



Managing Allergic Triggers in Asthma

A toolkit to identify and review patients at risk of poor outcomes

Installation Guide

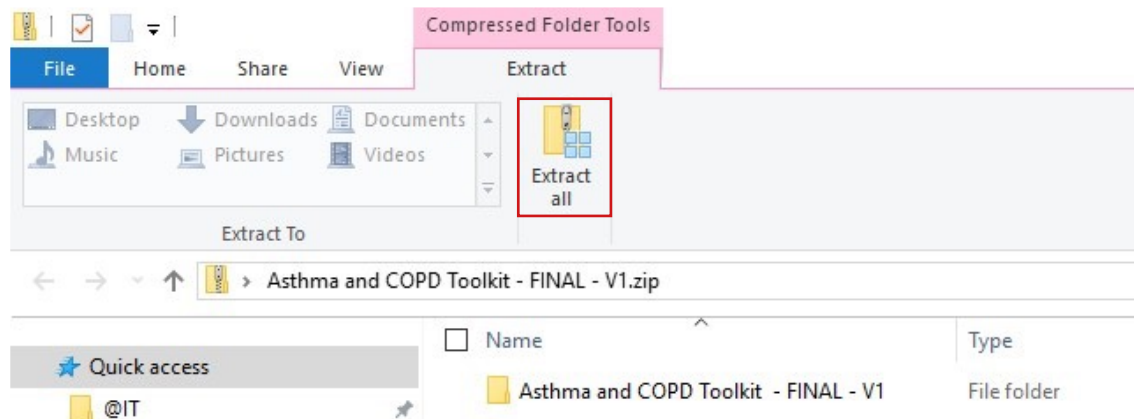
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Import Process

Save & Extract ZIP folder

1. You will have downloaded or been provided with the ZIP folder which contains the EMIS files required.
2. Save the ZIP folder named 'Managing allergic triggers in asthma - EMIS files' either to your computer desktop or your documents folder.
3. Click Extract.
4. Select Extract All.



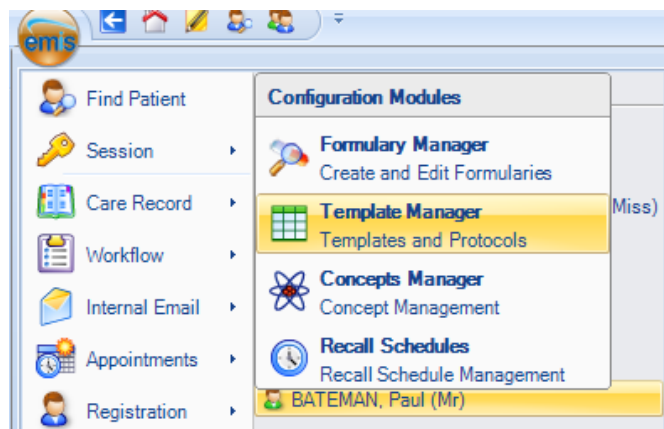
5. Click Extract.
6. A new folder will have been created and displayed.
7. Close folder.

Create Protocol & Concept Folders

Depending on which version of EMIS you have, please either follow the instructions below for Template Manager [A] or Resource Publisher [B].

A. If you have Template Manager

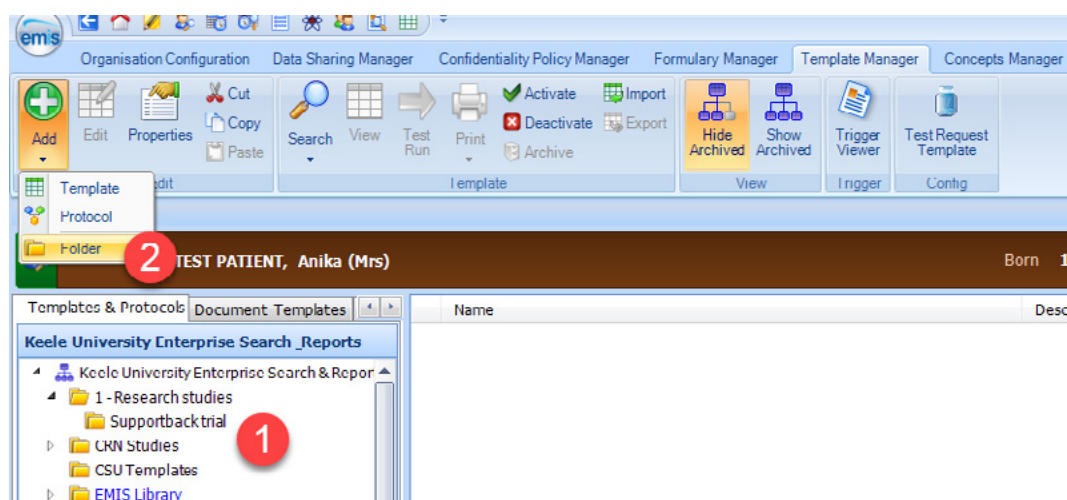
1. Access Template Manager by clicking on the EMIS globe in the top left-hand corner, then select Configuration then Template Manager. You will now need to create some folders in which to save and store the imported files later on.



