

Extended Access Training Guides

Support: mbpcc.extendedaccess@nhs.net

Reporting Management

Introduction

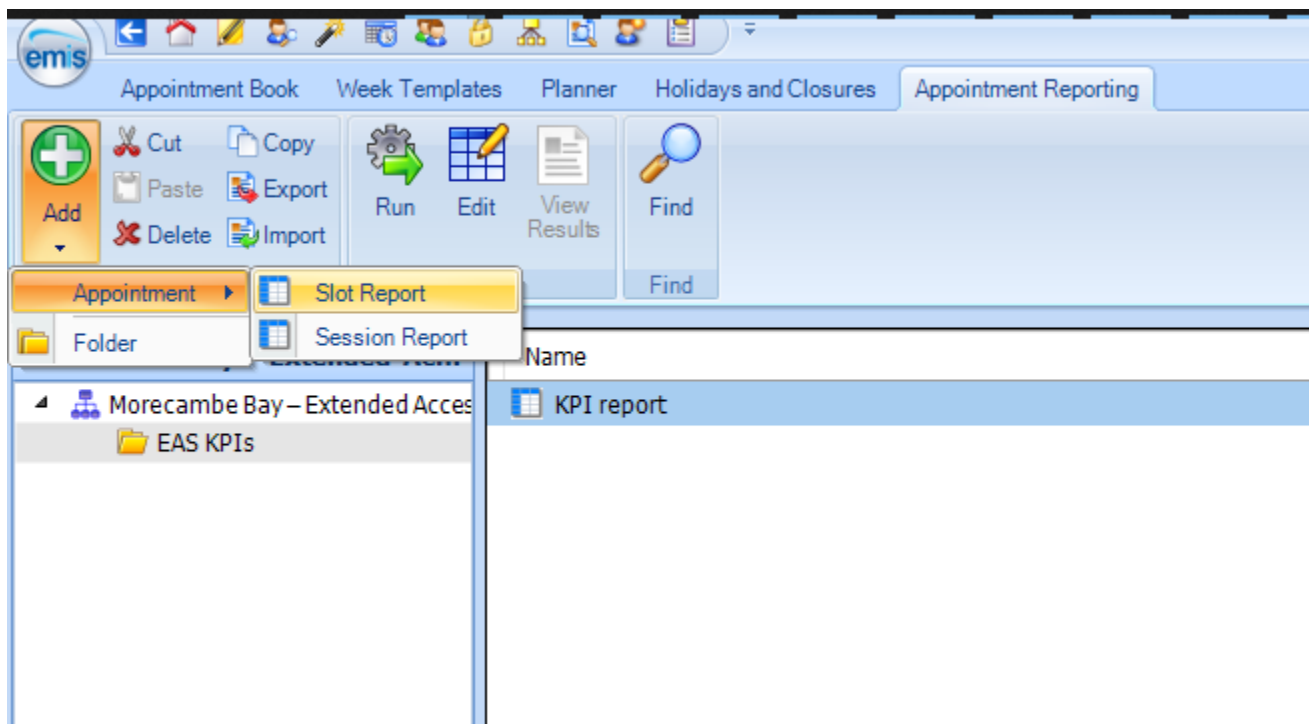
If you are hosting appointments in your own EMIS system then it is a condition of your subcontract that you provide reports to us that are needed to support the KPI reporting to the CCG. This guide explains the report structure you need to setup and how and when to submit your data to us.

Configuration

This is all done within Appointment Reporting which can be accessed through your appointment book.

You will need to define a new slot report as per the following screenshots.

Click Add->Appointment->Slot Report





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Appointment Slot Report

Appointment report

- Properties
- Filter Data
- Report Format
- Schedule

Details

Name: Y**** KPI report

Description:

Name your report as:
<practice code> KPI report

Save and Close Save and Run Cancel

Appointment Slot Report

Appointment report

- Properties
- Filter Data
- Report Format
- Schedule

Define Appointment Properties for Report below and then 'Report Format' to define Report Output

the **Appointment Date** is last month [Change](#) ↑ ↓ ✕

Add Filter ▾

Add a filter for appointment date in on last month.

Save and Close Save and Run Cancel

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On the Report Format page, add the following rows. Please take care to add the rows in the specific order shown in the screenshot below. We will be automating the processing which will rely on data being in the expected column!

Appointment Slot Report

Appointment report

Properties ☒

Filter Data

Report Format

Schedule

Create Report by defining Column and Row Data

Columns

Add Column ▾

Rows

Appointment Date	Banded by Appointment Date	Change ▾	↓	×
Appointment Time	Banded by Appointment Time	Change ▾	↑	↓
Name of the Location of the Session	Banded by Name of the Location of the Session		↑	↓
Slot Duration	Banded by Slot Duration	Change ▾	↑	↓
Session's Session Category	Banded by Session's Session Category	Change ▾	↑	↓
Slot Type	Banded by Slot Type	Change ▾	↑	↓
Availability	Banded by Availability	Change ▾	↑	↓
DNA	Banded by DNA	Change ▾	↑	↓
External Booking Organisation	Banded by External Booking Organisation		↑	×

Add row ▾

Table Options

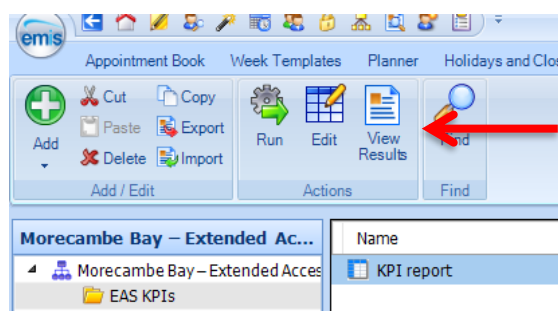
Save and Close Save and Run Cancel

Once you have done all of the above click Save and Close.

Schedule

You will need to run the report after the last day of each month. Simply select your report and click Run on the toolbar. Please submit your report by the first Friday after the end of the month.

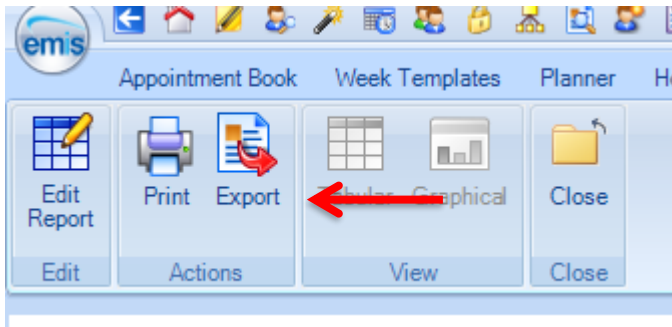
Exporting and submitting



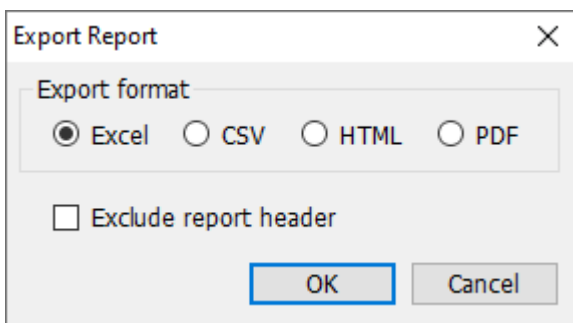
Once the report has run, click View Results on the toolbar.



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You will be able to view the results to sense check. Once happy, click Export on the toolbar.



Leave the export format as Excel then click OK and save to your computer.

Email the excel format file to support using the address at the top of this guide.

Remember that your report must be submitted before the first Friday after the end of a month.