



**PCS Scotland**

**GP Links**

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### **Associated documentation**

None

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## 1 Introduction

This guide is designed to help EMIS PCS users in Scotland to use GP Links.

The guide also covers relevant aspects of Registration.

In this section, you will learn:

- About GP Links; see section 1.1 *GP Links: overview* on page 5.
- How to access GP Links; see section 1.2 *Access GP Links* on page 5.

### 1.1 GP Links: overview

Use GP Links to transfer information between your practice and your trading partner (TP), to ensure that the practice and TP patient databases match.

GP Links uses the NHSNet network. Each practice and each TP has its own mailbox, configured in the Communications Settings section of Locations Manager. Before you start to use GP Links, the practice and TP must carry out a reconciliation of patient records, to ensure that the two databases match.

Whenever you register new patients or amend patient details, EMIS PCS sends the information to the TP. Similarly, the TP uses GP Links to send information to your practice about patients on the practice list. Information is usually transmitted to and from the TP once a day. When the TP receives information, the TP database is updated and an appropriate response is sent to your practice mailbox.

### 1.2 Access GP Links

To access GP Links:

- From the main menu, click **GP Links** in the Communications section, or type **GP**.

- From another module, click  beside  on the system toolbar, and select **GP Links** from the drop list.

## 2 Registering new patients and editing registration details

This section covers aspects of Registration related to GP Links.

In this section, you will learn:

- How to access Registration; see section 2.1 *Access Registration* on page 6.
- How to register new patients; see section 2.2 *Register a patient* on page 6.
- About recording organ donor information when registering new patients; see section 2.3 *Recording organ donor information when registering new patients* on page 8.
- Some tips for registering patients; see section 2.4 *Tips for registering patients* on page 9.
- About registration status; see section 2.5 *Registration status* on page 10.
- About registration history; see section 2.6 *Registration history* on page 11.
- How to edit registration details; see section 2.7 *Edit registration details* on page 11.
- How to change the patient (registration) type; see section 2.8 *Change patient type* on page 11.
- How to re-register patients; see section 2.9 *Re-register a patient* on page 11.
- About completing any missing registration data; see section 2.10 *Missing patient registration data* on page 12.
- How to notify PSD of a patient's death; see section 2.11 *Notify PSD of a patient's death* on page 12.

### 2.1 Access Registration

To access Registration:

- From the main menu, click **Registration** in the Administration and Documents section, or type **RD**.
- From anywhere in EMIS PCS, do one of the following:
  - Click  beside  on the system toolbar, and select **Registration** from the drop list.
  - Press **F7**.

### 2.2 Register a patient

1. Access Registration.

The Patient Details screen is displayed.

**Note:** Before you register a patient, make sure you check if a patient has been previously registered using Patient Find and/or Patient Archive. If there is a previous registration for a patient, then you can re-register the patient. For more information see section 2.9 *Re-register a patient* on page 11.

2. Click **New Patient** or press **N** and select the appropriate patient type.

The registration screen for the selected patient type is displayed.

**Note:** When registering regular patients, do *not* complete the Long/Short Stay field.

**Personal details...**

Sex: [dropdown]  
 Surname: [text box]  
 Previous Surname: [text box]  
 Forenames: [text box]  
 Calling Name: [text box]  
 Date of birth: [text box]  
 Title: [text box]  
 Marital Status: [text box]  
 Ethnic Origin: [text box]

**Address details...**

House Name Flat No: [text box]  
 No and Street: [text box]  
 Village: [text box]  
 Town: [text box]  
 County: [text box]  
 Post Code: [text box]

**HA/HB Details...**

Trading partner: [text box]  
 Registered GP: [text box]  
 Usual GP: [text box]  
 NHS Number: [text box]  
 Residential Inst: [text box]  
 Branch Surgery: [text box]  
 NEXT OF KIN: [text box]

**Contact details...**

Home Tel No: [text box]  
 Work Tel No: [text box]  
 Mobile Tel No: [text box]  
 E Mail Address: [text box]

**Practice Information...**

Dispensing: [No] [dropdown]  
 Hospital Number: [text box]  
 Records At: [text box]

**Distances**

Rural Mileage: [text box]  
 Blocked Special: [dropdown]  
 Walking Quarters: [text box]

New Patient (Regular Patient) screen

3. Complete the screen; click a box title or the corresponding box, type the information required, and then press **TAB** to move to the next box.

**Note:** Using the TAB key will ensure that the Presentation Details fields (page 2 of the Registration Details) are activated, enabling you to complete the registration in full.

4. When the cursor is in the Presentation Details box, press **TAB** or **ENTER**.

5. Beside the Presentation Type box, click  and select the appropriate presentation type.

The Presentation Details section for the selected presentation type is displayed at the bottom of the screen.

**Presentation Details**

Presentation type: [Previously Registered with NHS] [dropdown]

**Born outside UK**: [NO] [dropdown]

**Place of Birth**: [text box]

**Previous GP**: [text box]

Previous HA/HB: [text box]

**Previous Address**: [text box]  
 [text box]  
 [text box]

GP Notes: [text box]

None of the following

Armed Service Medical Cover

Date of Enlistment: [text box]

Date of Leaving: [text box]

Returning from Abroad

Date left country: [text box]

Date entered country: [text box]

Previously A Private Patient

Presentation Details section

6. Add the information required for the selected presentation type.

**Note:** You *must* add information in boxes with bold titles. The information required, and the mandatory boxes, depend on the presentation type. You *must* complete this section before you save the registration or an incomplete registration will be created in the GP Links Outbox.

**Note:** Do *not* type in the Previous HA/HB field. You *must* select the Previous Health Authority/Health Board from the drop list, rather than typing the name. If you do not know the previous HA or HB, leave this field blank, as it is *not* mandatory. If you type in this box, it will cause an incomplete registration and you will need to add the presentation details again.

**Tip:** Use the GP Notes box to add relevant information relating to the patient's registration, such as:

- Patient's middle name/s.
  - Patient's maiden name.
  - If you are registering a baby, you may want to include the following:
    - The mother's surname, if it is different.
    - For twins or triplets, add *Baby 1*, *Baby 2* and *Baby 3* to each registration, if order of birth has been given by the parents.
7. To save the new registration, click **File** or press **F8**.

### 2.3 Recording organ donor information when registering new patients

You can only record organ donor information when registering new patients; you *cannot* amend the registration details of existing patients to add organ donor information.

When your health board (HB) accepts the patient's registration, the organ donor information you recorded during registration is transmitted to Practitioner Services (PSD) electronically as part of your scheduled transmissions, for inclusion on the organ donor register. However, organ donor information is *not* added to the patient's medical record, so if you want to record the patient's organ donor intentions for your own future reference, you also need to add an appropriate clinical term (Read code) to the patient's medical record.

#### 2.3.1 Record organ donor information

1. Access Registration.

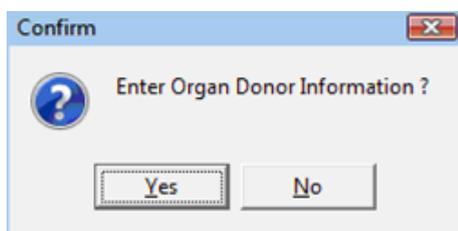
The Patient Details screen is displayed.

2. Click **New Patient** or press **N** and select **Regular**.

A new registration form is displayed.

3. Complete the registration form and the presentation details, and then click **File** or press **F8**.

A confirmation message is displayed.



*Organ Donor Information confirmation message*

4. Click **Yes**.

**Note:** If you click No, the registration process continues in the usual way.

The Organ Donation Information screen is displayed.

*Organ Donation Information screen*

5. To record organ donor information for the patient:
  - a. Select **Organ Donation Consent Entered**.
  - b. In the Donatable Organs section, select **All**, or select the box beside each organ that the patient consents to donate.
  - c. Select **Consent Given on Date**, and then type the date or click  beside the box and use the calendar to select the date. The default is today's date.
  - d. Click **OK**.

