



Mini Manual

Appointment Centre

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Support available:

Please contact your local Champion User

Service Desk:

Tel: 01225 82 5444

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Bringing it all together

Patient Search

1 Patient Search

1.1 Family/Surname

- Step 1.** Ask for the patients full surname
- Step 2.** Swap the first name and surname around
- Step 3.** If they have a double barrell surname, try both combinations
- Step 4.** Ask how they spell their surname as it may differ to how you expect it to be spelt

1.2 First Name

- Step 1.** Ask for the patients full first name
- Step 2.** Try using the second forename as the first name
- Step 3.** Ask how they spell their first name as it may be different to the conventional spelling
- Step 4.** Check if it is a shortened version of the first name, e.g. Chris instead of Christopher or Christine

1.3 Wildcards

Wildcards can be used within the Advanced and Local searches. You can use wildcards for both first name and Surname.

- Step 1.** Enter at least 2 characters of the surname plus * e.g. Sm*
- Step 2.** Enter at least 2 characters of the first name plus * e.g. Ch*

1.4 Address and Postcode

- Step 1.** Check that the address is the patients permanent address and not that of a temporary residence e.g. holiday home or temporary residence
- Step 2.** Ask if the patient has recently moved house and if so have they informed their registered GP? If not check their previous address/es.
- Step 3.** Check if the property is a house name or number

Patient Search

1.5 Other things to check

- Step 1.** Has the patient received treatment within this Trust before?
- Step 2.** Have they received treatment at any hospital in England before?
- Step 3.** Are they currently registered with a GP?

If the answer to any of these questions is yes, it can be reasonably assumed that the patient is on the PDS....so search again!

1.6 On retrieval of a record from the PDS

- Step 1.** If the patient is present they should be asked for an item of demographic data not used in the trace as confirmation, e.g. 1st line of address or GP, whichever is not used in the trace
- Step 2.** If the patient is not present, unused demographic data accompanying the trace details may be used to confirm the correct record
- Step 3.** If the information does not match, **Search Again, Do not select Add Patient**

1.7 Secrets for Success

- Step 1.** Don't rush the search
- Step 2.** Check details carefully
- Step 3.** Remember that proper tracing will return the correct record



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