

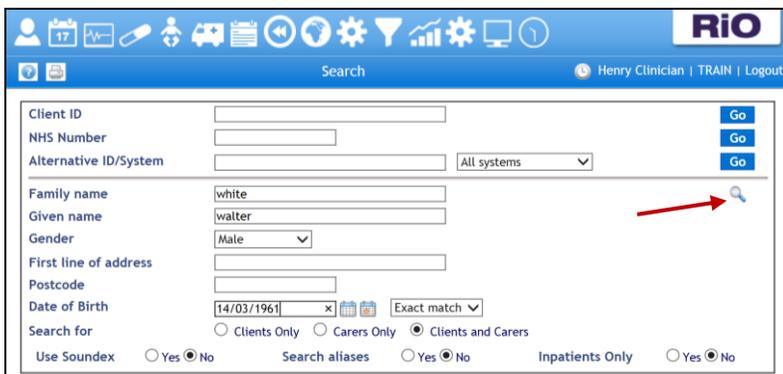
RiO - Searching

Good Practice

When you attempt to find a patient – the system will search locally first. Use the NHS number or the minimum dataset of surname (family name), forename (given name), date of birth and gender.

If the patient has not had any activity locally - you will not be able to find the patient and the system will allow you to register the patient – this means tracing the patient from the Personal Demographics Service on the Spine. This database holds details of all patients registered with a GP in England and Wales. Use the NHS number or the minimum dataset – you should be able to find your patient.

- Use the **NHS number** as it is unique and should only retrieve the correct record
- Check **No** for **Soundex** and **Alias**. Only check **Yes** if your initial search has not found the patient
- If you don't know the **Date of Birth** then de-select **Exact match** and instead select a date range
- If the patient is present ask how *they* spell their name as it may be different to conventional spelling
- Check if they use a shortened version of their given name – e.g. “Chris” instead of “Christopher”, or an alias e.g. David Andrew Armstrong may call himself Andy Armstrong
- If you are unsure of the spelling of names a **Wildcard** (*) search can be used. Don't use a wildcard search that is likely to match a large number of records e.g. only with a surname.



The screenshot shows the RiO search interface. At the top, there is a navigation bar with the RiO logo and user information: "Henry Clinician | TRAIN | Logout". Below this is a search form with the following fields and options:

- Client ID: [] [Go]
- NHS Number: [] [Go]
- Alternative ID/System: [] [All systems] [Go]
- Family name: [white] [Search icon]
- Given name: [walter]
- Gender: [Male]
- First line of address: []
- Postcode: []
- Date of Birth: [14/03/1961] [Exact match]
- Search for: Clients Only Carers Only Clients and Carers
- Use Soundex: Yes No
- Search aliases: Yes No
- Inpatients Only: Yes No

At the bottom of the form, there are two buttons: "Search" and "Clear". A red arrow points to the "Search" button.

Enter the **NHS Number** and click **Go**

OR

Enter the **Minimum Dataset** of **Family name, Given name, Gender, Date of Birth**

Ensure **No** is checked for **Use Soundex** and **Search aliases** in your initial search

Click the **Search** icon  or click **Search** (at the foot of the screen)

Client ID	Name	Address	Gender	Date of Birth
1000194	WHITE Walter	21 Midhill Drive Rowley Regis West Midlands B65 9SG	M	14 Mar 2006

Client has Died Client is marked as a Carer

[Return to search criteria](#) [Create New Client Registration](#)

The **Search Results** window will be displayed with the patient or a list of patients

Click on the patient name to display the patient's **Clinical Portal**

If you have not found the correct patient, click **Return to search criteria**

You are attempting to access the record of a client with whom you do not currently have a legitimate relationship. You must, therefore, provide a valid reason for accessing this record.

