Introduction
Admin/Clinical
User Guide
V1.0
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USER GUIDE DISCLAIMER:
Introduction:
This user guide is aimed at providing each delegate with a basic introduction to Emis Web. Delegates will still require specific role-based training within their organisation and this is highly recommended. It is a legal responsibility to protect Patient confidentiality. The responsibility for safeguarding and using confidential information appropriately rests with each organisation.

Overview of Emis Web

Emis solutions are in every major healthcare setting – from GP surgeries to high street pharmacies, community care, hospitals and hospices. The diagram below provides you with an idea of how many different aspect of Emis Health there are.

What is the Spine:
The Spine consists of a number of integrated computer systems and databases that deal with different types of information:

The aim of the Spine is to provide a national shared summary of patient information so that health professionals in England can share data quickly and effectively and have access to up-to-date information.

- **Patient Demographic data:** (name, address, date of birth): the Precis Bar appears when a patient record is open and shows various details about the patient (if recorded).
- **Electronic Prescriptions (EPS):**
  - Enables the digital signing and electronic transmission of prescriptions directly to a dispenser of the patient’s choice, with no need for a paper prescription.
  - To produce electronic prescriptions, prescribers must:
    - Users must log on with their Smartcard
    - Prescribe using a valid Dictionary of Medicines and Devices (DM+D) code.
    - Prescribe by number not packs.
  - To receive electronic prescriptions, patients must:
    - The patient must be registered on the spine, with full GMS status and have a valid NHS number.
    - The patient should have a nominated Pharmacy.
- **Summary Care Record (SCR):**
The Summary Care Record (SCR) is a summary of a patient's GP medical record uploaded to Spine so that it can be accessed by any legitimate carer, regardless of the computer system they use.

The circumstances when this is beneficial include when a patient is seen at a hospital or Out of Hours unit or when a temporary resident is seen at a GP practice.

The National N3 SPINE Care Record Service runs up and down the country and contains summary care records and information from all clinical systems such as SystmOne, Emis Web, and other spine linked clinical systems.

When a patient is registered to GP Surgeries or Community Units

- **GP2GP Transfers:**
  - **NOTE:** You must be logged on with your Smartcard to be able to perform a GP2GP transfer.
  - Most of the GP2GP process is automated, meaning that very little user input is needed. The GP2GP process takes place between the new organisation where the patient is registering (the requesting organisation) and the patient’s old organisation, where their medical records are stored (the sending organisation).
  - The GP2GP process is initialised at the point of patient registration. If the sending organisation is enabled for GP2GP and the patient has a full GMS registration status from an organisation in England, an automatic request for the patient record at the sending organisation is made and an automatic extract will take place. This is a requirement of the clinical profession and meets the strict legal and regulatory arrangement that, as soon as the patient is accepted by the requesting organisation, they have assumed responsibility for the patient.
  - This request is sent in the background during the registration process and is in the form of a ‘GP2GP Transfer Workflow task. The Workflow task will show the following details:
    - Patient Name: the patient’s name.
    - Action by Date: when the task must be actioned by.
    - Created by: who the task was created by.
    - Created Date: the date the task was created.

**Governance, Security and Information Auditing:**

Remember to Lock your PC (press either the Windows Key and or use the Ctrl+Alt+Delete then Lock this Computer) if moving away from your desk/work area as leaving data visible to others is not appropriate – reference to Information Governance and Clinical Security.

- **Log Off** - If you are going out of the office/building for meetings or home visits etc., you should actually Log off the system and your PC. (Think about the fact that you may not come back into the office depending on the situation.)
- **Role-based access controls** – what people can do on the system and the information that they can access depends on their role and the type of activities they carry out. These are on your smartcard.
- **Smartcard:**
  - NEVER SHARE YOUR SMARTCARDS,
  - Before you can start using your Smartcard, you must first activate it.
  - The activation process involves using Emis Web to associate (or "match") your Smartcard with your normal Emis Web user name and to confirm your employment role within your organisation. ****You only need to carry out the activation process once.****
  - YOU are responsible for your Smartcard! **NOTE:** If you lose your Smartcard you must report it immediately to both the Helpdesk on 0345 140 8000 and your line manager.
  - You will need to identify who your Password & System Administrators are within the service.
- **Audit Trails** - All user activity on patient records in EMIS Web is auditable, even just selecting a patient and viewing their record, and the log includes your name and role. You can’t edit or delete audit trail entries.
- **Alerts** – an alert is raised, then investigated if access to confidential Patient information may have been inappropriate.
Log on to Emis Web:

Smartcards are used to protect the security and confidentiality of patient information in the NHS, by determining who has access to a patient’s record and which parts of that record they can see. This helps to prevent the system being used maliciously to view and/or change patient care records, potentially causing patient harm. It is therefore imperative that you keep your smartcard safe at all times and do not disclose your passcode to anyone. Smartcards store security information about a user, and the user’s role(s). Your local RA administers the registration process and issues to each staff member:

- A smartcard that stores security information and the user’s role(s).
- A unique passcode.

We recommend that you always log on to EMIS Web using a smartcard. You can access EMIS Web without a smartcard, but if you do so, you can’t use Spine functionality.

Two ways to log in:

Option 1 – Manual User Name and Password Access:

If you log on to EMIS Web without a smartcard you cannot use any Spine functionality.

- On the desktop, double-click the EMIS Web icon.
  - The EMIS Web logon screen is displayed.
  - If you cannot log on, use the Status Page link to view any known issues with EMIS Web.
  - In the Username field, type your username.
  - In the Password field, type your password.
  - Your organisation ID is automatically displayed in the Organisation ID field. If you want to log on using an organisation ID other than your usual one for any reason, type the required organisation ID.
  - Click Sign In, or press ENTER.
  - On the Role Selection screen, select your role.
  - You must select the correct role for the job you are going to be doing. If you select the wrong role, you may not be able to access the areas of EMIS Web and/or the patients that you need. Your currently selected role, your username and your currently selected location are all displayed in the Status bar at the bottom of all EMIS Web screens and on the EMIS Web homepage.
Option 2 - NHS Smart Card Access:

- No one should use the system without using their own smart card.

- Using your Smart card will ensure that you are connected to the spine.
  - Place your smartcard into the smartcard reader.
  - The Authenticate screen is displayed.
  - Enter your passcode / pin
    - If you type your PIN incorrectly three consecutive times, your smartcard becomes invalid and you must contact your practice manager or local system administrator.
  - If required, on the Role Selection screen, select the appropriate role.
    - If you only have one role, that role is displayed by default.
  - The Authenticate icon is displayed in the system tray at the bottom of the screen, to show that the software is active and your smartcard is working.
- On the desktop, double-click the EMIS Web icon.
  - The EMIS Web homepage is displayed.

Synchronise a smartcard
All users will need to synchronise their smartcard when they log on to EMIS Web using a smartcard for the first time. To log on to EMIS Web after your smartcard has been assigned to your EMIS Web account, you only need to insert your smartcard, type your smartcard passcode (personal identification number (PIN)), and then double-click the EMIS Web icon on the desktop.

- Using your Smart card will ensure that you are connected to the spine.
  - Place your smartcard into the smartcard reader.
  - The Authenticate screen is displayed.
  - Enter your passcode / pin
    - If you type your PIN incorrectly three consecutive times, your smartcard becomes invalid and you must contact your practice manager or local system administrator.
  - If required, on the Role Selection screen, select the appropriate role.
    - If you only have one role, that role is displayed by default.
  - The Authenticate icon is displayed in the system tray at the bottom of the screen, to show that the software is active and your smartcard is working.
- On the desktop, double-click the EMIS Web icon.
  - The EMIS Web login screen is displayed, with a warning message in red: 'Unable to retrieve smartcard user information'.
- If you have not previously logged on to EMIS Web using your smartcard and the warning message is not displayed, then you cannot synchronise your smartcard, for one of the following reasons:
  - Your smartcard reader is faulty.
  - If you have multiple smartcard readers attached to your computer, you will need to remove the additional readers otherwise a conflict will occur.
In the Username field and the Password field, type your username and password configured.
In the Organisation ID field, type your organisation’s CDB number Click Sign In.
  - EMIS Web launches and the EMIS Web homepage is displayed, with a yellow bar message at the top of the screen.
  - EMIS Web launches and the EMIS Web homepage is displayed, with a yellow bar message at the top of the screen.

- To synchronise your smartcard (i.e. assign your smartcard to your EMIS Web account), click the message text in the yellow bar.

- On the Smartcard Association screen, type your smartcard passcode.

- Click Associate, and then remove the smartcard from the reader.

- Click Close EMIS Web.

**Note:** Although your smartcard is now synchronised with your EMIS Web account, the permissions from the smartcard are not activated until you close EMIS Web and then log on again using the smartcard.
Navigating EMIS Web and the Homepage

Home Page

The homepage is the first page displayed when you access EMIS Web, the homepage is split in different sections, you have a Quick Launch Menu, Organisation Notepad and Latest updates from Emis Now. Some of these sections are configurable for each user.

Configuring your homepage

You can configure the homepage with your own personal preferences.

- At the top right-hand corner of the homepage, click Configure Homepage.
- On the Configure Homepage screen, to display appointments for a selected user/location on your homepage, do the following:
  - In the Appointments section, select Show Appointments on homepage.
  - In the Session Holder field, click and then use the Find Session Holder screen to select the required session holder or location. Highlight the required session holder/location and then click OK.

  Note: If your organisation has set up its appointment sessions by location rather than session holder, click the Location tab to select a location.

- To display shortcuts to EMIS Web modules on your homepage, do the following:
  - In the Quick Launch Menu section, click Configure.
  - On the Customise Quick Launch Menu screen, select the required module(s), and then click Add. Each selected module is moved to the right-hand pane.
  - Click OK. Each selected module is added to the Quick Launch Menu on your homepage.

- To configure the RSS feed font size on your homepage, click and select Small, Medium or Large.
  - If required, add your own RSS feed.
  - Click OK.

The changes to your homepage are saved. Appointments for the selected user or location are displayed on the homepage.

Homepage links

The following links are available from the homepage: Top right-hand side

- Support Centre: use to access the EMIS Support Centre. From the Support Centre you can view training resources and news, join community forum discussions and/or ask questions.
- My Incidents: use to access the EMIS Health ECR Tracker. From the Tracker you can create new support incidents and also track any outstanding support incidents. You can also sign up for major incident alert emails.
- EMIS Health: use to access the EMIS Health website.
Quick Launch Menu Pane
You can use the Quick Launch Menu pane on the left-hand side of the homepage to add shortcuts to the areas of EMIS Web that you use most frequently. These shortcuts enable you to access the required area of the system in one click.

- At the top right-hand corner of the Quick Launch Menu pane, click 🖇.  
  - In the left-hand pane of the Customise Quick Launch Menu screen, select the required module(s), and then click Add. Each selected module is moved to the right-hand pane.

**NOTE:** You can select multiple non-consecutive modules by holding down **CTRL** whilst selecting the required modules. You can also select consecutive modules by selecting the first module, holding down **SHIFT**, and then clicking the last module.

- Click OK. Each selected module is added to the Quick Launch Menu on your homepage.

Organisation Notepad pane
You can use the Organisation Notepad pane on the homepage to quickly send a message to all users in your organisation; for example, to give details of a forthcoming meeting.

**Warning:** Messages can be seen by all users. If you share your organisation with other services, all services can see your messages, so when you send a message you should indicate whether it refers to a specific service or the whole organisation.

- At the top right-hand corner of the Organisation Notepad pane, click 🖇.
  - On the Notepad screen, type your message, and then click OK. The message is displayed in the Organisation Notepad pane for all users.

**NOTE:** You can delete any of your own messages by selecting the message and then clicking 🗑.

EMIS Support Latest News Pane
Use the EMIS Support Latest News pane to view the latest news from EMIS Health. To view a full news article, click its title link.

**Note:** When you access this screen for the first time, you are prompted to supply your email address.

RSS Feed pane
You can use the RSS Feed pane to add and view your favourite RSS feed directly from EMIS Web. RSS feeds enable you to see when websites have added new content, without having to directly view the websites you have taken the feed from. Websites that have an RSS feed will display the RSS feed icon 📰.

- To add a website to the list:
  - Access the website that you want to add an RSS feed to.
  - Locate and click the RSS feed icon 📰. The RSS feed page for the website is displayed, showing the RSS feed name and the link for subscribing to the RSS feed.
  - Click **Subscribe to this feed**.
  - On the Subscribe to this feed screen, click **Subscribe**.
    - The RSS feed is added to the Feeds tab, accessed from your Internet Explorer favourites option.
  - Right-click the feed and select **Properties**.
  - In the Address field on the Feed Properties screen, right-click the whole address URL and select **Copy**.
  - Access the EMIS Web homepage.
  - At the top right-hand corner of the RSS Feed pane, click 🖇.
    - In the RSS Feed URL field on the Configure RSS Feed screen, right-click and select **Paste**.
    - If you want to set the RSS feed for all EMIS Web users at your organisation, select **Set as default RSS feed for organisation**.
    - Click **OK**.
    - The RSS feed is added to the EMIS Web homepage.
Access modules using the EMIS button

You can use the EMIS button from any part of EMIS Web to quickly access any module. The EMIS button is located in the top left-hand corner of the screen. When you click the EMIS button, a menu is displayed, which you can use to select and access any of the modules. You can also use the EMIS button menu to select any of the 10 patients selected most recently; these patients are displayed in the right-hand pane of the menu.

Access modules using the quick access toolbar

The quick access toolbar is located across the top of the EMIS Web screen, beside the EMIS button. You can add shortcuts to the areas of EMIS Web that you use most frequently to the quick access toolbar. You can then use these shortcuts to access the required area of the system with one click. The quick access toolbar has four default options, which you can't remove:

**Default option** | **Use to**
--- | ---
Back | Move back to the previously displayed screen.
Home | Access the EMIS Web homepage.
Screen Messaging | Access the Send Screen Message screen.
Patient Find | Access the Patient Find screen.

Configure the quick access toolbar

- Beside the quick access toolbar, Click and select **Customise Quick Access Toolbar**.

The Customise Quick Access Toolbar screen is displayed.

- In the left-hand pane, select the required module(s), and then click **Add**. The selected module is moved to the right-hand pane.
  - You can select multiple non-consecutive modules by holding down **CTRL** whilst selecting the required modules. You can also select consecutive modules by selecting the first module, holding down **SHIFT**, and then clicking the last module.
- Click OK.
  The icon for each module that you selected is displayed on the quick access toolbar.

**Function Keys**

Function keys, or F keys, are located along the top of your keyboard and provide easy access to different parts of the EMIS Web system. The Appendix at the end of the document has a strip listing the function keys and their uses.