Creating the protocol folder

You need to create a folder to save the protocols in.

1. From the window pane on the left (similar to Windows Explorer) you will see all of the folders listed currently on the practice system under Templates and Protocols (see image below). From this list, select the most appropriate place to create the 'Allergic Triggers in Asthma' toolkit folder. You can either create a new folder, or click to select an existing folder and create a sub-folder to contain the protocols.
2. Then in the top left corner, select Add, then Folder.

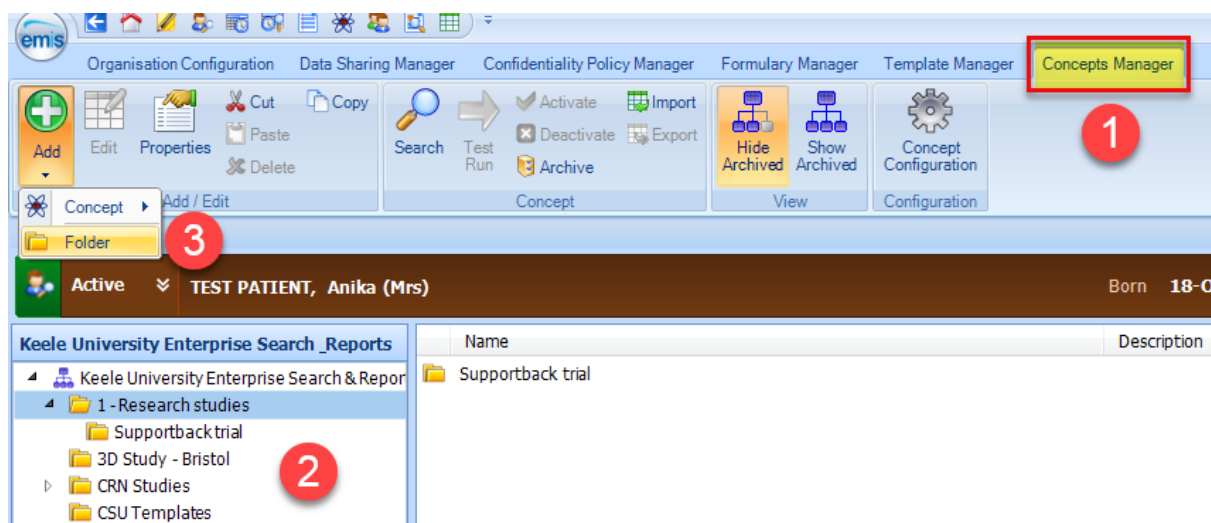


3. Complete the Add folder window by typing in the folder name you wish to create. You can use any name, but we will use 'Allergic Triggers in Asthma Toolkit'. Then click OK.

Creating the concepts folder

You then need to create a folder to save the concepts in.

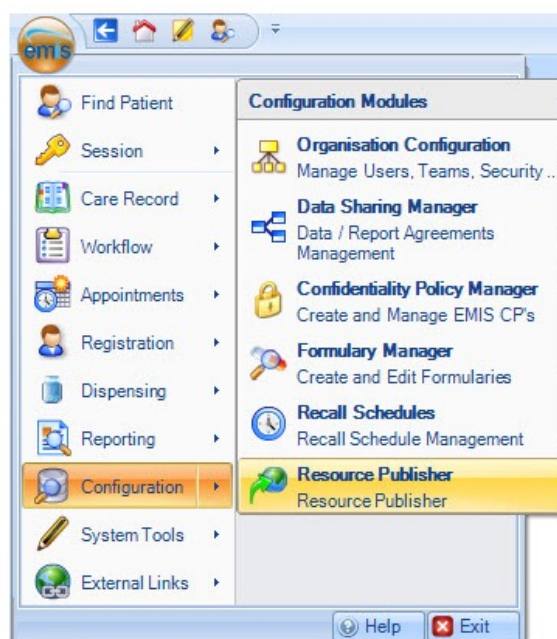
1. From the tabs across the top, select the Concepts Manager tab as highlighted in the image below.