Reason: Please Select

Comment:

Save Cancel

If you attempt to view a record for a patient that you do not have a legitimate relationship with, the **Access Reason** window will display

To self-claim a legitimate relationship, select a **Reason** and click **Save**

Clinical Portal - Client's View Colin Taylor | TRAIN | Logout

WHITE, Walter DOB: 14 Mar 2006 (10 year(s) old) Gender: Male NHS: N/A

Clinical Indicators

- Hot Recorded
- Conditions
- Allergies
- Consent Not Indicated

Demographics

Name: Walter WHITE
 Client Address: 15 Midhill Drive, Rowley Regis, West Midlands
 Postcode: B65 9SG
 Work Telephone Number: Unknown
 Home Telephone Number: Unknown
 Mobile Telephone Number: 079823456
 Age: 10 years old
 NHS Number: [redacted]
 Gender: Male
 Date Of Birth: 14 Mar 2006 (10 year(s) old)
 Ethnicity: British
 Language spoken: English
 Interpreter required: Not Required
 GP Practice Name: HAYTON OAK MEDICAL PRACT. 01743 362223
 Main Carer: None

Case Record Menu

- Case Record
- Podiatry Documents
- Colleague Granted LR

Click the **RiO** logo  if you wish to return to your default homepage to carry out another search

Search Colin Taylor | TRAIN | Logout

Client ID: 1000153 Mr SILVER Go

Recent Clients: 1000194 Walter WHITE, 1000109 Abel SKELLEY Go

NHS Number: [redacted] Go

Alternative ID/System: [redacted] All systems

Family name: [redacted]

Given name: [redacted]

Gender: Select

First line of address: [redacted]

Postcode: [redacted]

Date of Birth: [redacted] Exact match

Search for: Clients Only Carers Only Clients and Carers

Use Soundex: Yes No Search aliases: Yes No Inpatients Only: Yes No

The **Client ID** field will show the last patient whose clinical portal you have viewed during this log-in session

The **Recent Clients** field will contain a list of other patients whose clinical portal you have viewed during this log-in session

RiO - Search using 'Wildcards'

Client ID:

NHS Number:

Alternative ID/System: All systems

Family name: skelley

Given name: abel

Gender: Male

First line of address:

Postcode:

Date of Birth: 19 June 1921

Search for: Clients Only Carers Only Clients and Carers

Use Soundex: Yes No

Search aliases: Yes No

Inpatients Only: Yes No

Ensure **No** is checked for **Use Soundex** and **Search aliases** in your initial search. This improves the efficiency of your search.

Client ID:

NHS Number:

Alternative ID/System: All systems

Family name: skell*

Given name:

Gender: Not Specified

First line of address:

Postcode:

Date of Birth:

Search for: Clients Only Carers Only Clients and Carers

Use Soundex: Yes No

Search aliases: Yes No

Inpatients Only: Yes No

E.g. You are searching for a patient with the surname of Skelley, but are unsure of the spelling.

Click the **Family name** field and type **Skell*** (Skell followed by an asterisk)

Complete other search fields

Click **Search**

Client ID	Name	Address	Gender	Date of Birth
1000109	SKELLEY Abel	140 Lady Ann Road Batley West Yorkshire WF17 0PS	M	19 Jun 1921

All patients with a surname beginning Skell will be found e.g. including either Skelly or Skelley

Clinical Portal - Client's View

Summary

WHITE, Walter

DOB: 14 Mar 2006 (10 year(s) old) Gender: Male NHS: N/A

Clinical Indicators: Not Recorded, Conditions, Allergies, Consent Not Indicated

Case Record Menu: Case Record, Podiatry Documents, Colleague Granted LR

Demographics

Name: Walter WHITE

Client Address: 15 Midhill Drive, Rowley Regis, West Midlands

Postcode: B65 9SG

Work Telephone Number: Unknown

Home Telephone Number: Unknown

Mobile Telephone Number: 079823456

Age: 10 years old

NHS Number:

Gender: Male

Date Of Birth: 14 Mar 2006 (10 year(s) old)

Ethnicity: British

Language spoken: English

Interpreter required: Not Required

GP Practice Name: MYTTON OAK MEDICAL PRACT, 01743 362223

Main Carer: None

Click on the patient name to display the patient's **Clinical Portal**