2025

EMIS Web for Beginners

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

North West London

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NHS North West London

Introduction

This user guide is aimed at providing staff with a basic understanding of EMIS Web.
Staff will still require specific role-based training and this is highly recommended.

Smartcard Access

Your sponsor (usually the Practice Manager) requests access for you by completing an RA02 form and sending it to the Registration Authority (RA), alongside 3 proof of identity including a photo ID.

Access rights to EMIS Web are based on roles on your smartcard (RBAC).
Your sponsor for each unit you wish to have access to, will need to complete an RA02 form.

Please keep your Smart Card secure and not to share access details with others.

It is a chip & pin card. Smartcards will have:

- Your name
- Your Photo
- Your Unique Universal Identification Number (UUID)

Log into EMIS Web

Two ways to log in:

Option 1 – NHS Smartcard Access

No one should use the system without using their **Own** Smartcard.
Using your Smartcard will ensure that you are connected to the Spine.

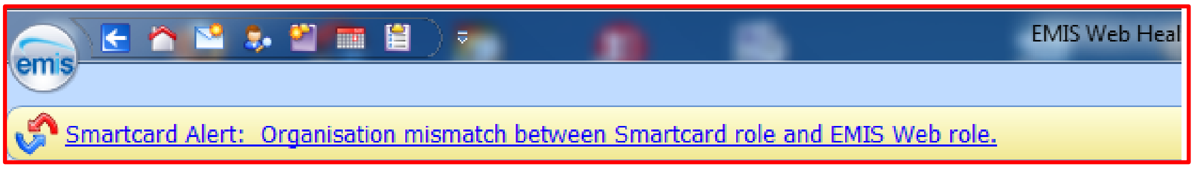
- Place your smartcard into the smartcard reader.
- The Authenticate screen is displayed.
- Enter your passcode/pin.
- If required, on the Role Selection screen, select the appropriate role.
  - If you only have one role, that role is displayed by default.
- The Authenticate icon is displayed in the 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 you log onto EMIS Web using a smartcard for the first time. To log in 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 (PIN), and then double-click the EMIS Web icon on the desktop.

Using your Smartcard 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 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 is faulty.
    - If you have multiple smartcard reads 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.



- To synchronise your smartcard (e.g. 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.

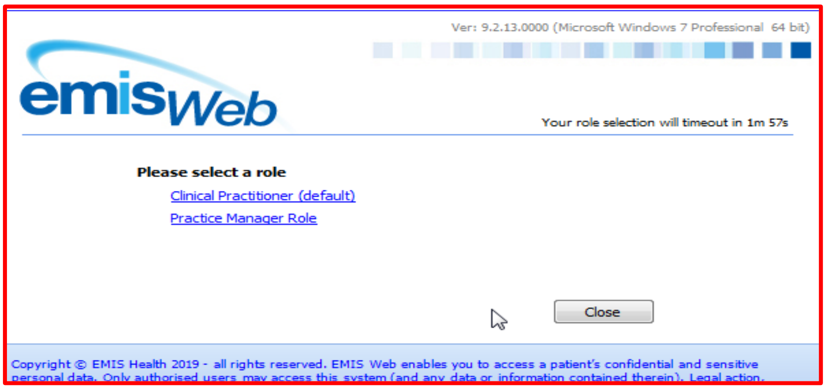
Note: Although your smartcard is not synchronised with your EMIS Web account, the permissions from the smartcard are not activated until you close EMIS Web and then log on again using the smartcard.

Option 2 – Username and Password Access

If you log onto EMIS Web without a smartcard you ***cannot*** use any Spine functionality.

- On the desk, double click the EMIS Web icon.
- The EMIS Web logon screen is displayed.

- 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.

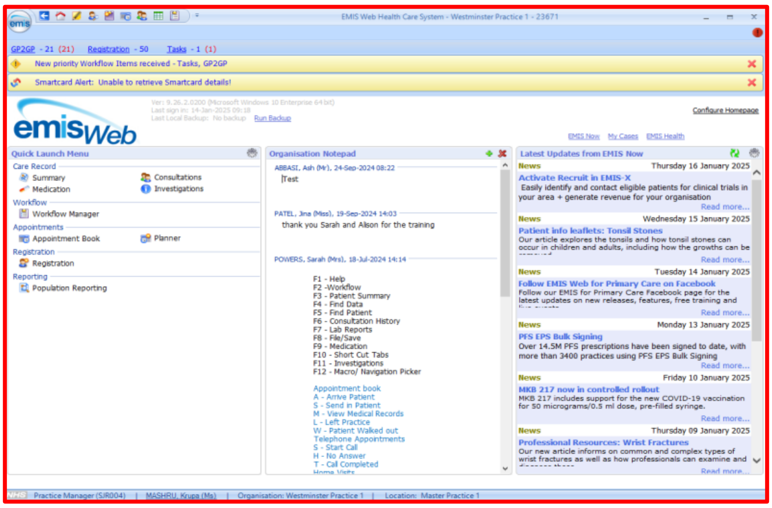


- Your currently selected role, your username and your currently selected location are all displayed in the Status bar at the bottom of all EMIS Web screens and on the EMIS Web homepage.

Navigating EMIS Web and the Homepage

Home Page

The homepage is the first page displayed when you access EMIS Web, the homepage is split into 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. Highlight the required session holder/location and then click **OK**.

Homepage Links

The following links are available from the homepage - **Top Right Hand side**:

- **EMIS Now** – Use to access EMIS Now. From EMIS Now you can view training resources and news, join community forum discussions and/or ask questions.
- **My Cases** – Use to access EMIS Now. From EMIS Now you can create new support cases 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.
    - Click **OK** and 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 quick send a message to all users in your organisation, e.g. to give details of a forthcoming team meeting.

Warning: Messages can be seen by all users.

