

Adults Quick Guide

References

A person's record is likely to contain a number of references, for example NHS number and National Insurance Number.

Viewing References

References can be viewed in the **References numbers** section on the **Person summary** screen.

This section displays the reference type and the reference number/details.

Recording References

To record a reference

- Click **Person details > References** in the extended sidebar menu or click the **Change** button in the **Reference numbers** section.

Note: The 'Change' button will only be visible if at least one reference number has been recorded.

The **References** screen displays.

- Click the **Add** button

The **Add reference** screen displays.

Complete the fields on the screen.

- Click the **Save** button

The **References** screen displays.

- To add multiple references, repeat the process by clicking the **Add** button, or click the **OK** button to return to the **Person summary** screen

Updating References

To update a reference:

- Click **Person details > References** in the extended sidebar menu or click the **Change** button in the **Reference numbers** section.

The **References** screen displays.

- Click **Edit Pencil** icon 

The **Amend reference** screen displays

Edit the fields on the screen as necessary.

A 'Reference' should only be edited if the details are recorded incorrectly.
The 'Reference type' can be amended if the wrong type was previously recorded.

- Click the **Save** button

The **References** screen displays.

- Click the **OK** button to return to the **Person summary** screen