



Extended Access Training Guides

PDS Trace and Reconciliation

Support

Please email 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 X

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

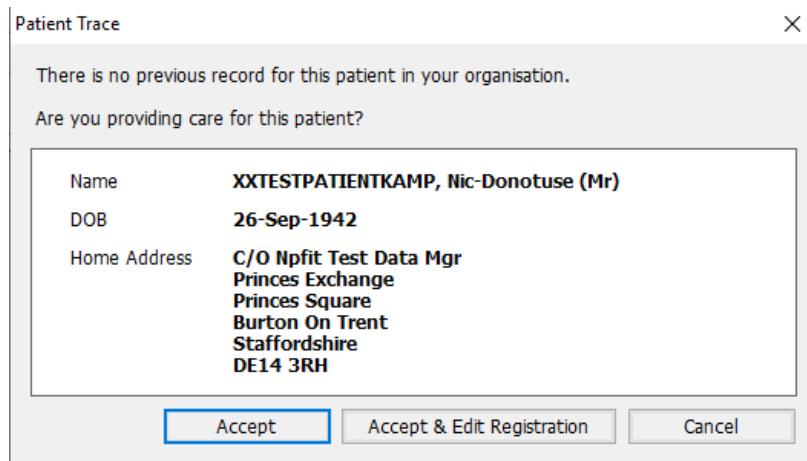
Trace Criteria					
Family Name	*	Gender	*	Date Of Birth	*
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="dd-MMM-yyyy"/>
<input type="text"/>		<input type="text"/>		<input type="text"/>	<input type="button" value="Find"/>
Given Name	<input type="text"/>	Postcode	<input type="text"/>	NHS Number	<input type="text"/> 999 012 3268 <input type="button" value="Use DOB range"/>
Local Patients		PDS Patients			
Name / Address		Gender	Date of Birth / NHS Number	Status	
XXTESTPATIENTKAMP, Nic-Donotuse (Mr) C/O Npfit Test Data Mgr, Princes Exchange, 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.



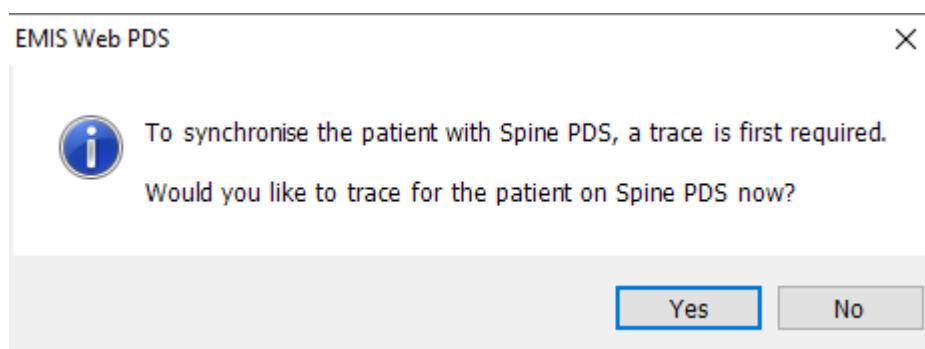
The patient will be registered onto the system and loaded into the patient bar.

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.



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



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



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Patient Trace X

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

Trace Criteria				
Family Name *	Xxtestpatientabnc	Gender *	Male	Date Of Birth *
Given Name *		Postcode *		NHS Number * 999 001 3446 Use DOB range

PDS Patients

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

Couple to Selected Patient Cancel

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
Family Name		Xxtestpatientabnc
Given Name		Ebs-Donotuse
Sex		Male
Date of Birth		10-May-2000
NHS Number		999 001 3446
Detailed Record Sharing		Express Consent
Addresses		
Home	Local Record	NHS PDS Spine
Home Address	<input type="radio"/> Test Address Delauney's 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)
Mobile Telephone	<input type="radio"/> (blank)	<input type="radio"/> (07790)
Email Address	<input type="radio"/> (blank)	<input type="radio"/> @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.

