New Enrolled Patient Checklist

|  |  |
| --- | --- |
| **Patient name:** | |
| **DOB:** | |
| **NHI:** | **Provider:** |

# Administration

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Electronic notes received |  | Electronic notes not received |  | Electronic notes not sent |
|  | GP2GP received and imported |  | GP2GP not sent | | |
|  | Paper notes received |  | None available to be sent | | |
|  | Notes arrival recorded in Medtech | | | | |
|  | Acknowledgement sent to old practice | | |  | Not requested |
|  | Patients “records request” task completed | | | | |
|  | NHI entered/checked | | | | |
|  | Family linked (if appropriate) | | |  | No family |
|  | Accounts linked (if appropriate) | | | | |
|  | Smoking status entered | | |  | Under 16 |
|  | AIR notified of new patient (if born after 28/11/2005) | | |  | N/A |
|  | AIR Status Query sent and imported if a child born after 28/11/2005 | | |  | N/A |
| **Completed by:** | | | | **Date:** | |

# Clinical

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Complete **all** sections below. Record if info is not available. | | | | |
| Nurse and GP section | | | | |
|  | Notes checked |  | High needs/Care+ eligibility determined | |
|  | Screenings entered |  | Immunisations checked | |
|  | Recalls added |  | Medicine reconciliation | |
|  | Alerts added |  | Long-term meds recorded | |
|  | Classifications checked |  | Medical warnings checked | |
| **Completed by:** | | | | **Date:** |

# Final steps

|  |  |  |
| --- | --- | --- |
|  | Returned to admin team | |
|  | New patient notes task completed | |
|  | Sent to be filed in patient record | |
| **Completed by:** | | **Date:** |