SystmOne - New Links Guide

Author: NECS Clinical Systems Specialists Team

Revision date: 11/06/2020

Table of Contents

Contents

EDI works from various screens:

Note: This guide does not cover the transfer of patient records in and out via GP2GP. Please see separate guide covering GP2GP.

The main work will be done via **New Links**.

Once some of these are actioned you will then work from **Medical Records In/Out** and **FP69 Administration** (all in the Links main drop down menu).
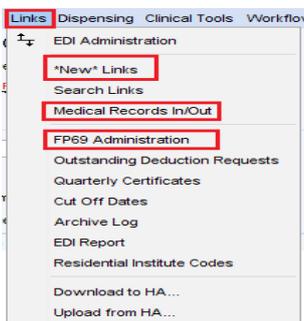
You will also need to track medical record received and records you have sent via the PCSE Portal.

Stage 1 - New Links

Using the Correct Processing Order

1. You must always process EDI messages in the order given here and ensure that you process them regularly (at least once or twice a week).

2. Processing messages promptly and in the right order will keep the messaging functions running smoothly and ultimately save you time.

3. If you process the messages out of sequence, or irregularly, some messages may turn red (indicating an error or problem) which means that you will then have to identify and fix the problem before you can action the messages. Some messages may also display in red if they are not directly matched to a patient, further investigations will need to be done in this situation.

4. After investigations have taken place, Security Controlled Procedures may need to be carried out manually in order to resolve errors/problems and this will update the medical record. However, this information will not transfer down the links back to PCSE, for example to deduct a patient or approve a patient for GMS (see Security Controlled Procedures below for further details).

5. Auto Action All can be used, this will process any information displayed in green text as Recep Ok/Approved which does not require user intervention, leaving the remaining work to be investigated.

The colour coding used in the New Links screen are:

Green text	Good – Approved
Bold Green Text	Messages left for more than three days
Black text	Sent but PCSE (Health Authority in SystmOne) not acknowledged
Red text - Rejections	Will need to be resolved – contact PCSE if no information is given
Red text – Sent	The status is still sent and is over 3 days – contact PCSE
Red text – Recep_OK	Contact PCSE
Bold Red Text	Unmatched Transaction – see if NHS Number is given to identify patient, if not contact PCSE and process the message manually via security controlled procedure
Brown/orange text	Pending ready to be sent

The correct order for processing messages is:

Amendments Out

This tab contains the messages that are sent from your Practice to PCSE (Health Authority in SystmOne). These messages usually inform the PCSE of a change of patient details, e.g. change of name or address. The messages are automatically generated by the system when you amend the SystmOne patient record.

1. When these messages have been received it will be displayed in green text with RECEP in the status column. These can be actioned to remove them from the screen – right click and select **Action** or use the button at the top of the screen. Alternatively, these messages will be actioned if using **Auto Action All**.

2. To send supporting comments to the PCSE when changing a patient's details do one of the following:

   a. Click **Record EDI Amendment Notes** when recording the change in the patient record via the New Home Address.
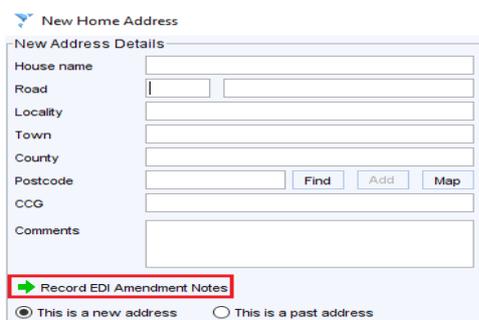
   b. Select **Amendments** from the Administrative tree and click **Record EDI Amendment Notes.**

Note: Comments must be sent at the same time as the amendment, so *must* be recorded with the amendment. If you save the patient record before adding the comment, it will not be sent to the with the amendment.

Registration

1. This tab contains the messages that are sent from your Practice to the PCSE when a new patient is registered. The messages should remain in this screen until they have been approved and in green text with Approved in the status column. These can then be actioned and the patient will be fully registered for GMS. The patient's registration status will be set to GMS. Again **Auto Action All** will process all registrations that have been approved.

   Note: If a message contains invalid characters, SystmOne will warn you by creating an EDI Validation Error task and the message will be stopped. As soon as the invalid data has been corrected in the patient record, the message will automatically be sent to the PCSE.

2. The following list gives examples of the status of messages that will be displayed on this tab:

   a. SENT – a message sent from your organisation to inform the PCSE about the new patient registration.

   b. RECEP_OK – a message sent from the PCSE to acknowledge that your message was successfully received.

   c. APPROVED – a message sent from the to indicate that the patient is now fully registered for GMS (the message is displayed in green text).

   d. RECEP_OK – a message sent from the that has not been successfully received (indicated by the fact that the message is in red text).

   Note: Write down the relevant Inter ID number and/or patient name and date of birth and contact PCSE to ask them to provide information about the patient e.g. NHS Number. Security Controlled Procedures can then be performed to rectify this message.