2. You will then see in the pane below all of the folders listed on the practice system for Concepts Manager. From this list, select the most appropriate place / folder to create the 'Allergic Triggers in Asthma Toolkit' folder.
3. Then from the icons shown above, select Add then Folder. Complete the Add folder box as you have done in the previous steps for the protocol folder.

B. If you have Resource Publisher

1. Access Resource Publisher by clicking on the EMIS globe in the top left-hand corner, then select Configuration, then select Resource Publisher.



Creating the protocol folder

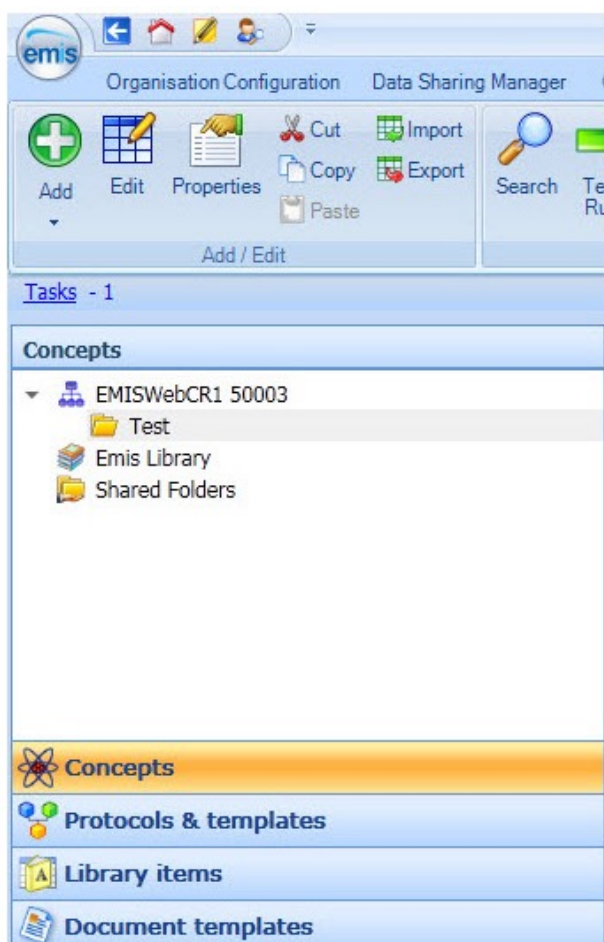
You need to create a folder to save the protocols in.

1. From the tabs on the left-hand side, select the Protocols & templates tab (the one underneath Concepts).
2. You will then see in the pane above all of the folders listed on the practice system for Concepts Manager. From this list, select the most appropriate place / folder to create the 'Allergic Triggers in Asthma Toolkit' folder.
3. Then from the icons above select Add then Folder. Complete the Add folder window by typing in the folder name you wish to create. In this case, we're calling it 'Allergic Triggers in Asthma Toolkit'. Then click OK.
4. Click on the Refresh button on the ribbon and the folder will appear.

Creating the concepts folder

You then need to create a folder to save the concepts in.

1. From the tabs on the left-hand side, select the Concepts tab as indicated in the image below.
2. You will then see in the pane above, all of the folders listed on the practice system for Concepts Manager. From this list, select the most appropriate place / folder to create the 'Allergic Triggers in Asthma Toolkit' folder.
3. Then from the icons above select Add, then select Folder. Complete the Add folder window by typing in the folder name you wish to create. You can use any name, but we will use 'Allergic Triggers in Asthma Toolkit'. Then click OK.
4. Click on the Refresh button on the ribbon and the folder will appear.



