

## Extended Access Training Guides

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

### Registration Management

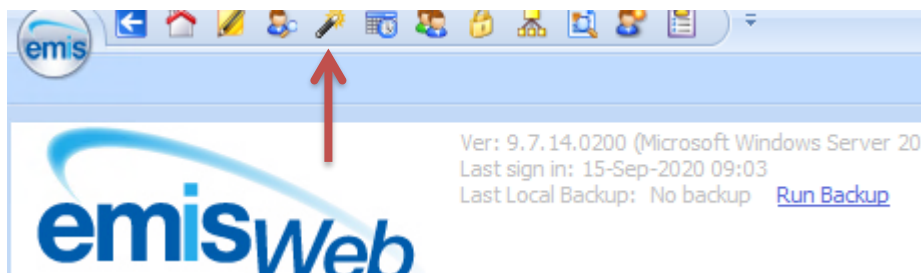
#### Introduction

As the usual mode of operation is remote consultation, it is not generally necessary to register patients onto the MBPCC EMIS system. All information necessary for a clinician to carry out a consultation is stored in the appointment booking which controls launching an instance of the registered practice EMIS system.

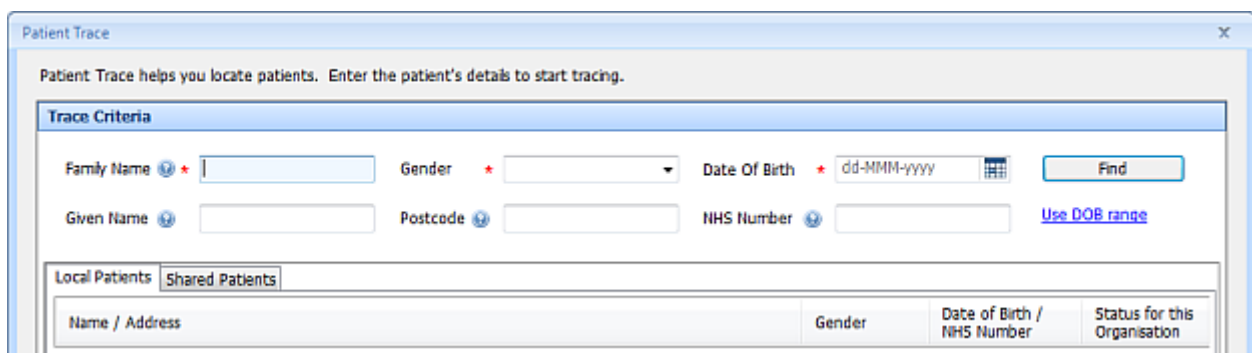
However, there is some functionality that will only work from within the MBPCC EMIS system which will require a patient to be registered. This will affect any user who needs to send a cross-organisational task or create a pathology test request.

#### Tracing (registering) a patient

Click the Patient Trace (wand icon) on the quick access toolbar.



You will be presented with the Patient Trace dialogue box. If you have the NHS number you only need to enter this, otherwise complete the three boxes that have a red asterisk. Click Find once you have entered the necessary information.



The screenshot shows the Patient Trace dialogue box. It has a title bar that says "Patient Trace". Below the title bar, there is a message: "Patient Trace helps you locate patients. Enter the patient's details to start tracing." The main area is divided into two sections: "Trace Criteria" and "Local Patients".

The "Trace Criteria" section contains the following fields:

- Family Name (with a red asterisk) and Gender (with a red asterisk) - both are required fields.
- Date Of Birth (with a red asterisk) - required field, with a date picker icon.
- Given Name (with a blue asterisk) - optional field.
- Postcode (with a blue asterisk) - optional field.
- NHS Number (with a blue asterisk) - optional field.

There is a "Find" button to the right of the Date Of Birth field. Below the "Find" button, there is a link that says "Use DOB range".

The "Local Patients" section has two tabs: "Local Patients" and "Shared Patients". Below the tabs, there is a table with the following columns:

Name / Address	Gender	Date of Birth / NHS Number	Status for this Organisation

You will be presented with a list of patients that match your criteria. This first searches the MBPCC database, then uses the EMIS Master Patient Index database to identify matching patients at practices with active record sharing. You will not normally get as many results as the screenshot

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below which is using a dummy patient for training purposes. Ensure you pick the one that is registered at the correct GP/Organisation. You can do this by double clicking on the patient or selecting it and clicking Select Patient.

Patient Trace

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

**Trace Criteria**

Family Name \* Editestpatient Gender \* Male Date Of Birth \* 12-Mar-1972 Find

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

Local Patients Shared Patients

Name / Address	Gender	Date of Birth / NHS Number	GP / Organisation	Status
<b>EDITESTPATIENT, Eight</b> 5 Any Street, Dummyville, EX2 1AA	Male	12-Mar-1972 999 999 9530	SIVAKUMAR, Subbuchettiar (Dr) BAY MEDICAL GROUP	
<b>EDITESTPATIENT, Eight (Mr)</b> 5 Any Street, Dummyville, EX2 1AA	Male	12-Mar-1972 Unknown		
<b>EDITESTPATIENT, Eight</b>	Male	12-Mar-1972 999 999 9530		
<b>EDITESTPATIENT, Eight (Mr)</b> 5 Any Street, Dummyville, EX2 1AA	Male	12-Mar-1972 999 999 9530		
<b>EDITESTPATIENT, Eight (Mr)</b> Extended Access Test, 2 Queen Square, Lancaster	Male	12-Mar-1972 999 999 9530	BATH, Laura Ellen (Dr) QUEEN SQUARE SURGERY	
<b>EDITESTPATIENT, Eight (Mr)</b>	Male	12-Mar-1972 999 999 9530		
<b>EDITESTPATIENT, Eight (Mr)</b> Hexagon House, Pynes Hill, Rydon Lane, Exeter, Devon, EX2 5SE	Male	12-Mar-1972 999 999 9530		

You will be shown a box asking you to confirm you want to register the patient to the Federation. This does not deregister them from their normal practice or mean their paper records will be moved!