<table>
<thead>
<tr>
<th>Keystroke</th>
<th>Function</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td></td>
<td>Formerly used to access EMIS Web Help, which is no longer available. All EMIS Web support materials are now available in the EMIS Web support centre, which you can access by clicking the Support Centre link at the top right-hand side of the EMIS Web homepage.</td>
</tr>
<tr>
<td>F2</td>
<td>Workflow Manager</td>
<td>Access Workflow Manager. From Workflow Manager you can access the following modules: Tasks, Lab Reports, Registration, Medicine Management, GP2GP, Document Management, Referral Management, Test Requests, Report Management.</td>
</tr>
<tr>
<td>F3</td>
<td>Summary</td>
<td>Access the Summary screen within Care Record.</td>
</tr>
<tr>
<td>F4</td>
<td>Context Find</td>
<td>Find data.</td>
</tr>
<tr>
<td>F5</td>
<td>Find Patient</td>
<td>Select and change the current patient.</td>
</tr>
<tr>
<td>F6</td>
<td>Consultation History</td>
<td>Access to Consultations within Care Record.</td>
</tr>
<tr>
<td>F7</td>
<td>Investigations</td>
<td>Access the Investigations View Reports screen within Care Record.</td>
</tr>
<tr>
<td>F8</td>
<td>File</td>
<td>Save/file data added to EMIS Web.</td>
</tr>
<tr>
<td>F9</td>
<td>Medication</td>
<td>Access the Medication screen within Care Record.</td>
</tr>
<tr>
<td>F10</td>
<td>Appointments</td>
<td>Access to Appointment Quick View for the logged in session holder. From here you can access the Appointment Book or send in a patient as well as switch on privacy. NOTE: Only available to users who are setup as a session holder.</td>
</tr>
<tr>
<td>F11</td>
<td>Investigations</td>
<td>Access the Investigations Values View screen within Care Record.</td>
</tr>
</tbody>
</table>

**Panic Button**

A panic button is displayed in the top right-hand corner of every EMIS Web screen. In an emergency, you can use the panic button to send an alert to all other PCs that are currently logged on to EMIS Web.

- Panic Alerts should be used for any scenario relating to personal safety.

**Send a panic alert**

- From any screen in EMIS Web, double-click the panic button 👍.
  - The icon is then displayed in blue 👍 and an alert is sent to each user who is currently logged in. When a user has responded to the alert, the panic button is displayed in red again 😈.

**Respond to a panic alert**

- When a panic alert has been sent by another user, an alert will pop up on your screen.
If you intend to respond to the alert, click **Respond**. The panic button on the sender’s screen is displayed in red again and a further message is sent to the other PCs, to inform them that you have responded.

- If another user has responded before you, simply click **close**.

**Patient Find and the Patient Precis Bar**

**Finding a Patient**

When you search for and select a patient using Patient Find, the patient becomes the active patient, and their details are displayed in the patient précis at the top of the EMIS Web screen. You can use the patient précis to view information about the patient and to access other functions.

- Use Patient Find (F5) or click 📡 on the Quick Access Toolbar to search for patients in EMIS Web.

![Patient Find](image)

**Search for patients using various methods:**

- Search by patient information.
  - Name
  - EMIS number
Date of birth
NHS number

Search by address and contact details.
House name/number
Street
Postcode
Telephone number

Include patients outside your organisation.
Combine any of the above criteria to narrow down the search (for example, if searching for a patient with a common name).

NOTE: The following conditions apply to the search results displayed when you search for patients:
- If you search by full name for patients whose names are a subset of other parts of their name (for example, Richard Richardson), these patients are displayed at the top of the list of search results.
- The closest match (i.e. the item with the highest number of matching elements) is displayed at the top of the list of search results, followed by the rest of the results.

You can search for patients using a partial match. For example, to find John John, type Jo Jo. The parts of the name that match the search criteria are highlighted in the search results.

If you type 5 Chorley Road as search text and your records contain entries for both 5 Chorley Road and 5 New Chorley Road, these addresses are displayed in the search results in the following order:
- 5 Chorley Road
- 5 New Chorley Road

The Patient Find screen consists of the following sections:
- The search criteria fields are displayed in the top section of the screen.
- Patient details are displayed in the lower section of the screen.

When you first access Patient Find, details of the patients who have been selected most recently are displayed in the lower section of the screen, until you search for another patient.

Patient details in Patient Find are colour coded:
- Active patients are displayed in black type.
- Inactive patients are displayed in blue type.
- Deceased patients are displayed in red type.

When you search for patients using the usual Patient Find function, archived patients are not included. If you want to search for archived patients, access Patient Archive, and then use the Search option to access a version of Patient Find that searches for archived patients only.

Depending on your role profile, you may not be able to access patient records that are flagged as sensitive by PDS or covered by EMIS confidentiality policies.

**Precis Bar**

When you select a patient, the patient précis is displayed immediately below the ribbon on every EMIS Web screen that you use. The patient précis displays the following information about the selected patient:

- Patient status (active or inactive).
- Name (including the patient's calling name).
- Date of birth.
- Gender.
- NHS number (or EMIS number).

You can switch between displaying the patient's NHS number or EMIS number by right-clicking the patient précis, and then selecting View NHS No. or View EMIS No. as required.

For Clinical Services organisations NHS number options are replaced by H&C number options.
• Usual GP.
• PDS status: blue icon for synchronised patients, red icon for non-synchronised patients.
• Confidentiality icon, if appropriate.
• Child Health Information System (CHIS) warning icons, if appropriate; for example, for child protection issues.

You can copy the patient details displayed on the patient précis and save them to your PCs clipboard. When copied to the clipboard you can then paste them to other software outside of EMIS Web. The colour of the patient précis bar indicates the status of the selected patient:
• Regular patient: blue.
• Temporary patient: brown.
• Deceased patient: red.
• Inactive patient: grey.
• Deceased temporary patient: red.
• Inactive temporary patient: grey.

Expand and collapse the patient précis
You can double-click anywhere in the patient précis, or click at the left-hand side of the patient précis, to expand it and view further information about the selected patient:

• Address (including hyperlinks to Google Maps and other patients in the same household).
• Contact information (telephone number(s)).
• Practice information (patient type, patient number). For organisations of any type other than General Medical Practice, the heading of this section is 'Patient Information' rather than 'Practice Information'.
• Patient warnings (including a Manage hyperlink that enables you to access the Manage Patient Warnings screen), for example, to inform clinicians that a patient is hard of hearing or needs a particular test. CHIS warning icons and descriptions are also displayed in this section, if appropriate.
• Patient allergies: If an allergy is recorded more than once in a patient's record, it is only displayed once in the patient précis, with a note stating 'See record for more information'.
• Edit patient details (a hyperlink that enables you to access the patient's registration details) for example to quickly update contact information.
• QOF alerts, listing any QOF-related information missing from the patient's record (General Medical Practice organisations only).
• If appropriate, a note stating that the patient has one or more carers or is a carer.
• Summary Care Record (SCR) consent information, if applicable.

To collapse the patient précis (i.e. restore it to its default size), double-click anywhere in the patient précis, or click at the left-hand side of the patient précis.

View an address on a map
• Access Patient Find.
  o Click and then click Find Patient
  o The Patient Find screen is displayed.
• Select the required patient.
• Expand the patient précis.
• In the Address section, click Map.
  The patient's address is displayed in Google Maps. The patient's address must have a Post Code.
  o If you don't have a browser installed, a warning message is displayed.
View other patients in the same household

- Access Patient Find.
  - Click and then click **Find Patient**
  - The Patient Find screen is displayed.
- Select the required patient.
- Expand the patient précis.
- In the Address section, click **Household**.
  The Patient Find screen is displayed, listing other patients in the same household/at the same address.

Copy information from the patient précis to the clipboard

- Access Patient Find.
  - Click and then click **Find Patient**
  - The Patient Find screen is displayed.
- Select the required patient.
- Expand the patient précis.
- To copy a single patient précis item, right-click the item and select **Copy [item name]** (e.g. Copy NHS Number).
- To copy more than one patient précis item:
  - Right-click and select **Copy Details**.
  - On the Copy Patient Details screen, use the following options to select the required items and configure the copy order:
    - Select the box beside each item you want to copy, or select **All** to copy all patient précis details.
    - Use the arrows to change the order of the selected items.
    - To copy all the selected items, click **Copy to Clipboard**.
- To close the Copy Patient Details screen, click **Close**.

Managing patient warnings

You can use the patient précis to add, edit and remove patient warnings, and to specify when they are to be displayed (i.e. what user actions will trigger the warnings).

Warnings are displayed when a user first performs one of the selected trigger actions; each warning is displayed once only, no matter how many trigger actions you configure.

If more than one different patient warning is triggered for a patient, all the warnings are displayed on one screen as the topmost item on the screen. You cannot access any underlying item, take any further action or select a different patient until you check the warnings and close the warning message screen.

You can also manage patient warnings in Registration.

Add a patient warning

- Access Patient Find.
  - Click and then click **Find Patient**
  - The Patient Find screen is displayed.
- Select the required patient.
  - Expand the patient précis.
  - In the Warnings section, click **Manage**.
    The Manage Patient Warnings screen is displayed, listing any existing warnings for the selected patient.
  - At the top of the screen, click **Add**.
    - In the Warning Message field on the Add Patient Warning screen, type the text of the warning.
In the Trigger Points section, select the action(s) that you want to trigger the warning.

- The warning is always displayed in the expanded patient précis by default.
- If required, in the Sharing field, select **Allow this warning to be viewed by other organisations**.

  - Click **OK**.
    - On the Manage Patient Warnings screen, click **Close**.
    - The warning is displayed whenever a user first performs one of the selected trigger actions.

Each warning is displayed once only, no matter how many trigger actions are configured. For example, if you select Swap Patient and Add Drug as triggers, the warning is displayed when you swap to a patient, but is not displayed again if you then go on to add a drug for that patient.

**Edit a patient warning**

You can’t edit allergies and QOF alerts, because they are generated in other areas of EMIS Web.

- Access Patient Find.
  - Click **Find** and then click **Find Patient**
  - The Patient Find screen is displayed.
- Select the required patient.
- Expand the patient précis.
- In the Warnings section, click **Manage**.
  - The Manage Patient Warnings screen is displayed, listing any existing warnings for the selected patient.
- In the list of warnings, click the warning that you want to edit.
- At the top of the screen, click **Edit**.
  - On the Edit Patient Warning screen:
    - If required, in the Warning Message field, edit the text of the warning.
    - If required, in the Trigger Points section, edit the required trigger points.
    - If required, in the Sharing field, select **Allow this warning to be viewed by other organisations**.
    - Click **OK**.
- On the Manage Patient Warnings screen, click **Close**.
  - The warning settings are updated.

**Remove a patient warning**

- Access Patient Find.
  - Click **Find** and then click **Find Patient**. The Patient Find screen is displayed.
- Select the required patient.
- Expand the patient précis.
- In the Warnings section, click **Manage**.
  - The Manage Patient Warnings screen is displayed, listing any existing warnings for the selected patient.
- In the list of warnings, click the warning that you want to remove.
- At the top of the screen, click **Delete**.
  - On the confirmation message screen, click **Yes**.
- On the Manage Patient Warnings screen, click **Close**.
  - The warning is removed.

**Clearing Patient Details from The patient précis**

*When sharing your screen for remote support purposes it is best practice to either have a Dummy patient selected or if the problem is not relating to a specific patient, you can ‘clear current patient’ selected from the Patient précis so that there are no patient details present on-screen when the support representative connects to your machine.*
To clear the currently selected patient

To clear the current patient, do one of the following:

- Right-click the patient précis and select 'Clear Current Patient'. OR
- Click EMIS button, point to Session, and then click Clear Patient.

Accessing External links and Session Menu

Mentor Online

Mentor Online is the web-based version of the Mentor library: the electronic medical knowledge base designed and developed by EMIS and Oxford University Press for use wherever doctors and other healthcare professionals encounter patients.

Details of more than 2,000 diseases are stored within Mentor Online and the information is cross-referenced with more than 25,000 commonly used medical terms.

Mentor Online also includes PIL. Many of the text articles also include direct links to relevant websites and email addresses and, where available, links to MEDLINE references.

To access Mentor Online:

- Click , point to External Links, and select Mentor Online or you can access from Care Record.
- Logins and passwords
  - You can use a generic login username emisweb and password emisweb, but if you do so, no Mentor activity will be filed in your Personal Development Plan (PDP).
  - If you need an individual login for Mentor, click the Contact us link and send us an email (ps_webmaster@emishealth.com) with your CDB number (EMIS site number).
  - If there are several users at your site who need logins, ask the practice manager or IT manager to email this address requesting details for the whole practice.
  - If you have transferred from EMIS LV or EMIS PCS, you can either use the generic username or request an individual log in.

Patient UK

Patient UK is the definitive source of information for patients that is used by patients and healthcare professionals alike.

Information is reliable, impartial, written and reviewed by independent GPs and is free to access; you do not need to register. The website and its content are written in a clear, concise way, making difficult medical topics easy to understand.

The site has almost 700 PILs on medical conditions, health and wellbeing information, more than 800 DILs on medicines and drugs, and details of over 2,000 UK patient support and self-help groups. It includes an extensive directory of UK websites on health, disease and related topics, as well as recommended books on health and disease and a number of health related services. The information on the site is extensively cross-referenced and there are links as appropriate to national charities and patient organisations.

To access Patient UK:

- Click , point to External Links, and select Patient UK.

NHS e-Referrals

This will take you to the NHS e-Referrals service homepage, but this will only work if you are logged in with a NHS Smartcard. Specific training on NHS e-Referrals is available if your role requires this training.
### Changing your location

- Click 🔄 point to Session, and then select Change Location.  
  - From the options in the right-hand pane of the Choose a Location screen, select the required location.
    - Do one of the following: 
      - To select the location, click OK. 
      - To set the selected location as your default location, click Set as Default, and then click OK. A green tick ✓ is displayed beside the location, to show that it is set as the default location. 
      - To close the screen without making a selection, click Cancel.

### Changing your password

- Click 🔄 point to Session, and then select Change Password. 
  - In the Current Password field on the Change Password screen, type your current password.
  - In the New Password field, type your new password.
  - The password must contain at least one capital letter and one number, and must be between 8 and 20 characters long.
  - In the Confirm New Password field, re-type your new password.
  - Click OK.

- Your password is changed.

It is important to change your password regularly, and EMIS Web forces you to do so every three months. This helps to maintain your password integrity and reduces the chance of a security breach.

### EMIS Web Time out (some of this has changed due to an update with Identity Agent)

EMIS Web automatically times out after 30 minutes. When EMIS Web has timed out, you need to do one of the following:

- If you are using a smartcard:
  - To access EMIS Web, type your PIN on the Gem Authenticate screen, and then select Yes I accept and wish to proceed for the purpose of patient care.
  - To exit EMIS Web, click No I do not accept and wish to exit.
- If you are not using a smartcard:
  - To access EMIS Web, type your password in the Password field, and then click Unlock.
  - To exit EMIS Web, click Close EMIS Web.

