

1. Find a Patient

- Click on the **EMIS Ball** (top left-hand corner) and select **Find Patient**.
- Enter known **Search Details** for the patient and click the **Search Icon** (magnifying glass).
- Double-click on patient to load **Patient Précis** (blue strip containing a summary of patient details)
- This patient is now the **Active Patient**.

Note: A search using the **EMIS** or **NHS number** will automatically load the **Patient Précis**.

2. Edit Patient Details

- Double-click on the **Patient Précis** or click the **Chevron** (down arrow) on the left side of the bar to expand.
- Click on the green **Edit Patient Details** button (bottom right-hand corner of the précis).
- Make the required changes and click **OK**.

3. Manage Patient Warnings

- Expand the **Patient Précis** bar and click the green **Manage** button (top right of bar).
- In the **Manage Patient Warnings** dialogue box, click the **Add** button.
- Type the required text following your practice guidelines, e.g. **include date/initials** if required.
- Select the **Trigger Point/s** when alert is to be displayed, e.g. when medical record loaded.
- Click **OK** then **Close** the window.

Note: To **Edit** or **Delete** a warning, click the warning to select and choose appropriate option.

4. View Patient Care Record

- Click on the **EMIS Ball** and select **Care Record**.
- If you did not already have an active patient, find patient and **double-click** to select.
- The **Care Record** opens on the **Summary** tab - use the **Tabs** above the **Ribbon** (toolbar) to navigate to

required view, e.g. **Consultations, Medication, Problems**, etc.

5. Add an Admin Note to Patient Record

- In the **Care Record**, choose the **Consultations** tab and click directly on the green **Add** button (top left).
- In **Consultation Properties**, check the default details and amend if required.
- Click the arrow next to **Consultation Type**, choose **Administration Note** and click **OK**.
- Click **Comment** on the left-hand side of the **New Consultation** tab, and begin typing your note in the **Comment Box**.
- If appropriate, choose a code from the **Code Picker**, and continue to **Enter Free Text** if required.
- Click the **Save** icon (top left of ribbon) to close the **New Consultation** tab.

6. Add a Coded Entry without adding a Consultation

- In the **Care Record**, click the **Care History** tab, then click the green **Add** button.
- In the **Add a Code** dialogue box, **Search** for the required **Code**. **Double-click** to select code and enter **Date** and **Descriptive Text** as required.
- Check if the **Record as Problem** box has been ticked by default - untick if appropriate.
- Click **OK** to save.

7. Manage Medications

- In the **Care Record**, click the **Medication** tab.
- The default view is of **Current** medications. To view **Past** medications click the **Calendar/Clock** button in the centre of the ribbon.
- **Select the required Medication** and choose appropriate actions from the **Ribbon**, such as:
 - **Request Issue:** Add free text, choose who you wish to request from (issuer).

- **Reprint:** Enter reason and click **OK**. Only available for 24 hrs after first printed.
- **Issue:** Only available if you are authorised to prescribe.

Tip: To select multiple medications, hold down **Ctrl** + **left-click** on each item.

8. Navigate Appointment Book

- Click on the **EMIS Ball** and choose **Appointments**.
- In your **Session Holder Filters**, e.g. **GP, Practice Nurse**, choose all the sessions you want to view.
- From the ribbon, choose **Day** or **Week View**.
- To view **all appointments** for a specific patient (including past and cancelled), click on the **Patient Appointments** button on the ribbon, then use **Patient Find** to select required patient.

Tip: To search for a specific session holder/clinician, use the **Quick Pick** option.

9. Book an Appointment

Book a slot directly into the Appointment Book:

- Right-click on the required **Appointment Slot** and select **Book Current** or **Book New** patient.
- Enter appointment details and choose appointment letter template if required.
- Click **Book**.

Tip: Use **CTRL+left-click** to highlight more than one slot for extended appointments.

Find and book a specific appointment type:

- Click **Find Slot** on the far left of the Ribbon.
- Use the dropdown arrows to choose the appointment Criteria e.g. date, slot type, session holder/s.

Note: selecting criteria modifies the Available Appointment slots in the lower pane.
- Double-click required appointment to open the **Book Slot** dialogue box, enter details and click **Book**.

10. Cancel an Appointment

- Either select appointment in **Appointment Book**, **right-click** and choose **Cancel Appointment**, *OR*
- Click the **Patient Appointments** button on the ribbon, select patient, **right-click** on the appointment you want to cancel (**NB**: this method is only possible if appointment is in the future).
- Select **Cancel Appointment** and enter the reason for the cancellation if appropriate.

11. Record an Attendance or other Outcome for an Appointment

In the **Appointment Book**, right-click the appointment and hover over **Change Slot Status** to see the options.

Alternatively press these keys on your keyboard:

Surgery Consultations

A – Arrived / **S** - Send in / **L** - Patient has Left

Telephone Appointments

S - Start call / **H** - Telephoned but no answer

Home Visits

V - Visited and seen / **N** - Visited (patient not in)

12. Add a Task in Workflow Manager

- Click on the **EMIS Ball**, then select **Workflow**.
- Choose **Tasks** from tabs on left-hand side of screen.
- On the Ribbon click **Add Task** then select **Task Type**, e.g. Admin Note, Referral, etc.
- Ensure **Subject** shows correct patient - use the **Search** icon (magnifying glass) to change if applicable.
- Select a **Recipient**. For **Multiple Recipients**, ONLY tick 'all recipients to action task' if *everyone* needs to complete the task individually.
- Type details of the task in the **Notes** section. Tick if **Urgent**, and click **Send**.

13. Add a Note to an Existing Task

- Either select task and click **Add Note** on ribbon *OR* **right-click** on task and choose **Add Note**.
- **Type note**, such as: "patient gone out – call on mobile". Click **Close**.

14. Complete a Task with a Note

- From your **To-Do List**, left-click on the task you want to complete and click **Complete** on the Ribbon, *OR* **right-click** on the task.
- Choose **Complete Task**, or **Complete Task with Note** to include supporting information.

Note: If you double-click on a task it will open in a separate tab.

15. Create a Letter using a Template

- In the Care Record **Documents** tab, click the green **Add** button and select **Create Letter**.
- **Double-click** the required template if it is visible, or click on the **Search** icon to find it.
- The template will open in Word - **Edit** as required.
- To change the **Document Name** click the blue **Properties** button on the far left of screen.
- Click the **File** button (next to **Properties**) and select **Print**, if required, or **Save and Close**.

16. Print a Patient Summary

- From the **Summary** screen, click on **Print**.
- Select required **Predefined Summary** *OR* to create your own, click on **User Defined Summary** and select required items.
- Click **Print** and the summary will open as a **Word Document** – choose either to **Print** or **Save**.

For further information on training and support please contact the Admin Team:

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✉: training.scwcsu@nhs.net

Website Resources: www.training.scwcsu.nhs.uk



South, Central and West
Commissioning Support Unit

EMIS Web for New Starters

A Handy Guide for GP Practices

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