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Practice Services Uploading Weekly EMIS Searches to Clinical Guardian

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1. Background

Clinical Guardian is a specialized, configurable audit tool designed for EMIS Web to help GP practices uphold high clinical safety and governance standards by tracking, monitoring, and reporting on clinical data. It aids in safer practice by identifying potential clinical risks, providing peer feedback, and offering insights on workforce productivity and service-level themes.

2. Purpose

To outline the process for running and uploading EMIS population reporting searches into Clinical Guardian.

3. Process

Run this SOP on the last working day of each week.

Part 1: Run EMIS Population Reporting Searches

1. Open Population Reporting

- Open EMIS Web.
- Go to Population Reporting.

2. Locate the Clinical Guardian Folder

- In the left-hand folder list, find and open the Clinical Guardian folder.

3. Run the Weekly Searches.

- Inside the folder you will see two searches (a top one and a bottom one).
- Right-click the bottom search → Run and wait for it to fully complete. (Both will search)

Part 2: Export the Bottom Search

4. Open the Extract

- Right-click the bottom search.
- Select View Results.
- Click Export.

5. Export the File

- Choose CSV as the file format.

- Click OK.
- Choose your desired save location.
- Click Save.

6. Complete the Export

- Wait for EMIS to finish exporting.
- Look for an "Export report result" pop-up.
- Click Continue.

Part 3: Upload File to Clinical Guardian

7. Sign in to Clinical Guardian

- Open the Clinical Guardian website.
- Sign in with your username and password.

8. Upload the File

- Click Admin at the top.
- Select Case Upload.
- Click Choose File/Browse and select the exported CSV.
- Click Upload.

This is saved Y:\Clinical Guardian
The document can be saved over as we do not need to keep a record of the report.