

BMC Patient Deduction SOP

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Purpose

To ensure all patient deductions are completed accurately, consistently, and in accordance with NHS England and PCSE guidance. This SOP outlines the steps for verifying patient details, processing deductions, communicating with patients, and ensuring any related access or data matters are handled correctly.

Scope

This procedure applies to all staff responsible for managing patient registrations and deductions within the practice.

Responsibilities

Reception and Administrative Staff:

- Follow this SOP for all patient deductions.
- Verify patient details and confirm reasons for deductions.
- Communicate clearly with patients regarding the process and timeframe.

Practice Manager / Supervisor:

- Oversee the process and handle complex or exceptional cases.
- Ensure staff follow verification and communication procedures.
- Review completed deduction checklists for compliance.

Procedure

1. Identifying Patients for Deduction

A patient may require deduction from the practice list if:

- They have moved out of the catchment area and confirmed registration elsewhere.
- They have transferred to another GP practice.
- They have been deducted automatically by PCSE (e.g., due to deceased status or NHS list cleansing).
- They have requested removal in writing or verbally.

2. Verifying Patient Details

Before completing any deduction:

- Confirm the patient's full name, date of birth, and address.
- Where address change documents are received, verify the address directly with the patient by phone.
- Ensure that any supporting documentation (e.g., correspondence, forms, or PCSE notification) is attached or scanned to the patient record.

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3. Communicating with the Patient

When speaking with the patient:

- Clearly explain that their deduction request is being processed.
- Provide a timeframe for when the deduction is likely to occur.
- Inform the patient that deductions processed over weekends may not be reviewed or updated until the next working day.
- Confirm that once deducted, the patient's registration will end with the practice, and they will need to register with another GP if applicable.

4. Processing the Deduction on EMIS

- Access the patient record.
- Review all open tasks, test results, and communication logs to ensure no outstanding clinical actions.
- Complete the deduction process following EMIS and PCSE guidance.
- Record details of the deduction, including date, reason, and staff member initials, in the patient's consultation notes.

5. Post-Deduction Actions

- If the patient has not changed surgeries (e.g., temporary administrative error or reinstatement required):
 - Ensure the patient's previous online access to medical records is reinstated upon re-registration, provided they have already completed a Subject Access Request (SAR) form or equivalent.
- File or archive all related documentation securely according to data protection policies.

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6. Deduction Verification Checklist

Before completing a deduction, staff must review and confirm the following items:

Checklist Item	Completed (✓)	Notes / Initials
Patient details verified (name, DOB, address) via phone or document check	<input type="checkbox"/>	
Any documents with address change verified with the patient	<input type="checkbox"/>	
Patient informed of deduction process and timeframe	<input type="checkbox"/>	
Patient advised that deductions processed over weekends may not be addressed until next working day	<input type="checkbox"/>	
EMIS record updated, deduction reason documented	<input type="checkbox"/>	
All open tasks/results reviewed and closed prior to deduction	<input type="checkbox"/>	
Online access reinstated if patient re-registers and SAR form already completed	<input type="checkbox"/>	
Relevant documentation attached/scanned to patient record	<input type="checkbox"/>	
Deduction recorded in audit log (if applicable)	<input type="checkbox"/>	

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Version Control

Date	Version	Author	Change Details
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