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

Note: You can delete any of your own messages by selecting the message and then clicking 

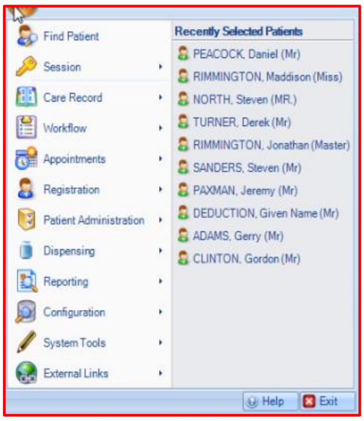
Latest Updates from EMIS Now

Use the EMIS Support News pane to view the latest news from EMIS. To view a full news article, click its title link.
These are live updates from EMIS Now (permanently displayed and cannot be removed).

Accessing Modules using the EMIS ball (button) 

You can access the EMIS ball (button) from any part of EMIS Web to quickly access any module. The EMIS ball (button) is located in to the top left hand corner of the screen.

When you click the EMIS ball (button), a menu is displayed, which you can use to select and access any of the modules. You can also use the EMIS ball (button) 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

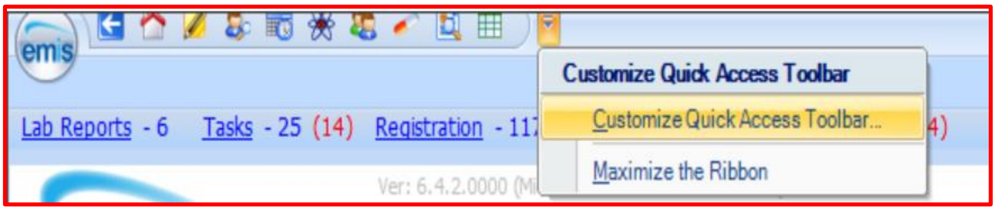
The quick access toolbar is located across the top of the EMIS Web screen, beside the EMIS ball (button). You can add shortcuts to the areas of EMIS Web that you use most frequently to access the quick access toolbar. You can then use these shortcuts to access the required area of the system with one click.

The Quick Access Toolbar has four default options, which you cannot remove:

Default Option	Use To
	Move back to the previously displayed screen.
	Access the EMIS Web homepage.
	Access the Send Screen Message screen.
	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.

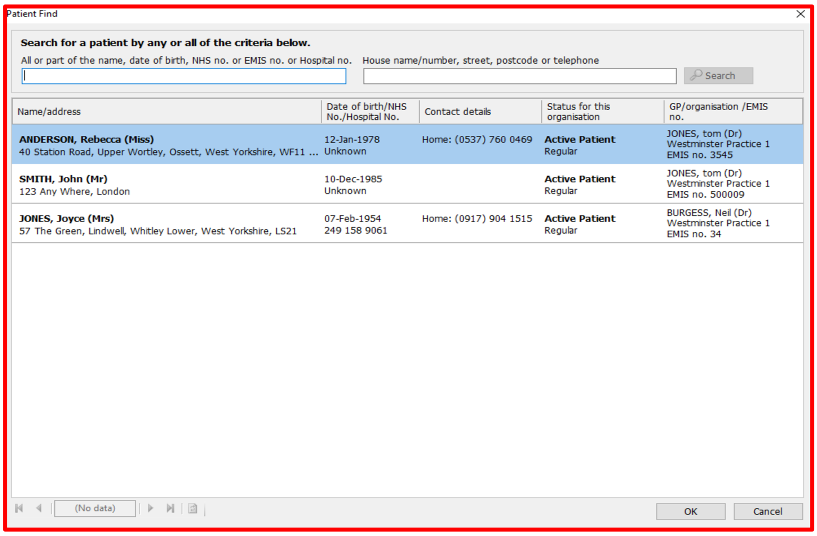
- In the left hand pane, select the required module(s), and then click **Add**.
  The selected module is moved to the right hand pane.
- Click **OK**.
  The icon for each module that you selected is displayed on the Quick Access Toolbar.

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 precis at the top of the EMIS Web screen. You can use the patient precis 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.



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

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 selected most recently are displayed in the lower section of the screen, until you search for another patient.

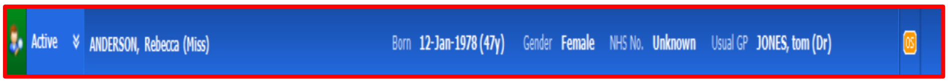
Patient details in the Patient Find are colour coded:

- 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 Patient Find function, archived patients are NOT included. If you want to search for archived patients, access Patient Archive (via **EMIS ball (button)** – **System Tools** – **Patient Archive**) and then use the Search options to access a version of the Patient Find that searches for archived patients only.

Precis Bar

When you select a patient, the patient precis is displayed immediately below the ribbon on every EMIS Web screen that you use. The patient precis 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 precis, and then selecting, View EMIS No. you can toggle between them both.

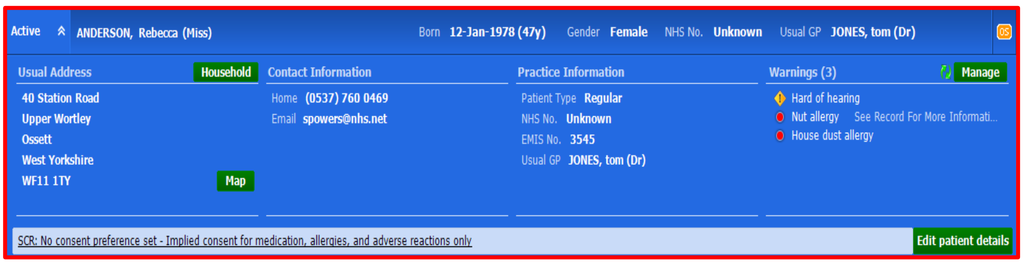
- Usual GP
- PDS Status: Blue PDS icon for synchronised patients, red PDS icon for non-synchronised patients.

The colour of the patient precis bar indicates the status of the selected patient:

Precis Bar Colour	Status of 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 Precis

You can double click anywhere in the patient precis, or click at the left hand side of the patient precis 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**: Such as telephone numbers.
- **Practice Information**: For example, patient type, patient number.
- **Patient Warnings**: Include a Manage hyperlink that enables you to access the Manage Patient Warnings screen), e.g. to inform clinicians that a patient is hard of hearing or needs a particular test.
- **Patient Allergies**: If an allergy is recorded more than once in a patient record, it is only displayed once in the patient precis, 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.
- 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 precis (e.g. restore to its default size), double click anywhere in the patient precis, or click at the left hand side of the patient precis.