The organ donor information is transmitted to PSD when the HB accepts the patient's registration.

## 2.4 Tips for registering patients

### 2.4.1 Tips for completing the Registration screen

The following tips may be useful when you are completing the Registration screen:

- Check if a patient has been previously registered using Patient Find and/or Patient Archive.
- You *must* complete all mandatory boxes (those with bold titles).
- If you do not know the patient's NHS or Community Health Index (CHI) number, leave these boxes blank.
- You *must* select the appropriate trading partner (TP) (HB) from the drop list, rather than typing the name. One or more letters are displayed as the reference for your HB area or, if you are a cross-border site, a number of options are displayed, equivalent to the number of HBs to which you can register patients in your practice.
- To prevent duplicate registrations, a warning message is displayed if you try to register a patient with the same date of birth as another patient already on the practice list.
- If you type the postcode in the Post Code field and then press F4, addresses in the address database associated with that postcode are displayed for you to select.
- If you type part of a name or address and then press F4, similar names and addresses in the address database are displayed for you to select.
- When registering a regular patient, do *not* complete the Long/Short Stay field.

- Double-check the details on the Registration screen are correct, as you should not edit a registration until PSD has approved it. If you edit the registration details are edited during the transmission process, the registration will create an incomplete amendment, and PSD will receive the original registration details only, but not the changes.

### 2.4.2 Tips for completing the presentation details

The following tips may be useful when you are completing the Presentation Details screen:

- To make sure the Presentation Details screen is displayed for you to complete, make sure the Personal Details, Address Details and the HA/HB Details boxes are complete. Using the TAB key through the rest of the screen will prompt the Presentation Details box to appear.
- Press **TAB** or **ENTER** in the Presentation Details box to expand the form and complete this section.  
**Note:** If you do not complete this section, the registration will be incomplete. Incomplete registrations are held back in the GP Links Outbox and *not* transmitted to the TP until completed.
- Always select the appropriate presentation type, to ensure you add the information that the TP requires for this patient type.
- If you select Previously Registered with NHS as the presentation type, make sure that you add the appropriate information on the right-hand side of the screen before filing; for example, if the patient has returned from abroad, you must complete the Date Left Country and Date Entered Country sections (these dates cannot be the same day; they must be at least one day apart).
- Do *not* type in the Previous HA/HB field. You *must* select the Previous Health Authority/Health Board from the drop list, rather than typing the name. If you do not know the previous HA or HB, leave this field blank, as it is *not* mandatory. If you type in this box, it will cause an incomplete registration and you will need to add the presentation details again.
- You *must* complete the Presentation Details section before saving a registration.
- Use the GP Notes box to add relevant information relating to the patient's registration.

### 2.4.3 Tips for completing temporary registrations

The following tips may be useful when you are registering temporary patients:

- When you register temporary residents, type the address where they are staying whilst being treated in the Address Details section, and their home address in the Home Address Details section.
- When you register temporary residents, if you click the Home GP Code box and then click another box, EMIS PCS will automatically add a default GP Code in the Home GP Code box. If this field is not completed, you cannot file the registration.
- If you use the TAB key to move through the fields on the screen, EMIS PCS automatically adds default codes.

## 2.5 Registration status

EMIS PCS updates patients' registration status in response to transactions sent and received using GP Links.

To view the current patient's registration status, click **Status** or press **S** on the main Registration screen. The following table shows possible status descriptions; status changes marked with an asterisk are completed in the Medical Record Box in GP Links.

Status	Meaning
Application Form FP1 Submitted	Practice has sent patient's registration details to TP.
Notification of Registration	TP has accepted patient's registration.

*Medical Records Received	Practice has received patient's notes from TP.
Medical Records Requested	Patient deducted from practice and TP has requested notes.
*Medical Records Sent Back	Practice has sent patient's notes back to TP.
Medical Records Received by FHSA	TP has received patient's notes.

## 2.6 Registration history

To view changes made to the patient's registration details since registration, click **History** or press **H**.

**Note:** The registration history only shows changes made in EMIS PCS, *not* changes made in any previous clinical system.

## 2.7 Edit registration details

1. Select the appropriate patient using Patient Find.
2. Access Registration.
3. On the Patient Details screen, click **Edit Patient** or press **E** and select **Edit Registration**.

The original registration screen for the selected patient is displayed.

4. Edit the details as necessary.

**Important:** If you edit the patient's date of birth, the CHI number will be removed. For this reason, if you are changing both the CHI number and the date of birth, you need to make a note of the CHI number *before* you edit the date of birth, as you will need the current CHI number to amend the details in GP Links. For information on how to amend a CHI number, see section 5.8 *Amend a CHI number* on page 26.

**Note:** You *cannot* change the TP in Registration. To change the TP, deduct the patient and then re-register them with the correct TP (for further details, see section 3 *Cross-border registrations* on page 13).

5. Click **File** or press **F8**.

If you have edited the patient's address, you are prompted to edit the details of any other members of the household.

## 2.8 Change patient type

To register a former patient as a temporary resident, or change a temporary resident to a regular patient, click **Edit Patient** or press **E** on the Patient Details screen, point to **Change Patient Type**, and then select the appropriate patient type. If the patient's registration has expired or they have been deducted, you can edit their details before filing.

You can register new patients as Appointment Only, to enable you to book appointments, consult and prescribe for the patient, and then change the patient type to Regular at the next convenient opportunity or after the new patient medical appointment. This means that a patient can be registered in EMIS PCS at their first point of contact with the practice, without the need for the practice to input all the required registration details immediately and the patient to wait or make a return visit to register before making an appointment.

## 2.9 Re-register a patient

**Note:** You can only re-register patients who have been deducted. You can also use this procedure to re-register previous temporary residents as regular patients.

1. Select the appropriate patient using Patient Find.

**Note:** Patients who have been deducted and previous temporary residents are displayed in blue text.

2. Access Registration.
3. On the Patient Details screen, click **Edit Patient** or press **E** and then select **Re-register**.

The original registration screen for the selected patient is displayed.

4. Edit the details as necessary, and then click **File** or press **F8**.

**Tip:** You can also reactivate archived patients in Patient Archive.

### 2.10 Missing patient registration data

There is only one field in EMIS PCS to record patients' forenames and middle name(s) at the point of registration. On the practice database, they are usually separated by placing a space or comma between the forename and any middle name(s). However, during transmission to e-Links, EMIS PCS delimits this field by using the space/comma characters as a trigger to move the names into individual fields, which e-Links cannot process; for this reason, not all middle names are transmitted to PSD.

**Tip:** To inform PSD of a patient's middle name/s, add them to the GP Notes box during registration.

You need to record the additional data from the GPR form or from information received from the patient or their previous GP practice. Unfortunately, this will result in an amendment being generated and erroneously sent to the practice to insert the middle name (information which the practice already has). Practices were often unaware that this information was not transmitted electronically and queried why they received this duplicate data.

You also need to be careful when processing registrations for family members who share the same forename and surname, but who are known by their middle name: to overcome this problem, use the Calling Name field.

### 2.11 Notify PSD of a patient's death

1. Select the appropriate patient using Patient Find.
2. Access Registration.
3. On the Patient Details screen, click **Edit Patient** or press **E** and then select **Edit Registration**.

The original registration screen for the selected patient is displayed.

4. In the Address Details section, type a full stop or abbreviate the patient's address, e.g. change Street to St.
5. Click **File** or press **F8**.
6. In the Notes box, type that the patient has died and add any other relevant information about the patient's death.
7. Click **OK**.

A death notification transaction is sent to PSD. PSD will action this transaction, which will result in a deduction in your GP Links Inbox.

## 3 Cross-border registrations

The information in this section is only relevant to cross-border practices.

