

# Adding a new patient record in e-Record

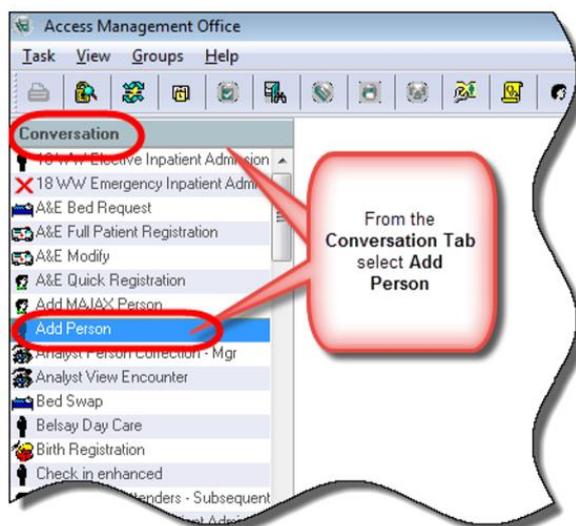
DLV-GEN-WI-006

**Relates to SOP:** [Paperlite: Recording and Auditing Research Activity in eRecord](#)

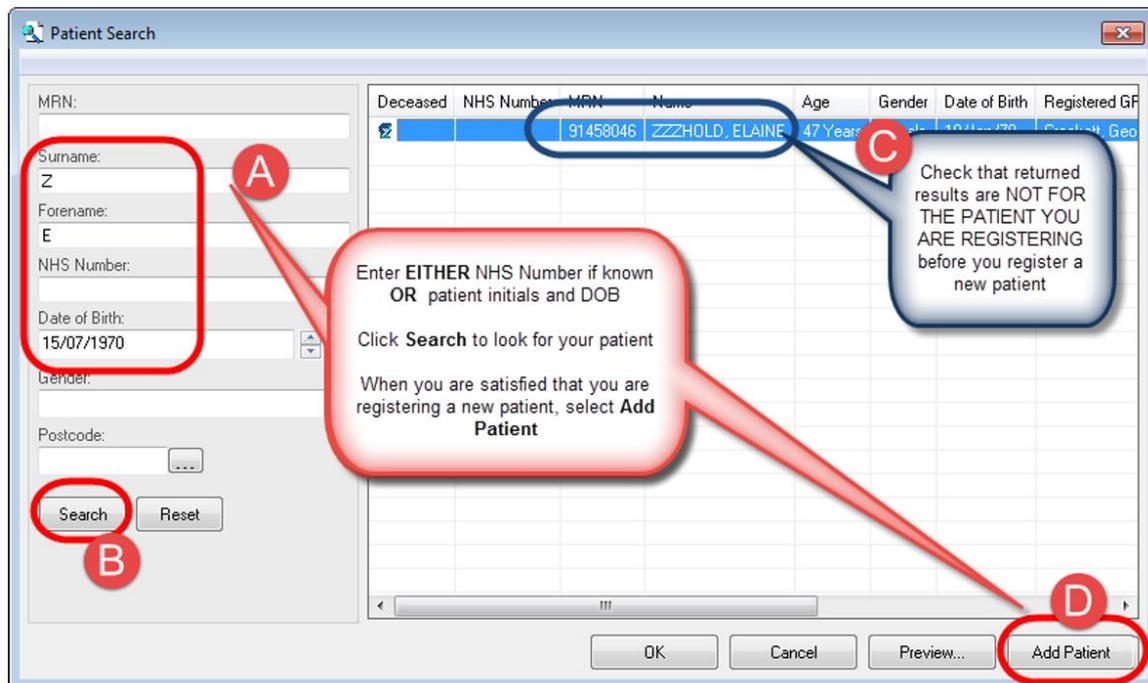
## Procedure/Method

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.

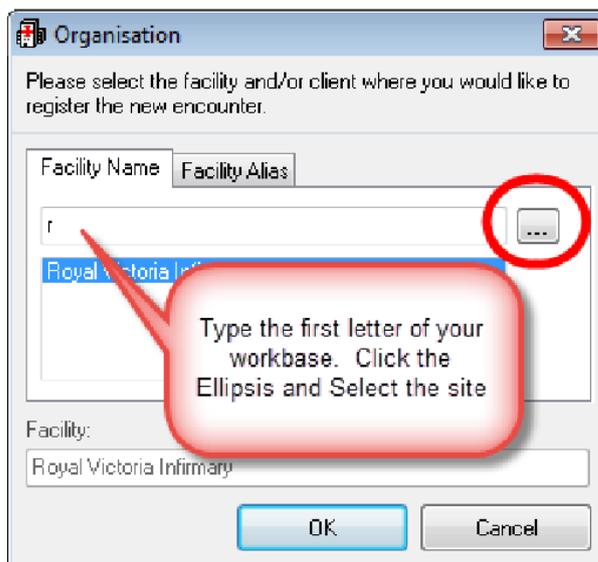
- 1) Launch e-Record and open the **PMOffice** application.
- 2) Once PMOffice has opened, go to the **Conversation** tab then double click **Add Person**.



- 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).



- 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.



- 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.

The screenshot shows the 'Add Person' form with the following fields highlighted by red circles: NHS Number, Surname (containing 'z'), First Name (containing 'e'), Birth Date Entry (set to 'Confirmed'), and Gender. A blue callout box with white text provides instructions: 'Add NHS Number if applicable to this patient', 'Complete patient Surname and First Name if applicable', 'Add the patient Gender', and 'Complete the Birth Date Entry'.

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

The screenshot shows the 'GP Details' field with the text 'crackett' and a magnifying glass icon circled in red.

