

BMC Document Workflow

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1.0	Megan Joscelyne	01/07/2023
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1. Introduction

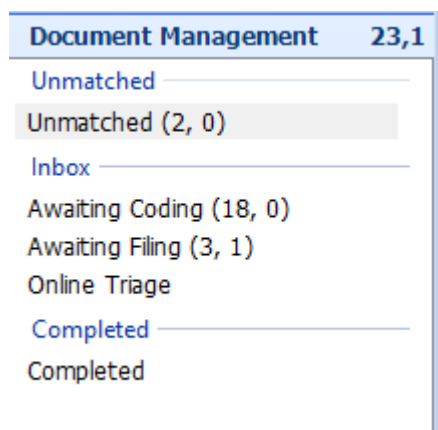
The purpose of this document is to set out the process for managing document workflow in EMIS.

2. Process

All Documents that come into EMIS to be reviewed annotated and coded will appear in workflow, to get this to this click on the emis button in the top right-hand corner and select,

- **Workflow** then select from the left side of the page,
- **Document Management**

You will then see;



Unmatched Patients

To begin firstly go into the unmatched folder.

Double click on the first document, scroll down until you find the patients D.O.B, Name and



Address. Then on the top of the ribbon you will see a icon that says **Find Patient** Click on this.

Enter the patients details to see if the patient is registered with us. If the patient is registered with us then please go onto the **Awaiting Coding section**.

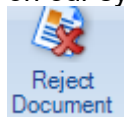
If a patient matching box comes up, this will show several patients that emis have found with certain matching details. If you find a patient with every detail matching across both then you can click OK and move onto **Awaiting Coding**. The patient matching box will look as below, and you will need to check that the side of the unmatched also matches the side of the selected patient.

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Received: 02-Aug-2023 05:29	Unmatched Patient		Selected
Title	[Redacted]	✗	[Redacted]
Surname	[Redacted]	✓	[Redacted]
Forenames	[Redacted]	✗	[Redacted]
Date of Birth	[Redacted]	✓	[Redacted]
Sex	[Redacted]	✓	[Redacted]
Address	[Redacted]	✗	[Redacted]
Post Code	[Redacted]	✗	[Redacted]
NHS Number	[Redacted]	✗	[Redacted]

Near matches

If the patient is not registered with us however and you do not find any details that are correct on our system, you will need to reject the document, on the top ribbon you will see a icon



once you have clicked on this, another box will appear.

Document rejection reason

i Please note the sender will NOT be informed of the document rejection.

Please provide additional details for rejecting this document.

OK Cancel

you will need to enter the reason such as; This patient is not registered at Broadmead Medical Centre. When you select Ok, you will also be asked if you would like to print the document. Select Yes and then stamp with Not a registered patient. This will then need to be sent back internally.

Now you are ready to begin coding and annotating your documents.

Awaiting Coding

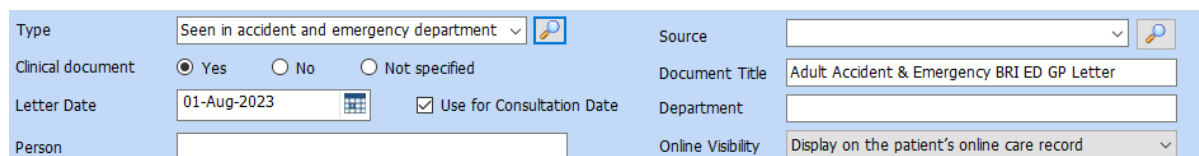
Now you are in your awaiting coding, open your first document.

The first thing for you to do is check the DOB, name and address is still the same as we have for the selected patient. Documents are usually the first way that we are alerted to a patient

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moving address. Always double check this and if you have confirmation the patient has moved then send a task on to the deductions team if they are no longer within our catchment area.

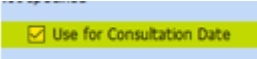
You will then need to establish where the document is coming from, which department, from a consultant to the patient or a letter from the hospital to the practice. When you have done this you can then add a code into the Type box, an example is as below;



The screenshot shows a form with the following fields and values:

- Type: Seen in accident and emergency department
- Clinical document: Yes (selected)
- Letter Date: 01-Aug-2023
- Person: (empty)
- Source: (empty)
- Document Title: Adult Accident & Emergency BRI ED GP Letter
- Department: (empty)
- Online Visibility: Display on the patient's online care record

Once your code is added into the type box you can add any extra information into the Document Title.

Always ensure that  this box is ticked. As you would when ticking yes or no for the clinical document choice.

Next you will need to read through the document, when it comes to anything significant that you think will be vital information for anyone opening the document and will need to see straight away, highlight this. Also any problems or changes to medication, new plans that are put in place again this will need to be highlighted. To do this, when you see this ribbon at the top of your document,

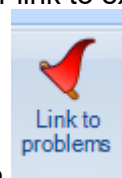


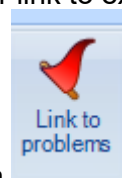
Click on,



This will allow you to click and drag a highlight across the information you are adding.

Any problems that are added in the letter you will need to either link to existing problems or add



a new problem. To check if a problem is already coded click on  on the ribbon at the top and this

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Care Record Picker

Search View Show Latest

<input type="checkbox"/>	Problem	Onset Date
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OK Cancel

box will appear. Normally there will be a list of problems listed, select the ones that should be linked with the information in your document and select OK.

