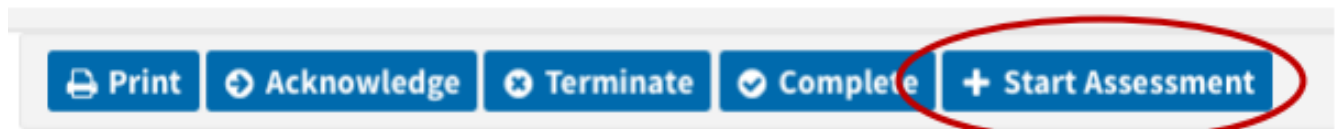


### 3. Link, Acknowledge and Unlink Service Requests

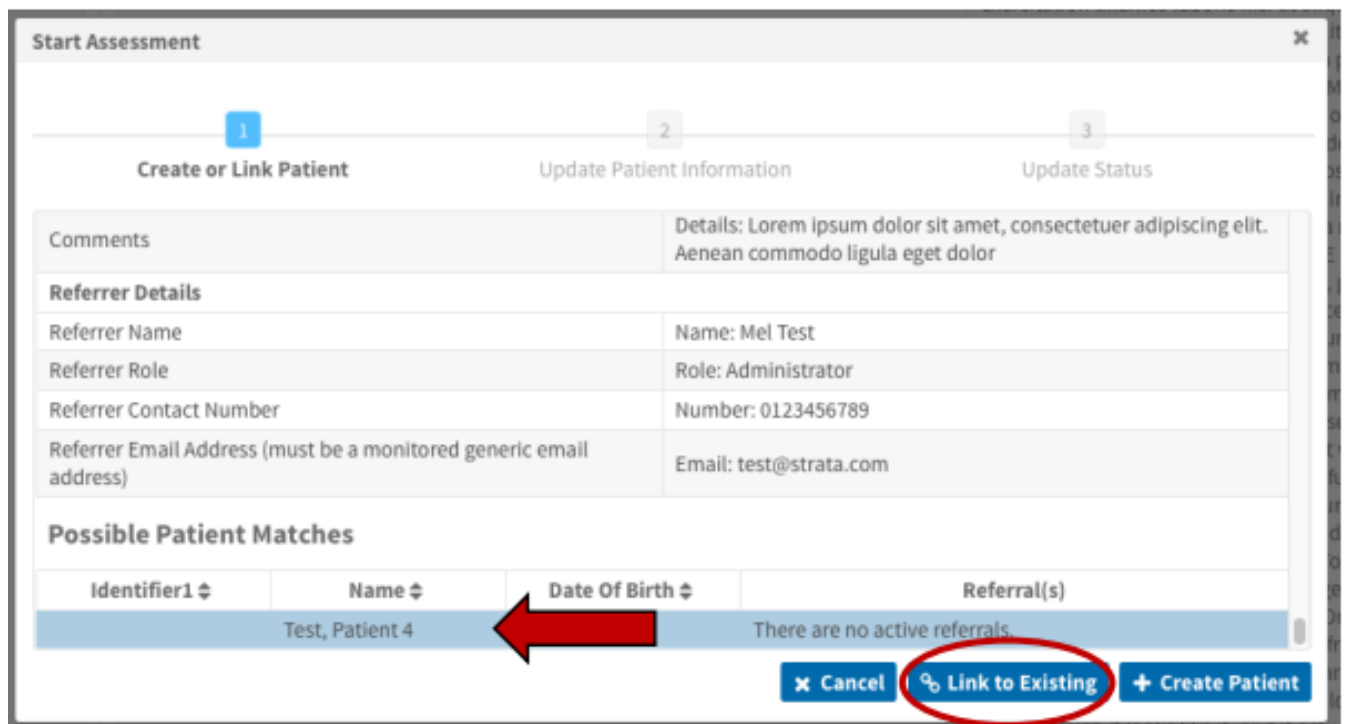
## How to link a Service Request to an existing patient record

To determine if this patient exists in PathWays, click on +Start Assessment



In the window that opens, scroll to the bottom of the information displayed. If a Possible Patient Match exists in PathWays, they will be listed here.

Select this patient by clicking on the row next to their name. The row will highlight blue. Then click Link to Existing.



Identifier1	Name	Date Of Birth	Referral(s)
	Test, Patient 4		There are no active referrals.

In the window that opens, a new column appears capturing the patient details

of the record the request has been linked to.

The screenshot shows a 'Start Assessment' window with three steps: 1. Create or Link Patient, 2. Update Patient Information (highlighted), and 3. Update Status. The patient is identified as 'Patient 4 Test' with 'Active Referrals: None'. Below is a table comparing 'Request' and 'Patient' information for 'Demographics'.

Category/Attribute	Request	Patient	
<b>Demographics</b>			
Patient Name: Surname	Test	Test	
Patient Name: Forename	Patient 4	Patient 4	
Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Postcode	XX3 4YY		

At the bottom, there are three buttons: 'Cancel', 'Merge Contents', and 'Next Step'. A red arrow points to the 'Patient' column header in the table.

Scroll through the information to determine if there are any differences between the Request and the existing patient record in PathWays.

To pull the information from the Request into the PathWays record, use the Merge Contents button.

