EMIS Web Registration Workflow Guide

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

Contents

Introduction

Registration Workflow enables information to be exchanged between your organisation and PCSE. Each organisation and trading partner has its own mailbox.

When you register a new patient or amend a patient's details, Registration Workflow sends the information to PCES. Similarly, PCSE uses Registration Workflow to send patient information updates to your organisation.

Certain Registration Workflow transactions automatically update patient records in EMIS Web (for example, registration status). In other cases, users with the appropriate role can use the Registration Workflow high security functions to process transactions manually.

Access Registration

To access Registration Workflow, click the EMIS Web menu > , point to Workflow, click Workflow Manager, and then select Registration in the navigation pane.

To access Registration Workflow, you must have RBAC activity B1680 Manage Demographic Duplicate Records in your role profile.

Registration Workflow activities

Warning: Before you take any action in Registration Workflow, make sure you have selected the correct patient.

The following example Registration Workflow activities result in transactions being sent to and from PCSE:

- Registering new patients
- Changing patients' registration details
- Removing patients
- Responding to patient deduction requests

Registration Workflow transmissions to and from your organisation run every 10 minutes.

New patient registrations

When a new regular patient is registered, a notification is sent from your organisation to PCSE. PCSE can then either accept or reject the new registration. The new registration notification transaction is displayed in the New Registrations section of the GP Links - Outbox. Possible outgoing transaction statuses are shown in the following table:

GP Links – Outbox: New Registrations	
Transaction Status	**Definition**
Incomplete	Incomplete GP Links Information screen when registered a regular patient.
Ready to send	Transactions are ready to be sent in the next DTS transmission schedule.

Unacknowledged	Waiting for a response from PCSE; this could be in the form of a registration acceptance transaction or you could manually accept it if you have been given the patient's NHS number and the PCSE has already accepted the patient at their end.
Unlinked	Transactions that you need to process manually (because the appropriate trading partner is not linked to your organisation electronically).

Approved registration transactions are displayed in the Awaiting Records section of the GP Links - Medical Record Box. Possible transaction statuses are shown in the following table:

GP Links – Medical Record Box: Awaiting Records	
Transaction Status	**Definition**
Awaiting Record	PCSE has accepted the new patient registration transaction but has not yet sent the medical records.
Medical Record Sent	PCSE has sent the patient's medical record.
Medical Record Received	The organisation has received the medical record.

Changing patient details

When a patient has been accepted, you must tell PCSE about any changes to the patient's registration details. The transactions relating to changes to a patient's registration details are displayed in the Amendments section of the GP Links - Outbox.

There is no corresponding incoming acceptance transaction from your trading partner in response to amendments.

Removing patients

Removal transactions are displayed in the Removals section of the GP Links - Outbox. Removal transactions are produced in response to notifications from PCSE that a patient has moved outside your organisation area.

Deduction requests

Deduction request transactions are displayed in the Deduction Requests section of the GP Links - Outbox. Deduction request transactions are produced in response to using the Request Deduction option in Registration to remove regular patients from your organisation list.

PCSE can also request deductions from your practice, these can be found in the Deductions section of the GP Links inbox.

Registration Workflow screen

The Registration Workflow screen includes the following transaction categories:

GP Links – Inbox

Incoming Registration Workflow transactions are displayed in the GP Links – Inbox section in the following categories:

Transaction Type	Definition
Amendments	Amendments to registration details received from PCSE.
Deductions	Patients to be removed from your organisation list, with the reason for the deduction (for example, the patient has moved out of the trading partner area). If you accept the incoming deduction form the trading partner, the patient will be deducted from your organisation list.
Rejections	Registrations rejected by the PCSE. The most common rejection reason is that the patient lives outside the trading partner area (not outside the organisation area). This usually happens if you deal with more than one trading partner and sent the registration to the wrong trading partner; in this case, re-register the patient with the correct trading partner.
Uploads	Information uploaded from the trading partner.
FP69s	Requests from PCSE for confirmation of a patient's address. FP69s are usually sent because the trading partner has been unable to contact a patient. You ***must*** respond to FP69s within six months.
Deduction Request Rejections	Deduction requests that PCSE has rejected, with the reason for the rejection (for example, because the patient has not yet registered at another organisation).
Close Quarter Notifications	Notifications that PCSE sends when it closes the registration quarter. On receipt of the notification, you must process all outstanding transactions before you can close the quarter.
Unmatched	Transactions received from PCSE that EMIS Web cannot match to a patient on your organisation list. Unmatched transactions are usually resolved by a manual process (for example, the organisation telephoning the trading partner).
Failed Approval	Registrations accepted by the trading partner but not accepted by EMIS Web, usually because they contain an NHS number that is already recorded in EMIS Web.

