Quick Reference Guide to Registration Links

Note - This quick reference guide is for practices in **England**, **Wales** and **Northern Ireland** only.

When you register a patient in **Registration** 

, the details are sent electronically to your **Trading Partner (TP)** where they are processed centrally. Your **TP** send registration messages back to your system containing changes such as deductions, amendments and approvals of new patients. This two way exchange of registration data is processed in **Registration Links**

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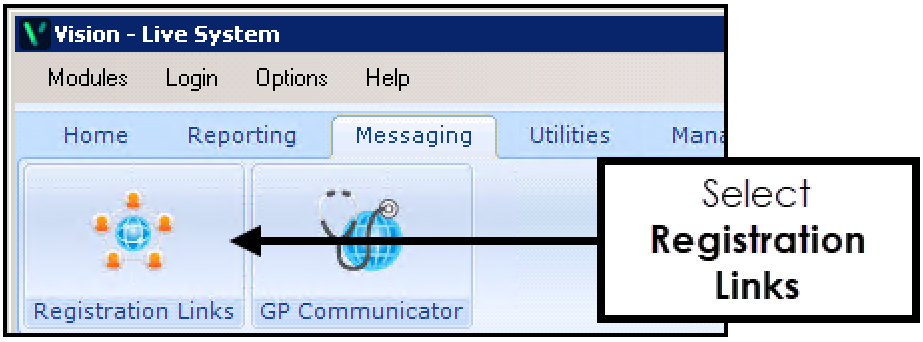
This guide explains what you should be checking on a regular basis.

To access **Registration Links**:

- From the **Vision 3** front screen, select **Messaging** - **Registration Links**:

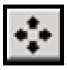


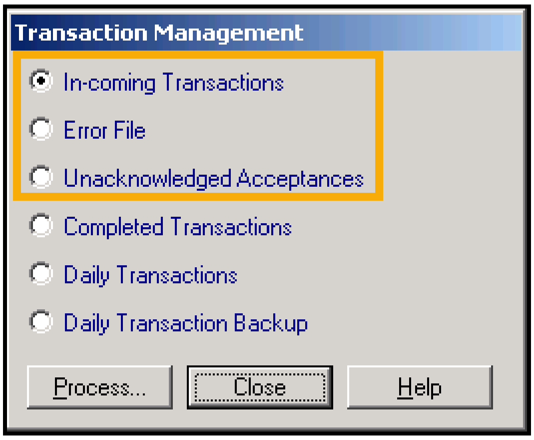
Transaction Management

It is important to check incoming and outgoing registration messages on a regular basis.

To check registration messages:

1. From the **Vision 3** front screen, select **Messaging** - **Registration Links** 

.
2. Select **Transaction Management** .
3. The **Transaction Management** screen displays:



The top three options should be checked on a regular basis:

- **In-coming Transactions**, see **Dealing with Incoming Transactions** on page **3**.
- **Error File**, see **Dealing with the Error File** on page **7**.
- **Unacknowledged Acceptances**, see **Unacknowledged Acceptances (Frozen Patients)** on page **12**.

Select the transaction type you require and select **Process.**

Dealing with Incoming Transactions

The **Incoming Transactions** screen shows a summary of the different messages received from the Health Board that require action.

To process a transaction, highlight it and select **Process**.

The next section explains how to deal with the following message types:

- **Deduction** - A deduction is received when your patient is being removed from the practice list.
- **Amend In** - An amendment is received when the Health Board update a patient's registration details.
- **Acceptance (Rej)** - An acceptance rejection is received when a patient has been registered with the wrong Health Board.

Training Tip - Select Reports to print any of the incoming transactions before processing them.

Deductions

Deductions sent by the TP are listed in **Incoming Transactions** and can either be accepted or rejected:

Training Tip - Before accepting a deduction you may want to print the deduction list in order to pull the patient's record, simply select **Reports**. Change the report type to **Deductions requested by HB** and select **Process**.

