

Quick Reference Guide to Registration Links - Scotland



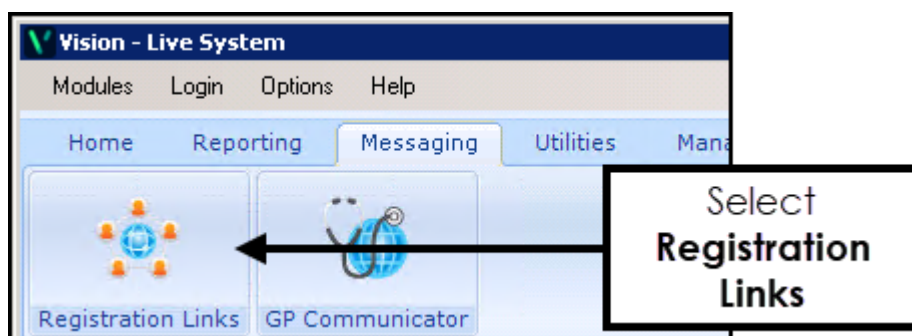
Within **Vision 3**, when you register a patient in **Registration**, the details are sent electronically to Practitioner Services Division (PSD) where they are processed centrally. PSD send registration messages back to your system containing changes, for example, deductions, amendments and approvals of new patients. This two-way exchange of registration data is



processed in **Registration Links**.

This guide explains what you should be checking regularly.


To access **Registration Links**, from the **Vision 3** front screen, select **Messaging - Registration Links**:

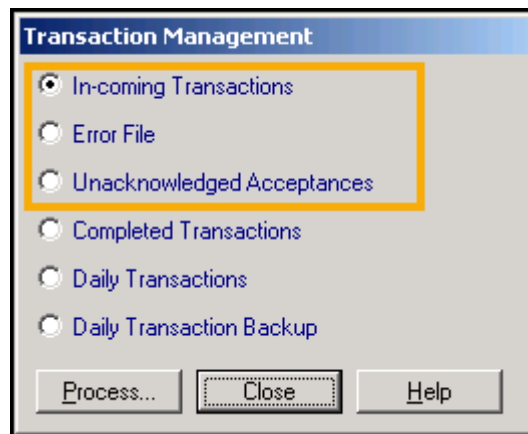


Transaction Management

It is important to check incoming and outgoing registration messages regularly.

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:



Check the top three options regularly:

- **In-coming Transactions** - See **Incoming Transactions** on page 2.
 - **Error File** - See **Dealing with the Error File** on page 7.
 - **Unacknowledged Acceptances** - See **Unacknowledged Acceptances (Frozen Patients)** on page 11.
4. Select the transaction type you require and select **Process**.

Incoming Transactions

The **Incoming Transactions** screen shows a summary of the different messages from PSD that require action:

- **Deduction** - A deduction removes a patient from your practice list.
- **Amend In** - An amendment updates a patient's registration details.
- **Acceptance (Rej)** - An acceptance rejection indicates a patient has been registered with the wrong Health Board.

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



Training Tip - You can print any of the incoming Transactions before processing them by selecting **Reports** .


Deductions

Deductions can either be accepted or rejected. To ensure a GP2GP transfer of records takes place, when you receive a deduction request in **Registration Links**, you must process the deduction in **Docman**:

Accepting a Deduction

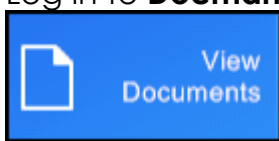



Training Tip - If you want to print the deduction list before

processing them in Docman, select **Reports** , change the report type to **Deductions requested by HB** and select **Process**.