### Patient Care Record overview

#### Summary

The Summary screen displays a brief summary of a patient's care record, enabling you to view key information quickly from one screen. The summary information is gathered from other areas of the care record.

You can also access a number of pre-configured clinical views from the Summary screen, which help you to quickly display information relating to a particular discipline. As well as using the pre-configured clinical views, you can also create your own clinical views, which will be available across the whole of your organisation.

**To access the Summary screen:**

- Click 🔄 point to Care Record and then select Summary.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.
The Summary screen consists of a number of panels Record Sharing, Problems, Medication, Allergies, Diary, Recent Activity and Health Status.

You can maximise any of the Summary screen panels by clicking ▼ beside the module name. If you want to minimise the panel again, click □.

When you access Care Record Summary, a ribbon is displayed.

Guide to ribbon options.

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
</table>
| Add/Edit | Add | Add any of the following to patients' care records:  
- Code  
- Allergy  
- Consultation  
- Referral  
- Document  
- Data using template  
- Diary entry  
- Test request  
- Growth data  
- Fit note |
| | Sharing | Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care record to be shared with other organisations. You can also use this option to configure SCR patient consent. |
| View | Export | Export patient details in .xml format to be imported into another system. |
| View | Summary, Cardiac View, Child Health, Diabetic (default clinical views) | View different types of patient data in one of the pre-configured clinical views, or configure your own clinical views in Care Record Configuration. |
| Print | Print | Print any of the following:  
- Brief summary  
- Full summary  
- Full export with attachments  
- Brief summary with attachments  
- Full summary with attachments  
- User defined summary |
| Config | CR Config | Configure clinical views that will be available across the organisation. You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/autocorrect settings. |
| Knowledge | Browse | Browse Mentor Online. |

**Consultations Screen**

- Click ▶ point to Care Record and then select Consultations.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

The Consultations screen consists of three sections:

- **Date Navigator (left-hand) pane:** Use this pane to select the consultation you want to view.
• **Problems (left-hand) pane:** Expand the pane using the arrows to view problems that have been added to the patient's care record as a consultation.

Expandable Problems pane in the Consultations screen

• **Main (right-hand) pane:** This pane displays all consultations that have been added to the patient's care record, including the following information:
  - Presenting problem
  - History
  - Examination
  - Comments
  - Additional details
  - Consultation date
  - Clinician
  - Referral
  - Medication
  - Result

Laboratory report results, abnormality indicators and comments are also displayed on the Consultations screen.

When you access Consultations, a ribbon is displayed at the top of the screen.

Guide to ribbon options

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
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</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Add</td>
<td>Add any of the following to patients’ care records:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Consultation</td>
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<td>- Quick note</td>
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<td>- Code</td>
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<td>- Allergy</td>
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<td>- Referral</td>
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<td>- Document</td>
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<td></td>
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<td>- Data using template</td>
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<td>- Diary entry</td>
</tr>
<tr>
<td></td>
<td>Edit Consultation</td>
<td>Edit the selected consultation.</td>
</tr>
<tr>
<td></td>
<td>Delete Consultation</td>
<td>Delete the selected consultation.</td>
</tr>
<tr>
<td></td>
<td>Sharing</td>
<td>Specify whether the patient gives permission for their EMIS Web care record to be viewed and shared with other organisations.</td>
</tr>
<tr>
<td>View</td>
<td>Trend</td>
<td>Select Tabular Trend, to view the data in tabular form, or select Graphical Trend, to view the data in graphical form. For more information, take a look at how to view a trend on a graph or table.</td>
</tr>
<tr>
<td></td>
<td>My Consultations</td>
<td>View your own consultations only.</td>
</tr>
<tr>
<td></td>
<td>Show time</td>
<td>Show the time of consultations next to the date on the Consultations screen.</td>
</tr>
<tr>
<td>Filter</td>
<td>Filters</td>
<td>Apply a filter to the Consultations screen.</td>
</tr>
<tr>
<td></td>
<td>Search View</td>
<td>Search for a specific consultation within the list.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>To remove the filter, click ❌.</td>
</tr>
<tr>
<td>Print</td>
<td>Print</td>
<td>Print any of the following:</td>
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<td></td>
<td>- Selected items</td>
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<td></td>
<td></td>
<td>- Brief summary</td>
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<td>- Full summary</td>
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<tr>
<td></td>
<td></td>
<td>- Brief summary with attachments</td>
</tr>
<tr>
<td>Config</td>
<td>CR Config</td>
<td>Configure organisation consultation and user consultation details, including consultation styles, types, quick picks, history, synonyms and dictionary/autocorrect settings. You can also configure clinical views for the Summary screen.</td>
</tr>
<tr>
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</tr>
<tr>
<td>Knowledge</td>
<td>Mentor</td>
<td>View relevant information in Mentor Online. This option is only available if you have selected an item on the screen. For example, if you select an Asthma problem in Consultations and then click Mentor, asthma information is displayed in Mentor Online.</td>
</tr>
<tr>
<td>Browse</td>
<td></td>
<td>Browse from the Mentor Online homepage using the Mentor search facility.</td>
</tr>
</tbody>
</table>

### Medication Screen

- Click ![Care Record](image) point to **Care Record** and then select **Medication**.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

The Medication screen consists of two sections:

- **Collapsible (left-hand) pane:** This pane shows any sharing agreements that are in place; click ➔ to expand the pane and ✅ to collapse the pane.
- **Main (right-hand) pane:** This pane displays the patient's prescribing record, including the full issue details of all current and past medication. You can view the information in a number of ways; for example, you can group items by their drug group (EMIS Drug Group) or by the problems they are linked to (Problem Oriented View). At the bottom of the Medication screen, the medication review date, medication message, exemption expiry date and any allergies are displayed.

When you access Medication, a ribbon is displayed.

<table>
<thead>
<tr>
<th>Guide to ribbon options:</th>
<th><strong>Option</strong></th>
<th><strong>Use to</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Medication</td>
<td>Add Drug</td>
<td>Add new medication to the patient’s prescribing record.</td>
</tr>
<tr>
<td></td>
<td>End Course</td>
<td>Move medication to the Past Medication screen.</td>
</tr>
<tr>
<td></td>
<td>Reauthorise</td>
<td>Reauthorise repeat items and add individual drug reviews.</td>
</tr>
<tr>
<td></td>
<td>Match</td>
<td>Match medication that has been streamed into EMIS Web that is not currently matched to an item in the drug database.</td>
</tr>
<tr>
<td></td>
<td>Link</td>
<td>Link medication to problems.</td>
</tr>
<tr>
<td></td>
<td>Rx Type</td>
<td>Change the prescription type.</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
<td>Change medication issue details.</td>
</tr>
<tr>
<td></td>
<td>One-off issue</td>
<td>Create a one-off acute issue from a repeat medication.</td>
</tr>
<tr>
<td></td>
<td>G/T Switch</td>
<td>Switch medication to its generic or trade equivalent.</td>
</tr>
<tr>
<td>Issuing</td>
<td>Issue</td>
<td>Issue medication.</td>
</tr>
<tr>
<td></td>
<td>Cancel Issue</td>
<td>Cancel the last issue of medication.</td>
</tr>
<tr>
<td><strong>Reprint</strong></td>
<td>Reprint a copy of original prescriptions.</td>
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<td>------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Request Issue</strong></td>
<td>Request repeat or electronic prescriptions (EPS), to be signed by authorised prescribing users.</td>
<td></td>
</tr>
<tr>
<td><strong>Current/Past</strong></td>
<td>View current, past or all medication.</td>
<td></td>
</tr>
</tbody>
</table>
| **Grouping** | Group medication by one of the following options:  
- Acute/Repeat  
- EMIS Drug Groups  
- Problem Orientated  
- Acute/Repeat (Alphabetical)  
- No Grouping |
| **View Style** | Switch between the summary and detailed view. |
| **Drug History** | View a detailed issue history of medication. |
| **Regime Review** | Set a date and a clinical term (optional) for general medication reviews for patients (not for individual medication). |
| **Screen Message** | Add messages to patients’ prescribing records, for all users to view. |
| **Nominations** | Nominate patients’ preferred dispensing contractors when producing electronic prescriptions (EPS Release 2). |
| **Patient Actions** | Carry out the following patient actions:  
- Send medication review reminders (printed on patients’ next repeat prescriptions).  
- Set exemption expiry dates.  
- Assign patients to automatic issue groups.  
- Set collection dates for automatic prescriptions.  
- Print the right-hand side of prescriptions for controlled drugs for individual patients. You can configure printing of the right-hand side for controlled drugs for the whole organisation on the Medication Configuration screen (Organisation Options, Right Hand Side).  
- Specify prescription destinations.  
- View EPS prescriptions: type an EPS identifier to view a prescription in read-only view. The EPS identifier is located next to the barcode on printed EPS prescriptions, or you can select the View option in Drug History.  
- Add, edit or remove a preferred pharmacy.  
- Configure data sharing options.  
Some of these options are also available at the bottom of the main Medication screen. |
| **Config** | Configure the Medication module. |
| **Print** | Print patient-related documents. You can select the level of information included: drug information only, brief summary or full summary. |
| **Drug Info** | Browse the electronic British National Formulary (BNF). Drug information is also available from the Add/Edit a Drug screen. |

The options available on the ribbon may vary, depending on your role and the action you are taking.

**Problems screen**

- Click ![ Care Record icon ] and then select Problems.

**NOTE**: If you do not have a patient selected, you are prompted to choose one.

Problems are usually added to a patient’s care record during a consultation, using the New Consultation screen. Use the Problems screen to link problems to related information such as documents, referrals and medication. You can also manage related problems, by grouping, combining and evolving them.
Guide to ribbon options:

<table>
<thead>
<tr>
<th>Section</th>
<th>Options</th>
<th>Use to</th>
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</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Add</td>
<td>Add any of the following to patients’ care records:</td>
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<td>• Code</td>
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<td></td>
<td></td>
<td>• Allergy</td>
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<td></td>
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<td>• Consultation</td>
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<tr>
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<td></td>
<td>• Referral</td>
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<tr>
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<td>• Document</td>
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<td>• Data using Template</td>
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<td>• Diary Entry</td>
</tr>
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<td></td>
<td></td>
<td>• Test Request</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
<td>Edit problems.</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
<td>Replace problems or remove them from Care Record with no replacement.</td>
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<tr>
<td></td>
<td>Sharing</td>
<td>Specify whether the patient gives permission for their EMIS Web shared</td>
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<td>record to be viewed and for their care record to be shared with other</td>
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<td></td>
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<td>organisations.</td>
</tr>
<tr>
<td>View</td>
<td>Expand Groups</td>
<td>Expand and view grouped problems.</td>
</tr>
<tr>
<td></td>
<td>Deleted Items</td>
<td>View recently deleted or replaced problems.</td>
</tr>
<tr>
<td>Actions</td>
<td>Change Status</td>
<td>Change the status of problems.</td>
</tr>
<tr>
<td></td>
<td>Group Problems</td>
<td>Group and ungroup problems.</td>
</tr>
<tr>
<td></td>
<td>Combine Problems</td>
<td>Combine and un-combine problems.</td>
</tr>
<tr>
<td></td>
<td>Evolve Problems</td>
<td>Evolve and undo the evolution of problems.</td>
</tr>
<tr>
<td></td>
<td>Medication Linker</td>
<td>Link medication to problems.</td>
</tr>
<tr>
<td>Filter</td>
<td>Filters</td>
<td>Apply a filter to the Problems screen.</td>
</tr>
<tr>
<td></td>
<td>Search View</td>
<td>Search the Problems screen for text or codes. As you start typing, only the entries with the text or code in them are displayed.</td>
</tr>
<tr>
<td>Print</td>
<td>Print</td>
<td>Print any of the following:</td>
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<td>Config</td>
<td>CR Config</td>
<td>Configure clinical views that will be available across the organisation.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/autocorrect settings.</td>
</tr>
<tr>
<td>Knowledge</td>
<td>Mentor</td>
<td>View relevant information in Mentor Online.</td>
</tr>
</tbody>
</table>

**Investigations Screen**

- Click point to **Care Record** and then select **Investigations**.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

Use the Investigations screen to display all the values and results in patients’ care records. You can view, filter and/or print the recorded values and results.
Two views are available on the Investigations screen:

- Values View: displays a list of all the latest values in a patient’s care record.
- View Reports: displays a list of all the latest lab results in a patient’s care record.

Use the Range Indicator column as a quick graphical representation of results: any red bars and exclamation marks indicate the value is outside the normal range.

Example Investigations screen with red bars and exclamation marks circled

By default, only the latest instance of an investigation is displayed. To view all investigations, deselect Latest Only on the ribbon.

When you access Investigations, a ribbon is displayed.

Guide to ribbon options:

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
</table>
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- Code  
- Allergy  
- Consultation  
- Referral  
- Document  
- Data using template  
- Diary entry  
- Test request  
- Fit note |
| | Edit | Edit values. |
| | Delete | Delete values. |
| | Sharing | Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care record to be shared with other organisations. Lab reports can only be viewed at the registered organisation. |
| View | Latest Only | View the latest entry only. |
| | Abnormal Only | View investigations that are out of range or marked as abnormal. |
| | Descriptive Text | View or hide descriptive text in investigations. |
| | Collapse All | View investigation headers, but not individual values. |
| | Values View | View all values in a patient’s care record. |
| | View Reports | View a list of all the latest lab results in a patient’s care record. |
| Filter | Filters | Apply a filter to the Investigations screen. |
| | Search View | Search the Investigations screen for text or codes. |
As you start typing, only the entries with the text or code in them are displayed.

| Print | Print | Print any of the following:  
|       |       | - Selected items  
|       |       | - Brief summary  
|       |       | - Full summary  
|       |       | - Brief summary with attachments  
|       |       | - Full summary with attachments  
|       |       | - User defined summary |

| Config | CR Config | Configure clinical views that will be available across the organisation. You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/autocorrect settings. |

| Knowledge | Mentor | View relevant information in Mentor Online. This option is only available if you have selected an item on the screen. For example, if you select an Asthma problem and then click Mentor, asthma information is displayed in Mentor Online. |
|          |       | Browse from the Mentor Online homepage using the Mentor search facility. |

| Test Requests | Patient Report List | View a list of test requests completed for the selected patient through an online test request provider. |

### Care History Screen

- Click [Point to Care Record and then select Care History.](#)

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

Use Care History to view, filter and print all care events that have been added to patients' care records. A care event includes any entry made to a patient's care record from anywhere in Care Record, i.e. not only consultations. The Care History screen displays details of the care event, the date it was added to the system, associated values or text and the context of the event. On the Care History ribbon, you can select pre-defined Care History views, so that only allergies, immunisations or family history data are displayed.

You can view attached documents on the Care History screen, by double-clicking the required document.

In a collapsible pane on the right-hand side of the screen, the following detailed information about the highlighted Care History item is displayed:

- Term.
- Value or free text.
- Read code.
- SNOMED-CT code.
- Graphical display (for values only).
- Tabular display of previous entries.