To accept a deduction:

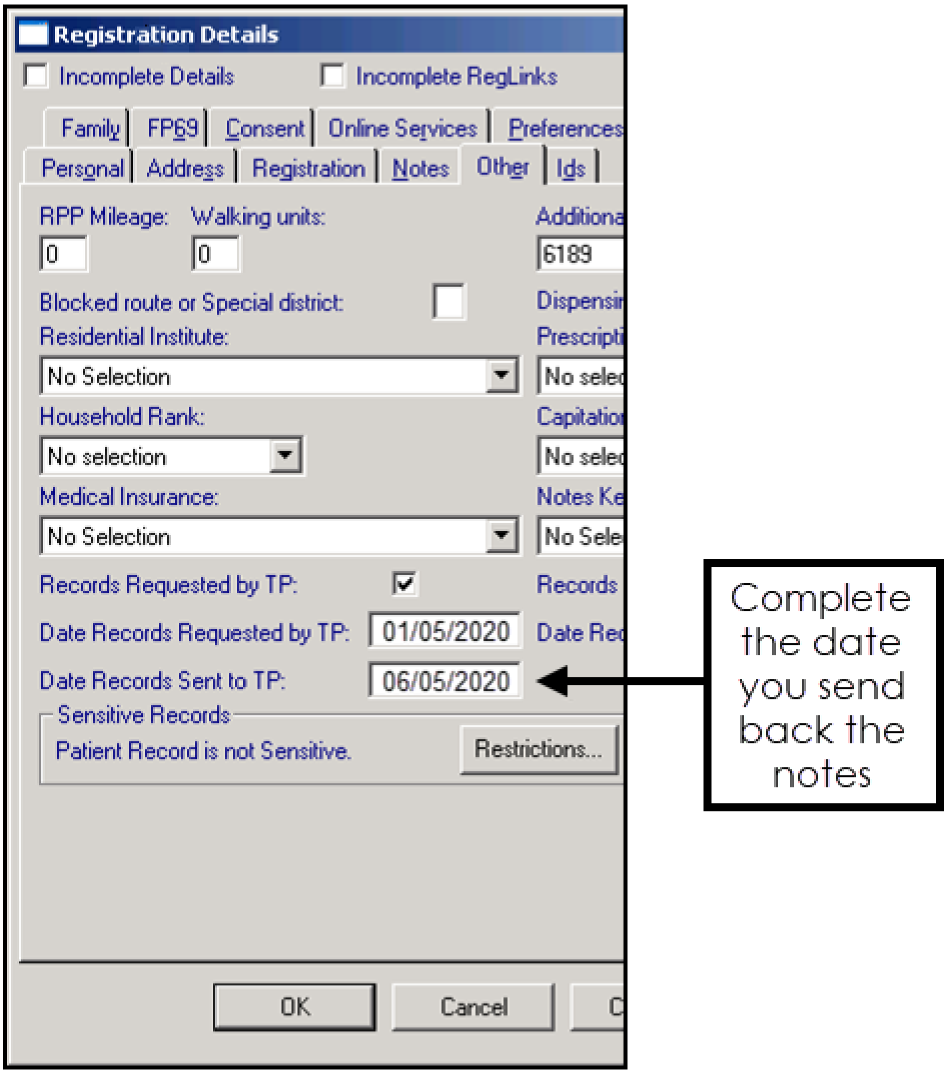
1. From **Registration Links** , select **Transactions Management** .
2. Select **In-coming Transactions** and then **Process**.
3. Highlight the deduction required and select **Process**.
4. At the top of the screen is the reason for the deduction. If you are happy for the patient to be transferred out, select **Deduct**. This automatically changes the patient's registration status to **Transferred Out** with the reason provided by your TP.

When you return the records to your TP you should record the date in the patient's registration screen.

To record the date records sent to TP:

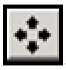
1. From **Registration** 

, select the patient in the usual way.
2. Select the **Other** tab.
3. Add the date notes returned to TP in **Date Records Sent to TP**:



4. Select **OK** to save the changes.

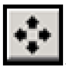
To reject a **Deduction**:

1. From **Registration Links** , select **Transactions Management** .
2. Select **In-coming Transactions** and then **Process**.
3. Highlight the deduction required and select **Process**.
4. Select **Re-accept**.
5. The **Notes on Re-acceptance** screen displays, enter a reason for rejecting the deduction in **GP Notes**. This should be a brief explanation of why you do not want the patient to be removed from your list.
6. Select **OK** and the rejection message is sent back to the TP.

Amendments

An **Amend** transaction is an amendment sent by your TP, you can either accept or reject them:

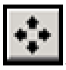
To accept an amendment:

1. From **Registration Links** , select **Transactions Management** .
2. Select **In-coming Transactions** and then **Process**.
3. Highlight the amendment required and select **Process**.
4. The **In-coming Amendment** screen is displayed. The amendment is displayed on the right.
5. Simply select **Accept** which automatically changes the details in the patient's registration record.