When a patient moves from one HB area to another but continues to be a patient of the practice, it is appropriate to fully deduct and then re-register the patient, selecting the correct HB.

If you change the patient's address using the Edit Registration function in Registration, an amendment is generated and sent to PSD. You still need to deduct the patient manually and then re-register the patient with the correct HB.

In this section, you will learn:

- How to manually deduct patients who have moved HB area but are still registered at the practice; see section 3.1 *Manually deduct a cross-border patient* on page 13.
- How to process deductions for cross-border patients issued by PSD; see section 3.2 *Process a deduction from PSD* on page 13.
- How to re-register patients with the correct HB; see section 3.3 *Re-register a patient with the correct HB* on page 14.

### 3.1 Manually deduct a cross-border patient

1. Access GP Links.

2. Click **Outbox** or press **O**.

The GP Links Outbox screen is displayed.

3. Click **Options** or press **P**, point to **Security Changes**, and then select **Deduct Patient**.

The Patient Find screen is displayed.

4. To find the correct patient, do one of the following:

- Select the appropriate patient, and then click **OK**.
- In the Search Criteria box, type the patient number, and then click **OK**.

A confirmation message is displayed.

5. Click **Yes**.

The Deduct Patient screen is displayed.

6. Click beside the Reason box and select the appropriate deduction reason.

7. Click **OK**.

A confirmation message is displayed.

8. If you do not want to deduct another patient, click **No**.

The patient is deducted. You now need to re-register the patient with the correct HB, following the instructions in section 3.3 *Re-register a patient with the correct HB* on page 14.

### 3.2 Process a deduction from PSD

1. Access GP Links.

2. In the lower pane of the GP Links Inbox screen, click **Deductions** or press **D**.

Deductions from your TP/PSD are displayed.

3. Double-click the required deduction, or right-click the deduction and select **Review**.

The Incoming Deductions screen is displayed, showing details of the deduction.

4. To accept the deduction, click **Accept**.

The patient is deducted. You now need to re-register the patient with the correct HB, following the instructions in section 3.3 *Re-register a patient with the correct HB* on page 14.

### 3.3 Re-register a patient with the correct HB

**Note:** You can only re-register patients who have been deducted. You can also use this procedure to re-register previous temporary residents as regular patients.

1. Select the appropriate patient using Patient Find.
2. Access Registration.

The patient details are displayed in blue text, with a warning message advising that the patient has left.

3. To clear the message, click **Yes**.
4. On the Patient Details screen, click **Edit Patient** or press **E** and select **Re-register**.

The original registration screen for the selected patient is displayed.

5. In the Trading Partner field, select the HB that the patient should now be registered with.
6. Complete the screen: click a box title or the corresponding box, type the information required, and then press **TAB** or **ENTER** to move to the next box.

**Note:** Using the Tab Key will ensure that the Presentation Details fields (page 2 of the Registration Details) are activated, enabling you to complete the registration in full.

'Yes' is displayed in the Presentation Details box.

7. Press **TAB** or **ENTER** while the cursor is in this box.
8. Click  beside the Presentation Type box and select the appropriate presentation type.

The Presentation Details section for the selected presentation type is displayed at the bottom of the screen.

9. Add the information required for the selected presentation type.

**Note:** You *must* add information in boxes with bold titles.

10. Click **File** or press **F8**.

## 4 GP Links Outbox

In this section, you will learn:

- About the GP Links Outbox; see section 4.1 *GP Links Outbox: overview* on page 15.
- About unacknowledged transactions; see section 4.2 *Unacknowledged transactions* on page 15.
- About unlinked transactions; see section 4.3 *Unlinked transactions* on page 18.
- About incomplete transactions; see section 4.4 *Incomplete transactions* on page 18.

### 4.1 GP Links Outbox: overview

Transactions in the GP Links Outbox are displayed in the following sections:

Section	Contains
G – New Registrations	Registration information for new patients.
A – Amendments	Amendments made to patients' registration details after the TP accepts them onto the practice list.
V – Removals (not Scottish practices)	Patients to be removed from the practice list because they have moved out of the practice area.

Within each section, the status of each transaction is indicated by one of the following icons:

Status	Indicates
 Ready to Send	Information to be sent to PSD in the next transmission.
 Unacknowledged	Information sent to PSD, but not yet acknowledged by PSD.
 Unlinked	The e-links transmission is broken and nothing is being sent electronically to PSD. Contact EMIS Support to check the transmission links.
 Incomplete	Registrations needing further information before they can be sent to PSD.

Every day, you should:

- Check there are no Ready to Send transactions from the previous day.
- Check for any unacknowledged transactions that are more than one week old. If there are any, contact PSD to check that they have received the information. If PSD has not received the information, refer to section 4.2.1 *Deal with an unacknowledged patient* on page 16.
- Complete the presentation details for any incomplete new registrations; refer to section 4.4.1 *Edit an incomplete registration* on page 19.

### 4.2 Unacknowledged transactions

When a patient is first registered at a practice, their details are transmitted to PSD. PSD reviews the details and decides if the patient should be registered with them or not.

Unacknowledged patients are simply patients whose registration at the practice has not yet been approved by PSD. While patients are awaiting approval, their records *cannot* be altered. The Edit option is removed and Awaiting Confirmation is displayed in red text in the Status section. This means the record is 'frozen' and will remain so until PSD acknowledges the registration.

If PSD approves a registration, an acknowledgement message is sent to the practice system. You cannot view this message in EMIS PCS, but it removes the freeze flag from the patient's record and automatically updates their registration status (to Notification of Registration).

PSD can take up to seven days to send approval and rejection messages. If transactions remain as unacknowledged for more than seven days, follow the procedure in section 4.2.1 *Deal with an unacknowledged patient* on page 16.

In addition, sometimes practices do not receive the PSD approval message for some patients, so those patients remain as unacknowledged. In this case you need to approve the patients manually; see section 4.2.2 *Manually approve an unacknowledged patient* on page 16.

### 4.2.1 Deal with an unacknowledged patient

1. Contact PSD and confirm that PSD has received and accepted the patient's registration.
2. If PSD has received and accepted the patient's registration, approve the patient manually; see section 4.2.2 *Manually approve an unacknowledged patient* on page 16.
3. If PSD has *not* received the patient's registration:
  - a. If the patient has a CHI number, approve the patient manually; see section 4.2.2 *Manually approve an unacknowledged patient* on page 16.
  - b. Deduct the patient; see section 4.2.3 *Deduct an unacknowledged patient* on page 16.
  - c. Re-register the patient; see section 4.2.4 *Re-register an unacknowledged patient* on page 17.

### 4.2.2 Manually approve an unacknowledged patient

1. Access GP Links.
2. Click **Outbox** or press **O**.

The GP Links Outbox screen is displayed.
3. Click **Options** or press **P**, point to **Security Changes**, and then select **High Security Approval**.

The High Security Approval screen is displayed, showing patients who have not yet been accepted onto the practice list.
4. Select the appropriate patient, and then click **OK**.

A confirmation message is displayed.
5. Type the patient's CHI number, and then click **OK**.

**Note:** You may need to ask PSD for the CHI number at this stage.

The patient is accepted onto the practice list and their registration status is updated to Notification of Registration.

**Note:** If a warning is displayed, stating that the CHI number is already attached to another record, follow the instructions in section 4.2.5 *Removing CHI numbers from duplicate records and adding to the current record* on page 17. You can then manually approve unacknowledged patients, as above.

### 4.2.3 Deduct an unacknowledged patient

1. Access GP Links.
2. Click **Outbox** or press **O**.

The GP Links Outbox screen is displayed.
3. Click **Options** or press **P**, point to **Security Changes**, and then select **Deduct Patient**.

The Patient Find screen is displayed.