By default, only the latest instance of an investigation is displayed. To view all investigations, deselect **Latest Only** on the ribbon.

When you access the Care History screen a ribbon is displayed at the top of the screen:

---

**Guide to ribbon options**

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
</table>

---
Add/Edit

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Add</th>
<th>Add any of the following to a patients' care records:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>- Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Allergy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Consultation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Referral</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Data using template</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Diary entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Test request</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Fit note</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Edit</th>
<th>Edit codes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Delete</td>
<td>Delete codes.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Sharing</td>
<td>Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care record to be shared with other organisations.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Trend</th>
<th>- Tabular Trend – view the data in tabular form.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>- Graphical Trend – view the data in graphical form.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Latest Only</td>
<td>View the latest entry on screen only.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Descriptive Text</td>
<td>View descriptive text where available.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Collapse All</td>
<td>View headers, but not individual values.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>All Data</td>
<td>View all coded data.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Non Value Data</td>
<td>View all coded data apart from values and investigations.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Allergies</td>
<td>View all coded allergies.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Health Status</td>
<td>View all entries coded via the Health Status template.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Family History</td>
<td>View all coded family history entries.</td>
</tr>
<tr>
<td>Add/Edit</td>
<td>Immunisations</td>
<td>View all coded immunisations.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Filters</th>
<th>Apply a filter to the Care History screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Search View</td>
<td>Search the Care History screen for text or codes. As you start typing, only the entries with the text or code in them are displayed.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Print</th>
<th>Print any of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>- Selected Items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Brief Summary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Full Summary</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Brief Summary with Attachments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Full Summary with Attachments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- User Defined Summary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Config</th>
<th>Configure clinical views that will be available across the organisation. You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/autocorrect settings.</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Add/Edit</th>
<th>Knowledge</th>
<th>View relevant information in Mentor Online. This option is only available if you have selected an item on the screen. For example, if you select an Asthma problem and then click Mentor, asthma information is displayed in Mentor Online.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Browse</td>
<td>Browse from the Mentor Online homepage using the Mentor search facility.</td>
</tr>
</tbody>
</table>

**Diary Screen**

- Click [point to Care Record](#) and then select Diary.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

Use the Diary screen to action planned items and tasks. Planned items can range from alerts about data missing from a patient's record, to overdue diary entries; tasks can range from medication requests, to eRS requests, to lab
results, and are also displayed in Workflow Manager. Past appointments made in EMIS Web, future appointments
and diary entries are also displayed on the Diary screen, for example, asthma or diabetes review dates.
Past appointments from previous systems are not transferred to EMIS Web and are not displayed.
When you access Diary, a ribbon is displayed at the top of the screen.

Guide to ribbon options:

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Add</td>
<td>Add any of the following to patients' care records:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Code</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Allergy</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Consultation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Referral</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Document</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Data using template</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Diary entry</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Test request</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Fit note.</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
<td>Edit selected tasks or diary entries.</td>
</tr>
<tr>
<td></td>
<td>Complete</td>
<td>Complete the selected diary entry. <strong>Note:</strong> If the selected diary entry is part of a consultation, the diary entry is marked in the consultation as [completed] and any associated text remains.</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
<td>Delete selected tasks or diary entries.</td>
</tr>
<tr>
<td></td>
<td>Sharing</td>
<td>Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care record to be shared with other organisations.</td>
</tr>
<tr>
<td>Actions</td>
<td>Use Auto-Template</td>
<td>Run a template that contains the prompts required to deal with the entries in the Planned Items section (for example, QOF alerts).</td>
</tr>
<tr>
<td>View</td>
<td>Current Items</td>
<td>View current items.</td>
</tr>
<tr>
<td></td>
<td>Past Appointments</td>
<td>View past appointments.</td>
</tr>
<tr>
<td></td>
<td>Completed Tasks</td>
<td>View completed tasks.</td>
</tr>
<tr>
<td></td>
<td>Completed Test Requests</td>
<td>View completed test requests.</td>
</tr>
<tr>
<td>Print</td>
<td>Print</td>
<td>Print any of the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Selected items</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Brief summary</td>
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<td></td>
<td></td>
<td>- Full summary</td>
</tr>
<tr>
<td></td>
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<td>- Brief summary with attachments</td>
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<tr>
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<td></td>
<td>- Full summary with attachments</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- User defined summary</td>
</tr>
<tr>
<td>Filter</td>
<td>Filters</td>
<td>Filter past appointments.</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Tip:</strong> Build a DNA filter to quickly display all appointments a patient has DNA'd. Take a look at the video above this table to find out how.</td>
</tr>
<tr>
<td></td>
<td>Search View</td>
<td>Search on past appointment details.</td>
</tr>
<tr>
<td>Config</td>
<td>CR Config</td>
<td>Configure clinical views that will be available across the organisation. You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/autocorrect settings.</td>
</tr>
</tbody>
</table>
**Documents Screen**

- Click [ems] point to **Care Record** and then select **Documents**.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

You can use the Documents screen to view, print, email and link patient-related documents. From the Document screen you can add all types of documents to a patient's care record; from word processing documents (referral letters, discharge summaries, scanned letters) to graphics and images, and then link them to problems or referrals in the patient's care record.

You can view, print and email any documents added to the patient's care record.

**Note:** Microsoft Word documents open in Microsoft Word, not EMIS Web. Use the printing and emailing facilities in Microsoft Word to print and email these documents.

To access Documents, click [ems] point to **Care Record**, and then select **Documents**. If you don't have a patient selected, you're prompted to choose one.

When you access Documents, a Documents ribbon is displayed

![Documents ribbon](image)

**Guide to ribbon options.**

The options available on the ribbon may vary, depending on your role and the action you're taking.

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
</table>
| Add/Edit | Add | Add any of the following to a patient's care record:  
- Code  
- Allergy  
- Consultation  
- Referral  
- Document  
- Data using template  
- Diary entry  
- Test request  
- Fit note  
**Note:** The Add option is disabled (greyed out) if you do not have one of the following RBAC activities in your role profile:  
- B0143 Verify Clinical Documents  
- B0380 Perform Detailed Health Records |
| Add/Edit | Edit | Edit documents.  
**Note:** Documents such as Excel spreadsheets and PDF documents open in Microsoft Excel and Adobe Reader respectively. |
| Add/Edit | Delete | Delete documents. |
| Add/Edit | Sharing | Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care record to be shared with other organisations. |
| Add/Edit | View | View a list of all attached documents.  
Explore | Preview attached documents. |
**Filter**

<table>
<thead>
<tr>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Filters</td>
<td>Apply a filter to the Documents screen.</td>
</tr>
<tr>
<td>Search View</td>
<td>Search the Documents screen for text or codes. <strong>Note:</strong> As you start typing, only the entries with the text or code in them are displayed.</td>
</tr>
</tbody>
</table>

**Print**

<table>
<thead>
<tr>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>View/Print</td>
<td>View, print or email document(s) or a document list.</td>
</tr>
<tr>
<td>Export</td>
<td>Export documents.</td>
</tr>
</tbody>
</table>

**Config**

<table>
<thead>
<tr>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>CR Config</td>
<td>Configure clinical views that will be available across the organisation. You can also configure consultation styles, types, quick picks, synonyms, history and dictionary/auto-correct settings.</td>
</tr>
</tbody>
</table>

### Referrals screen

- Click 🔗 point to **Care Record** and then select **Referrals**.

**Note:** If you do not have a patient selected, you are prompted to choose one.

Use the Referrals screen to display **all** inbound and outbound referrals (and accompanying referral letters) recorded in a patient's care record. From here, you can add a referral, send a referral task, and then generate a referral letter. You can also set up a default referral letter by selecting the appropriate letter template.

Multiple users can access and amend the same patient's care record simultaneously. If another user amends the care record you are currently viewing, a yellow warning message is displayed across the top of your screen. If a warning message is displayed, to view the most up-to-date record, click **Current Patient's Medical Record has just been Updated by...** or click ✗ to close.

The Referrals screen consists of three sections:

- **Collapsible (left-hand) pane:** This pane displays any sharing agreements for the patient. You can expand the pane by clicking ➔ and collapse it by clicking ◀.

- **Main (left-hand) pane:** This pane displays the following basic information about all referrals for the selected patient:
  - The Date column displays the date of the referral.
  - The Term column displays the clinical term recorded for the referral.
  - The Details column displays information about the person/organisation the patient has been referred to/from.
  - The clinician column displays the name of the clinician who created the referral.
  - The Status column displays the referral's current status.

- **Collapsible (right-hand) pane:** This pane displays a detailed view of the referral selected in the main pane. You can expand the pane by clicking ◀ and collapse it by clicking ➔.

When you access Referrals, a ribbon is displayed at the top of the screen:

**Guide to ribbon options.**

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add/Edit</td>
<td>Add</td>
<td>Add referrals.</td>
</tr>
<tr>
<td></td>
<td>Edit</td>
<td>Edit referrals.</td>
</tr>
<tr>
<td></td>
<td>Delete</td>
<td>Delete referrals.</td>
</tr>
</tbody>
</table>
Sharing  Configure patients’ data sharing preferences.

Mark As  Change the status of referrals.

Recall  Recall managed referrals.

**CAB (Choose and Book is now known as e-Referral Service)**

eRS Portal  Access the e-Referral Service website.

**Filter**

Filters  Filter the Referrals screen.

Search View  Search for referrals.

**Config**

CR Config  Configure consultation styles, types and quick picks.

Knowledge  Search  Access Mentor.

### Appointment overview

**Navigate Appointment book**

Use the Appointment Book to view your appointments for planned sessions.

You can filter your view of the Appointment Book to see key information by using the calendar to quickly navigate to a date (in the future or the past), the many ribbon options, the quick pick filter or your session holder filters.

To access Appointments, Click [Appointments] and then select [Appointment Book].

If you’re logged on as a session holder, all your planned sessions for the day are displayed, adjusted relative to the time of day. If a session has ended and all patients have been marked as left, then the session is minimised, i.e. the morning session is hidden when the afternoon session begins.

Press **F10** from anywhere in EMIS Web to open the Quick View Appointments screen and view your appointments for today.
**Appointment Book screen and ribbon**

The Appointment Book screen consists of the following sections:

- **Navigation pane (left-hand pane):** the calendar is displayed at the top of the pane and a list of available session holder filters at the bottom of the pane.

  The list of session holder filters is only displayed if you have configured which session holder filters to view in Appointments Configuration > Session Holder Filters.

- **Main pane:** when you select a date and filter(s), any appointment sessions for the selected date and session holder(s) are displayed in the right-hand pane.

  If a session holder has no sessions for a particular day, no session details are displayed for that session holder.

When you access Appointment Book a ribbon is displayed at the top of the screen.

Guide to ribbon options:

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Book Appointment</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Find Slot</td>
<td>Find Slot</td>
<td>Find specific appointment slots.</td>
</tr>
<tr>
<td>Book Appt</td>
<td>Book</td>
<td>Book appointments.</td>
</tr>
<tr>
<td>Cancel Appt</td>
<td>Cancel Appt</td>
<td>Cancel booked appointments.</td>
</tr>
<tr>
<td><strong>Actions</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patient Appointments</td>
<td>Find Slot</td>
<td>Find patients’ past, future and cancelled appointments.</td>
</tr>
<tr>
<td>Session Properties</td>
<td>Edit the properties of appointment sessions.</td>
<td></td>
</tr>
<tr>
<td>Slot Properties</td>
<td>Edit the properties of appointment slots.</td>
<td></td>
</tr>
<tr>
<td>Create Session</td>
<td>Create appointment sessions.</td>
<td></td>
</tr>
<tr>
<td><strong>View</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day View</td>
<td>View appointment sessions for a day.</td>
<td></td>
</tr>
<tr>
<td>Week View</td>
<td>View appointment sessions for a week.</td>
<td></td>
</tr>
<tr>
<td>All Day</td>
<td>View all appointment sessions for a day.</td>
<td></td>
</tr>
<tr>
<td>AM Only</td>
<td>View morning appointment sessions only.</td>
<td></td>
</tr>
<tr>
<td>PM Only</td>
<td>View afternoon appointment sessions only.</td>
<td></td>
</tr>
<tr>
<td>Privacy</td>
<td>Remove the patient’s name from the details on screen.</td>
<td></td>
</tr>
<tr>
<td>Realloc List</td>
<td>View the reallocation list (patients removed from cancelled appointment sessions).</td>
<td></td>
</tr>
</tbody>
</table>
To Navigate the Appointment Book

- Click point to **Appointments**, and then select **Appointment Book**.

  The Appointment Book is displayed. When you access the Appointment Book, today’s date is displayed on the calendar in the navigation pane.

- To move to another date, do one of the following:
  - Use the arrow options to move forward or backward.
  - OR
  - On the keyboard, press + or – to display the following screen.

    ![Move by](image)

    - Type the number of days, weeks, months or years you want to move on by.
    - Type the required time abbreviation, i.e. d for days, w for weeks, m for months or y for years.
    - Press ENTER.

- **NOTE:** If you type -3w, and then press ENTER, you will move to 3 weeks before the date you are currently viewing.

- To return to today's date, click **Today**.

**Session Holder filter**

You can use session holder filters to group session holders into practical groups for viewing the Appointment Book, for example, all doctors’ appointments, all nurses’ appointments, all clinic sessions, appointments for session holders working together (for example, a doctor and a nurse running a minor surgery clinic).

If a session holder has no appointments for the selected day, their name is greyed out in the filter. Use the Quick Pick filter at the bottom of the navigation pane, to quickly filter your appointments by either an individual session holder, a list or a location.

- **To Access Appointment Book.**
Book an appointment for the current patient

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

- Access the Appointment Book.
  - Click 𝖤 точки to **Appointments**, and then select **Appointment Book**.
  - The Appointment Book is displayed.
- In the navigation pane, use the calendar to select the required date, and then select the required session. Right-click the required appointment slot and select **Book current patient**.
  - The Book Slot screen is displayed, showing any past, future, or cancelled appointments, and patient warnings in the Additional Information section.
    - On the Book Slot screen, in the Reason field, click 🎨 and select a reason for the appointment. If the selected reason has an associated duration and the available slot is shorter than this time, a warning message is displayed.
    - In the Booking notes field type any additional information.
    - In the Slot Type field, click 📖 and select the required slot type. If you want to print an appointment letter or slip, beside the Letter/Slip field, either click 📖 and select a template from the list, or click 📒.
    - If your organisation is configured for SMS Reminders or email notifications. The Send notification option is automatically selected if the patient has consented to receive notifications. The patient’s mobile number is displayed in the Mobile Number field, these are checked for validity, an invalid entry. If the patient does not want to receive a notification for the appointment, deselect the **Send notification** option.

To preview message details, click **Notification details**.

On the Notification details screen, details of the patient’s mobile number are displayed. To view the message to be sent, select the **SMS** tab.
Details of the message to be sent is displayed in the lower pane.

If a patient has no mobile number recorded, there is an alert icon, displayed beside Notification details.

