BluebayCT Reporting Quick Reference Guide - EMIS Web

BlueBayCT reports look at the accuracy of your registers and help identify patients requiring a review or management. Using the integrated data entry tools you can work on patient lists or send a group of patients a letter.

This quick reference guides explains how to run BlueBayCT reports and work with the combined tools. It is intended for use by EMIS Web practices.

Pre-requisites

Someone will contact your practice to explain the requirements before using BluebayCT. In summary, we recommend the following:

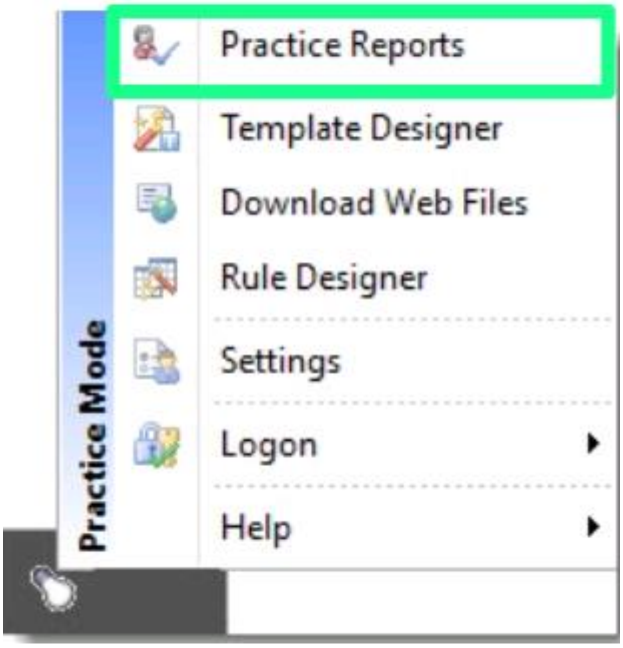
- Install BlueBayCT on all workstations used by clinical staff who will be using templates and/or reports.
- As BlueBayCT is a third party product, EMAS Manager in EMIS Web requires configuring. For more information on EMAS Manager, please refer to the EMIS support website *EMIS EMAS Manager https://supportcentre.emishealth.com/help/system-tools/emas-manager/*.
- BlueBayCT uses the EMIS Web extract facility so someone from EMIS will contact you to request that data can be extracted and provide you with configuration instructions.
- You will be sent a data agreement which should be signed by the Practice Manager/GP and returned to us. Once the agreement is received, we will contact you with an activation date, at which time you can start using BluebayCT.

Accessing BluebayCT Reports

To access BluebayCT reports you must be logged into EMIS Web and **not** have a patient selected.

BluebayCT automatically starts up and runs on your Windows Taskbar as an icon  .

Right click on the **BlueBayCT**  icon and select **Practice Reports**.

