either a long stay (3 months) or a short stay (3 weeks). **Please note temporary pts cannot be changed into regular patients until the temporary registration has expired.**

Overseas Visitors - Anyone, regardless of nationality, residency, or immigration status, may register and consult with a GP without charge. (Use the immediately necessary or temporary options based on the descriptions above).

Once you know which category your patient falls under you will be then shown a page which allows you to trace the patient. If you cannot find a patient on here, then double check on the [spine portal](#) (**if adding a date of birth into spine it must be written like this 01-01-2023**) link listed at the top of this page to do a more detailed search. Sometimes pt may not give you the correct information on the registration form (e.g., not putting an NHS number or names written in wrong sections) so ensure to check the [spine](#) before completing this page to have better information. Add in your information that is on the registration form. When the pt is found then the option to Register Patient will come up, click this to continue with the registration.

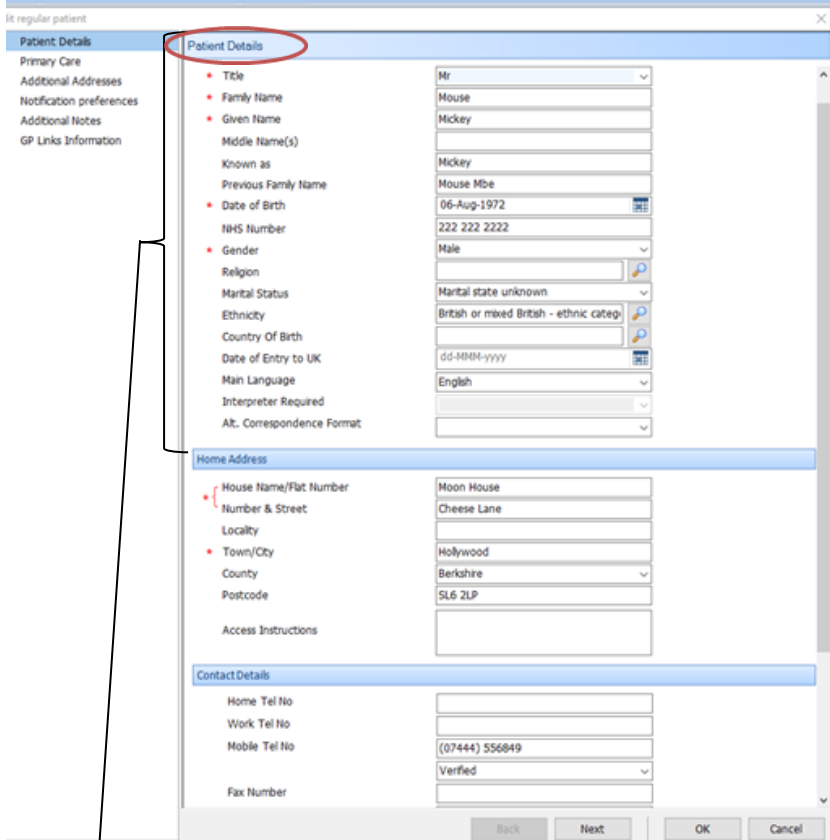


If your Pt's information comes up, click on it, and then press the Register Patient button. **If the Pt is saying inactive on this page still click on it and re-register the patient the same way as you would for a new pt.**

Inactive
Regular

If you have double checked all your information on spine and it still comes up like this, then you can **Continue to Create New Patient**

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)



This is the start of the registration. Make sure you add in all the information accurately. Use the drop down boxes when given the option. E.G. Title, Gender, county. If the pt has a preferred name put it in the 'known as box' Use the search icons for the ethnicity and country of birth as they have specific codes that MUST be put in. You must put in the information listed below:

- Title
- Family Name
- Given Name
- DOB
- NHS number if they have one
- Gender
- Ethnicity
- Country of birth
- Address
- Contact details e.g mobile and email (**make sure to verify these and all numbers must be uk numbers or we cannot contact the pt**).

Patient Details:

If the patient, you are registering has been traced by the spine a lot of the details on here will already be put in but check against the registration document to ensure all the information is correct.

In this example Mickey Mouse:

Title: Mr (From drop down selections)

Family Name: Mouse

Given Name: Mickey

Middle Names:

Known As: Mickey

Previous Family Name: Mouse Mbe

Date of Birth: 06.08.72

NHS Number: 222 222 2222 (may not have one if from out of country)

Gender: Male (From Drop down selections)

Religion: (Do not need to add)

Marital Status: (Do not need to add)

Ethnicity: British (From Codes shown on Page 4)

Country of Birth: Born in England (From Codes shown on Page 4)

Date of entry into UK: (Only to be used if not born in England)

Main language: (Use if English is not their main language & use drop down selections)

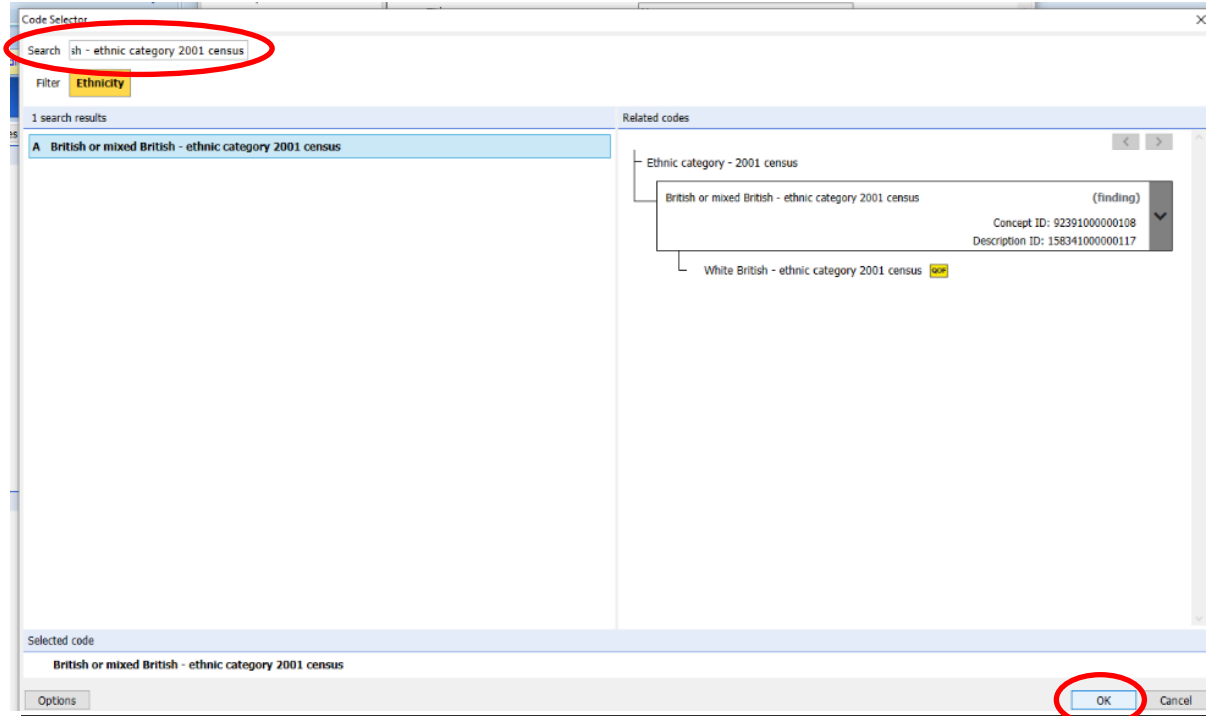
Interpreter required: (Only if main language is not English & use drop down selections)

Red = Required

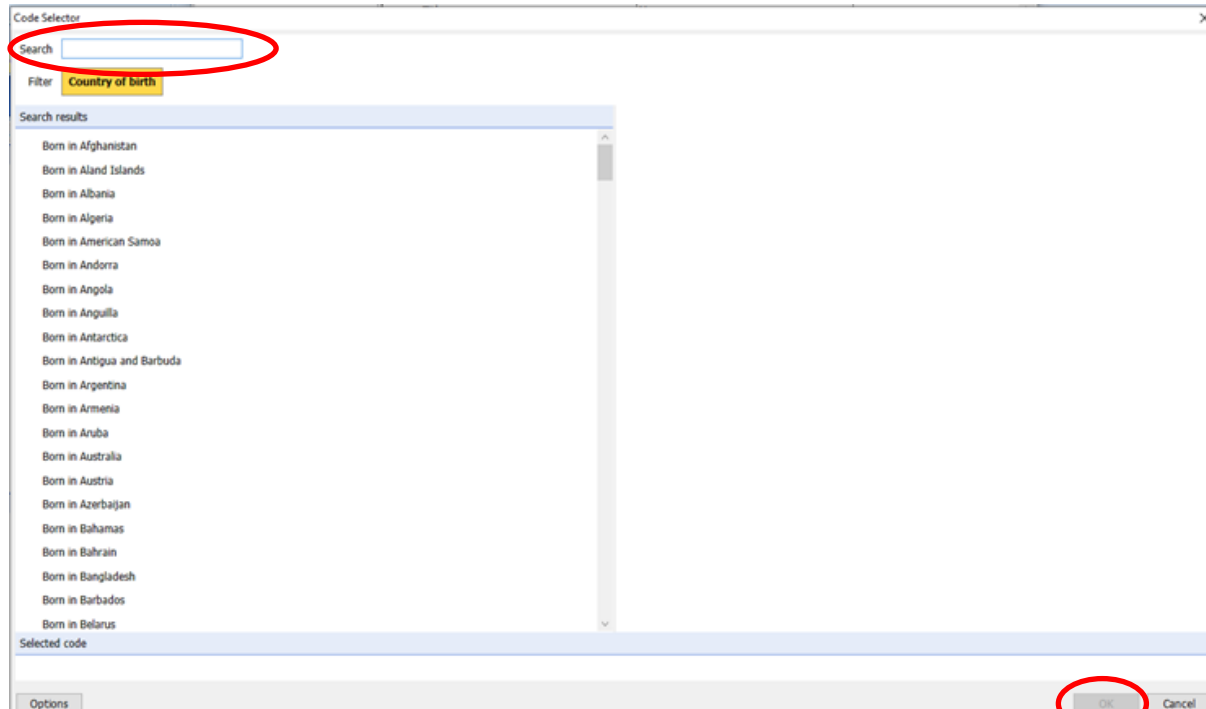
If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Ethnicity and Country of Birth:

Ethnicity and Country of Birth have a search button as they are QOF indicators and require codes to ensure they are put onto the patients notes correctly. They look like the images below:

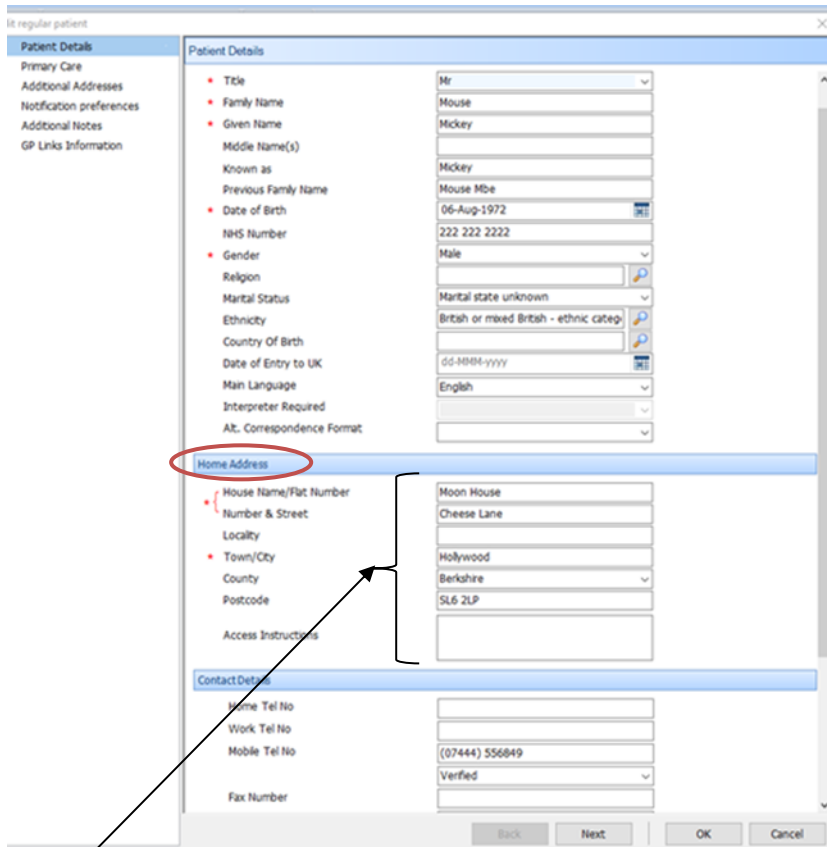


For ethnicity type into the search bar the ethnicity you are looking for, once found click on it and press OK.



For Country of Birth type into the search bar "Born in (Country)," once found click on it and press OK.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Home Address:



It regular patient

Patient Details

- Title: Mr
- Family Name: Mouse
- Given Name: Mickey
- Middle Name(s): Mickey
- Known as: Mickey
- Previous Family Name: Mouse Mbe
- Date of Birth: 06-Aug-1972
- NHS Number: 222 222 2222
- Gender: Male
- Religion: [Search]
- Marital Status: Marital state unknown
- Ethnicity: British or mixed British - ethnic categ. [Search]
- Country Of Birth: [Search]
- Date of Entry to UK: dd-mm-yyyy
- Main Language: English
- Interpreter Required: [Search]
- Alt. Correspondence Format: [Search]

Home Address

- House Name/Flat Number: Moon House
- Number & Street: Cheese Lane
- Locality: Hollywood
- Town/City: Berkshire
- County: Berkshire
- Postcode: SL6 2LP
- Access Instructions: [Text Area]

Contact Details

- Home Tel No: [Text Area]
- Work Tel No: [Text Area]
- Mobile Tel No: (07444) 556849
- Fax Number: Verified

Buttons: Back, Next, OK, Cancel

Addresses must be checked on the [postcode finder](#) and the [practice boundary](#) before you carry on with the rest of the registration. They also need to be written correctly in the correct boxes.

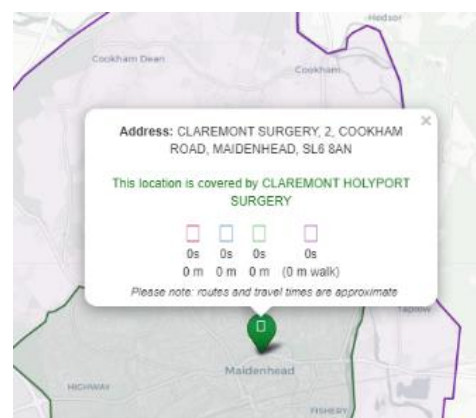
For example, Claremont's address should be written like this:

- **House Name/Flat number:** Claremont Surgery
- **Number & Street:** 2 Cookham Road
- **Locality:**
- **Town/City:** Maidenhead
- **County:** Berkshire (from drop down box)
- **Postcode:** SL6 8AN

Remember to **add the county** even though it does not come up on the Royal Mail postcode finder otherwise the registration will not come through the system correctly. If the Pt is Out of Area on the practice boundary, stop the registration by pressing cancel and contact the patient to tell them to register somewhere closer to them.