View an Address on a Map

- Click on the EMIS Ball (button) and select **Find Patient**.
- Enter the patient details on the **Patient Find** screen.
- Select the required patient.
- Expand the patient precis.
- In the Address section, click **Map.**
- The patient's address is displayed in Google Maps (the address must have a postcode).

View Other Patients in the Same Household

- Click on the EMIS Ball (button) and select **Find Patient**.
- Enter the patient details on the **Patient Find** screen.
- Select the required patient.
- Expand the patient precis.
- In the Address section, click **Household.**
- The Patient Find screen is displayed, listing other patients in the same household/at the same address.

Managing Patient Warnings

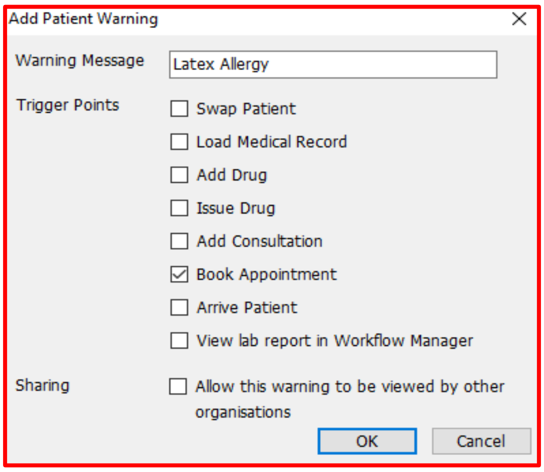
You can use the patient precis to add, edit or remove patient warnings.

Adding, editing and deleting a patient warning

- Select the required patient.
- Expand the patient precis.
- In the Warning section, click **Manage.**
    - The **Manage Patient Warnings** screen is displayed, listing any existing warnings for the selected patient.
    - At the top left 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 precis by default.
- If required, in the **Sharing** field, select **Allow this warning to be viewed by other organisations.**
- Click **OK**.

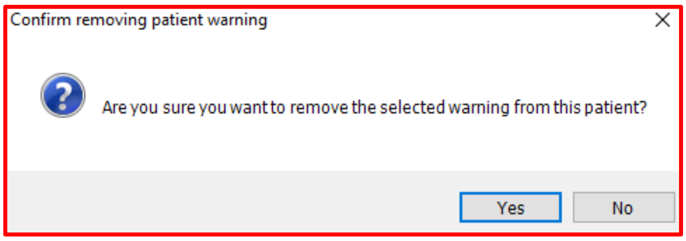


  - On the Manage Patient Warnings screen, click **Close**.
  - The warning is displayed whenever the user first performs one of the selected trigger actions.

- To edit a patient warning, click on the warning you wish to edit and select **Edit**.
- Edit the Warning Message, Trigger points or Sharing.
- On the Manage Patient Warnings screen, click **Close**.
  - The warning settings are updated.

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

- To delete a warning, click the warning you wish to remove and select **Delete**.
- On the confirmation message, click **Yes**.
- On the Manage Patient Warnings screen, click **Close**.
  - The warning is removed.

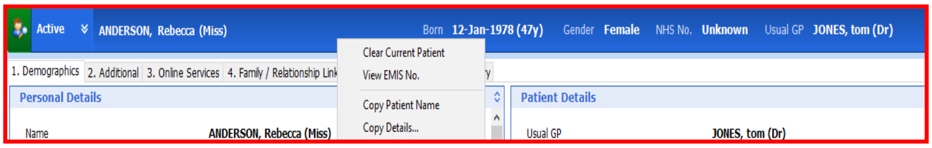


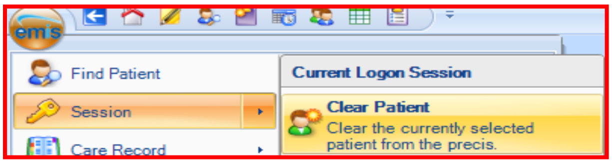
To clear the currently selected patient

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

- Right-click the patient precis and select "**Clear Current Patient**" OR

- Click **EMIS Ball (button)** – Select **Session** – **Clear**





Appointments Overview

Navigate Appointment Book

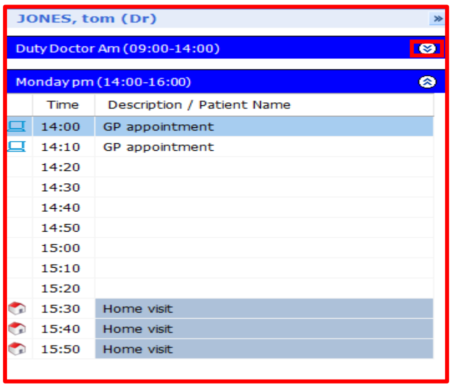
Use the Appointment Book to view your appointments for planned sessions.

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

- Select the **EMIS Ball (button)** – **Appointments**– **Appointment Book**.

If you are 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.



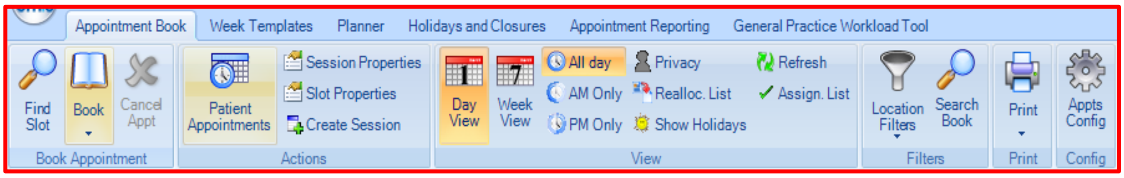
Press F10 from anywhere in EMIS Web to open the Quick View Appointments screen and view your appointments for today.

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.