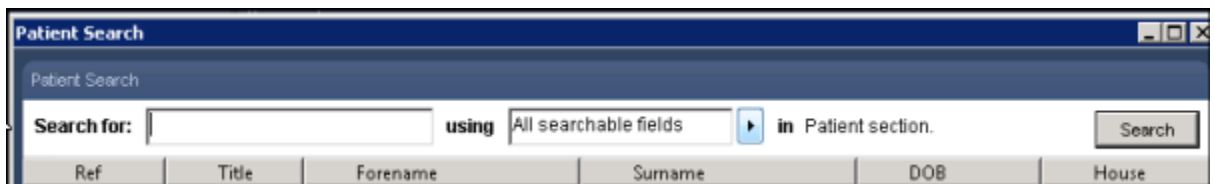
To process a deduction:

1. Log in to **Docman** if required and select **View Documents**



2. From the **Selection List**, select **Patient** .

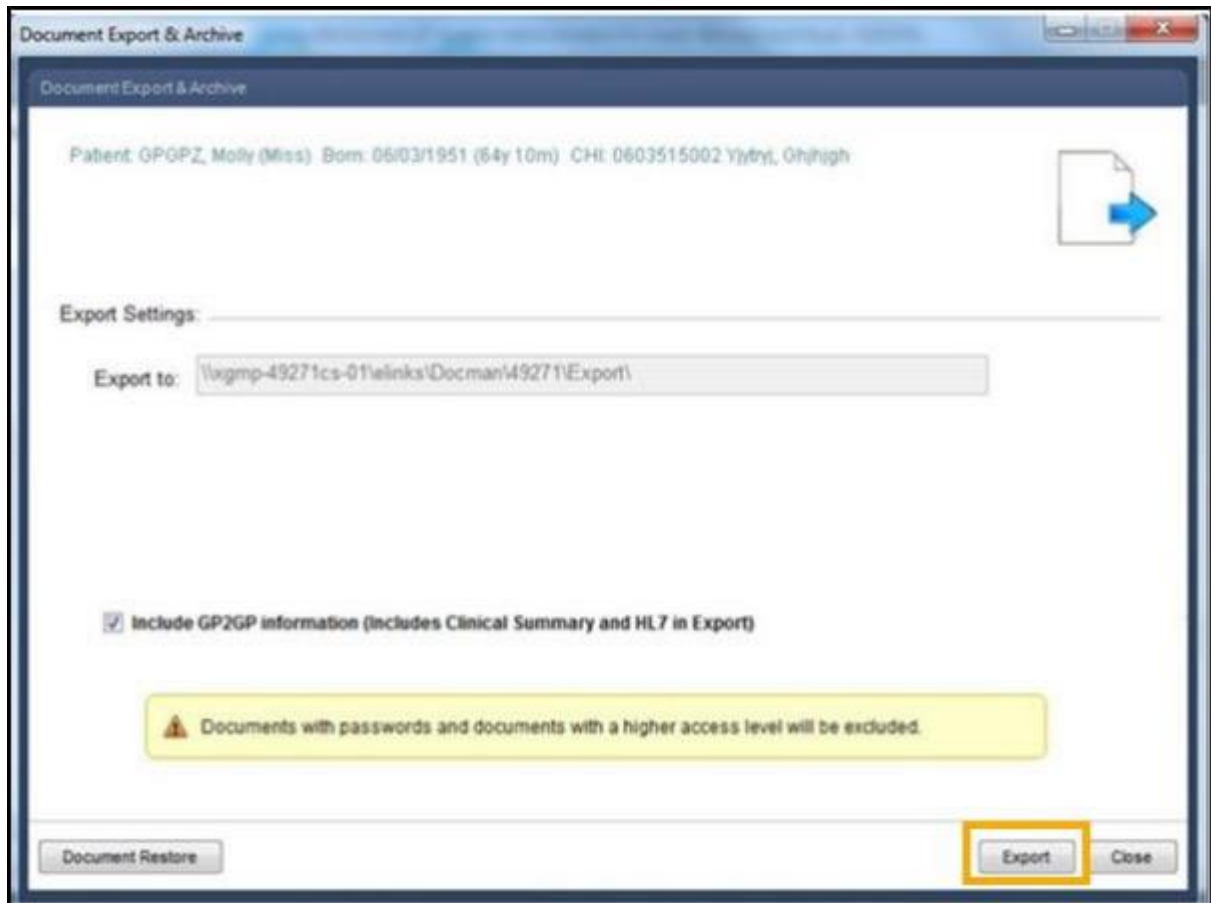
3. Search for the patient using **CHI** or **Date of Birth** (for more accurate results):



