

REGISTER A NEW PATIENT

You should only register a new patient record if you have tried all possible search options and these have failed to find your patient.

Refer to the **MPI > Search for a Patient** reference guide

Enter your search criteria into the **Search Criteria** box

In this box you can enter:

An **NHS number** (e.g. 4653249807)

A **Date of Birth**. You must use forward slashes, and you must use the full year (e.g. 21/4/1973)

The patient's **name**.

You can enter partial names. Separate the surname and name with a comma (e.g. "Roberts, Kimberley" or "rob, kim")

Then click the magnifying glass to run the search

The **Find Patient** window opens showing you the results of your search

To register a new patient click on the **Register** button

This button will not be active until you have run a search!

The blank **Patient Details** screen opens

Note: any search terms you have used will be entered into the relevant fields.

Mandatory fields are highlighted in bold

Complete all fields following the guidance below:

Complete the **Name Details** section:

The NHS number will remain unverified until the Trust auto-match this with national records.


Forename: type details

Other Given Name: ask & record the patient's middle name, specifically for patient's with common surnames.

Surname: type details

Name at Birth: type details

Title: click the arrow and select from the list

Unverified NHS Number: click the  and type the NHS number in the Number field

Complete the **Personal Details** section:

Date of Birth: type in (slashes or full year are not necessary but you must enter at least 6 digits, e.g. 021165); **Age** will auto-populate

Gender: may auto-populate from the title, or, click the arrow and select from the list

Civil Status: click the arrow and select from the list

Ethnic Group: click the arrow and select from the list

Patient, or immediate family, has served in the British Armed Forces?: click the arrow and select from the list
Refer to the **Update the Patient's British Armed Forces Status** guide for guidelines & adding the relevant **Alert**.

Nationality: click the arrow and select from the list

Religion: click the arrow and select from the list

Have you been living in UK for the last 12 Months?: click the arrow and select from the list.

If you select **No**, you will be asked to supply a completed **MPI Overseas Visitor Pre-Attendance** form and contact the **overseas visitors' team**; extension numbers are supplied in the message.

Complete the **Address Details** section:

The following MPI reference guides provide more detailed instructions for recording the address:

- Address - Add or Update the Current Address
- Address - Add or End a Temporary Address
- Address - Add, End or Update a Correspondence Address
- Address - Manually Type the Address (includes overseas addresses)

Click on the **magnifying glass** to the right of the **Address Search** box

Select the correct **Address type**:

Main – the patient's permanent address – Letters go here unless superceded by a Temporary or Correspondence Address.

Temporary - the patient's temporary address - Letters go here when active, unless superceded by a Correspondence Address.

Correspondence – only to be used when all CareFlow generated letters need to be sent to an address which isn't their Main, and/or Temporary address.

The **Address Details** window opens

Type the postcode, or street and town/partial postcode, into **Line 1** and click **Find**

See the **MPI > Use the Quick Address Function** guide for more ways of searching for a UK address.

