

## TRANSFERS

# Receiving records in

Receive and file an incoming record against the right patient quickly and safely.

**Who it is for:** Reception and admin staff receiving a transfer in.

**You will need:** The incoming record, the patient's enrolment, and your practice management system.

## The steps

1. Match the record to the patient by name, date of birth and NHI before filing anything.
2. Import or attach the record to the correct patient in your system.
3. Flag anything urgent, such as recent results, alerts or current medications, to a clinician rather than just filing it.
4. Check the enrolment is complete so the patient is funded and on recalls.
5. Record that the record was received and filed, with the date.

## Filing the record in Medtech

1. Open the patient's record and confirm the NHI matches.
2. Import the GP2GP record, or attach the file through the attachment manager.
3. Route any urgent items to the right provider's inbox.

### WATCH OUT

Never file an incoming record without matching it to the right patient first. A record filed to the wrong patient is a serious safety risk.