**Claremont Surgery
2 Cookham Road
MAIDENHEAD
SL6 8AN**

Royal Mail Postcode Finder

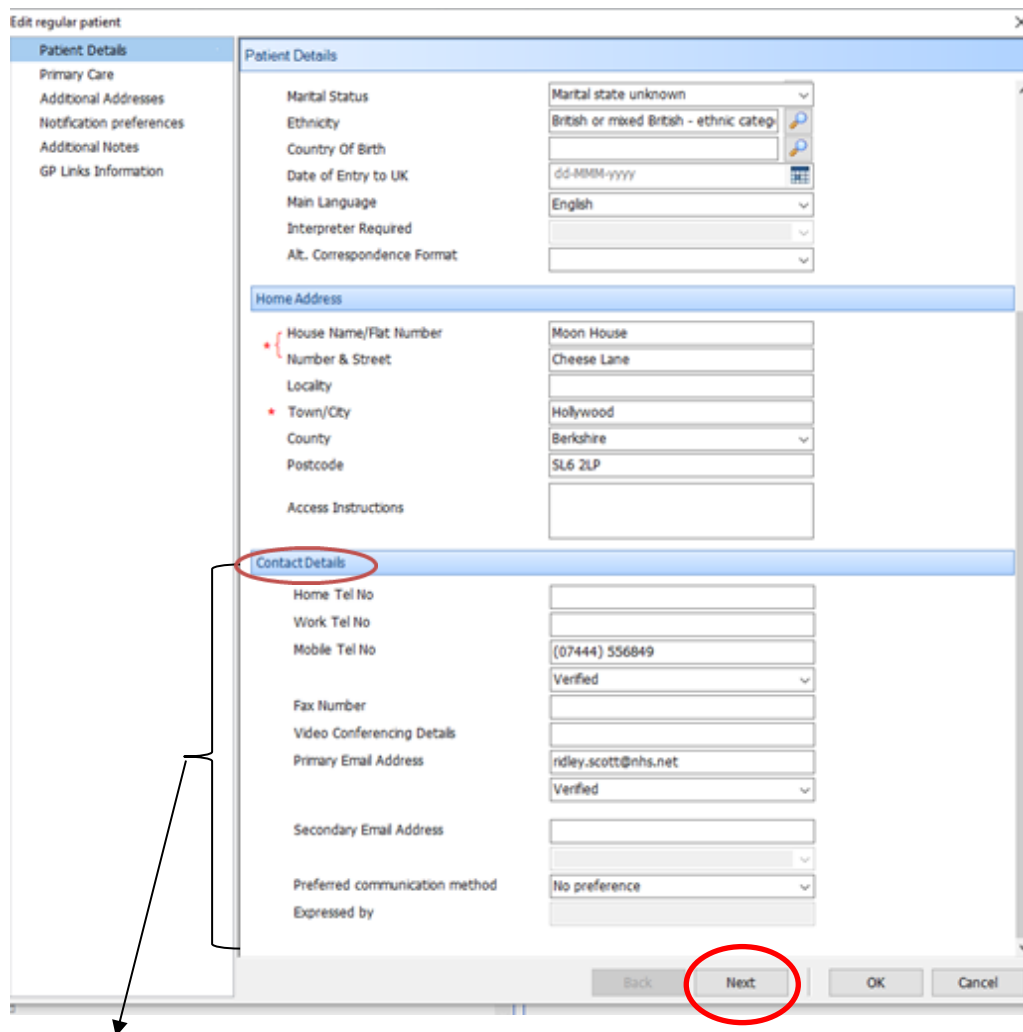


Practice Boundary found on [GP Links](#)

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Contact Details:

Please note all phone numbers must be UK numbers. Do not put mobile numbers into the home number box.



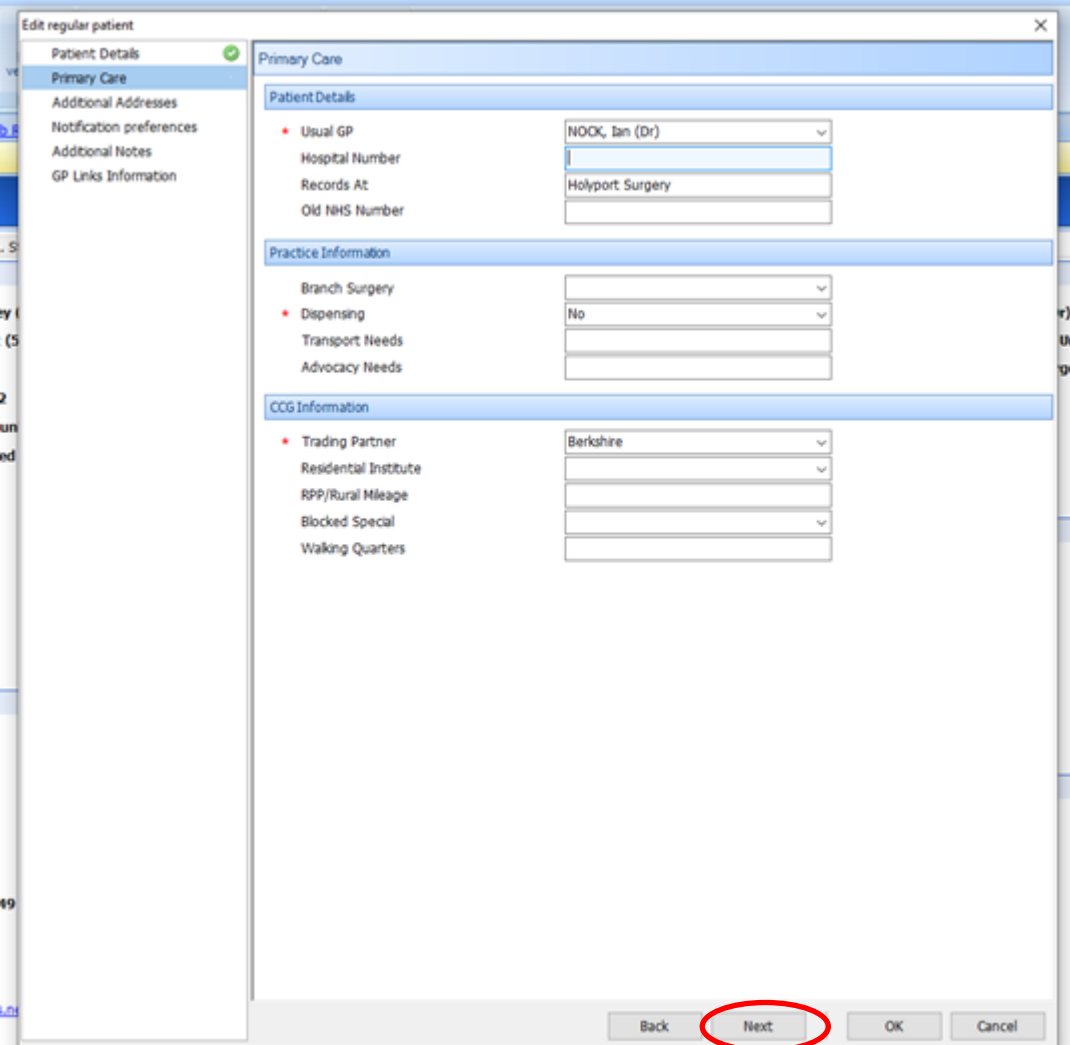
Edit regular patient
 Patient Details
 Marital Status: Marital state unknown
 Ethnicity: British or mixed British - ethnic categ
 Country Of Birth:
 Date of Entry to UK: dd-MMM-yyyy
 Main Language: English
 Interpreter Required:
 Alt. Correspondence Format:
 Home Address
 House Name/Flat Number: Moon House
 Number & Street: Cheese Lane
 Locality:
 Town/City: Hollywood
 County: Berkshire
 Postcode: SL6 2LP
 Access Instructions:
 Contact Details
 Home Tel No:
 Work Tel No:
 Mobile Tel No: (07444) 556849
 Verified: Verified
 Fax Number:
 Video Conferencing Details:
 Primary Email Address: rdley.scott@nhs.net
 Verified: Verified
 Secondary Email Address:
 Preferred communication method: No preference
 Expressed by:
 Back Next OK Cancel

Make sure to verify the contact details by adding verified in the 2nd box underneath the mobile number and the Email address. You do not need to fill put the preferred communication method box as there is a page for consent for email and SMS.

Once all this is complete you can go to the next page (Primary Care) by pressing the **next** button. **Do not press OK.**

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Primary Care:



The screenshot shows a software window titled 'Edit regular patient' with a sidebar on the left containing menu items: Patient Details, Primary Care (highlighted), Additional Addresses, Notification preferences, Additional Notes, and GP Links Information. The main area is titled 'Primary Care' and contains three sections: 'Patient Details' with fields for Usual GP (dropdown: 'NOCK, Ian (Dr)'), Hospital Number, Records At (dropdown: 'Holyport Surgery'), and Old NHS Number; 'Practice Information' with fields for Branch Surgery, Dispensing (dropdown: 'No'), Transport Needs, and Advocacy Needs; and 'CCG Information' with fields for Trading Partner (dropdown: 'Berkshire'), Residential Institute, RPP/Rural Mileage, Blocked Special, and Walking Quarters. At the bottom, there are four buttons: 'Back', 'Next' (circled in red), 'OK', and 'Cancel'.

Usual GP:

- If your patient is a Claremont Pt use the registering GP for CM
- If your patient is a Holyport Pt use the registering GP for HP
- If your patient is a baby, then make sure the baby has the same GP as the mother.
- If your patient is a reregistering patient, they can have the same GP as previously.

Records at:

- Put whichever surgery the patient is registering with (if stuck use the [Practice Boundary](#) as that will tell you which Surgery)

Dispensing:

- We do not dispense do ensure to use the drop-down box and put **No**

Trading Partner:

- Our Trading Partner is **Berkshire** so select from drop down box.

Residential institute:

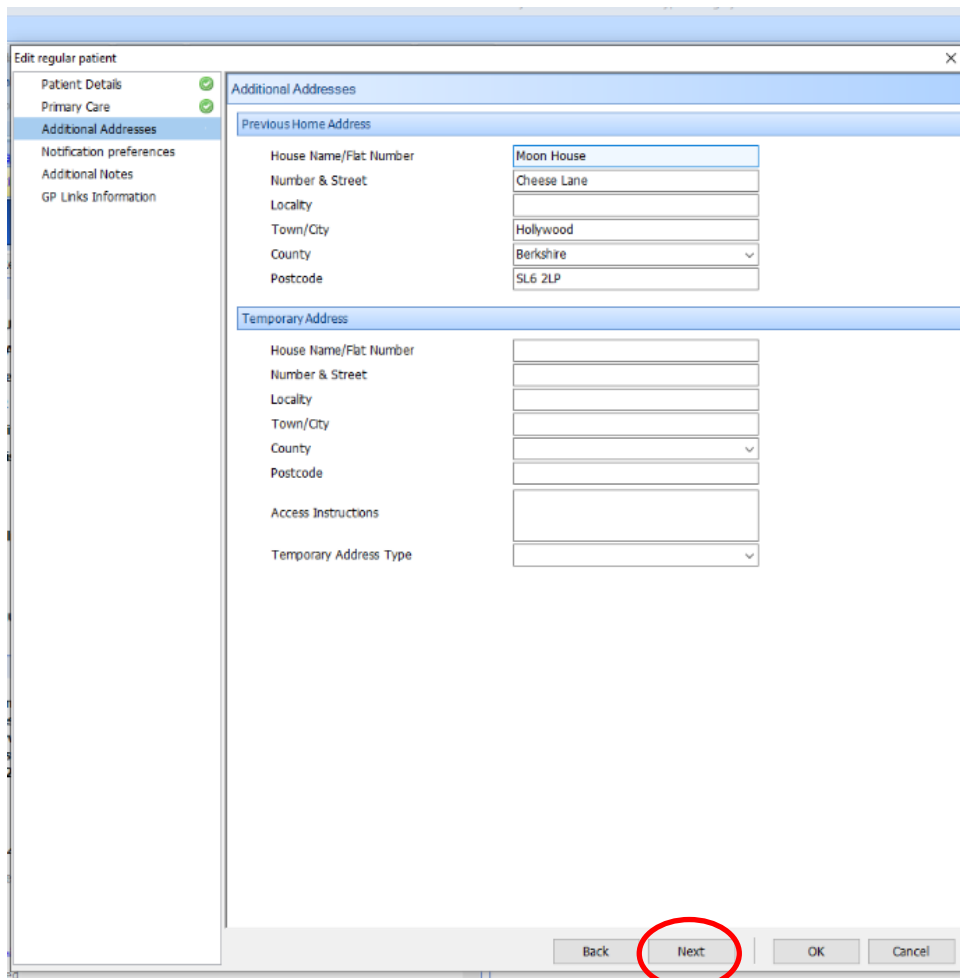
- If pt is in a residential home e.g., Meadowbank, Foxleigh then you select **Nursing/residential** from the drop-down box. You only use this for that purpose and is not necessary for any other type of registration.

Once this information is put in and completed press the **next** button to go to Additional Addresses.

Do not press OK.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Additional Addresses:



The screenshot shows a software window titled 'Edit regular patient'. On the left is a navigation menu with options: Patient Details, Primary Care, Additional Addresses (selected), Notification preferences, Additional Notes, and GP Links Information. The main area is titled 'Additional Addresses' and contains two sections: 'Previous Home Address' and 'Temporary Address'. The 'Previous Home Address' section has fields for House Name/Flat Number (Moon House), Number & Street (Cheese Lane), Locality, Town/City (Hollywood), County (Berkshire), and Postcode (SL6 2LP). The 'Temporary Address' section has empty fields for House Name/Flat Number, Number & Street, Locality, Town/City, County, Postcode, Access Instructions, and Temporary Address Type. At the bottom, there are four buttons: Back, Next (circled in red), OK, and Cancel.

Previous Home Address:

If they have a previous UK home address, make sure this is written in correctly. If they did not write one down and have not come into the country recently then contact the patient to find out. Use the **postcode finder** to ensure it is written correctly. All the rules that apply for their current address also apply for their previous home address. Make sure you have everything in the correct box and that you have chosen the county from the drop-down box.

If they have recently entered the country, you can put down their previous address from their old country or just N/A if you do not have that information.

Temporary Address:

Only to be used for temporary patients.

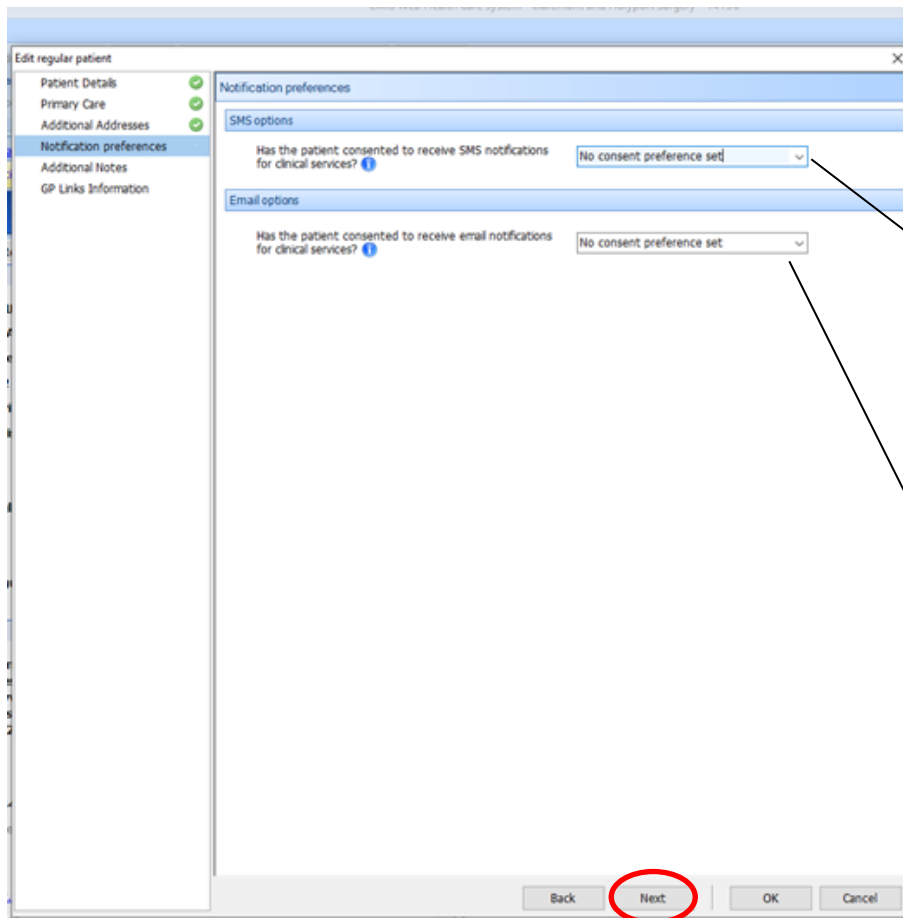
All the same address rules apply. Use the **postcode finder** to double check the address and make sure to add the county.

Also select the Temporary Address Type from the drop-down selection

Once you have completed this page you can press **next** to go to Notification Preferences. **Do not press the OK button.**

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

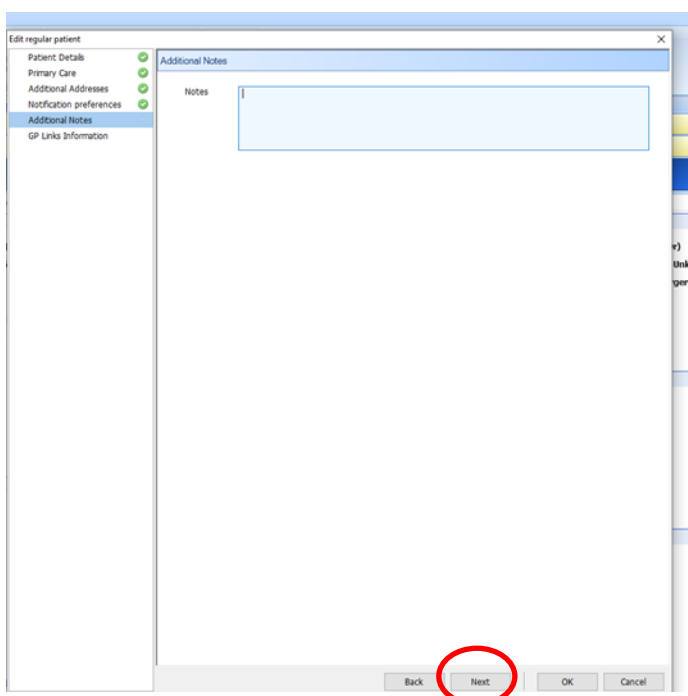
Notification Preferences:



- This is for the patients consent to receive texts and emails from us.
- If the patient has consented to texts, then use the drop-down selection to select yes. If they have declined, then select no.
- If the patient has consented to emails, then use the drop-down selection to select yes. If they have declined, then select no.
- You must fill this page accurately otherwise you will be going against the wishes of the Pt which can lead to complaints etc.