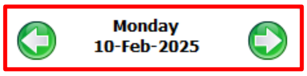


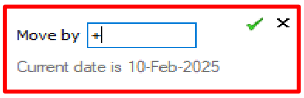
Guide to ribbon options:

Section	**Option**	**Use To**
Book Appointment	Find Slot	Find specific appointment slots.
	Book	Book appointments.
	Cancel Appt	Cancel booked appointments.
Actions	Patient Appointments	Find patients' past, future and cancelled appointments.
	Session Properties	Edit the properties of appointment sessions.
	Slot Properties	Edit the properties of appointment slots.
	Create Session	Create appointment sessions.
View	Day View	View appointment sessions for a day.
	Week View	View appointment sessions for a week.
	All Day	View all appointment sessions for a day.
	AM Only	View morning appointment sessions only.
	PM Only	View afternoon appointment sessions only.
	Privacy	Remove the patient's name from the details on screen.
	Realloc List	View the reallocation list (patients removed from cancelled appointment sessions).
	Show Holidays	View user holidays in the Appointment Book.
	Refresh	Refresh the screen.
	Assign. List	This option is only displayed if your organisation is enabled for Scheduled Appointments.
Filters	Location Filters	Apply location filters to the Appointment Book.
	Search Book	Search the Appointment Book for a patient's appointment on a selected date.
Print	Print	Print appointment information.
Configuration	Appts Config	Configure appointment options, for individual users and for the organisation.

To Navigate the Appointment Book

- Select the **EMIS Ball (button)** – **Appointments**– **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.





- 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 to3 weeks before the date you are currently viewing.

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

Session Holder Filter

You can use the 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). You can check the availability of multiple clinicians at the same time.

If a session holder has no appointment 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, or list or a location.

- In the navigation pane, click **Quick Pick**.
- On the **Find Session Holder** screen, select a session holder (using the **User Tab**), a list (using the **Lists tab**) or a location (using the **Location Tab**).
- **Double click** on your selection to add to the **Selected Items** section.
- Click **OK.**
  The selected filter is applied.

Note: The Quick Pick filter only remains for your current EMIS Web session. When you next log on to EMIS Web the Quick Pick filter is not available.

Book an Appointment for the Current Patient

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

- Within the **Appointment Book**, in the navigation pane, use the calendar to select the required date, and then select the required session.
- **Right click** on 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, click ▼ and select a template from the list or click the magnifying glass.
    - 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. 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 the 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**.

Booking an Appointment for an Unregistered Patient

- Within the **Appointment Book**, in the navigation pane, use the calendar to select the required date, and then select the required session.
- **Right click** on 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 the drop down arrow 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 un-registered patient who is then registered, you can replace the patient's details without cancelling and re-booking the slot.

Find Slot

Find and book an appointment using 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.

- Select the **EMIS Ball (button)** – **Appointments** – **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:

Field	**How to Complete**
Search From	The default is todays date. Click the calendar and select the required date.
Exclude Urgents	Select if required.
Time of day	Select one the following: **Any** – to search for appointments at any time of the day. **AM Only** – to search for appointments in the morning. **PM Only** – to search for appointments in the afternoon. **Any Time After** – to search for appointments after a specific time. Type or select the required time. **Any Time Before** – to search for appointments before a specific time. Type or select the required time. **Between** – to search for appointments between specific times. Type or select the required times.
Slot type	Click the down arrow and select the required slot type.
Languages	The default is all languages. If required, select a configured clinician's communication language. **NOTE:** Clinicians languages are configured in **Organisation Configuration** – **Users** –**Edit User** – **Language**.
Location	The default location is displayed. To change the location, click the down arrow and select the required location from the displayed list or click the magnifying glass.
For Specific Session Holders	The default is all session holders. Select a session holder, click the magnifying glass and select the required session holder(s). To remove a session holder, select the required session holder and then click the red **X**. If you select a Specific Session Holder option the Filter option is disabled, and vice versa. A list of appointments matching the selected search criteria is displayed and updates as you add more search criteria.
Filter	Click the down arrow and select the required filter. The filters displayed are your session holder filters only.

- If required, click Clear Search Criteria at the bottom of the screen to clear your selections and start again. Once you have selected the appointment, click **Book appointment** ball (button) and the book slot screen will automatically open for you to complete.

- If further filtering is required, click Advanced Criteria.
- To indicate advanced criteria has been applied, a **green banner** is displayed beside the Advanced Criteria option.

Use the following table as a guide to adding further filters, then click **OK**:

Field	How to Complete
Days to Exclude	Select any day(s) when the patient cannot attend an appointment.
Minimum Slot Duration	Click the radio ball (button) and enter the required number of minutes.
Consecutive Slots	Type or select the required number of consecutive slots.
Session Category	Click the drop down arrow and select the required appointment session category.
Gender	Select one of the following: **Any** – if the patient does not have a preference regarding the gender of the clinician. **Male** – if the patient would prefer to see a male clinician. **Female** – if the patient would prefer to see a female clinician.

- 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** and complete the **Book Slot** screen.

Slot Properties

Slot properties will show you general information if its selected when right clicked and there is no appointment booked in. If you do the same when an appointment is booked, it will also tell you the boking 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

- Select the **EMIS Ball (button)** – **Appointments** – **Appointment Book**.
- The Appointment Book 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 **Change Slot Status** – **Patient has 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.

Status	Key to press	Icon	Meaning
Arrived	A	A	The patient has arrived for their appointment.

Send in	S	S	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.
Quiet send in	Q	S	Use as an alternative to normal send in for patients who don't want their name to appear on the LED screen.
Left	L	L	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.
Walked out	W	W	The patient has walked out without attending their appointment.
Late	-	!	The patient arrived late for their appointment. The alert is shown before the patient is marked as DNA, if configured.
DNA	D	D	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 DNA's.
Visited and seen	V	-	The patient was visited at home and seen (home visits only).
Visited and not seen	N	-	The patient was visited at home and not seen, and has been marked as DNA (home visits only).
Start call	S	-	The patient has been marked as arrived for their telephone consultation (telephone consultations only).
Telephone consultation completed	T	-	The patient's telephone consultation has been marked as started and ended (telephone consultations only).
Telephoned by no answer	H	-	The patient did not answer the telephone and has been marked as DNA (telephone consultations only).