The **Search Results** window opens

Click the **+** to display the individual address details

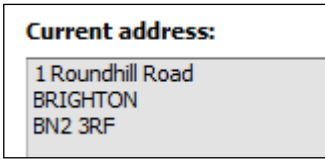
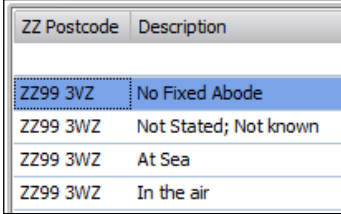
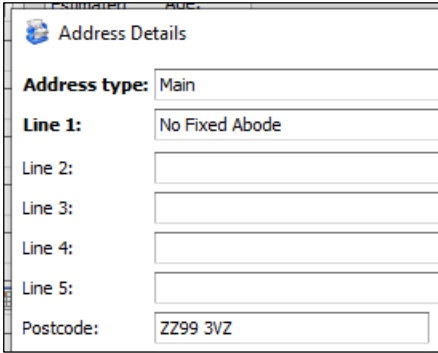
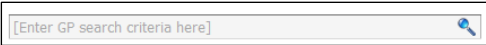
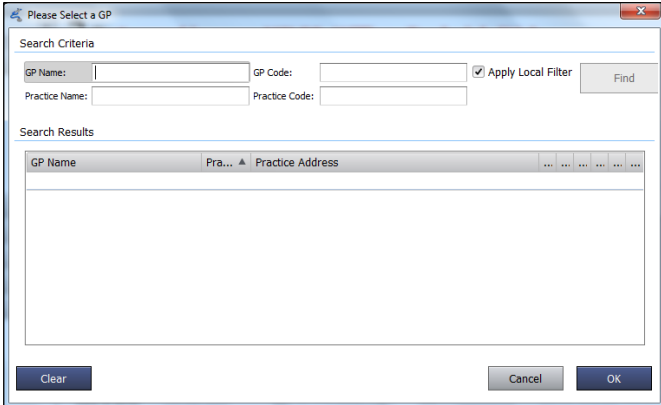
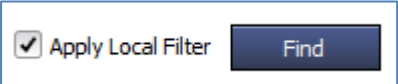
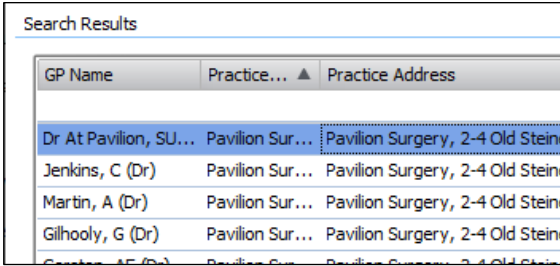
Select the relevant address. Click **Save**

Note:

The **Valid from date** defaults to today. If recording retrospectively, ensure this date is prior to the start of the episode of care.

The address loads in the **Address Details** window

Note: the address has not been saved yet! It will only be saved when you click Save in the Personal Details screen

Click on Save	<p>The address displays in the Current Address field</p> 
<p>No Fixed Abode or address details unknown:</p> <p>Click the ZZ Codes button on the Address Details screen</p>	
<p>Select the appropriate option and Save the Address Details</p> <p>Say Yes to save the unverified address</p> <p>Unverified address details are highlighted in pink:</p> <p>Current address:</p> <p>[This address needs to be verified; please update the address] No Fixed Abode ZZ99 3VZ</p>	
Complete the GP Details section:	
<p>Click on the magnifying glass to the right of the Search for a GP box</p> 	<p>The Please Select a GP window opens</p> 
<p>Type the start of <i>one</i> of the following:</p> <ul style="list-style-type: none"> GP surname Practice Name first line of the Practice Address <p>in the appropriate field then click Find</p>  <p>Note: if you leave the tick in Apply Local Filter it will only search local GPs/practices</p>	<p>The records that match your search criteria display in the Search Results section of the screen</p> 

You can also use the % wildcard to search any part of the name or address

GP

Please Select a GP

Search Criteria

GP Name: %wood

Practice Name:

Practice Address:

Search Results

GP Name	Practice Name
At Woodhill, SURG...	Woodhill S
Brockwood Medical...	Brockwood
Cameron-Wood, R...	Carisbrood
Churchwood Medic...	Churchwood
Dawood, NRB (Dr)	Woodingde
Ellwood, JL (Dr)	Ball Tree

Practice Name

GP Name:

Practice Name: %health

Practice Address:

Search Results

GP Name	Practice Name	Practice Address
Bhh Morley, STREE...	Arch Health Cic	Morley Street, Bright
Worthley, T (Dr)	Arch Health Cic	Morley Street, Bright
Sargeant, C (Dr)	Arch Health Cic	Morley Street, Bright
Lewin, NC (Dr)	Arch Health Cic	Morley Street, Bright
Mahmood, I (Dr)	Ashdown For ...	Ashdown Forest Hea
Fyfe, ALA (Dr)	Ashdown	Ashdown Forest Health Ce