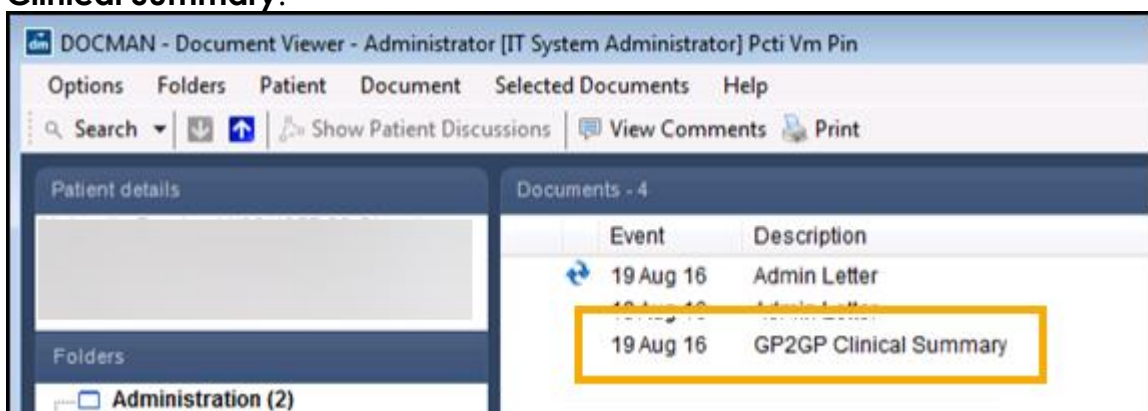
4. Highlight the patient you want to deduct and select **Export**:



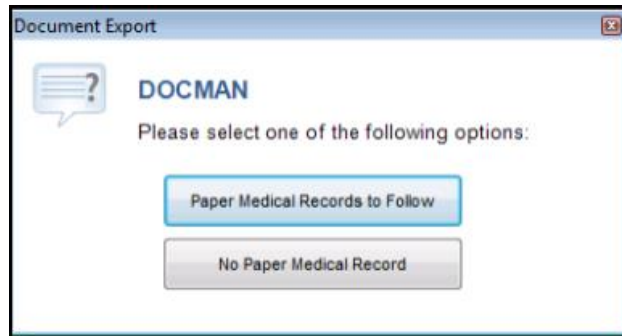
5. The **Document Archive & Export** screen displays, select **Export**:



A copy of all the data held in **Vision 3** for the selected patient extracts into the patient's record in **Docman**. The record exports along with all the patient documents and is added to the eLinks folder and forwarded to the new practice. It is at this point that the export process triggers an accepting incoming deduction message from PSD. A full patient clinical summary is also created and held as a printable document within the patient's documents in **Docman**, titled **GP2GP Clinical Summary**:



- You are prompted to confirm if there are any additional paper medical records, select as appropriate. This selection does not affect the export, but notifies the receiving practice:

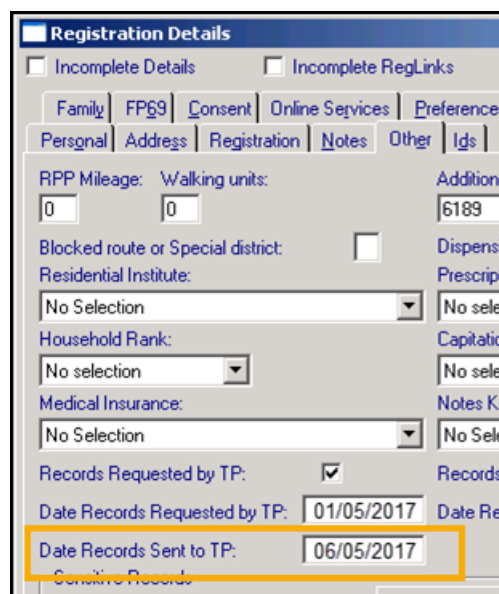


- The 'Archive completed' message displays, select **OK**.
- Finally, a prompt displays detailing the eLinks extract folder where the patient's data and files are saved. Select **OK** to close.

