EMIS PCS New user guide

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Every effort is made to ensure that your EMIS documentation is up to date, but our commitment to constantly improve our software and systems means that there may have been changes since this document was produced.
Associated documentation
None

Contents

1 Introduction to EMIS PCS

EMIS PCS (Primary Care System) covers all areas of practice procedure, enabling you to automate many areas of practice activity. EMIS PCS helps to streamline practice operations by providing an efficient, reliable and secure working environment.

EMIS PCS enables you to create and store comprehensive electronic patient medical records, structured according to the needs and preferences of practice staff. You have direct access to all patient details, including clinical, administrative and consultation information, which can be amended and printed as required.

Whether you are upgrading from a previous version of EMIS software, changing from a different clinical system or in the process of computerising your practice records and procedures for the first time, EMIS PCS helps you achieve an accessible and efficient computerised practice.

This guide is a supplement to EMIS on-site training and EMIS PCS Help. It is designed to act as a reminder of the topics covered during your initial EMIS training with your EMIS operations manager (OM).

This guide:

- Outlines the training and support available to help you learn the EMIS PCS system.
- Covers essentials such as logging on and off the system, system navigation and system maintenance.
- Provides an overview of the modules which make up EMIS PCS.
- Introduces EMIS PCS Help, which will help you to start using EMIS PCS for everyday tasks.

2 Training and support

This section describes the resources available to help you to use EMIS PCS.

2.1 On-site training

EMIS recommends that you nominate two members of staff who can attend all training sessions, so that they will be able to:

- Gain a complete overview of system and hardware management.
- Provide continuity of training resources within the practice.
- Act as the contact/liaison person with EMIS Support.

It is important that all practice staff know who the nominated trainers in the practice are, and that the nominated trainers pass on the training they receive to other members of staff as appropriate.

2.2 EMIS PCS Help

Context-sensitive help is available for EMIS PCS, updated regularly to reflect changes to EMIS PCS functionality.

You can access EMIS PCS Help in any of the following ways:

- By clicking the Help icon in the top right-hand corner of the EMIS PCS screen.
- By selecting Index from the Help menu at the top left-hand side of the screen.
- By pressing F1 from any area of EMIS PCS, to access help on that area.

For more information about EMIS PCS Help, see ***EMIS PCS Help*** on page 14 of this guide.

2.3 EMIS Support

If you have any software or system problems, follow the guidelines recommended by your primary care organisation (PCO) on who to contact. If the guidelines advise you to contact EMIS in the first instance, telephone EMIS Support on 0845 125 5524 or email support@e-mis.com.

For more information about contacting EMIS Support, see ***EMIS Support*** on page 39 of this guide.

2.4 EMIS website

You can find additional information and support on the EMIS website at www.emis-online.com.

2.5 Feedback

If you have any ideas about how EMIS could improve the training or resources it provides, contact EMIS Field Operations Support (FOS) on 0845 123 4455.

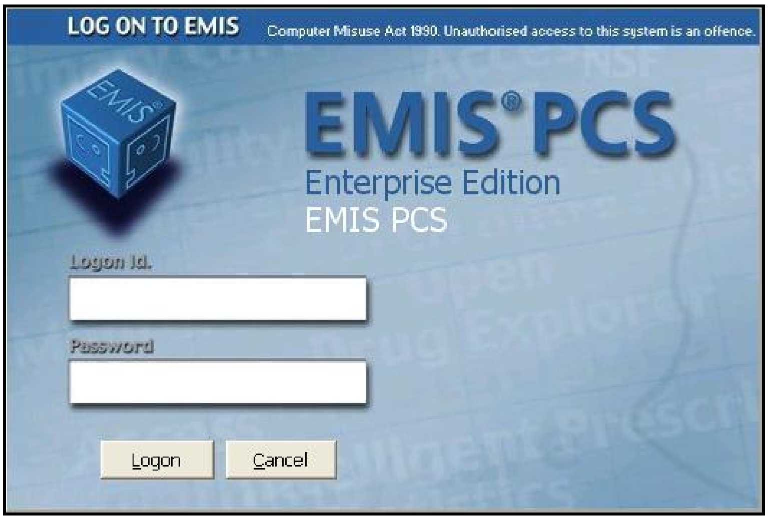
3 Logging on and off EMIS PCS

To log on to EMIS PCS you need a logon ID and a password (set up in User Manager). If you do not know your logon ID and password, contact your system administrator.

3.1 Log on

1. On your PC desktop, double-click the EMIS PCS icon.

   The Logon screen is displayed.

   EMIS PCS Logon screen

2. In the Logon ID box, type your logon ID.
3. In the Password box, type your password.

   Note: The Password and Logon fields are case sensitive. For security purposes, an asterisk is displayed instead of each character you type in these boxes.

4. Press ENTER, click Logon, or press ALT+L.

   The EMIS PCS main menu is displayed (see page 8 of this guide).

3.2 Log off

1. Do one of the following:
   - Click the close button ☒ in the top right-hand corner of the screen.
   - From the File menu at the top of the screen, select Exit.
   - Press ALT+ F4.

   A confirmation message is displayed.

2. Click Yes, or press ENTER.

4 General functionality and navigation

EMIS PCS is designed to help you navigate to and access the functions you need as quickly as possible.

4.1 EMIS PCS main menu

The EMIS PCS main menu is the first screen displayed when you log on to EMIS PCS. When you are logged on, click the Modules button or press F3 at any time to access the main menu.

Note: The main menu for your EMIS PCS system may vary slightly from the one shown below: you may have access to more or fewer system modules.

EMIS PCS main menu

On the main menu, the EMIS PCS modules are grouped into sections.

To access a module, click its name, or type the two letters displayed beside the name; for example, to access Consultation Mode, click Consultation Mode in the Medical Records section, or type CM.

Further information about the EMIS PCS sections and modules is included later in this guide.

4.2 Menu bar

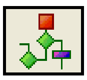
The menu bar is located at the top of the EMIS PCS window and contains the File and Help menus:

- Use the File menu to:
  - Change the current user.
  - Exit EMIS PCS.

- Use the Help menu to access:
    - EMIS PCS Help.
    - Patch information.
    - Module amendment documentation.
    - Backup information.
    - The EMIS website (EMIS Online).
    - The EMIS ECR Tracker.
    - EMIS Support status information.
    - The EMIS confirmation password.
    - Information about the version of EMIS PCS you are using.

4.3 System toolbar

The system toolbar is located below the menu bar. Use the items on the toolbar to navigate through EMIS PCS, using the following table as a guide:

Icon	Name	Use to
	Modules button	Access the main menu.
	Internet button	Access the EMIS website (EMIS Online).
	NHS (NPfIT) button	Access Connecting for Health (CFH) functionality.
	Message button	Access Screen Messaging.
	Organiser button	Access Organiser.
	Tasks/Appointments summary	Access Tasks and/or Appointments (depending on configuration in Organiser).
	Protocols button	Access Protocols.
	Patient button	Access Patient Find.
	EMIS Web button	Access PCS Web
	Help button	Access EMIS PCS Help.

Note: Click the arrow  to the right of each toolbar item to access other related options and functions.

4.4 Patient précis

The patient précis box is displayed at the right-hand side of the system toolbar. Use the patient précis to view details about the current patient.

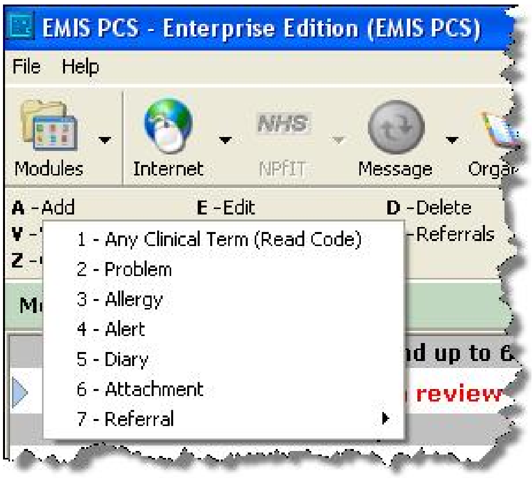
Patient précis box

4.5 Shortcut keys

You can perform most functions in EMIS PCS using either the keyboard or the mouse. Keyboard shortcuts are displayed in module menus, and indicated in menu options as an underlined character or a number or letter before the full option name.