4. To find the correct patient, do one of the following:
  - Select the appropriate patient, and then click **OK**.
  - In the Search Criteria box, type the patient number, and then click **OK**.  
A confirmation message is displayed.
5. Click **Yes**.  
The Deduct Patient screen is displayed.
6. Click  beside the Reason box and select the appropriate deduction reason.
7. Click **OK**.  
A confirmation message is displayed.
8. If you do not want to deduct another patient, click **No**.  
The patient is deducted.
9. Contact EMIS Support to ask them to remove the unacknowledged patient from the GP Links Outbox.

#### 4.2.4 Re-register an unacknowledged patient

1. Access Registration.  
The Registration – Patient Details screen is displayed.
2. Press **F5**.  
The Patient Find screen is displayed.
3. Select the appropriate patient, and then click **OK**.  
**Note:** You can only re-register a patient who has been deducted.  
A message is displayed, stating that the patient has left.
4. Click **Yes** to continue.
5. On the Patient Details screen, click **Edit Patient** or press **E** and select **Re-register**.  
The original registration screen for the selected patient is displayed.
6. Edit the details as necessary.
7. Click **File** or press **F8** to save the changes.  
A confirmation message is displayed.
8. Click **OK**.

#### 4.2.5 Removing CHI numbers from duplicate records and adding to the current record

In certain circumstances you may need to remove the CHI number from a deducted duplicate record when the current record is in the Unacknowledged section of the GP Links Outbox. You *must* remove the CHI number from the deducted record and add it to the current record, using the following procedure, before you can action the Unacknowledged transaction.

1. Select the appropriate patient using the CHI number in Patient Find.  
**Note:** If a duplicate record (displayed in blue text) is not returned, you can reactivate the patient in Patient Archive.
2. Access Registration.
3. Make a note of the patient's patient (EMIS) number.

4. Click **Edit Patient** or press **E**, point to **Change Patient Type** and select **Appointment Only**.  
The Registration screen for the patient is displayed.
5. Make a note of the patient's CHI number, and then remove the CHI number and NHS number completely.
6. Click **Edit Patient** or Press **E**, point to **Registration Status** and click **Registration Expired**.
7. Type today's date, and then click **OK**.
8. In the GP Links Outbox, click **Options**, point to **Security Changes**, and then select **High Security Approval**.

The High Security Approval screen is displayed, showing patients who have not yet been accepted onto the practice list.

9. Select the appropriate patient, and then click **OK**.

A confirmation message is displayed.

10. Type the patient's CHI number, and then click **OK**.

**Note:** You may have to ask PSD for the CHI number at this stage.

The patient is accepted onto the practice list and their registration status is updated to Notification of Registration. You can then archive the duplicate record, for more information see section 6.5 *Archive a duplicate record* on page 30.

### 4.3 Unlinked transactions

Unlinked transactions have been added to EMIS PCS, but the appropriate TP is not linked electronically and the transmission between the practice and PSD has failed.

In this case, you need to contact EMIS Support, who will check the practice e-links transmissions.

**Note:** If you are a cross-border practice, contact EMIS Support to make sure the communication links for both HBs have been set up.

### 4.4 Incomplete transactions

Incomplete registrations are held back in the GP Links Outbox and *not* transmitted to PSD because the presentation details have not been completed or have been completed incorrectly when you registered the patients.

The following tips may be useful to help you to make sure you complete the presentation details when registering patients:

- To ensure the Presentation Details section is displayed, you *must* complete the following sections:
    - Personal Details
    - Address Details
    - HA/HB Details
- Note:** If you use the TAB key to move through the registration form, the Presentation Details section will be displayed.
- If you select Previously Registered with NHS as the presentation type, make sure you add the appropriate information on the right-hand side of the screen before filing. For example, if the patient has returned from abroad, you must complete the Date Left Country and Date Entered Country sections: these dates cannot be the same day; they must be at least one day apart.
  - You can leave the previous HA or HB blank or select from the drop list. If you do not know the previous HA or HB, leave this field blank; do *not* type in this field, as it will cause an incomplete

registration which will be held back in the GP Links Outbox and not transmitted to PSD and will require the information to be completed again.

#### 4.4.1 Edit an incomplete registration

1. Access GP Links.
2. In the Outbox, select the required transaction.  
**Note:** An icon  is displayed beside incomplete transactions.
3. Right-click the transaction and select **Edit Incomplete**.
4. In the Presentation Type field, select the type of registration.
5. Complete the form.
6. Click **OK**.

The transaction status changes from Incomplete to Ready to Send.

**Note:** If the Edit Incomplete option is greyed out, see section 4.5 *Incomplete amendments* on page 19.

#### 4.5 Incomplete amendments

Incomplete amendments are created when you edit new registrations before PSD has approved them.

If you edit the registration details during the transmission process, the registration creates an incomplete amendment and PSD will only receive the original registration details, but *not* the changes.

To check what change was made, double-click the incomplete amendment. Make a note of the change, as you may need to make it in the patient's registration details again when the registration status is updated after the registration is accepted.

##### 4.5.1 Remove an incomplete amendment

**Important:** Only a system administrator, a practice manager or IT manager should use this procedure, and they *must* complete each step. Alternatively, you can contact EMIS Support or your local IT helpdesk to ask them to remove incomplete amendments. If you choose to do this, you need to send the request in a fax signed by the practice manager, including the patient's EMIS number, the EMIS customer reference (ECR) number for the call and your practice customer database (CDB) number. If you use the procedure below, make a note of the patient's EMIS number, as you will need it later in the process.

1. From the EMIS PCS main menu, click **Locations Manager** in the Configuration section, or type **LM**.
2. Right-click the appropriate HB and select **Edit Location Details**.  
**Note:** If you are a cross-border practice, select the HB the patient is registered with.
3. Click the **Communication** tab.
4. Click **Edit**.
5. Clear the boxes beside the three options on the screen displayed.
6. Click **OK**.
7. On the Location Settings screen, click **OK**.
8. Access GP Links.
9. Click **Options** and select **Print Unlinked**.

A screen is displayed, showing all unlinked transactions.

10. Select the appropriate HB and GP for the patient that the incomplete amendment relates to.

11. Click **View**.

12. Click the Print icon.

13. On the Printer selection screen, click **Cancel**.

A confirmation message is displayed, asking if the print was successful.

14. Click **Yes**.

A message is displayed, asking if you want to save to file.

15. Click **No**.

A message is displayed, asking if you want to delete the transaction.

16. Click **Yes**.

**Note:** This will only delete the selected incomplete amendment.

17. Access Locations Manager.

18. Right-click the appropriate HB and select **Edit Location Details**.

**Note:** If you are a cross-border practice, select the HB the patient is registered with.

19. Click the **Communication** tab.

20. Click **Edit**.

21. Select the boxes beside the three options on the screen displayed.

22. Click **OK**.

23. On the Location Settings screen, click **OK**.

In GP Links, the incomplete amendment is removed from the Outbox.

## 5 GP Links Inbox

In this section, you will learn:

- About the GP Links Inbox; see section 5.1 *GP Links Inbox: overview* on page 21.
- About processing amendments; see section 5.2 *Process an amendment* on page 21.
- About processing deductions; see section 5.3 *Process a deduction* on page 22.
- About rejections; see section 5.4 *Rejections* on page 23.
- About deduction rejections; see section 5.5 *Deduction Rejections* on page 23.
- About uploads; see section 5.6 *Uploads* on page 23.
- About unmatched transactions; see section 5.7 *Unmatched* on page 24.

### 5.1 GP Links Inbox: overview

Transactions in the GP Links Inbox are displayed in the following sections:

Section	Contains
A – Amendments	Changes to patients' records received from PSD.
J – Rejections	Rejected registrations.
D – Deductions	Patients to be deducted from the practice list, sent by PSD.
E – Deduction Rejections	Not applicable in Scotland.
U – Uploads	Not applicable in Scotland.
N – Unmatched	Transactions that EMIS PCS cannot match to patients on the practice list.