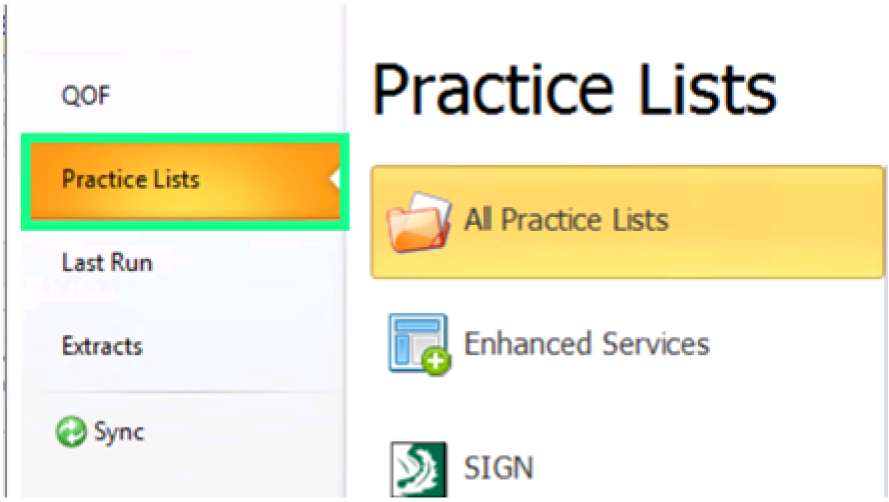


Practice Reports

Running Reports

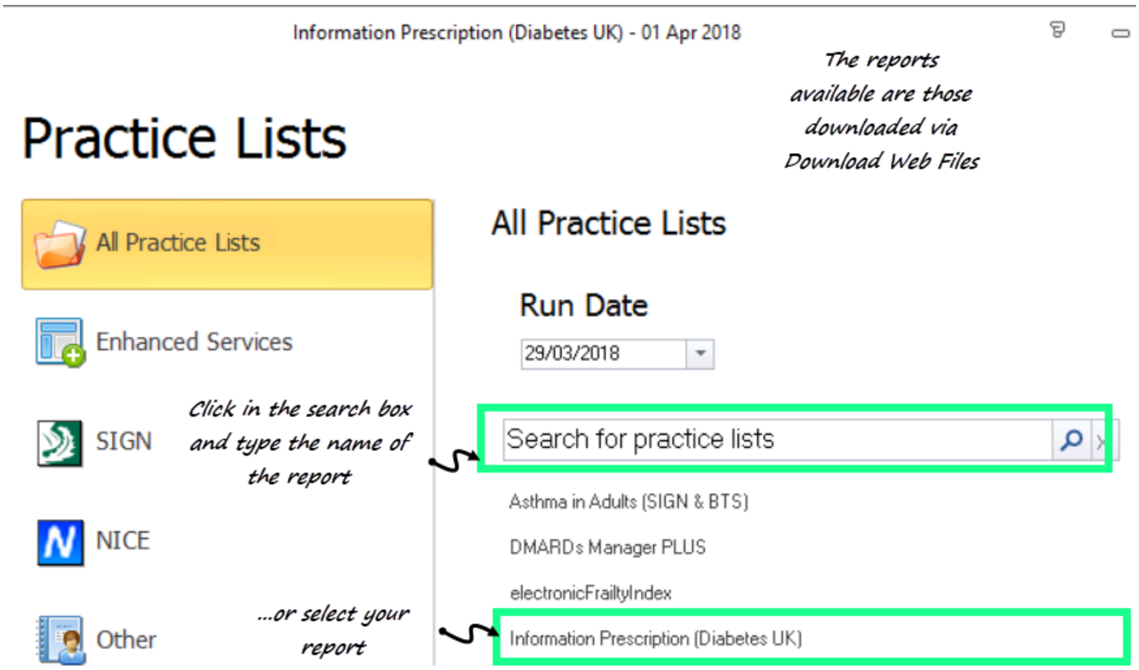
To run a report:

1. From the Practice Reports screen, select **Practice Lists**.



Practice Lists

2. Choose the report you want to run or use the search box to find the report.



Practice Lists

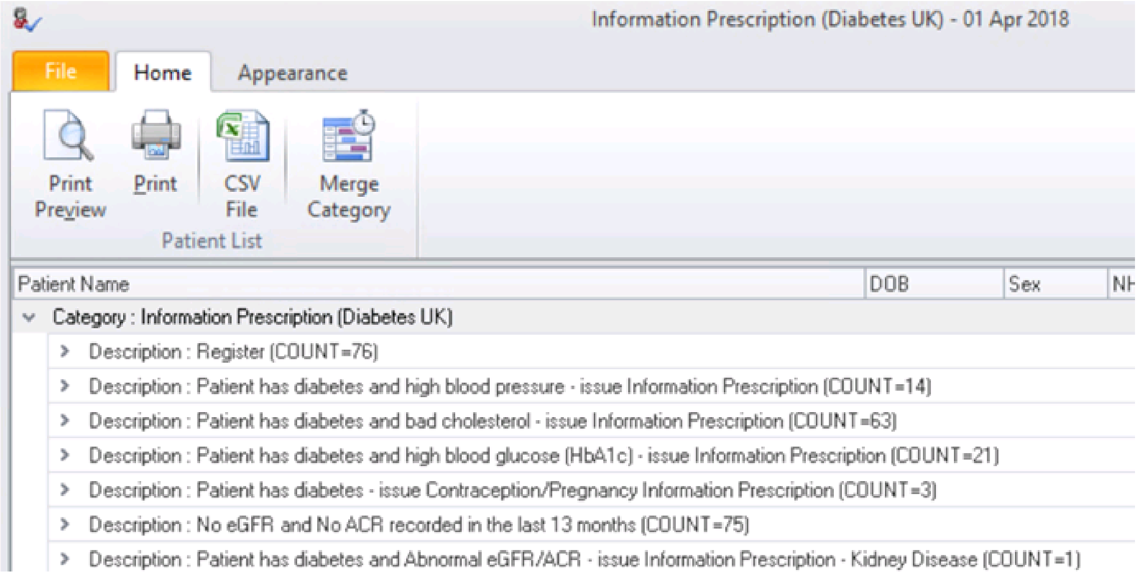
3. Once the report is complete you can:
   - View patient lists - see *Viewing Patient Lists* (page 3)
   - Perform a mail merge - see *Performing a Mail Merge* (page 5)