GP Links – Outbox

Outgoing Registration Workflow transactions are displayed in the GP Links – Outbox section in the following categories:

Transaction Type	Definition	Notes
New Registrations	New patient registrations. New registrations are *not* sent to PCSE until all the mandatory information is complete.	When you send a new registration to PCSE, a "freeze flag" is applied to the patient's record and you cannot amend the registration details until the trading partner accepts the registration.
Amendments	Any amendments you make to a patient's registration details after PCSE has accepted the patient.	The previous registration details are displayed next to the updated details.

Removal	Transactions confirming that you want to remove patients from your organisation list, after the trading partner has notified you that they have moved outside your organisation area.	
Deduction Requests	Patients that you want to deduct from your organisation list.	If you make a deduction request in error, you can delete it when it is ready to send, but not after it has been sent to PCSE. You can only deduct a patient for one of the following reasons: • Patient death • Patient embarkation • Patient left area

GP Links – Medical Record Box

Transaction Type	Definition	How To Process
FP22 Reminders	Transactions from PCSE asking you to return paper medical records for deducted patients.	In Registration Workflow, click **Send Medical Records**. In Registration, the patient's registration status changes to **Records Sent Back to FHSA**.
Awaiting Records	Newly registered patients for whom your organisation has not yet received paper records.	In Registration Workflow, click **Records Received**. In Registration, the patient's registration status changes to **Record Received**. You can also delete unwanted Awaiting Record transactions.
Records Returned, No Receipt	Newly deducted patients whose paper records have been sent back to PCSE, but for which your organisation has not yet received an acknowledgement.	You should receive acknowledgement from the trading partner, but not all trading partners send them. If an acknowledgement has not been received electronically, contact the trading partner to confirm the record has been received, you can remove the task(s) using the steps below: **Workflow Manager** – **Registration** – **Actions** – **Manage Medical Record Flagged Patients** – (**Select the patient**) – **Remove**. The task is removed from "Records Returned, No Receipt" and the patient will have the status "Records Sent Back to FHSA" added to their record.

Patient Facing Services

Transactions for Patient Services are displayed in the following categories:

Transaction Type	Definition
Pre-Registration	Pre-registration information sent using Patient Services.

Change Address Requests	Change of address information sent using Patient Services.
Online Registration	Online registration information sent using Patient Services.
Rejected Online Registration	Rejected online registration information sent using Patient Services.

Registration

Registration transactions are displayed in the following categories:

Transaction Type	**Definition**	**How To Process**
Duplicate Records	Transactions created in one or other of the following ways: • When a new record is created on the Spine with an NHS number that is already assigned to a patient in your organisation. • When a user identifies two patient records that may be duplicates and creates a duplicate record task.	Do one of the following: • If both records are for the same patient, delete one of the records (after adding any relevant data to the record that is to be kept). • If the records are for different patients, check the patient's records (using the Resolve Records option on the Registration Workflow ribbon) to help you to decide which patient should keep the NHS number, and then request a new NHS number for the other patient.
Deceased Notifications	Generated when a different organisation (where the patient is also registered) adds a deceased status to the patient. For example, a patient can be registered with a GP organisation and a district nurses' organisation. The task informs you that the patient has been made deceased and gives you the option to mirror this on your system.	Accept the task to mark the patient as deceased on your system.
Reverted Deceased Notifications	Generated when a patient was marked as deceased at a different organisation, then made active again.	Accept the task to remove the deceased status and make the patient active again.

Decoupled Records

Decoupled Records are the records of patients with outstanding PDS differences such as date of birth, date of death or gender. Patients are decoupled from the Spine until you manage PDS differences (i.e. synchronise the local record with the PDS record).

Manage PDS differences for the patient using the Synchronise Record option on the Registration Workflow ribbon.