For example, in the screenshot below:

- A is the keyboard shortcut for the Add menu option.
- The numbers 1 to 7 are the keyboard shortcuts for the items in the sub-menu.



Menus showing keyboard shortcuts

4.6 Function keys

You can use the function keys along the top of the keyboard as follows in EMIS PCS:

Function key	Key name	Use to
F1	Help	Access EMIS PCS Help.
F2	Change user	Change the current user.
F3	Main menu	Access the PCS main menu.
F4	Add data	Aid data entry; its function is module specific.
F5	Find patient	Select and change the current patient.
F6	Consultation Mode	Access Consultation Mode.
F7	Registration	Access Registration.
F8	File	Save data.

Function key	Key name	Use to
F9	Prescribing	Access Prescribing.
F10	Appointments	Access the current appointment session.
F11	Medical Record	Access the current patient’s medical record.
F12	Appointment List	Access the current appointment list.

5 EMIS PCS basics

5.1 Changing user

When you have finished using EMIS PCS or if you leave your PC unattended, you must either log off completely or change user. This is to prevent unauthorised access to EMIS PCS and to maintain the security and accuracy of information.

To change user:

1. Click File on the menu bar and select Change User, or press F2.

   The Change Current User screen is displayed.

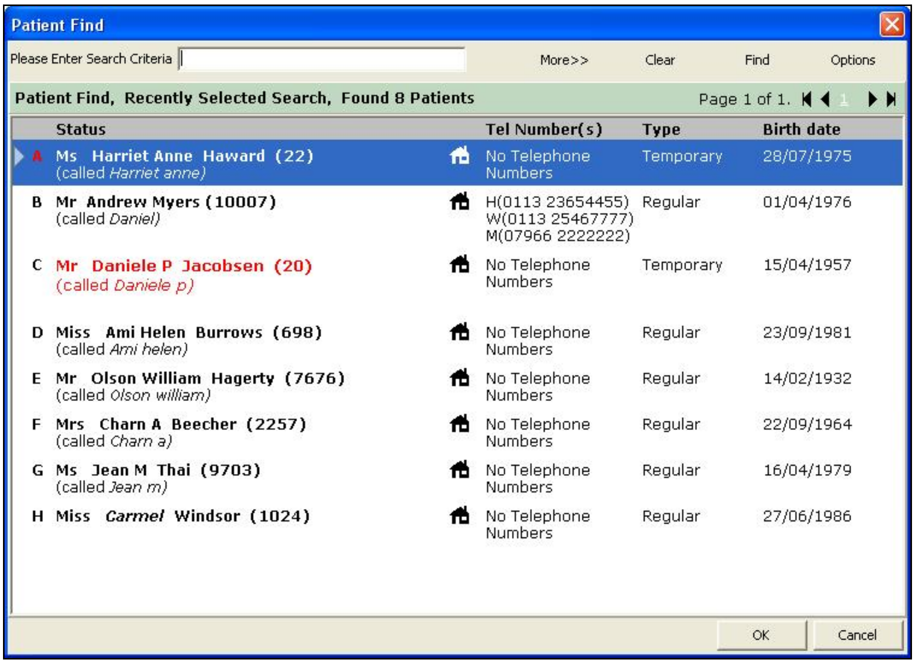
2. Type your logon ID and password.
3. Click Logon.

   You are logged on as the new user.

Important: If you are using the Change User function to prevent unauthorised access to your computer in your absence, do ***not*** continue beyond the first step of this procedure. When the Change Current User screen is displayed, you or another authorised user can only access your computer by completing the procedure (steps 2 and 3).

5.2 Finding patients

Use the Patient Find screen to search for patients.



Patient Find screen

You can use different criteria to search for a patient. You can use a patient number, patient name, address or date of birth. You can also search on partial information; for example, if you type a street name, any patient who lives on that street is found.

When you select a patient, that patient becomes the current patient, and information about that patient is displayed on any information screen you subsequently access.

You can access the Patient Find screen in any of the following ways:

- Click the Patient button  on the system toolbar.
- Press F5.
- If there is no current patient selected when you try to access certain modules, you are prompted to choose one, and you cannot proceed until you have done so.

Note: In certain circumstances, you ***cannot*** access the Patient Find screen: for example, while a consultation is active or while you are in the process of issuing a drug.

5.2.1 Search for a patient

1. Access the Patient Find screen.
2. If necessary, click Options and amend the search criteria.
3. In the Please Enter Search Criteria field, type the required search details.
4. Click Find, or press ENTER.

   The search runs and the results are displayed in the main body of the screen.
5. Double-click the required patient, or highlight the patient and click OK.

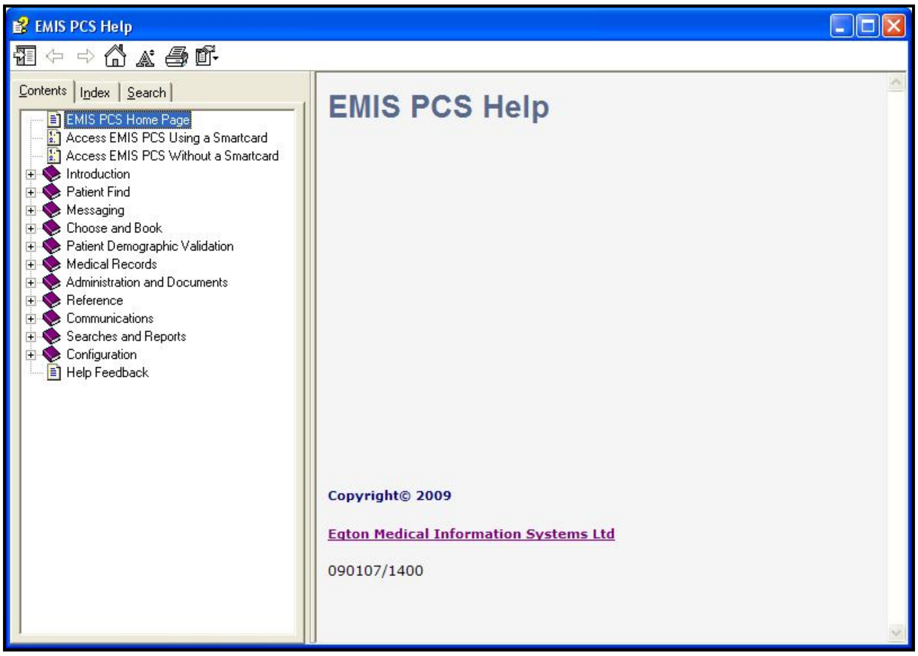
   The selected patient becomes the current patient.

6 EMIS PCS Help

EMIS PCS includes a context-sensitive help system that explains the features of EMIS PCS and guides you through its functionality.

You can access EMIS PCS Help in any of the following ways:

- Press F1 to access help about the area of EMIS PCS that you are currently using (context-sensitive help).
- Click the Help button on any EMIS PCS screen, to browse EMIS PCS Help.
- Click Help on the menu bar and select Index, to access and browse EMIS PCS Help.
- Click the arrow beside the Help button on the system toolbar and select one of the following, as required:
  - Main Index to access the EMIS PCS Help home page and the table of contents (see screenshot of EMIS PCS Help viewer below).
  - Current Module to access help on the area of EMIS PCS that you are currently using.