Amendments In

1. Amendments are sent from the PCSE to the GP practice to notify you of discrepancies between the details they hold for a patient and those you hold, e.g. different post code. Each message needs to be actioned individually and the amendments can either be actioned or refused.

2. If a message does not contain patient details, contact the PCSE to find out which patient the message is for and ask them to resend the message.

3. You can click **Remove Out of Area**, if appropriate, (you will be prompted to supply a reason) to send a Removal out of area message to the PCSE.

4. If you action a message that would create a duplicate NHS number on SystmOne, you are given the opportunity to merge the duplicate records (only System Administrators can do this). Provided the demographic details within the two records match, the two records are merged overnight and the merged record will be available the following day.

5. If you do not want to merge the patient record, the Amendment In message will be processed and the NHS number will remain the same.

6. If the demographic details within the two records do not match, you will need to amend the incorrect details.

Note: Auto Action All will **not** process any Amendments In.

Medical Record Sent

1. These messages are sent from the PCSE to the GP practice when they have sent the patient records to the practice (after registration). These messages can be auto actioned as soon as they arrive as they move to another screen (see Medical Records In/Out below). The patient record status will be updated to Coming from HA (Health Authority in SystmOne).

2. Before auto actioning the messages displayed on this tab, it is good practice to right click on the list and select Table - Open as RTF to print out a copy of the list of patients. You can then make a visual check that you do have the patient records listed and then action each message as appropriate.

Note: Messages will only show in this section if PCSE are sending messages. Practices must use the portal to review what records have been sent.

Medical Records Flag Removal

1. This tab contains messages from the PCSE acknowledging receipt of medical records you have sent to them.

Note: PCSE currently do not send messages to confirm that they have received the record.

Deduction

1. This tab contains messages regarding patients leaving your organisation, e.g. deceased patients, internal transfers, removals to another area. These messages can be auto actioned, as they will move to another screen (see Medical Records In/Out below) where they can be printed and then marked as Medical Records Not Here.

2. When processing, if the patient has any appointments, visits and/or recalls, a dialogue will display to automatically remove these from the system.

Do you want to cancel any pending appointments, visits or active recalls and remove from any waiting lists?			
Select None	Select All	Invert	
Active Recalls (1)			
Date ▽	Type	Severity	Cancel
20 Dec 2022	Cytology Smear	Normal	☑

Note: Always check it is appropriate to remove these from the system before proceeding further.

When a deduction code is received from the PCSE, a flag containing details of the code (e.g. Removal to New HA (Health Authority in SystmOne) or Death is added to the patient record. To view the flag, click the **Administrative** tree and select **Misc. Flags**.

Other options available within the New Links screen:

Deduction Request

The deduction requests can be auto actioned and the PCSE will then send a deduction through. To create a Deduction Request from the menu bar, click **Patient** – **Patient Maintenance** – **Deduction Request**.

FP69 Prior Notification

These messages come from PCSE informing you that patients need to be put on FP69 Status. The comments column will display reasons for the FP69, e.g. dead letter office. Each needs to be actioned:

   a. Change Address – record the patients new address details
   b. Deduct Patient – Confirm you want this patient removed from your practice list
   c. Submit amendment – send the changed details to PCSE
   d. Take no action yet – Further investigation needed
   e. Cancel – Return to the new links screen

If Take no action yet is selected the patient will move to the FP69 Administration screen where they will remain until the address can be confirmed or are deducted from the practice. The patient will be deducted if no action is taken after six months.

FP69 Flag Removal

When a patient is removed from FP69 status e.g. actioned via FP69 Administration screen, a message will display in this section. This will stop the clock for them to be deducted. When a message is actioned the FP69 removal flag is added to the patient's record.

Close of Quarter

The practice will receive a Close of Quarter Notification towards the end of each quarter, if the practice covers more than one PCSE e.g. North-Tyneside and Northumberland, then you will receive two notifications, one for each area. The quarter can only be closed when all sections of the 'new links' are empty i.e. all messages are actioned, including any messages in red.

Stage 2 - Medical Records In/Out

1. This screen has been designed to make it easy to process patient records going to and coming from PCSE
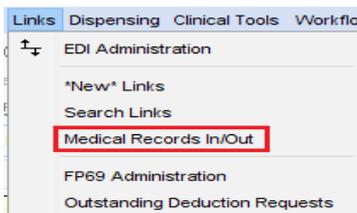
2. When messages are actioned in the Deductions section, the message will then display in Medical Records In/Out, and is ready for the patient's record to be printed if needed and sent to PCSE

3. Review each patient to see if the record needs to be printed, if not click **Mark Selected Records as Not Here**
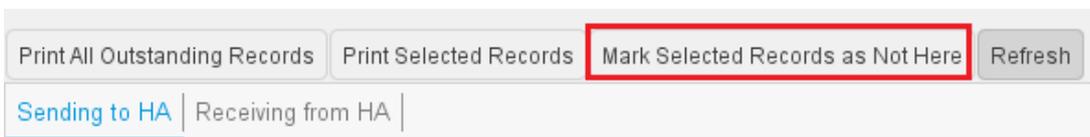
4. If records need to be printed a folder may need to be created on your desktop for any attachment that will need to be saved e.g. some letters, ECG Readings, photos, etc.