Cancel an Appointment

- Select the **EMIS Ball (button)** – **Appointments** – **Appointment Book**.
- The **Appointment Book** is displayed.
- Right click on the appointment slot you wish to cancel and then on the ribbon, click **Cancel Appt**.
- The **Cancel Appointments** window will appear – select a **reason for cancelling appointment** from the drop down list.
- If required, select **Print Cancellation Letter** and complete the printing options and save the cancellation letter in the patient record if you want.
- Click **Cancel Appointment**. The appointment is cancelled and the cancellation letter are printed, if configured.

NOTE: All the activity within the 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 on the slot and select **Slot History**.

Patient Care Record Overview

Summary

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

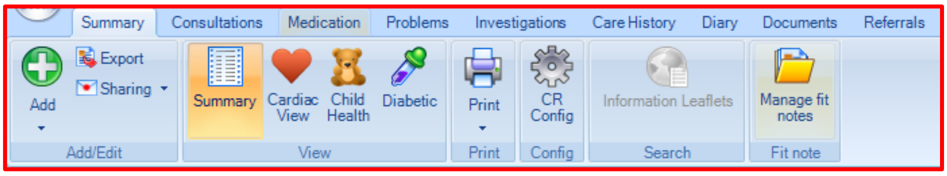
You can also access a number of pre-configured clinical views from the Summary screen, which help you to quickly display information relating to a particular discipline. As well as using the pre-configured clinical views, you can also create your own clinical views, which will be available across the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

To access the Summary screen

- Select the **EMIS Ball (button)** – **Care Record** – **Summary**.

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

- The summary screen consists of 8 panels:
    - Record Sharing
    - Problems
    - Medication
    - Allergies
    - Diary
    - Recent Activity
    - Health Status
- You can maximise ant 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:

Section	Option	Use To
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.
	Export	Export patient detail 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 • Fully 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.
Fit Notes	Manage fit notes	View existing fit notes for the patient and issue a duplicate fit notes.

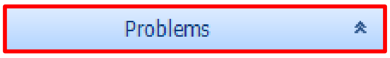
Consultations Screen

This screen allows you to create and manage patient consultations.

- Select the **EMIS Ball (button)** – **Care Record** – **Consultations**.

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

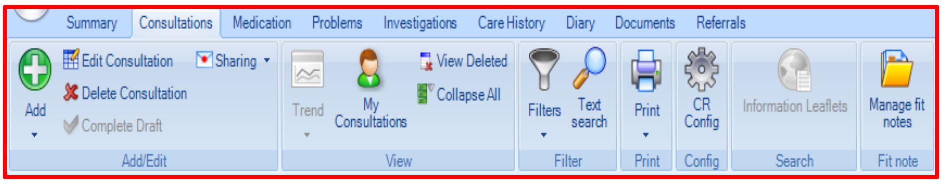
- The Consultations screen consists of 3 sections:
    - **Date Navigator (left-hand) pane:** Use this pane to select the consultation you want to view.
    - **Problems (left-hand) pane:** Expand the pane using the arrows to view problems that have been added to the patient's care record as a consultation.



    - **Main (right-hand) pane:** This pane displays all consultations that have been added to the patient's care record, including the following information:
        - Presenting problems
        - 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:

Section	**Option**	**Use To**
Add/Edit	Add	Add any of the following to a patients' care records: • Consultation • Quick Note • Telephone quick note • Code • Allergy • Referral • Document • Data using template • Diary entry • Test request
	Edit Consultation	Edit the selected consultation
	Delete Consultation	Delete the selected consultation
	Sharing	Specify whether the patient gives permission for their EMIS Web care record to be viewed and shared with other organisations.
View	Trend	Select Tabular Trend, to view the data in tabular form, or select Graphical Trend to view data in graphical form.
	My Consultations	View your own consultations only.
	View Deleted	Shows all deleted consultations.
	Collapse All	Minimises the consultations. Expand All to view the full consultations.
Filter	Filters	Add and apply a filter to the Consultation screen.
	Text Search	Search for a specific word within the Consultation screen.
Print	Print	Print any of the following: • Select items • Brief summary • Full summary • Brief summary with attachments • Full summary with attachments • Documents created from templates you have added to the Print menu
Config	CR Config	Configure organisation 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.
Fit Note	Manage fit notes	View existing fit notes for the patient and issue a duplicate fit notes.

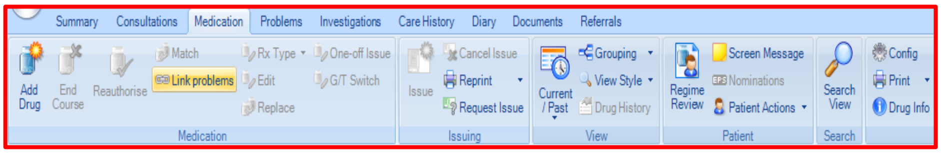
Medication Screen

- Select the **EMIS Ball (button)** – **Care Record** – **Medication**.

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

- The Medication screen consists of 1 section:
    - **Middle Pane:** This displays the patient's current prescribing record showing all acute and repeat medication.

When you access Medication a ribbon is displayed.



Guide to ribbon options:

Section	**Option**	**Use To**
Medication	Add Drug	Add new medication to the patient's prescribing record.
	End Course	Move medication to the Past Medication screen.
	Reauthorise	Reauthorise repeat items and add individual drug reviews.
	Match	Match medication that has been streamed into EMIS Web that is not currently matched to an item in the drug database.
	Link problems	Link medication to problems.
	Rx Type	Change the prescription type.
	Edit	Change the medication issue details.
	Replace	Change current drug with replacement drug.
	One-off Issue	Create a one-off acute issue from a repeat medication.
	G/T Switch	Switch medication to its generic or trade equivalent.
Issuing	Issue	Issue medication.
	Cancel Issue	Cancel the last issue of the medication.
	Reprint	Reprint a copy of original prescriptions.
	Request Issue	Request repeat or electronic prescriptions (EPS), to be signed by authorise prescribing users.
View	Current/Past	View current, past or all medication.
	Grouping	Group medication by one of the following: • 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.
Patient	Regime View	Set a date and a clinical term (optional) for general medication reviews for patients (*not* for individual medication).
	Screen Messages	Add messages to patients' prescribing records, for all users to view.
	Nominations	Nominate patients' preferred dispensing contractors when producing electronic prescriptions.
	Patient Actions	Carry out the following patient actions: • Send medication review reminders (printed on the patients' next repeat medications). • 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. • Specify prescription destinations. • Manage EPS preferences. • 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.
Search	Search View	Search using key words.
Config	Config	Configure the Medication module.
Print	Print	Print patient-related documents. You can select the level of information included: drug information only, brief or full summary.
Drug Info	Drug Info	Browse the electronic British National Formulary (BNF).

