

EMIS Web: Batch Data Manager

Use this training handout to help you use Batch Data Manager. Batch Data Manager is designed to help users add clinical codes, run protocols and perform set calculations against a targeted group of patients identified within a search population, on an admin list, or within an appointment list

Note: It is important to be aware of the potential consequences of batch adding any data incorrectly to patient records. EMIS recommends that the following considerations are made before anything is batch added:



- Has the target group been identified correctly?
- Is batch adding the data to the target group clinically justified?

When the batch add finishes, EMIS recommends that you check a few of the affected patient records to ensure the data has been added as expected. It is only possible to undo a batch add within *seven days* of it being run. It is therefore important that you check the data has been added as expected as quickly after the batch add as possible.

EMIS Web will only allow a batch add to be undone within seven days because, the longer data that has been batch added is present in patient records, the more likely it is that a clinician will act on it. If a batch add is undone, there is no check to see if the data has been subsequently acted on, which could then result in an incomplete medical record.

Access Batch Data Manager

Access the Batch Data Manager module in one of the following ways:

- Click , point to **Reporting**, and then select **Batch Data Manager**.
- If you have customised the quick access toolbar, click .
- If you are already in Population Reporting, click the **Batch Data Manager** tab, or press **ALT**, and then press **B**.
- From the homepage, press **ALT**, press **E**, press **S**, and then press **B**.
- On the homepage, click the link, if configured.

The Batch Data Manager screen is displayed.

Batch add a clinical code

1. Access Batch Data Manager.
2. On the ribbon, click **Add** and select **Clinical Code**.

The Add Batch Data screen is displayed.

Clinical Code Add Batch Data screen

3. In the Clinical Code to Add to Patient Record section, beside the Clinical Code field, click . The Add a Code screen is displayed.
4. Use the Add a Code screen to select the required clinical code, and then click **OK**. The clinical code is added to the Add Batch Data screen.
5. In the Description field, type a description for the clinical code.
Note: Any description added here is only displayed on the Batch Data Manager screen.
6. In the List of Patients to Add Data to section, click the List Type field and select one of the following:
 - Search Population (Included).
 - Search Population (Excluded).
 - Admin List.
 - Appointment Session.
7. Beside the field, click . Depending on which list type option you selected, one of the following screens will be displayed:
 - Select Search screen (Search Population Included); select the required search, and then click **OK**.
 - Select Search screen (Search Population Excluded); select the required search, and then click **OK**.
 - Admin List Picker screen (Admin List); select the required administration list, and then click **OK**.
 - Batch Data Manager screen (Appointment Session); select the required appointment session, and then click **OK**.
8. In the Batch Scheduling section, select one of the following as required.
 - **Immediately:** select to run the batch straight away.
 - **Schedule:** select to use the calendar and time fields to set a date and time for the batch to run.
9. Click **OK**. The batch is run immediately, or the schedule run time is set depending on which option you selected.

Batch running protocols

Note: You can only batch run a protocol if there are no user interactions required during the course of the protocol.

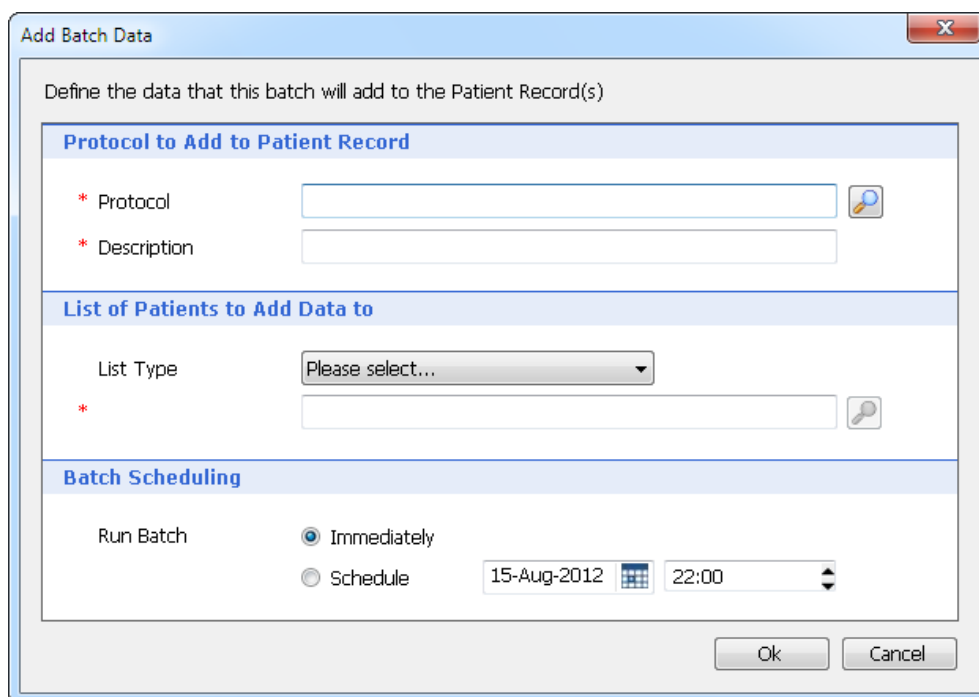
When attempting to batch run a protocol, it is important to remember that the Protocol Picker screen will only allow selection of protocols that conform to the following rules:

- It must be a protocol not a template.
- It must not be an alert protocol.
- It must contain at least one of the following actions:
 - Add code.
 - Add diary.
 - Cancel diary.
- It must not contain any of the following actions:
 - Add consultation.
 - Add a drug.
 - Decision dialog.
 - Run template.
 - Add document.
 - Multiple choice dialog.
 - Text dialog.


