

EMIS Guidance – CCAS

This guidance is specifically for the CCAS Worklist Set-Up

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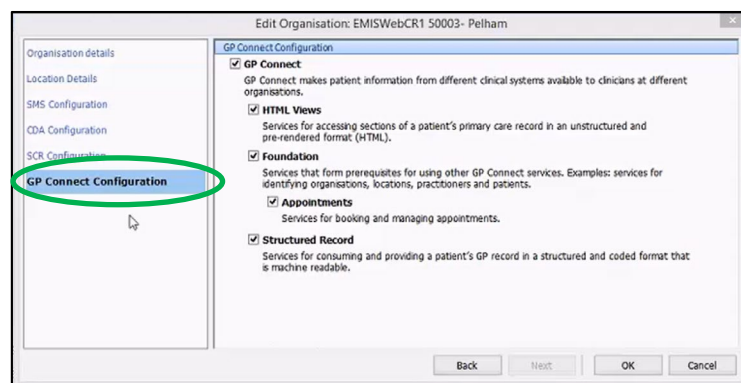
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Prerequisites:

1. You must know your **Practice ODS Code**
2. CCAS ODS Code – **RYEA3**

Step 1: Review Config (EMIS will be completing this step in a phased approach)

1. Select **Configuration** from the **EMIS Ball**
2. Select **Organisation Configuration**
3. In the navigation tab, click **Organisation** *[towards the bottom of the screen on the left-hand side]*, highlight your practice
4. On the ribbon, Click **edit**
5. Click on **GP Connect Configuration** (last on the list on the left-hand side)
6. Tick the boxes highlighted including the Foundation and appointments sub boxes.
7. Click **OK** and restart EMIS



Step 2. Set-Up Organisation Groups (to share appointments with the CCAS)

1. Select Configuration from the **EMIS Ball**
2. Select **Organisation Configuration**
3. Select **Organisation Groups** from the navigation pane *[towards the bottom of the screen on the left-hand side]*
4. Click **Add** on ribbon to add
5. The Add Organisation Group screen is displayed (As Below)


6. Name your organisation group **[practicename_COVID-19]**
7. Click on the **magnifying glass**
8. Type your **GP practice ODS** code and press **search**
9. Double click to add it to the **organisation group**
10. Click on the **magnifying glass**
11. Type **RYEA3**: The ODS code for the **'TRUST HQ'** (AKA the CCAS) & press **search**

NB: We are aware that in some cases EMIS Web may return "South Central Ambulance Service" when this ODS code is entered. This is a known issue and is being investigated by EMIS. This option has been tested and proven to work, therefore, please accept this option and continue the process.

12. Double click on **'TRUST HQ'** to add to group
13. Click **OK** to create the group

NB: Your organisation group name must be unique and therefore you must include your practice name to the organisation group name created.

The below will appear in the organisation group

Name	Created By
QueensRoadPractice_Covid-19	QUEENS ROAD PRACTICE
 Queens Road Practice Trust HQ	

Step 3. Create CCAS Specific Sessions

1. Click **Appointment Book** on the top ribbon
2. Click **Create Session**
 - Session Name: **CCAS COVID-19**
 - Session Type: **Timed Appointments**
 - Appointment Times: **From Practice Opening time to Practice Close time**
 - Start Date: **Immediate (today)**
 - Slot Duration: **20 or 30 Minutes**
 - Session Category: **Default Non-List Category**

Create Session

Session Details

Session Name

Session Type

Timed appointments

Start Date

27-Nov-2018

from

to

Slot Duration

10

minutes

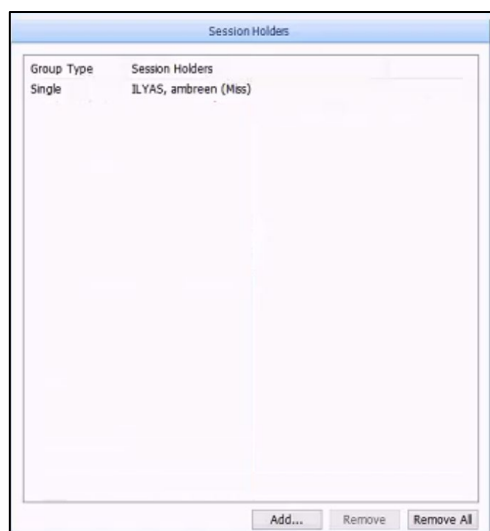
Session Category

Please select a category

3. You must add a **Session Holder** by clicking on the ribbon below

Session Holders (click to edit)

4. Click **Add** at the bottom of the screen and select a Clinician from your Practice.



5. **All Slots GP Connect Bookable:** you will see a differing screen dependant on your platform and version release of EMIS.