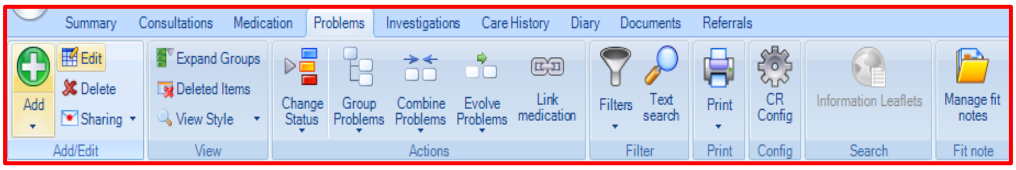
The options available on the ribbon may vary, depending on your role and the action you are taking.

Problems Screen

- Select the **EMIS Ball (button)** – **Care Record** – **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:

Section	Option	Use To
Add/Edit	Add	Add any of the following to patients' care records: • Code • Allergy • Consultation • Referral • Document • Data using Template • Diary Entry • Test Request
	Edit	Edit problems.
	Delete	Replace problems or remove them from Care Record with no replacement.
	Sharing	Specify whether the patient gives permission for their EMIS Web shared record to be viewed and for their care to be shared with other organisations.
View	Expand Groups	Expand and view grouped problems.
	Deleted Items	View recently deleted or replaced problems.
Actions	Change Status	Change the status of problems.
	Group Problems	Group and ungroup problems.
	Combine Problems	Combine and un-combine problems.
	Evolve Problems	Evolve and undo the evolution of problems.
	Medication Linker	Link medication to problems.
Filter	Filters	Apply a filter to the Problems search.
	Search View	Search the Problems 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 organisation and user consultation details, including consultation styles, types, quick picks, history, synonyms and dictionary/autocorrect settings.
Fit note	Manage fit notes	View existing fit notes for the patient and issue a duplicate fit notes.

Investigations Screen

- Select the **EMIS Ball (button)** – **Care Record** – **Investigations**.

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

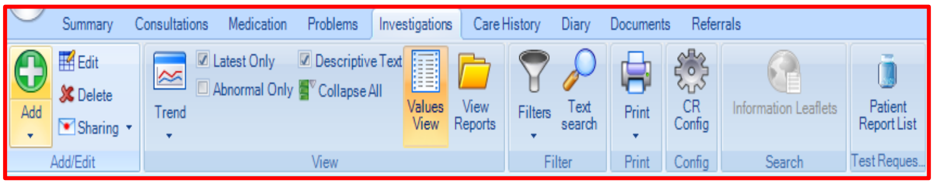
Use the Investigations screen to display all the values and results in patients' care records. You can view, filter and/or print the recorded values and results.

There are 2 views available in the Investigations screen:

1. **Values View:** Displays a list of all of the latest values in a patients' care record.
2. **View Reports:** Displays a list of all the latest lab results in a patients' care record.

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:

Section	Option	Use To
Add/Edit	Add	Add any of the following to patients' care records: • 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	Trend	• Tabular Trend – view the data in tabular form. • Graphical Trend – view the data in graphical form.
	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.
Print	Print	Print any of the following:

Config	CR Config	Configure organisation and user consultation details, including consultation styles, types, quick picks, history, synonyms and dictionary/autocorrect settings.
Patient Report List	Patient Report List	View a list of test requests completed for the selected patient through an online test service provider.

Care History Screen

- Select the **EMIS Ball (button)** – **Care Record** – **Care History**.

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

Use the Care History to view, filter and print all care events that have been added to a patients' care record. A care event includes any entry made to a patient's care record from anywhere in Care Record, e.g. 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.

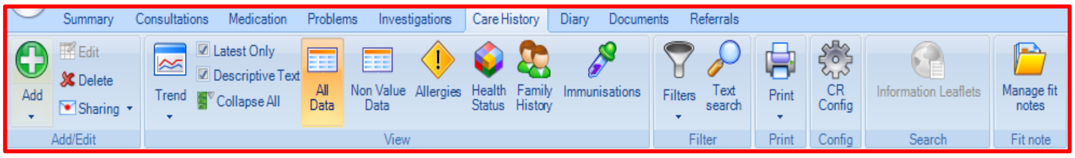
You can view attached documents on the Care History screen, by double-clicking the required document.

In the 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:

Section	Option	Use To
Add/Edit	Add	Add any of the following to patients' care records: • Code • Allergy • Consultation • Referral

		• Document • Data using Template • Diary Entry • Test Request • Fit note
	Edit	Edit codes.
	Delete	Delete codes.
	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.
View	Trend	• Tabular Trend – view the data in tabular form. • Graphical Trend – view the data in graphical form.
	Latest Only	View the latest entry on the screen only.
	Descriptive Text	View descriptive text where available.
	Collapse All	View headers, but not individual values.
	All Data	View all coded data.
	Non Value Data	View all coded data apart from the values and investigations.
	Allergies	View all coded allergies.
	Health Status	View all entries coded via the Health Status template.
	Family History	View all coded family history entries.
	Immunisations	View all coded immunisations.
Filter	Filters	Apply a filter to the Care History screen.
	Search View	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.
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.
Fit note	Manage fit notes	View existing fit notes for the patient and issue a duplicate fit notes.

Diary Screen

- Select the **EMIS Ball (button)** – **Care Record** – **Diary**.