Batch run a protocol

1. Access Batch Data Manager.
2. On the ribbon, click **Add** and select **Protocol**.

The Add Batch Data screen is displayed.



Protocol Add Batch Data screen

3. In the Protocol to Add to Patient Record section, beside the Protocol field, click .

The Batch Protocol Picker screen is displayed.

4. Use the Batch Protocol Picker screen to select the required protocol, and then click **OK**.


The protocol is added to the Add Batch Data screen.

5. In the Description field, type a description for the protocol.

Note: Any description added here is only displayed on the Batch Data Manager screen.

6. In the List of Patients to Add Data to section, select one of the following list types:

- Search Population (Included).
- Search Population (Excluded).
- Admin List.
- Appointment Session.

7. Beside the field, click .

Depending on which list type option you selected, one of the following screens will be displayed:

- Select Search screen (Search Population Included); select the required search, and then click OK.
- Select Search screen (Search Population Excluded); select the required search, and then click OK.
- Admin List Picker screen (Admin List); select the required administration list, and then click OK.
- Batch Data Manager screen (Appointment Session); select the required appointment session, and then click OK.

8. In the Batch Scheduling section, select one of the following as required.

- **Immediately:** select to run the batch straight away.
- **Schedule:** select to use the calendar and time fields to set a date and time for the batch to run.

9. Click **OK**.

The batch is run immediately, or the schedule run time is set depending on which option you selected.

Batch perform calculations

When attempting to perform a batch calculation, it is important to remember that batch calculations can only be performed on patients that fit the following criteria:

- QRisk2
 - Must be aged 30 – 84.
 - Must have no current record of heart disease.
- QDScore
 - Must be aged 25 – 79.
 - Must not be currently diabetic.
- BMI
 - Must have height and weight recorded.

Batch perform a calculation

1. Access Batch Data Manager.
2. On the ribbon, click **Add** and select **Calculation**.

The Add Batch Data screen is displayed.

Calculation Add Batch Data screen

3. In the Calculation to Add to Patient Record section, beside the Calculation field, click . The Batch Data Manager screen is displayed.
4. Select the required calculation from the following options:
 - QRISK2.
 - QDScore.
 - BMI.
5. Do one of the following:
 - In the Authorising User field, click and select the required user.
 - Beside the Authorising User field, click , and then use the Find Users screen to select the required user.
6. Click **OK**. The calculation is added to the Add Batch Data screen.
7. In the Description field, type a description for the calculation.

Note: Any description added here is only displayed on the Batch Data Manager screen.
8. In the List of patients to add data to section, select one of the following list types:
 - Search Population (Included).
 - Search Population (Excluded).
 - Admin List.
 - Appointment Session.
9. Beside the field, click . Depending on which list type option you selected, one of the following screens will be displayed:
 - Select Search screen (Search Population Included); select the required search, and then click **OK**.
 - Select Search screen (Search Population Excluded); select the required search, and then click **OK**.

- Admin List Picker screen (Admin List); select the required administration list, and then click **OK**.
- Batch Data Manager screen (Appointment Session); select the required appointment session, and then click **OK**.

10. In the Batch Scheduling section, select one of the following as required.

- **Immediately:** select to run the batch straight away.
- **Schedule:** select to use the calendar and time fields to set a date and time for the batch to run.

11. Click **OK**.

The batch is run immediately, or the schedule run time is set depending on which option you selected.

Undo a batch added item

Note: You can only undo a clinical code and calculation batch within seven days of the batch being run; you *cannot* undo a protocol batch.

1. On the Batch Data Manager screen, select the batch you want to undo.

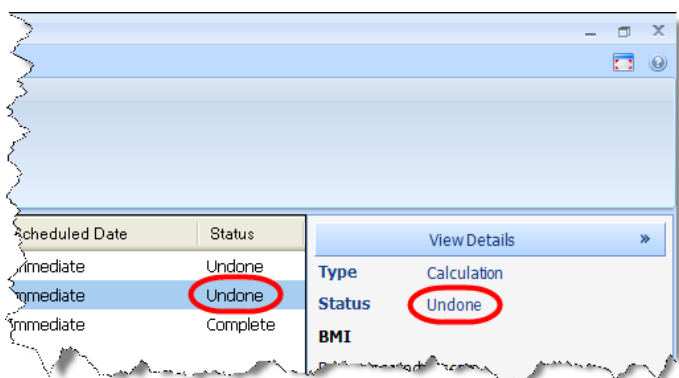
2. On the ribbon, click **Undo**.