Note - A percentage **%** sign indicates that the contents are to be removed.

To reject an amendment:

1. From **Registration Links** 

, select **Transactions Management** .
2. Select **In-coming Transactions** and then **Process**.
3. Highlight the amendment required and select **Process**.
4. The **In-coming Amendment** screen is displayed. The amendment is displayed on the right.
5. Simply select **Reject** and enter a reason for the rejection.

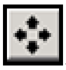
Please note, if a change of address is outside the practice area, you can select **Remove OA** to indicate you want the patient removed from your list because they are outside of your practice area.

Acceptance Rejection

An acceptance rejection message, **Acceptance (rej)** occurs where an acceptance has been rejected because the patient has been registered with the wrong TP, for example, cross border practices. The acceptance is rejected by one TP and the patient needs to be re-accepted with the correct TP.

To process an **Acceptance (rej)**:

1. From **Registration Links** 

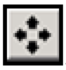
, select **Transactions Management** .
2. Select **In-coming Transactions** and then **Process**.
3. Highlight the amendment required and select **Process**.
4. Select **Re-accept** and enter the details of why in **GP notes** if required.
5. Select **OK** to complete the transaction.

Dealing with the Error File

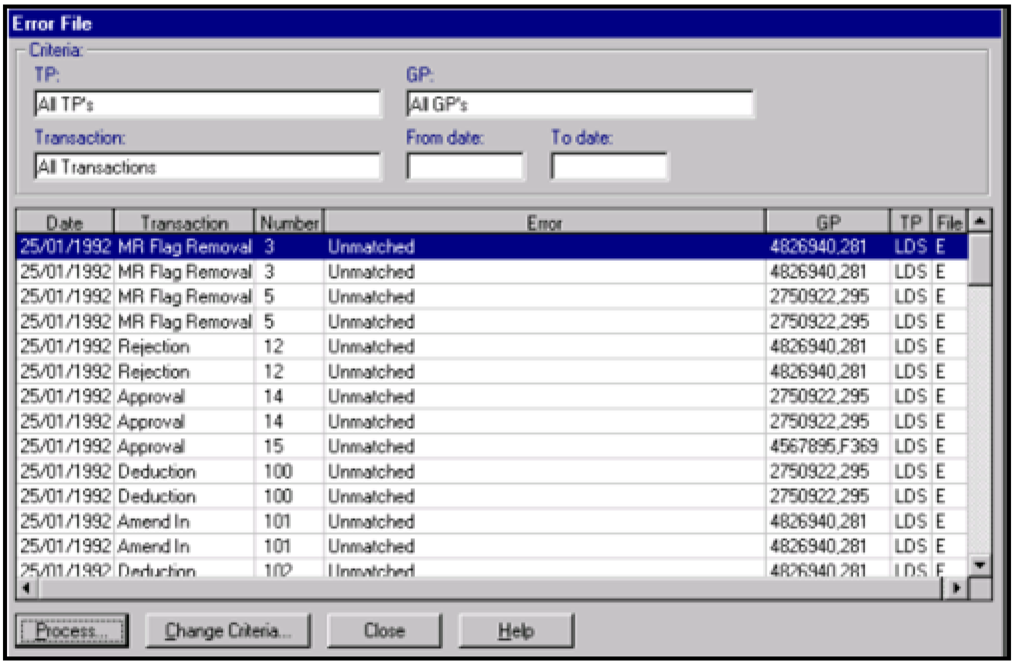
Any incoming transactions from your TP that cannot be matched with one of your patients is placed in the **Error File** as an **Unmatched** transaction. The error does not show the patient's name so before dealing with the error you need to identify the patient by searching on their NHS/H+C number or Date of Birth.

To find the patient's NHS/H+C number or Date of Birth:

1. From **Registration Links** 

, select **Transactions Management** .
2. Select **Error File** and then **Process**.
3. Highlight the error required and select **Process**.

If this information is not available, you cannot resolve the unmatched transaction and the only action you can take is to delete the error.