When you have completed this page press **next** to go to Additional Notes. Do **not** press the OK button.

Additional Notes:

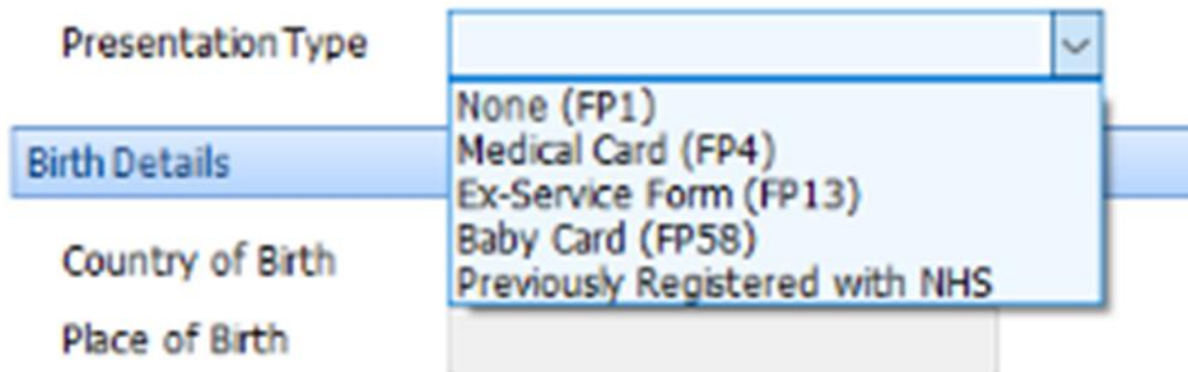


You do not need to fill in this page. Press the **next** button to go to the GP Links Information. Do **not** press the OK button.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
GP Links Information:

This is the one of the most important parts of the registration process as if done incorrectly it can lead to no GP2GP, no records from previous surgeries and even duplicate NHS numbers. This page must be completed and not missed.

The first thing you need to do on this page is put in the **presentation type**. This will tell the spine if this patient needs an NHS number, if they are a baby or if they have been previously registered with a surgery in the NHS. There are 5 different presentation types:



The image shows a screenshot of a web form. On the left, there are labels for 'Presentation Type', 'Birth Details', 'Country of Birth', and 'Place of Birth'. A dropdown menu is open for 'Presentation Type', showing five options: 'None (FP1)', 'Medical Card (FP4)', 'Ex-Service Form (FP13)', 'Baby Card (FP58)', and 'Previously Registered with NHS'. A blue box highlights the 'Birth Details' label.

None – To be used when the patient is new to the country and has never been registered anywhere in England.

Medical Card - Do not use this type as it is no longer used anymore.

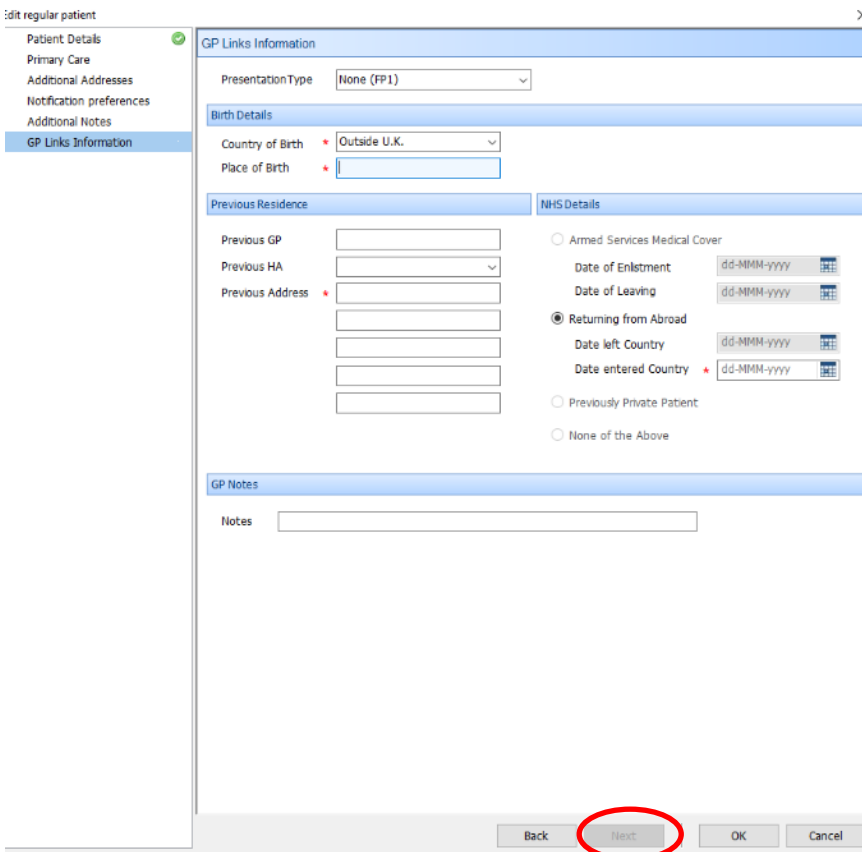
Ex-Service Form – For UK veterans and anyone who has left the military, this is because they have priority using NHS services.

Baby Card – For babies

Previously Registered with NHS – For anyone who has been previously registered with a GP surgery in the UK.

It is essential that on each presentation type you fill in every piece of information it is asking for to ensure the registration is completed correctly. I have created a page for each presentation type and what you need to fill in to ensure the registration is done correctly.

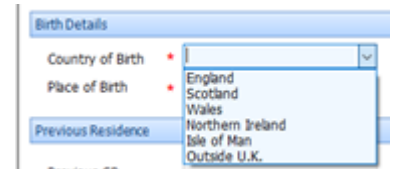
If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Presentation Type – None:



Anything typed in red is compulsory information and must be added to complete the page.

Birth Details - start with the **Country of Birth**.

There is a drop-down selection for this with the following selections:
 Once you have selected the option accurate for your pt you then need to fill in the **place of birth**. This doesn't need to be the full place but for example they were born in the USA the place of birth would be the USA.



Previous Residence – For this presentation type you must fill in the **Previous Address**. If for example their previous address is in the USA you can write in USA and if you do not know their previous address from the country they have left it is also acceptable just to write in N/A. If you have already wrote down a previous address in the additional addresses section it will automatically come up in the previous address boxes.

Date entered Country – This must be the actual date the pt had entered the country. If the pt did not put this information on their registration form then you must contact them to find out. Once you know the date just type it into the box.

Once this has been completed you can then press the **next** button to go to the next page GP2GP. (Mickey is already a pt so the last page does not show for him only new registrations)

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Presentation Type – Ex-Service Form:

The screenshot shows a software interface for editing a regular patient's details. On the left is a navigation menu with options like 'Patient Details', 'Primary Care', and 'GP Links Information'. The main area is divided into several sections: 'GP Links Information' (with a dropdown for 'Presentation Type' set to 'Ex-Service Form (FP13)'), 'Birth Details' (with fields for 'Country of Birth' and 'Place of Birth', where the latter is highlighted in red), 'Previous Residence' (with fields for 'Previous GP', 'Previous HA', and 'Previous Address'), and 'NHS Details' (with radio buttons for 'Armed Services Medical Cover', 'Returning from Abroad', 'Previously Private Patient', and 'None of the Above', along with date fields for enlistment, leaving, and entering the country). At the bottom, there is a 'GP Notes' section with a text area and a set of buttons: 'Back', 'Next' (circled in red), 'OK', and 'Cancel'.

Anything typed in red is compulsory information and must be added to complete the page.

Birth Details- Add the Pts **place of birth**.

Date of Enlistment – If the Pt has not added this information, then please contact them.

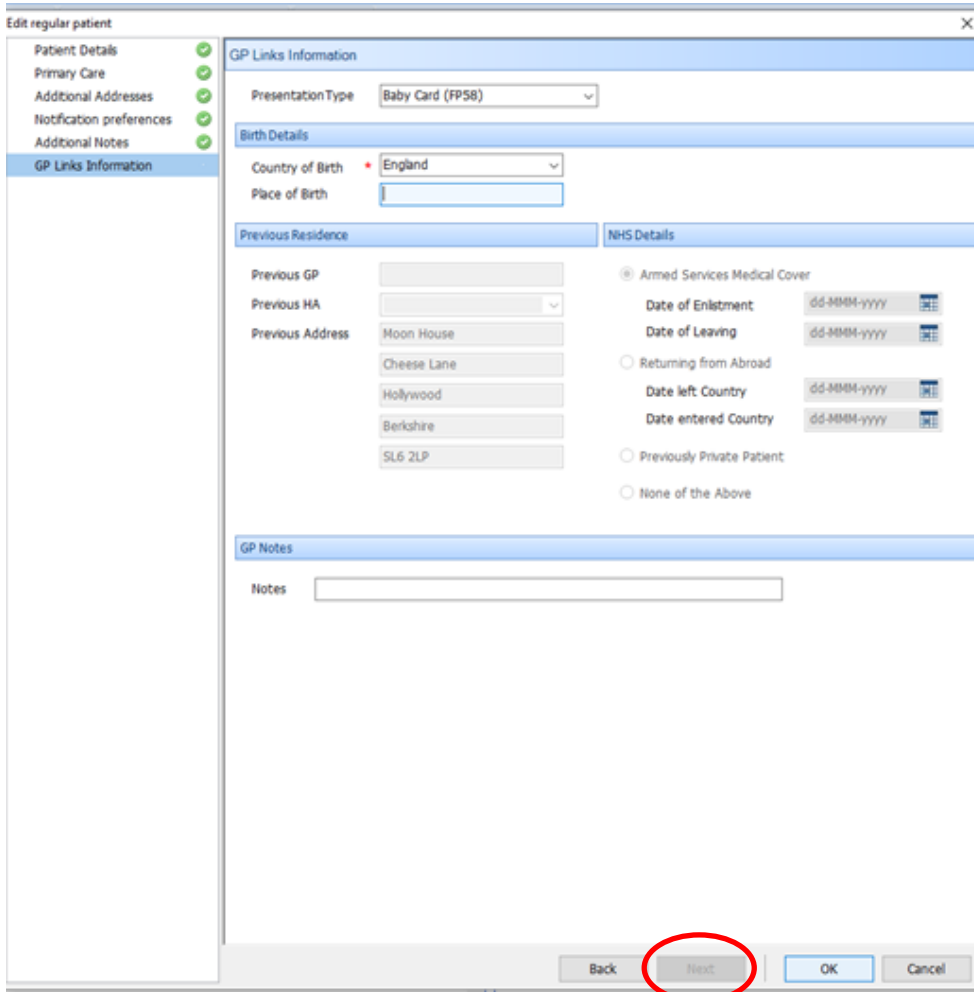
Date of Leaving – If the Pt has not added this information, then please contact them.

Previous address is not compulsory but will automatically come up in this section exactly how it was written in the additional addresses section.

Once this has been completed you can then press the **next** button to go to the next page GP2GP. (Mickey is already a pt so the last page does not show for him only new registrations)

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Presentation Type – **Baby Card**:



Anything typed in red is compulsory information and must be added to complete the page.

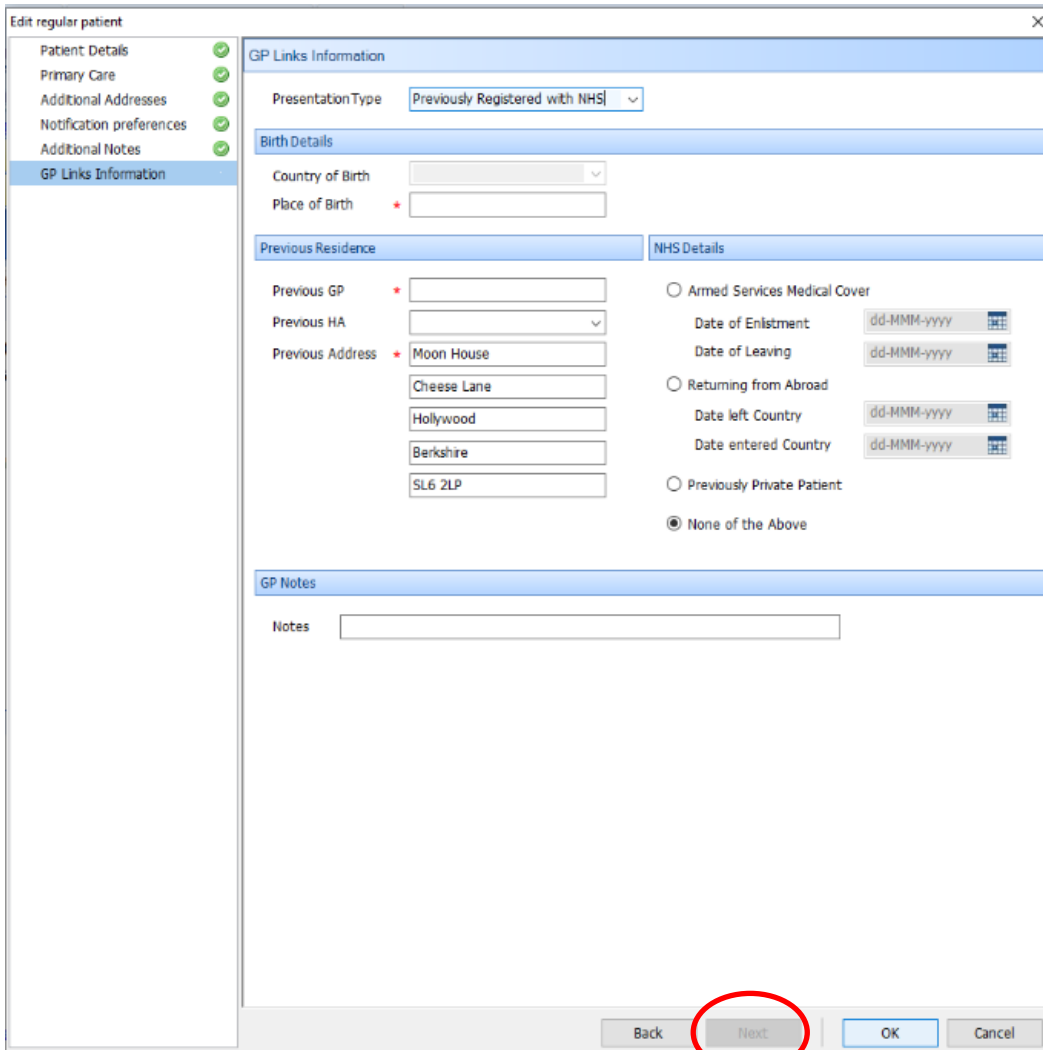
Birth Details – Start with the **Country of Birth** and choose from the drop-down selection as shown. If they are born outside of the UK, you need to use presentation type none. Most of the baby registrations you see will be born in England. You then need to complete the **Place of Birth** this will be simple as it should be on the pt.'s registration form.



Once this has been completed you can then press the **next** button to go to the next page GP2GP. (Mickey is already a pt so the last page does not show for him only new registrations)

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Presentation Type – Previously Registered with NHS:



Anything typed in red is compulsory information and must be added to complete the page.

Birth Details – Make sure to add the Pts **place of birth** as they have put it on the registration form.