Viewing Patient Lists

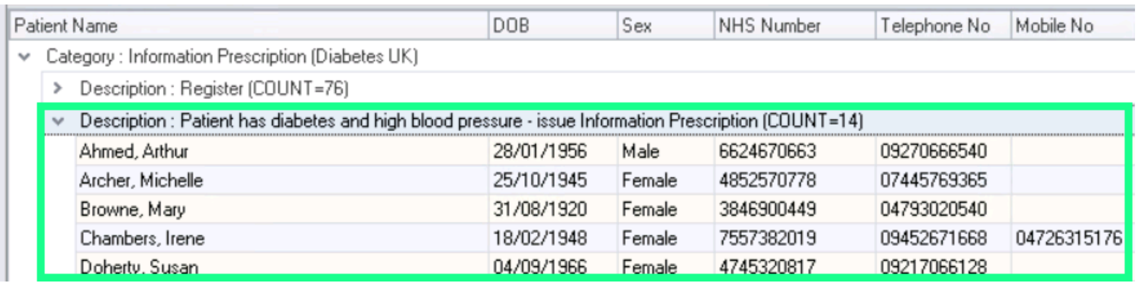
When a report is run, the patient list screen displays showing the results.

Note - For this guide, Diabetes screenshots are used.

1. Click the arrow › to view patient lists.

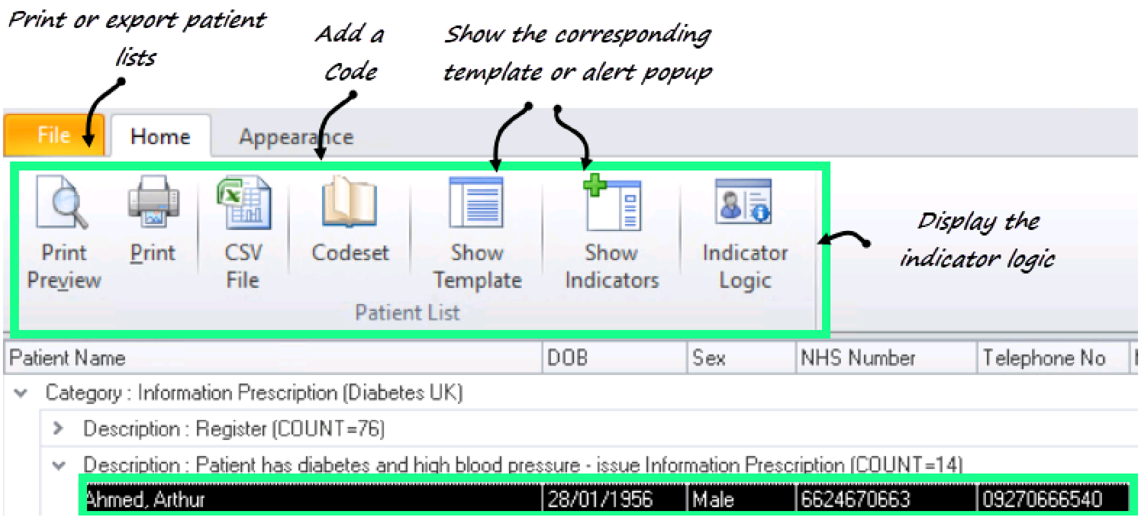


Reports



Patient Lists

2. Highlight the patient and use one of the following options on the toolbar to quickly record data. The patient record is automatically updated and their name is removed from the list.