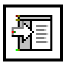
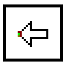
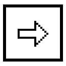


EMIS PCS Help viewer

6.1 Using EMIS PCS Help

Use the following options to navigate and use EMIS PCS Help:

- Click the Contents tab to browse through the help system. To open a 'book' and view its contents, double-click the book icon or click ⊞ beside it. To read a topic, click its title in the Contents; the topic text is then displayed in the right-hand pane. Topic types are indicated by icons:
  - Overview topics giving an introduction to a module or subject and any relevant additional information are indicated by a text icon.
  - Procedural topics giving instructions for performing particular tasks, presented as a list of numbered steps, are indicated by a numbered list icon.

- Click the Index tab, type a keyword in the text box at the top of the pane, and then click Display to view the appropriate help topic.
- Click the Search tab, and then type the word or phrase you want to find in the text box at the top of the pane. Click List Topics to display a list of all help topics containing this word, and then double-click a help topic title in the list to view the appropriate help topic.
- Click the Maximise button  in the title bar to resize the help window, or click the edge of the help window frame and drag it to the required size.
- Click Hide  or Show  on the help toolbar at the top of the help window to display or hide the Contents, Index and Search tabs.
- Click Back  to return to a topic you have previously viewed.
- Click Forward  to return to the topic displayed before you clicked Back. If you have not clicked Back to view previous topics, then Forward is not available and is greyed out.
- Click Print  to print the current topic.
- Click the arrow beside Options  to access additional browse and navigation controls and internet settings.

7 EMIS PCS sections and modules

This section provides an overview of each section of EMIS PCS and the modules it contains.

Note: The sections and modules you can access and see on the EMIS PCS main menu depend on the configuration of your system, and on your own security profile and level; for example, practice administrators have greater privileges than a normal user, and are the only users who can access certain modules.

7.1 Medical Records

The Medical Records section consists of the following modules:

- Medical Record: use to provide an overview of a patient's clinical status.
- Consultation Mode: use to gather and record information during consultations.
- Prescribing: use to issue and print prescriptions and record medication prescribed previously.
- Dispensing: use to issue prescribed drugs and manage drug stock levels (dispensing practices only).
- Unmatched Drugs: use to match unrecognised drug data transferred from a previous system.
- Code Conversion: use to convert local codes, created as the result of a data transfer, to clinical terms or EMIS allergy codes.
- Patient Documents: use to add, edit, delete, view and print Microsoft Word documents related to specific patients.
- Dental: use to maintain an accurate and secure record of all your patients' dental records, if you provide dental services at your practice.
- Import Discharge (Scotland only): use to import discharge letters from SCI Gateway.
- Import Lab Test (Scotland only): use to import, view and manage reports imported into EMIS PCS.

7.1.1 Medical Record

Use Medical Record to record and store clinical, administrative and consultation information about your patients. When new patients are registered, or records are transferred to EMIS PCS from another clinical system, a new medical record is generated.

You can add information to patients' records from within Medical Record and/or from other modules. This information includes clinical terms, template entries, free text observations, pathology reports, and attachments such as letters and scanned documents.

Access to patients' medical records is controlled by security profiles and access to the information in the records is controlled by confidentiality policies. All changes made to a medical record are recorded in the Audit Trail.

You can access Medical Record from the main menu or from other modules, depending on the procedure you are carrying out. If there is no current patient selected when you try to access Medical Record, you are prompted to select one.

7.1.2 Consultation Mode

Use Consultation Mode to:

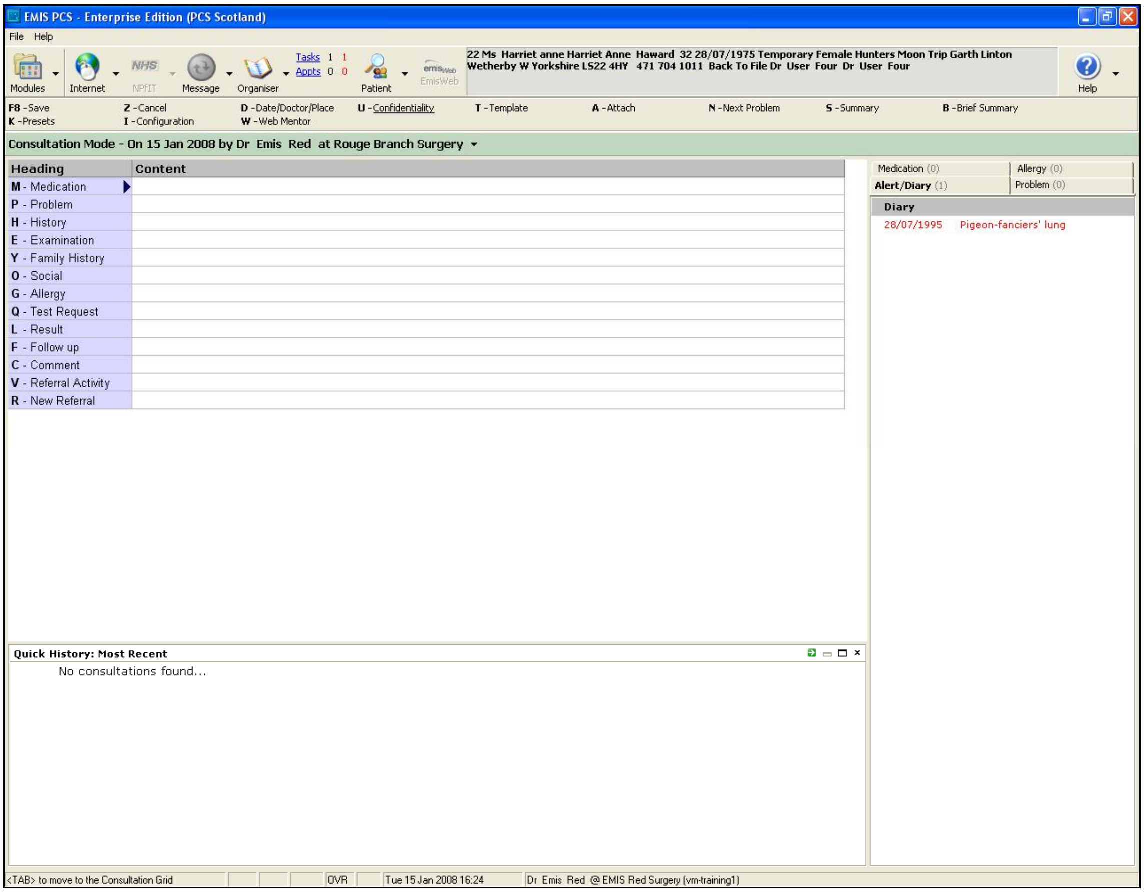
- Record information during a consultation and add it to the patient's medical record.
- Search, view or edit information from previous consultations.

Consultation Mode provides an efficient and flexible method of recording information during a consultation with a patient, and is the primary means of adding clinical information to a medical record. A full chronological history of previous consultations is also displayed in Consultation Mode.

Before using Consultation Mode, you need to configure EMIS PCS using Locations Manager, User Manager and Confidentiality Policy Manager.

You can access Consultation Mode from the main menu or from other modules, depending on the procedure you are carrying out. The access method you use determines what is displayed. For example, if you access Consultation Mode from the main menu, the main Consultation Mode screen is displayed, but if you access Consultation Mode from Medical Record, details of previous consultations are displayed.

If there is no current patient selected when you try to access Consultation Mode, you are prompted to select one.



Main Consultation Mode screen

The main Consultation Mode screen consists of three panes:

- Main pane: use the main pane to record details of a new consultation under the appropriate section heading(s).
- Quick History pane: use the Quick History pane to view details of previous consultations; the 20 most recent consultations are displayed by default. To filter the information displayed in the Quick History pane, select an item in the right-hand pane.