Importing Protocol Alerts into EMIS Web

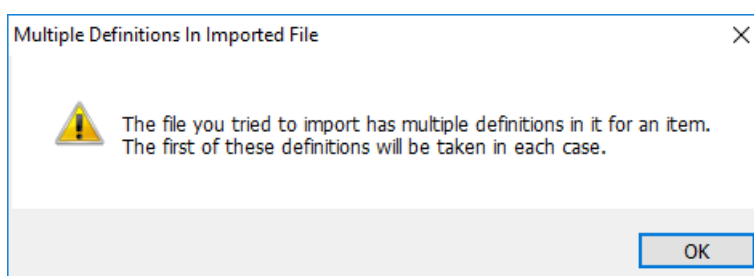
You now need to import the protocols into the folders you have created for 'Allergic Triggers in Asthma Toolkit' (or whatever name you have chosen). Depending on your version of EMIS, please follow the instructions below for Template Manager [A] below or Resource Publisher [B].

A. If you have Template Manager

1. From the tabs at the top select Template Manager.
2. Then select the 'Allergic Triggers in Asthma Toolkit' folder (or whatever name you chose) that you created previously.
3. Then click the 'Import' button. This then brings up the explorer window. Use this to locate the folder to which you originally saved the EMIS files.
4. Select the first protocol file you have been provided with (eg. 'Asthma diagnosis in L12M but no Asthma Action Plan, documented triggers etc.xml'). Click Open.
5. You will then be asked to select the folder in which to save the EMIS concepts to.
6. Locate the folder you created earlier and click OK.
7. If prompted to replace existing concepts with those being imported please select, Yes. This will only happen if you already have some concepts installed for existing protocols on your system.
8. The protocol should then finish importing and be displayed in the window / 'Allergic Triggers in Asthma Toolkit' protocol folder.

B. If you have Resource Publisher

1. From the tabs on the left-hand side select Protocols and Templates
2. Then select the 'Allergic Triggers in Asthma Toolkit' folder you created previously.
3. Then click the 'Import' button on the ribbon above.
4. Select the 'Managing allergic triggers in asthma' file you have been provided with (note: the filename maybe slightly different, depending on the version), click open.
5. The Import resources window will then appear
6. Click on the Browse button and select the 'Allergic Triggers in Asthma Toolkit' concepts folder and click OK.
7. Then click on Import. The Properties window will appear. Click Save.
If you are then presented with a Dependant Resources window click Activate All. You may also receive a message, that some concepts already exist and will be overwritten by the import. Click Yes.
8. A prompt will appear asking where you wish to save the concepts, select the folder you created previously. Click OK.
9. The following message will appear. Click OK.