Previous Residence -

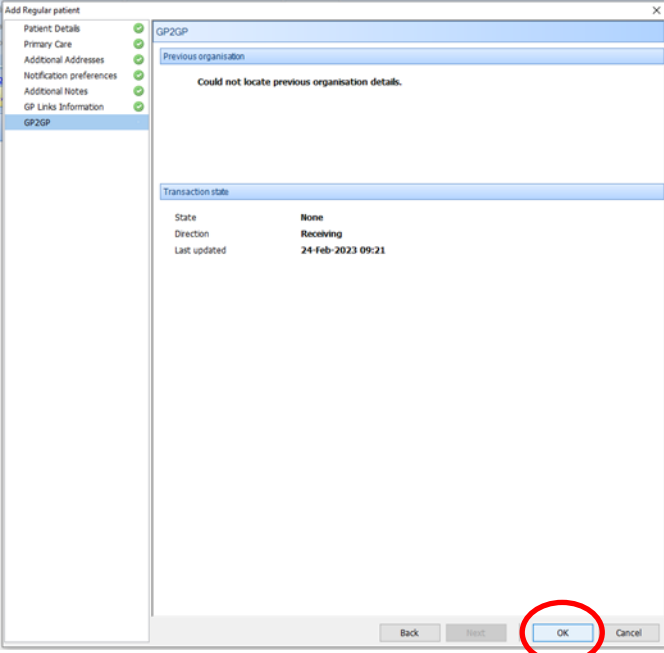
- **Previous GP** – We need this information to ensure we can receive GP2GP for the patient. If they have not given their previous GP Surgery, you need to contact them and get this information. Make sure to write the name of the previous surgery not the name of the Dr who they saw.
- **Previous Address** – If this has been filled out correctly on the Additional Addresses Page it should automatically come through onto this page. If it does not make sure to add this information exactly how it was written on the Additional Addresses page. Make sure to use the postcode finder as this is what the SPINE uses. If you do not know the county, make sure to look it up on the web as it is necessary information. **This is the patients previous address not the address of their previous surgery.**

Once this has been completed you can then press the **next** button to go to the next page GP2GP. (Mickey is already a pt so the last page does not show for him only new registrations)

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

GP2GP Page:

For this page you will see one of 2 pages as shown below



Add Regular patient

GP2GP

Previous organisation

Could not locate previous organisation details.

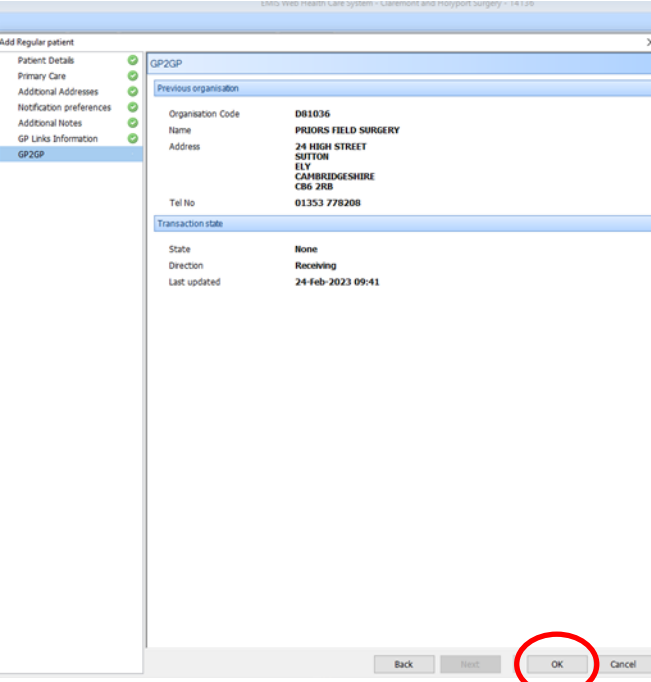
Transaction state

State	None
Direction	Receiving
Last updated	24-Feb-2023 09:21

Back Next **OK** Cancel

Usually seen after presentation types None and Baby Card. Shows we will not get GP2GP as they have no medical records here. This is completely normal.

Press **OK** to complete the registration.



Add Regular patient

GP2GP

Previous organisation

Organisation Code	D81036
Name	PRIORS FIELD SURGERY
Address	24 HIGH STREET SUTTON ELY CAMBRIDGESHIRE CB6 2RB
Tel No	01353 778208

Transaction state

State	None
Direction	Receiving
Last updated	24-Feb-2023 09:41

Back Next **OK** Cancel

Usually seen after presentation types Previously registered with NHS. This is to show that we should get GP2GP from the previous surgery listed on the page. This is completely normal.

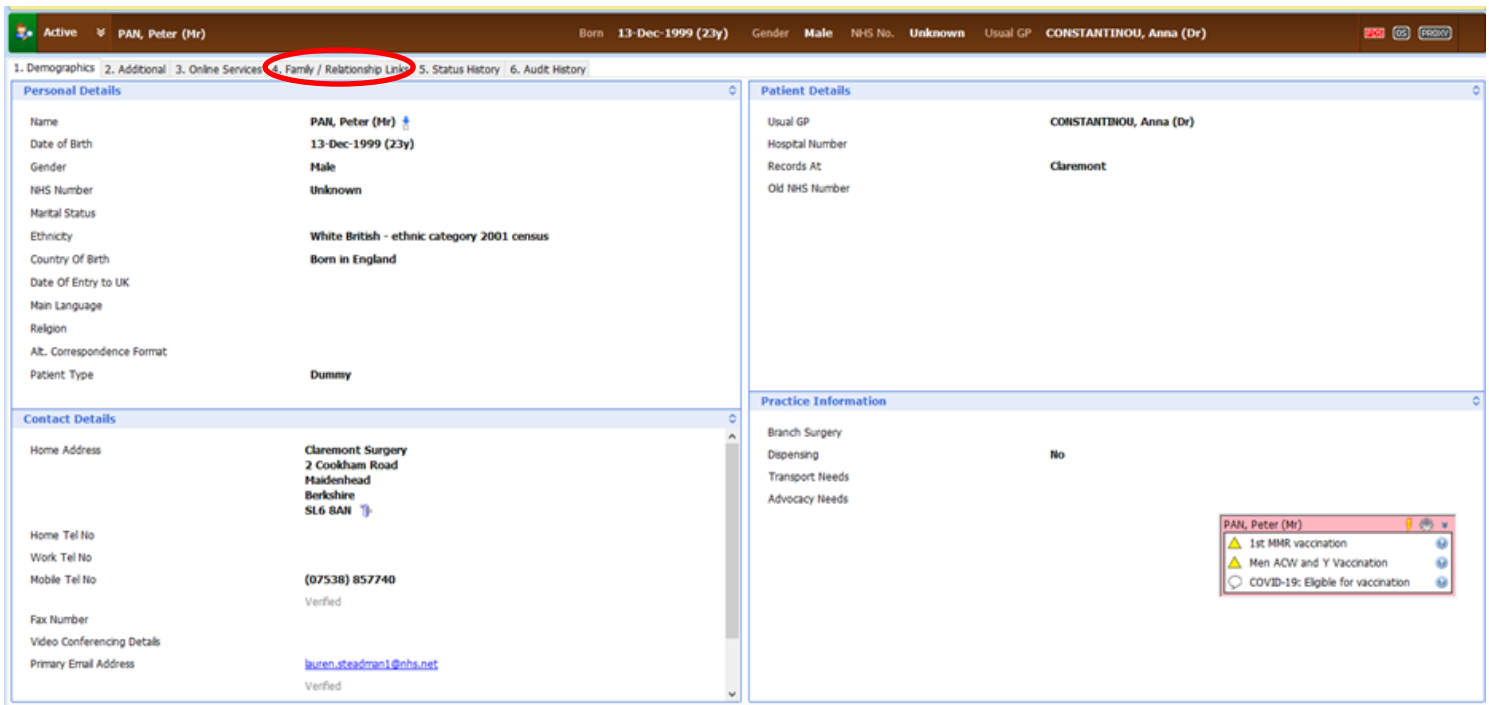
Press **OK** to complete the registration.

Once this is done you have completed the main part of the registration and will go onto the next steps.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

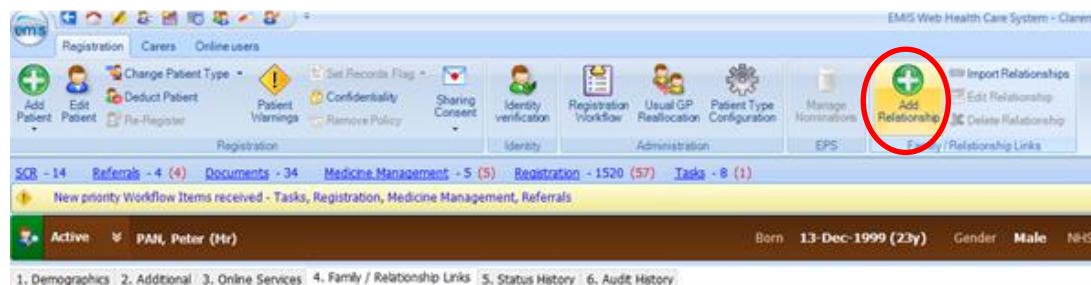
Next Steps: Pt is brown due to being dummy pt.

Family/Relationship Links:



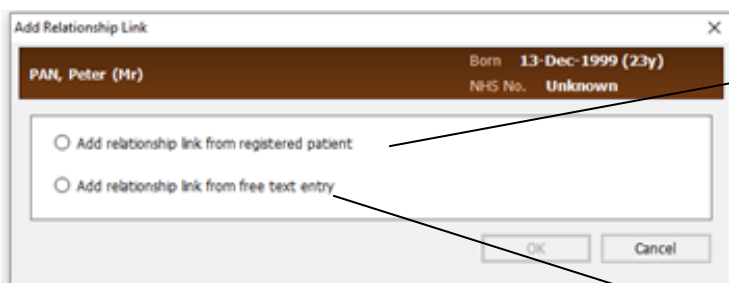
The screenshot shows the patient record for Peter PAN (Mr), born 13-Dec-1999 (23y), Male, NHS No. Unknown, Usual GP CONSTANTINOU, Anna (Dr). The 'Family / Relationship Links' tab is circled in red. The patient details include: Name: PAN, Peter (Mr); Date of Birth: 13-Dec-1999 (23y); Gender: Male; NHS Number: Unknown; Marital Status: Unknown; Ethnicity: White British - ethnic category 2001 census; Country of Birth: Born in England; Date of Entry to UK: Unknown; Main Language: Unknown; Region: Unknown; ALT. Correspondence Format: Unknown; Patient Type: Dummy. Contact details include: Home Address: Claremont Surgery, 2 Cookham Road, Maidenhead, Berkshire, SL6 8AU; Home Tel No: Unknown; Work Tel No: Unknown; Mobile Tel No: (07538) 857740; Fax Number: Unknown; Video Conferencing Details: Unknown; Primary Email Address: lauren.steadman1@nhs.net. Practice information includes: Branch Surgery: No; Dispensing: No; Transport Needs: No; Advocacy Needs: No.

Once you have completed the first part of the registration you will be brought back to this page. On this page you need to go to the family/relationship links section circled above.



The screenshot shows the EMS Web Health Care System - Claremont interface. The 'Add Relationship' button is circled in red. The interface includes a navigation bar with tabs for Registration, Carers, and Online users. The main area contains various icons for patient management, including Add Patient, Edit Patient, Deduct Patient, Patient Warnings, Confidentiality, Sharing Consent, Identity verification, Registration Workflow, Usual GP Reallocation, Patient Type Configuration, Manage Nominations, and Add Relationship. The bottom status bar shows: Active PAN, Peter (Mr), Born 13-Dec-1999 (23y), Gender Male, NHS No. Unknown. The bottom navigation bar includes: 1. Demographics 2. Additional 3. Online Services 4. Family / Relationship Links 5. Status History 6. Audit History.

On this page make sure to add the relationships e.g., mother, father, siblings. Make sure to double check if the person they are related to are a registered patient first before using the free text entry as it saves time and makes sure we can find the information if ever needed easier.



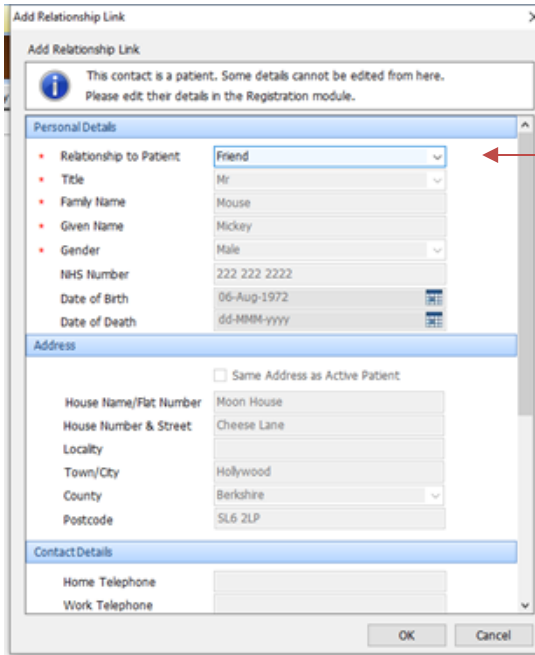
The screenshot shows the 'Add Relationship Link' dialog box. The patient information is: PAN, Peter (Mr), Born 13-Dec-1999 (23y), NHS No. Unknown. The dialog box has two radio button options: 'Add relationship link from registered patient' (selected) and 'Add relationship link from free text entry'. There are 'OK' and 'Cancel' buttons at the bottom.

Add relationship link from registered patient – To be used to link up the new patient with anyone they have provided in their registration form who is already registered with us. When you click this, it will take you to the find the pt page.

Add relationship link from Free Text entry – To be used to link up the new patient with anyone they have provided in their registration form who is not registered with us. **If a whole family is registering do this section for all of them AFTER you have put them all onto the system using the Link from Registered Patient.**

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

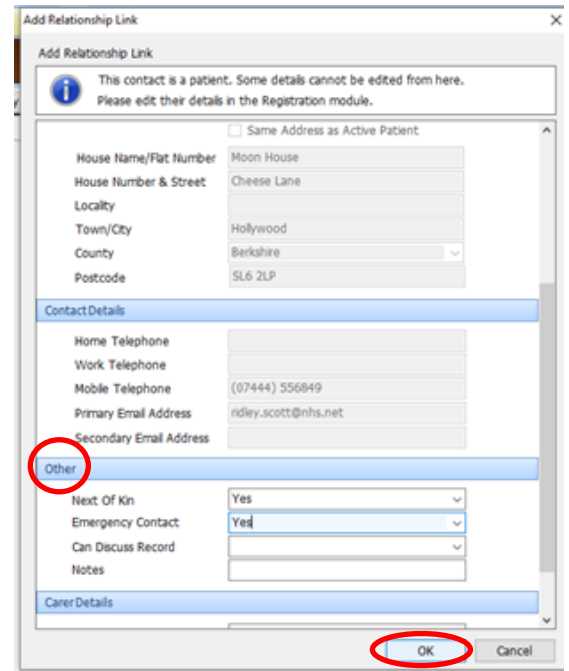
Add relationship link – Registered Patient (Anything in red is mandatory)



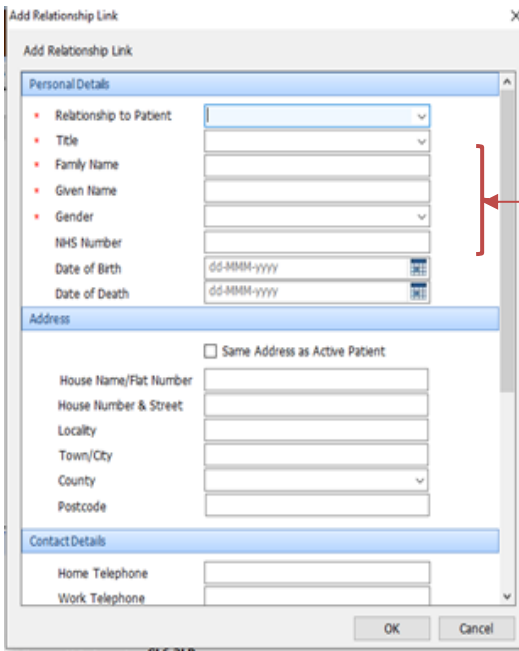
Fill out any mandatory information marked with the red asterisk. Make sure with relationship to patient you use the drop-down box.

Other: Use the registration form to find out if they are next of kin or an emergency contact. Use the drop-down selections to write yes or no. This information is needed.

When this is complete press OK.



Add relationship link – Free text Entry (Anything in red is mandatory)

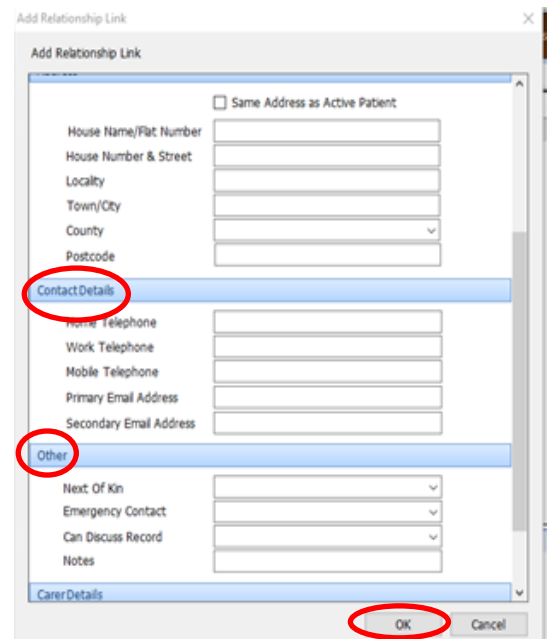


Fill out any mandatory information marked with the red asterisk. Make sure with relationship to patient, title, and gender you use the drop-down box.