  Use the buttons in the top right-hand corner of the Quick History pane as follows:

  - Click to access the Consultation History screen.
  - Click to restore the Quick History pane to its usual size (after maximising or hiding).
  - Click to maximise the Quick History pane.
  - Click to hide the Quick History pane.
- Right-hand pane: the right-hand pane consists of four tabs, displaying the following information:
  - Alert/Diary: use to view any current alerts in chronological order by date added to the record, with clinical term rubric; diary entries in reverse chronological order by due date, with clinical term rubric, overdue entries in red text.
  - Problem: use to view problems in chronological order by date added to the record, with clinical term rubric.
  - Allergy: use to view adverse drug reactions and non-drug allergies, by date added to record.
  - Medication: use to view name, form, strength, dosage and last issue date of the patient's medication.

  Click the appropriate tab to view corresponding Medical Record entries for the current patient.

7.1.3 Prescribing

Use Prescribing in conjunction with the Drug Explorer and medication dictionaries for all the prescribing functions needed for the everyday running of your practice. You can:

- Issue acute or repeat medication using a number of methods.
- Assign repeat medication due dates to track necessary reviews of medication.
- Use generic only prescribing.
- Use intelligent prescribing to warn of potential interactions or contra-indications at the point of issue.

Use Prescribing to configure the layout and content of your printed prescriptions, including the stamp doctor, health authority or health board stamp and practice address. Use the drug dictionaries for other important configurations such as dosages, drug synonyms and drug formulary population.

EMIS PCS users in Scotland can prescribe using ePharmacy.

Each issue or amendment of medication is recorded in Prescribing, enabling you to view a comprehensive medication history for each patient.

7.1.4 Dispensing

Use Dispensing as a full dispensary management system, including a fully automated stock control and re-ordering facility.

Not all practices dispense to patients in the same way, so you can choose from a variety of dispensing and stock management methods. For example, you can use full batch control stock management to print endorsements on the dispensed prescription.

After the initial configuration, when stock levels are added to EMIS PCS, you can dispense medication on a priority basis and deplete your stock accordingly. If the stock level for a medication falls below a specified limit, an order can automatically be placed with a drug supplier capable of accepting electronic ordering.

Practices that want to start dispensing before their stock levels have been accurately added can use a dummy stock, which sets artificial stock levels for all medication in your drug database and thereby enables you to dispense any item. As stock levels are accurately recorded, you can remove the dummy stock.

7.1.5 Unmatched Drugs

Use Unmatched Drugs to match details of drug issues, drugs or dosages from your previous clinical system to equivalent details in the EMIS drug database.

You can:

- Match an unmatched drug to medication from the database to update the relevant prescribing records.
- View a detailed review of the drug, to see which patient records will be updated.

Note: It is not critical to match unmatched drugs immediately, but it is good practice to ensure there are no unmatched items outstanding for a patient when they attend the practice.

7.1.6 Code Conversion

Use Code Conversion to convert local codes, created as the result of a data transfer, to any of the following:

- Clinical terms.
- EMIS allergy codes.
- EMIS drug allergy codes.

You can also batch-convert medical record entries from one clinical term to another. All conversions are fully audited.

Note: All code conversions are run overnight.

7.1.7 Patient Documents

Use Patient Documents to add, edit, delete, view and print Microsoft Word documents related to specific patients. (Use Word Configuration to create templates on which to base your documents.)

7.1.8 Dental

Use Dental to maintain an accurate and secure record of all your patients' dental records, if you provide dental services at your practice.

Dental consists of:

- Dental Records: use to record and store clinical, administrative and consultation information about your patients.
- Read Only Mode: use to view a read-only copy of a patient's record.
- Lab Work Mode: use to add new lab work, edit existing lab work and edit laboratories.
- Billing Module: use to manage your patient accounts and billing to third party companies and insurance schemes.
- Note: This option is currently under development.
- Dental Alerts: use to add dental alerts to the system.

7.1.9 Import Discharge (Scotland only)

Use Import Discharge to import discharge letters from SCI Gateway into EMIS PCS.

7.1.10 Import Lab Test (Scotland only)

Use Import Lab Test to import, view and manage:

- Pathology reports from SCI Store.
- Cytology messages from the Scottish Cytology Call Recall System (SCCRS).
- Diabetes-related information from the Scottish Care Information Diabetes Collaboration (SCI-DC).

7.2 Administration and Documents

The Administration and Documents section consists of the following modules:

- Registration: use to record patient registration details and manage registration information.
- Appointment Book: use to record and book appointments.
- Admin Lists: use to manage waiting lists and referrals.
- Tasks: use to manage your own workload.
- Attachments and Capture: use to attach scanned documents to patient records.
- Practice Documents: use to create and store Microsoft Word documents related to the whole practice.
- Word Configuration: use to create templates for letters, reports and other documents (link to Microsoft Word).
- Organiser: use to view important information such as tasks, appointments and test results on one screen.
- Palm GP: use to access, configure and use EMIS PCS functionality with a handheld device.

7.2.1 Registration

Use Registration to:

- Record patient registration details and manage registration information.
- Generate notification to the relevant trading partner (TP) when a patient is registered.
- Record a registration status for each patient, reflecting the point the patient has reached in the registration process.
- Record all changes to the registration status, providing a detailed status history.

Each patient is registered according to a registration type, with a slightly different registration form for each type. You can also create your own registration types, including 'dummy' patients for training purposes.

7.2.2 Appointment Book

Use Appointment Book to book appointments and manage the flow of patients through the practice.

By default, Appointment Book uses weekly view, showing a list of sessions for each day and the number of free, regular, urgent and blocked slots for each session. Other view options are also available. You can check the appointment book for free appointment slots and search for the earliest available appointment within the next seven days, a specific session holder or an appointment type.

You can print a copy of the appointment book or save it to disk, so that you can continue working if your PC fails.

You can record patient flow to check the status of all appointment slots. When patients arrive at the practice, you can record their time of arrival, entry into the consulting room and time of leaving. You can also record if a patient walks out before attending their consultation. You can then use this data to monitor waiting and consulting times and also patients who did not attend (DNAs).

If your practice has an LED patient call display, you can control the settings and messages that link to the appointment book.

Use Appointment Configuration in the Configuration section to configure the Appointment Book.

7.2.3 Admin Lists

Use Admin Lists to manage all inward referrals made by practice GPs, manage episodes of care, make appointments and configure prompts for sending letters.

The list of referrals displayed when you access Admin Lists depends on your user role and the speciality team that role is linked to. This improves confidentiality and saves time, as the lists are compact and only display information relevant to a particular team.

The Admin Lists filter enables you to view all referrals associated with your speciality, including referrals that are not on your team's caseload. Admin Lists consists of the following main sections.

- Referral Discussion: lists referred patients in order of priority. Emergency referrals are listed at the top, descending to the lowest priority referrals.

  Only patients referred and awaiting a decision are listed here. If the referral is accepted, the patient is removed from this list and added to the caseload list. When a referral is rejected, the patient is removed from the list.

- Caseload List: lists all patients whose referrals have been accepted and are waiting for treatment.
- Patient Episodes: lists all episodes of care. When a referral is accepted and the patient is added to the caseload list, you can add episodes for that patient.

  A patient can have more than one episode at any one time for a particular team and for several teams throughout the primary care organisation. An episode is the full period of care for a particular condition. For example, a patient with asthma, would have an ongoing episode, but within this period they could have another episode for postnatal depression. The postnatal depression episode is added as a separate episode and ended when appropriate, while the asthma episode is still ongoing.
- Appointment Views: enables you to view and filter your appointments.
- Configuration: use to configure Admin Lists, including speciality management, document locations and the configuration of urgency scores and waiting list duration defaults.

Note: You can rename each section to reflect its use with a particular speciality, but the functionality remains unchanged.

7.2.4 Tasks

Use Tasks to distribute workloads electronically. Every user has an individual task list, similar to a ‘to do’ list. A task can be anything from an assigned piece of work to a lab result that needs examining.