Amendments and deductions are transactions that HBs send to update or remove patient registrations:

- Amendments are sent to update patient registrations, for example, name, address, CHI number.
- Deductions are sent to remove patients from the practice list.

Double-click a transaction in the GP Links Inbox to view its details.

You should process transactions in the GP Links Inbox every day. Double-click or right-click a transaction and select **Review**; a message at the bottom of the screen displayed tells you how to process the transaction. Use the following table as a guide to the options available on this screen, which depend on the type of transaction.

Type of transaction	Option(s) available or action to take
Amendments	Accept, Reject, Out of Area (to request a removal).
Rejections	Accept, Re-Register (if the wrong TP was originally added).
Deductions	Accept, Reject.
Deduction Rejections	Not applicable in Scotland.
Uploads	Not applicable in Scotland.
Unmatched	Carry out the required action for unmatched transactions. For more information, see section 5.7 <i>Unmatched</i> on page 24.

### 5.2 Process an amendment

1. Access GP Links.

2. In the lower pane of the GP Links Inbox screen, click **Amendments** or press **A**.  
Amendments from your TP are displayed.
3. To view details of an amendment, double-click it, or right-click it and select **Review**.  
The Incoming Amendments screen is displayed, showing details of the change(s) required.
4. If you want to view the patient's registration details to help you decide how to process the amendment, click the **Patient Details** tab at the top of the screen.
5. Do one of the following:
  - To accept the amendment, click **Accept**.
  - To reject the amendment, click **Reject**.

### 5.3 Process a deduction

**Important:** Deductions should be accepted as they arrive, on a daily basis. If you accept a deduction, this does *not* remove or delete the notice to deduct, but only changes the colour of the patient's details in Patient Find (i.e. if a patient dies, their registration details are displayed in red text, and if a patient leaves, their details are displayed in blue text). The benefit of accepting deductions quickly is that risks are reduced within the practice: a warning message is displayed if practice staff access the records of patients who have left or died, preventing appointments from being booked, prescriptions from being issued and chronic disease recall letters from being sent to these patients. When you accept a deduction, its details are moved from the Inbox to the Medical Record Box and held in the FP22 Reminders section until the deduction process (see below) is complete.

1. In the lower pane of the GP Links Inbox screen, click **Deductions** or press **D**.  
Deductions from your TP are displayed.
2. To view details of a deduction, double-click it, or right-click it and select **Review**.  
The Incoming Deductions screen is displayed, showing details of the deduction.
3. Do one of the following:
  - To accept the deduction, click **Accept**.  
The patient's details are displayed in blue text if the patient has left, or red text if the patient has died. You now need to place the patient's paper medical record in the PSD courier bag and transfer the electronic medical record from EMIS PCS to Docman (see section 5.3.1 *Export an accepted deduction to Docman* on page 22).
  - To re-register the patient, click **Re-register**.  
**Note:** Cross-border practices only need to re-register patients if they were registered to an incorrect HB, or if they are changing HB but staying with the practice.

#### 5.3.1 Export an accepted deduction to Docman

1. Select the required patient.
2. From the EMIS PCS main menu, click **Medical Record** in the Medical Records section, or type **MR**.  
**Shortcut:** Press **F11**.
3. Click **Print/Export** or press **N** and select **Defined**.  
The Print Options screen is displayed, showing the summary items available.
4. Select all items you want to include (i.e. make sure a red tick is displayed in the box beside each item).

5. Click **Print**.  
The Print screen is displayed.
6. Click **Yes** to print the full record including imported laboratory items.  
The Printer summary box is displayed.
7. Select the image writer or virtual printer.
8. Save the document, making sure the file extension is .xml.
9. Click and drag the document from where it is saved, and then drop it into the Drop a Document file and complete the filing details in Docman.
10. Follow previous Docman instructions to export the patient documents from Docman.
11. In EMIS PCS, access GP Links.
12. Click **Medical Record Box** or press **R**.
13. Click **FP22 Reminders**.
14. Right-click the required deduction and select **Send Medical Records**.
15. Type the correct date.
16. Click **OK**.  
A confirmation message is displayed.
17. Click **Yes**.

## 5.4 Rejections

If you receive a rejection transaction, you need to discuss it with PSD before processing. In some cases, rejections can occur because you are a cross-border practice that registers patients to more than one HB, and a new patient registration has been sent to the wrong HB. If this is the case, you can re-register the patient, making sure you select the correct HB/TP.

**Note:** If you accept a rejection, this will remove the patient from the practice list. If you contact PSD to query a rejection and PSD informs you that the patient is fully registered to your practice, do *not* click Accept or Re-Register in the Rejection transaction, but contact EMIS Support to have the rejection removed. However, if the rejection is correct, process it using the following procedure.

1. In the lower pane of the GP Links Inbox screen, click **Rejections** or press **J**.  
Rejections from your TP are displayed.
2. Right-click the required rejection and select **Review**.  
The Incoming Rejections screen is displayed, showing the reason for the rejection.
3. Do one of the following:
  - To re-register the patient, click **Re-Register**.
  - To remove the patient from the practice list, click **Accept**.

## 5.5 Deduction Rejections

Deduction rejections are not applicable in Scotland.

## 5.6 Uploads

Uploads are not applicable in Scotland.

## 5.7 Unmatched

When a transaction is received in GP Links, EMIS PCS tries to match it to a patient in your database, either by CHI number or transaction number. If EMIS PCS cannot do this, an unmatched transaction is the result. You need to check unmatched transactions regularly.

The following table shows the usual reason(s) for transactions being unmatched, and the following sections provide information on how to process unmatched transactions.

Type of transaction	Reason for being unmatched
Deduction	CHI number has failed to match, or there is a duplicate record with the same CHI number.
Amendment	CHI number has failed to match.
Medical Record Received Flag	Error matching the transaction to a patient deducted from your list.
Medical Records Sent	CHI number has failed to match.
Approval	Transaction number of the approval has not matched. The patient may be in the Awaiting Acknowledgement section or may have already been approved.

### 5.7.1 Process an unmatched deduction

1. Check which patient is to be deducted, using the CHI number.  
If the patient has multiple records, archive the already deducted record, after removing the CHI number from the duplicate record. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.
2. Contact PSD to check that the current record for the patient is to be deducted.
3. In GP Links, click **Options** or press **P**, point to **Security Changes**, and then select **Deduct Patient**.
4. Type the date of the deduction and the reason for the deduction (e.g. cause of death).
5. Find and select the required patient.  
The selected patient's record is deducted and their details are displayed in blue text.
6. Right-click the unmatched transaction and select **Delete Unmatched**.
7. When the patient's records are ready to be sent to PSD, update the patient's status manually in Registration: click **Edit Patient** or press **E**, point to **Registration Status**, and then select **Records Returned to HA**.

**Note:** Before you archive the patient, make sure that you have summarised all required information from the duplicate record into the current record. For more information, see section 6.3 *Merge duplicate records* on page 29.

### 5.7.2 Process an unmatched amendment

1. Check which patient is to be amended, using the CHI number.  
If the patient has multiple records, archive the already deducted record, after removing the CHI number from the duplicate record. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.
2. Check the details of the amendment by right-clicking and selecting **Detailed Review**.
3. Make a note of the change of details.
4. In Registration, click **History** or press **H**, and check whether the change has already been made.

5. If the details need to be changed:
  - a. Click **Edit Patient** or press **E** and select **Edit Registration**.
  - b. Amend the details as required.
  - c. Click **File** or press **F8** to save the changes and send an amendment back to PSD (displayed in the GP Links Outbox).
6. In GP Links, delete the unmatched transaction.

### 5.7.3 Process an unmatched Medical Record Received Flag transaction

1. In GP Links, remove the Medical Records flag from the patient through high security (**Options, Security Changes, Remove Medical Records Flag**).
2. Check which patient the transaction relates to, using the CHI number.
3. If the patient has multiple records, archive the already deducted record, after removing the CHI number from the duplicate record. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.