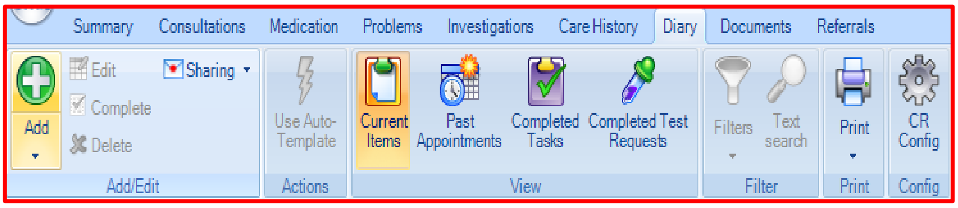
NOTE: If you do not have a patient selected, you are prompted to choose one.

Use the Diary screen to action planned items and tasks. Planned items can range from alerts about missing data 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 are 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:

Section	Option	Use To
Add/Edit	Add	Add any of the following to patients' care records: • Code • Allergy • Consultation • Referral • Document • Data using Template • Diary Entry • Test Request • Fit note
	Edit	Edit selected tasks or diary entries.
	Complete	Complete the select diary entry. **NOTE:** 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.
	Delete	Delete selected tasks or diary entries.
	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.
Actions	Use Auto-Template	Run a template that contains the prompts required to deal with the entries in the Planned Items section (for example QOF alerts).
View	Current Items	View current items.
	Past Appointments	View past appointments.
	Completed Tasks	View completed tasks.
	Completed Test Requests	View completed test requests.
Print	Print	Print any of the following: • Selected items

		• Brief summary • Full summary • Brief summary with attachments • Full summary with attachments • User defined summary
Filter	Filters	Filter past appointments.
	Search View	Search on past appointment details.
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.

Documents Screen

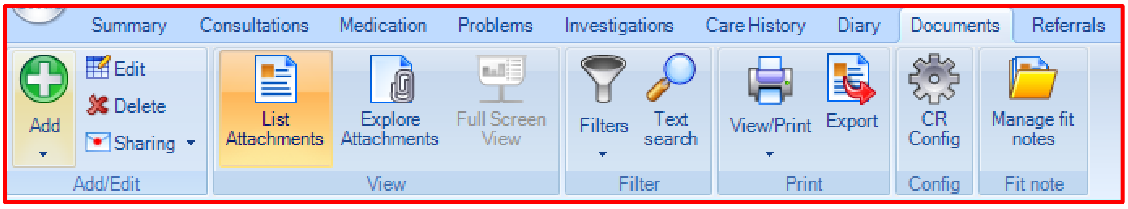
- Select the **EMIS Ball (button)** – **Care Record** – **Documents**.

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 Documents 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.

When you access Documents, a Documents ribbon is displayed.



Guide to ribbon options:

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

Section	**Option**	**Use To**
Add/Edit	Add	Add any of the following to patients' care records: • 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
	Edit	Edit documents. **Note:** Documents such as Excel spreadsheets and PDF documents open in Microsoft Excel and Adobe Reader respectively.
	Delete	Delete documents.
	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.
View	List Attachments	View a list of all attached documents.
	Explore Attachments	Preview attached documents.
	Full Screen View	View documents in full screen mode when previewing.
Filter	Filters	Apply a filter to the Documents screen.
	Search View	Search the Documents screen for text or codes. **Note:** As you start typing, only the entries with the text or code in them are displayed.
Print	View/Print	View, print or email document(s) or a document list.
	Export	Export documents.
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.
Fit note	Manage fit notes	View existing fit notes for the patient and issue a duplicate fit notes.

Referrals Screen

- Select the **EMIS Ball (button)** – **Care Record** – **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 **X** to close.

The Referrals screen consists of two sections:

- **Main (left-hand) pane:** This pane displays the following basic information about all referrals for the selected patients:
    - 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:

Section	Option	Use To
Add/Edit	Add	Add referrals.
	Edit	Edit referrals.
	Delete	Delete referrals.
	Sharing	Configure patients' data sharing preferences.
	Mark As	Change the status of referrals.
	Recall	Recall managed referrals.
NHS e-RS	NHS e-RS Portal	Access the e-Referral Service website.
Filter	Filters	Filter the Referrals screen.
	Text Search	Search for referrals.
Config	CR Config	Configure consultation styles, types and quick picks.

Tasks

You will be limited to seeing various headings, this will depend on whether you are a **Global Viewer** (**Workflow View** in Ribbon) or only viewing Tasks that have been assigned to you.

Global Viewer allows you to view and manage tasks across the whole organisation.

Tasks Module

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 related to practice management, and ***not*** related to specific patients, e.g. updated policies for staff.

To access Tasks, select the **EMIS Ball (button)** – **Workflow** – **Workflow Manager** – 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:

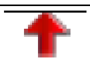
- Task categories are listed in the navigation (left-hand) pane:

Category	Section	Contains
Task Management	To-Do List	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.
	Sent Tasks	Tasks that you have sent.
Completed Tasks	Completed	Completed tasks.
	Deleted	Deleted tasks.
	Archived	Archived tasks.
Online Services	Inbox	Messages sent to your organisation using Online Services.
	Completed Messages	Completed messages.
	Deleted Messages	Deleted messages.
	Service Requests	Service Requests are requests made from online users to have access to a service that is offered by the practice, but not yet enabled for them personally. If they have messaging enabled, the service request can be made using Patient Access and the request will be received electronically into Workflow Manager.

- When you select a task category in the navigation pane, tasks in the selected category 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.

Task Icons and Indicators

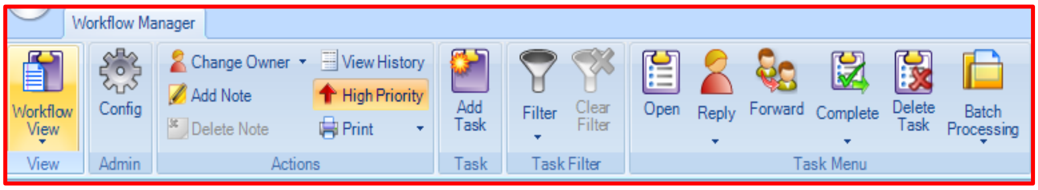
To help identify task type and manage tasks, the following indicators are used on the Tasks screen:

Icon or Indicator	Indicates
Red text in the Due Date column	Overdue tasks.
	High priority tasks (displayed at the top of the list).
	Completed sent tasks.