When you create a new task, you can select the appropriate task type, attach a completion deadline and specify the urgency of the task, if required. You can send tasks to individual users or groups of staff.

To remove a task from your list, mark it as complete or forward it to another member of staff. You can also choose to maintain a completed task, thus keeping it on your task list.

You can add, amend or remove task types, which describe the reason for the task, and configure them to only appear in certain situations. You can also personalise the default settings for creating a task.

An Out of Office option is available, to inform people who send you tasks while you are away that you cannot complete the task immediately.

Tasks consists of the following categories:

- Administration Tasks: generated in Tasks and not related to a specific patient. Use these tasks for general administration duties.
- Patient Tasks: generated in Tasks and related to a specific patient; for example, you can send a task to the practice nurse requesting a vaccination for a patient.
- Pathology Tasks: generated in Pathology Links to indicate that a lab result has been filed in the Pathology Links inbox.
- Referral Tasks: generated in the Referral section of Medical Record to indicate that there are outstanding referrals for a patient.

7.2.5 Attachments and Capture

Attachments and Capture enables you to attach documents to patients’ electronic medical records. When documents are attached to records, you can view or delete them as necessary.

There are two ways to attach a document to a medical record:

- Attach existing files (for example images, photographs, word processing documents, pathology reports or spreadsheets) to medical records.
- Scan paper documents, and then attach them to medical records.

7.2.6 Practice Documents

Use Practice Documents to create and store Microsoft Word documents related to the whole practice. (Use Word Configuration to create templates on which to base your documents.)

Documents are displayed on the Practice Documents screen, stored in folders in expandable-collapsible tree format. One main default folder is supplied, but you can create new folders as required, to suit your practice needs.

7.2.7 Word Configuration

Use Word Configuration to create and manage templates for Microsoft Word documents.

Word Configuration creates a link between Microsoft Word and EMIS PCS, giving added practice-specific functionality to Microsoft Word. The extra options provide the tools required to create letters and documents for use in your practice.

Available templates are displayed on the Word Configuration screen, stored in folders in expandable-collapsible tree format. Default folders are supplied, but you can create new folders, if required.

When you create a new template, you can add fields from the Fields List, such as registration details, appointment details and referral details. When you merge the template with a specific patient or search population, the patient details are merged with the document.

Use Patient Documents and/or Practice Documents to create documents from the templates you create in Word Configuration and attach them to patients' medical records.

7.2.8 Organiser

Use Organiser to view important information such as tasks, appointments and test results on one screen.

When you access Organiser for the first time, the screen is blank: you need to configure the modules that you want to be displayed. When you have done this, you can:

- View a summary of module information; each piece of information is linked to the relevant section of the module, using a hyperlink.
- Access modules displayed in Organiser directly.
- Set Organiser as your start page.

Note: Organiser configuration is user specific: any configuration you carry out does ***not*** affect other users.

7.2.9 Palm GP

Use Palm GP to access, configure and use EMIS PCS functionality with a handheld device. For more information, see the EMIS website: http://www.emis-online.com/products/palmgp/.

7.3 Reference

The Reference section consists of the following modules:

- Drug Explorer: an electronic version of the current British National Formulary (BNF) and the EMIS drug database
- Mentor on the Web (previously referred to as Web Mentor Library): an online version of Mentor Library, the clinical reference and diagnostic support system.
- PDP Note: use to access the Reflective Diary section of your personal development plan (PDP).
- Internet: use to access the common room area of the EMIS website (www.emis-online.com).
- EMIS ECR Tracker: use to access the EMIS ECR Tracker, which you can use to search for, monitor, update and manage problems or faults that you report to EMIS Support.

7.3.1 Drug Explorer

The Drug Explorer provides quick access to a wide range of information regarding drugs and drug groups, such as treatments, preparation details and possible interactions between drugs.

The information is structured to reflect the layout of the BNF. The Drug Explorer uses the same chapter structure as the printed BNF, enabling you to easily navigate to the required information. Within the relevant chapters, you will also find information on drugs that are in the EMIS drug database but not in the BNF; these are clearly indicated by the EMIS Preparations icon .

You can access the Drug Explorer whilst recording a consultation, allowing you to check a particular drug before making a diagnosis; press ALT + TAB to switch between the two screens.

The left-hand pane of the Drug Explorer enables you to browse or search for drug information and interactions. The Favourites and History options also give you quick access to common or recently viewed information. The right-hand pane displays the drug information that you have selected using one of these methods.

Refer to the first three BNF chapters displayed in the Contents pane for an explanation of how the drug information is presented and how it should be applied.

7.3.2 Mentor on the Web

Mentor on the Web (previously referred to as Web Mentor Library) is an online version of Mentor Library, the clinical reference and diagnostic support system.

It contains a wide range of information from medical publications and is regularly updated, so that GPs and other healthcare professionals have access to all the latest medical research information.

Mentor on the Web is available by subscription to users of any clinical system, but for EMIS PCS users, Mentor on the Web is also integrated into EMIS PCS.

Mentor on the Web enables users to set up personal preferences and personal development plans (PDPs). It contains extensive resources and sophisticated searches, and is updated centrally by EMIS Knowledge Based Systems (KBS) without the need for patching.

To use Mentor on the Web, you need to create an account; you are prompted to do this when you access Mentor on the Web from EMIS PCS for the first time.

7.3.3 PDP Note

Use PDP Note to access the Reflective Diary section of your PDP.

Note: To use PDP Note, you must be registered to use Mentor on the Web. For further information, refer to Mentor on the Web's own help.

7.3.4 EMIS ECR Tracker

Use EMIS ECR Tracker to access the EMIS ECR Tracker, which you can use to search for, monitor, update and manage problems or faults that you report to EMIS Support.

An EMIS call reference number (ECR) is a unique reference for any problem or fault you report to EMIS Support. EMIS Support assigns an ECR number to each problem reported.

Note: You can also access the ECR Tracker by clicking Help on the menu bar and selecting EMIS ECR Tracker.

The ECR Tracker screen consists of the following sections:

- Navigation (left-hand) pane: contains options for viewing ECRs, searching for specific information, tracking ECRs and viewing support information.
- ECR Summary Details (top right-hand) pane: lists all ECRs reported by a practice, based on their status. When you select a status in the navigation pane, ECRs with that status are listed in the ECR Summary Details pane.
- Selected ECR Details (bottom right-hand) pane: when you select an ECR in the ECR Summary Details pane, the details of the selected ECR are displayed in this pane. Each entry in this pane represents an update to the ECR details.

7.4 Communications

The Communications section consists of the following modules:

- Pathology Links: use to view and file pathology reports received from laboratories.
- GP Links: use to transfer information between the practice and the trading partner (TP).
- Items of Service: use to send information to the TP about medical procedures for which the practice can claim payment.
- Transmission History: use to view information about communication between your practice and other locations, such as trading partners and pathology laboratories.
- QMAS Uploads: use to extract information from Population Manager to send to QMAS.
- EMIS Access: use to provide services from your practice to patients over the internet.

7.4.1 Pathology Links

Use Pathology Links to:

- Receive and view test results.
- File test results in patients' medical records.

Test result reports are collected daily, when your practice dials into its mailbox. Each report contains the details and results of one or more tests. Each report is matched to a patient and to the user who originally requested the test. If this is not possible, the reports must be matched manually in the Management section. Matched reports are displayed in the original requestor's inbox, ready to be filed in Medical Record.

7.4.2 GP Links

Use GP Links to transfer information between your practice and your TP, to ensure that the practice and TP patient databases match.

GP Links uses the N3 network. Each practice and TP has its own mailbox, configured in the Communications Settings section of Locations Manager.

When new patients are registered or patient details are amended, the information is stored for transmission to the TP. Similarly, the TP uses GP Links to send information to your practice about patients on your practice list. Information is usually transmitted to and from the TP once a day. Use Scheduler to specify the frequency and time(s) of transmissions. On receipt of information, the TP database is updated and an appropriate response is sent to your mailbox.