The Read term **92...00 – Patient de-registered** records in the patient's record for auditing and search purposes. When you return the records to your TP/HB you should record the date in the patient's **Registration** screen.

To record the dates records sent to TP/HB:

- From the **Vision 3** front screen, select **Registration** and then select the patient in the usual way.
- Select the **Other** tab and add the date notes returned to TP/HB in **Date records sent to TP:**





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



See [GP2GP – Deducting a Patient – Scotland only](#) in the **Consultation Manager Help Centre** for full details.

Rejecting a Deduction

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 the **Re-acceptance** screen displays, enter a brief explanation of why you do not want the patient to be removed from your list in **GP Notes**.
6. Select **OK** and the rejection message is sent back to the TP/HB.

Amendments

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

Accepting Amendments


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 displays with the amendment 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 of the section are to be removed.

Rejecting Amendments


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 displays, the amendment on the right.
5. Simply select **Reject** and enter a reason for the rejection, or 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 when an acceptance has been rejected because the patient has been registered with the wrong TP/HB, for example, cross-border practices. The acceptance is rejected by one TP/HB and the patient must be re-accepted with the correct HB.

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 a free text note in **GP notes**.
5. Select **OK** to complete the transaction.

Dealing with the Error File

Any incoming transactions from PSD that cannot be matched with one of your patients are 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 **CHI number** or **Date of Birth**. To find the patient's **CHI 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.


 **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 you have received an acceptance but it cannot be matched to a patient. You need find the patient in **Registration** by searching on the **CHI number** and dependent on their registration status do one of the following:

Permanent

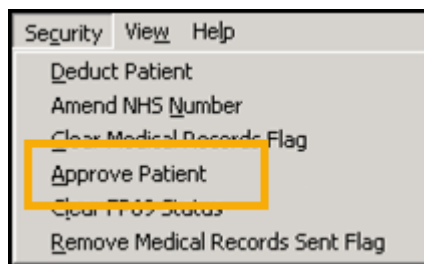
If the patient is **Permanent** it means the patient is already accepted and is on your practice list. The approval in the **Error file** may be a duplicate so all you need to do is delete it.


1. From **Registration Links**, select **Transactions Management** .
2. Select **Error File** and then **Process**.
3. Highlight the error required and select **Process**.
4. Finally, 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**.

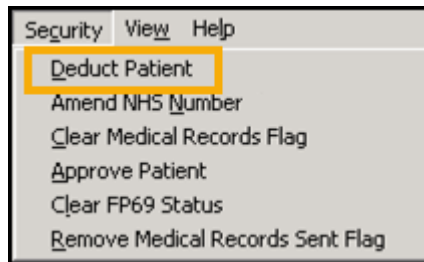



2. Select the patient required and the **Security Approved** screen displays.
3. Enter the patient's **CHI number** and select **OK**.
4. Now, from **Registration Links**, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Finally, select **Delete**.

Unmatched - Deduction

A **Deduction** in the **Error file** indicates that a deduction has been received but it cannot be matched to a patient. You must find the patient in **Registration** by searching on the **CHI number**. Normally deductions are initiated by the PSD 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. Now, from **Registration Links**, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Finally, select **Delete**.

Unmatched - Amendment

An **Amendment** in the **Error file** indicates that an amendment has been received but it cannot be matched to a patient. You must find the patient in **Registration** by searching on the **CHI number**. You should check the amendment and manually update the information in the patient's registration record.

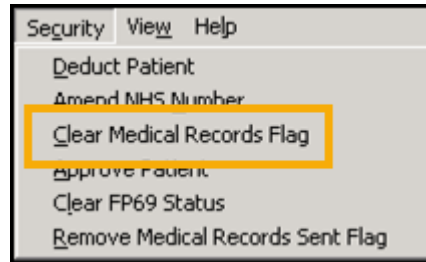
1. From **Registration**, select the patient in the usual way
2. Update the details required.
3. Select **OK**.
4. Now, from **Registration Links**, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Finally, select **Delete**.

