

The Newcastle upon Tyne Hospitals

Adding a new patient record in e-Record

DLV-GEN-WI-006

Adding a new patient in e-Record v1

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Relates to SOP: <u>Paperlite: Recording and Auditing Research Activity in eRecord</u>

Procedure/Method

This procedure should be followed if you need to add a Research Participant on to eRecord, after checking you are certain they are not already registered on the system.

- 1) Launch e-Record and open the **PMOffice** application.
- 2) Once PMOffice has opened, go to the **Conversation** tab then double click **Add Person.**



3) Here, you will be given the option to search for the person to confirm they are not registered. Having done that you can chose, **Add Patient** (D on image below).

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| Patient Search MRN: | Deceased | NHS Number | MON | Nome | Age | Gender | Date of Birth | Registered GF |
|--|--|---|--|------|--------------|----------------------|---|---------------|
| Surname: Z Forename: E NHS Number: Date of Birth: 15/07/1970 Gender: Postcode: Cander: B | Enter EITHE OR pati Click Searc When you a registering a | R NHS Numi ent initials ar h to look for re satisfied t new patient, Patient | ber if known nd DOB your patien hat you are select Add | | AINE 47 Year | C C C C C T I A I be | heck that ret sults are NO HE PATIENT RE REGISTE fore you reg new patier | Add Patient |

4) In the **Organisation** window, search for the hospital where you are based in the **Facility Name** search box. This example shows RVI - type the letter R, click the Ellipsis (...) and select Royal Victoria Infirmary.



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- 5) A warning will appear about registering a new patient. If you are certain this is a new patient who hasn't previously been seen at this Trust in the past, select **No**.
- 6) In the Add Person window, complete the following fields NHS Number, Surname, First Name, DOB (date of birth) and Gender. For Birth Date Entry, select Confirmed.

| 🛉 Add Person | | | | |
|-----------------------|--------------------------|---|-----------------|-------|
| \$ | | | | |
| MBN: | NHS Number: | NHS No Status: | r. | |
| Title: | Sumame: z | First Name: e | Middle Name: | M |
| Birth Date Entry: | DOB: 15/07/1970 | Add NHS Number if applicable to this | Gender: | Marit |
| Country of Residence: | Ethnic Category: | Complete patient Surname and First Name if applicable | First Language: | |
| GP Details: | GP Practice: | Add the patient Gender Complete the Birth | | _/ |
| Address | e Numbers Must be Numeri | c Only E.o | | |

7) In the **GP Details** field, type the name of the GP you wish to find and click the magnifying glass to search.



8) In the top part of the screen, select the correct **GP**. Then at the bottom of the screen select the correct **GP Practice**, then click **OK**.

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| Clinical Staff Selection | | | | |
|-----------------------------------|---|---|-------------|----------------|
| Surname: | | Forename: | Suffic | Search |
| crackett | | | | • |
| Title: | | Alias: | Alias type: | New Clin Staff |
| | • | • | | Preview |
| User Name: | | 7 | | Clear |
| Limit by group | No data filtering | | | |
| Limit by organization | No data filtering | | | |
| Limit by position | No data Bloving | | | |
| Limit by relationship | Select the correct | patient GP | | |
| View Clinicians Only | | | | |
| Name Organ | nisations S Aliases | Positions User name | | |
| CHACKETT, G Crackett, Geoffrey | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | select the Practice - not selecting the Practice will result | | |
| Dispanisation Address | Phone Aliae | in the GP being added, but not | - | |
| Torganisation (Modess | | be saved if you do not associate | | |
| 1 MIDDLE CHARE MIDDLE | CHARE | the practice | | |
| COUNTY | R-LE-ST 0191 5947654 B G9609226 E (DURH | xter | | |
| England | Business | | | |
| | | | | |
| | | | | |
| | | | | |

 Check both the GP details and the GP Practice are populated correctly in the patient record.

| GP Details: Drackett, Geoffrey | GP Practice: MIDDLE CHARE MEDICAL |
|-----------------------------------|--------------------------------------|
| | |

10) Although it is not marked as mandatory, you must now **add a telephone number**.

| Phone Numbers Must be Numer | ic Only E.g. 2330000 or 019123300 | 00 | | |
|-----------------------------|-----------------------------------|------------|----------------------|-------------------------|
| Home Phone Number: | Work Phone Number: | Extension: | Mobile Phone Number: | Alternate Phone Number: |

If the patient phone number is not known, or they do not have a telephone, you must enter "NK" into the home phone field. If the patient has a mobile number but not a home number, you should add "NK" into the home number field and the mobile number into the Mobile Phone field as this assists with the Trust's DNA (Did Not Attend) Reminder Service – please do not enter a mobile number into the home number field.

11) Although this is not marked as a mandatory field, a Patient Address should be added. To add the patient's Home Address, you must first select the "+" icon in the Address organiser field. When the Address Viewer Form opens, select Address Search.