If you update the patient's mobile number on the Book Slot screen, or add a mobile number if one has not already been added for them, their mobile details are automatically updated in Registration. Mobile numbers must consist of 11 characters, start with 07 and entered with no spaces.

- To complete the booking, click **Book** or **Book and Print**.

Book an appointment for a different patient
- Access the Appointment Book.
Click ✳️, point to **Appointments**, and then select **Appointment Book**.

The Appointment Book is displayed.

- In the navigation pane, use the calendar to select the required date, and then select the required session. Right-click the required appointment slot and select **Book new patient**.

The Book Slot screen is displayed, showing any past, future, or cancelled appointments, and patient warnings in the Additional Information section.

- Complete the Book Slot screen.

  - In the Reason field, click 💼 and select a reason for the appointment.
  - In the Booking notes field type any additional information.
  - If required, in the Slot Type field, click 🔄 and select the required slot type.
  - If you want to print an appointment letter or slip, beside the Letter/Slip field, either click 📄 and select a template from the list, or click 📄.
  - If the patient has consented to receive appointment booked notifications, Send notification is automatically selected.

    - To preview message details, click **Notification details**.
      On the Notification details screen, details of the patient's email address are displayed. To view the message to be sent, select either the **SMS** or **Email** tab.
      Details of the message to be sent is displayed in the lower pane.
    - Click **Close**.

- To complete the booking, click **Book** or **Book and Print**.

**Book an appointment for an unregistered patient**

- Access the Appointment Book.

  - Click ✳️, point to **Appointments**, and then select **Appointment Book**.
  - The Appointment Book is displayed.

- In the navigation pane, use the calendar to select the required date, and then select the required session. Right-click the required appointment slot and select **Book unregistered patient**.

  - On the Book Slot screen, in the Patient Name field, type the patient’s name.
  - In the Reason field, click 💼 and select a reason for the appointment.
  - In the Booking notes field, type any additional information.
  - In the Slot Type field, click and select a slot type. Click **Book**.

You cannot print appointment letters or slips for unregistered patients.

If an appointment was booked for an unregistered patient who is then registered, you can replace the patient’s details without cancelling and re-booking the slot.

**Find and book an appointment**

Use the Find Slot function to book a slot for a patient who requests an appointment on a particular date or at a particular time. You can narrow the search down further to look for specific session holders.

- Access the Appointment Book.

  - Click ✳️, point to **Appointments**, and then select **Appointment Book**.
  - The Appointment Book is displayed.

- On the ribbon, click **Find Slot**.

  - On the Find Appointments screen, complete the fields in the Search Criteria pane.
Use the following table as a guide:

<table>
<thead>
<tr>
<th>Field</th>
<th>How to complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search From</td>
<td>The default is today’s date. Click ☑️ and select the required date.</td>
</tr>
<tr>
<td>Exclude Urgents</td>
<td>Select if required. Select one of the following:</td>
</tr>
<tr>
<td></td>
<td><strong>Any</strong>, to search for appointments at any time of the day.</td>
</tr>
<tr>
<td></td>
<td><strong>AM Only</strong>, to search for appointments in the morning.</td>
</tr>
<tr>
<td></td>
<td><strong>PM Only</strong>, to search for appointments in the afternoon.</td>
</tr>
<tr>
<td>Time of Day</td>
<td><strong>Any Time After</strong>, to search for appointments after a specific time. Type or select the required time.</td>
</tr>
<tr>
<td></td>
<td><strong>Any Time Before</strong>, to search for appointments before a specific time. Type or select the required time.</td>
</tr>
<tr>
<td></td>
<td><strong>Between</strong>, to search for appointments between specific times. Type or select the required times.</td>
</tr>
<tr>
<td>Slot Type</td>
<td>Click ☑️ and select the required slot type.</td>
</tr>
<tr>
<td>Location</td>
<td>The default location is displayed. Change location. Click ☑️ and select the required location</td>
</tr>
<tr>
<td></td>
<td>from the displayed list or click 📚.</td>
</tr>
<tr>
<td>For Specific Session Holders</td>
<td>If you select the Specific Session Holder option the Filter option is disabled, and vice versa.</td>
</tr>
<tr>
<td></td>
<td>A list of appointments matching the selected search criteria is displayed and updates as you add more search criteria.</td>
</tr>
<tr>
<td>Filter</td>
<td>Click ☑️ and select the required filter. The filters displayed are your session holder filters only.</td>
</tr>
<tr>
<td></td>
<td>The default is all languages. If required, select a configured clinician's communication language.</td>
</tr>
<tr>
<td>Languages</td>
<td><strong>NOTE:</strong> Clinician languages are configured in Organisation Configuration &gt; Users &gt; Edit User &gt; Language.</td>
</tr>
<tr>
<td>Service</td>
<td>If services have been configured for your organisation, click ☑️, and select the required service.</td>
</tr>
<tr>
<td></td>
<td>If required, click <strong>Clear Search Criteria</strong> at the bottom of the screen to clear your selections and start again. Once you have selected the appointment Click <strong>Book appointment</strong> button the book slot screen will automatically open for you to complete.</td>
</tr>
</tbody>
</table>

- If further filtering is required, click **Advanced Criteria**.
  - Use the following table as a guide to adding further filters, then click **OK**.

To indicate advanced criteria has been applied, a green banner is displayed beside the Advanced Criteria option.

<table>
<thead>
<tr>
<th>Field</th>
<th>How to complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days to Exclude</td>
<td>Select any day(s) when the patient cannot attend an appointment.</td>
</tr>
</tbody>
</table>
Consecutive Slots
If required, type or select the required number of consecutive slots.

Session Category
Click and select the required appointment session category.
Select one of the following:

- **Any**, if the patient does not have a preference regarding the gender of the HCP.
- **Male**, if the patient would prefer to see a male HCP.
- **Female**, if the patient would prefer to see a female HCP.

- If required, below the Search Results pane, click **Earlier Appointments** or **Later Appointments**.
- Select the required appointment from the list displayed. At the bottom of the screen, click **Book Appointment**.

Now complete the Book Slot screen.

- In the Reason field, click and select a reason for the appointment.
- In the Booking notes field type any additional information.
- If required, in the Slot Type field, click and select the required slot type.
- If you want to print an appointment letter or slip, beside the Letter/Slip field, either click and select a template from the list, or click .
- If the patient has consent to receive appointment booked notifications, Send notification is automatically selected.
  - To preview message details, click **Notification details**.
    On the Notification details screen, details of the patient’s email address are displayed. To view the message to be sent, select either the **SMS** or **Email** tab.
    Details of the message to be sent is displayed in the lower pane.
  - Click **Close**.

To complete the booking, click **Book** or **Book and Print**.
Slot properties
Slot properties will show you general information if its selected when right clicked when there is no appointment booked in. If you do the same when an appointment is booked, it will also tell you the booking information also. (You will only be able to do this if you have the correct RBAC rights on your smartcard)

Mark a patient as arrived/leaving from the Patient Appointments screen
- Access Appointment Book.
  - Click , point to Appointments, and then select Appointment Book.

The Appointment Book screen is displayed.
- On the ribbon, select Patient Appointments.
  - Search for the required patient using Patient Find click OK
  - On the Patient Appointments screen, right-click the patient’s appointment and select Mark as arrived.

Use the following table as a guide to:
- The possible appointment slot statuses.
- The key to press to select each status.
- The icon displayed in the Appointment Book to show each status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Key to press</th>
<th>Icon</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrived</td>
<td>A</td>
<td>A</td>
<td>The patient has arrived for their appointment.</td>
</tr>
<tr>
<td>Send in</td>
<td>S</td>
<td>S</td>
<td>The session holder is ready to see the patient and the patient has been sent in to see the session holder. The send-in time is displayed in the Appointment Book beside the patient's name.</td>
</tr>
<tr>
<td>Quiet send in</td>
<td>Q</td>
<td></td>
<td>Use as an alternative to normal send in for patients who don't want their name to appear on the LED screen.</td>
</tr>
<tr>
<td>Left</td>
<td>L</td>
<td>L</td>
<td>The patient has attended their appointment and left the organisation. When a patient is marked as left, their name is displayed as crossed out in the Appointment Book, as well as the status icon.</td>
</tr>
<tr>
<td>Walked out</td>
<td>W</td>
<td>W</td>
<td>The patient has walked out without attending their appointment.</td>
</tr>
<tr>
<td>Late</td>
<td>-</td>
<td>!</td>
<td>The patient arrived late for their appointment. This alert is shown before the patient is marked as DNA, if configured.</td>
</tr>
<tr>
<td>DNA</td>
<td>D</td>
<td>D</td>
<td>The patient did not attend their appointment. You can configure the DNA status, so that a patient is automatically marked as DNA after a specific period of time and an alert is displayed after a specific number of DNAs.</td>
</tr>
<tr>
<td>Visited and seen</td>
<td>V</td>
<td></td>
<td>The patient was visited at home and seen (home visits only).</td>
</tr>
<tr>
<td>Visited and not seen</td>
<td>N</td>
<td></td>
<td>The patient was visited at home and not seen, and has been marked as DNA (home visits only).</td>
</tr>
<tr>
<td>Start call</td>
<td>S</td>
<td></td>
<td>The patient has been marked as arrived for their telephone consultation (telephone consultations only).</td>
</tr>
<tr>
<td>Telephone consultation completed</td>
<td>T</td>
<td>-</td>
<td>The patient’s telephone consultation has been marked as started and ended (telephone consultations only)</td>
</tr>
<tr>
<td>Telephoned but no answer</td>
<td>H</td>
<td>-</td>
<td>The patient did not answer the telephone and has been marked as DNA (telephone consultations only).</td>
</tr>
</tbody>
</table>
**Cancel an appointment**

- Access Appointment Book.
  
  - Click 📅, point to **Appointments**, and then select **Appointment Book**.
- The Appointment Book is displayed.
- Do one of the following:
  
  - To cancel an appointment from the Appointment Book, select the required appointment slot, and then on the ribbon, click **Cancel Appt**.
  - To cancel a future appointment from the Patient Appointments screen, on the ribbon, click **Patient Appointments** and select the required patient. Then on the Patient Appointments screen, in the Future Appointments section, right-click the required appointment and select **Cancel Appointment**.
    
    ▪ On the Cancel Appointments screen, click 📡 and select the reason for cancelling the appointment.
    
    **NOTE:** You can configure the Appointment Book so that users must add a reason when cancelling appointments using **Appointments Configuration > Organisation Options > Reasons**.
  
  - If required, to change merged appointment slots back to their original state, select **Unmerge Slots**.
  
  - If the patient has opted in for notifications, Send cancellation notification is automatically selected.
    
    ▪ To preview message details, click **Notification details**.
    
    - On the Notification details screen, details of the patient's mobile number are displayed. To view the message to the sent, select the **SMS** tab
    
    - Click **Close**.
  
  - If required, select **Print Cancellation Letter**, and then complete the printing options:
    
    ▪ In the Template field, click 📡 and select the required template or click 📅.
    
    ▪ To preview the letter before printing, click the Preview tab on the Find Document Template screen.
    
    ▪ In the Printer field, your default printer is displayed. To change the printer, click 📡 and select another configured printer.
    
    ▪ To save the cancellation letters to patients’ records, select **Save in Patient Record**. If you select this option, the Description and Document Type fields are then enabled.
    
    ▪ In the Description field, a description of your selected template is displayed, which you can edit, if needed.
    
    ▪ In the Document Type field, the name of your selected document type is displayed. To change the document type, click 📡 and select the required document type or click 📅.
    
    ▪ Click **Cancel Appointment**.
    
    The appointment is cancelled and the cancellation letters are printed, if configured.

**NOTE:** All the activity within a slot, for example, booking, cancelling and re-booking is held within the slot history. This shows what happened, when and which user actioned it. To access this information, right-click the slot and select **Slot History**.
Consultations (Admin)

Consultations are the most common way of adding information to patients’ care records. There are three main types of consultation available in EMIS Web. The type(s) you use must be decided at organisation level, because the decision affects the whole organisation. The three types of consultation are:

- **Header-based**: The consultation type most EMIS users will be familiar with and the one most suited for GP organisations and community practitioners.
- **Quick note consultation**: A free-text only version; you can’t use quick notes to record coded information.
- **Template consultation**: This type is not generally suited to GP organisations.

Emis Web will configure the type(s) of consultation(s) you require, usually when your system is installed. However, you can also add an organisation-specific quick note style if you have the correct RBAC activities in your role profile.

When you select Add from the Consultations screen, a patient name tab is displayed on the menu bar. When this tab is displayed, you can access other areas of EMIS Web while leaving the consultation open, and then click the tab to return to the consultation and file it.

To add a consultation, you must have RBAC activity B0380 in your role profile, and be configured as a consulter in the Role section of the Add User or Edit User screen in Organisation Configuration.

Adding a New Consultation:

- To access the New Consultation screen, click , point to Care Record, and then select Consultations.

  **NOTE**: If you do not have a patient selected, you are prompted to choose one. On the ribbon, click Add and select the required consultation style required.
  - Problem Header, Quick Note Consultation, Template Consultation

Consultation properties

When you add a consultation to a patient’s care record, use the Consultation Properties screen to specify key features of the consultation, for example, the date, the consulter and the location.

You can only select someone as a consulter who has already been configured as a consulter in organisation configuration; they will not show in the picking list unless they’ve been setup as a consulter.

You can also store the settings on the Consultation Properties screen as the default for your session; this means you only have to complete this screen once in a session.

Complete the Consultation Properties screen

- Access the New Consultation screen.
  - Click , point to Care Record, and then select Consultations.
    - If you don’t have a patient selected, you’re prompted to choose one.
      - On the ribbon, click Add and select the required consultation style.
        - If required, type the required date in the Date field.
        - In the Time field, type the required time.
        - If you don’t want to specify a time, highlight the time, and then press DELETE.
  - Do one of the following:
    - Record a consultation at your organisation.
    - Select My Organisation, and then complete the Consulter and Location fields.
    - The Location field is automatically populated with your organisation’s main location.
OR

- Record a consultation external to your organisation.
- Select **External Organisation**, and then complete the Organisation and External Consultant fields.
- In the Consultation Type field, click and select the required consultation type.
- If required, beside Extended Properties, click to add further details:
  - In the Travel field, type the required number of minutes.
  - In the Miles field, type the number of miles travelled.
  - In the Duration field, type the required number of minutes.
  - If another HCP was present during the consultation, in the Accompanying HCP field, click and select the required user.
- If required, select **Store as default for this session**, and then click **OK**.

If you select this option, the same details are automatically added for all consultations in the session. If you are backdating a consultation, you need to either leave the option blank to make sure the date/time is not recorded incorrectly for other consultations, or edit the consultation properties for other consultations and select today's date/time.

*Consultation Properties screen highlighting the Store as default for this session option*

**New Consultation screen and ribbon**
You can click the contact slider at the bottom of the screen to change the level of detail displayed in the bottom pane (displaying the previous ten consultations). To open a document attached to a previous consultation while you have a new consultation open, double-click 📌.

