SYMPHONY QUICK REFERENCE GUIDE

Search for a patient, Update a Patient Record, Register a New Patient, Create an ED Episode

NHS University Hospitals Sussex NHS Foundation Trust
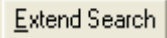
SEARCH FOR A PATIENT

- Click [Search] on the patient banner

Search in the following order:

Remember to clear previous search criteria between searches:

1. Enter the patient's NHS number in the Number field, click **Find, OR**
2. Enter the patient's Date of Birth in the format *07/06/1954*, click **Find, OR**
3. Enter a partial Surname and Forename, click **Find**

Results:

- A List of Patients displays, this may be 1 person or 100s
- Double-click on the required patient to display the **Patient Details** screen
- If the required patient is not listed, click on [Extend Search] (if available) for Symphony to complete further search options

Patient found: Check and update the patient's details. Click the **Close** button on the Patient Details screen to place patient on the banner.

Patient not found: Try another search option, including different spellings of the name.

You should only register a new patient record, when all search options have been exhausted.

UPDATE PATIENT DETAILS

From the *Patient Details* screen:

- Click on the button on the left-hand side which relates to the information you need to update.
- On the *Name, Details* and *Indicators* sections add new or overtype existing details and click the **Finish** button.

Update Address:

- Highlight the address to be changed if more than 1. This displays the current details in the fields.

Care: The Clear All and Remove buttons will remove all data from the fields, including the phone numbers

- Click into the 1st line of the address.
- The Symphony Postcoder window may display, if so:
  - Enter the postcode or some of the address separated by commas and click **Find**
  - Select the correct address from the list
- If there is no Postcoder, overtype the address using Upper and Lower case appropriately
- Update phone numbers as required
- Select **Yes** in the *Is this an address move* field
- Click the **Update** button and then **Finish**

Update GP Details

- Follow the instructions in the Register a patient section
- Select Yes in the *Is this a GP move* field

Update Relationships (Next of Kin etc.)

- Cancel the pop-up *NOK Type* window
  - To update an existing NoK, highlight the NoK to be changed, overtype the details and click the **Update** button.
  - To enter a new NoK, click the **Clear All** button. Enter new details and click the **Add** button.
  - To delete a NoK, highlight the NoK and click the **Remove** button.
  - Click the **Finish** button

When all details have been updated:

Click the **Close** button to save and close the Patient Details screen. The patient displays in the patient banner

REGISTER A NEW PATIENT RECORD

After you have tried multiple search options and confirmed that the patient record does not exist:
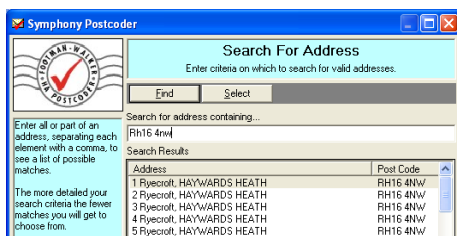
From the **Patient Search** screen:

Click [Register New Patient]

Name screen

Complete each field (except Age, which will auto-populate from the DoB) and then click *Next*

Address

- Select Permanent Address.

- The Symphony Postcoder window may display, if so:

- Enter the postcode or some of the address separated by commas and click *Find*

e.g. Rh16 4nw
50 Ryecroft, Haywards Heath

- Select the correct address from list.

- If there is no Postcoder, type the address using Upper and Lower case appropriately

- Enter telephone numbers and click the **Add** button.

- Repeat for a Temporary address if required and click *Next*

Employment / Religion Details

- Complete each field and click *Next*

GP Details

- Click on the **Find GP** button

- Enter the GP surname and/or any known part of the GP's address e.g. Brighton in the relevant field and click *Search*

A list of matching GP details displays – sort by clicking on the column header
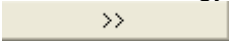
- Double-click on the correct GP

- If the patient is an overseas resident or not registered with a GP, type *V81998* in the *GP Practice Code* field and click *Search.*

- If the GP Practice is unknown, type *V81999* in the *GP Practice Code* field and click *Search*.

- When finished click *Next*

Relationships

- Select NoK Type – you can only have 1 Primary – this is the main one.

- If the NoK has the same address as the patient click Copy from patient

- If the NoK has the same surname as the patient click Copy Name from Patient

- Complete the remaining fields and click the **Add** button

- Repeat to add more NoK if required but change the Type

- When finished click *Next*

Allergies / Special Needs Indicators

As appropriate:

- Select the allergy from the list and click >> . Repeat for each allergy and click *OK.*

- Repeat for Special Needs and then click *Next*

Numbers - Ignore this screen: Click *Cancel* to close the *Number Type* window.

then click *Finish*

Patient Details screen

The patient details display

- Click on the Close button to save and close the new patient record.

The Patient displays on the Patient Banner.

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CREATE AN ED EPISODE

- Find or register the patient and ensure their details are displayed in the Patient Banner.

- Select ED Episode on the *Next Action Menu*

- Select a new attendance or re-attendance as appropriate at the required hospital. Click *Next*

- Complete all fields. Blue fields are mandatory.

- Additional screens / fields may display based on the data you enter.

- Enter brief details of the complaint. Care: what you enter appears on the GP letter

- Remember: the Care Group you select may determine where and when the A&E Card is printed.

- Click on the appropriate icon to record the patient's location in the department.

 Click the **Finish** button

The Patient will appear on the Patient List.