Layout A: Click 'SET ALL'



NB: You will not be able to make slots GP Connect Bookable until a session holder is attached.

Layout B: Select Dropdown and choose 'Yes'



6. GP Connect Bookable Appointments will now have a '**Globe**' icon viewable next to the Appointment Slots.

Session Preview		
111 Direct Booking		
Time	Description	
08:00	10 mins	
08:10	10 mins	
08:20	10 mins	
08:30	10 mins	
08:40	10 mins	
08:50	10 mins	
09:00	10 mins	
09:10	10 mins	
09:20	10 mins	
09:30	10 mins	
09:40	10 mins	
09:50	10 mins	
10:00	10 mins	
10:10	10 mins	
10:20	10 mins	
10:30	10 mins	
10:40	10 mins	
10:50	10 mins	

7. Click **Apply Filter**

- Filter Type: **Organisation Group**
- Name: **[practicename_COVID-19]** (as Created in previous section)
- Number of Slots: **Input the TOTAL Number of slots created for the session (this can be found at the top of the Pop-Up as identified below)**
- Kind: **Reserve**

Apply Filter

This session has 6 slots

Filter 1

* Filter Type: Organisation Group

* Name:

* Number of slots:

* Kind: Select a kind

Add Filter OK Cancel Remove All

8. Click **Save as Template...**

Load from template... Save as template... Save Template

9. **Apply template** for the foreseeable future.

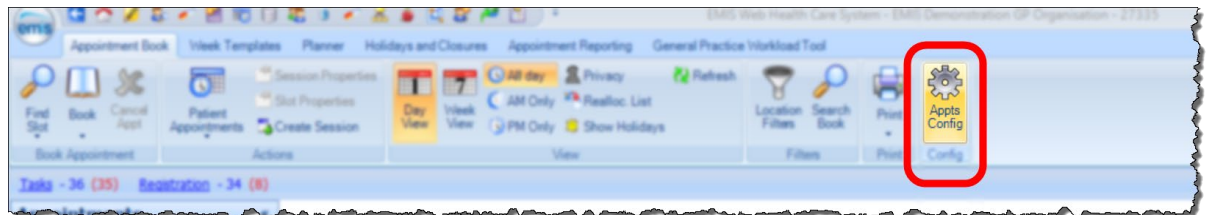
V8.0

NB: The CCAS will only be able to book into the Appointments Session that has been created as per instructions above.

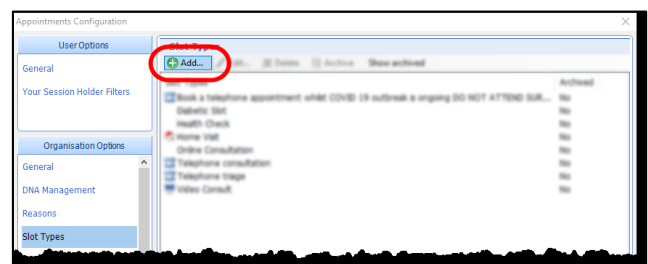
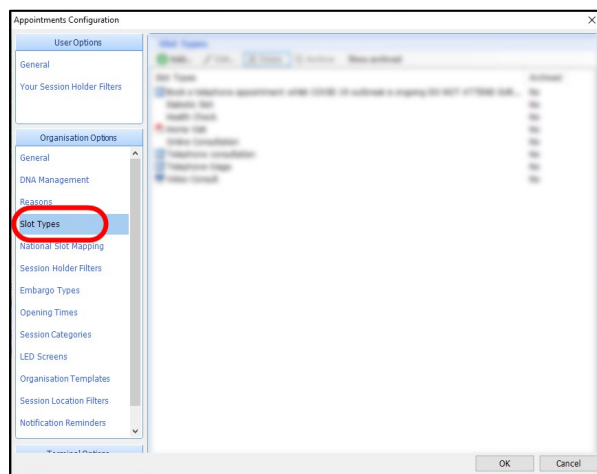
Step 4: Slot Types

If you already have Telephone Slot Type, please skip to point 5 below.

1. Select **Appointments** from the **EMIS Ball**
2. Select **Appointment Config** from the top ribbon



3. Select **Slot Types**
4. Click **Add Telephone Appointments**



5. Select your **COVID-19 slots** or **whole Session**.
6. Edit the **slot type** to Telephone.

Slot Type Details

* Name: Test

Bookable Slot: ☒

Status Type: Telephone

Embargo Type: Appointments

Foreground colour: [Color Picker]

Background colour: [Color Picker]

Slot Alert: [Text Field]

Allow auto DNA: ☐

Send Notification: ☒

Icon: Phone

OK Cancel

NB: Patients will not be informed of a Slot Type, and will not be advised to contact or visit the practice