If the patient is deceased, you cannot synchronise the record. You need to check the date of death the Health Authority (HA) has recorded, and then take the following action:

- If the date the HA has is incorrect, they can amend their records and you can delete the decoupled record using the ribbon option.
- If the date you have is incorrect, you need to amend it using Manual Status Modification. Delete the incorrect status, add the deceased status with the correct date, close, and then delete the decoupled record using the ribbon option.

Invalid Records

EMIS Web creates an invalid record task when an NHS number is no longer valid.

Registration Workflow Ribbon

When you access the Registration Workflow, a ribbon is displayed.

Guide to Ribbon Options

The options available on the ribbon may vary, depending on your organisation, location, role and the action you are taking.

Section	Option	Use To
View	Workflow View	• View your own tasks, plus the tasks of any other user(s) you are deputising for. This is the default view. • View tasks for other/all users (if you are configured as a global viewer).
Admin	Config	Access the Workflow Manager Configuration screen, to configure Registration Workflow settings.
Actions	Change Owner	Only available in PDS options.
	Add Note	Add notes to Registration Workflow transactions.
	Delete Note	Delete notes from Registration Workflow transactions.
	View History	Not available in Registration Workflow.
	Print	Print a list of all current Registration Workflow transactions (displayed in the main (right-hand) pane) and print the details of selected Registration Workflow transactions.
GP Links High Security	Actions	Access Registration Workflow high security options.
	DTS	Configure Registration Workflow transmission schedules and view the interchange history.
	Unlinked Transactions	View unlinked transactions.
Options	Approve (New Registrations)	Approve registration transactions manually (for unlinked trading partners).

	Complete (New Registrations)	Complete incomplete new registration transactions.
	Remove & Delete (New Registrations)	Remove and delete new registration transactions.
	Unlock In Edit (New Registrations)	Reset In Edit registration transactions to Ready To Send.
	Delete	Delete transactions (for Amendments, Deductions, Uploads, FP69s, Unmatched, Failed Approval, Deduction Requests, Awaiting Records, Records Returned No Receipt).
	Accept	Accept incoming transactions (for Amendments, Deductions, Uploads, Close Quarter Notifications).
	Amend (Amendment)	Process amendments to patients' registration details.
	Reject	Reject incoming transactions (for Amendments, Uploads).
	Remove (Amendment)	Deduct patients who have changed address and moved outside your organisation area.
	Re-Register	Re-register patients to the correct trading partner (for Deductions, Rejections).
	Cancel Registration (Rejections)	Process rejections: remove the corresponding registration transaction from the New Registrations section and change the patient status to Inactive.
	Reset Reports (Close Quarter Notifications)	Reset close quarter notifications generated in error.
	Add Duplicate Record Task (Duplicate Records)	Create tasks for investigation of duplicate records.
	View Merged Patients (Duplicate Records)	Unmerge patient records that have been merged incorrectly.
	Resolve Record (Duplicate Records)	Resolve duplicate records that share the same NHS number.
	Synchronise Record (Decoupled Records)	Synchronise decoupled local records with records on PDS.
	Process Upload	Process uploads from the trading partner.
	Reprocess (Unmatched)	Reprocess unmatched transactions.
	Complete Task	Complete tasks/transactions.
	Cancel Task	Cancel tasks/transactions.
	Records Received	Remove the medical record flag from the selected patient's record. Use this option when you receive paper medical records from a trading partner.

Example Patient Status

The Status History screen shows the different status changes of a single patient, displayed with the most recent status first.

Use the following table as a guide to the different registration statuses, in chronological order.

Registration Status	**Definition**
Patient has presented	The patient has asked to register at organisation A.
Application Form FP1 submitted	Organisation A has submitted a registration form to the trading partner.
Notification of registration	The trading partner has accepted the patient registration.
Medical record sent by FHSA	The trading partner has sent the patient's medical records to organisation A.
Record Received	Organisation A has received the patient's medical records from the trading partner.
Other Reason	The trading partner has requested a patient deduction and the patient status is now inactive.
Record Requested by FHSA	The trading partner has requested the medical records.
Records sent back to FSHA	Organisation A has sent the patient's medical record to the trading partner.
Records received by FHSA	The trading partner has received the patient's medical record.