Practice Address

Practice Address: %albion

Search Results

GP Name	Practice Name	Practice Address	En...
Albion, STREET (Dr)	Albion Street...	Albion Street Surgery, 9 Albi...	
Sikdar, MK (Dr)	Albion Street...	Albion Street Surgery, 9 Albi...	
Howlett, SC (Dr)	Albion Street...	Albion Street Surgery, 9 Albi...	
McGowan, DJ (Dr)	Park Surgery	The Park Surgery, Albion W...	
Okonkwo, U (Dr)	Park Surgery	The Park Surgery, Albion W...	
Park, SURGERY (Dr)	Park Surgery	The Park Surgery, Albion Way, H	

You can further refine your results, using the **filter row**

Typing %m as shown on the right, limits the results to addresses with this letter in it somewhere.

Filter Row, to further refine, if required

Practice Address: %preston

Search Results

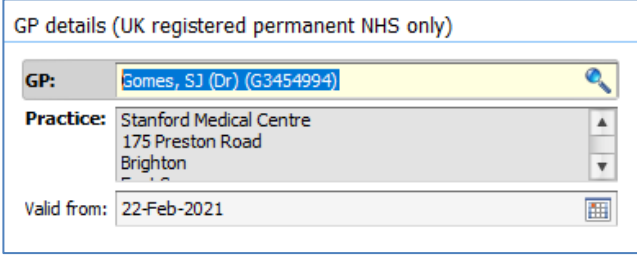
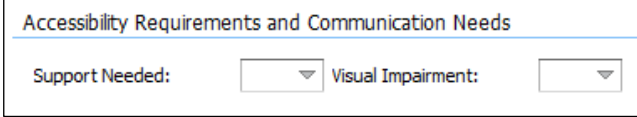
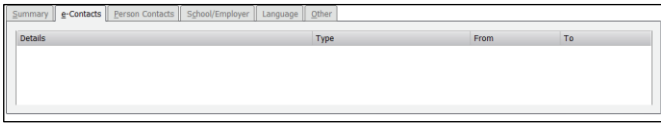
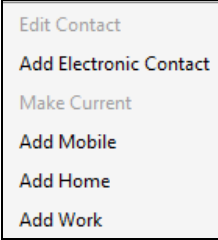
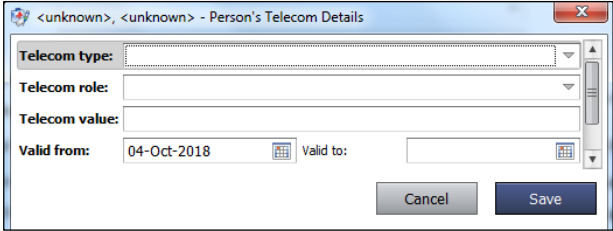
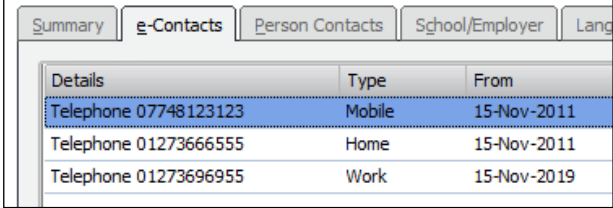
GP Name	Practice Name	Practice Address	En...	GP Co...
%m				
EADIE, EJ (Dr)	Stanford Me...	Stanford Medical Centre, 17...		G334...
Gomes, SJ (Dr)	Stanford Me...	Stanford Medical Centre, 17...		G345
Pooled, LIST (Dr)	Stanford Me...	Stanford Medical Centre, 175 Preston Roa		