Date	Transaction	Number	Error	GP	TP	File
25/01/1992	MR Flag Removal	3	Unmatched	4826940,281	LDS	E
25/01/1992	MR Flag Removal	3	Unmatched	4826940,281	LDS	E
25/01/1992	MR Flag Removal	5	Unmatched	2750922,295	LDS	E
25/01/1992	MR Flag Removal	5	Unmatched	2750922,295	LDS	E
25/01/1992	Rejection	12	Unmatched	4826940,281	LDS	E
25/01/1992	Rejection	12	Unmatched	4826940,281	LDS	E
25/01/1992	Approval	14	Unmatched	2750922,295	LDS	E
25/01/1992	Approval	14	Unmatched	2750922,295	LDS	E
25/01/1992	Approval	15	Unmatched	4567895,F369	LDS	E
25/01/1992	Deduction	100	Unmatched	2750922,295	LDS	E
25/01/1992	Deduction	100	Unmatched	2750922,295	LDS	E
25/01/1992	Amend In	101	Unmatched	4826940,281	LDS	E
25/01/1992	Amend In	101	Unmatched	4826940,281	LDS	E
25/01/1992	Deduction	102	Unmatched	4826940,281	LDS	E

Note - To resolve errors you may need to use **Registration - Security**, only System Managers have access to these options.

Unmatched - Incoming Approval

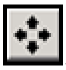
An **Approval** in the **Error file** indicates that an acceptance has been received but it could not be matched to a patient. You need to find the patient in **Registration** by searching on the NHS/H+C number and dependent on their registration status do one of the following:

Permanent

If the patient is **Permanent**, it means the patient has already been accepted and is on your practice list. The approval in the error file may be a duplicate so all you need to do is delete it.

To delete the error:

1. From **Registration Links** 

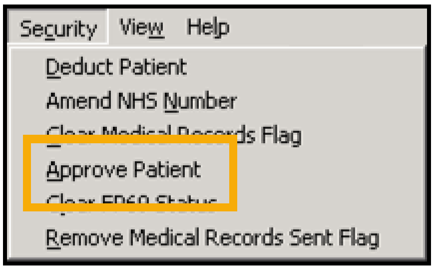
, select **Transactions Management** .
2. Select **Error File** and then **Process**.
3. Highlight the error required and select **Process**.
4. Now, simply select **Delete**.

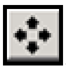
Applied

If the patient is still **Applied** it means they are not yet registered with your practice and you need to security approve the patient.

1. From **Registration** 

, select **Security** - **Approve Patient**.



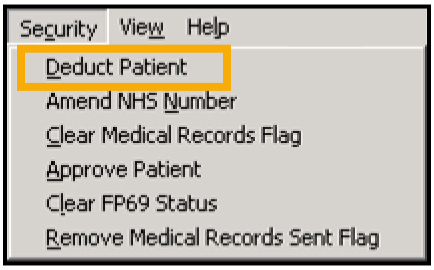
2. Select the patient required and the **Security Approved** screen displays.
3. Enter the patient's NHS/H+C number and select **OK**.
4. You now need to delete the error, from **Registration Links** , select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Now, simply select **Delete**.

Unmatched - Deduction

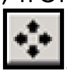
A **Deduction** in the **Error file** indicates that a deduction has been received but it could not be matched to a patient. You need to find the patient in **Registration** by searching on the NHS/H+C number. Normally deductions are initiated by the TP and practices should not deduct patients but in this scenario you can security deduct the patient, otherwise the patient remains on your list as permanent:

1. From **Registration** 

, select **Security** - **Deduct Patient**.



2. Select the patient required, enter the date of the deduction and choose a deduction reason, for example, **Other Reason**.
3. Select **OK**.
4. You now need to delete the error, from **Registration Links** 

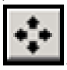
, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Now, simply select **Delete**.

Unmatched - Amendment

An **Amendment** in the Error file indicates that an amendment has been received but it could not be matched to a patient. You need to find the patient in **Registration** by searching on the NHS/H+C number. You should check the amendment and manually update the information in the patient's registration record:

1. From **Registration** 

, select the patient in the usual way.
2. Update the details required and then select **OK**.
3. You now need to delete the error, from **Registration Links** 

, select **Transactions Management** .
4. Select **Error File** and then **Process**.
5. Highlight the error required and select **Process**.
6. Now, simply select **Delete**.

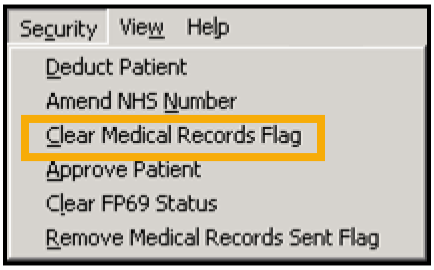
Unmatched - Medical Record Flag

Medical Record Flags are notifications that are sent to and from your TP when records are sent and received. When your TP send a new patient paper record a **Medical Record Flag sent** is set which the practice should remove on receipt of the records. When a patient is deducted a **Medical Record Flag Removal** is set which should be removed when your TP receive the patient's record. If the flags are not matched to a patient they display in the **Error** file.

