

# Extended Access Training Guides

## PDS Trace and Reconciliation

### Support

Please email [mbpcc.extendedaccess@nhs.net](mailto:mbpcc.extendedaccess@nhs.net)

### Introduction

It is important to ensure that the patient is either traced or reconciled with PDS or it will not be possible to use other spine services such as EPS.

### PDS trace to register a new patient

This process should be familiar to you. The main difference now is that the trace searches PDS rather than the EMIS Master Patient Index to find patients. Click the Patient Trace wand on the quick access bar.

As before you can search on just NHS number, or by surname, gender and date of birth. Enter the information you have and click Find.

Patient Trace

Patient Trace helps you locate patients. Enter the patient's details to start tracing.

Trace Criteria

Family Name \*

Gender \*

Date Of Birth \* dd-MMM-yyyy

Given Name

Postcode

NHS Number

[Use DOB range](#)

Local Patients

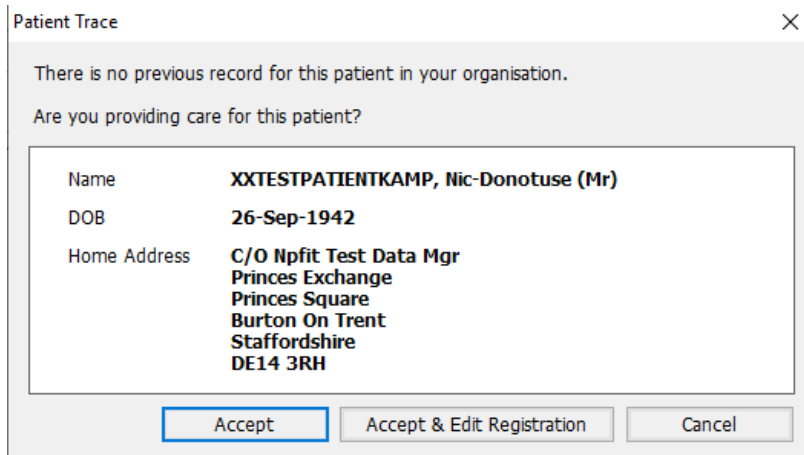
PDS Patients

Name / Address	Gender	Date of Birth / NHS Number	Status
<b>XXTESTPATIENTKAMP, Nic-Donotuse (Mr)</b> C/O Npfit Test Data Mgr, Princes Exchange, Princes Square, Burton On Trent, Staffordshire, DE14 3RH	Male	26-Sep-1942 999 012 3268	

Can't find the patient you are looking for? [Continue to Create New Patient](#)

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Select the correct patient from the results list then click Select Patient. You will receive a confirmation box, click Accept.



Patient Trace

There is no previous record for this patient in your organisation.

Are you providing care for this patient?

Name	XXTESTPATIENTKAMP, Nic-Donotuse (Mr)
DOB	26-Sep-1942
Home Address	C/O Npfit Test Data Mgr Princes Exchange Princes Square Burton On Trent Staffordshire DE14 3RH

Accept Accept & Edit Registration Cancel

The patient will be registered onto the system and loaded into the patient bar.

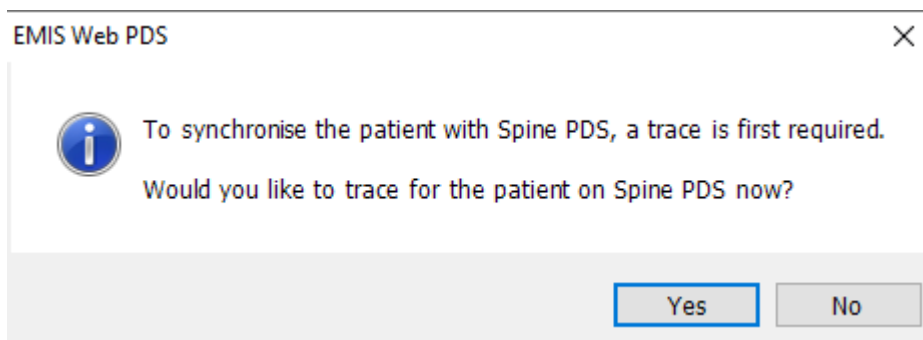
### PDS reconciliation

For patients that are already registered, it is necessary to associate them with PDS, or carry out a PDS reconciliation if they are already associated. Load the patient and enter any part of their care record. At the right hand side of the patient bar you see the PDS indicator. If it is blue then the patient is associated with PDS and there are no discrepancies. If the indicator is red then you need to take action to deal with discrepancies between PDS and the local EMIS system.



Gender Male NHS No. 999 001 3446 PDS

Click on the red PDS indicator. If the patient is not yet associated with PDS, you will be prompted to first trace the patient.



EMIS Web PDS

To synchronise the patient with Spine PDS, a trace is first required.

Would you like to trace for the patient on Spine PDS now?

Yes No

Click Yes. The Patient Trace screen will appear, already completed with the patient's details. Click Find.



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Patient Trace ×

A trace is required to locate the patient on Spine PDS before this patient's details can be synchronised.

**Trace Criteria**

Family Name \*  Gender \*  Date Of Birth \*

Given Name  Postcode  NHS Number  [Use DOB range](#)

**PDS Patients**

Name / Address	Gender	Date of Birth / NHS Number	Status
<b>XXTESTPATIENTABNC, Ebs-Donotuse (Mr)</b> The Information Centre, 1 Trevelyan Square, Leeds, West Yorkshire, LS1 6AE	Male	10-May-2000 999 001 3446	

There should be just one result in the list as this is based on NHS number. Highlight the patient and click Couple to Selected Patient.

You will now be presented with the PDS reconciliation box. Please note the screenshot below is for a dummy patient so the instructions may differ from the picture.

The left side shows the local record and the right side shows the PDS details.

For patient name, age and sex, check details with the patient.

Address, contact and practice details are likely to be most up to date on PDS rather than the local record so choose the right hand side, or check with the patient if they are present.



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PDS patient differences

Differences in patient details were found between the NHS Spine record and your Organisation's record.  
**Please select the correct details before continuing to couple the patient.**

Patient Name, Age, Sex		
	Local Record	NHS PDS Spine
Title	Mr	Mr
Family Name	Xxtestpatientabnc	Xxtestpatientabnc
Given Name	Ebs-Donotuse	Ebs-Donotuse
Sex	Male	Male
Date of Birth	10-May-2000	10-May-2000
NHS Number	999 001 3446	999 001 3446
Detailed Record Sharing	Express Consent	Express Consent

Addresses		
Home	Local Record	NHS PDS Spine
Home Address	<input type="radio"/> Test Address Delauneys Road Manchester M8 5RB	<input type="radio"/> The Information Centre 1 Trevelyan Square Leeds LS1 6AE

Contact Details		
	Local Record	NHS PDS Spine
Home Telephone	(01325)	(01325)
Mobile Telephone	<input type="radio"/> (blank)	<input type="radio"/> (07790) [red minus]
Email Address	<input type="radio"/> (blank)	<input type="radio"/> [red minus] @gmail.com

Practice Details		
	Local Record	NHS PDS Spine
Registered Practice	<input type="radio"/> Parkview Medical Centr P84645	<input checked="" type="radio"/> The Windermere & Bow A82046

OK Cancel

Once you have selected which details to use for each discrepancy, click OK. The PDS indicator should now turn blue.