*The New Consultation screen with the contact slider in the bottom pane*

**Different points of entry**
When you click the Add button you can choose different options to add information to the patient’s consultation.
The column on the right-hand side of the New Consultation screen contains two tabs: Summary and Resource. **NOTE:** When you add a new header based consultation or quick note, the New Consultation ribbon is displayed.

---

**Add a quick note**

**NOTE:** If you do not have a patient selected, you are prompted to choose one

You can add quick notes to consultations.
- Access the New Consultation screen.
  - Click "point to Care Record, and then select Consultations."
    - If you don’t have a patient selected, you’re prompted to choose one.
    - On the ribbon, click Add and select Quick Note consultation style.
      - Type the required information.
      - When you have completed the consultation, click Save on the ribbon to save the consultation and add the details to the Consultations screen.

---

**Add data using a template**

**NOTE:** If you do not have a patient selected, you are prompted to choose one

- Access Care Record.
  - Click "point to Care Record, and then select the required Care Record module.
- On the ribbon, click Add and select Data using Template.
  - On the Template Picker screen, to select a template, do one of the following:
- The list of recently selected templates is user specific.
- To search type the name of the required template, click the search button, and then select the template from the search results.
- Navigate the folder hierarchy in the Navigator pane, and then select the template.
- Click the Details tab when a template is selected to view information about the template.
- Click OK.

- Complete the Consultation Properties screen, and then click OK.
- Complete the selected template.
  - If the template has more than one page, select the required page number in the right-hand pane and then complete the screen.
- To view data that has previously been added to the patient's care record using a template, click the double button.
  - This icon is only displayed beside data if a previous entry exists.
  - The Trend screen is displayed, showing a tabular and/or graphical view of any previous entries.
  - If required, click Tabular. Each entry for the selected data is displayed, including the date when the data was added.
- To edit the consultation properties from within the template, click Date/Consulter/Place on the ribbon, and then edit the Consultation Properties screen as required.
  - If you want a user to be able to record consultation data under their own name, make sure they're configured as a consulter.
- Click Save.
- The data is added to the patient's care record.

**NOTE:** Users must not enter clinical data as free text.

**Save a consultation**

When you have completed a consultation with all relevant data save the consultation using the Save Button on the consultation ribbon, this will close the current consultation for the patients.

**Edit a consultation**

**NOTE:** If you do not have a patient selected, you are prompted to choose one
- Access Consultations.
- Click the double button to Care Record, and then select Consultations. If you do not have a patient selected, you are prompted to choose one using Patient Find.
- The Consultations screen is displayed.
  - Do one of the following:
    - In the Date Navigator, select the consultation you want to edit.
    - In the consultation main pane, click any detail of the consultation you want to edit.
  - On the Consultations ribbon, click Edit Consultation.
    - On the Consultation Edit screen, edit the consultation as required, and then click Save on the ribbon.

You can view the audit trail of a consultation that has been edited by double-clicking beside the required consultation to open the Audit Trail Viewer screen.

**Communications within EMIS Web**

**Workflow Manager**

The Workflow manager is the area where all pending work for the practice is stored. There are various areas:- Tasks, Lab Reports, Medicine Management, GP2GP, Document Management, Referral Management, Test Requests and Report Management. You will be limited to seeing various headings, this will depending on whether you are a global viewer or only viewing Task that have been assigned to you.
**Tasks**
The Tasks module within Workflow Manager enables you to:

- Send requests for action to one or more other users.
- Manage the tasks you have sent to other users, and the tasks you have received from other users.

There are many different types of task available in EMIS Web, grouped into two main types:

- Patient tasks: used for actions or information linked to specific patients.
- Admin tasks: used for general administration, and *not* related to specific patients.

If you customise the quick access toolbar and add the Add Task option, you can then use this option to add tasks from anywhere in EMIS Web.

To access Tasks, click the Workflow, select Workflow Manager, and then click Tasks in the navigation pane.

The Tasks screen is displayed, showing your To-Do List by default.

**Tasks screen and ribbon**
The Tasks screen consists of the following main sections:

- Task categories are listed in the navigation (left-hand) pane:

<table>
<thead>
<tr>
<th>Category</th>
<th>Section</th>
<th>Contains</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task Management</td>
<td>To-Do List</td>
<td>Tasks requiring action. The first number in brackets represents the number of tasks on the list, and the second number represents the number of those tasks due today. For example, (3, 1) in brackets indicates that there are three tasks in total, one of which is due today.</td>
</tr>
<tr>
<td></td>
<td>Sent Tasks</td>
<td>Tasks that you have sent.</td>
</tr>
<tr>
<td>Completed Tasks</td>
<td>Completed</td>
<td>Completed tasks.</td>
</tr>
<tr>
<td></td>
<td>Deleted</td>
<td>Deleted tasks.</td>
</tr>
<tr>
<td></td>
<td>Archived</td>
<td>Archived tasks.</td>
</tr>
<tr>
<td>Patient Access Messages</td>
<td>Inbox</td>
<td>Messages sent to your organisation using Patient Access.</td>
</tr>
</tbody>
</table>

- When you select a task category in the navigation pane, tasks in the selected category are listed in the top right-hand pane.
- When you select a task in the top right-hand pane, further information about the selected task is displayed in the bottom right-hand pane.

**Tasks icons and indicators**
To help you identify task types and manage tasks, the following indicators are used on the Tasks screen:

<table>
<thead>
<tr>
<th>Icon or indicator</th>
<th>Indicates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Red</strong> text in the Due Date column</td>
<td>Overdue tasks.</td>
</tr>
<tr>
<td>₹</td>
<td>High priority tasks (displayed at the top of the list).</td>
</tr>
<tr>
<td>✓</td>
<td>Completed sent tasks.</td>
</tr>
<tr>
<td>📈</td>
<td>Tasks generated from pathology/lab reports.</td>
</tr>
<tr>
<td>📩</td>
<td>Tasks that have been replied to.</td>
</tr>
<tr>
<td>📨</td>
<td>Tasks that have been forwarded to another user.</td>
</tr>
<tr>
<td>📝</td>
<td>Tasks with notes attached to them. To read the note, click the icon.</td>
</tr>
<tr>
<td>🤔</td>
<td>Tasks owned by a user other than the currently logged-on user. To view a tooltip showing the task owner's name, hover over the icon.</td>
</tr>
</tbody>
</table>
If you hover over any item count in the navigation pane, e.g. (9, 1), a tooltip is displayed to explain the meaning of the numbers shown.

The first number is the total tasks in the folder, the second is the number of priority tasks in the folder.

When you access Tasks, a ribbon is displayed at the top of the screen.

**Guide to ribbon options:**

<table>
<thead>
<tr>
<th>Section</th>
<th>Option</th>
<th>Use to</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Workflow View</td>
<td>Filter tasks by their owner.</td>
</tr>
<tr>
<td>Admin</td>
<td>Config</td>
<td>Access the Workflow Manager Configuration screen, to configure Tasks settings.</td>
</tr>
<tr>
<td>Actions</td>
<td>Change Owner</td>
<td>Change task owners.</td>
</tr>
<tr>
<td></td>
<td>Add Note</td>
<td>Add notes to tasks. Use notes for non-essential information only, because the information in notes added to tasks is not auditable, and if you reply to or forward a task with a note attached, the note is not sent with the reply.</td>
</tr>
<tr>
<td></td>
<td>Delete Note</td>
<td>Delete notes from tasks.</td>
</tr>
<tr>
<td></td>
<td>View History</td>
<td>View the history of tasks.</td>
</tr>
<tr>
<td></td>
<td>High Priority</td>
<td>Change the priority of tasks. A red arrow 🔄 is displayed beside high priority tasks, and they are displayed at the top of the list.</td>
</tr>
<tr>
<td></td>
<td>Print</td>
<td>Print selected tasks and/or task lists.</td>
</tr>
<tr>
<td>Task</td>
<td>Add Task</td>
<td>Add new tasks.</td>
</tr>
</tbody>
</table>
| Task Filter | Filter  | Apply filters to Tasks, so that only certain tasks are displayed. The filters available are:  
- For the To-Do List: Admin Tasks, Patient Tasks.  
- For Sent Tasks: Incomplete Tasks, Complete Tasks. |
|           | Clear Filter | Remove any filter applied to task lists.                             |
| Task Menu | Open       | Open tasks and view their details on the Workflow Manager Task screen. |
|           | Reply      | Reply to tasks. You can reply to one or more senders. An icon 💌 is displayed beside tasks that have been replied to. |
|           | Forward    | Forward tasks to other users. An icon 💌 is displayed beside tasks that have been forwarded. |
|           | Complete   | Complete tasks, with or without adding notes to them.                 |
|           | Delete Task | Delete tasks.                                                         |
|           | Batch Processing | Complete and archive multiple tasks.  
**Note:** If necessary you can undo a completed batch of tasks. |
| Actions   | Archive Tasks | Archive tasks. You can only archive completed tasks; this option is only displayed when you select Completed in the navigation pane, or select a completed sent task (indicated by a green tick ✅). |
|           | Activate Tasks | Activate or reactivate tasks that were completed in error and need further action. |
|           | Make Appointment | Access the Find Appointments screen and book an appointment for the patient that the task relates to. This option is only available for patient task types. |
|           | View Report | View the pathology/lab report that a task relates to. This option is only available for tasks added in Lab Reports. An icon 📋 is displayed beside tasks generated from pathology reports. |
Adding new tasks
There are many different types of task available in EMIS Web, grouped into two main types:

- Patient tasks: used for actions or information linked to specific patients.
- Admin tasks: used for general administration, and not related to specific patients.

Add a patient task
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - On the ribbon, click Add Task.
  - Beside the Task Type field on the Task Details screen, click ▼ and select the required task type.
    - The list displayed depends on which task types are configured as available.
  - Beside the Patient field, do one of the following:
    - Click ▼ and select the current patient's name.
    - OR
    - Click , and then use the Patient Find screen to find and select the required patient.
  - In the Due Date field, type the date by which the task is to be actioned, or click ▼ and then select the required date. The default is today's date.
  - Beside the To field, click ▼ and then use the Find Teams or Users screen to select the required recipient.
    - If you have configured a default recipient for the selected task type, that recipient is displayed in the To field. However, you can change the recipient, if required.
  - If required, and if you are sending the task to more than one recipient, select All Recipients to Action Task.
    - If you select this option, a separate task is sent to each selected recipient, and they must all action the task.
  - In the Notes field, type details of the action required. The maximum number of characters you can type in this field is 8000. A counter at the bottom of the screen indicates the number of characters you have used.
    - If required, select Urgent.
  - Click Send.
    - The task is sent to each selected recipient and displayed in their To-Do List. A separate task for each recipient is displayed in your Sent Tasks list.
      - A red arrow is displayed beside high priority tasks, and they are displayed at the top of the list.

Add an admin task
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - On the ribbon, click Add Task.
  - Beside the Task Type field on the Task Details screen, click ▼ and select the required task type.
    - The list displayed depends on which task types are configured as available.
  - In the Subject field, type the subject of the task.
If a patient is already selected, the name of this field is displayed as 'Patient' until you select a non-patient task type in the Task Type field.

- In the Due Date field, type the date by which the task is to be actioned, or click \(
\) and then use the calendar to select the required date. The default is today's date.

- Beside the To field, click \(\) , and then use the Find Teams or Users screen to select the required recipient.
  - If you have configured a default recipient for the selected task type, that recipient is displayed in the To field. However, you can change the recipient, if required.

- If required, and if you are sending the task to more than one recipient, select All Recipients to Action Task.
  - If you select this option, a separate task is sent to each selected recipient, and they must all action the task.

- In the Notes field, type details of the action required.
  - The maximum number of characters you can type in this field is 8000. A counter at the bottom of the screen indicates the number of characters you have used.

- If required, select Urgent.

- Click Send.
  - The task is sent to each selected recipient and displayed in their To-Do List. A separate task for each recipient is displayed in your Sent Tasks list.
  - A red arrow \(\uparrow\) is displayed beside high priority tasks, and they are displayed at the top of the list.

**Change the owner of a task**

- Access Tasks.
  - Click \(\) , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.

- In the navigation pane, click the required task category.

- In the right-hand pane, click the task you want to assign to a different owner.

- Do one of the following:
  - On the Tasks ribbon, click Change Owner in the Actions Section, and then select the required user from the list of recently selected users.
  - On the Tasks ribbon, click Change Owner, and then use the Find Teams or Users screen to select the required user or team.
    - The names of users who are out of the office are greyed out in both these places.
    - The task is assigned to the selected user or team.

**Add a note to a task**

Use notes for non-essential information only, because the information in notes added to tasks is not auditable, and if you reply to or forward a task with a note attached, the note is not sent with the reply.

- Access Tasks.
  - Click \(\) , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.

- In the navigation pane, click the required task category.

- In the right-hand pane, click the task you want to add a note to.

- On the ribbon, click Add Note.

- On the screen displayed, type the text of the note, and then click Close.

  The following changes are made:
  - The note is attached to the task, but is not part of the main body of the task in the Notes field.
  - On the Tasks screen, an icon \(\) is displayed beside the task; all senders and recipients can view the note, by clicking the icon.
  - In the Diary section of Care Record, an icon \(\) is displayed beside any tasks in the Current Items section and the Tasks section that have notes attached to them. You can hover your cursor over the
Details column of the tasks list to view tooltips showing any free text that was typed in the Notes field on the User Task Details screen when the tasks were added.

- To remove a note from a task, select the task, and then click **Delete Note** on the ribbon.

**View the history of a task**

- Access Tasks.
  - Click , point to **Workflow**, select **Workflow Manager**, and then click **Tasks** in the navigation pane.
  - In the navigation pane, click the required task category.
  - In the right-hand pane, click the required task.
  - On the ribbon, click **View History**.
  - The Task History screen is displayed, showing the history of the task.
  - To close the Task History screen, click **Close**.

**Reply to a task**

You can only reply to tasks in the To-Do List. You cannot reply to cross-organisation tasks if the creator organisation does not accept tasks.

- Access Tasks.
  - Click , point to **Workflow**, select **Workflow Manager**, and then click **Tasks** in the navigation pane.
  - In the navigation pane, click **To-Do List**.
  - In the right-hand pane, click the task that you want to reply to.
  - On the ribbon, click **Reply** and select one of the following:
    - **Reply to Sender**, if the task was sent by one user.
    - **Reply to All**, if the task was sent by more than one user and you want to reply to all the senders.
  - The User Task Details screen is displayed, with some details already completed.

- If required, in the Due Date field, type or select a different date. The default is today’s date.
- If required, beside the To field, click , and then use the Find Teams or Users screen to select a different recipient. The default is the owner(s) of the task.
- If required, select **All Recipients to Action Task**.
- In the Notes field, type your reply.
The maximum number of characters you can type in this field is 8000. A counter at the bottom of the screen indicates the number of characters you have used.