GP Links consists of three sections:

- Inbox: This contains all incoming transactions from the TP.
- Outbox: This contains all transactions waiting to be sent to the TP.
- Records Box: This contains details of:
  - The status of your practice's FP22s (TP recall of a patient's medical record).
  - Patients registered with your practice for which records have not yet been received.
  - Records sent to the TP but not yet acknowledged.

7.4.3 Items of Service (IOS)

Use IOS to exchange information between your practice and your TP on procedures for which you can claim payment.

You can make claims within IOS or, when prompted to do so, in other modules when you add a clinical term linked to an IOS claim. Claims are sent to the TP every day. At the same time, transactions that the TP has sent to your practice are collected and matched to the original claims held in the IOS outbox.

Each IOS claim goes through several stages of processing, so at any one time there can be a number of claims at different stages of processing on the system.

All transactions processed, edited and deleted within IOS are logged in the system audit trail. IOS consists of two sections:

- Inbox: This contains all incoming transactions from the TP, including transactions relating to claims made by the practice and notification of cut-off dates.
- Outbox: This contains transactions to be sent to the TP.

7.4.4 Transmission History

Use Transmission History to view information about communication between your practice and other locations such as TPs and pathology laboratories. (Use the Mailbox Details section of Locations Manager to configure communications links.)

Note: Some configuration options within Transmission History are for EMIS Support and trainer use only, and can only be accessed using the appropriate support mnemonics and password.

7.4.5 QMAS Uploads

QMAS (Quality Management and Analysis System) Uploads is the EMIS QMAS interpreter, used to extract information from Population Manager. It is based on the national specifications developed by NHS Connecting for Health (CFH).

The information that is extracted is sent every month to QMAS, and payments are made to each practice, based on this information. You can also extract data and send reports to QMAS on an ad hoc basis. QMAS Uploads runs from April to April and initially includes 12 queued reports.

7.4.6 EMIS Access

EMIS Access provides services from your practice to patients over the internet. Patients can use EMIS Access from a PC or from any other device that they use to access the internet, for example a mobile phone. Certain EMIS Access functions, such as appointment booking, are also available via digital television.

EMIS Access is fully integrated into your clinical system and is intended to reduce the practice workload and improve service to patients.

EMIS looks after the internet aspect of EMIS Access, and no practice action is needed in this area.

Currently, only the Appointment Booking feature is available, but new features will be added to EMIS Access in the future.

7.5 Searches and Reports

The Searches and Reports section consists of the following modules:

- Searches and Reports: use to search patient data to compile statistics and produce reports.
- Audit Trail: use to monitor and create reports on clinical and system activity.
- Population Manager: use to manage practice populations against the levels of care stipulated in the nGMS Contract.

7.5.1 Searches and Reports

All staff members, particularly those responsible for making GMS pay claims, can use Searches and Reports to collate statistics and create reports for the practice.

You can define your own searches or run pre-defined audits, for example, cytology targets.

Searches and Reports consists of the following sections:

- Search Populations:
  - Search Population Manager: use to create new search populations, view existing search populations, re-run existing searches, browse patients listed in a search, view summaries and merge reports.
  - Batch Processing: use to add information to several patients' records at the same time.
  - Appointment Slots, where you can perform searches relating to appointments.

- Target Audits: use to generate a quarterly report for GMS payments, for each health authority and for the whole practice or for individual principals. There are three payment audits:
  - Cytology Targets
  - 2 Year Old Immunisation
  - 5 Year Old Immunisation
- Statistics:
  - Age/Sex registers
  - Vaccine report FP34D
  - Consultation Figures

7.5.2 Audit Trail

Warning: For legal reasons, the data contained in the audit trail ***cannot*** be edited or modified by any staff at your practice or at EMIS.

Use Audit Trail to monitor all system transactions, such as clinical entries, clinical term updates or access times for each user.

There are two types of audit trail:

- System audit trail
- Patient audit trail

You can also run a full audit trail, which combines both the system and the patient audit trail details. You can print or save the information compiled in the Audit Trail.

7.5.3 Population Manager

Population Manager primarily enables you to manage your practice populations against the levels of care stipulated in the nGMS Contract.

There are a number of different types of searches, stored in the following folders:

- GP Contract: contains the searches that measure your practice's performance for the disease categories stipulated in the nGMS Contract. The searches are further categorised into clinical indicators, organisational indicators and additional indicators. These searches are run each night and exported to QMAS, via the QMAS Uploads module, on a monthly or ad hoc basis. When the results are exported, you can log on to the QMAS website to view the progress and financial value of your points total.
- EMIS Immunisation Searches: contains searches that cover the directed enhanced services (DES) requirements of the nGMS Contract.
- EMIS Clinical Utilities: contains searches that enable you to carry out drug and diabetic monitoring at your practice. These results are not points based (i.e. not directly related to the nGMS Contract), but you can view them in the same way as you view the nGMS Contract search results.
- EMIS Administrative Utilities: contains searches that enable you to carry out cytology monitoring at your practice. These results are not points based (i.e. not directly related to the nGMS Contract), but you can view them in the same way as you view the nGMS Contract search results.

- Quality and Outcomes Assessor Pilot Populations: forms part of the QOF Assessor Toolkit. This folder is not designed for use by practice users and will not interfere with the day-to-day operation of the practice; QOF assessors will use it to support the verification of patient records when they visit your practice.

Each folder contains the relevant searches, results and, if applicable, target and points statistics. The folder for the nGMS Contract-based searches (i.e. the GP Contract folder) also contains the required parent searches (denominator searches).

7.6 Configuration

Note: Only a few members of staff, usually the system administrator and the practice manager, need to access most of the modules in this section. Contact your system administrator before accessing any of these modules.

The Configuration section consists of the following modules:

- Appointment Configuration: use to configure the appearance and content of the Appointment Book.
- User Manager: use to record details (including passwords) of all practice staff.
- Locations Manager: use to configure communication contacts with external organisations and within the practice.
- Security Profiles: use to specify user access to areas of EMIS PCS.
- Speciality Manager: use to configure EMIS PCS for speciality users.
- Confidentiality Policy Manager: use to specify staff access to patient records.
- Dictionaries: use to create practice drug formularies and to automate the creation of diary entries.
- Template Designer: use to create and edit templates.
- Patient Archive: use to record details of patients deducted from the practice list.
- Anti Virus Management: use to monitor the virus protection installed on each EMIS PCS client PC.
- Protocol Manager: use to manage clinical protocols and nGMS protocol alerts.
- Protocol Designer: use to create new clinical protocols.

7.6.1 Appointment Configuration

Authorised staff members can use Appointment Configuration to configure the Appointment Book. You can structure appointment sessions according to the needs and preferences of all staff members, at any site within the practice, taking into account staff holidays and events affecting the appointment book. To help you create and edit appointment sessions, wizards prompt you for the required information.

Use Appointment Configuration to configure:

- Session holders
- Practice events
- Appointment schedules
- Appointment messaging

7.6.2 User Manager

Use User Manager to create and maintain a file of staff members and healthcare professionals associated with the practice. Each user has a user record, including a unique login name and password, which gives the user access to EMIS PCS. The user record also contains other details, such as local GP codes, contract start and end dates and user roles. If a user does not have a record in the staff file, they cannot access EMIS PCS.

System administrators are the only users permitted to make amendments to the staff file; they have access to all user details and passwords. They are the only users who can add or delete users and user types, or add more system administrators to EMIS PCS.