To clear a **Medical Record Flag**:

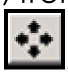
1. From **Registration** 

, select **Security** - **Clear Medical Records Flag**:



2. Select the patient required and the **Security Med Flag** screen displays.
3. Tick **Confirm you wish to Clear Medical Record Flag** and select **OK**:

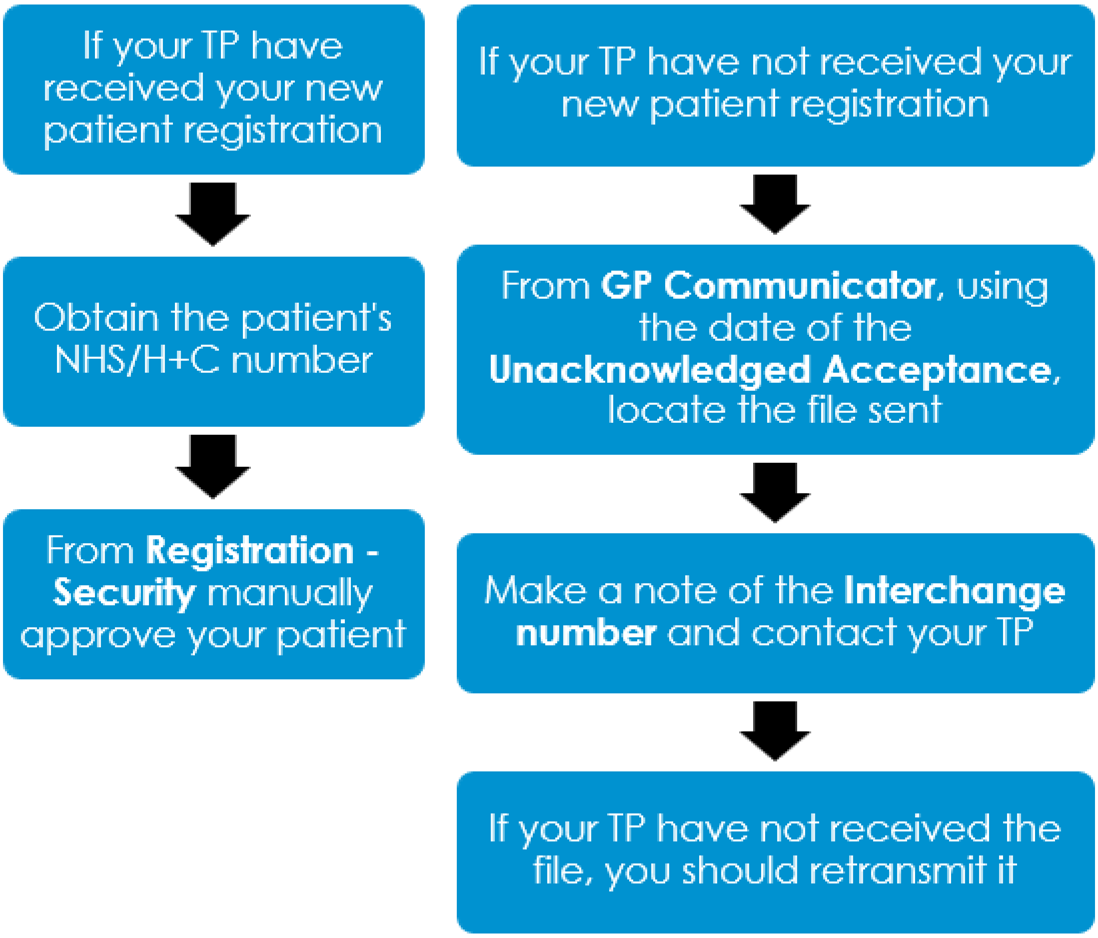
4. You now need to delete the error, from **Registration Links** 

, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Now, simply select **Delete**.

Unacknowledged Acceptances (Frozen Patients)

When you add a new patient in **Registration**, an **Acceptance Transaction** is generated. This is sent in the next transmission to your TP, the patient's Registration record is "frozen" and they are placed in the **Unacknowledged Acceptances** file. Once an approval is received from your TP the patient's name is automatically removed from this file, they have an NHS/H+C number and their registration details are "unfrozen".