- If required, select **Urgent**.
- Do one of the following:
  - To send the reply and complete the task, click **Send & Complete**.
    The reply is sent to the selected recipient(s) and the task is moved to the Completed category.
  - To send the reply without completing the task, click **Send**.
    The reply is sent to the selected recipient(s), and another task is created for the original sender, based on your reply. The task also remains on your To-Do List.

- An icon 📩 is displayed beside tasks that have been replied to.

**Forward a task**

You can only forward tasks in the To-Do List.

- Access Tasks.
  - Click 🔄, point to **Workflow**, select **Workflow Manager**, and then click **Tasks** in the navigation pane.
  - In the navigation pane, click **To-Do List**.
  - In the right-hand pane, click the task that you want to forward to another user.
  - On the ribbon, click **Forward**.
    The User Task Details screen is displayed, with some details already completed.
  - If required, in the Due Date field, type or select a different date.
    The default is today’s date.
  - Beside the To field, click ✉️, and then use the Find Teams or Users screen to select the required recipient(s).
  - If required, select **All Recipients to Action Task**.
  - If required, in the Notes field, type any additional information.
    The maximum number of characters you can type in this field is 8000. A counter at the bottom of the screen indicates the number of characters you have used.
  - If required, select **Urgent**.
  - Do one of the following:
    - To forward and complete the task, click **Send & Complete**.
      The task is forwarded to the selected recipient(s) and moved to the Completed category.
    - To forward the task without completing it, click **Send**.
      The task is forwarded to the selected recipient(s), and another task is created for the original sender. The task also remains on your To-Do List.
  - An icon 📩 is displayed beside tasks that have been forwarded.

**Complete a task**

You can only complete tasks in the To-Do List.

Hold down **Shift + left-click** or **Ctrl + left-click** to select multiple tasks.

- Access Tasks.
  - Click 🔄, point to **Workflow**, select **Workflow Manager**, and then click **Tasks** in the navigation pane.
  - In the navigation pane, click **To-Do List**.
  - In the right-hand pane, click the task that you want to complete.
  - To complete the task immediately, click **Complete** on the Tasks ribbon and select **Complete Task**.
    The task is moved to the Completed category.
  - To add a note to the task and then complete it, click **Complete** on the ribbon and select **Complete Task with Note**.
    - On the Task Description screen, type the required information, and then click **OK**.
      The task is moved to the Completed category, with the note attached.
Delete a task
You can only delete tasks from the To-Do List.
Hold down Shift + left-click or Ctrl + left-click to select multiple tasks.
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - In the navigation pane, click To-Do List.
  - In the right-hand pane, click the task that you want to delete.
  - On the ribbon, click Delete Task.
  - On the Workflow Manager box that appears, click Delete Task.
The task is moved to the Deleted category.

Archive a task
You can only archive completed tasks.
Hold Shift + left-click or Ctrl + left-click to select multiple tasks.
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - In the navigation pane, click one of the following:
    - Completed Tasks.
    - Sent Tasks.
    - A green tick ✔️ is displayed beside completed sent tasks.
  - In the right-hand pane, click the required task.
  - On the ribbon, click Archive Tasks.
  - On the Task Action Confirmation screen, click OK.
The task is moved to the Archived category.

Print a task
Any items that you print for dummy patients include a 'Dummy Patient' watermark.
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - In the navigation pane, click the required task category.
  - In the right-hand pane, select the task(s) you want to print.
  - On the ribbon, click Print and select Selected Task(s).
  - If required, on the Print screen, change the printing options.
  - Click OK.
Details of the selected task(s) are printed on your default printer.

Print a task list
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, and then click Tasks in the navigation pane.
  - In the navigation pane, click the required task category.
  - On the ribbon, click Print Task List.
  - If required, on the Print screen, change the printing options.
  - Click OK.
A list of all tasks in the selected category is printed on your default printer.

Change the priority of a task
You can only change the priority of tasks on the To-Do List and Sent Tasks.
- Access Tasks.
  - Click , point to Workflow, select Workflow Manager, then click Tasks in the navigation pane.
• In the navigation pane, click one of the following:
  o To-Do List.
  o Sent Tasks.
• In the right-hand pane, click the required task.
• On the ribbon, click **High Priority**.
• On the Change Task Priority screen, click **Yes**.
  The priority of the task changes:
  o If the task was previously a normal priority task, it changes to a high priority task. A red arrow 🆕️ is displayed beside high priority tasks, and they are displayed at the top of the list.
  o If the task was previously a high priority task, it changes to a normal priority task.

**Outstanding and overdue tasks**

A tasks toolbar is displayed at the top of every EMIS Web screen, just below the ribbon, showing your current/outstanding and overdue Workflow Manager tasks.

The toolbar shows:
• Your task count for Tasks and for the other Workflow Manager modules.
  If you are acting as a deputy for another user, their tasks are included in the task count.
• A number in brackets, in **red** text, to indicate priority items.
• For Lab Reports, the red number indicates tasks with abnormal results.

Click the **Tasks** link under the ribbon, or the **Tasks** option in the navigation pane, to access Tasks and action the tasks.

In Tasks, the Due Date is displayed in **red** if the task is overdue.

**Task escalation**

If active tasks that are assigned to users or teams are not completed within a specified number of hours (the escalation interval, i.e. the amount of time in hours that can pass after the due date of a task before the task is considered overdue), the tasks are escalated to the administrators. You can configure administrators and escalation intervals for routine and urgent tasks on the Workflow Manager Configuration screen.

If a task would become overdue on a day that is not a working day for your organisation, escalation takes place on the next working day.

A task escalation report is produced each day, and tasks remain in the report until completed. If an active report already exists for the user or the administrators, EMIS Web will update the existing report rather than creating a new one.

The due date of a task is one or other of the following:
• The date specified in the Due Date field on the User Task Details screen when adding the task.
• The date when the task was created, if no date was specified in the Due Date field on the User Task Details screen.

A task is considered inaccessible if at least one of the following conditions applies to all users assigned to the task:
• The user is not currently contracted (i.e. their contract has ended or has not yet started) or has been deleted.
• The user does not have does not have the correct RBAC activity in their role profile to access Workflow Manager.
• The user does not have the correct RBAC activity in their role profile to process tasks of that type.

**Information governance notifications**

If you are a privacy officer for your organisation, you need to receive the following notifications relating to information governance:

<table>
<thead>
<tr>
<th>Task/notification type</th>
<th>Trigger action</th>
</tr>
</thead>
</table>

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## Legitimate relationship notification

A user accesses an inactive patient’s record outside the grace period configured in Patient Archive.

## Unarchived patient record notification

A user unarchives a patient in Patient Archive.

## Inactive records accessed in Reporting

A user accesses an inactive patient’s records from search results.

To make sure you receive these notifications, you need to be configured as the default recipient for these task types in the task default settings. Your organisation must have at least one user or team as its privacy officer to receive these notifications, and the privacy officer must not be any patient’s usual GP.

### Screen messaging

You can send screen messages to other users from anywhere in EMIS Web. New users are added to the list of available users automatically, but can take up to 24 hours to appear due to waiting for the messaging server to refresh.

You can send messages to users who are online, offline, or away. The colour of the circular icon beside the user’s name indicates their current status.

<table>
<thead>
<tr>
<th>Icon colour</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green</td>
<td>Online (user is logged into EMIS Web).</td>
</tr>
<tr>
<td>Grey</td>
<td>Offline (user is not logged into EMIS Web).</td>
</tr>
<tr>
<td>Yellow</td>
<td>Away (user has locked their session or is in a consultation).</td>
</tr>
</tbody>
</table>

- A user’s status is updated immediately, so there is no need to refresh.
- A green flag is displayed in the bottom right-hand corner of the screen when a user is available to receive a message. A yellow flag is displayed when the user is in a consultation.

If Screen Messaging is unavailable, a warning message will appear stating: Screen Messaging is currently unavailable because EMIS Web cannot connect to the messaging server. Try again later.

If you receive this message, try logging out and back in, or try using Screen Messaging again later.

### Send a screen messages

- Screen messages should not be used for clinical emergencies.
- If urgent clinical assistance is required then the Panic Alerts function should be used instead.
- On the quick access toolbar, click the screen message icon 📩 to display the Send Screen Message screen.
Send Screen message screen

- In the Subject field, type the subject of the message, up to a maximum of 100 characters.
- In the Message field, type the message you want to send, up to a maximum of 500 characters.
- If the message is urgent, select Urgent. Urgent messages trigger a separate alert, displayed in the middle of the user’s screen. Users can click View to read the message, or Close to view later.

Urgent Message screen

- Urgent messages are also displayed in the same yellow alert bar as normal messages. Clicking the link will launch the message viewer, which enables users to view, reply to and/or discard any messages they have received.
- If there are urgent messages, an Urgent column is displayed on the left of the Messages section to indicate which messages are urgent. If there are no urgent messages, the additional column is not displayed.

- Select the user(s) you want to send the screen message to.
  - Users can be displayed alphabetically, or by job role. You can show/hide offline users and also use the Find User section by typing in the first few letters of the forename or surname. The maximum number of recipients per message is 100.
- Click Send. The message is sent to each selected user and displayed in a yellow alert bar above the patient précis on the EMIS Web screen they are currently viewing. Only one alert bar is displayed, with a link to the message(s). Clicking this link will launch the message viewer which enables users to view, reply to and/or discard any of the messages they have received.
If a user tries to close the alert bar using the red cross, a warning is displayed, as this will delete the messages permanently.

- There is no audit trail available for sent messages.

**Reply to a screen message**

If you receive a screen message, you can do any of the following:

- Send a reply to the sender only
  - Select the message and click **Reply**.
  - The Send Screen Message screen is displayed, with the sender’s name selected.
  - In the Message field, type your reply.
  - Click **Send**.

  OR

- Send a reply to everyone who received the message
  - Select the message and click **Reply All**.
  - The Send Screen Message screen is displayed, with all recipients' names selected.
  - In the Message field, type your reply.
  - Click **Send**.

**Discard the message**

Select the message and click **Discard**.
If you discard a message, it cannot be retrieved.

**Consultations (Clinical)**

**Configure the homepage to show appointments**

You can configure the homepage with your own personal preferences.

- At the top right-hand corner of the homepage, click **Configure Homepage**.
- On the Configure Homepage screen, to display appointments for a selected user/location on your homepage, do the following:
  - In the Appointments section, select **Show Appointments on homepage**.
  - In the Session Holder field, click and then use the Find Session Holder screen to select the required session holder or location. Double-click the selected session holder/location, to select and then click **OK**.

**Automatically open a consultation on Send in**

You can configure the Appointment Book to automatically open a consultation when a patient is sent in for your profile.

- Access the Appointment Book.
  - Click **point to Appointments, select Appointment Book, and then on the ribbon, click Appts Config**. The Appointments Configuration screen is displayed
- In the left-hand pane, under User Options, select the **General** tab.
- In the New Consultation section, click **Start new Consultation** next to the On a registered patient send in option.

Consultations are the most common way of adding information to patients' care records. There are three main types of consultation available in EMIS Web. The type(s) you use must be decided at organisation level, because the decision affects the whole organisation. The three types of consultation are:
• **Header-based:** The consultation type most EMIS users will be familiar with and the one most suited for GP organisations and community practitioners.

• **Quick note consultation:** A free-text only version; you can’t use quick notes to record coded information.

• **Template consultation:** This type is not generally suited to GP organisations.

To add a consultation, you must have RBAC activity B0380 in your role profile, and be configured as a consulter in the Role section of the Add User or Edit User screen in Organisation Configuration.

**Access the New Consultation screen.**

- Click , point to Care Record, and then select Consultations.
  
  **NOTE:** If you do not have a patient selected, you are prompted to choose one.
  
  o On the ribbon, click Add and select the required consultation style. You will be prompted to complete the Consultation Properties screen first.
  
    o Add the following information to the consultation, as required:

**Consultation properties**

When you add a consultation to a patient’s care record, use the Consultation Properties screen to specify key features of the consultation, for example, the date, the consulter and the location.

You can only select someone as a consulter who has already been configured as a consulter in organisation configuration; they will not show in the picking list unless they’ve been setup as a consulter.

You can also store the settings on the Consultation Properties screen as the default for your session; this means you only have to complete this screen once in a session.

**Complete the Consultation Properties screen**

- Access the New Consultation screen.
  
  o Click , point to Care Record, and then select Consultations.
    
    If you don’t have a patient selected, you’re prompted to choose one.
  
  o On the ribbon, click Add and select the required consultation style.
    
    ▪ If required, type the required date in the Date field.
    
    ▪ In the Time field, type the required time.
    
    ▪ If you don’t want to specify a time, highlight the time, and then press DELETE.

- Do one of the following:
  
  o Record a consultation at your organisation.
  
  o Select My Organisation, and then complete the Consulter and Location fields.
  
  o The Location field is automatically populated with your organisation’s main location.

**OR**

  o Record a consultation external to your organisation.
  
  o Select External Organisation, and then complete the Organisation and External Consulter fields.
  
  o In the Consultation Type field, click and select the required consultation type.
  
  o If required, beside Extended Properties, click to add further details:
    
    ▪ In the Travel field, type the required number of minutes.
    
    ▪ In the Miles field, type the number of miles travelled.
    
    ▪ In the Duration field, type the required number of minutes.
    
    ▪ If another HCP was present during the consultation, in the Accompanying HCP field, click , and select the required user.
  
  o If required, select Store as default for this session, and then click OK.
If you select this option, the same details are automatically added for all consultations in the session. If you are backdating a consultation, you need to either leave the option blank to make sure the date/time is not recorded incorrectly for other consultations, or edit the consultation properties for other consultations and select today’s date/time.

*Consultation Properties screen highlighting the Store as default for this session option*

![Consultation Properties screen](image)

**New Consultation screen and ribbon**

You can click the contact slider at the bottom of the screen to change the level of detail displayed in the bottom pane (displaying the previous ten consultations). To open a document attached to a previous consultation while you have a new consultation open, double-click 📝.

- If you cannot see the slider look for the Latest Contacts Tab 📜 at the bottom left hand side of the screen and click this tab.

*The New Consultation screen with the contact slider in the bottom pane*

If you selected a header based consultation, a list of headings is displayed on the left-hand side of the screen. Use these headings to add different information to the patient’s consultation.

![Consultation headings](image)

The column on the right-hand side of the New Consultation screen contains two tabs: Summary and Resource. Depending which option is highlighted, depends on the information shown here.
NOTE: When you add a new header based consultation or quick note, the New Consultation ribbon is displayed.

Add a New Consultation
You can now cut, copy or paste text in an open consultation. Highlight the text and then do one of the following:

- Right click and select Cut, Copy or Paste.
- Press Ctrl+X to cut.
- Press Ctrl+C to copy.
- Press Ctrl+V to paste.

Add a New problem
NOTE: If you do not have a patient selected, you are prompted to choose one.