The unmatched transaction is removed when the next transmission takes place.

4. In GP Links, delete the unmatched transaction.

### 5.7.4 Process an unmatched Medical Records Sent transaction

1. Check which patient is to be amended, using the CHI number.
2. If the patient has multiple records, archive the already deducted record, after removing the CHI number from the duplicate record. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.

The unmatched transaction is removed when the next transmission takes place.

3. In GP Links, right-click the unmatched transaction and select **Delete Unmatched**.

### 5.7.5 Process an unmatched approval

1. If the patient has already been approved, delete the unmatched transaction in GP Links.
2. If the patient is in the Awaiting Acknowledgement section:
  - a. In GP Links, click **Options** or press **P**, point to **Security Changes**, and then select **High Security Approval**.

The High Security Approval screen is displayed, showing patients who have not yet been accepted onto the practice list.
  - b. Select the appropriate patient, type the CHI number, and then click **OK**.
  - c. In Registration, update the patient's registration status.
  - d. In GP Links, delete the unmatched transaction.

If the patient has multiple records, archive the already deducted record, after removing the CHI number from the duplicate record. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.

## 5.8 Amend a CHI number

**Important:** You *must* check with PSD before amending CHI numbers.

1. Access GP Links.
2. Click **Options** or press **P**, point to **Security Changes**, and then select **Amend CHI Number**.  
A warning message may be displayed, reminding you to check with your HB/PSD before using this option.
3. Click **OK**.  
The Patient Find screen is displayed.
4. Select the required patient, and then click **OK**.  
The Amend CHI Number screen is displayed.
5. In the New CHI Number box, type the CHI number, and then click **OK**.  
The patient's CHI number is amended, and a message is displayed, asking if you want to amend another patient's CHI number.
6. Click **Yes** or **No**, as appropriate.

## 6 Duplicate CHI numbers

In this section, you will learn how to:

- Identify duplicate patients on your practice list; see section 6.1 *Identify duplicate patients* on page 27.
- Remove the CHI number from duplicate records; see section 6.2 *Remove the CHI number from a duplicate record* on page 28.
- Merge duplicate records; see section 6.3 *Merge duplicate records* on page 29.
- Deduct duplicate records; see section 6.4 *Deduct a duplicate record* on page 29.
- Archive duplicate records; see section 6.5 *Archive a duplicate record* on page 30.

### 6.1 Identify duplicate patients

GPASS to EMIS PCS migrations often bring across duplicate records, which you can archive.

A good starting point is to identify duplicate records with CHI numbers, as these often cause GP Links transactions to be unmatched. For example, if PSD sends a deduction notification for a patient who was registered elsewhere, EMIS PCS tries to select the record for deduction, but cannot do so because more than one record matches the patient's CHI number.

To identify duplicate patients, you need to produce a list of patients who have more than one record with the same CHI number, using the following steps:

1. Run a search for all patients.
2. Run a report based on the search to find CHI numbers.
3. Use Microsoft Excel functionality to identify duplicates.

If you archive duplicate patient records, only the current record or most recently deducted record will be found in searches and be available for selection in Patient Find. This reduces any patient safety risk, because the practice will always be using the most up to date, factually correct record.

#### 6.1.1 Run a search for all patients (including those left or dead)

1. From the main menu, click **Searches and Reports** in the Searches and Reports section, or type **ST**.
2. Click **Search Population Manager** or type **SM**.
3. Click an existing folder, or create a new folder.
4. Right-click the folder and select **New Population**.
5. Double-click **All Patients (including those left or dead)**.
6. Click **OK** to run the search.
7. Type a name for the search.
8. Click **OK** to run the search now.

#### 6.1.2 Run a report to find patient CHI numbers

1. Right-click the search you have just created and select **Run Report**.  
The Search Population Reporting screen is displayed.
2. Click  beside Report Type and select **Defined Patient Summary**, and then click **Create New** at the bottom of the screen.  
The report wizard is displayed.
3. Click **Next**.

4. On the screen displayed, select the elements of the patient record that you want to include in the report. For the purposes of this report, select **Registration Details**, including CHI Number.
5. On the next two screens, click **Next** to keep the default settings.
6. On the Report Output screen, select **Text**.
7. Click **Next** and then **Next** again to confirm the Report Output options.

The report runs.

**Note:** This may take several minutes, because of the volume of patients included in the report.

8. When the report has run, click **Finish** to view the report.  
**Note:** At this stage the output is unusable for the required purpose, so close the report screen.
9. Click **EMIS Reporting**, and then click the **Files** tab.
10. Click **Excel** to open the report as a .csv file.

### 6.1.3 Use the Microsoft Excel COUNTIF function to identify duplicates

1. Delete the report output details in the first few rows, and then expand the columns to view all data in the Excel spreadsheet.
2. Create a new header for the COUNTIF formula.
3. Scroll to the bottom of the Excel spreadsheet and make a note of the row number that the data runs to.

**Note:** This will be the total number of patient records plus 1 (because the headings take up row 1).

4. Type the formula **=COUNTIF(\$A\$2:\$A\$xxxx, A2)**, where xxxx is the last row number.

**Note:** The \$ symbols allow the cell formula to be copied to other cells without dynamic change of the cells to reference.

5. Highlight cell **F2** and drag to the bottom of the last row of data, and then press **CTRL+D** to perform Fill-Down.
6. Apply AutoFilter (Data menu, Filter, AutoFilter).
7. Apply the filter for occurrences of 2, 3, 4 and so on, and then copy and paste the patient details from each filter into a separate spreadsheet to create a list of patients that you can use to start the process of merging records, before eventually archiving the duplicate records.

### 6.2 Remove the CHI number from a duplicate record

**Note:** If you archive duplicate records, you should remove the CHI number from a duplicate record before archiving. These instructions are also useful if you do not archive duplicate records as it will help to cut down the number of unmatched transactions received in the GP Links Inbox because of duplicate records.

1. Select the required patient using Patient Find.
2. Access Registration.
3. Make a note of the patient's EMIS number.
4. Click **Edit Patient** or press **E**, point to **Registration Status** and select **Appointment Only**.

The original registration screen for the selected patient is displayed.

5. Delete the CHI number.
6. Click **Edit Patient** or Press **E**, point to **Registration Status** and select **Registration Expired**.

7. Type today's date, and then click **OK**.

### 6.3 Merge duplicate records

**Note:** This is a manual process, and the suggested best practice is to summarise the duplicate patient records.

1. Select the required patient using Patient Find.
2. Access Medical Record: from the EMIS PCS main menu, click **Medical Record** in the Medical Records section, or type **MR**.

**Shortcut:** Press **F11**.

3. Click **Print/Export** or press **N**.
4. Print the medical record for summarising and add this data to the correct (live) patient record. Deduct and remove the CHI number from the duplicate record. You can then archive the duplicate record.

### 6.4 Deduct a duplicate record

1. Make sure that all the data from the duplicate patient record (the record you no longer want to keep on the system) has been added to the live patient record.
2. Make a note of the patient number of the patient you want to deduct.
3. Remove the duplicate record.
4. Access GP Links.
5. In the Outbox section, click **Options**, point to **Security Changes**, and then click **Deduct Patient**. A warning message is displayed.
6. Click **OK**.
7. Select the patient whose record you want to deduct, using Patient Find and the patient number that you noted previously.

A confirmation message is displayed.

8. Click **Yes**.
9. Click  beside **Reason** and select **Other**.
10. Type the date of deduction.
11. In the Notes box, type **Duplicate Patient Record**.
12. Click **OK**.

A confirmation message is displayed.

13. Click **No**.

**Note:** When you access Patient Find again, the patient's details are displayed in blue text.

## 6.5 Archive a duplicate record

**Note:** Making a note of the patient number is a useful way of making sure that you are archiving the correct patient record. Also remove the CHI number from the duplicate record before archiving. For more information, see section 6.2 *Remove the CHI number from a duplicate record* on page 28.

