

TRACING IN – STEP BY STEP GUIDE

Log in to Emis



Go to appointment book – Today



Go to the HDrive folder in documents



Select 'services'



Select 'Extended access service'



Select 'apt booking report'



Open the document 'text appointment checklist'



Print appointment check list (use this to keep a check on which patients have been Traced In)



Go back on to appointment book



Right click on patient's name that appears in the wrong format eg. ' charlotte james '



Select 'Slot properties..'



In the notes there will be the patients NHS number copied in the notes box (if no NHS number call GP practice who booked it and ask for patients NHS number)



Copy patients NHS number



Select patient Trace on the top left hand corner (wand symbol)



Paste NHS number into box that says 'NHS number'



Find



Check if the Patient matches the name written on the appointment book



Select patient



Check that the patient details appear in the blue bar at the top of the appointment book



Go back to the appointment book right click on the patient's name



Cancel appointment



Select the same appointment slot



Right click



Book current patient



The patient will appear in the proper format eg. ' JAMES, Charlotte '