User Manager consists of the following sections:

- User Details: use to maintain the staff file.
- User Types: use to maintain a list of user types. A user type is one of the required details in a user record. The details required to complete a user record depend on the selected user type.
- Practice Carers: use to maintain a list of practice carers who are responsible for patients on your practice list. Carers are not employed by the practice, but their contact details are kept on record so that you can contact them at any time to discuss a patient's needs.
- User Roles: use to maintain a list of user roles. User roles are required because different users associated with your practice need different types of access. For example, community staff are likely to need access to patients on other practice lists in your area; a user role can grant access, from one central point, to other patient lists.
- Restricted Patient Access: use to restrict access to specific patients' medical records to specific members of staff. For example, members of staff who are also patients at the practice would not want their records to be viewed by all members of staff.

7.6.3 Locations Manager

Use Locations Manager to manage your practice's list of locations and location types. Locations are required throughout EMIS PCS to specify where medical care is undertaken or patient-related information is held. Locations are categorised by location types, such as hospitals, health authorities, clinics and consulting rooms.

Locations are required when recording consultations (place of procedure), registering patients (trading partner) and making referrals (provider unit). If you are an EMIS Version 5 ex-user, locations have replaced the role of associated features.

Locations Manager consists of the following sections:

- Local Locations: use to maintain a list of locations configured for use in your practice. The list consists of locations you have created and locations you have selected from national lists.

  The Local Locations screen also includes the following sections:

  - Practice Settings: use to set default practice details that are used in the communications modules.
  - Manage Terminals: use to allocate PCs on your system to a particular room or building in your practice.

- Location Types: use to maintain a list of different location types, for example, Health Authority, Laboratory and Trading Partner. The list consists of default location types and types you have created yourself. Location types are used to create local locations.

7.6.4 Security Profiles

Important: Only system administrators can access Security Profiles.

Use Security Profiles to control each user's access to different areas of EMIS PCS.

A profile determines the areas a user can and cannot access when logged on to EMIS PCS. You can also restrict access to key functions within an area, so that users can have access to an area of EMIS PCS but be prevented from performing certain functions within it.

Different roles within a practice require different access rights to EMIS PCS: for example, a doctor may need access to all areas of EMIS PCS, whereas a receptionist may only need to access a few areas in order to do their job.

The system administrator is responsible for maintaining security profiles. This includes adding new profiles, assigning users to or removing users from a profile, and deleting redundant profiles.

Security Profiles itself and User Manager are ***not*** configurable from a profile: only system administrators can access these modules.

Security Profiles consists of the following sections:

- Configure Profiles: use to create, edit and delete profiles.
- User Assignments: use to add or remove users from a profile.
- Profile Assignments: use to add or remove profiles from a user.

7.6.5 Speciality Manager

System administrators use Speciality Manager to link user roles to specialities.

Speciality teams are formed on the basis of user roles. These teams are associated with a speciality and linked to a referral code. Team members can then use Admin Lists to manage any referrals made to the team.

When a new user is assigned a user role in User Manager, they are also added to any associated speciality teams. You can also add appropriate external users to these teams, for example secondary care providers.

The primary care organisation (PCO) initially configures the specialities and their associated referral codes. Only the PCO can add or remove these specialities, but your practice can change the default referral codes.

7.6.6 Confidentiality Policy Manager

Use Confidentiality Policy Manager to maintain confidentiality between a patient and their GP or healthcare professional (HCP). All information recorded as a result of a patient encounter should only be accessible to these people and to anyone else to whom the patient has also given explicit consent.

By using confidentiality policies for filing and viewing information in a medical record, you can mask the information from unauthorised users. Each user has a default filing policy when adding information to the medical record, and only users also allocated to the same policy can view this information.

A medical record could potentially contain many coded entries, filed under many different confidentiality policies, and the information that each user can view will depend on the policies they use. In an emergency, you can override all policies and have full access to all entries in a medical record. In this case, users who have filed information that has been unmasked are informed that someone has overridden the confidentiality policy.

To get your practice started using confidentiality policies, two policies are supplied with your system: a policy for doctors and a policy for all staff members. To edit the user allocation of each policy, you can allocate users either by user role or on an individual basis.

7.6.7 Dictionaries

Note: Only system administrators should access Dictionaries, as these settings affect the whole practice. After all the options have been configured, you should not need to access them very often.

Use Dictionaries to set up a collection of dictionaries used throughout EMIS PCS.

Dictionaries consists of the following sections:

- Medication Options:
  - Formulary Manager: use to manage your preferred display and aid prescribing choices, for example you may want to create a formulary for practice nurses or a formulary that contains items recommended by your primary care organisation (PCO).
  - Drug Dosage Maintenance: use to manage the links between dose abbreviations, full dose descriptions and the drug form, for example the link between 1d, One Daily and tablets.
  - Practice Synonyms List: use to maintain a list of practice synonyms for drugs used in Prescribing, for example, you could create a practice synonym for common cold and then a selection of drugs used to treat the common cold.
  - Drug Prescribing Status: use to manage the prescribing status of the items in your drug database.
  - Contra-indications: use to manage your practice-created contra-indications for patients of a specific age or sex, or who have specific clinical terms in their medical record.
  - Maximum Daily Quantity: use to maintain the maximum daily usage assigned to each drug. If the dosage prescribed contains a daily usage that exceeds the one specified, a warning is triggered.
  - Expire Repeat Medications: use to expire any repeat medication issued to any patient before a specified date.
  - Automatic Prescription Issue: use to select and print prescriptions automatically, at intervals determined by the practice.
  - Prescription Print Recovery: use to recover lost or damaged prescriptions (for example, if a printer jams or runs out of paper) without reprinting or reissuing.
  - Prescription Print Audit: use to check details of prescriptions printed.

- Schedules:
  - Recall Schedules: use to automate the creation and deletion of patient diary entries, prompting practice staff to make follow-up appointments at the correct time. For example, you could create a recall schedule for child vaccinations.

7.6.8 Template Designer

Use Template Designer to create and maintain templates to speed up data entry in Medical Record. Use templates throughout your practice to ensure consistent data entry and accurate search and audit results.

EMIS PCS is installed with a number of pre-defined templates related to common situations, for example health checks, cervical smears and asthma monitoring. A full range of templates for the nGMS Contract is included, containing some of the recommended clinical terms specified by the British Medical Association (BMA).

You can also create your own templates, either using a wizard or by placing components onto a template form manually. A template can contain clinical terms, picking lists, links to patient information leaflets (PILs) and diary entries. These are presented as prompts, ensuring that the right questions are asked during a consultation. The data entered in response to these questions is added to the patient's medical record. There is no limit to the number of prompts that you can add to a template.

You can share templates between practices by exporting them to disk or onto a network and then importing them to other EMIS PCS systems.

7.6.9 Patient Archive

Use Patient Archive to perform the 'housekeeping' needed to keep your patient list up to date. You can archive the medical records of patients who have been deducted from your patient list (using GP Links). Archived patients are ***not*** included in any patient search results.

Patient Archive consists of the following sections:

- Deducted Patients: use to archive deducted patient medical records from your patient list.
- Archived Patients: use to view a list of patients whose medical records have been archived and, if necessary, to reactivate the records if the patient is re-registered on your patient list.

7.6.10 Anti Virus Management

Use Anti Virus Management to monitor the virus protection installed on each EMIS PCS client PC.

To ensure the whole system is safeguarded against the latest viruses, the antivirus software on each PC must be updated regularly. EMIS patches each update to the practice server and distributes it from the server to each of the client PCs; this is usually configured to occur automatically, but you can process it manually if required (see your antivirus software manufacturer's documentation for more details).

Anti Virus Management displays the latest AV DAT on the server, and the latest AV DAT installed on each PC on your network. The latest server DAT is displayed at the top of the Active Terminals screen and the PC details are colour-coded to give you an overview at a glance. EMIS recommends that all client PCs are kept up to date: PCs running the same AV DAT as the server (or within two versions of the server's DAT) are deemed to be up to date.