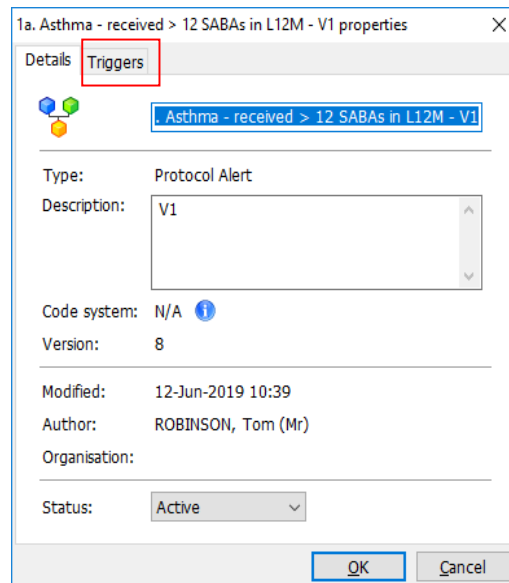


10. Repeat all above steps until all resources are imported.

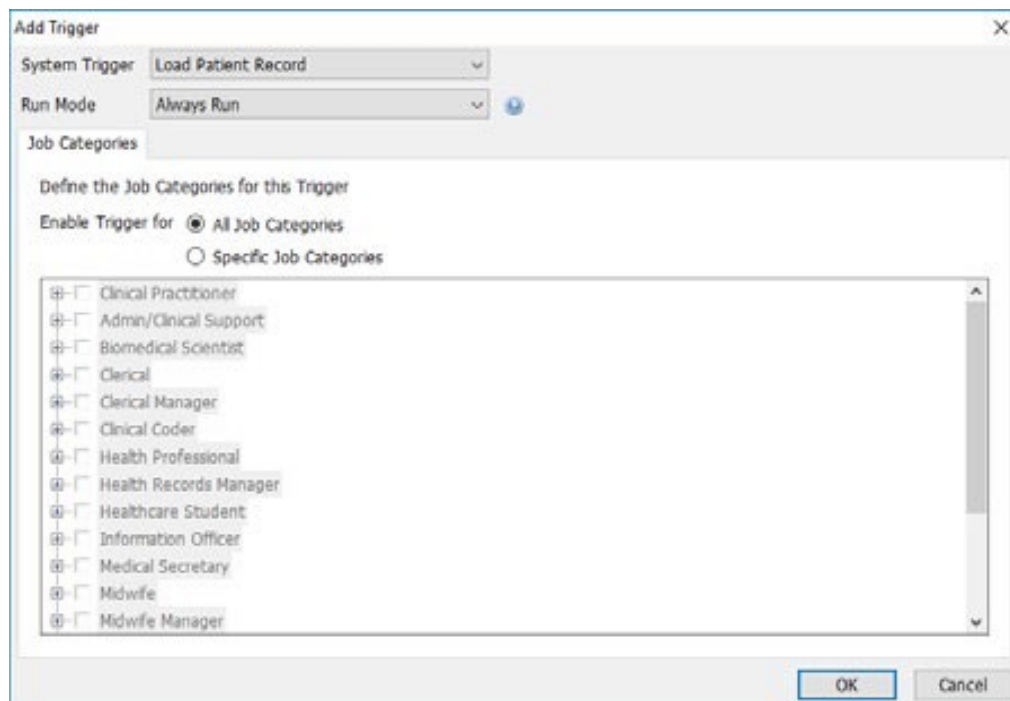
Adding Triggers

A. If you have Template Manager

1. Once you have imported all of the protocols you can now proceed to setting the triggers for each of them.
2. Right click a protocol. Select Properties. Select Triggers.



3. Click Add.
4. Select System Trigger as Load Patient Record.
5. Select Run Mode as Always Run.



6. Click OK and Click Add.
7. Select System Trigger as Update Patient Record
8. Select Run Mode as Always Run. Click OK.

The trigger is now set. Repeat the above process for other protocols as needed.

B. If you have Resource Publisher

1. Once you have imported all of the protocols you can now proceed to setting the triggers for each of them
2. Click on the protocol to select it, then click the 'Manage Triggers' button on the ribbon at the top of the screen.



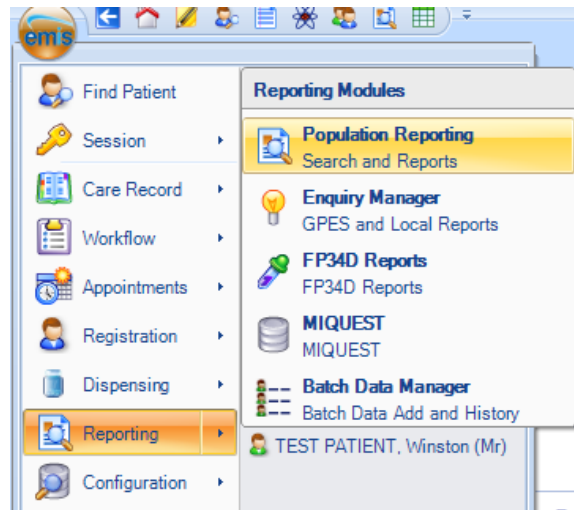
3. Click Add.
4. Select System Trigger as Load Patient Record.
5. Select Run Mode as Always Run.
6. Click OK and Click Add.
7. Select System Trigger as Update Patient Record
8. Select Run Mode as Always Run. Click OK.

The trigger is now set. Repeat the above process for other protocols as needed. To make the resource available, simply select it, then click Activate/Complete on the ribbon.

Create Search and Report folder

You will now need to create a folder in which to save the searches and reports in.

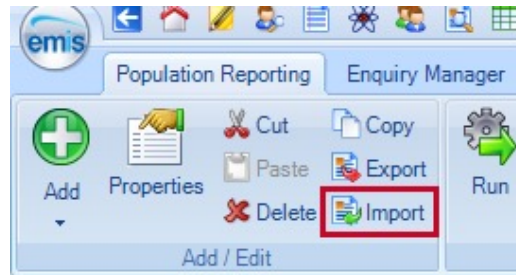
1. Access Population Reporting by clicking on the EMIS globe in the top left-hand corner, then select Reporting then Population Reporting.



