2024

SystmOne Registration & Demographic Details

USER GUIDE

PRIMARY CARE SYSTEMS TEAM

Contents

Introduction

This user guide is aimed at providing staff with the process to use the SystmOne Registration Wizard to search both the SystmOne database and the Spine to register a new patient at their practice, and how use the Patient Details to amend a patient's personal information. We have included links to PCSE guidance for your reference.

Staff will still require specific role-based training and this is highly recommended.

It is the legal responsibility to protect patient confidentiality. The responsibility for safeguarding and using confidential information appropriately rests with each organisation.

1.   PCSE Useful Links

Patient Registration Overview
Patient Registrations | PCSE

A Guide to Patient Registrations
Patient-registrations-full-guide.pdf

How is Patient Registration Information Updated?
How-is-patient-registration-infromation-updated.pdf

Overview of the Registration Process
Overview-of-registrations-process.pdf

Tips for smooth registrations
9-tips-for-smooth-patient-registrations.pdf

Mistakes to look out for and avoid
Please refer to **page 3** on the PCSE Guide to Patient Registrations

High Security Settings
Please refer to **page 4** on the PCSE Guide to Patient Registrations

Common reasons for registration rejection
Please refer to **page 8** on the PCSE Guide to Patient Registrations

2.   Online Registrations - Register with a GP surgery

Benefits and features
Benefits and features | NHS Digital

Guidance for Practices
Sign up to start using Register with a GP surgery | NHS Digital

Guidance for patients
How to register with a GP surgery | NHS Digital
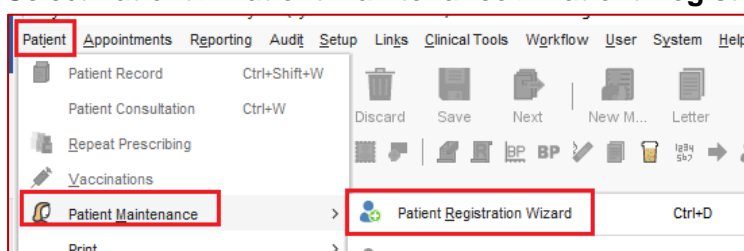
3. Registering New Patients on SystmOne

Users must be logged in with their smartcard to register a new patient, as the Patient Registration Wizard searches both the SystmOne and the Spine databases at the same time, removing the need to match a patient to Spine.

Note: If the Spine is disabled, you can still register the patient on SystmOne. When the patient record is next retrieved with Spine enabled, the user will be prompted to match the patient to their Spine record.

Registering with an NHS Number

The patient's NHS number is their unique identifier and should always be used if you have it

- Select **Patient > Patient Maintenance > Patient Registration Wizard** from the Main Menu

The **Register New Patient screen** is displayed

- Enter the NHS number of the patient you are registering in order to search both the SystmOne and the Spine databases for their record. Please check carefully, that you have entered the NHS number exactly
- Click **Search**. The search will be performed for both the patient's SystmOne and the Spine record

Note: If you do not have the patient's NHS number the minimum information you can enter is:
- Surname and
- Gender and
- Date of Birth (exact or between specified dates)

If matches are returned in the search, see Matches Found
If no search results are returned, see No Matches Found

Matches Found

If you used quite general search criteria, it is possible that too many matches will be found on the Spine. If this is the case, a message will be displayed. Click **OK**, narrow your search and try again.

If a small number of matches are found, a message is displayed saying that you can refine the search further or view the full list of the matches.

If the patient is not listed, do one of the following:

- Click **Reset** at the top of the screen and search again, or
- Click **Patient Is Not In This List** to create a new patient record

If the patient is listed:

- Click on the corresponding ✓ to the right of the screen. A message is displayed, asking you to confirm that the selected entry is the correct one
- Click **OK**. A message is displayed, explaining that this will create a new record on SystmOne using the values from the record held on the Spine and asking you to confirm that you want to proceed
- Click **Yes**. The Register New Patient – New Patient screen is displayed. **Note:** If you click No, a SystmOne patient record will be created that is not matched to a Spine record
- Beginning at the top, click the buttons down the left hand side of the screen to enter each Registration Item

- Click **OK** when you have completed each item

- When you have completed each of the sections as required, click **OK**

- The patient record is displayed
- Click the **Save** button on the Main Menu when you have finished working in the patient record

Note 1: If when registering the patient, the record is not initially found on SystmOne but is then located on the Spine, the system will check the SystmOne database again, using the details found on the Spine. If a patient record is subsequently found on SystmOne you will be prompted to register that patient, rather than create a new record

Note 2: When a patient is registered at a new GP practice and is granted full GMS status, the registered GP practice recorded for the patient is updated on the Spine and Spine functionality is enabled immediately

Note 3: Only users with Role-Based Access Control (RBAC) access right B1611 can register patients that have been marked as 'sensitive' on the Spine

No Matches Found

If no existing patients on either SystmOne or Spine match the criteria you have entered, do one of the following:

- Click **Search again** or
- Click **Register new patient** to create a new record

Note: The ability to create a new record on the Spine must be granted to individual organisations by TPP. You will only be allowed to create a new Spine record for patients over three months' old

To register a new patient after no matches were found on SystmOne or the Spine, complete as above:

- Click the buttons down the left hand side of the screen to enter each Registration Item
- Click **OK** when you have completed each item
- When you have completed each of the sections as required, click **OK**
- The patient record is displayed
- Click the **Save** button on the Main Menu when you have finished working in the patient record
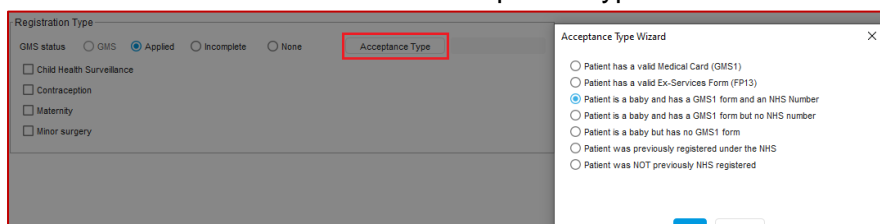
Registering without an NHS Number

If you do not have the patient's NHS number, the minimum information you can enter is:

- Surname
- Gender
- Date of birth (exact or between specified dates)

Note: A birth registration is only generated when you select **'Patient is a baby and has a GMS1 form and an NHS Number'** from the list of acceptance types on the **Patient Care (IOS)** screen
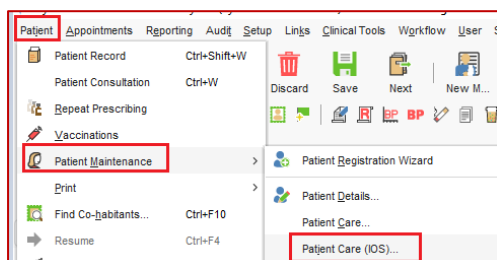
4. Registration Details - Patient Care (IOS)

- Select **Patient** > **Patient Maintenance** > **Patient Care (IOS)** from the Main Menu

This screen allows you to enter or amend details under the following headings:
- **GP Details** – you can amend the Registered or Usual GP.
- **Previous Details** – previous GP information can be entered here.
- **Dispensing**
- **Registration Type** – this will show the GMS status for the patient
- **Rural Details**
- **Others**

5. Maintaining Patient Demographics

To change a patient's name:

- Select **Patient** > **Patient Maintenance** > **Patient Details** from the Main Menu
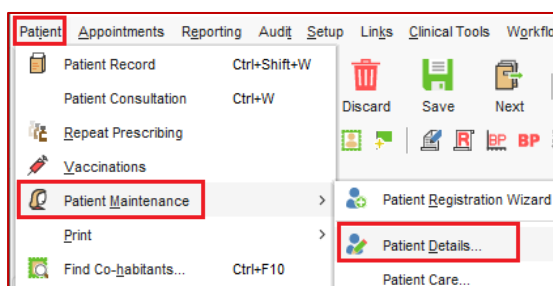
- Over-type the previous surname with the new one. Press the tab key or click in another field, the previous surname will be displayed in the **Former Surname** field and. If the patient already has a former surname recorded, you will be asked to choose which former surname is displayed
- Click **OK**

To add a new address/telephone

- Select **Patient** – **Patient Maintenance** – **Record New Address** from the Main Menu
  The Address Type Selection dialog is displayed

- Select the type of address you want to add
- Record the patient's address

If you have a postcode:
- Type in the house number and postcode and click **Find**. The remaining address fields will be completed automatically

If you have the first half of the postcode:
- Type in the partial details and click **Find**. SystmOne will prompt you to enter the road name and will offer a list of possibilities

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- Select the correct address and click **OK**

If you do not have the postcode or do not know how to spell part of the address:

- Click **Find**, then click **Yes** to confirm you do not have the postcode
- Next, type in the details you have and click **Suggest** to view a list of possibilities.
  Tip: Provide basic details first, for example the first part of the road name and the town ("Mary" and "London"); if too many suggestions are offered, you can then search the results or add more details.

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If you cannot find the correct address:

- Click **Add** to enter it manually (you must have clicked **Find** first to activate the Add button)

- Type any **Comments**, if applicable
- Select **This is a new address**
- Specify how you want the details you have entered to be used by SystmOne:

- Select **Use this address in the patient search**, if you want the address you have entered to appear in the Quick Patient Search/Patient Locator
- Deselect **Use this address for correspondence** if appropriate
- Select a **Residential code** from the drop-down list, if applicable
- Add any telephone numbers you want to record and select **Preferred number** to specify which telephone number you want to appear in the Quick Patient Search/Patient Locator and to appear first in the Patient Demographics Box
- Type in the patient's **Email address**, if known
- Select the patient's preferred method of communication from the **Preferred method** drop-down list or select '**No Communication**' if the patient does not want to receive any kind of message
- Click **OK** when you have completed all required details

To change a patient's date of birth:

- Select **Patient** – **Patient Maintenance** – **Patient Details** from the Main Menu.
- Amend the date of birth as required.
- Click **OK** to save the changes.