The details should all be correct so click Accept.

Patient Trace

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

Are you providing care for this patient?

Name **EDITESTPATIENT, Eight**

DOB **12-Mar-1972**

Home Address **5 Any Street  
Dummyville  
EX2 1AA**

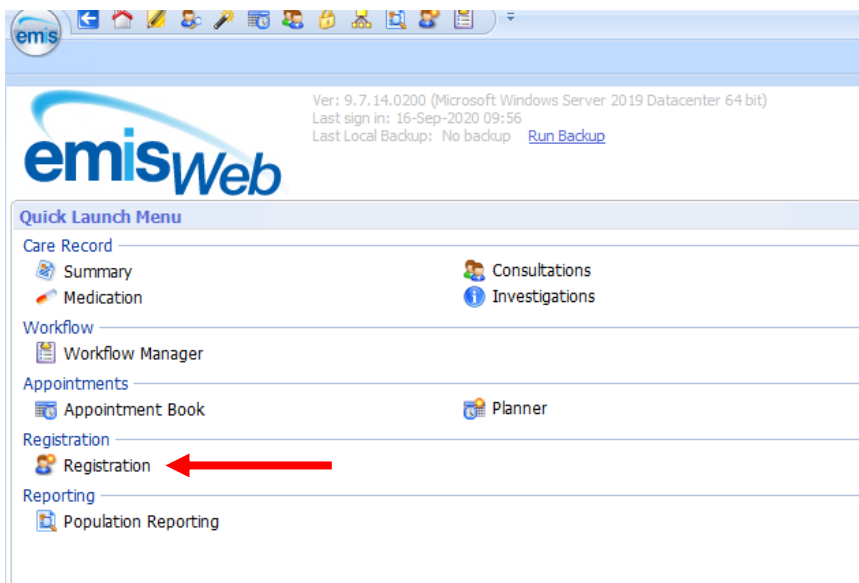
The system will register the patient and the details should change in the patient bar.



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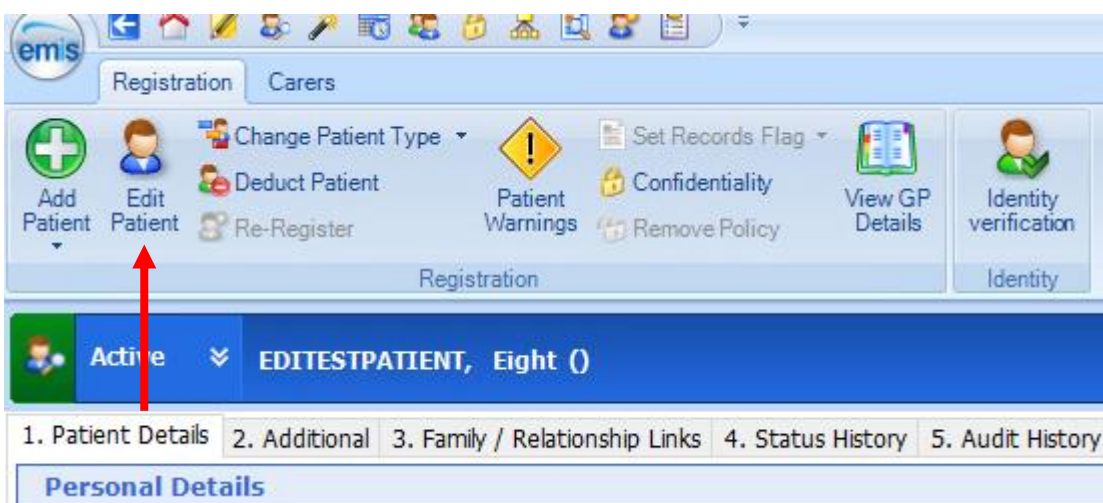
### Editing a patient registration

Although there is a record sharing agreement in place, this does not automatically update patient registration information between different EMIS systems. If a patient updates their information with their registered practice this will not update the MBPCC EMIS system. When carrying out tasks in the extended access system users should always verify the patient details are up to date. This would include things such as address, phone numbers and their registered GP practice.



From the Home screen, click on Registration.

Click Edit Patient on the toolbar.



On the Patient Details page change any information that is incorrect.



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Edit community registered patient

Patient Details

Additional

Notification preferences

Additional Notes

Patient Details

Personal Details

\* Title

\* Family Name

\* Given Name

Middle Name(s)

Known as

Previous Family Name

\* Date of Birth

NHS Number

\* Gender

Religion

Marital Status

Ethnicity

Main Language

Interpreter Required

Alt. Correspondence Format

Home Address

House Name/Flat Number

Number & Street

Locality

Town/City

County

Postcode

Access Instructions

Contact Details

Home Tel No

Work Tel No

Mobile Tel No

Fax Number

Video Conferencing Details

Previous Email Address

Back Next OK Cancel

To update the registered GP Details, go to the Additional page.

Edit community registered patient

Patient Details

Additional

Notification preferences

Additional Notes

Additional

GP Details

Current GP details

Title

Family name

Given name

Current GP practice

Previous Home Address

House Name/Flat Number

Once all details have been updated, click OK.