If the problem code has not already been added or is a new Diagnosis then a new code will



need to be added. To do this go to the top ribbon again and select Add your problem to the search bar. For instance if there was new diagnosis for Type 2 Diabetes, I would type Diabetes into the search bar. **Remember that QOF marked codes are codes that are searched on and as long as accurate, should always come first.**

Once I have searched for Diabetes it will look like this;


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The screenshot shows a medical coding software interface. At the top, there is a search bar with 'diabet' entered. Below the search bar are filter buttons for 'All codes', 'Findings', 'Disorders', 'Observations', 'Procedures', 'Family history', 'Allergies & reactions', 'Referrals', and 'Admin'. The main area displays '197 search results' for 'Type 2 diabetes mellitus'. A 'Selected code' window is open, showing the code 'Type 2 diabetes mellitus' with a date of entry '02-Aug-2023'. The 'Problem detail' section has a checked box for 'Record as Problem' and several dropdown menus for 'Active Problem', 'Significant', 'First Episode', and 'Remains active indefinitely'. At the bottom of the window are 'Options', 'Add Another', 'OK', and 'Cancel' buttons.

You will need to ensure that you tick the box to **Record as Problem**. You can also change the information on the last line of that box, as to whether it is an active problem or has ended, if it is significant or minor and also to set it for how long you would like it to remain as an active problem.


Once you have completed your coding and annotating you will then need to ensure that any information in regards to the diagnosis, medication changes, follow up blood tests or blood



pressure checks are added to the consultation. You can do this by selecting , this will then appear in the consultation page with your document, allowing all vital information to be displayed clearly.

If the document has come through and is upside down or sideways always ensure to turn the document, using  these tabs.



For any **changes to medications** these will need to be sent to the **Pharmacy Team** via 

Any new or ongoing **Diabetic or Asthmatic** patient documents **must** be sent to the **LTC (long**



term condition) Nurses via 

Any information you think the doctor should be made aware of should be sent to the doctor who has seen the patient the most regular/recently or the referring GP. If due to sickness or annual

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leave then these should be sent onto the named GP, with an explanation as to why it is going to

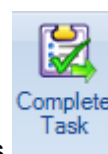


them in the absence of someone else. This again will be done by

Please remember that the Safeguarding lead will also need to be copied into the task should it relate to a safeguarding issue of children or adults.



New babies need to be sent to LW/AV to inform them via



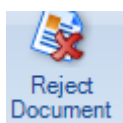
Once you have completed all of these areas, you can then press and it will move you onto your next document for coding.

Patients that are no longer registered with us.

As you are going through the documents you will occasionally come across patients that are no longer registered with us. You will need to close the document in this case.



Like before, you will need to reject the document,



once you have clicked on this, another box will appear.

Document rejection reason ✕

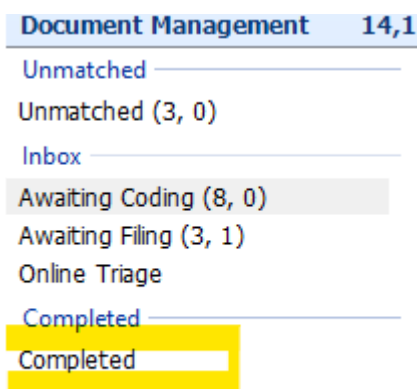
i Please note the sender will NOT be informed of the document rejection.

Please provide additional details for rejecting this document.

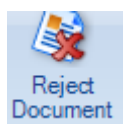
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Enter the reason such as; This patient is no longer registered at Broadmead Medical Centre.

The document will then seem as though it has gone but it has not. You will need to go into the completed documents to find the one you are rejecting.



This will take a while to load and then continue by



Enter the reason such as; This patient is no longer registered at Broadmead Medical Centre.

When you select Ok, you will also be asked if you would like to print the document. Select Yes and then stamp with Not a registered patient. This will then need to be sent back internally.

Awaiting Filing

These documents that come in will need to be actioned using the same process as with the awaiting coding.

Other information

Pregnancy will always need to be coded as an active problem, the estimated date of delivery code will be added to care history and not to the problem page unless the box for active problem is ticked upon coding.

When you have coded both of these, go to the problem page to group the two codes together. You can do this by highlighting both problems at the same time, right click and press group with the pregnant code as the top one.

New babies

When documentation comes in that a new baby has been born, the baby admin team will need to be notified via **a task**.

For any **changes or new medications** these will need to be sent to the **Pharmacy Team** via a task

Any new or ongoing **Diabetic or Asthmatic** patient documents **must** be sent to the **LTC (long term condition) Nurses** via **a task**.

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Any information you think the doctor should be made aware of should be sent to the doctor who has seen the patient the most regulary/recently or the referring GP. If due to sickness or annual leave then these should be sent onto the named GP, with an explanation as to why it is going to them in the absence of someone else. This again will be done by **task**.

Please remember that the Safeguarding lead will also need to be copied into the task should it relate to a safeguarding issue of children or adults.

Version Control

Date	Version	Author	Change Details
1.0	1/7/23	Megan Joscelyne	Original
	1/10/25		Reviewed no changes