7.6.11 Protocol Manager

Use Protocol Manager to manage the following:

- Clinical protocols: use clinical protocols to automate many of your decision making processes (for example, to check whether a patient been taking a certain medication within the last six months), and then perform specified actions based on the outcome (for example, create a diary entry for a medication review). Use Protocol Designer to create new protocols.
- nGMS protocol alerts: use to configure alert protocols, which look for certain clinical terms in a patient's record (for example, terms required for the nGMS Contract) and, if those clinical terms are missing, display an alert.

  You ***cannot*** edit the contents of the alert protocols, but you can configure when the alerts are displayed for each type of user; for example, administrative user types can only view the alerts when they access Medical Record.

7.6.12 Protocol Designer

Use Protocol Designer to create new clinical protocols, to automate many of your decision-making processes.

A protocol contains a series of decisions and actions; for example, if a patient has been taking a certain medication within the last six months (the decision), a diary entry is created for a specific date, to review the medication (the action). The system can calculate the outcome of the decision automatically or the protocol can prompt you to select an answer.

You can add extra complexity to your decisions by adding extra criteria: for example, if a patient has been taking a certain medication within the last six months (first criterion) and if a patient is allergic to a certain medication (second criterion).

There are a number of ways that you can use a protocol to record information; for example, you can:

- Add coded entries, medication, referrals or diary entries.
- Mail-merge word processing documents.
- Run other templates.

You can run a protocol from anywhere in the system by selecting it from the Protocols button on the system toolbar, but by running the protocol from Consultation Mode, you can record the protocol information in the relevant consultation sections. You can also link a protocol to a particular clinical term, so you are prompted to run the protocol if you select the clinical term.

8 Backups

If your practice is using the EMIS PCS Enterprise edition, backups are carried out centrally, but if your practice is using the EMIS PCS LAN edition, you need to carry out your own backups. System failures are very rare, but regular backups ensure that EMIS PCS can be restored in the event of a system failure.

8.1 Backup guidelines

For successful backups, EMIS recommends that you use the following guidelines.

8.1.1 Allocate backup responsibility

Nominate a member of staff (and a deputy in their absence) to be responsible for changing and storing the backup tapes. This will prevent any confusion over whether tapes have been changed, and promote an efficient backup procedure. Develop a practice policy for managing backup failures.

8.1.2 Use a daily backup log

Create a daily paper backup log to keep an accurate record of all performed backups and their outcome. Use the daily backup log to monitor potential problems; for example, if the backup fails regularly or on a particular day, that tape may be faulty and need replacing. A gradual increase in backup failures over time suggests deterioration of backup tapes. Record all backup failures, including the action taken to resolve the problem.

8.1.3 Care and handling of tapes

Do not force a tape into the backup device. Never leave a tape (normal or cleaning) in the tape backup unit when not in use (except overnight or whenever the backup takes place). Remove the backup tape in the morning and store it in a safe place, and do not insert the replacement tape until last thing at night. As well as maximising tape life, this reduces the amount of dust entering the tape drive mechanism, increasing backup reliability. Tapes will also last longer if the EMIS server is in a dust-free location. Do ***not*** stick extra labels onto the tape case, as they could jam the tape drive.

8.1.4 Tape rotation and replacement

It is essential to rotate backup tapes. EMIS recommends that you have two sets of tapes and alternate them on a weekly basis. Keep one set on site and store the other in a secure location off site. Replace backup tapes approximately every six months, or yearly if you use two sets of tapes. Use the manufacturer’s recommended tapes.

8.1.5 Storage

Backup tapes should be stored in their cases in a data safe (***not*** a fire safe, which does not give the same level of protection) when not in use. A data safe protects tapes against fire, dust, humidity, magnetic fields and static. Remember that the backup tapes contain your whole practice system: keep them safe and secure when they are taken off site. Keep a record of the location of every backup tape.

8.1.6 Cleaning the tape drive

Clean the tape backup unit at least once a week, and after every backup failure. Clean the backup unit every day if building work is being carried out at your practice. Use the manufacturer’s recommended cleaning tapes, ***not*** swabs or other means of cleaning the heads, as these may damage the backup device.

Write the date and your initials on the label of the cleaning tape box every time you clean the backup device. Do ***not*** try to clean the tape or tape guides inside the cartridge.

8.1.7 Tape validation service

EMIS recommends that your backup tapes are validated regularly, and offers a tape validation service. Contact EMIS for further details.

8.2 Backup failure procedure

1. Clean the tape drive.
2. Check your daily backup log for patterns of backup problems; for example a regular Thursday backup failure indicates a faulty tape.
3. If your backup tapes are more than six months old, try a brand new tape.
4. Report any backup problems to EMIS, giving details of your server type, server serial number, tape drive model and the age and type of your backup tapes.

9 System security

This section highlights some of the recommended guidelines on system security for EMIS PCS.

Contact your nominated practice trainers for more information.

9.1 Passwords

You should have your own unique password, which you should not disclose to other users.

Change your password regularly, when EMIS PCS prompts you to do so (the password expiry time is specified in Locations Manager, on the Practice Settings screen).

Always log on to EMIS PCS using your own password. When you have finished using EMIS PCS, or if you are leaving your PC unattended, either log off EMIS PCS or change user (see ***Log off*** on page 7 and ***Changing user*** on page 12).

Please note that EMIS ***cannot*** release passwords. If you forget your password, contact your system administrator.

9.2 Virus protection

Most EMIS PCS software upgrades are sent electronically by a mechanism called the patch, but if disks are sent from EMIS, they are first checked for all known viruses using the latest virus protection software.

You ***must*** virus-check all other disks that come into the practice, and ensure that you update your virus protection software regularly.

10 Troubleshooting

If you have a problem with EMIS PCS, EMIS recommends that you first make some basic checks and/or try to reproduce the problem to ensure it is not a one-off occurrence. Some checks are suggested below.

10.1 Printer does not print

Check that:

- The printer is switched on.
- The printer cable is securely connected to the printer.
- The on-line indicator is on; if not, press the on-line button.
- The paper is loaded correctly.
- There is no indicator showing that ribbon or ink is running dry.

After making these checks, switch the printer off and then on again.

10.2 PC does not work

Check that:

- The PC is plugged in and switched on (look for a light on the front of the screen).
- The brightness and contrast on the screen have not been changed.
- The keyboard is connected.
- EMIS PCS is working on other PCs in the practice.
- The cable from the PC to the power socket is connected properly.

10.3 You cannot log on to EMIS PCS

Check that:

- The PC is switched on (look for a light on the front of the screen).
- The brightness and contrast on the screen have not been changed.

If EMIS PCS will not accept your password, try typing it again. If the problem persists, contact your system administrator.

11 EMIS Support

If you have a problem with EMIS PCS that you cannot resolve using the troubleshooting checks in the previous section, follow the guidelines recommended by your PCO on who to contact. If the guidelines advise you to contact EMIS in the first instance, contact EMIS Support 0845 122 2333.

Support lines are open:

- Monday to Friday, 8am to 6pm
- Saturday, 9am to 1pm

11.1 Information required by EMIS Support

When you call EMIS Support you will first speak to a call centre consultant, who will ask you for the following information:

- Your customer database (CDB) number.
- If you can recreate the problem.
- The full key sequence needed to reproduce the problem.
- A list or examples of screens and printers that the problem occurs on, including the screen and printer line numbers and printer type.
- Patient numbers of patients for whom the problem occurs. If there are many patients, select a few examples.
- Your contact name and number, if different from the usual practice number.

11.2 How EMIS Support deals with calls

When you call EMIS Support the call centre consultant records your CDB number and the details of your problem and generates an EMIS Customer Reference (ECR) number for each problem. Keep a record of the ECR number and the problem it relates to.

The call centre consultant then passes these details to a support consultant who specialises in the type of problem you have reported. The support consultant may resolve the problem over the modem, or contact you to obtain further information or to ask you to try various options to diagnose and fix the problem.