You should view your **Unacknowledged Acceptances** on a regular basis to make sure all new patients have been accepted. For patients who have been registered for more than a week and are still in this file, you should contact your TP to check they have received the registration:

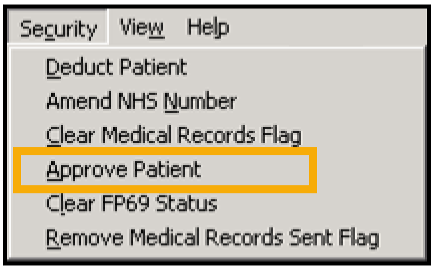


If your Trading Partner/Health Board have received your New Patient

To manually approve a patient if there has been a problem with a transmission:

1. First obtain the patient's NHS/H+C number and permission to approve the patient from your TP.
2. From **Registration** 

, select **Security** - **Approve Patient**:



3. Select the patient required and the **Security Approved** screen displays.
4. Enter the patient's NHS/H+C number and select **OK**.

If your Trading Partner/Health Board have not received your New Patient

If the **TP** have not received your new patient registration you need to:

1. Make a note of the date that the **Unacknowledged Acceptance** was sent to the **TP**.
2. From **Messaging**, select **GP Communicator** 

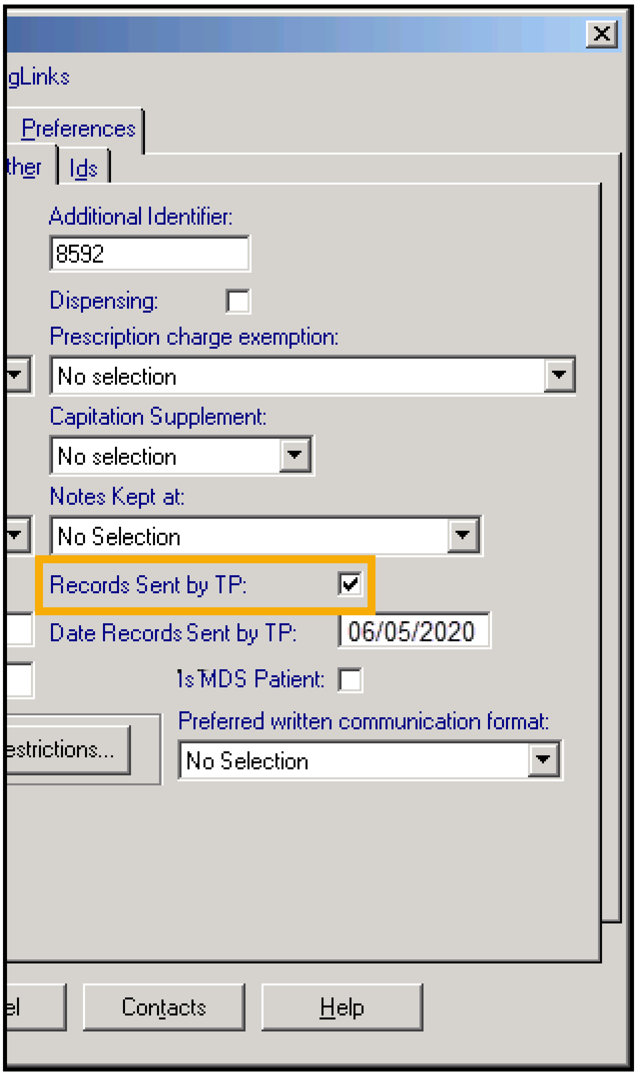
.
3. Find any files sent on the same date or within a couple of days of the unacknowledged acceptance and make a note of the **Interchange number**. Contact the TP to see if they have received it.
4. If the **TP** have not received the file, right click on it and select **Re-Transmit**.
5. If you cannot find the file or if the TP have already received it, contact the Service Desk in the usual way.

On Receipt of the Patient's Record

When the records are received for a patient, you should record their receipt by updating the **Registration** screen:

1. From **Registration** 

, select the patient in the usual way.
2. Select the **Other** tab.
3. Remove the tick from **Records Sent by TP**:



4. Now select **OK**. An acknowledgment is sent back to the **TP** that you have received the patient's paper record.

Recording a Read code

It is no longer a QOF requirement to summarise the patient's records within eight weeks, however, we recommend that you record when the records are received and when they are summarised in the patient's journal by Read coding:

- **Read code #9314 -** Lloyd George record received.
- **Read code #9344** - Notes summary on computer.