**Start Assessment**

1 Create or Link Patient      2 Update Patient Information      3 Update Status

Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Postcode	XX3 4YY		
Patient Address: City	Town		
Patient Address: Street Address	25 Green St		
Patient Main Phone Number: Phone Number	xxxxx		
Next of Kin / Emergency Contact Details: Relationship / Legal status	Married		
Next of Kin / Emergency Contact Details: Address	25 Green St		

1 of 4    < 1 2 3 4 >

This action updates the patient record in PathWays with the information provided in the Service Request.

**Start Assessment**

1 Create or Link Patient      2 Update Patient Information      3 Update Status

Date of Birth: DOB	06-06-1955	06-06-1955	
Mosaic ID: Mosaic ID	235689	235689	
Patient Address: Street Address	25 Green St	25 Green St	
Patient Address: City	Town	Town	
Patient Address: Postcode	XX3 4YY	XX3 4YY	
Patient Main Phone Number: Phone Number	xxxxx	xxxxx	
Next of Kin / Emergency Contact Details: Next of Kin Name	John Smith	John Smith	
Next of Kin / Emergency Contact Details: Address	25 Green St	25 Green St	

1 of 4    < 1 2 3 4 >

If further editing is required, use the pencil icon on the far right-side of the window.

By clicking on this icon, you are able to manually update the patient record in

PathWays.

The screenshot shows a 'Start Assessment' window with three steps: 1. Create or Link Patient, 2. Update Patient Information, and 3. Update Status. Step 2 is active. A table displays patient details with edit icons in the right column, which are circled in red.

Field	Value	Value	Action
Date of Birth: DOB	06-06-1955	06-06-1955	[Edit]
Mosaic ID: Mosaic ID	235689	235689	[Edit]
Patient Address: Street Address	25 Green St	25 Green St	[Edit]
Patient Address: City	Town	Town	[Edit]
Patient Address: Postcode	XX3 4YY	XX3 4YY	[Edit]
Patient Main Phone Number: Phone Number	XXXXX	XXXXX	[Edit]
Next of Kin / Emergency Contact Details: Next of Kin Name	John Smith	John Smith	[Edit]
Next of Kin / Emergency Contact Details: Address	25 Green St	25 Green St	[Checkmark] [X]

1 of 4 | [Previous] [1] [2] [3] [4] [Next]

[Cancel] [Merge Contents] [Next Step]

## How to Acknowledge a Service Request

After linking & merging a Service Request to an existing patient, click Next Step within the window.



In the window that opens, click on the Acknowledge button. This action formally accepts this Service Request.

Start Assessment

1 Create or Link Patient      2 Update Patient Information      3 Update Status

— XX XX

Active Referrals: None

Current Status: **New**

Comment

× Cancel    Acknowledge    Complete

It is also possible to Acknowledge the Service Request upon opening the request and using the blue Acknowledge button

Print    Acknowledge    Terminate    Complete    Start Assessment

Add any relevant comments into the window that opens and click Continue.

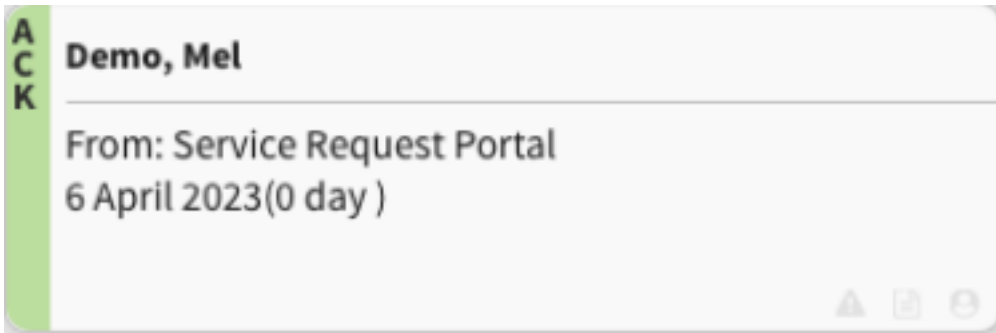
Acknowledge The Service Request

Current Status: **New**

Comment

× Cancel    Continue

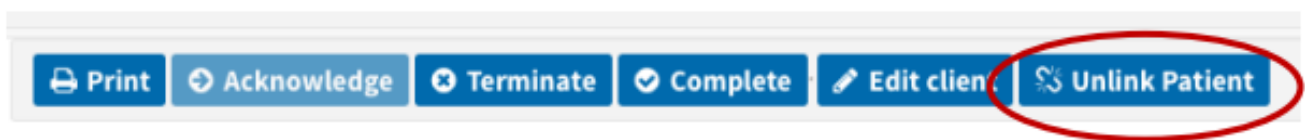
The Service Request tile status will update.



Note - Acknowledging a Service Request will simultaneously start a care type (referral) for the patient.

## How to Unlink a patient record

If appropriate, you can unlink the patient by clicking on the Unlink Patient button.



Confirm the action within the window that opens, by clicking on Yes.

The Service Request is now unlinked to the previous record. If no further possible patient matches are available, a new patient record must be created.

Online URL: <https://elearning.cornwall.nhs.uk/site/kb/article.php?id=338>