From the Problem section of the Consultations screen, select the required problem, or start to type the problem condition or clinical term. As you type, a list of problems matching your criteria is displayed. The code list is based on commonality (i.e. the more often you select a code, the higher up the list it moves).

- To add a problem that is not in the list, press F4 to view a more extensive list of codes, and then select the required problem code.
- When you select a problem code, the default significance details for the problem are displayed, underneath the problem.
  - If required, click the Drop down arrow next to Active Problem, and then select one of the following:
    - Active problem
    - Health Administration.
    - Past/Ended Problem.
  - If required, click the Drop down arrow next to Minor, and then select Significant or Minor.
  - If required, click the Drop down arrow next to First Episode, and then select one of the following:
    - New Episode
    - Review
    - Flare Up
    - End Episode
  - If required Click the Drop down arrow next to Remains active for 28 days, and then select one of the following:
    - 7 Days
    - 14 Days
    - 28 Days
    - 3 Months
    - 6 Months
    - 1 Year
    - Indefinitely
    - Custom (and then type the required number of days).
  - If you add a problem that is already in the patient's record, it is automatically added as a review. If you add a new problem in a consultation as a review and select an onset date other than today, the onset date is reset to today’s date when any medication is added.
  - If required, select Set default duration for organisation. (option only available once you have set the activity to 3 months)
The default duration is then automatically set for future problems added with the same code, although it's still possible to amend the duration for each problem individually.
Consultation screen with the Set as default duration for organisation option highlighted

- If required, you can manage related problems. Click **Action**, and then select one of the following:
  - Combine
  - Evolve
  - Group
- The Select Problems to manage screen is displayed.
  - Select the problems which you want to Combine/Evolve/Group.

### Add Multiple Problems

To record another problem that the patient has presented with click the Next Problem button on the toolbar this will add another section for you to be able to record the details for a different problem.

To add another problem

- Click **Next Problem** on the ribbon, and then follow the steps detailed in the New Problem section above.

### Add an Examination

In the list on the left hand side of the screen select the option Examination, this will add an area for you to enter the examination details in the consultation area. Click on the down arrow next to the lightning strike this will show you the most recent that you have used. If the examination is not listed just enter the text in the box provided.
Referral

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

- From the New Consultation screen, press R, and then select either **NHS e-Referral**, **Inbound Referral** or **Standard Outbound Referral** as required.
  To use e-Referral Service functionality, you must log on to EMIS Web using your smartcard.
  - Complete the Inbound Referrals or Outbound Referrals screen, as required.
    The referral is added to the consultation, the Referrals screen and, if appropriate, the Referral Management section of Workflow Manager.

Run a template

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

- From the New Consultation screen, click **Run Template** on the ribbon.
- On the Template Picker screen, do one of the following to select a template, and then click **OK**:
  - Select a template from the Recently Used list.
  - Type the name of the required template, click ![search_icon](search_icon.png), and then select the template from the results.
  - In the Navigator pane, navigate the hierarchy, and then select the template.
- To view details about a template, click the **Details** tab when the template is selected.
  - Complete the template, and then click **OK** to add the information to the consultation.
  - To help you complete templates quicker, you can use TAB to move through the fields, and then use the SPACEBAR to select or deselect the tick boxes.
  - When completing a template with a diary entry, highlight the date field and enter either 3m (3months), 1y (1 year) to automatically change the date instead of using the calendar.

Add a document.

**NOTE:** If you do not have a patient selected, you are prompted to choose one.

- From the New Consultation screen, click **Documents**, and select from **Create Letter**, **Attach Document** or **Attach Existing Document**, as required.
- Select one of the following depending on what option you selected at step 1:
  **Create Letter**:
  - Do one of the following:
    - To create a letter from a blank document, select **New Document**.
    - To create a letter from a template, select a previously used template, or click ![edit_icon](edit_icon.png), and then use the Find Document Templates screen to select the required template.
    - Click **OK**.
      - If you double-click the required option, the screen closes and the document opens.
      - If prompted, complete the Patient Letter Details screen.
  - The document is displayed on the New Consultations screen, which consists of EMIS Web controls in the left-hand pane and your version of Microsoft Word in the main pane. Microsoft Word versions 2003, 2007 and 2010 are compatible with the EMIS Web system, providing you have the latest updates.
    - Compose the letter, as required.
    - You can use the tabs in the left-hand pane to add information from the patient’s care record.
  - In the left-hand pane, click **File** and select **Save As**.
  - On the Document Properties screen, in the Document Type field, click ![code_selector_icon](code_selector_icon.png) and select a previously used document type, or click ![edit_icon](edit_icon.png), and then use the Code Selector screen to select a document type.
    - In the Source field, click ![code_selector_icon](code_selector_icon.png) and select a previously used source, or click ![edit_icon](edit_icon.png), and then use the Find Service screen to select a source.
    - In the Document Title field, type an appropriate document title.
    - In the Date field, click ![calendar_icon](calendar_icon.png) and select a date for the document entry.
- If required, to create a consultation reference for the document, select Create a consultation for letter.
  - If you are using existing templates, default properties will be used when the document is saved.
  - Click OK to save the document and, if configured, create a consultation reference.

**Attach Document:**
- On the Open screen, locate the required document, and then click Open.
- Complete the Attach Document screen, and then click File to attach the document to the consultation and display it on the Documents screen.

**Attach Existing Document:**
- On the Care Record Picker screen, select the box for the required document.

Click OK to attach the document to the consultation and display it on the Documents screen.

**Add More Information**

- From the New Consultation screen, click the required heading.
- On the Consultations screen, add the required information, and then press ENTER twice to return to the headings.
- If you add weight and height information to a consultation, you are prompted to calculate and add the patient's BMI. If you edit weight and/or height information, you are then also prompted to recalculate the patient's BMI.
  - You can record values with inequalities for codes, e.g. <, >, <=, >=, ~, ~=. For example, you can record a healthy human concentration of C-reactive proteins as <10 mg/L. You can also record negative values.
  - Inequality is not supported with height and weight values (metric or imperial).

When you have completed the consultation, do one of the following:

- On the ribbon, click Save.
- On the ribbon, click Save as draft.
- To cancel the consultation without saving, on the New Consultation ribbon, click Cancel, and then click Yes to confirm.

**Add a review consultation**

- Access the New Consultation screen.
  - Click , point to Care Record, and then select Consultations.
    **NOTE:** If you do not have a patient selected, you are prompted to choose one.
  - On the ribbon, click Add and select the required consultation style.
- To add a review problem to the consultation, select the problem and press P.
- To select a problem from the list, double-click the required problem; this will display the default significance details for the problem.
- Follow the procedure in the Additional problem section.
- Refer to Add a new consultation for information on how to add information to a consultation.
- When you have complete the consultation, click Save on the ribbon to save the consultation and add the details to the Consultations screen.
  - To cancel the consultation without saving, click Cancel on the ribbon, and then click Yes to confirm.

**Add a quick note**

You can add quick notes to consultations.

- Access the New Consultation screen.
  - Click , point to Care Record, and then select Consultations.
    **NOTE:** If you do not have a patient selected, you are prompted to choose one.
  - On the ribbon, click Add and select the required consultation style.
• Type the required information.
• When you have completed the consultation, click Save on the ribbon to save the consultation and add the details to the Consultations screen.

Prescribing & Issuing Medication

Acute Medication

In the Medication module, the screen will appear in 3 sections, Acute, Repeats and Repeat Dispensing, but only if the patient has had these prescribed. Use the Add Drug screen to add one or more items of medication to a patient’s record, issue any current medication and restart any past medication. You can also use the Add Drug screen to add further prescribing detail, such as dosage and quantity, prescription type, pharmacy and patient information, review date, days before next issue and authorising clinician.
You can link medication to any of the patient’s problems (for example, link an issue of Salbutamol to the problem Asthma).

• Access Medication.
  o Click to point to Care Record, and then select Medication.

  NOTE: If you do not have a patient selected, you are prompted to choose one.
  o The Medication screen is displayed.
  o To include a reminder note on the prescription, click Patient Actions on the ribbon and select Send Reminder. The reminder will be printed on the next prescription added, issued or reprinted for the patient. To configure the reminder note text, use the Medication Configuration screen: select Organisation Options, and then type the text in the Right Hand Side section.
  o On the ribbon, click Add Drug.
  o On the Add a Drug screen, type the name of the drug you want to prescribe, and then select the required item from the list.

  o As you type, the drugs that match your text (and their generic/trade equivalents) are displayed.
  o The order the drugs are displayed in the picking list depends on how frequently your practice has selected these items; e.g. if you type ‘para’ (for paracetamol), then the drugs you prescribe most frequently containing these letters are displayed at the top of the list.

• To populate the Dosage and Quantity fields, do one of the following:

  o Select a previous dosage/quantity. To remove an incorrect dosage/quantity that you have previously added (displayed in blue), click Remove. You cannot remove any default recommendations (displayed in black).
  o In the appropriate fields, type a new dosage and quantity (maximum of 400 characters).
  o If you type an unrecognised dosage, the Dosage screen is displayed, prompting you to add details of the dosage. Take care when completing this screen, as the information you add affects duration calculations.
  o Select a previous dosage, or select a new one, and then specify the quantity by clicking one of the items in the Pack Details pane. If the dosage is calculable, the duration is also specified.

Note: If you selected Always Warn when Automatically Adjusting Pack Size on the Medication Configuration screen (Organisation Options, General) and you specify a quantity that is 90% of a complete pack size, you are prompted to change the quantity to issue the entire pack: click Yes to change the quantity, or click No to continue with the specified quantity.

Repeat Medication

Issue medication
• Access Medication.
Click , point to Care Record, and then select Medication.

NOTE: If you do not have a patient selected, you are prompted to choose one.

The Medication screen is displayed.

Access the Issue screen.

Use one of the following options:

If you are issuing existing medication, select the required medication on the Current Medication screen, and then click Issue (or Reauthorise and Issue).

If you are adding new medication, the Issue screen is displayed when you click Issue after completing the Add a Drug screen.

If the item needs reauthorising, the Reauthorise Medication screen is displayed.

The Approve and Complete option on the Issue screen is disabled until you have reauthorised any medication that needs reauthorisation.

The Issue screen is displayed, with the patient précis showing the patient details that will be printed on the prescription (including EPS pharmacy information, if appropriate).

All issue types are displayed on the same screen, listed by type if there is more than one type. If the medication items will not all fit onto the screen, a scrollbar is included.

If required, deal with any warnings and/or safety alerts.

If required, change the stamp doctor for this issue only, click To be signed by, and then use the Find Users screen to select the required stamp doctor.

If required, use the options located at the top and bottom of the screen, using the section below as a guide.

All controlled drugs are printed on the same prescription as normal medication. However, any medication that is dispensed by a hospital is printed on a separate prescription.

**Complete the issue**

Do one of the following:

- To issue all items that need no further action, click Approve and Complete.
  This option is disabled if any item needs reauthorisation or is subject to a medium or high severity warning.
- To approve and issue all items for a prescription type, click Approve and Next.
  EMIS Web automatically selects the next issue type, or you can click Next at the bottom of the screen to move to the next type.
  When you have approved all prescription types, the items are issued.
- To send a prescription request, click Request.
  The Issue Request screen is displayed; complete the details, and then click Request.
  You can no longer edit medication from the medication screen if there is a pending request task. You now need to open the Workflow Task in Workflow Manager to edit the item.

**Add data using a template**

Access Care Record.

- Click , Click Care Record.
  NOTE: If you do not have a patient selected, you are prompted to choose one.
  On the ribbon, click Add and select Data using Template.
  On the Template Picker screen, to select a template, do one of the following:
The list of recently selected templates is user specific.

- To search type the name of the required template, click , and then select the template from the search results.
- Navigate the folder hierarchy in the Navigator pane, and then select the template.
  - Click the Details tab when a template is selected to view information about the template.

- Click OK.
- Complete the Consultation Properties screen, and then click OK.
- Complete the selected template.
  - If the template has more than one page, select the required page number in the right-hand pane and then complete the screen.
- To view data that has previously been added to the patient's care record using a template, click .
  - This icon is only displayed beside data if a previous entry exists.
  - The Trend screen is displayed, showing a tabular and/or graphical view of any previous entries.
- If required, click Tabular.
  Each entry for the selected data is displayed, including the date when the data was added.
- To edit the consultation properties from within the template, click Date/Consulter/Place on the ribbon, and then edit the Consultation Properties screen as required.
  - If you want a user to be able to record consultation data under their own name, make sure they're configured as a consulter.
- Click Save.
  The data is added to the patient's care record.

**NOTE:** Users must not enter clinical data as free text.

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**Save a consultation**

When you have completed a consultation with all relevant data save the consultation using the Save Button on the consultation ribbon, this will close the current consultation for the patient.

**Edit a consultation**

- Access Consultations.
- Click point to Care Record, and then select Consultations.
  
  **NOTE:** If you do not have a patient selected, you are prompted to choose one.
- The Consultations screen is displayed.
- Do one of the following:
  - In the Date Navigator, select the consultation you want to edit.
  - In the consultation main pane, click any detail of the consultation you want to edit.
- On the Consultations ribbon, click Edit Consultation.
- On the Consultation Edit screen, edit the consultation as required, and then click Save on the ribbon.

You can view the audit trail of a consultation that has been edited by double-clicking this icon beside the required consultation to open the Audit Trail Viewer screen.

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**Locking your session, logging off and closing EMIS Web**

You must lock your session every time you move away from your PC. This helps to reduce the risk of someone else using your session, either inadvertently or maliciously.

**Lock your session (no smartcard)**

- Click point to Session, and then select Lock Session.
  
  The EMIS Web Locked screen is displayed and EMIS Web is locked.
- Do one of the following:
To unlock EMIS Web, type your password in the Password field, and then press **ENTER**.

- If you type your password incorrectly three times, EMIS Web locks your account and you must ask your system administrator to unlock it.
- To close EMIS Web, click **Close EMIS Web**, and then click **Yes** to confirm.

**Lock your session (with smartcard)**

- Remove your smartcard from the smartcard reader. EMIS Web locks and the GEM Authenticate screen is displayed.
- To access EMIS Web, type your PIN in the Passcode field, and then select **OK**.

**Log off EMIS Web**

- Click **Session**, and then select **Log Off**. The Log Off screen is displayed.
- Do one of the following:
  - To log off the current session, click **Yes**.
  - The session closes and the EMIS Web logon screen is displayed.
  - To close the screen and return to the current session, click **No**.

**Close EMIS Web**

- Click **Session**, and select **Close Application**. The EMIS Web is Closing screen is displayed.
- Do one of the following:
  - To close EMIS Web, click **Yes**.
  - To return to EMIS Web, click **No**.

**User Guide Disclaimer:**
Please note that while we make every effort to keep this guide up to date. The screen shots are for illustrative purposes and may differ from your Live system as this is configured by each organisation.
### Emis Web Function Keys

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