Contact details: Make sure to add the contact details as these may be needed in an emergency.

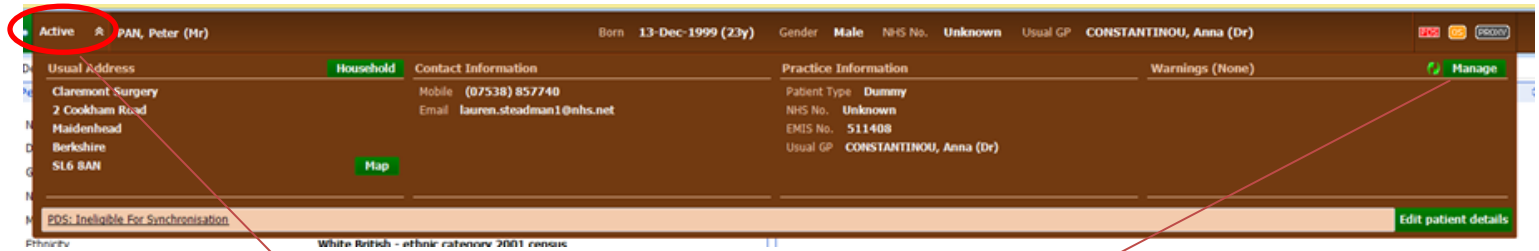
Other: Use the registration form to find out if they are next of kin or an emergency contact. Use the drop-down selections to write yes or no.

When this is complete press OK.

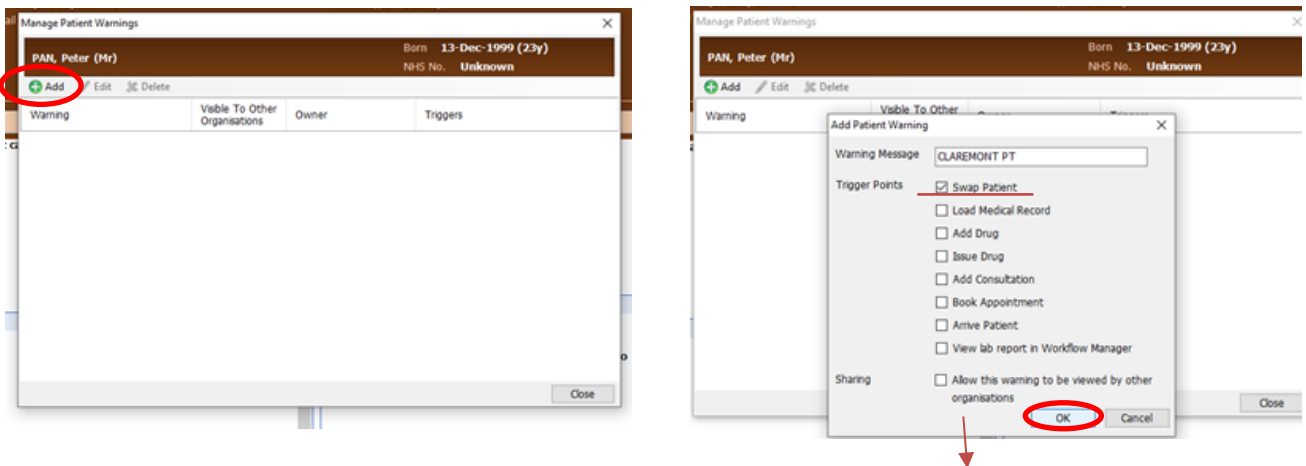


If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Patient Warnings:

Make sure to use the warnings selections to add whether the patient is a Claremont Patient or a Holyport Patient.



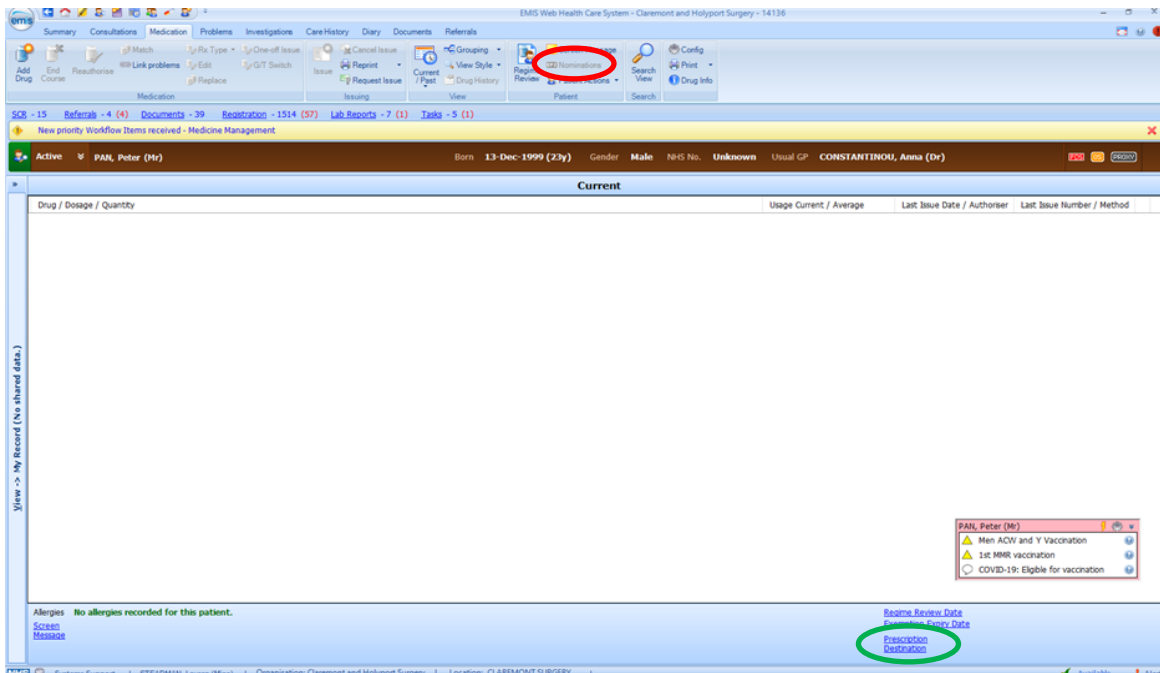
Click the **active** button to get the address bar down. Then click the **manage** button circles above. A box will come up as shown below:



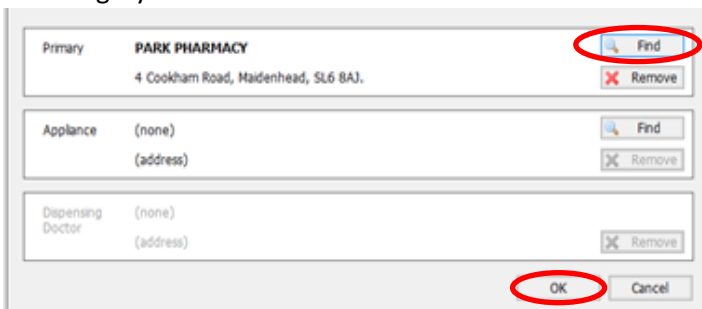
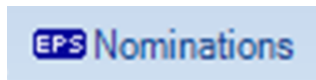
Click the **add** button to make sure you can add a warning and you'll have this box come up. Add your warning in this example it is CLAREMONT PT. Then only click onto the **Swap Patient** button. You do not need to select every option on this only the swap patient. Once you have completed this press the **OK** button and close the manage patient warnings box.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Pharmacy Nominations:

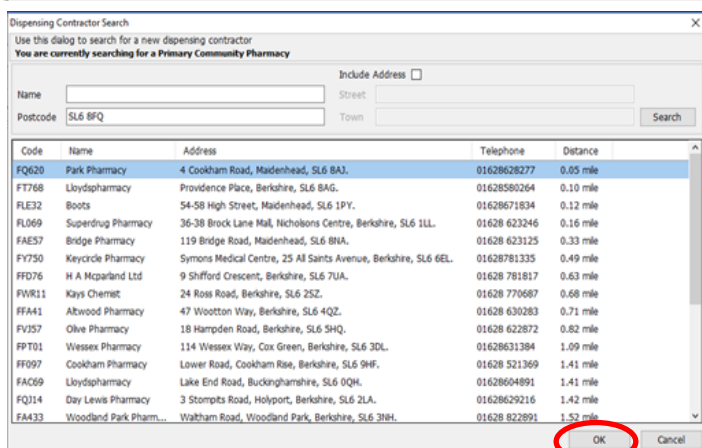
Make sure to use the Pharmacy Nomination that the patient as put into the registration form. **Please note Lloyds Pharmacy in Sainsburys is closing soon.**



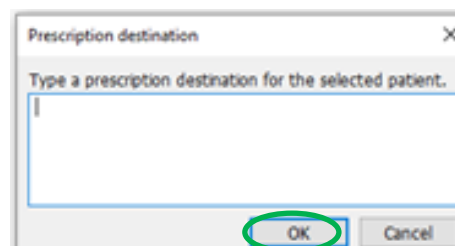
Go to the Medicine Management Page by clicking the Pill on your toolbar or by pressing the medication tab on the patient. This will take you to the page above. First you need to add their nominated pharmacy using the nominations button which looks like this. Some pts e.g new to country will have this button greyed out like Peter Pan.



When you have clicked the nominations button this pop up will come up. Press the find button to find the pharmacy they would like. The pharmacies will come up closest to the address given. Make sure to choose the one on the Registration form and then press OK on both pop ups to get back to the main medicine page.

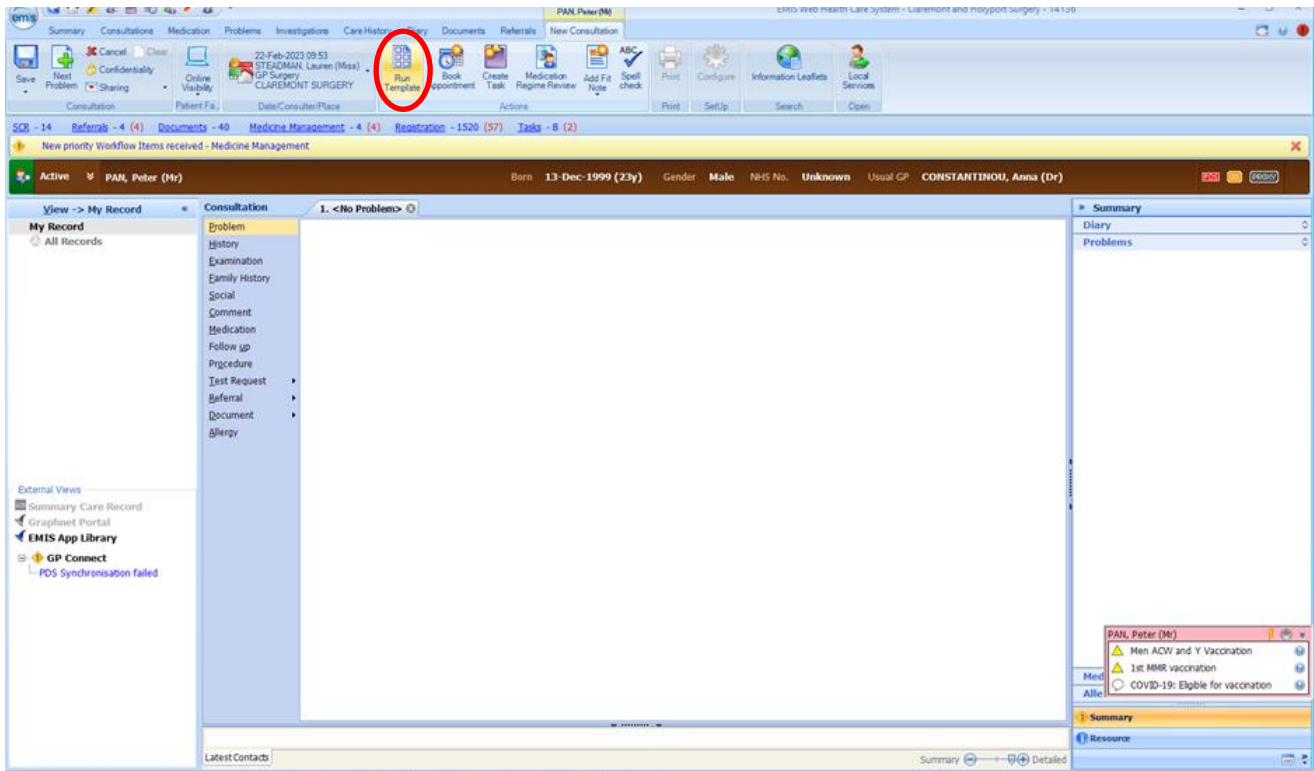


Prescription Destination: (Green Circle)
 You then need to add the Prescription destination by clicking the button circled in Green on the main medicine image. Type in the pharmacy e.g., PARK and press the OK button.

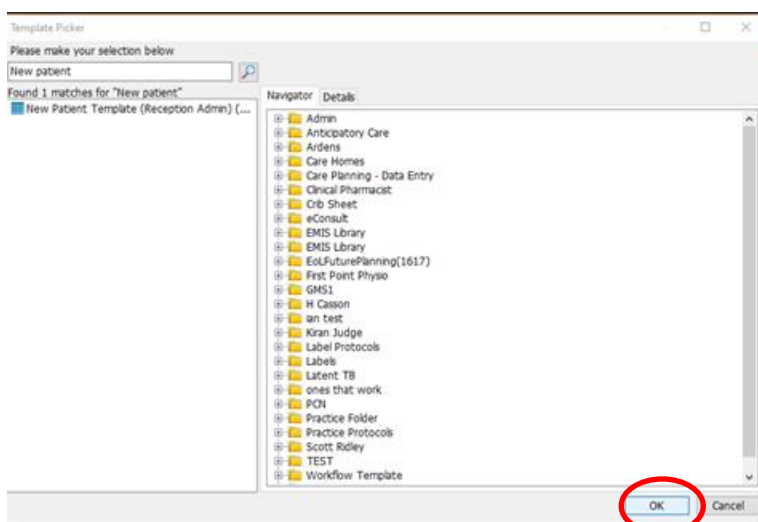


If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Lifestyle and Medical History Information:

We are no longer adding this information into the Care history (except smears) but instead creating a consultation with the new patient template from Ardens. Create a new consultation and it should look like this:



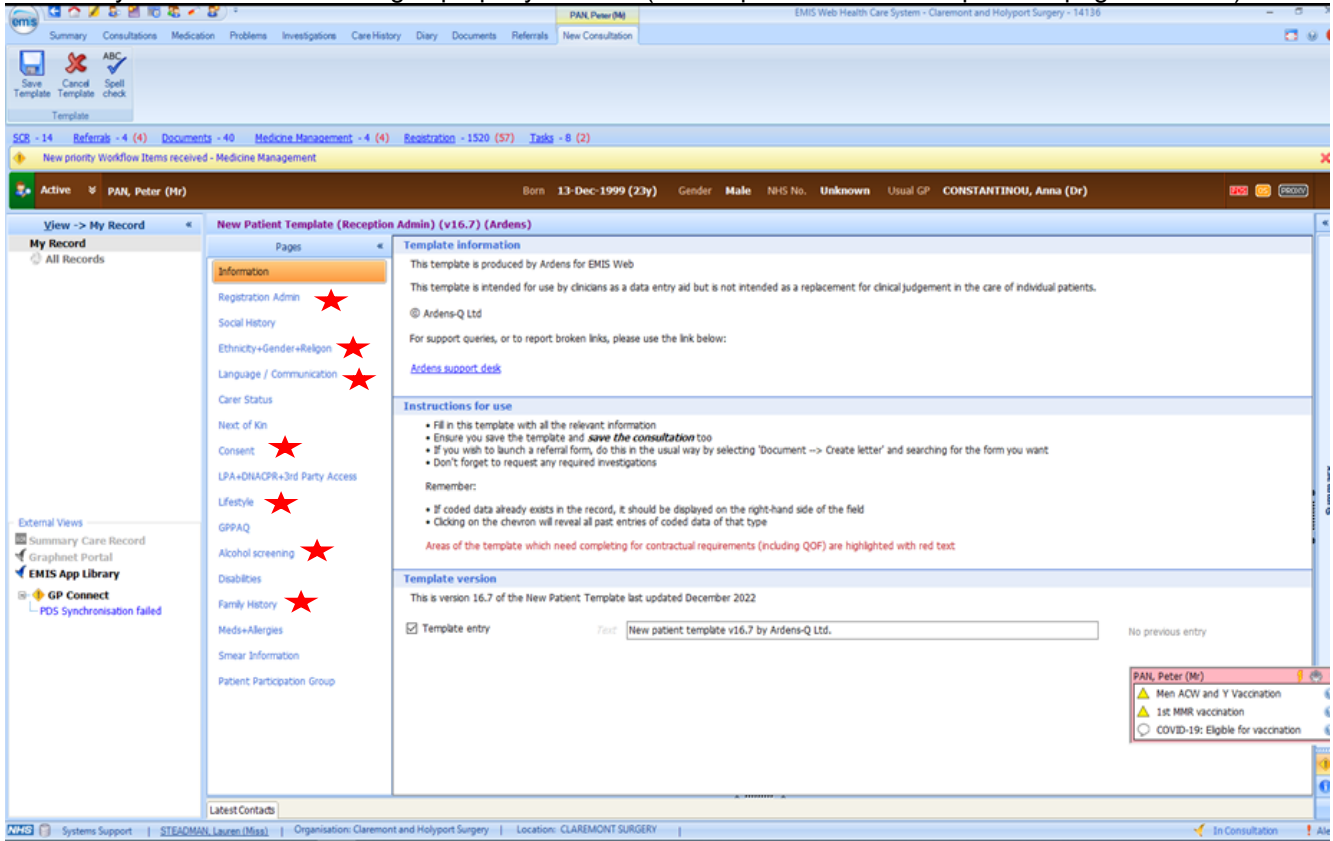
Press the Run Template button as circles above. This will then take you to this pop up shown below.



