ENROLMENT AND ELIGIBILITY

New patient enrolment

Enrol a new patient so the enrolment is valid, correctly funded, and compliant with the Foundation Standard, with the form, the eligibility check, and the National Enrolment Service submission all done in the right order.

Who it is for: Reception and admin staff enrolling a new or returning patient.

You will need: The signed enrolment form, proof of eligibility, and the patient's NHI if known.

The steps

1. Check the patient has completed, signed and dated the enrolment form, including the privacy statement. An unsigned form is not a valid enrolment.
2. Sight and record proof of eligibility, following the eligibility tree. Record ethnicity exactly as the patient identifies it, never assumed or copied from another field.
3. Confirm the patient is not currently enrolled at another practice in a way that would clash, and verify their identity against photo ID where your practice requires it.
4. Create the patient record in Medtech, following the steps below.
5. Submit the enrolment through the National Enrolment Service so the NHI and demographics validate and capitation funding flows correctly.
6. File the signed form against **[your retention policy]** and set the patient's first appointment if they need one.

Creating the record in Medtech

1. Open a new patient record and enter the NHI, or use the NHI lookup if you do not have it yet.
2. Enter the patient's demographics and confirm the address so the eSAM validation passes.
3. Set the registration and funding details, including provider and enrolment status.
4. Save the record and confirm the enrolment status shows as expected before moving on.

WATCH OUT

If eligibility cannot be confirmed, do not enrol the patient as eligible. A casual or ineligible patient is recorded and charged differently. Never guess eligibility or ethnicity to move things along, it affects funding and the patient's record.