Patient Lists - Data Entry Tools

Performing a Mail Merge

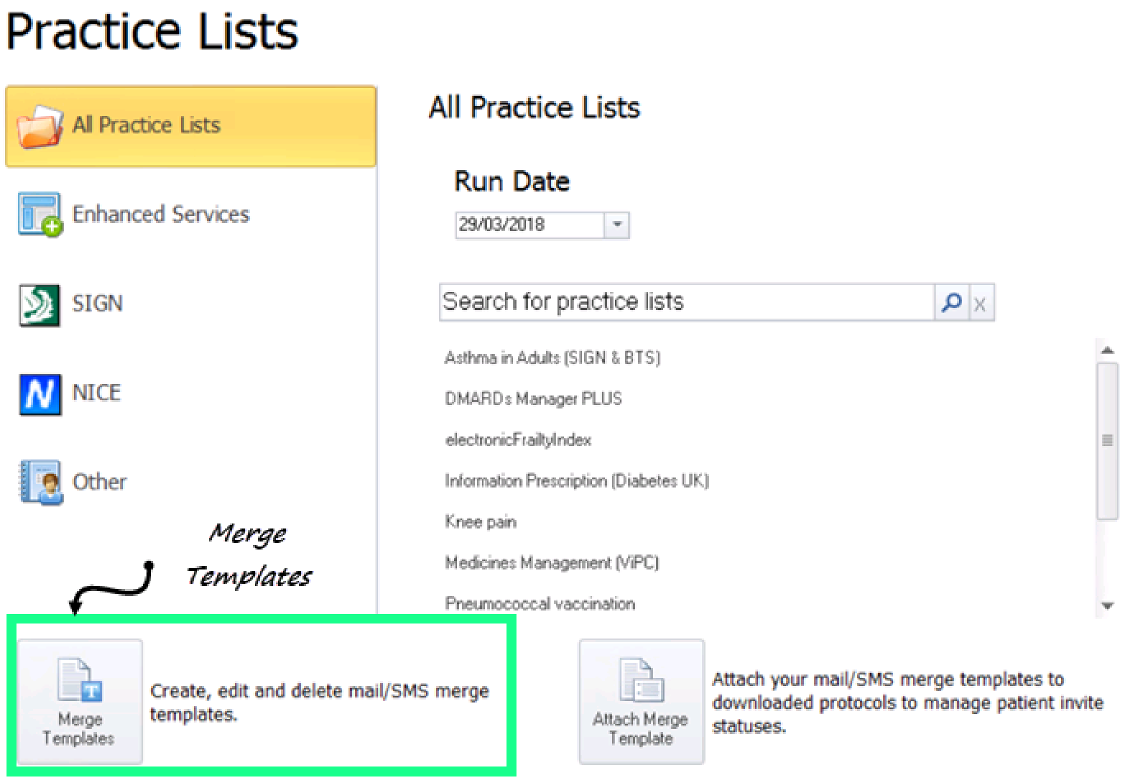
Once you have run your reports, you can use the BlueBayCT merge facility to send a letter to a group of patients. In this example, we are going to create a letter and send it to those patients in the Information Prescription, Diabetes group who require a review. To do this, you need to:

- Create a template letter and attach it to a report - see *Creating a Letter Template* (page 6)
- Send a group of patients a letter - see *Sending a Group of Patients a Letter* (on page 9)

