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:** |