Adults Quick Guide

GP Details

When a named GP or GP surgery is added to a person's record, their details will display in **Professional and organisational relationships** on the **Person summary** screen.

To view the details of all (current and historic) named GP relationships click **Person details > Worker relationships** in the extended sidebar menu to access the **Worker relationships** screen.

Important note: The **Worker relationships** screen should only be used to view GP relationships; it should not be used to amend them.

To view the details of all (current and historic) GP surgery relationships click **Person details > Organisational relationships** in the extended sidebar menu to access the **Organisation relationships** screen.

Recording a named GP

A person's GP details should always be reviewed during all case activity. Only one current (open) named GP can be recorded at a time on the person's record.

Important note: If a person's named GP changes, their existing GP will need to be ended before a new GP can be added.

To add a named GP:

- Click **Person details > GP** in the extended sidebar menu or click the **Change** hyperlink against 'GP' within **Professional and organisational relationships**

Note: The 'Change' hyperlink will only be visible if a GP relationship is already recorded.

The **Amend GP** screen displays

- Click the **Find** button

The **Find GP** screen displays

- Search for the GP by typing their surname into the 'Last name' field and click the **Find** button

Search results will display in the low half of the screen

- Click on the name of the relevant GP from the list of **GP Names**

> You must ensure you select the correct named GP based on the surgery the person attends.
>
> If the surgery the GP is showing as based at doesn't match with the GP surgery recorded on the person's record an error message will display within many workflow steps.
>
> This is likely to be a common occurrence for those surgeries with a main surgery and one or more branch surgeries. If a person is registered with a branch surgery, but their named GP is showing as based at the main surgery, there will be a mismatch and the workflow step will display an error message.
>
> To resolve this issue you will need to complete the **Mosaic - Create / Change Professional** form on Freshservice to request the GP's details are updated to show them as based at the relevant branch surgery.

The **Amend GP** screen displays

- **GP Name** = Defaults in based on your search results selection

- **From** = Defaults in with today's date – If required this can be amended using the **date picker** icon

Note: This is the date that you became aware of the GP details not the date the person registered with that GP.

- **To** = Used only when ending a GP Relationship

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

The current GP details will display in **Professional and organisational relationships** on the **Person summary** screen.

To end or amend a named GP:

- Click **Person details > GP** in the extended sidebar menu or click the **Change** hyperlink against 'GP' within **Professional and organisational relationships**

Note: The 'Change' hyperlink will only be visible if a GP relationship is already recorded.

The **Amend GP** screen displays.

Important note: Editing GP details should only be undertaken when a recording error has been made e.g. Incorrect from/to dates recorded or incorrect GP name has been selected.

- **To** = Enter the end date of the GP relationship using the **date picker** icon

> **Important note:**
>
> If ending the GP to add new / updated GP information please use yesterday's date as the 'To' date to ensure the correct GP information shows on the Person summary screen and pulls through into any workflow steps.

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

Any ended GP details, will become historic and will only be visible in the **Worker relationships** screen.

Adding a GP Surgery as an Organisation

Along with a named GP, the GP surgery should also be added as an Organisational relationship, this is required for reporting purposes.

> **Important Notes:**
>
> - The GP surgery can be recorded instead of the named GP if the person does not have a named GP, or this has not been obtained, but the GP surgery is known.
>
> - If a person is not registered with a GP surgery the value **'Not currently registered with a GP Practice'** should be recorded as the GP surgery
>
> - If the person's GP surgery has not yet been obtained the value **'GP Practice not known'** should be recorded as the GP surgery

The GP surgery can be added to the person's record via the **Person details > Organisational relationships** in the extended sidebar menu or by clicking the **Change** hyperlink against 'Organisational' within **Professional and organisational relationships**.

Note: The 'Change' hyperlink will only be visible if at least one organisational relationship is already recorded.

The **Organisation relationships** screen displays

- Click the **Add** button to record the GP surgery details

The **Add organisation relationships** screen displays

- Click the **Find** button to start a search

The **Find organisation** screen displays

- Perform a search for the surgery by name, ID number, street or post code and click on the **Find** button

The **Find organisation** screen displays

- Click on the **name** hyperlink for the relevant GP surgery to select it.

The **Add organisation relationships** screen displays

- **Organisation** = Defaults in based on your search results selection

- **Relationship Type** = Select **GP Surgery** from the dropdown menu

- **From** = Defaults in with today's date – If required this can be amended using the **date picker** icon

Note: This is the date that you became aware of the GP surgery details not the date the person registered at that surgery.