1. From the main menu, click **Patient Archive** in the Configuration section, or type **PA**.
2. Select the required patient.
3. Click the record and select **Archive** or press **A**.

A confirmation message is displayed.

4. Click **OK**.

The record is archived and is no longer displayed in Patient Find.

**Note:** To view archived patients, click **Display** or press **D** and select **Archived Patients**. If required, you can also reactivate archived patients.

## 7 Medical Records Box

In this section, you will learn about the GP Links Medical Records Box.

Use the Medical Records Box to help you deal with medical records for newly registered patients and those who are leaving the practice.

The Medical Records Box contains the following sections:

Section	Purpose	Action required and result
FP22 Reminders	Patients who have been deducted from your practice list are displayed in this section. EMIS PCS adds a patient's name to this section when you accept a deduction in the Inbox from PSD.	When you have sent the patient's paper and/or electronic records back to PSD, right-click the patient's details and select <b>Send Medical Records</b> . This removes the patient from the FP22 file and updates their registration status to Medical Records Sent Back to FHSA. The patient is displayed in the Records Returned, No Receipt section until PSD acknowledges receipt of the records.
Awaiting Records	Newly registered patients with a status of Records Sent by FHSA are displayed in this section if the practice has not yet received the paper and/or electronic records.	When you receive the paper and/or electronic records, access the Awaiting Records section, right-click the patient's details and select <b>Records Received from TP</b> . This updates the patient's registration status to Medical Records Received. <b>Note:</b> If you are expecting both paper and electronic records for a patient, wait until you receive both before taking this action. Always acknowledge records in this section, not through the patient's record.
Records Returned, No Receipt	Patients whose records you return to PSD are displayed in this section until PSD confirms that they have received the records.	If a record is in this section up to 14 days after sending, check with PSD that they have received it. If PSD has acknowledged receipt of the returned records but the Records Returned, No Receipt flag is still displayed in GP Links, click <b>Options</b> or press <b>P</b> , select <b>Security Changes</b> , and then click <b>Remove Medical Records Flag</b> to remove the flag. <b>Note:</b> If you are a cross-border practice, you need to remove records from this section manually if patients have transferred to an English practice. Patients transferring to Scottish practices are automatically removed from this section when PSD acknowledges receipt of the returned record.

**Note:** If a message is displayed when you access GP Links about one of the following topics, it relates to the Medical Records Box section of GP Links:

- Records not returned within 14 days: to action this message, refer to the guidance in the table above for the FP22 Reminders section.
- Records have not been received within 14 days: to action this message, refer to the guidance in the table above for the Awaiting Records section.
- Medical record flags set over 14 days: to action this message, refer to the guidance in the table above for the Records Returned No Receipt section.

## 8 Closing quarters

Use this section to help you close the quarter and produce the necessary certificates and reports.

In this section, you will learn:

- About processing quarter end dates; see section 8.1 *Processing the quarter end dates* on page 32.
- How to close quarters manually; see section 8.2 *Close the quarter manually* on page 32.
- About quarterly certificates and capitation reports, and how to print them; see section 8.3 *Quarterly certificates and capitation reports* on page 32.

### 8.1 Processing the quarter end dates

If there are outstanding transactions awaiting acknowledgment or outstanding unmatched transactions on your system, you must contact the TP. The TP will then send the appropriate approvals to your practice, or authorise you to approve the patients using the options in Security Changes.

In the case of unmatched transactions, the TP may require further information to help match the patients. When you have processed all outstanding transactions, or if there are no transactions to process, the following message is displayed every time you access GP Links: 'To process the quarterly dates and archive the data, click Yes'.

If you do not receive an electronic close quarter message from your TP you can still close the quarter manually.

### 8.2 Close the quarter manually

1. Access GP Links.
2. Click **Options** or press **P**, point to **Security Changes**, and then select **Initiate Manual Close Quarter**.

The High Security Quarter End screen is displayed.

3. Click  beside the Select Quarter End box, and then select the appropriate quarter end date.
4. Click  beside the Select Trading Partner box, and then select the appropriate TP.
5. Click **OK**.

A confirmation message is displayed.

6. Click **Yes**.

### 8.3 Quarterly certificates and capitation reports

After archiving the data, you must produce quarterly certificates and capitation reports:

- Quarterly certificates present a summary of the GP Links transactions on the system for each GP.
- Capitation reports present a patient capitation breakdown for each GP. They do *not* include patients registered after the second day of the new quarter, or those deducted after the last day of the old quarter.

#### 8.3.1 Print the quarterly certificates

1. Access GP Links.
2. Click **Options** or press **P** and select **Quarterly Certificates**.

The Quarterly Certificates screen is displayed.

3. Click  beside the Select Trading Partner box and select the required TP.

4. Click  beside the Quarter End box and select the required date.
5. Click **OK**.

**Note:** To save the quarterly certificates, click **Save to File** and select the folder to save the file to. The quarterly certificates are displayed on the print preview screen.

6. On the print preview screen, click , select the required printer, and then click **OK**.

### 8.3.2 Print the capitation reports

1. Access GP Links.
2. Click **Options** or press **P** and select **Capitation Reports**.

The Capitation Report screen is displayed.

3. Click  beside the Select Trading Partner box and select the appropriate TP.
4. Click  beside the Start Date box and select the appropriate date.
5. Click **OK**.

The capitation reports are displayed on the print preview screen.

6. On the print preview screen, click , select the required printer, and then click **OK**.

A system generated certificate is produced, which you should either e-mail to PSD or print and place in your Envopak bag for the attention of the appropriate PSD staff.

## 9 Bulk transfers

In this section, you will learn about the process used to bulk transfer patients from one doctor to another, for example, when a doctor leaves the practice.

**Important:** Before you start this process, PSD *must* give authorisation. When you have set the leaving doctor's contract end date (item 2 in the list in *The bulk transfer process: overview* below), you must wait 48 hours before you can carry out the rest of the bulk transfer process.

### 9.1 The bulk transfer process: overview

The stages in the bulk transfer process, *in order*, are:

1. Set the local GP code of the doctor the patients are being transferred to and the doctor the patients are being transferred from. Each HB that the doctor has patients registered with provides its own unique code for each doctor.
2. Set the leaving doctor's contract end date in User Manager.

**Important:** This *must* be the following day's date, regardless of when the doctor actually left. Do *not* change the default contract end date.

**Note:** When you have set the leaving doctor's contract end date, you *must* wait 48 hours before you can carry out the rest of the bulk transfer process.

3. Create a new identifying code to add to the records of all the patients to be transferred. EMIS PCS does *not* mark patients' records when patients are transferred from one doctor to another, so if you need to identify transferred patients at a later date, you *must* add an identifying code to their records before you perform the bulk transfer.
4. Create and run a search to find the patients to be transferred.
5. Add the identifying code to the records of all the patients to be transferred.
6. Transfer all patients who had the leaving doctor as their registered doctor to a new doctor (bulk transfer).
7. Transfer all patients who had the leaving doctor as their usual doctor to a new doctor (usual GP reallocation).
8. Mark the leaving doctor as inactive.

### 9.2 Set the local GP code

1. From the main menu, click **User Manager** in the Configuration section, or type **UM**.

The User Manager – User Details screen is displayed.

2. Select the leaving doctor's name, and then click **Edit** or press **E**.

The User Record screen for the selected doctor is displayed.

3. In the Associated User Role section at the bottom of the screen, click the role name, and then click **Edit Association** or press **E**.

The User Roles screen for the selected doctor is displayed.

4. In the Principal Options section, click **Local GP Codes**.

The Local GP Codes screen is displayed, showing the local GP code(s) for the selected doctor.

**Note:** The code AAAA is a default code; if this code is displayed, you must change it to the code provided by the corresponding HB.