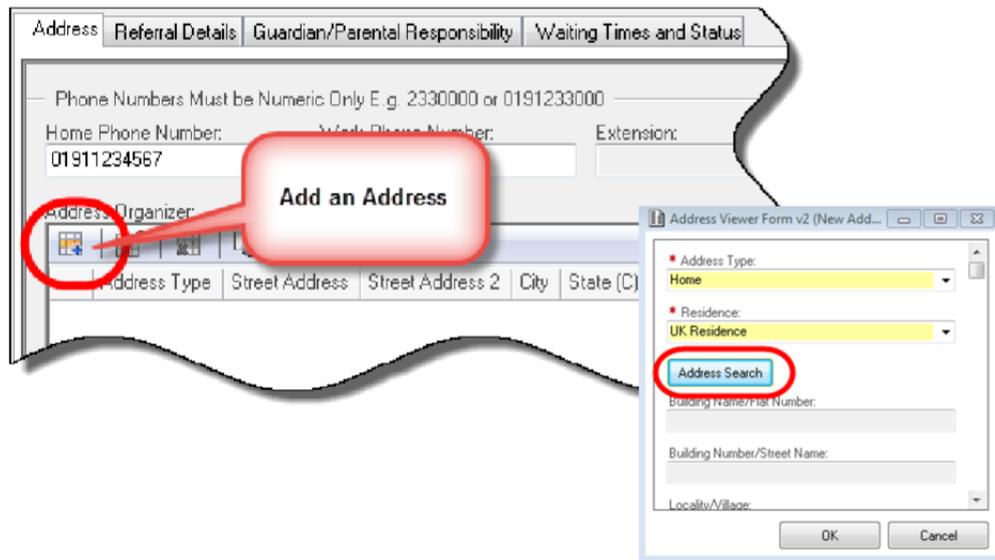
- 8) In the top part of the screen, select the correct **GP**. Then at the bottom of the screen select the correct **GP Practice**, then click **OK**.

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

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

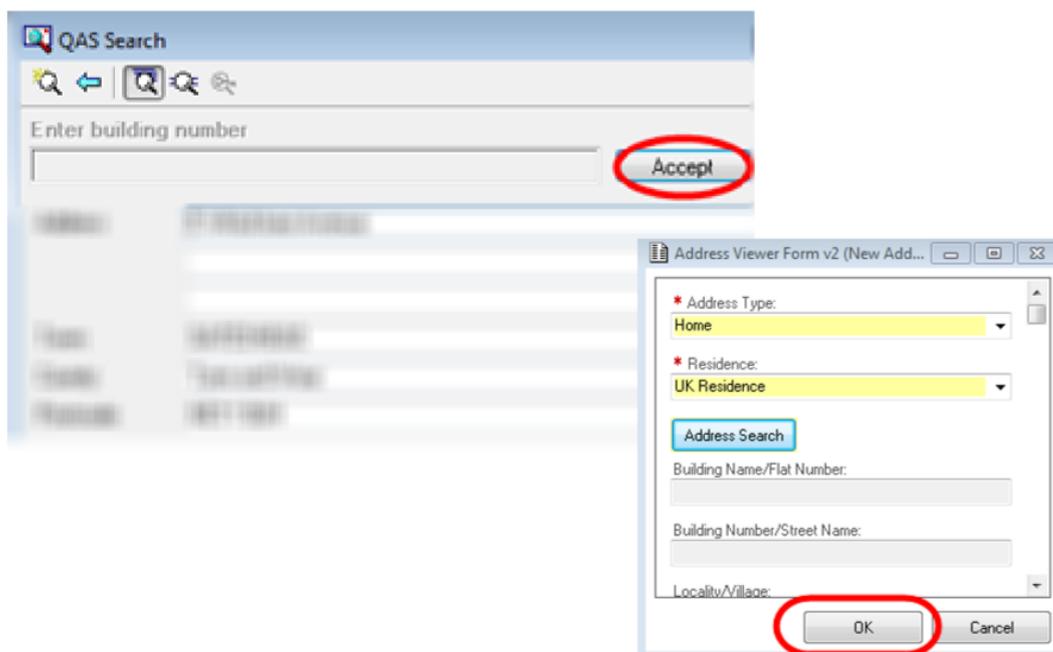
**If the patient phone number is not known**, or they do not have a telephone, you must enter “NK” into the home phone field. If the patient has a mobile number but not a home number, you should add “NK” into the home number field and the mobile number into the Mobile Phone field as this assists with 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**.



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.



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

The screenshot shows a software window titled "Add Person". The form is divided into several sections:

- Personal Details:** Title, Surname (ZZZHOLD), First Name (EILEEN), Middle Name, Maiden Surname.
- Demographics:** Birth Date Entry (Confirmed), DOB (15/07/1970), Age (47Y), Gender (Female), Marital Status, Learning disability, Military Veteran.
- Residence:** Country of Residence, Ethnic Category, Religion, First Language, Interpreter Required?, EHIC Number.
- GP Details:** GP Details (Crackett, Geoffrey), GP Practice (GROUP PRACTICE SURGI), GDP Details.
- Address:** Patient Contact Details (Phone Numbers), Home Phone Number (01911234567), Work Phone Number, Extension, Mobile Phone Number, Alternate Phone Number.
- Address Organizer:** A table with columns: Address Type, Building Name/Flat Number, Building Number/Street Name, Locality/Village, Town/City, County, County (C), Postcode, Begin effective date. The first row shows: Home, [blank], [blank], [blank], WASHINGTON, Tyne and Wear, [blank], 03/Oct/2017.

A red callout box with a white background and a red border points to the "OK" button at the bottom right of the window. The text inside the callout box reads: "When all information has been added click OK".