	Tasks generated from pathology/lab reports.
	Tasks that have been replied to.
	Tasks that have been replied to.
	Tasks that have been forwarded to another user.
	Tasks owned by a user other than the currently logged-on user. To view a tooltip showing the owner's name, hover over the icon.

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.



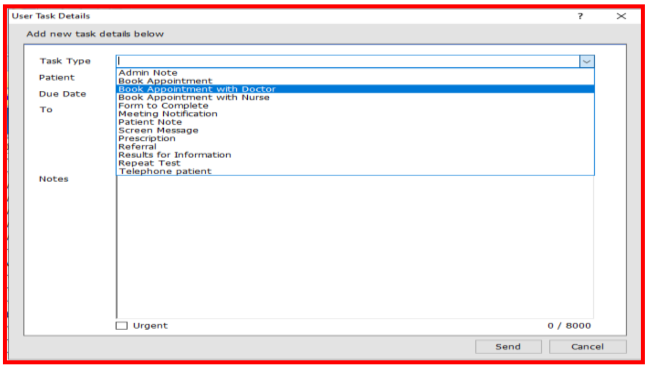
Guide to Ribbon Options Above:

Section	Option	Use To
View	Workflow View	Filter tasks by their owner.
Admin	Config	Access the Workflow Manager Configuration screen, to configure Task settings.
Actions	Change Owner	Change task owners.
	Add Note	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.
	Delete Note	Delete notes from tasks.
	View History	View the history of tasks.
	High Priority	Change the priority of tasks. A red arrow is displayed beside high priority tasks, and they are displayed at the top of the list.
	Print	Print selected tasks and/or task lists.
Task	Add Task	Add new tasks.
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 list.

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.

Adding a Patient Task

- Access Tasks.
- Click the **EMIS Ball (button)** – **Workflow** – **Workflow Manager** – **Tasks** in the navigation pane.
- On the ribbon, click **Add Task**.
- Beside the **Task Type** field, click the drop down arrow and select the required task type (e.g. Book Appointment with Doctor).



- Beside the **Patient** field, click the **down arrow** and select the current patient's name or click the **magnifying glass** and 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 the calendar and select the required date. The default is todays date.
- Beside the **To** field, click the magnifying glass and then use the Find Teams or Users screen to select the required recipient.
- 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 send to each selected recipient and displayed in their To-Do list. A separate task for each recipient is displayed in your Send Tasks list.

- A red arrow is displayed beside high priority tasks, and they are displayed at the top of the list.

Adding an Admin Task

- On the ribbon click **Add Task**.
- Beside the Task Type field on the Task Details screen, click the down arrow and select the required **task type** (**Admin Note**).
- In the **Subject** field, type the subject of the task (**Book Room**).
    - If a patient is already selected, the name of this field is displayed as “Patient” until you select a non-patient type task in the Task Type field.
- In the Due Date field, type the date by which the task is to actioned if required.
- Beside the To field, click the magnifying glass and then use the Find Teams or Users screen to select the required recipient.
- 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 send to each selected recipient and displayed in their To-Do list. A separate task for each recipient is displayed in your Send Tasks list.
        - A red arrow is displayed beside high priority tasks, and they are displayed at the top of the list.

Change the Owner of a Task

- Within the Tasks navigation pane, click the required task category.
- In the right-hand pane, click the task you want to assign to a different owner.
- On the Tasks ribbon, click **Change Owner** and then use the **Find User** screen to select the required user.
- The task is assigned to the selected user.

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 or forward a task with a note attached, the note is *not* sent with the reply.

- Within the Tasks 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 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 the 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.

Viewing the history of a task

- Within the Tasks 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.

- Within the Tasks 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 of the senders.
- **Due Date** – amend if required.
- **To** – the default is the owner(s) of the task.
- If required, select **All Recipients to Action Task**.
- In the **Notes** field, type your reply.
- If required, select **Urgent**.
- Do one of the following:
  - **Send & Complete** – this sends a reply and completes the task. The reply is send to the selected recipient(s) and the task is moved to the Completed category **OR**
  - **Send** – this sends the reply without completing the task. 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

- Within the Tasks navigation pane, click **To-Do list**.
- In the right-hand pane, click the task you want to forward to another user.
- On the ribbon, click **Forward**.
  The User Task Details screen is displayed, with some details already completed.
- **Due Date** – amend if required.
- Beside the **To** field, click the magnifying glass to select the required recipient(s).
- If required, select **All Recipients to Action Task**.
- If required in the **Notes** field, type any additional information.
- If required, select **Urgent**.

- Do one of the following:
    - **Send & Complete** – this forwards and completes the task. The task is forwarded to the selected recipient(s) and moved to the Completed category **OR**
    - **Send** – this forwards the task without completing the task. 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.

- In the navigation pane, click **To-Do list**.
- In the right-hand pane, click the task 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.

- In the navigation pane, click **To-Do list**.
- In the right-hand pane, click the task 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 Ctrl+left click to select multiple tasks.

- In the navigation pane, click one of the following:
    - Completed Tasks
    - Send 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

- In the navigation pane, click the required task category, e.g. To-Do list.
- 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 to your default printer.

Print a task list

- In the navigation pane, click the required task category, e.g. To-Do list.
- 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 and Sent Tasks.

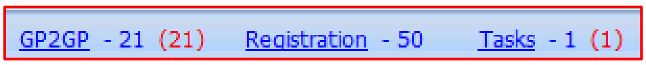
- Within the Tasks navigation pane, click one of the following:
  - To-Do List
  - Sent Tasks
- In the right-hand pane, click the required task.
- On the ribbon, click **High Priority**.
- On the Change Task Priority screen, click **Yes**.
- The priority of the task changes:
  - If the task was previously 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.
  - If the task was previously a high priority task, it changes to normal priority.

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 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, indicated priority items.
- For Lab Reports, the red number indicates tasks with abnormal results.

Click the Tasks link under the ribbon 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), then 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 that user or the administrators, EMIS Web will update the existing report rather than creating a new one.

Disclaimer

To the best of our knowledge and using the available information, this guidance is correct at the time of publishing.

Please do not hesitate to contact us if you have any queries via the IT Service Desk:
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