To search the new template type in new patient into the search bar and press enter. It will then come up with the match to the template you need. Click on the template and press OK.

Once you have clicked this it will come up with the template shown on the next page.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

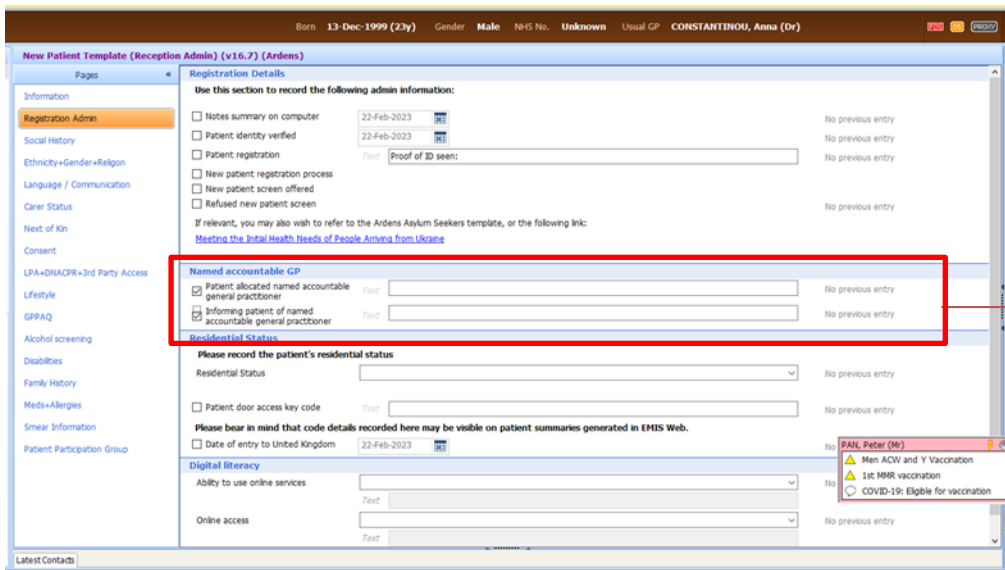


The only pages you will need on this is (star next to each page):

- Registration Admin
- Ethnicity + Gender + Religion
- Language and Communication (if interpreter is needed)
- Consent
- Lifestyle
- Alcohol Screening (if paper registration)
- Family History

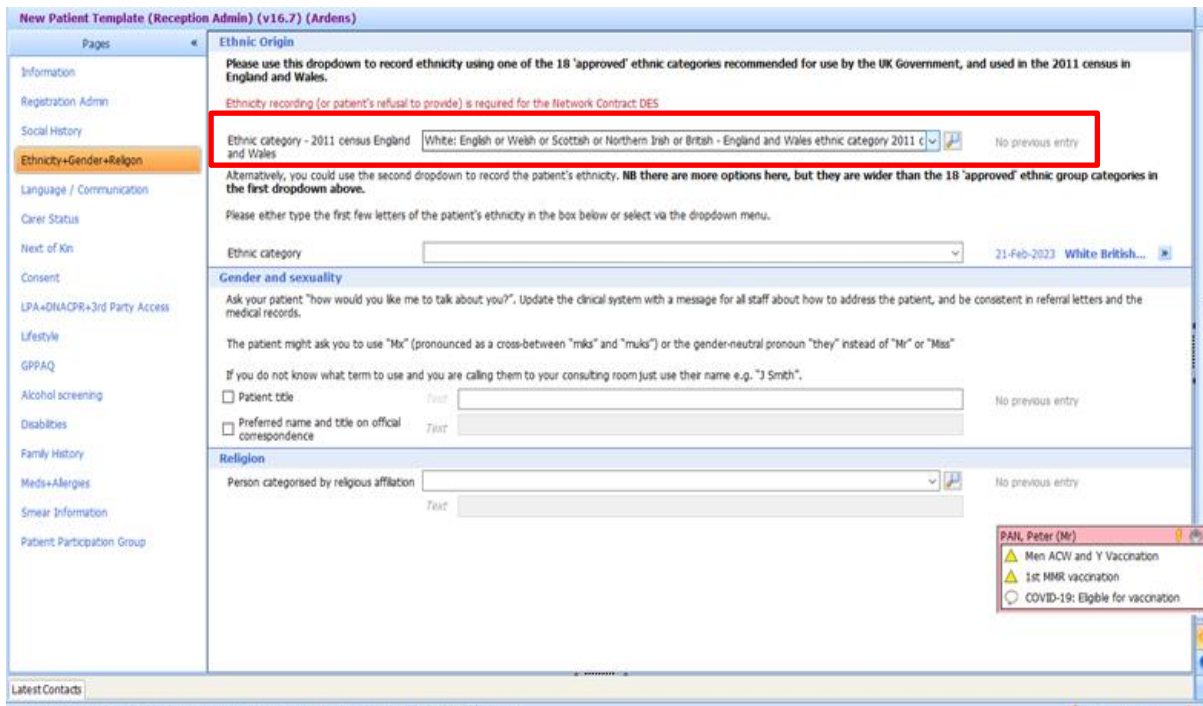
Smear Information – do not add to the template. IF NEEDED - Cervical Smears- go to care history (**when you have completed this template**) and press add code. Type in Cervical Cytology test. Add the date on the Registration form and press OK.

Registration Admin:



The only part of this page you need to fill in is the **named accountable GP** section. Press the tick boxes to show you have allocated and informed the Pt of their GP. **You will need to send the pt a text after completing this template to tell them who their GP is.**

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Ethnicity + Gender + Religion:



New Patient Template (Reception Admin) (v16.7) (Ardens)

Ethnic Origin

Please use this dropdown to record ethnicity using one of the 18 'approved' ethnic categories recommended for use by the UK Government, and used in the 2011 census in England and Wales.

Ethnicity recording (or patient's refusal to provide) is required for the Network Contract DES

Ethnic category - 2011 census England and Wales: No previous entry

Alternatively, you could use the second dropdown to record the patient's ethnicity. **NB there are more options here, but they are wider than the 18 'approved' ethnic group categories in the first dropdown above.**

Please either type the first few letters of the patient's ethnicity in the box below or select via the dropdown menu.

Ethnic category: 21-Feb-2023 White British...

Gender and sexuality

Ask your patient "how would you like me to talk about you?". Update the clinical system with a message for all staff about how to address the patient, and be consistent in referral letters and the medical records.

The patient might ask you to use "Mx" (pronounced as a cross-between "miks" and "muks") or the gender-neutral pronoun "they" instead of "Mr" or "Ms"

If you do not know what term to use and you are calling them to your consulting room just use their name e.g. "J Smith".

Patient title No previous entry

Preferred name and title on official correspondence

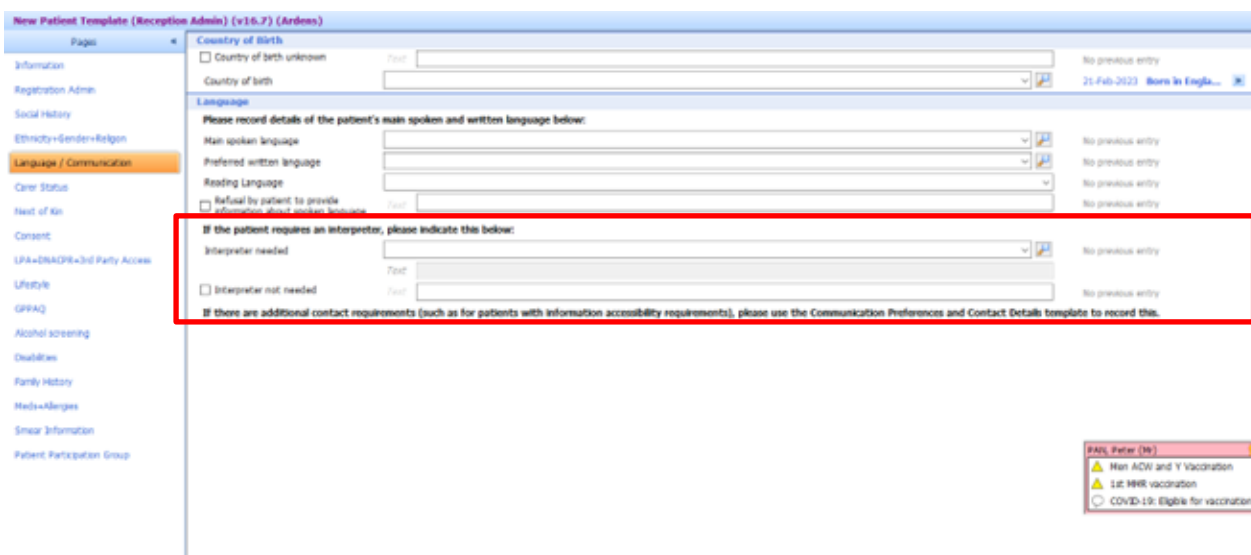
Religion

Person categorised by religious affiliation: No previous entry

Latest Contacts

For this section you only need to fill in the **Ethnicity Category – 2011 census England and Wales**. Use the drop-down selections to add the pts ethnicity as put down onto the registration form. If you cannot find the ethnicity on the drop-down selection, use the search (magnifying glass) like you would in the first part of the registration. Ethnicity is part of our QOF, so we need to make sure we have this information. This is the only part of this page you need to fill in so go to the next page **Language and communication** (if pt needs interpreter). If your patient does not need an interpreter go to page **Consent**.

Language and Communication: If pt needs an interpreter only.



New Patient Template (Reception Admin) (v16.7) (Ardens)

Country of Birth

Country of birth unknown No previous entry

Country of birth: 21-Feb-2023 Born in Engla...

Language

Please record details of the patient's main spoken and written language below:

Main spoken language: No previous entry

Preferred written language: No previous entry

Reading Language: No previous entry

Refusal by patient to provide information about spoken language No previous entry

If the patient requires an interpreter, please indicate this below:

Interpreter needed: No previous entry

Interpreter not needed No previous entry

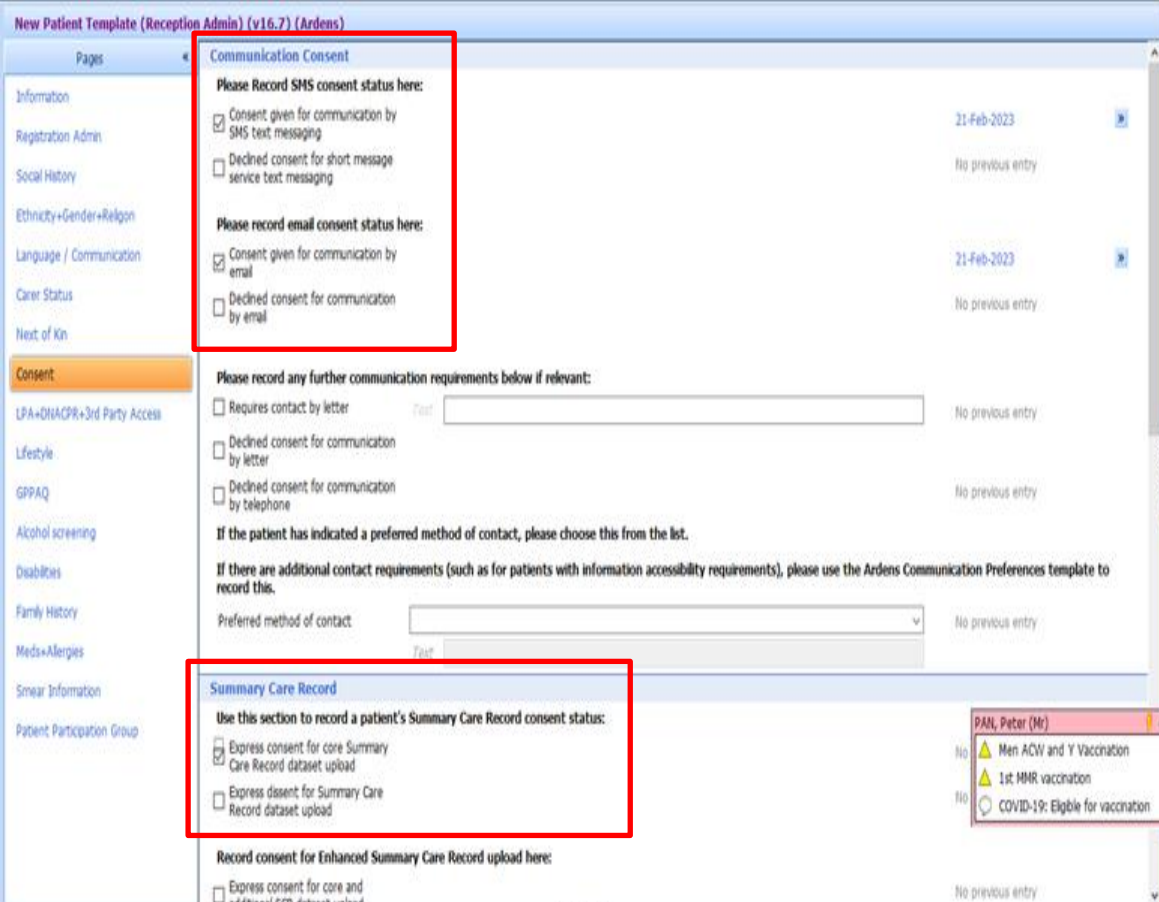
If there are additional contact requirements (such as for patients with information accessibility requirements), please use the Communication Preferences and Contact Details template to record this.

Latest Contacts

Only to be completed if the Patient needs an interpreter. Use the code from the drop-down selection **Interpreter needed**. This is necessary to ensure that the patient gets the double appointment they need to have an interpreter for their appointment. This will lead to less appointments being wasted than necessary. This is the only part of this page you need to fill in so go to the next page **Consent**.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Consent:



Communication Consent

Please Record SMS consent status here:

Consent given for communication by SMS text messaging 21-Feb-2023

Declined consent for short message service text messaging No previous entry

Please record email consent status here:

Consent given for communication by email 21-Feb-2023

Declined consent for communication by email No previous entry

Please record any further communication requirements below if relevant:

Requires contact by letter Text: No previous entry

Declined consent for communication by letter No previous entry

Declined consent for communication by telephone No previous entry

If the patient has indicated a preferred method of contact, please choose this from the list.

If there are additional contact requirements (such as for patients with information accessibility requirements), please use the Ardens Communication Preferences template to record this.

