

HOW2 VIDEO TRANSCRIPT

The EMIS Web Care Record – Problems

This video provides an in depth look at the 'Problems' section of the EMIS Web Care Record.

It assumes you have viewed the video 'Navigating the Care Record' which covers the options that are common across all Care Record sections, for example, Search View, Print, Knowledge Search and Manage Fit Notes, as these common elements will not be covered in this video.

The Problems section of the EMIS Care Record, like the other Care Record sections can be accessed using shortcuts from the Home Page Quick Launch Menu or the Quick Access Toolbar; via the EMIS Ball, or if already in the Care Record, it's the fourth Tab along.

Any coded entry that has been categorised as a 'Problem' is displayed on this page, grouped according to its **significance**, for example Active, Significant Past or Minor Past.

And within each of these subsections, Problems are displayed in chronological order of onset date with the most recent at the top.

A **Detailed Review** for the highlighted problem shows on the right – we'll return to look at the content of this section later in the video.

The '**Shared Data View**' section appears to the left – this is collapsed by default and we can see that there is no Shared Data for this patient.

You can drag and drop the section delineator to change the amount of screen space dedicated to each section.

When adding coded data to a patient's record using 'Add Code' you can label this code as being a 'Problem' by selecting the 'Record as a Problem' in the dialog box. Many codes will have the 'Problem' box ticked by default, as we see here.

You also have the option to define the Problem further within this dialog box for example by:

- Defining the code as Past instead of Active
- Changing its Significance
- Amending the assigned Episode label. This Episode label will differ according to whether there are already records of that code on the patient's record. In this case, there is no record of Diabetes Mellitus, so EMIS defaults the Episode status to 'First Episode'.
- And you can define how long this code should remain an Active Problem. Again – EMIS defaults to pre-configured time periods, but these can be altered by the user by selecting one of the pre-configured options, selecting Indefinitely, or creating a custom time period.

Also, any coded entry that has been added as a 'Problem' in the Consultation will be automatically labelled as being a Problem.

When an entry is selected, the right-hand Panel will open up displaying information about the selected code.

This Detailed View includes a basic summary showing:

- a. The Severity and Type of problem.
- b. The Start Date.
- c. The 'Duration' or Date for Active Problems – remember from earlier that this date governs when the code will cease to be considered an 'Active Problem' and is defined when the code is added to the patient's record.
- d. An 'End Date' or the date that the problem was last reviewed if applicable.
- e. You can also see both the Read Code and SNOMED CT Concept ID.

Below the Summary section you will see any Linkages for the selected code. Links can be made between codes and:

- Medication
- Consultations
- Documents
- Or Referrals

Links can be created from within the other relevant modules, for example, from within Medication, or Documents, but they can also be created from within the Problem section here.

Let's take a closer look at this:

To create a link to a document that is already saved on the patient's Care Record, Select 'Edit Links' in the Linked Documents section, and find and select the document or documents that you wish to link.

You would follow the same pattern to link a Referral, Medication or Consultations.

And note that you can also link medications to a selected code by using this option on the Ribbon.

The 'Add Review' link in the 'Linked Consultations' section works differently, as it immediately creates a Consultation, automatically adding the selected Problem code as the Problem within the Consultation and marking this as a 'Review' of the Problem.

If you already have Consultations displayed in the 'Linked Consultations' section, you can use the 'View all' quick link here to display a filtered view of the consultation history showing consultations that relate only to that Problem.

The red bar at the top reminds you that this is a filtered view.

From here, remember that you can use the 'Return to the previous page' option in the Quick Access Toolbar to get back to the Problems page.

Taking a closer look at the Ribbon options: as usual the options to Add, Edit and Delete are located to the left on the Ribbon, along with the option to record explicit consent, or dissent, for the sharing of the Record.

Selecting the Green Plus icon to Add data will default to the 'Add code' window.

Selecting the section below the Green Plus icon will give the standard list of options of items to add which includes items that will be stored and displayed in other sections of the Care Record, such as Referrals or Diary entries.

We will return to the 'Expand Groups' icon later.

Here, you can also look at any [previously deleted items](#) on the patient's record, including any details about why the item was deleted.

To change the status of your selected code, select 'Change Status' from the Ribbon, and pick the desired status from the drop-down list. I'll pick the Active Problem of 'Psoriasis'.

If you choose to 'End the Problem', you will be prompted for an end date. If you don't know the end date you can leave this as 'Not Known'.

If you know the month and year only, you can enter that combination.