Unmatched - Medical Record Flag


Medical Record flags are notifications that are sent to and from PSD when records are sent and received. When PSD send a patient's paper records 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 PSD receive the patient's records. 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. Tick **Confirm you wish to Clear Medical Record Flag**:



3. Select **OK**.
4. Now, from **Registration Links**, select **Transactions Management** .
5. Select **Error File** and then **Process**.
6. Highlight the error required and select **Process**.
7. Finally, select **Delete**.

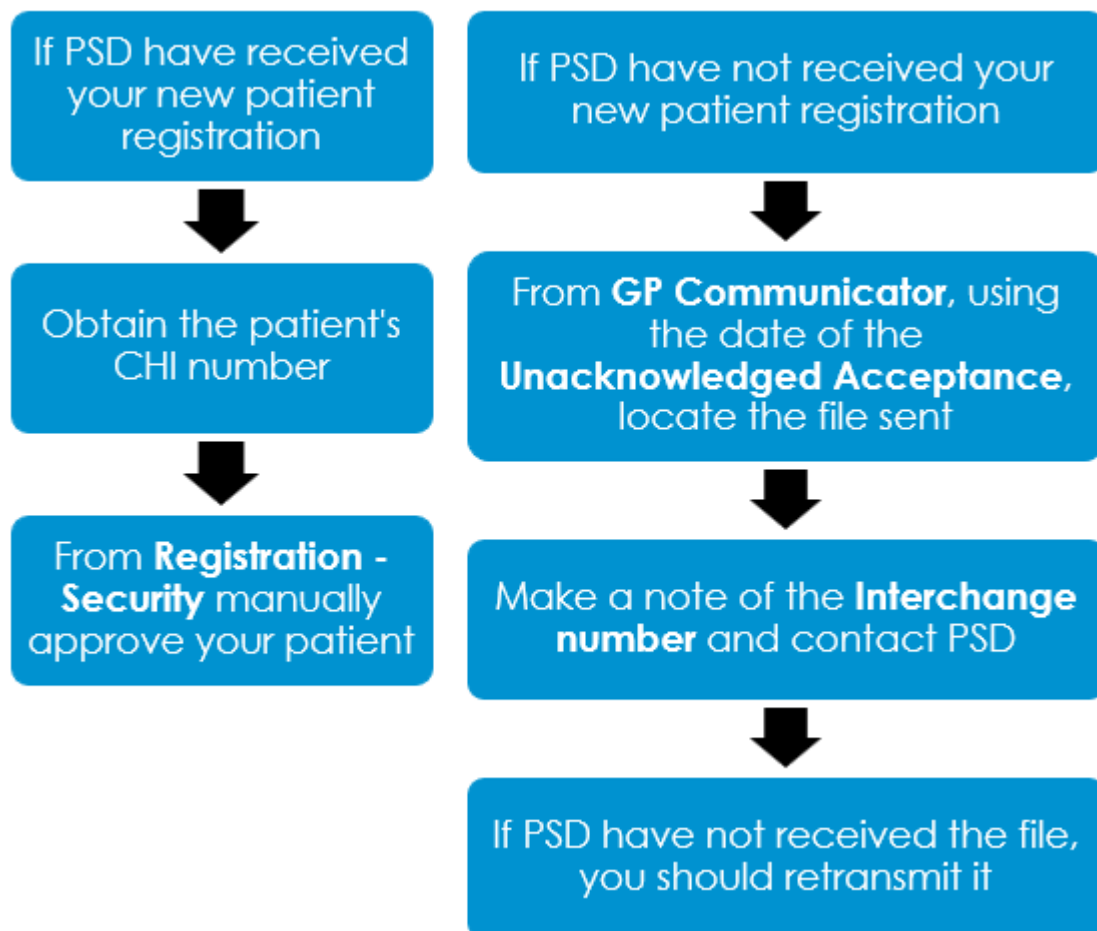


Training Tip - For more information on what Medical Record Flags are and how to deal with them, please refer to the on-screen help.

Unacknowledged Acceptances (Frozen Patients)

When you add a new patient in **Registration**, an Acceptance Transaction generate. This is sent in the next transmission to PSD and the patient's **Registration Details** screen becomes "frozen" and they are placed in the **Unacknowledged Acceptances** file. Once an approval is received from PSD the patient's name is automatically removed from this file, they have a CHI number and their registration details are "unfrozen".