5. If you need to edit the local GP code:

- a. Select the appropriate code, and then click **Edit Code**.
- b. Type the new code, and then click **Save**.
- c. Click **OK**.
6. On the User Roles screen, click **OK**.
7. On the User Record screen, click **OK**.

### 9.3 Set the contract end date

1. From the main menu, click **User Manager** in the Configuration section, or type **UM**.  
The User Manager – User Details screen is displayed.
2. Select the leaving doctor's name, and then click **Edit** or press **E**.  
The User Record screen for the selected doctor is displayed.
3. In the Associated User Role section at the bottom of the screen, click the role name, and then click **Edit Association** or press **E**.  
The User Roles screen for the selected doctor is displayed.
4. In the Contract Information section, select **Contract End**.  
The Contract End date box is enabled, with the following day's date displayed as the default.  
**Note:** Do *not* change this date, regardless of when the doctor actually left.
5. Click **OK**.
6. On the User Record screen, click **OK**.

### 9.4 Create an identifying clinical term

1. From the main menu, click **Medical Record** in the Medical Records section, or type **MR**.  
If you do not have a current patient selected, you are prompted to choose one using Patient Find.  
The Medical Record – Summary screen is displayed.
2. Click **Add** or press **A** and select **Any Clinical Term (Read Code)**.  
The Add Clinical Term (Read Code) screen is displayed.
3. Click  beside the Clinical Term box, or press **ENTER**.  
The Clinical Term (Read Code) Browser is displayed.
4. Click the **Hierarchy** tab.
5. In the Find section, type the number of the heading the new code is to be filed under, and then press **ENTER**.
6. Right-click the appropriate heading and select **Clinical Term (Read Code) Properties**.  
The Clinical Term (Read Code) Properties screen is displayed.
7. Click **New Code**.  
A warning message is displayed.
8. Click **OK**.  
The Clinical Term (Read Code) Properties (New Code) screen is displayed.
9. In the Term box, type a name for the code, e.g. **Ex Patients of Dr Watson**.
10. Click **OK**.

11. Close the Clinical Term (Read Code) Browser and the Add Clinical Term (Read Code) screen.

### 9.5 Create and run a search to find the patients to be transferred

1. From the main menu, click **Searches and Reports** in the Searches and Reports section, or type **ST**.

2. Click **Search Population Manager**, or type **SM**.

The Search Population Manager screen is displayed.

3. Right-click the folder where you want to store the new population and select **New Population**.

4. Select **All Patients (Including Those Left or Died)**.

5. Select **Registration**.

6. Select **Registering Doctor**.

The Select Items to be Included in the Search screen is displayed.

7. In the Available column, double-click the appropriate doctor, and then click **OK**.

8. Select **Usual Doctor**.

The Select Items to be Included in the Search screen is displayed.

9. In the Available column, double-click the appropriate doctor, and then click **OK**.

The selected features are displayed in the right-hand pane of the Search Population Manager screen.

10. In the right-hand pane, click the Usual Doctor **Shared** operator, and then in the left-hand pane double-click **Included**.

11. At the bottom of the screen, click **OK**.

The Population screen is displayed.

12. Type a name for the population, and then click **OK**.

A confirmation message is displayed, asking if you want to run the search now.

13. Click **Yes**.

The search runs and the results are displayed.

### 9.6 Add the identifying code to the patient records

1. From the main menu, click **Searches and Reports** in the Searches and Reports section, or type **ST**.

2. Click **Batch Processing**, or type **BP**.

The Batch Processing screen is displayed.

3. Click **Batch Add Clinical Code**, and then click **OK**.

The Read Browser screen is displayed.

4. Select the code you created, using your preferred search method, and then click **OK**.

The Search Populations screen is displayed.

5. Navigate to the appropriate folder, select the population, and then click **OK**.

The Batch Processing screen is displayed.

6. If necessary, amend the date of entry and/or the authorising user.

7. If required, type any additional information in the Descriptive Text box.

8. In the Problem box, select **No**, and then click **OK**.

An information message is displayed.

9. Click **OK**.

The code is added to the records of all patients in the population.

## 9.7 Bulk transfer patients

**Note:** Use this procedure to reallocate the *registered* doctor.

1. Access Registration.

2. Click **Options** or press **O** and select **Bulk Transfer**.

The Bulk Transfer wizard is displayed.

3. Select the appropriate type of GP:

- If the transfer is from a doctor within your practice, select **Local GP**.
- If the transfer is from a doctor outside your practice, select **GP Outside Practice**, navigate to the transfer file, and then click **Open**.

4. Click  and select the transferring doctor's HB, and then click **Next**.

5. Click  and select the transferring doctor's local GP code, and then click **Next**.

The New GP Details screen is displayed.

6. Click **Add**, and then select the patient range, based alphabetically on surname, as required.

**Note:** The Surname Start Pattern field for the first line defaults to AAAAAAA. You can type up to 7 characters to determine a surname range. If you type fewer than 7 characters, the remaining characters are automatically populated.

Example surname splits:

- To move all patients to one doctor, type **AAAAAAA** (or **A**) in the Surname Start Pattern field and **ZZZZZZZ** (or **Z**) in the Surname End Pattern field. This will move all patients with surnames starting with A up to, and including, those with surnames starting with Z.
- To move patients to more than one doctor:
  - a. Type **AAAAAAA** (or **A**) in the Surname Start Pattern field and **MZZZZZZ** (or **MZ**) in the Surname End Pattern field.
  - b. Click **Add** to select a second recipient, and then type **NAAAAAA** (or **NA**) in the Surname Start Pattern field and **ZZZZZZZ** (or **Z**) in the Surname End Pattern field.

Patients with surnames starting with A up to, and including, those with surnames starting with M are moved to the first recipient. Patients with surnames starting with N up to, and including, those with surnames starting with Z are moved to the second recipient.

7. Select a doctor to transfer the patients to, and then click **OK**.
8. Repeat steps 5 to 6 as necessary, and then click **Next**.

A list of patients affected by the bulk transfer is displayed.
9. Click **Next**.

A warning message about the bulk transfer is displayed.
10. Read the message carefully before proceeding.
11. Select the box to acknowledge that you have read and understood the warning, and then click **Finish**.

The patients are transferred.

### 9.8 Reallocate patients

**Note:** Use this procedure to reallocate the *usual* doctor.

1. Access Registration.
2. Click **Options** or press **O** and select **Usual GP Reallocation**.

The Usual GP Reallocation wizard is displayed.
3. Click  and select the transferring doctor's HB, and then click **Next**.
4. Click  and select the transferring doctor's local GP code, and then click **Next**.

The New GP Details screen is displayed.
5. Click **Add**, and then select the patient range, based alphabetically on surname, as required.
6. Click  and select a doctor to transfer the patients to, and then click **OK**.
7. Repeat steps 5 to 6 as necessary, and then click **Next**.

A list of patients affected by the reallocation is displayed.
8. Click **Next**.

A warning message about the reallocation is displayed
9. Read the message carefully before proceeding.
10. Select the box to acknowledge that you have read and understood the warning, and then click **Finish**.

The patients are reallocated.

### 9.9 Mark the leaving doctor as inactive

1. From the main menu, click **User Manager** in the Administration and Documents section, or type **UM**.
2. Select the required doctor, and then click **Set Active Status** or press **U**.

A confirmation message is displayed.

3. Click **OK**.

The doctor is made inactive.

**Note:** If a message is displayed when you mark the leaving doctor as inactive, stating that there are still patients registered to the leaving doctor:

- a. Contact EMIS Support and ask them to reallocate all remaining patients allocated to the leaving doctor to another doctor (provide user names). EMIS Support will give you an EMIS customer reference (ECR) number.
- b. Send a fax to EMIS, signed by the lead partner, containing the ECR number and the practice customer database (CDB) number.
- c. When EMIS Support has completed the transfer, make the leaving doctor inactive.

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