



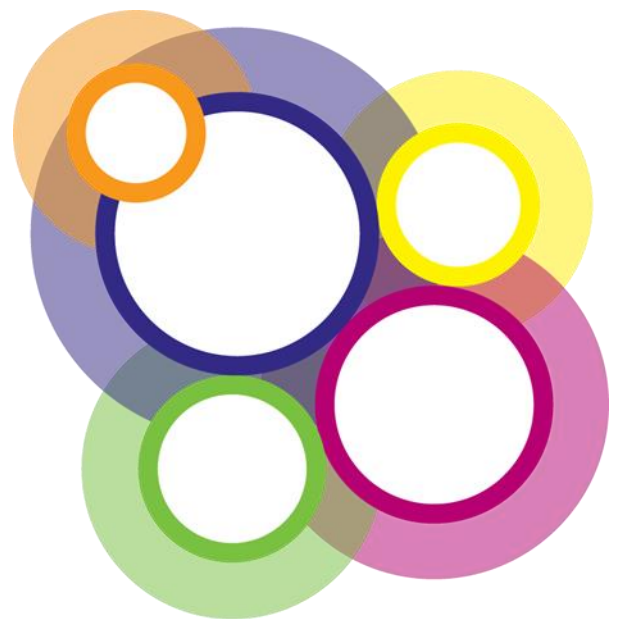
North of England
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NECS Clinical Systems Specialist Team

SystemOne - Internal Transfer Mini Guide

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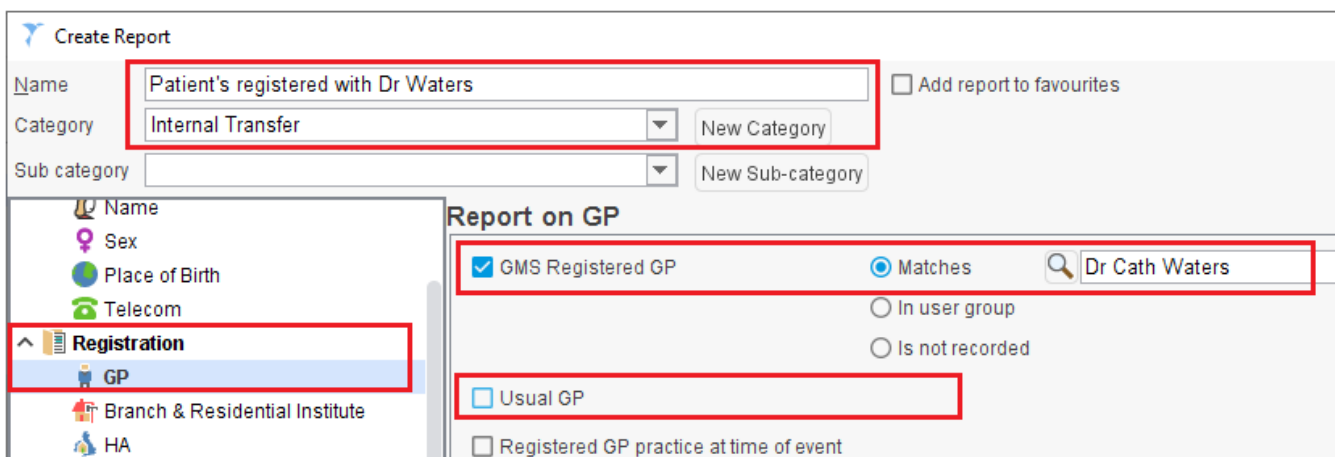
Internal Transfer

It is sometimes necessary to transfer the Registered and/or Usual GP for all patients. An example is when a GP leaves the practice.