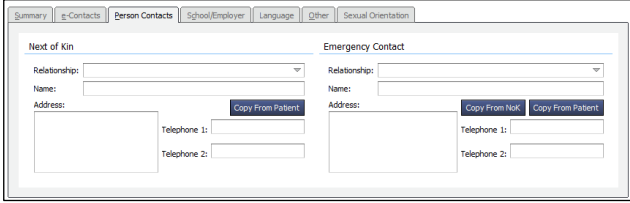
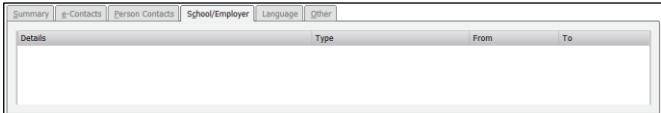
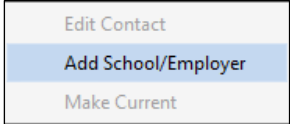
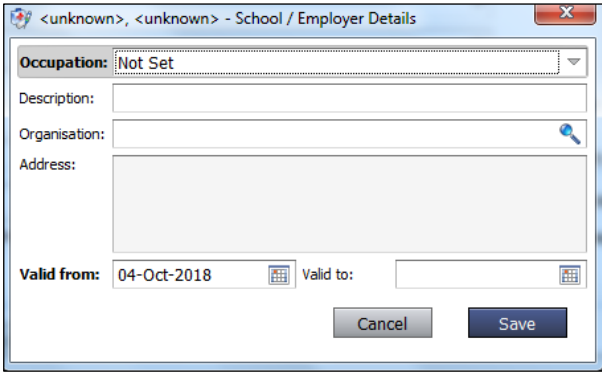
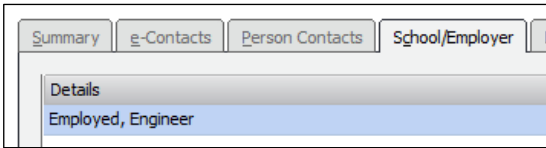
If there are no NHS GP Details:

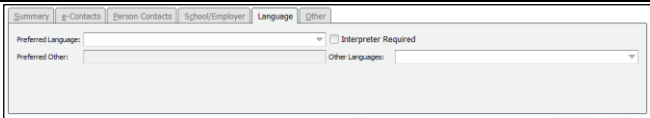
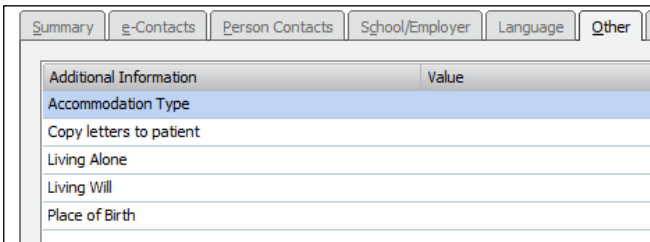
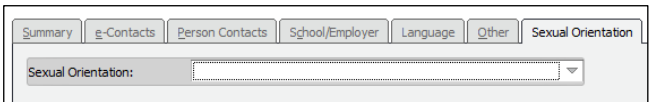
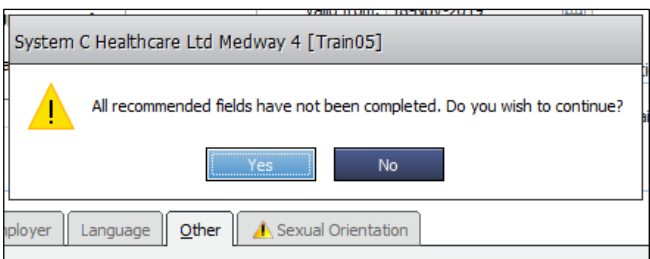
- GP / Practice not known: type **V81999** in the **Practice Code** field, or **unknown** in the **GP Name** field
- GP /Practice not applicable (e.g. overseas visitor): type **V81998** in the **Practice Code** field, or **not app** in the **GP Name** field

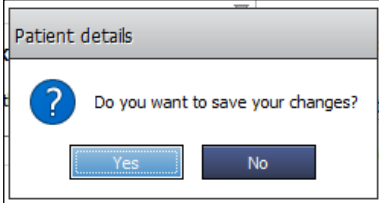
Click on the relevant GP and click **OK**

