

HOW2 VIDEO TRANSCRIPT

EMIS Patient Précis Bar

This video looks at the EMIS Web Patient Précis Bar, the information that it contains and its functionality options.

The 'précis bar' appears below the ribbon and displays information about the active patient.

Several EMIS modules, such as all those in the care record, MUST have an 'active patient' so the précis bar will always be present on these screens.

Other sections can be viewed with or without an active patient, for example, appointments and audit trails, but as soon as you select a specific patient, for example by selecting a booked appointment slot or a patient access audit trail, you will be prompted to find a patient, and once the patient is selected, the Précis bar will be displayed.

- a. Note that the patient précis bar will be a different colour according to the status of the patient:
 - i. Blue for active patients
 - ii. Red for deceased patients
 - iii. Brown for temporary residents or private patients
 - iv. Grey for inactive patients
- b. The précis bar defaults to a 'collapsed' view which includes the following options and information:
 - i. A quick link to the 'patient find' option on the far left
 - ii. A note to tell you whether this is an active or inactive patient
 - iii. The patient's name and title
 - iv. Date of birth, age and gender
 - v. Either, depending on settings, the patient's EMIS number, or their NHS number. Notice that you can toggle between EMIS Number and NHS Number here by right-clicking on the number and selecting 'view NHS number' or 'view EMIS number'.
 - vi. The patient's usual GP is displayed here.
 - vii. If you are logged in with a Smartcard, on the right of the précis bar you'll also see a PDS status icon which shows you whether the patient's record is synchronised with PDS or not. EMIS automatically checks a patient's PDS details against PDS when a user accesses a selected number of trigger modules such as care record and registration. The icon will display in blue if the record is synchronised, and red if it isn't synchronised.

A separate video explains the process of managing the synchronisation of a patient's details with PDS
 - viii. If you see this icon (the letters CP in a red box), this indicates that there are specific child protection codes on the patient's record.
 - ix. If the child is a looked after child, this LAC icon will be displayed.

- x. If you see a padlock icon in the précis bar, this is telling you that this patient's entire record is subject to a confidentiality policy. As you are still able to view the record, that indicates that your role is assigned the confidentiality policy in place, but others in your organisation might not be permitted to view this record.

Blocking access to an entire patient record in this way might be used, for example, for a patient who also works at the practice.

- c. To open the full patient précis, either double-click anywhere on the bar, or click on double-arrow towards the left-hand side. To close the full bar display, either double-click back on the top bar of the précis or click on the double-arrow to the left.

Let's take a closer look at the full précis section. As well as the standard précis bar options this view offers:

- i. The patient's full address
 - ii. A 'household button', which, when selected will display a list of all patients who share the same address as your active patient. You can swap to a different patient from within this box.
 - iii. The map button which, when selected, will open Google maps and plot the location of the patient's address.
 - iv. 'Contact Information' will display any telephone numbers and email addresses
 - v. The patient type, NHS number and EMIS number are displayed here
 - vi. The 'warnings' section displays any warnings that already exist on the patient's record and there is also an option to 'manage warnings' which we'll now take a closer look at:
 - vii. You can use this section to add, edit or delete warnings that relate to the active patient. These warnings can be of many different types, for example to advise colleagues to be prepared for particular behaviour, or the presence of an aggressive dog at the patient's home.
 - viii. The warnings that you can create are all free text, so you can be very flexible about the content, although you may have agreed within your practice on some standard terminology for commonly used warnings.
 - ix. If you opt to 'add' a warning you will be able to add free text, and then associate that warning with one or more 'trigger points' in the EMIS system.

For example, we want this warning to appear when an appointment is booked for a patient. By default all warnings will appear for all user types within your organisation, and there is also an option to allow the warning to be viewed by other organisations, so if your practice is sharing data with other practices or services, for example an Extended Access Hub or Community Services, ticking this box will share the warning too.
 - x. Warnings can be edited or deleted.
 - xi. All current Warnings are displayed in the 'Manage Patient Warnings' table.

If a Warning is in place for a patient and you use the linked trigger action, for example in this case you book an appointment, then this is what the warning will look like. You cannot perform any other function until you acknowledge the warning.
 - xii. There are various warnings that will automatically appear if certain data items are recorded into a patient's care record, such as allergies, adverse reactions and whether the patient is a carer or has carers.
 - xiii. Before we leave the warnings section, just a reminder that, as mentioned already, warning icons relating to child protection and whether a child is 'looked after' are automatically displayed here if pre-defined codes have been added to a patient's record. And these warnings will be displayed whenever a patient's record is accessed.
- d. If the patient mentions during a consultation that have changed their mobile number, for example, you can use the 'edit patient details' button and make those changes.

Finally, right-clicking on the précis bar will enable you to:

- i. Toggle between EMIS No and NHS No
- ii. Copy patient name or other details into your clipboard for importing/copying into a document for example.
- iii. Or, clear the patient if you wish to remove the précis bar altogether so that you don't have an active patient showing at all.