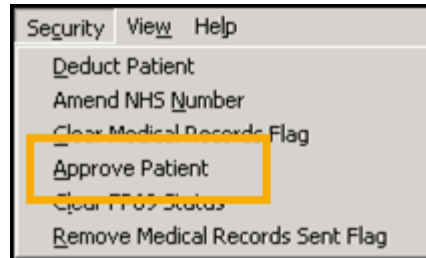
You should view your **Unacknowledged Acceptances** regularly to ensure all new patients are accepted. For patients who have been registered for more than a week and are still in this file, you should contact PSD to see if they have received the registration. Below is a summary of what you need to do:



If the PSD 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 **CHI number** and permission to approve the patient from the PSD.
2. From **Registration**, select **Security - Approve Patient**.



3. Select the patient required and the **Security Approved** screen displays.
4. Enter the patient's **CHI number** and select **OK**.

If PSD have not received your New Patient

If PSD have not received your new patient registration:

1. Make a note of the date that the **Unacknowledged Acceptance** was sent to PSD.
2. From the **Vision 3** front screen, select **Messaging - 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 PSD to see if they have been received.
4. If PSD have not received the file, right click on it and select **Re-Transmit**.
5. If you cannot find the file or if PSD have already received it, contact the Helpline in the usual way.

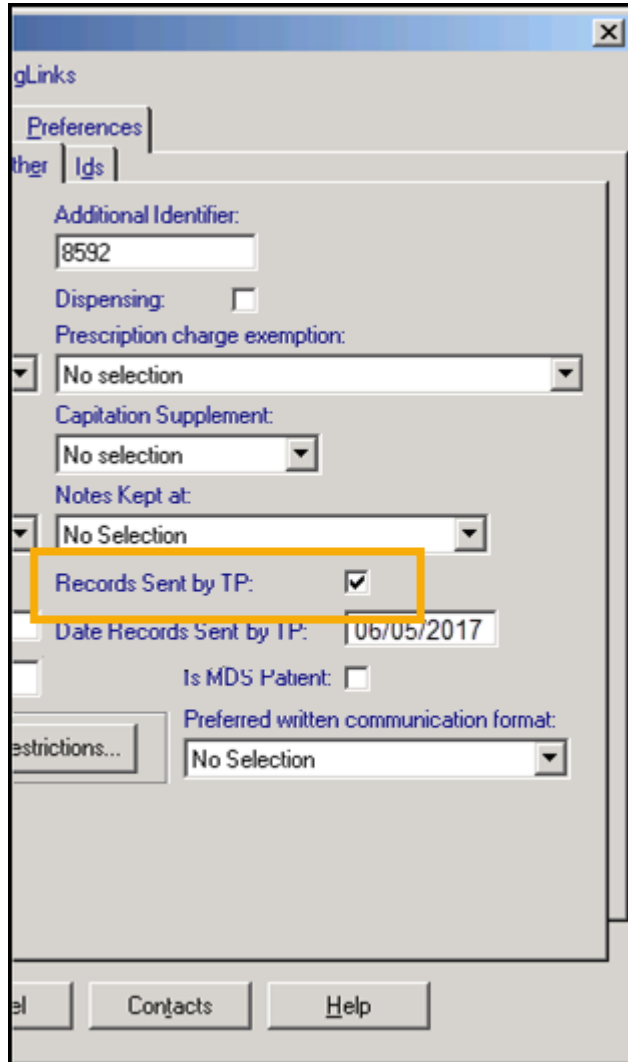


Training Tip - When a patient's record is approved by PSD, the paper record is sent and the electronic record can be imported via the **Import** facility in **Docman**.