A confirmation prompt is displayed.

3. Click **Yes**.

The batch status is changed to Undone.

The batch status can be viewed via the Status column of the main pane and also by viewing the View Details pane.



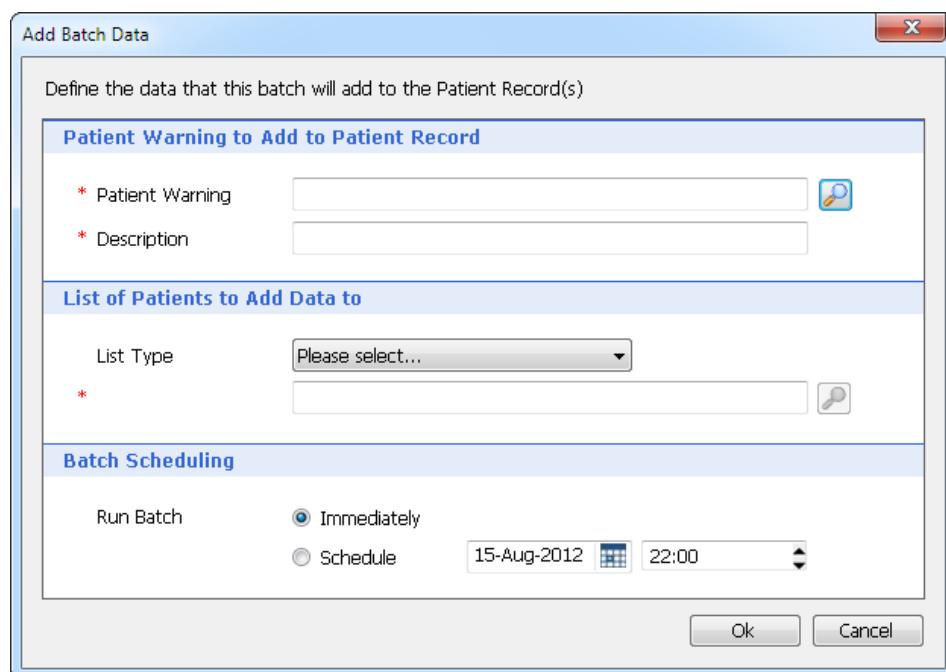
Batch Data Manager screen with the status positions highlighted

Batch add a patient warning



1. Access Batch Data Manager.

2. On the ribbon, click **Add** and select **Patient Warning**.

The Add Batch Data screen is displayed.

A screenshot of the 'Add Batch Data' dialog box. The dialog box has a title bar with a close button. The main area is titled 'Define the data that this batch will add to the Patient Record(s)'. It contains three sections: 'Patient Warning to Add to Patient Record' with fields for '* Patient Warning' and '* Description'; 'List of Patients to Add Data to' with a 'List Type' dropdown menu and a search field; and 'Batch Scheduling' with radio buttons for 'Run Batch' (immediately selected) and 'Schedule', and a date/time picker showing '15-Aug-2012' and '22:00'. At the bottom are 'Ok' and 'Cancel' buttons.

Patient Warning Add Batch Data screen

3. In the Patient Warning to Add to Patient Record section, beside the Calculation field, click .
The Add Patient Warning screen is displayed.
4. In the Patient Warning Message field, type the warning message you want to be displayed.
5. Select the required trigger point(s) from the following options:
 - Swap Patient.
 - Load medical record.
 - Add Drug.
 - Issue Drug.
 - Add consultation.
 - Book Appointment.
 - Arrive Patient.
6. Click **OK**.
The warning message is added to the Add Batch Data screen.
7. In the Description field, type a description for the patient warning.
Note: Any description added here is only displayed on the Batch Data Manager screen.
8. In the List of patients to add data to section, select one of the following list types:
 - Search Population (Included).
 - Search Population (Excluded).
 - Admin List.
 - Appointment Session.
9. Beside the field, click .
Depending on which list type option you selected, one of the following screens will be displayed:
 - Select Search screen (Search Population Included); select the required search, and then click **OK**.
 - Select Search screen (Search Population Excluded); select the required search, and then click **OK**.
 - Admin List Picker screen (Admin List); select the required administration list, and then click **OK**.
 - Batch Data Manager screen (Appointment Session); select the required appointment session, and then click **OK**.
10. In the Batch Scheduling section, select one of the following as required.
 - **Immediately:** select to run the batch straight away.
 - **Schedule:** select to use the calendar and time fields to set a date and time for the batch to run.
11. Click **OK**.
The batch is run immediately, or the schedule run time is set depending on which option you selected.

For further information, see [Batch Data Manager in EMIS Web Help](#) 

This handout is only a guide to supplement the training you receive.

For further training, contact EMIS Field Operations Support: 0845 123 4455

For all your post-training support queries, go to the EMIS Web Online Support Centre, accessible from the EMIS Web homepage.

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