Preferred method of contact: No previous entry

Summary Care Record

Use this section to record a patient's Summary Care Record consent status:

Express consent for core Summary Care Record dataset upload

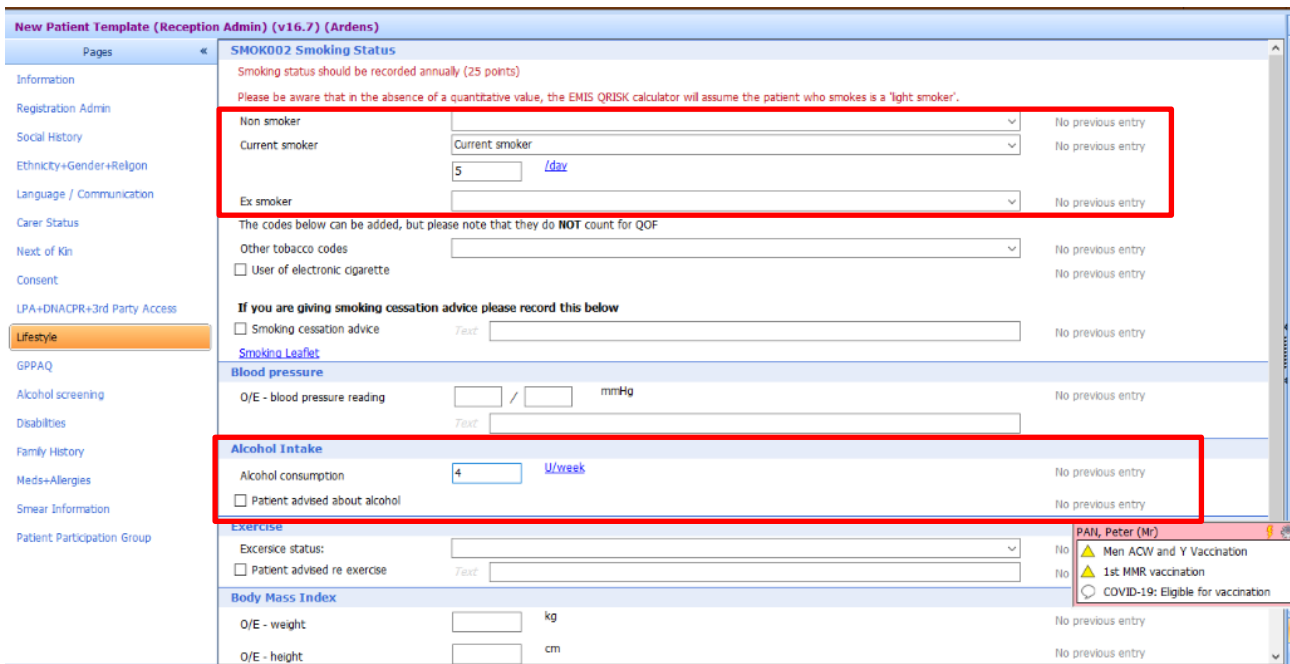
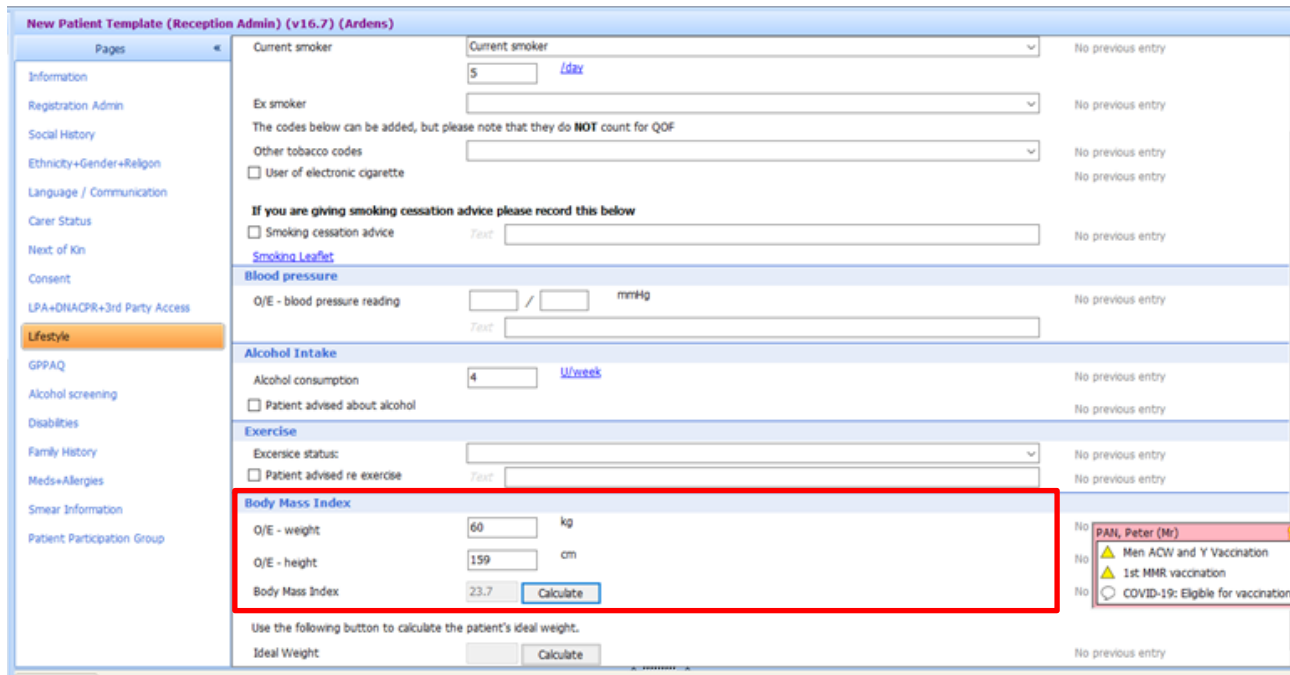
Express dissent for Summary Care Record dataset upload

Record consent for Enhanced Summary Care Record upload here:

Express consent for core and additional SCR dataset upload No previous entry

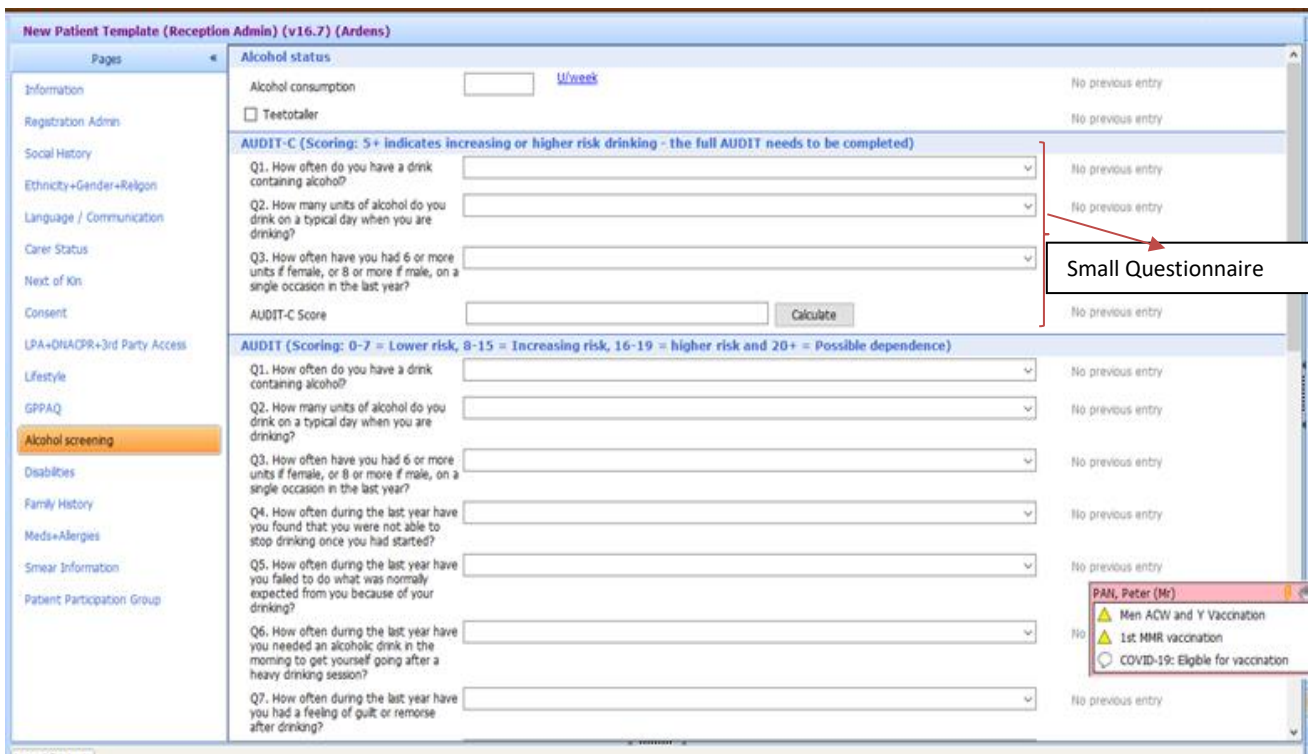
For this page you need to fill out the Consent for SMS, Email and Core Summary Records. You can do this by clicking the tick box on either consent or declined. **We can only do consent for the core summary records not the enhanced.** If the patient has declined Summary Care records make sure to put this down on this template. When you have completed these sections in the red boxes go to the next page **Lifestyle**.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Lifestyle:

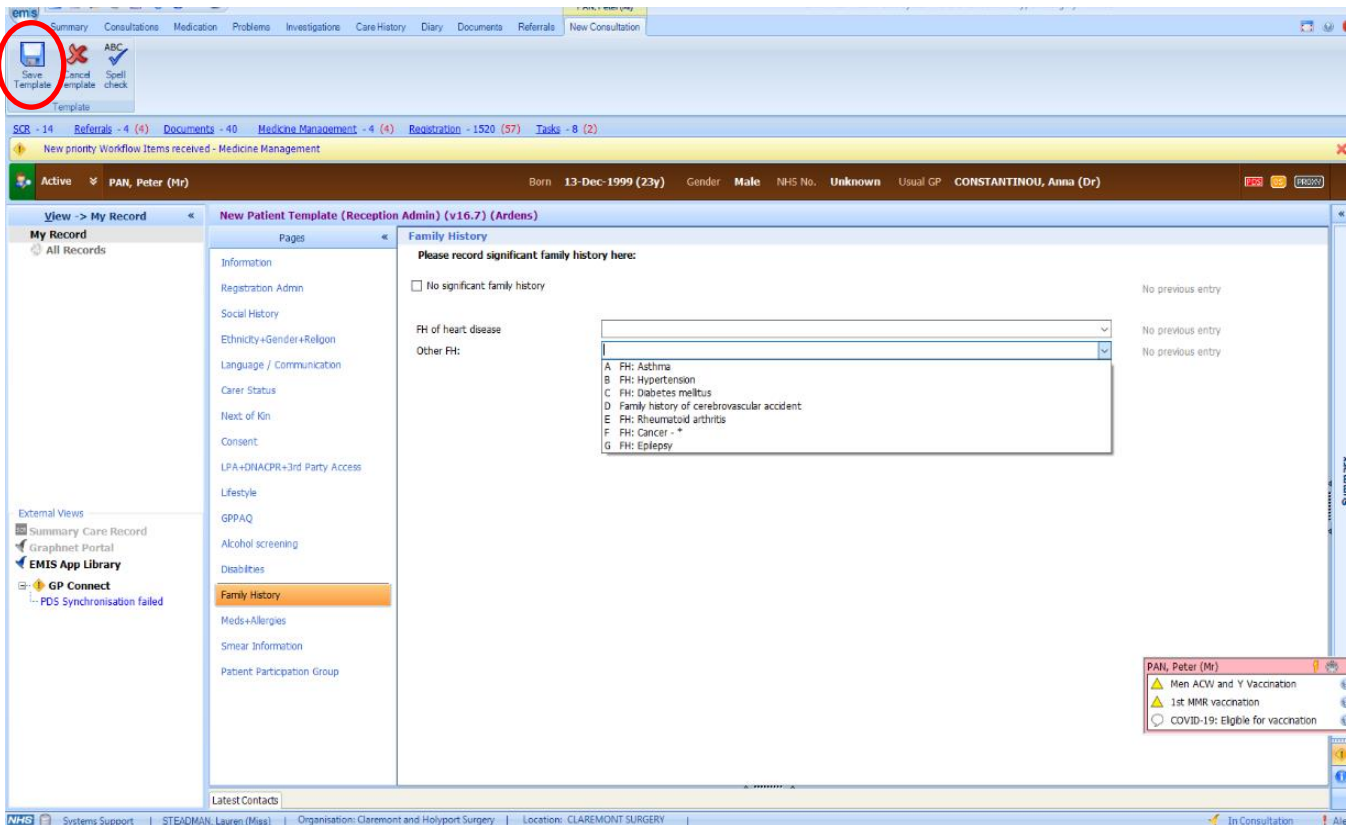
For the Lifestyle page add anything that the patient has put on the forms e.g., smoking (**Smoking codes: Non-Smoker – Never smoked tobacco, Smoker – Current Smoker, Ex-Smoker – Ex-Smoker**), weight, height into this section. If it has a drop-down box, make sure to use it. If the patient is a smoker put current smoker and the amount they smoke per day. **You do not need to fill out the smoking cessation as the text you will need to send (smokefreelife 2022) automatically codes it.** Smear information needs to be added to the care history as normal. For the online registrations, the form only has units per week and not the alcohol screening questionnaire so make sure to add this information in the boxes like shown above. When you have completed this page, you can go to the [alcohol screening page \(paper reg only\)](#) or to the [family history page](#).

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Alcohol Screening (Paper Registrations only):

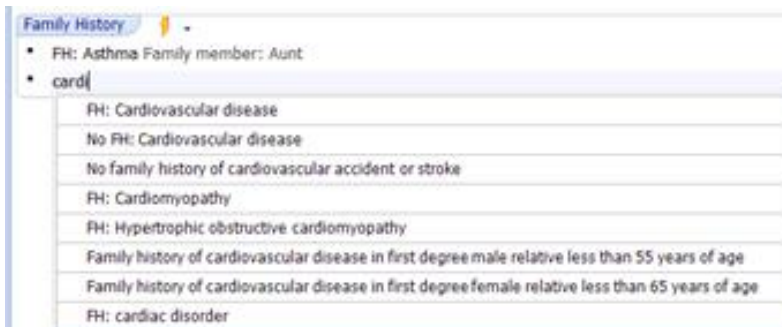


On the paper registrations it will have the alcohol questionnaire. If the patient has only filled out the small questionnaire, then use the drop-down selections to add the scores the patient has written down and then press the calculate button to calculate the Audit-C score automatically. If the patient does not drink alcohol, then tick the Teetotaler box. If the pt has done the large questionnaire you fill it out the same way but with page 6 of the paper registration form.
 Once you have completed this page go to the **Family History** Page.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Family History:



Using the information on the registration forms you can fill some of the family history you will usually find by using the drop-down selections. Any that are not on this list you can fill from the family history tab in the consultation after the template has been saved as shown below. If FH heart disease, do it the consultation after the template has been saved.



If the patient did not write any family history on the registration form use the tick box for 'No Significant Family History.'

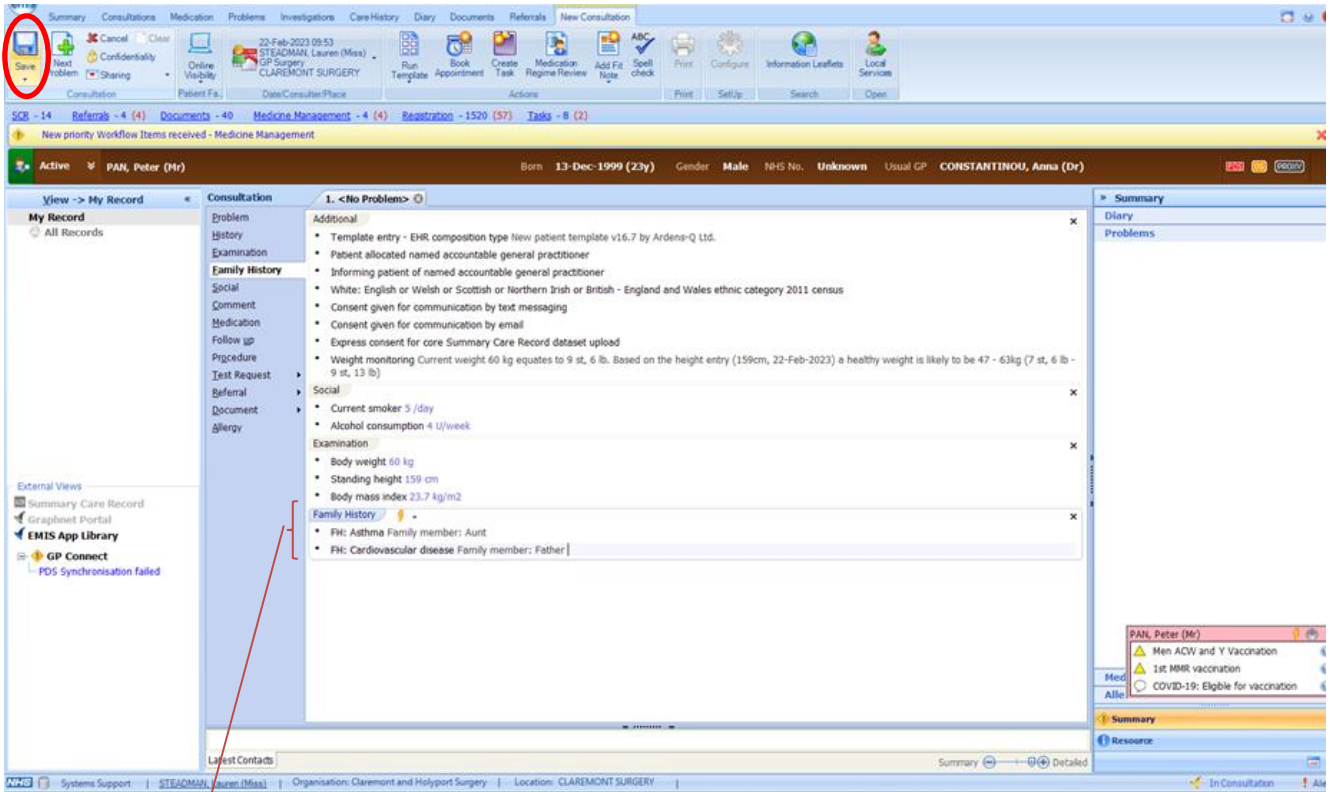
Codes:

- Diabetes = FH: diabetes mellitus
- Asthma = FH: Asthma
- High BP = FH: Hypertension
- Cancer = FH: Cancer
- Heart disease = FH: Cardiovascular Disease
- Stroke = Family History of Cerebrovascular accident

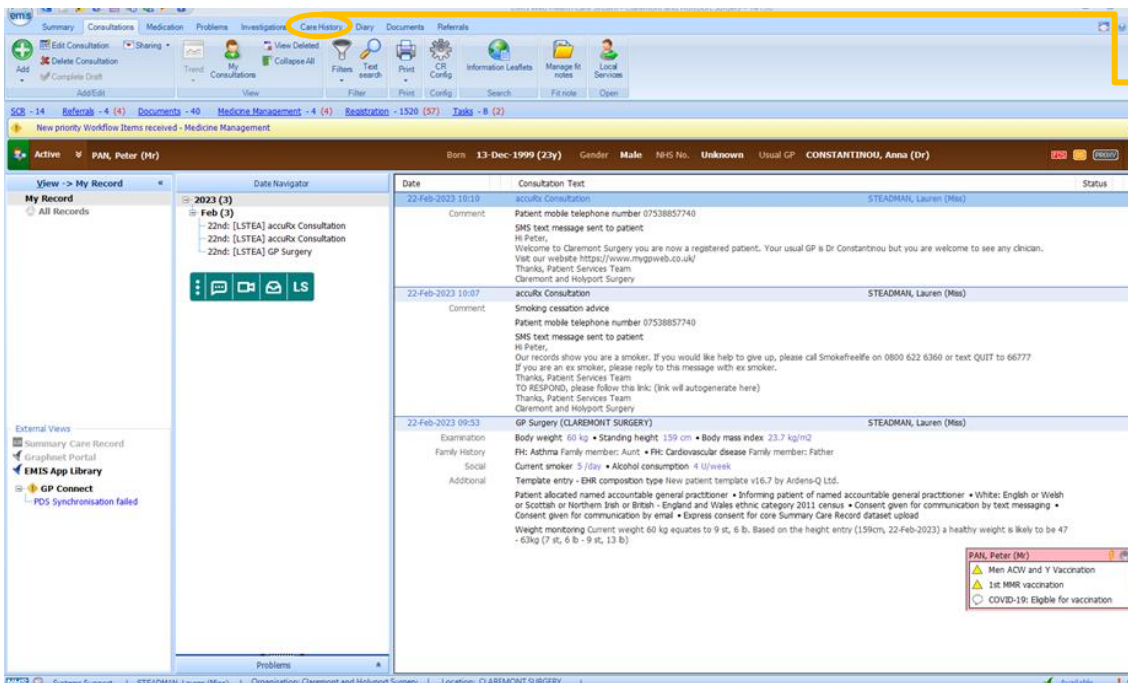
- Thyroid = FH: Thyroid
- Kidney = FH: Kidney Disorder
- Epilepsy = FH: Epilepsy
- Learning Difficulty = FH: learning disability

Once you have completed this section make sure to save the template by clicking the **save template** shown in the red circle. This will then go back to the main consultation page with everything you filled out as shown on the next page.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)



Add any **family history** you could not add before in the consultation before you save the consultation.
Once completed press the **save** button. Once you have saved the Pt's consultation tab should look like this:



IF NEEDED - Cervical Smears- go to care history and press add code. Type in Cervical Cytology test. Add the date on the Registration form and press OK.

Make sure the PDS is Blue (peter pan is a dummy pt hence red)
The final thing you need to do to fully complete the registration is to text the patient on AccruRX. Please follow the information on the next page to ensure the patient receives all the correct information.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)
Texting Pt to complete the Registration:

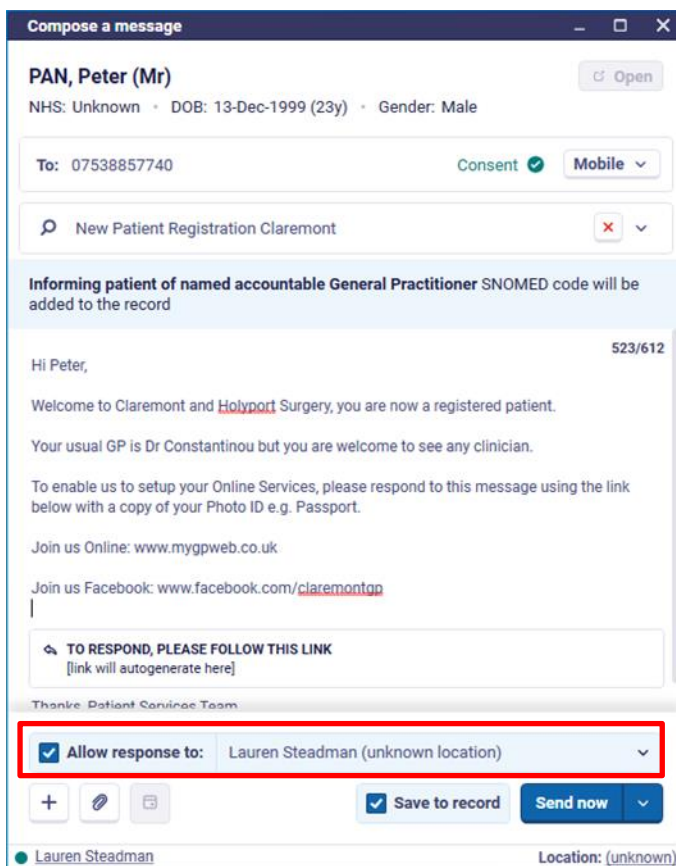
This is done to ensure the patient is informed of who their allocated GP is. This will now also be used to collect copies of immunisations (for under 16s) and Photo ID for online services (NHS App).

All patients will be sent either one of these two templates:

- New Registration Claremont – for Claremont
- New Registration Holyport – for Holyport

Created by your practice	
Registration Claremont	
 New Patient Registration Claremont	Preview
Registration Holyport	
 New Patient Registration Holyport	Preview

From March we will need photo ID for online services only to ensure the patient is the one receiving access to their electronic medical records



Compose a message

PAN, Peter (Mr) Open

NHS: Unknown · DOB: 13-Dec-1999 (23y) · Gender: Male

To: 07538857740 Consent Mobile

New Patient Registration Claremont

Informing patient of named accountable General Practitioner SNOMED code will be added to the record

Hi Peter, 523/612

Welcome to Claremont and Holyport Surgery, you are now a registered patient.

Your usual GP is Dr Constantinou but you are welcome to see any clinician.

To enable us to setup your Online Services, please respond to this message using the link below with a copy of your Photo ID e.g. Passport.

Join us Online: www.mygpweb.co.uk

Join us Facebook: www.facebook.com/claremontgp

TO RESPOND, PLEASE FOLLOW THIS LINK
 [link will autogenerate here]

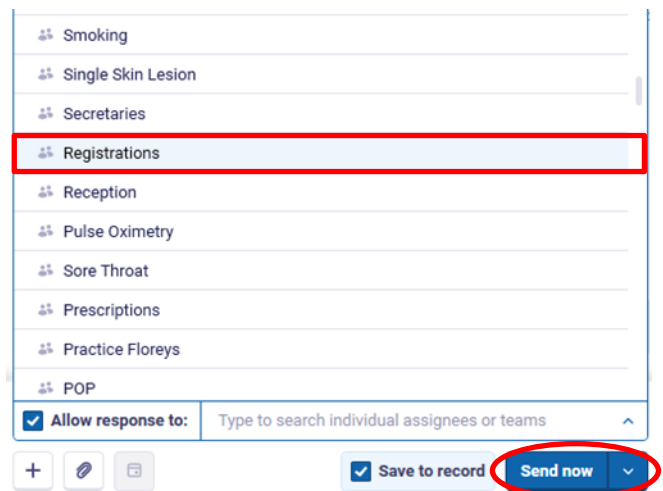
Thanks, Patient Services Team

Allow response to: Lauren Steadman (unknown location)

Save to record **Send now**

Lauren Steadman Location: (unknown)

Make sure to change who the response goes to. It needs to go to the **registrations** folder in the Teams Section of AccruRX. This will make sure that whoever is in the group can see the Pt's photo ID to add online services. **(Look at the Online Services Guide to add online services onto the Pt)**



- Smoking
- Single Skin Lesion
- Secretaries
- Registrations**
- Reception
- Pulse Oximetry
- Sore Throat
- Prescriptions
- Practice Floreys
- POP

Allow response to: Type to search individual assignees or teams

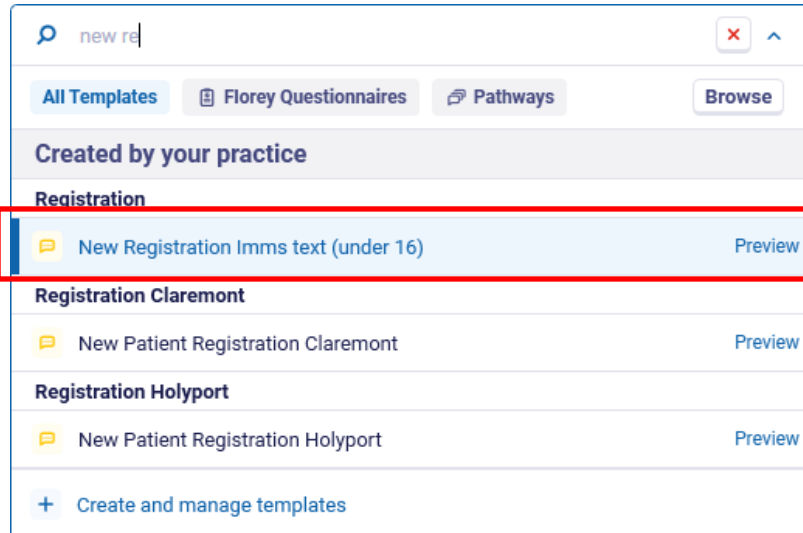
Save to record **Send now**

Once you have changed who the response goes to **send** the message to the Patient.
If the Patient is under 16 then follow the next page. If they are not, then the registration is complete.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

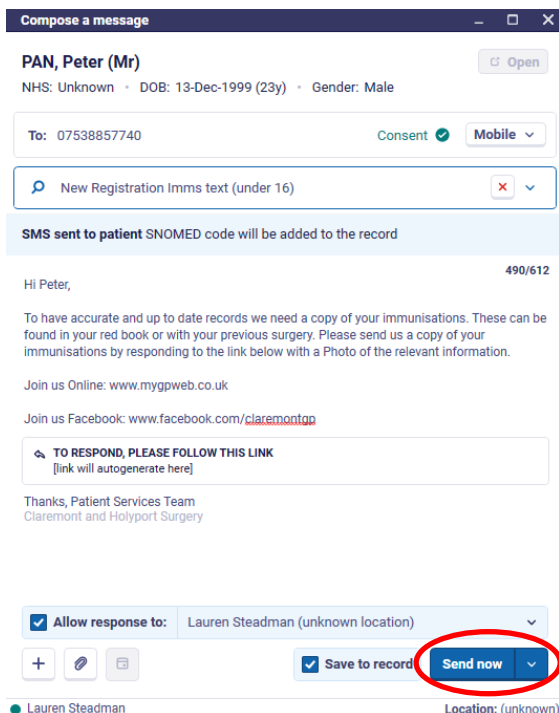
Under 16's:

Under 16's will need to be sent the **New Patient Registration Text** AND **New Registration Imms text (under 16)**

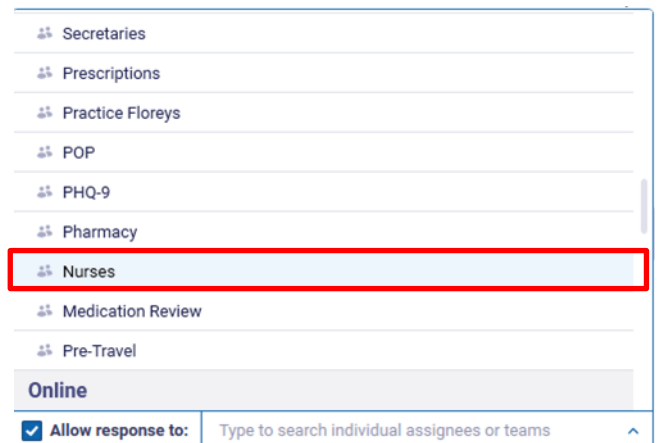


If you are following the guide, you should have sent the new patient registration text already and now will need to send the immunisation text sent.

The text will look like this:



Allow the response to the **nurses'** box on the Teams section. This will allow this information to be saved onto the notes and coded correctly. Send the text to the Pt.



Once this has been sent the registration is complete.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Common Mistakes:

Common Mistakes	Issues it can cause
Re-registering patients with the re-register button	Does not go through to SPINE so registration is not done correctly (On Spine not our Pt). Will need to be deducted and reregistered.
Making a pt temporary instead of permanent for a permanent patient	Cannot be changed to permanent until the temporary expires, cannot do referrals etc.
Not checking SPINE for the pt/not checking properly e.g., not writing DOB like this 01-01-2023, SPINE is fussy.	Can lead to duplication of NHS numbers so cannot get the pts full medical records easily.
Not using the drop-down selections when supposed to	Leads to amendments, pts not being registered correctly, in some cases needing to be deducted and re-registered
Practice Boundary not being used/not being used when pt changes address	Patients who are OOA being registered. OOA Pts will not be able to receive home visits etc
Royal Mail Postcode finder not being used on new and previous addresses (incorrect addresses, addresses written on wrong lines, postcodes wrong or not added, Drop-down box not used for county)	Registrations will not be added properly to SPINE (On Spine not our Pt), Registrations locked so cannot do any prescriptions may need to be deducted and re-registered if address is done incorrectly.
Families having addresses spelt wrong for each of them/not being linked correctly	Harder to find on the system, address may be incorrect (see issues for RM postcode finder not being used)
Names Spelt wrong	Will need ID and Proof of name to change. ID/ Proof does not need to be scanned on, only documented it has been seen in the notes.
DOB wrong	Will need ID and Proof of name to change. ID/ Proof does not need to be scanned on, only documented it has been seen in the notes.
Addresses being changed without evidence (after the patient has been registered)	Will need Proof to change and change of address form completed. Proof does not need to be scanned on only documented onto notes that it has been seen. COA form will be scanned onto notes.
UK number not added	Will not be able to contact Pt.
Wrong Registering GP	GP's getting more patients on their list than supposed to
Families not under same GP	Harder to find on the system/babies need checks with their GP so easier for both mum & baby to have the same.
Consent SMS + Email not added/added incorrectly	Pts may not want us to text/email goes against their wishes. Can lead to complaints etc.
GP Links page not being done	Does not go through to SPINE so registration is not done correctly (On Spine not our Pt). Will not get any records (paper or GP2GP) May need to be deducted and reregistered.

If you cannot see the images properly zoom in (Do not print let's save the planet 1 page at a time)

Wrong Presentation Type	Can lead to duplicate NHS numbers, no medical records, Pt's not registered properly on the spine so will need deducting and reregistering.
Previous GP address written in instead of Pt's Previous address	GP2GP not coming through, pts not going through correctly on SPINE
Pt's NOK/Emergency Contact not added	We have no one to get hold of in an emergency
Pt not allocated/informed of GP (no text to pt to inform GP)	Pts must be informed of who their usual GP is as per guidelines
Not texting parents to send link of immunisation history of pt	QOF not being done as we do not know pt's vaccination history.
Pts main language/if interpreter is needed not added	Leads to waste of appointments as pt will need a double appointment to speak to clinicians. If we do not know this info, we cannot sort out a double appointment.
No text with link so pt can respond with copy of ID	Pt will not be able to get online services (see online Services Guide)
When looking for babies on the Spine trace and portal writing name on reg form	Babies will be on the spine as Baby, (mothers last name) and all have NHS numbers if name is different on reg form look this way first.
Babies not registered same GP as parent, usually mum	Need checks together, should have the same GP.
Photocopying Identity documents	It is against the law to scan/photocopy identity documents including Passports, Driving licence. We can not ask for ID at the point of registration only online services. Please look at the online services guide for more information.