5. Click **Print Selected Records**

6. **Save** any attachments to the folder created. MS Word will open with all elements of the record. **Print** as normal. A message will display to update the record stating **No Longer at your Organisation.**

7. Access any attachments via the folder you created and print.

8. Medical Records In/Out (Receiving from HA) displays the messages that are actioned in the Medical Record Sent section of the New Links screen.
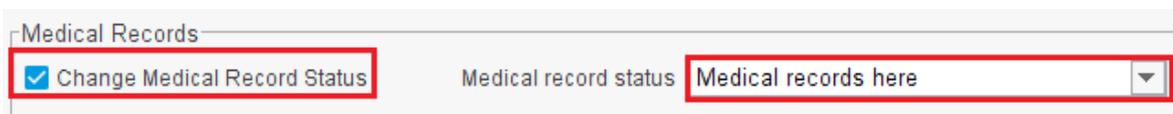

Note: Currently no messages will display in this section.

9. Retrieve the patient record, click patient menu, patient maintenance, select security controlled procedures
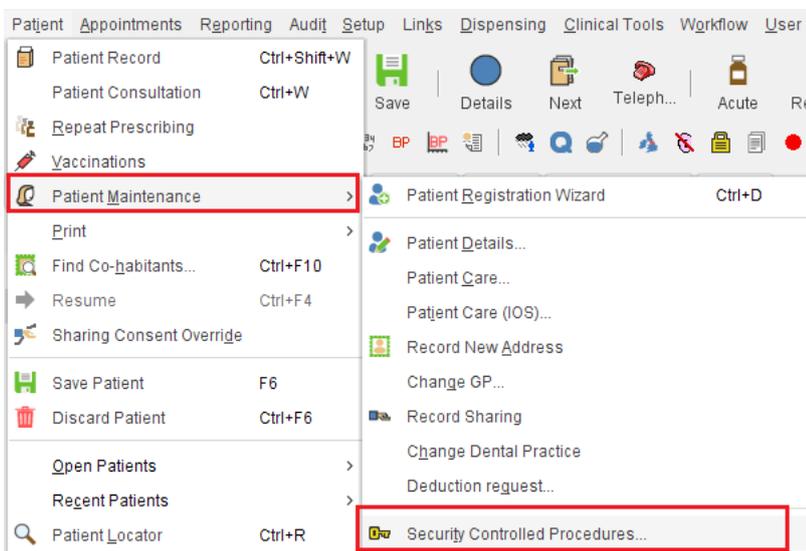
10. Click Medical Records – Change Medical Record Status, select Medical records here, click Ok and save the patient record

Stage 3 - FP69 Administration

1. This screen displays a list of patients with a current FP69 status that has been actioned as Take no action yet. The information displayed:

   a. FP69 expiry date
   b. Reason for the FP69 status
   c. Action taken and the date

   Note: Do not confuse the FP69 Administration screen with the FP69 tab on the New Links screen. The FP69 tab contains unactioned messages received from the PCSE showing patients who have been allocated FP69 status and patients for whom the PCSE is removing the FP69 flag.

2. All messages within this screen were actioned from the New Links screen and are stored in the FP69 Administration screen. The messages can be actioned by highlighting the message and clicking the **Action FP69** button at the top of the screen or you can right click on the message and select Action.

3. The options for FP69 are to deduct the patient and submit confirmation of the amendment once amendments are made e.g. a new address is added. This will remove the patient from FP69 status.

Security Controlled Procedures

1. Security Controlled Procedures can be done to manually resolve links that have not been matched to a patient for example messages in Red and PCSE has been contacted

2. Retrieve the patient record, click **Patient – Patient Maintenance – Security Controlled Procedures**

Change NHS Number	Record an NHS Number for a patient, usually new patients that have not been matched to the spine, Links may show as red in registration. The system may inform you of a duplicate patient and to merge the record. Continue if you are sure this is the same patient.
Change Acceptance Status	Accept for GMS if the registration has been approved but this is still shown as green text (applied).
Change Deduction Status	Deduct a patient and select the reason from the drop down list.
Change Medical Record Status	Change the status as required via the drop down list e.g. medical records here.
Amend Patient's (Health Authority)	Change the, if applicable, and only when authorised.
Remove FP69 Status	Only when authorised to remove the FP69 status.
Merge with Another Patient	Merge this record with another record on your unit, this can only be done if the patient has the same surname, DOB, gender and postcode.

New Links Processing Order Diagram

Stage 1

a. Amendments Out

↓

b. Registration

↓

c. Amendments In

↓

d. Medical Records Sent

↓

e. Medical Records Flag Removal

↓

f. Deductions

↓

Stage 2

g. Medical Records In/Out

Medical Records sending to HA

Medical Records receiving from HA

Stage 3

h. FP69 Administration