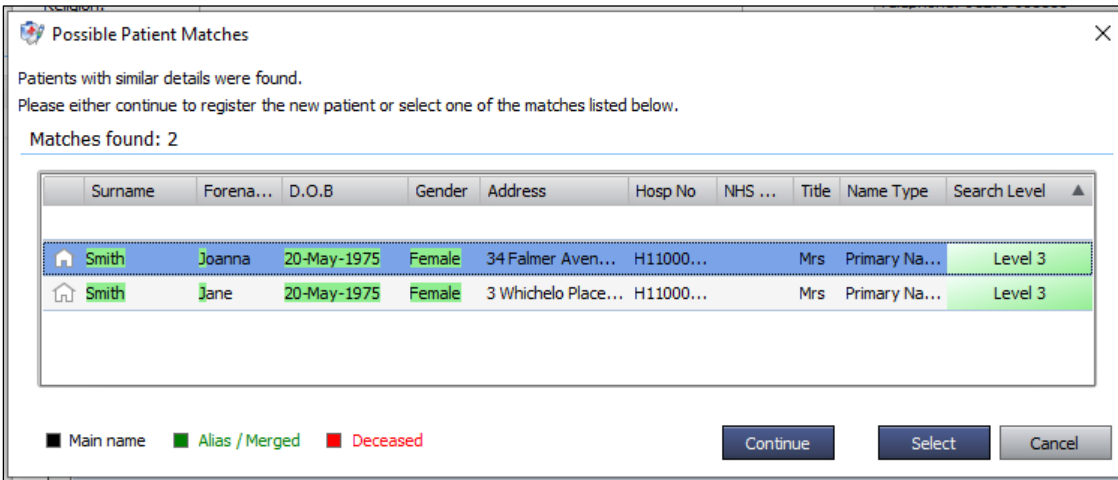
You return to the **Patient Details** screen. The GP shows in the **GP Details** section

<p>Note: The Valid from date defaults to today. If recording retrospectively, ensure this date is prior to the start of the episode of care</p>	
<p>Complete the Support Needed and Visual Impairment fields as appropriate</p>	
<p>Complete the Contact Details section: The Summary tab displays information from the other tabs. You cannot enter/update information here.</p>	
<p>Click on the e-Contacts tab to add phone numbers and email addresses etc.</p>	<p>The e-Contacts section displays:</p> 
<p>Right-click in the white space and select the relevant option</p> 	<p>The Person's Telecom Details window displays</p> 
<p>Complete the details:</p> <p>Note: The Telecom Type and Telecom Role will be pre-filled if you have selected the Add Mobile, Add Home or Add Work options</p>	<p>Telecom Type: click the arrow and select from the list (e.g. email / Telephone) Telecom Role: click the arrow and select from the list (e.g. email / mobile / Temporary number) Telecom Value: type details – DO NOT put any spaces in telephone numbers (e.g. 01273606505 / 07748606505) Consent: tick if we have consent to use the details</p>
<p>Click Save</p>	<p>The new items display in the e-Contacts:</p> 
<p>Click on the Person Contacts tab to add Next of Kin and/or Emergency Contact,</p>	<p>The Person Contacts section displays:</p>

	
<p>Complete the details:</p> <p>Note: depending on your screen resolution, you may need to use the scroll bar to see all the fields</p>	<p>Relationship: click the arrow and select from the list</p> <p>Name: type details</p> <p>Address: if the same as the patient click the Copy from Patient button. If different, type details.</p> <p>Telephone: type details</p> <p>CARE: If you use the Copy from Patient button it will pull through all phone numbers from the patient including their mobile phone number!</p> <p>Make sure you change or delete these as required</p>
<p>Click on the School/Employer tab to add an occupation or School/College details ,</p>	<p>The School/Employer section displays:</p> 
<p>Right-click in the white space and select Add School/Employer</p> 	<p>The School/Employer details window displays:</p> 
<p>Complete the details:</p>	<p>Occupation: click the arrow and select from the list</p> <p>Description: type the occupation</p> <p>Organisation: use this to search for schools/universities, click the magnifying glass to open the search screen</p>
<p>Click Save</p>	<p>The item displays in the School/Employer tab</p> 
<p>Click the Language tab to record the patient's preferred language or that an interpreter is required,</p>	<p>The Language section displays:</p>