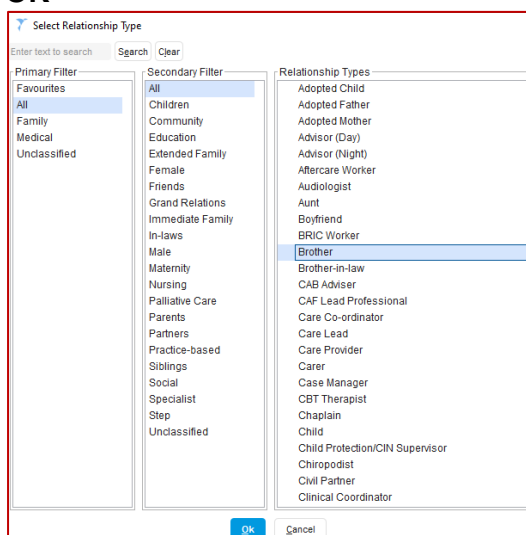To record details of a patient's next of kin:

- Retrieve the patient record
- Click the **Administrative** tree tab
- Select the **Groups & Relationships** node
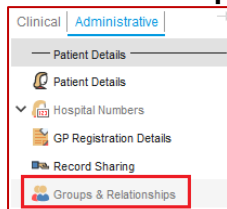
- Right click on the **Groups & Relationships** node and select **Record Relationship**
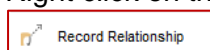
- **Select Relationship Type** from the lists displayed, using the Filter columns as required and click **OK**

- Select from the **Record a relationship with** option and click **OK**

In the example shown, the NOK is a patient registered at the same practice

- Search for this patient

- Select **Next of Kin** and complete the remaining fields as required, then click **OK**

Details of Relationships are displayed in the lower pane of the Groups & Relationships view

To edit an existing relationship:

- Right click on the relationship
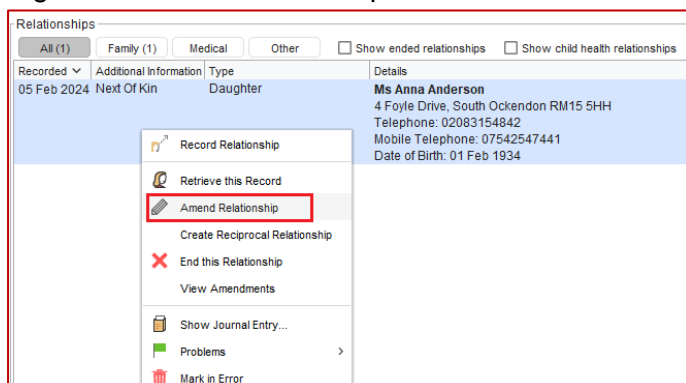
- Select **Amend Relationship**
- Amend the relationship fields as required and click **OK**

Always remember to click the **Save** button on the Main Menu when you have finished working in the patient record, to save the changes you have made

- Note: All baby and child registrations should be linked to the person with parental responsibility; parent/carer/guardian etc. if that person is also registered at your practice, by recording their details as above
- **Administrative** tree tab
- Select the **Groups & Relationships** node
- **Record Relationship**

    The child should also be added in **Record Relationship** of the person with parental responsibility for them

6.   Adopted patients

Current adoption legislation requires that all adopted patients are given a new NHS number, and that all previous medical information relating to the patient is put into a newly created medical record. Any information relating to the identity or whereabouts of the birth parents should not be included in the new record.

Please refer to the Primary Care Support England - PCSE links here:

Adoptions and Gender Reassignment | PCSE

Adoption and gender reassignment processes | PCSE

Adoption Medical Records - Practice Guide | PCSE

7.   Transgender patients

Patients may request to change gender on their medical record at any time and do not need to have had any form of gender reassignment treatment in order to do so.

When a patient changes gender, the current process on NHS systems requires that they are given a new NHS number and must be registered as a new patient at your practice. All previous medical information relating to the patient needs to be transferred into a newly created medical record. The patient's previous name and any gender specific terms and previous NHS number should be removed.
When the patient informs the practice that they wish to register their new gender on the clinical system, the practice must inform the patient that this will involve a new NHS number being issued for them. Please confirm this has been discussed with the patient when notifying PCSE. The new registration within five working days to avoid interruption to the patient's care.

Please refer to the Primary Care Support England - PCSE links here:

Adoptions and Gender Reassignment | PCSE

Adoption and gender reassignment processes | PCSE

Gender Reassignment - Practice Guide | PCSE

Disclaimer:
To the best of our knowledge and using the available information, this guidance is correct at the time of publishing.

Please do not hesitate to contact us if you have any queries via the IT Service Desk:
Phone: 0203 350 4050 or Email: nhsnwl.servicedesk@nhs.net