Creating a Letter Template

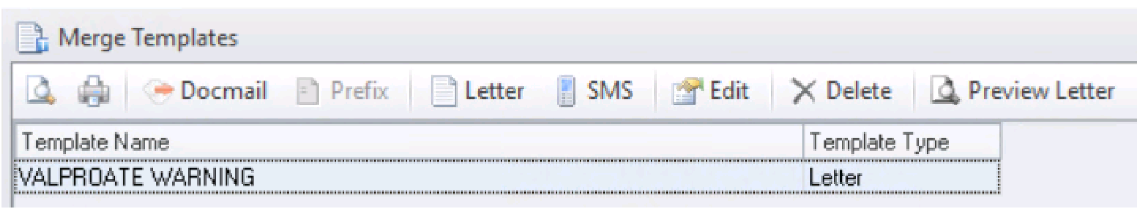
To design a template letter:

1. From Practice Lists, click **Merge Templates**.



Merge Templates

2. The **Letter Templates** screen, shown below, allows you to manage the list of letter templates you have created.



Merge Templates - Letters

3. On the toolbar, click **Letter** 

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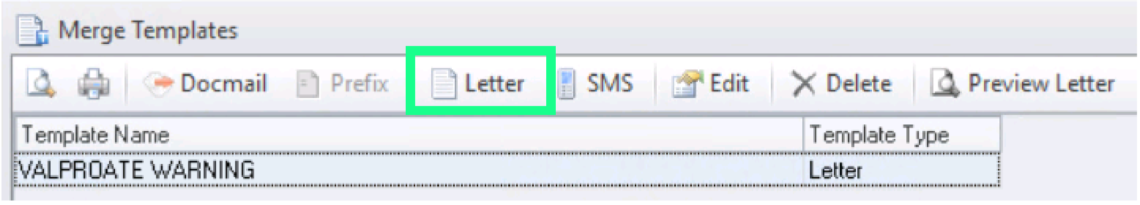
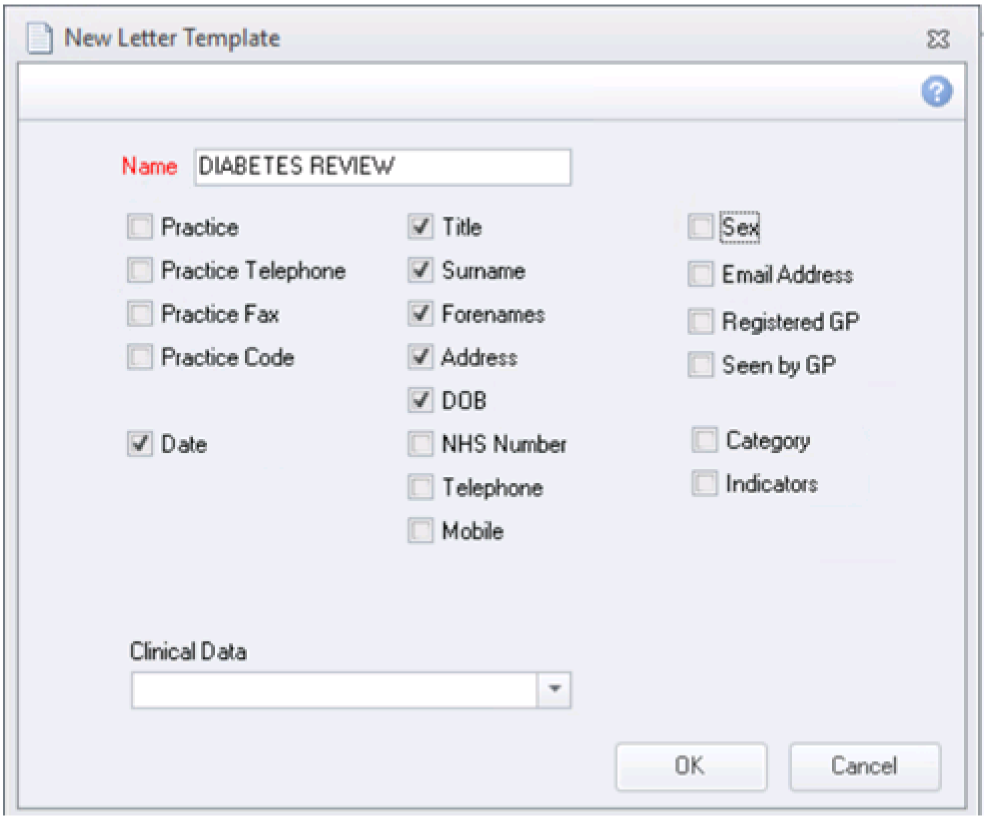