This process can be performed either by running a report to identify all patients or manually


GMS Registered GP / Usual GP – Report

1. Click **Reporting - Clinical Reporting** and select **New**
2. **Name** the report and select an appropriate **Category**
3. Click the **Registration** folder
4. Tick to select either **GMS Registered GP** and or **Usual GP** (depending if the practice has a pooled list)



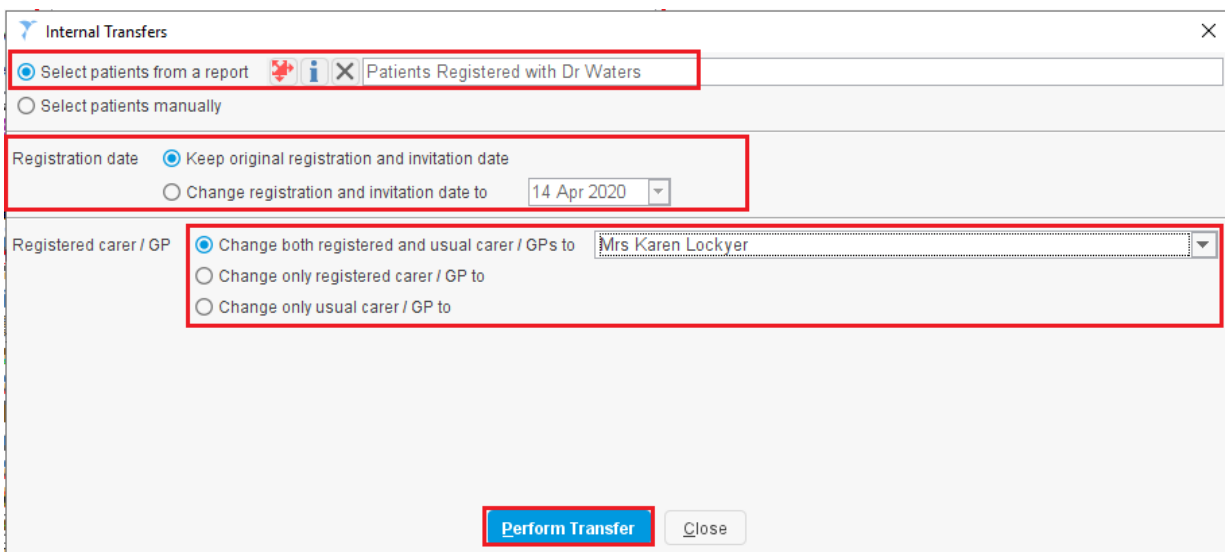
5. Click **Ok** and **Run the report**

Transfer patients from a Registered GP to another - from a Report

1. Click **Setup - Bulk Operations - Internal Transfer**
2. Click **Select patients from a report**, click the report icon  and select the relevant report created
3. **Registration date** can be left unchanged or specify a date

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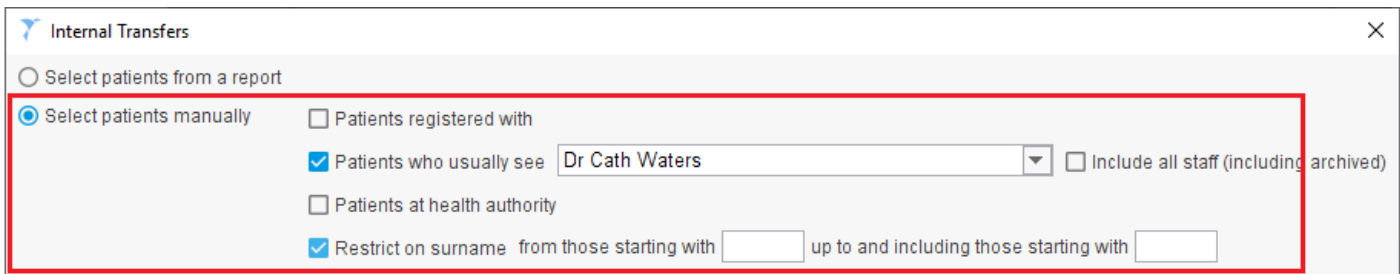
4. Select whether the patients are changing:
 - a. Both registered and usual GP
 - b. Only registered GP
 - c. Only Usual GP
5. Select a GP to transfer patients to
6. When all details are checked, click **Perform Transfer**



7. Click **Yes** and continue until all warning messages have been read
8. A **Pending Bulk Operation task** will be generated confirming the transfer will take and at what time