	
Complete the details as required	<p>Preferred Language: click the arrow and select from the list</p> <p>Preferred Other: mandatory if Other is selected in the previous field – type the language</p> <p>Other Languages: click the arrow and tick the boxes for any other relevant languages, spoken or sign.</p>
Click on the Other tab to record other details as shown	<p>The Other section displays:</p> 
Complete the details as required	<p>Value: Either type the details or select Yes/No depending on the field</p> <p>Comment: Type a comment</p>
Click on the Sexual Orientation tab	<p>The Sexual Orientation section displays</p> 
Click the arrow and select from the list	<p>Whilst this field is not mandatory, you will get the following warning message if you save the new record without completing it:</p>  <p>Select Yes to continue with the save, or No to record the sexual orientation details</p>
When you have completed all the relevant fields, click Save on the Patient Details screen	<p>The following message displays:</p>

	
Click the Yes button	<p>WARNING</p> <p>If there are existing patient records, which have the same:</p> <ul style="list-style-type: none"> • Surname, Forename or first initial and • Gender and • Date, or year, of birth, <p>the following Possible Patient Matches screen displays:</p>



Possible Patient Matches

Patients with similar details were found.
Please either continue to register the new patient or select one of the matches listed below.

Matches found: 2

	Surname	Forena...	D.O.B	Gender	Address	Hosp No	NHS ...	Title	Name Type	Search Level
	Smith	Joanna	20-May-1975	Female	34 Falmer Aven...	H11000...		Mrs	Primary Na...	Level 3
	Smith	Jane	20-May-1975	Female	3 Whichelo Place...	H11000...		Mrs	Primary Na...	Level 3

☐ Main name
 ☒ Alias / Merged
 ☐ Deceased

Continue Select Cancel

The details that match are highlighted in green – **check these patients carefully**

Use the Four Match Rule:

To match 2 records you must have:

- four demographic details which are identical
(e.g. first or sur-name; DoB; address; postcode; registered GP practice; personal phone number; email address), OR
- you must be able to “reasonably” explain any differences
(E.g. name change due to marriage; moved address)

For more information click the link if viewing this guide on-screen: [Patient Identification Guidance](#) or go to the **info-net** and enter **patient identification guidance** in the Search box.
The guide is shown under **Assets**

You can also click on the **House** icon next to the surname to open the patient’s **Home** page and view their activity and other information to help identify if this is the same patient.

If one of the patients listed is **the same person** as the one you are registering:

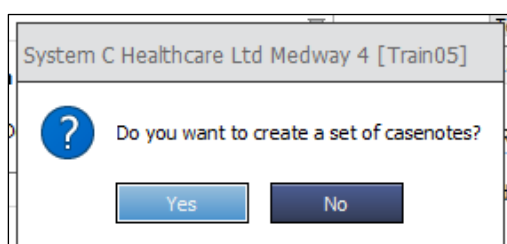
- click the matching record to highlight it
- click the **Select** button.

The patient details screen changes to show the **existing patient's** details – you may need to update the details for this existing patient if they have changed.

***Care:** You **must be sure** that they are the **same patient**. If necessary, **Cancel** out of the registration process to make further checks or ask advice from a supervisor or colleague.*

If **none** of the possible matches are the patient you are registering – click the **Continue** button to create the new record.

You may see the message asking if you wish to create a set of Casenotes:



Usually, click **No**

This is normally done by Medical Records, although some staff may create Temporary notes.

The patient record has been created.

The **Patient Details** screen may close but the patient details will be showing in **the Patient Banner** – this will depend on which module you were in when you searched for the patient.

A **Trust ID** number has been allocated and is shown in the **Patient Banner**