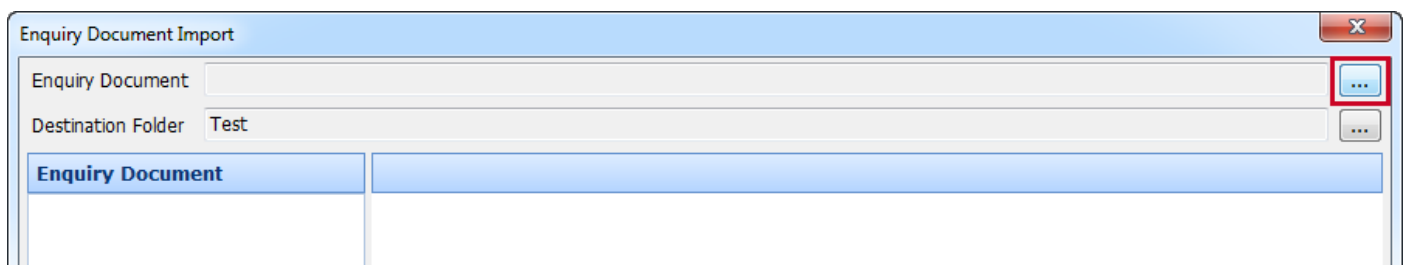
2. From the window pane on the left (similar to Windows Explorer) you will see all of the folders listed currently on the practice system under Population Reporting. From this list, select the most appropriate place to create the folder.
3. Click to select the folder in which to save.
4. Then in the top left corner, on the ribbon of icons, select Add then Folder.

Import search folder

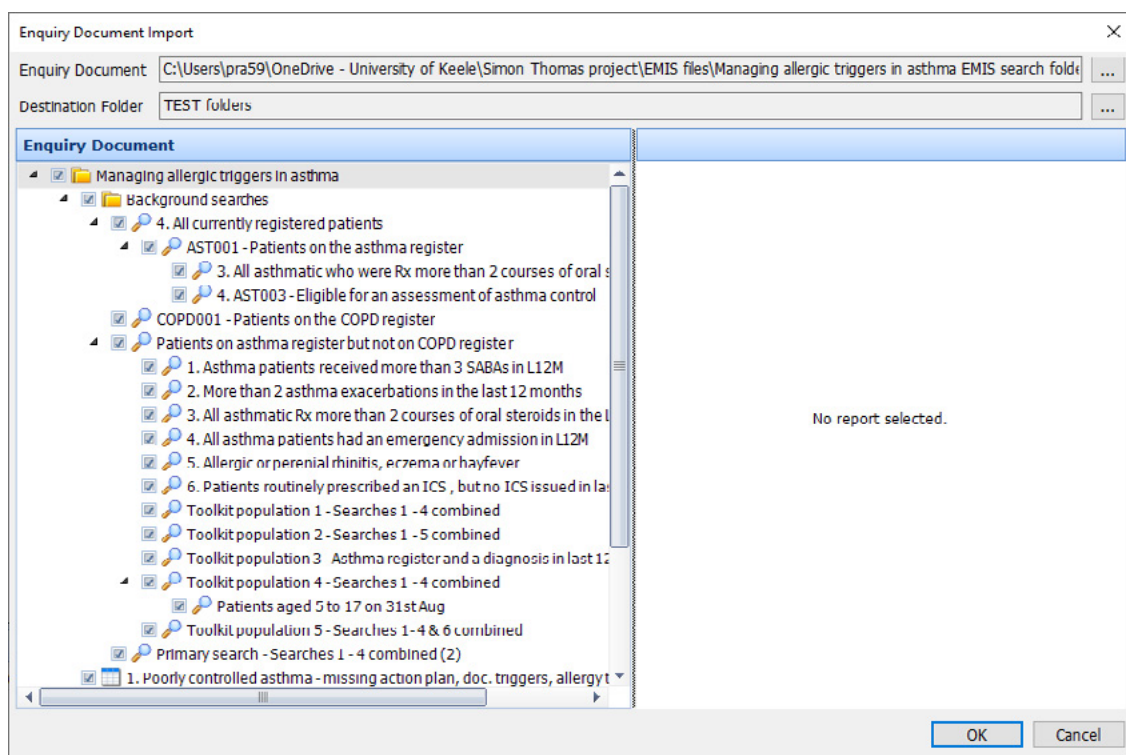
1. Access Population Reporting by clicking on the EMIS globe in the top left-hand corner, then select Reporting then Population Reporting.
2. From the list of folders, find and open the folder you created earlier. Then from the icons on the top ribbon, click on Import.