Transfer patients from a Registered GP to another – manually

1. Click **Setup / Bulk Operations - Internal Transfer**
2. Click **Select patients manually** and select one of the following:
 - a. Patient registered with (if not a pooled list), select the GP
 - b. Patients who usually see, select the GP (can select both registered and usual)
 - c. Restrict on Surname – once the above is selected you can split the patients to transfer to another GP by surname



Internal Transfers

Select patients from a report

Select patients manually

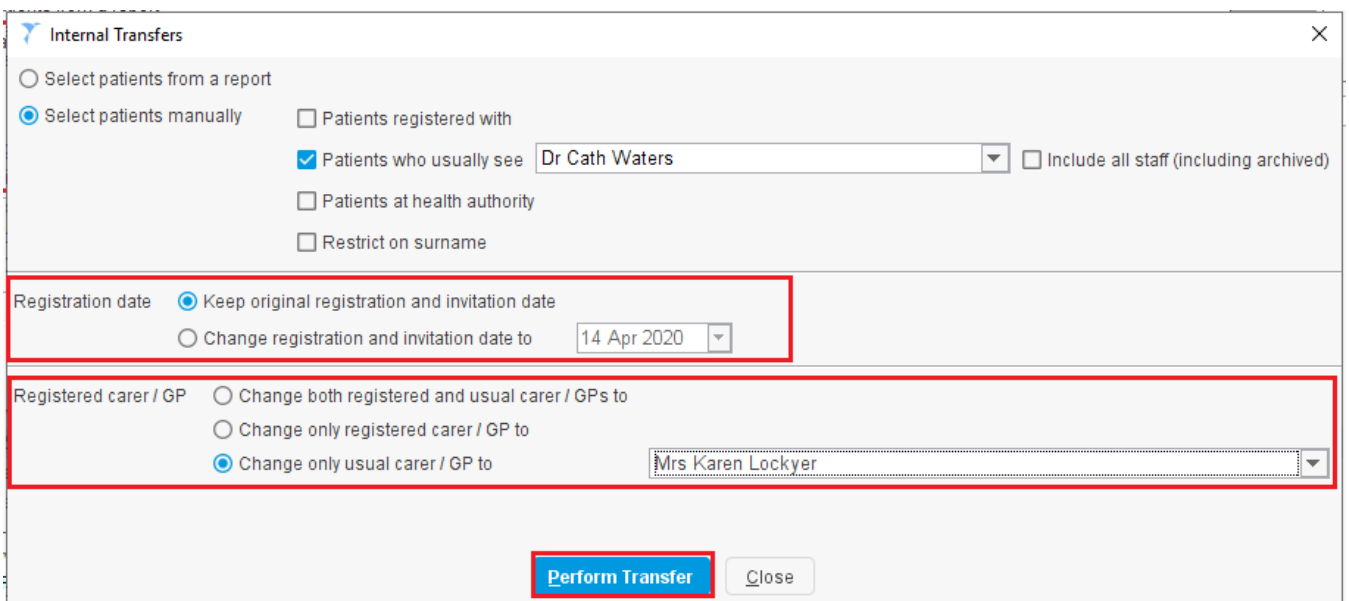
Patients registered with

Patients who usually see Include all staff (including archived)

Patients at health authority

Restrict on surname from those starting with up to and including those starting with

3. **Registration date** can be left unchanged or specify a date
4. Select whether the patients are changing:
 - a. Both registered and usual GP
 - b. Only registered GP
 - c. Only Usual GP
5. Select a GP to transfer patients to
6. When all details are checked, click **Perform Transfer**



Internal Transfers

Select patients from a report

Select patients manually

Patients registered with

Patients who usually see Include all staff (including archived)

Patients at health authority

Restrict on surname

Registration date Keep original registration and invitation date

Change registration and invitation date to

Registered carer / GP Change both registered and usual carer / GPs to

Change only registered carer / GP to

Change only usual carer / GP to

7. Click **Yes** and continue until all warning messages have been read
8. A **Pending Bulk Operation task** will be generated confirming the transfer will take place and at what time

Note: Only System Administrators can cancel a bulk transfer by deleting the bulk operation task.