Creating a new letter

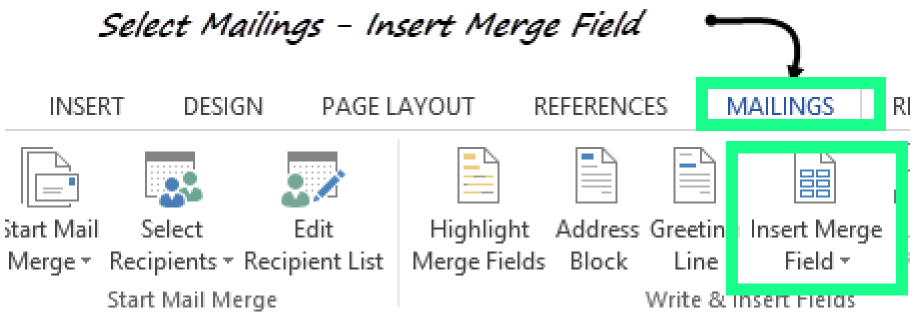
4. Type a descriptive **Name** for the new template.
5. Select the checkbox of each item of information from the patients records you would like to merge into the letter, or clear the checkbox for any items you don't require.



Merge Options

6. Click **OK** and Microsoft Word opens in a new window with a basic template layout displayed.
7. Use Microsoft Word to make any changes to the template layout you require.

Any mail merge fields appear with a {{ }} around them but you can move them around or copy them to other areas of the document. Alternatively, you can insert additional merge fields from within Word by selecting **Mailings** and choosing **Insert Merge Field**.



Mailings - Insert Merge Field

You can use all of the familiar word processing features in Microsoft Word to make the layout of the letter more attractive. They can also be formatted and justified in the usual way.

8. In Microsoft Word, click the **Save** button ().
9. **Close** Microsoft Word.
10. Now that the letter has been created you need to attach it to the corresponding report. To do this:
11. From the **Practice Lists** screen, click **Attach Merge Template** 

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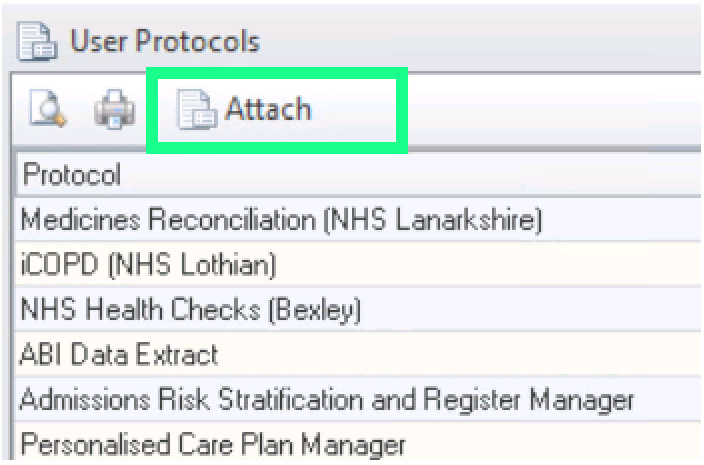
12. Next, select the Vision+ template you wish to apply the letter template to and click **Attach**.



User Protocols - Templates

13. The **Letter Templates** screen is displayed. Click **Letter** 

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14. Choose the letter template you wish to use and click **Open**.
15. The letter template is now added to the **Templates Screen** for the selected BlueBayCT template.
16. Click **OK** to close.