- **To** = Used only when ending a GP surgery relationship

- Click the **Save** button

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

The GP surgery name will display within **Professional and organisational relationships** on the **Person summary** screen

To end or amend a GP surgery –

- Click **Person details > Organisational relationships** in the extended sidebar menu

The **Organisation relationships** screen displays.

Important note: Editing GP surgery details should only be undertaken when a recording error has been made e.g. Incorrect from/to dates recorded or incorrect GP surgery has been selected.

- Click on the **Edit pencil** icon for the GP Surgery

The **Amend organisation relationships** screen displays

- **To** = Enter the end date of the GP surgery relationship using the **date picker** icon

> **Important note:**
>
> If ending the GP surgery to add new / updated surgery information please use yesterday's date as the 'To' date to ensure the correct GP surgery information shows on the Person summary screen and pulls through into any workflow steps.

- **End Reason** = Select the appropriate value – note there is a value of 'GP Surgery Details Changed'

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

Any ended GP surgery details, will remain visible in **Professional and organisational relationships** until midnight of the end date. They will then become historic and will only be visible in the **Organisation relationships** screen.

GP information in Workflow Steps

GP information is mandatory in many workflow steps. It cannot be directly recorded within a form; instead it pulls through from the information recorded on the person's record.

If a named GP is recorded it will pull through into the form.

If a named GP is not recorded, but a GP surgery is, that will pull through into the form.

If both a named GP and GP surgery are recorded the named GP will pull through into the form.

If neither a named GP nor GP surgery are record you will see the following message:

⚠ ERROR: A named GP or GP Surgery should be recorded in the 'Person Summary' screen

You will need to then either add the named GP and GP surgery to the record or use one of the following values as the GP surgery:

- o **Not currently registered with a GP Practice** = If a person is not registered with a GP surgery

- o **GP Practice not known** = If the person's GP surgery has not yet been obtained

To do this:

- Click the **Show subject summary** icon to minimise the workflow step window

- Follow the process as described above to add the named GP and / or GP surgery

- Maximise the workflow step window and click the **Refresh current form** icon to pull the information into the workflow step

If the value of **GP Practice not known** is added, or was already recorded on the record you will see the following message:

> ⚠ GP Surgery is currently recorded as 'GP Practice not known'. Please update record if information is now known, otherwise tick box below.

☐ Please confirm that the person is still not currently registered with a GP Practice, or that the name of the Practice continues to be unknown

You will have to either update the record if the information is now known or tick the checkbox to confirm the information is still unknown.
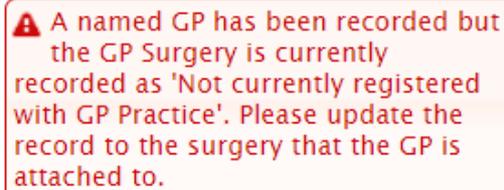
If the value of **Not currently registered with a GP Practice** is added, or was already recorded on the record you will see the following message:

> ⚠ GP Surgery is currently recorded as 'Not currently registered with GP Practice'. Please update record if information is now known, otherwise tick box below.

☐ Please confirm that the person is still not currently registered with a GP Practice, or that the name of the Practice continues to be unknown

You will have to either update the record if the person is now registered or tick the checkbox to confirm the information is still correct.

If the named GP and GP surgery information do not match e.g. GP is listed at one surgery and a different surgery or one of these 'not known / not registered' values are recorded you will see an appropriate message such as the following:

> ⚠ A named GP has been recorded but the GP Surgery is currently recorded as 'Not currently registered with GP Practice'. Please update the record to the surgery that the GP is attached to.

This is likely to be a common occurrence for those surgeries with a main surgery and one or more branch surgeries. If a person is registered with a branch surgery, but their named GP is showing as based at the main surgery, there will be a mismatch and the workflow step will display an error message.

To resolve this issue you will need to complete the **Create / Change Professional** form on My Portal to request the GP's details are updated to show them as based at the relevant branch surgery.

You will have to update the record to remove (end) the incorrect named GP or GP surgery information and then add the correct details where needed.

> Remember when ending an old/incorrect named GP or GP surgery to add new/correct details, you must use **yesterday's date** as the 'To' (end) date to ensure the correct details pull through into any workflow steps.