



STB 50 PERFORMING A PDS TRACE – QUICK REFERENCE GUIDE FOR CALL HANDLERS

NAME: _____ (PLEASE PRINT CLEARLY)

DATE OF BRIEFING: _____

BRIEFED BY: _____

STB 50: Performing a PDS Trace – Quick Reference Guide

The purpose of this Service-Training Brief is to assist us in the service we provide to our customers.

The Training Team/Co-ordinator is responsible for delivering this brief to staff. Please sign the front page of the brief, this will then be kept in your training file and the information recorded on Badger systems. The brief content pages may be kept for reference as required.

The information contained in this brief supersedes all previous communications, manuals or procedures.

STB 50 – Performing a PDS Trace – Quick Reference Guide	Signed
I have received a face to face briefing	
I fully understand the briefing and will implement this training.	
I have discussed any queries.	

STB	Date
Added to Rotamaster	

VERSION CONTROL

DATE	CHANGE	CHANGED BY
08/03/2013	Original Version	CG
14/12/2015	Reviewed – No changes	CY
24/07/2018	Reviewed	SBi
28/05/2020	Reviewed – Minor changes	SBi

PERFORMING A PDS TRACE – QUICK REFERENCE GUIDE FOR CALL HANDLERS

1. Patient Search

Perform a patient search in 'Case Entry' and select the appropriate patient record. If there is not an existing patient record, enter the details into 'Case Entry' before searching PDS:

The screenshot shows the 'Case entry' form with the following fields and annotations:

- Surname:** Lassinan (Annotated with an arrow from the text box: "Enter the patient's surname, date of birth & gender.")
- DOB:** 17-Mar-2009 (Annotated with an arrow from the text box)
- Sex:** Female (Annotated with an arrow from the text box)
- Lookup button:** Located in the 'Language & Ethnicity' section, highlighted with a red box and annotated with an arrow from the text box: "Click on 'Lookup' to perform a PDS lookup."

2. PDS Trace

If this is the first time a PDS lookup has been performed or no record was found previously, the 'National Personal Demographic Search' screen will be displayed:

The screenshot shows the 'National Personal Demographic Search' form with the following details:

- Search Criteria:** Surname: Nic-Donotuse, Date of Birth / Age: 27-Jun-1955 (56 years), Gender: Female, Postcode: BD5 8LY.
- Search Results Table:**

NHS Number	Forename	Surname	Gender	DOB	Address	Postcode
999 006 5934	Nic-Donotuse	Xxtestpati...	Female	27-Jun-1955	374 Bradford Road, Bradford, Bradford	BD5 8LY
- Annotation:** A text box points to the first record in the table: "If the patient record was found, double-click on the record and proceed to Section Four."

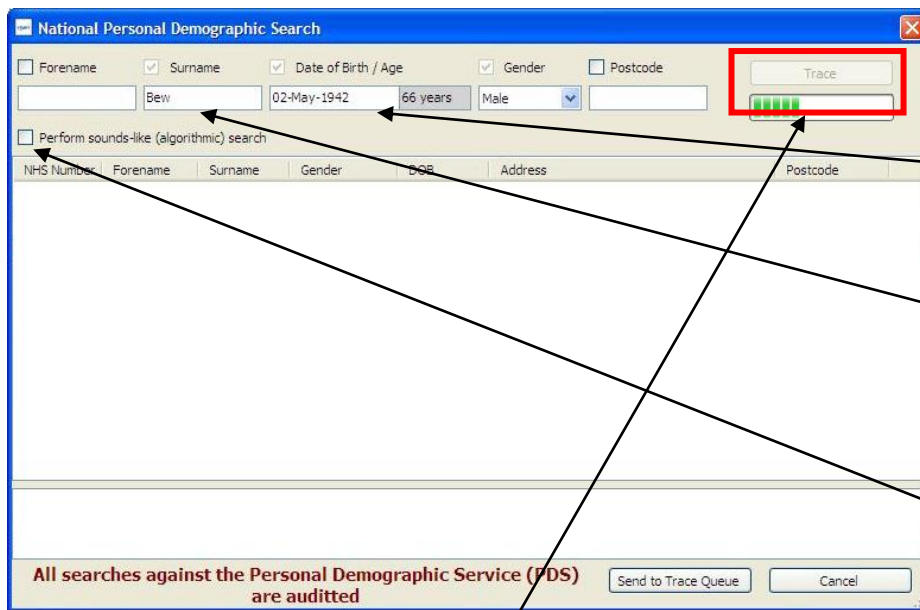
3. Advanced Search

If no matches are found when searching for a patient record, the following message will be displayed:



Click 'OK' to perform an Advanced Search.

The 'National Personal Demographic Search' screen will be displayed again. Edit the details as necessary.



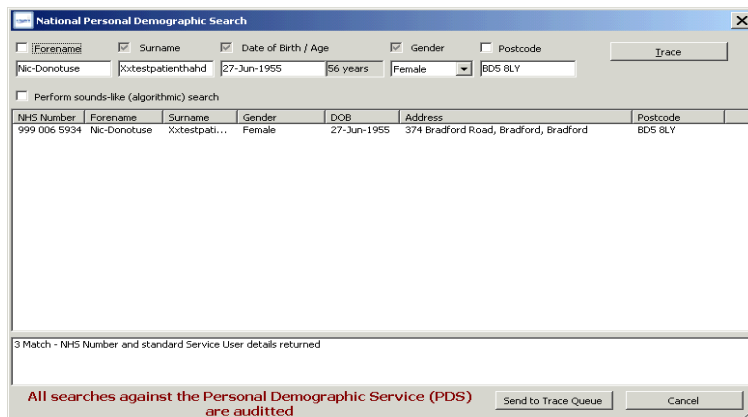
Leave the date of birth field blank if it is not necessarily accurate.

Enter at least the first 2 characters of the surname & an asterisk (*) to perform a wildcard search.

Tick this box to perform a search on surname 'sounds like'.

Click on the 'Trace' button.

If one or more records are found, confirm details as required to identify the patient and double-click on the correct record.



4. PDS Retrieval

The following screen will be displayed once a successful PDS trace has been performed:

Details entered	Results	Copy?
Name: N Namdev Raji	Namdev Raji	<input type="checkbox"/>
Address: 24 Queen Street Tideswell Buxton SK17 8PF	24 Queen Street Tideswell Buxton Derbyshire SK17 8PF	<input checked="" type="checkbox"/>
DOB: 11-Jun-08	11-Jun-08	<input type="checkbox"/>
Gender: Male	Male	<input type="checkbox"/>
NHS number: 943 661 5663	943 661 5663	<input type="checkbox"/>
Home Phone: 01233 722700		<input type="checkbox"/>
Doctor: Baars, TPJ		
Surgery: Baars		

Buttons: Send to Trace Queue, Back, Cancel, OK

You will be taken back to the 'Case Entry' screen, where you can continue to enter and store the case as normal. Once a PDS match has been achieved, the NHS number field will be highlighted green.

Buttons: Lookup

NHS Number: 943 661 5663

If you are unable to find a match, click on the 'Send to Trace Queue' button to continue with case entry. The patient record will go into a separate queue so that matching can be performed later.

Buttons: Send to Trace Queue, Back, Cancel, OK