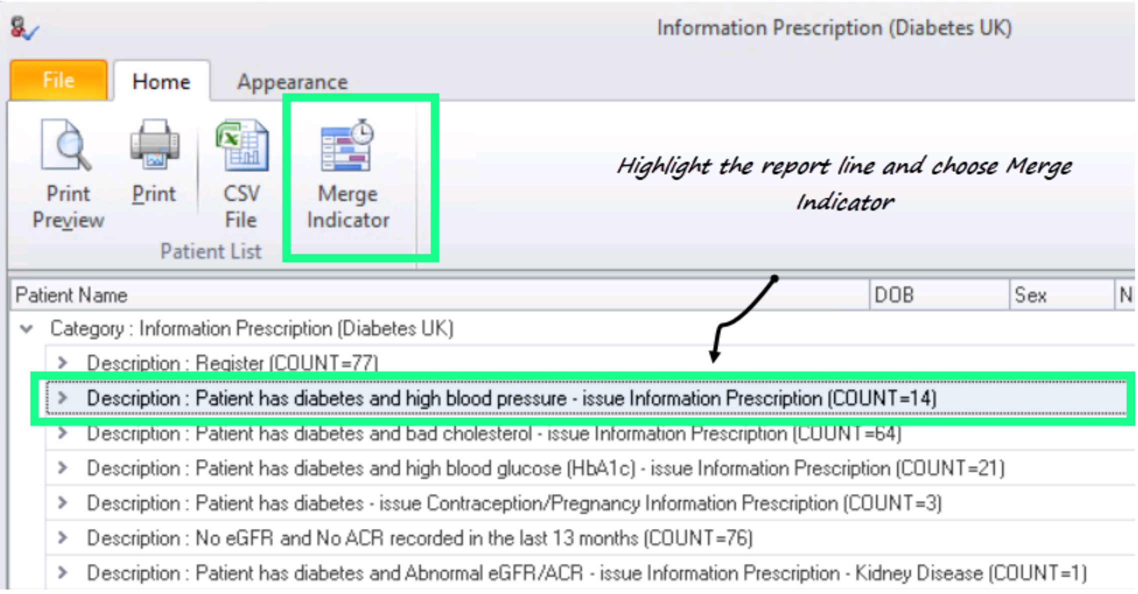
> **Note** - You must do this for each new letter template you create.

Sending a Group of Patients a Letter

To send a letter to a group of patients.

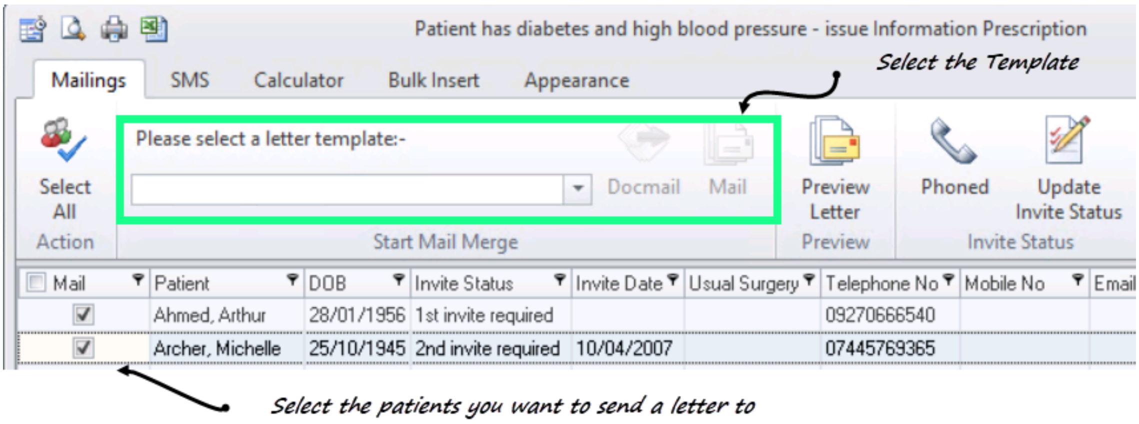
1. From Practice Lists, select the report.
2. Highlight the group you want to send a letter to and select **Merge Indicator**.

> **Note** - Depending on the line you highlight you may see Merge Indicator or Merge Category.



Reports

3. The Mailings screen displays.
4. Select the patients you want to send a letter to and select a template.



5. Click **Mail**.