3. In the Enquiry Document Import window, click on the "... " icon at the top right as indicated in the screenshot below.



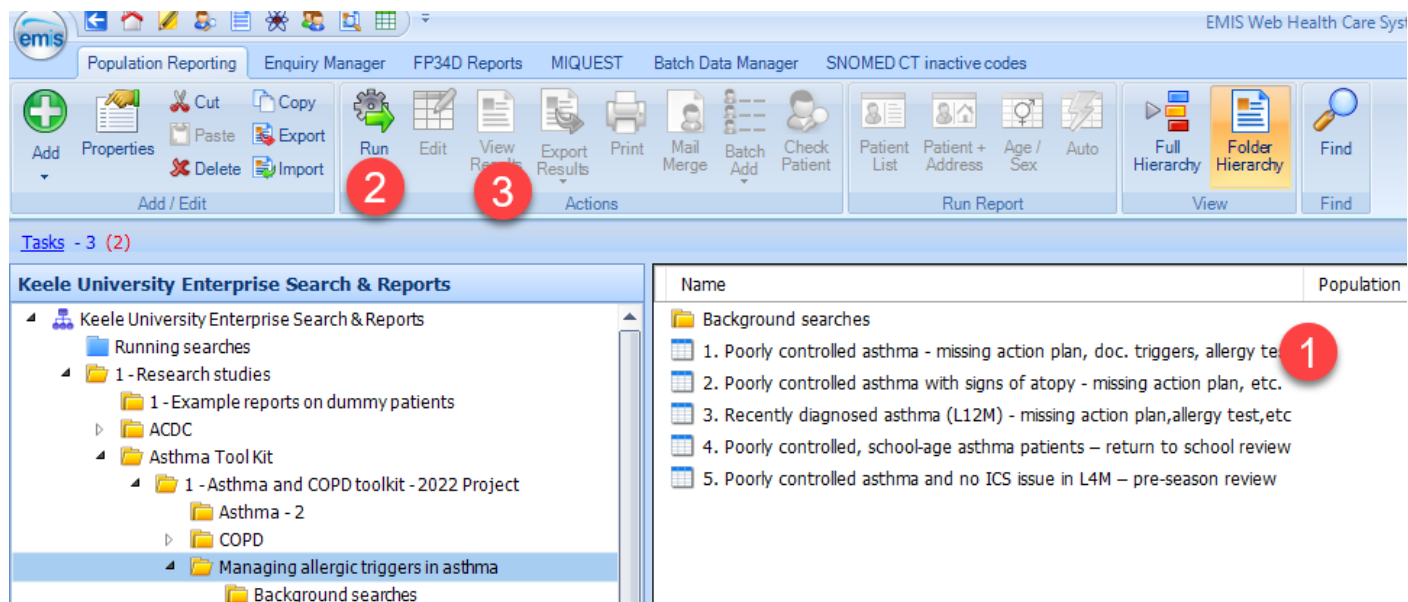
4. Then in the Open window, find the search and report folder file, select and click Open.
5. The folder and the searches should then be shown in the Enquiry Document Import window, an example is shown below. Click on OK.



6. The folder containing the three search and reports should now be visible in the search window ready to run.

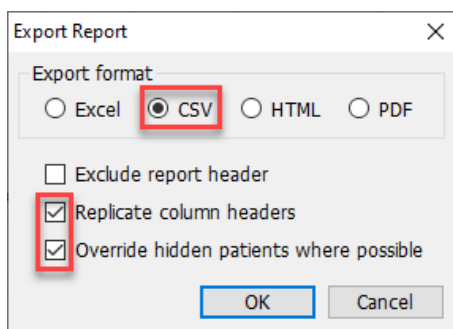
Running the EMIS Reports

1. Click to select the report you wish to run.
2. Click Run, then click Yes. Once the report has completed running, click to select the report again then ...
3. Click View Results.



You will then be presented with the table of results. Click on Export.

This opens the Export Report window, then make the selections as shown below then click OK.