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| Address Referral Details Guardian/Parental Responsibility Waiting Time | s and Status |
|--|---|
| Phone Numbers Must be Numeric Only E.g. 2330000 or 0191233000 Home Phone Number: Work Disus Number: 01911234567 Add an Address Image: Street Address Street Address 2 City State (C) | sion: Address Viewer Form v2 (New Add |
| | Residence: UK Residence Kaddress Search Building Number/Street Number: Locality/Village: OK Cancel |

- 12) When the **QAS Address Search** opens, enter the patient's **postcode** and click **Select**.
- 13) Select the correct address and once the QAS Search window is populated with the patient's address, click **Accept**, then click **OK** to close the search screen and save the patient record.

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|---------------|---|---|
| Enter buildir | ng number | Accept |
| 1888 | (C Matta mata | |
| | | * Address Type: Home * Residence: UK Residence |
| | 1011100 | Address Search Building Name/Flat Number: |
| | | Building Number/Street Name: |

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14) Finally, check all information has been added then click OK.

| | Terro Hearbor. | 1110 110 510/08 | | | |
|--|---|--|---|---|--|
| | | | | | |
| | Surname: | First Name: | Middle Name: | Maiden Surname: | |
| | ZZZHOLD | EILEEN | | | |
| ite Entry: | DOB: | Age | Gender: | Manital Status: Learning disability: Military Veteran: | |
| ed . | • 15/07/1970 🗧 • | 47Y | Female | | |
| of Residence: | Ethnic Category: | Religion: | First Language: | Intrepreter Required?: EHIC Number: | |
| | • • | - | • | • | |
| | CD Develop | CDD Databa | | | |
| t, Geoffrey | GROUP PRACTICE SURGI | due detais. | 1 | | |
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| 15 | | | | | |
| 15 | | | | | |
| s Int Contact Details- Ph | hone Numbers Must be Numeric Only E | .g. 2330000 or 01912330000 | Maile Charachina | | |
| s Int Contact Details- Ph Phone Number: 12345678 | hone Numbers Must be Numeric Only E Work Phone Number: | .g. 2330000 or 01912330000 | Mobile Phone Number: | Alternate Phone Number | |
| s nt Contact Detaile- Ph Phone Number: 12345678 | hone Numbers Must be Numeric Only E Work Phone Number: | .g. 2330000 or 01912330000 | Mobile Phone Number: | Alternate Phone Number | |
| s Int Contact Details- Ph Phone Number. 12345678 ss Organizer. | hone Numbers Must be Numeic Only E Work Phone Number | .g. 2330000 or 01912330000 Extension: | Mobile Phone Number | Alternate Phone Number | |
| | hone Numbers Must be Numeic Only E Work Phone Number | .g. 2330000 or 01912330000 Extension: | Mobile Phone Number | Alternate Phone Number | |
| a Int Contact Details-Ph Phone Number: 12345676 ss Organizer: EE J EE C Address Type Build Home | none Numbers Must be Numeric Only E Work Phone Number | g 2330000 or 01912330000 | Mobile Phone Number: | Alterate Phone Number | |
| nt Contact Details-PH Phone Number: 12345678 ss Organize: EE Ball Address Type Ball Home | none Numbers Must be Numeric Only E Work Phone Number Mone Number drg Nanev/Flat Number Building Nu | g, 2330000 or 01912330000 | Mobile Phone Number: ge Toner/City County WASHINGTON Tyre and W | Altenate Phone Number | |
| ant Contact Details-Ph Phone Number 12345678 ss Organizer: Address Type Build Home | Inone Numbers Mutt be Numeric Only E Work Phone Number drig Name/Flat Number Building Nu | g 2330000 or 01912330000 | Noble Phone Number: ge Toren/City County WASHINGTON Type and W | Alternate Phone Number Country (C) Postcode Begin effective date at 03/0cs/2017 When all information has been added click OK | |
| a | work Phone Number: Work Phone Number: Manuel Phone Number: Manuel Phane Number Building Num | Lg. 2330000 or 01912330000 | Moble Phone Number ge Town/Dity County WASHINGTON Tyne and W | Alternate Phone Number Country (C) Postcode Bagin effective date 03/0cr/2017 When all information has been added click OK | |
| en Contact Datais-Ph Phone Number 12345678 es: Organise: ES: Organise: Modes: Type Build Home | work Numbers Must be Numeric Only E Wolk Phone Number: | eg. 2330000 or 01912330000 | Moble Phone Number 9e Town/City County WASHINGTON Tyre and W | Alterate Phone Number Country (C) Postcode Begin effective date ar Output: Country (C) Postcode 00/06/2017 When all information has been added click OK | |
| ees e Prone Number 112345670 112345670 E Stopanier E E E La Constance Address Type Build Home | none Numbers Must be Numeric Only E Work Phone Number: Mane Phone Number drg Name (Flat Number Building Num | eg. 2330000 or 01912330000 | Noble Phone Number 9 Town/City County WASHINGTON Type and W | Attenute Phone Number | |

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