If you know the year only, you can enter that.

You can see now that the Problem has now been moved into the appropriate 'Past Problems' section, and in the Detailed View an 'End Date' is now displayed.

Using the same process it is possible to **Reactivate a past problem**,

Change a Minor past problem to being a Significant Past Problem, or vice versa.

Change the status of an active problem between Significant and Minor.

Note that if you choose the option 'Not a Problem', you will be prompted with a warning dialog asking if you are sure you want to remove the 'Problem' marker from this code.

The code won't be deleted from the record, but it will, from that point on, be considered a standard observation and not a 'Problem' in any of the associated consultations. This warning stresses that this action can't be undone.

Going back to the Actions section of the Ribbon – let's look in more detail at the options for **Grouping, Combining and Evolving problems**.

Grouping problems might be used if the patient has a set of codes that are all linked to a key entry, for example, this patient has Crohn's disease. They also have codes for an endoscopy procedure and a hemicolectomy.

I'm going to group these codes under the code for Crohn's Disease.

To do this, select them all by holding down the 'Ctrl' key and clicking on all of them. Once they are all highlighted, click on the Group Problems icon and you will be presented with a summary of the codes that you have selected.

As directed in the dialog box, select a problem to act as the 'header' – I'm going to select the Crohn's Disease diagnosis code.

This then becomes the top level problem that is displayed in the Problems list, with an arrow to the left of it, which, if selected, will display all of the other problems grouped below it.

I mentioned earlier that we would return to the **'Expand Groups'** option in the Ribbon.

This can be used when you have 'Grouped' codes instead of selecting the arrow to the left of each Group Header Code, you can select 'Expand Groups' from the Ribbon and ALL grouped codes will be expanded.

You can then reverse this by selecting 'Collapse Groups'.

To **Ungroup** an individual grouped code, select the Header code and pick 'Ungroup' from the Ribbon. This splits the grouped code set back into individual coded entries in the record.

Combining Problems might be used, for example, if the patient's record contains several codes that have been added over time which can all actually be combined as a single code.

To do this, select all the codes you wish to combine, including the code that you intend to combine them under. In this example, I am going to select these codes, and choose 'Anxiety with Depression' as the problem that will remain on the Problem list.

I can leave the date as that associated with one of the selected codes or define a New Date.

This leaves only one code displayed in the Problem list, but the detail of the combined codes can be seen in the Detailed View.

To **Uncombine**, select the Problem code and pick 'Uncombine' from the Ribbon.

An example of when you might use '**Evolving Problems**' might be if you have symptom codes in a patient's record which were added prior to the patient being diagnosed.

In this example, we have symptoms of Breathlessness and Wheezing, and a diagnosis of COPD.

In this case, I need to select all three of these codes in order to evolve the symptoms into the diagnosis.

Once selected, I pick the COPD diagnosis code as the Problem code to remain on the record.

Details of the evolved codes are shown in the Detailed View.

To **undo** this.....select the Problem code and pick 'Undo evolution'

The remaining Ribbon options are common to most of the Care Record sections and are covered in the video 'Navigating the EMIS Care Record'.

Several of the options available in the Ribbon are also available when you Right-click on an entry in the Care Record.

Edit and Delete are available here, as well as on the ribbon.

The Replace option lets you select a code to replace the one used originally, if, for example, you realise that you could have coded something more accurately.

I'm going to Replace 'Sore Throat symptom' with 'tonsillitis'.

Once you have selected this replacement code, notice that the code that you replaced is noted both in the code list and in the Detailed View.

Returning to the Right Click menu options:

Confidentiality Policies can be applied, changed or removed from this menu – assuming your User Role includes this function. As you can see here, my role does not permit me to make these changes so this is greyed out.

Confidentiality Policies are covered in a separate video.

Change Status, Group, Combine and Evolve are also all available on the Right-click as well as in the Ribbon and 'Add Review' is available here as well as in the Detailed View.

The **Audit Trail** option in the right-click menu will open a new window displaying a full Audit Trail of the selected code. Showing you when it was first added, and all other activity such as status changes, replacements for example, along with the details of the users who performed those actions and when.

The **'Knowledge'** option here performs the same function as the 'Search' option in the Ribbon and opens Mentor Online taking you directly to information that relates to the code that is selected.

That concludes our look at the Problems section of the EMIS Web Care Record.

If you haven't seen them already, we'd recommend that amongst others you look at the videos that cover each of the other Care Record sections, as well as one dedicated to Care Record Filters.