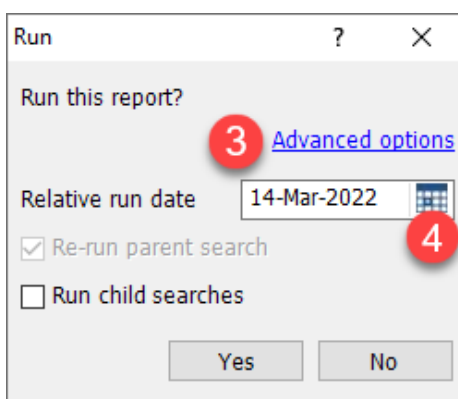
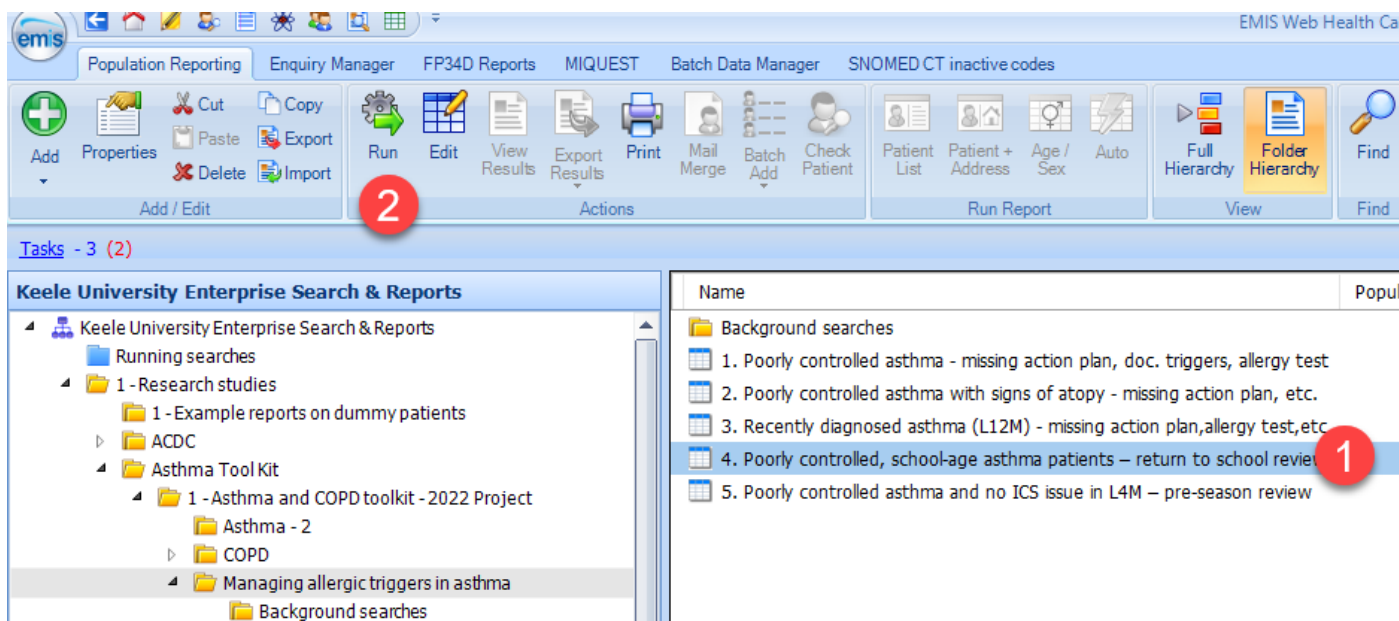


4. You will then be presented with the Save As window, select a destination where to save the file.
5. Edit the filename if you wish and click Save.
6. In the Report Viewer screen, click Close on the top ribbon to return to the search window.

Note: Repeat the process for the other reports as necessary. However, Report 4 (4. Poorly controlled, school-age asthma patients – return to school review) requires an extra step, please see important information below.

When running report 4, it is essential that you set a relative run date on the search and reports.

1. When you select the report to run [1] and click Run [2] the Run window will open (see image above).
2. Click on Advanced options [3] to display the hidden further options.
3. In the Relative run date box [4], change the date to 31st Aug for the year you are running it for, then click Yes.



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Developed in partnership between the Midlands Practice Pharmacy Network and Prescribing Decision Support Ltd at the Centre for Medicines Optimisation, Keele University. Both parties reserve the right to update and change the Managing Allergic Triggers in Asthma Toolkit at any time in order to address changes in clinical guidance and best practice, improve functionality and reflect changing user and business needs. Both parties also reserve the right to withdraw the Toolkit if and when its content is out of date and no longer consistent with clinical guidance.