On Receipt of the Patient's Record

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

1. From **Registration**, select the patient in the usual way.
2. Select the **Other** tab and remove the tick from **Records Sent by TP:**



The screenshot shows a window titled 'gLinks' with a 'Preferences' tab selected. Under the 'Other' sub-tab, the 'Records Sent by TP:' checkbox is checked and highlighted with a yellow box. The 'Date Records Sent by TP:' field is set to '06/05/2017'. Other fields include 'Additional Identifier: 8592', 'Dispensing: [unchecked]', 'Prescription charge exemption: No selection', 'Capitation Supplement: No selection', 'Notes Kept at: No Selection', and 'Preferred written communication format: No Selection'. The 'Is MDS Patient:' checkbox is also unchecked.

3. Now select **OK**. An acknowledgment now notifies PSD that you have received the patient's paper record.

Recording a Read code

We recommend that you record when they are summarised in the patient's journal by adding the following clinical term:

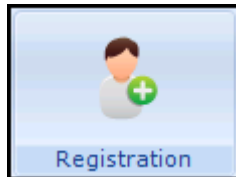
- **Read code #9344** - Notes summary on computer.

Cancelling Registrations

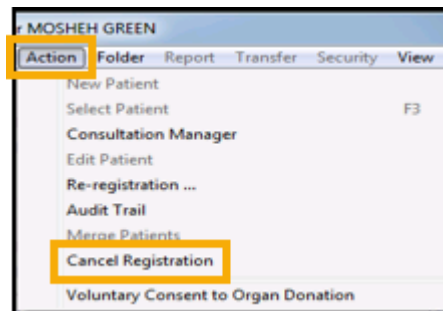
If you accidentally register a duplicated patient:

- Their registration record is frozen, as they do not have a valid CHI number and therefore cannot be processed, and
- **Security** cannot be used as you cannot allocate a duplicated CHI Number.

To enable you to remove any patients with frozen registration records caught in this scenario:



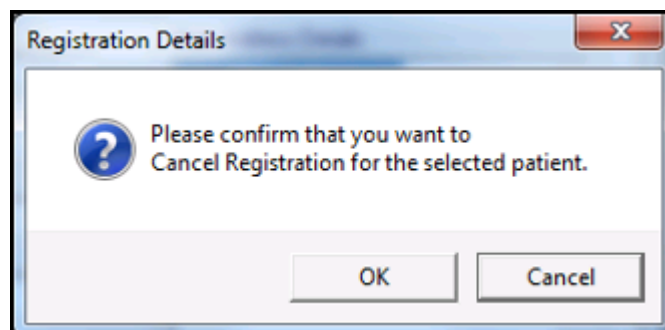
1. From **Registration**, select the patient record concerned.
2. Select **Action - Cancel Registration**:



3. **Vision 3** validates the record for cancellation, in order to continue with the cancellation the patient record must have:
 - A registration status of **Applied**
 - No CHI number
 - An **Unacknowledged Acceptance**

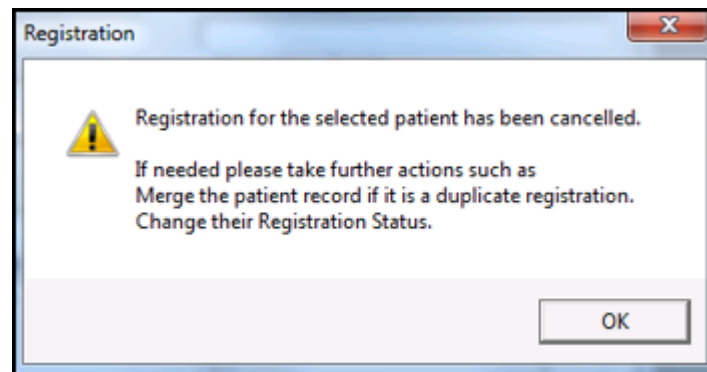
If any of these criteria are not met, an error message displays and the cancellation does not continue.

4. A confirmation message displays, select **OK** to continue:



5. A message reminding you to notify your Health Board of your actions, select **OK** to confirm.

6. The confirmation of cancellation message displays:



Select **OK** to confirm and the following actions automatically complete:

- The patient's registration status is updated to **Transferred Out** with a reason of **Registration Cancelled**.
- The patient registration record is unfrozen.
- In **Registration Links**, the **Unacknowledged Acceptance** is deleted.