Extended Access Training Guides

Support: mbpcc.extendedaccess@nhs.net

Reporting Management
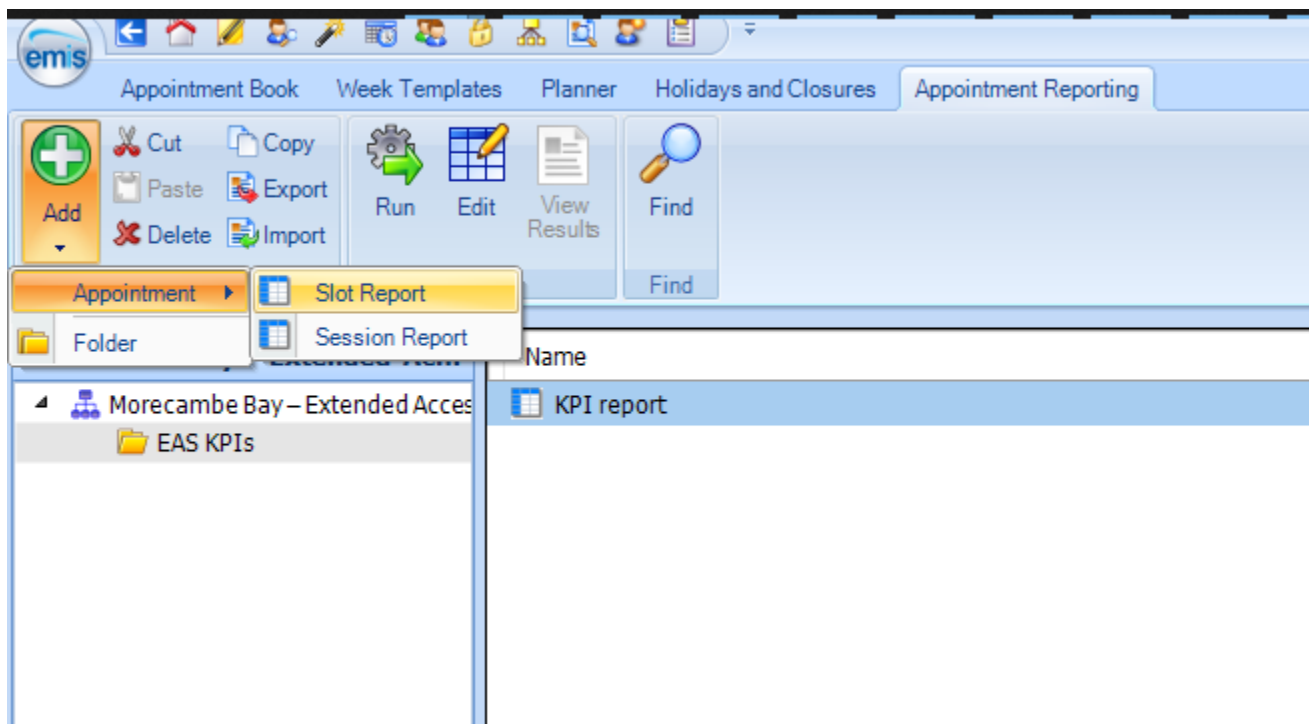
Introduction

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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Name your report as:
<practice code> KPI report

Add a filter for appointment date in on last month.

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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!
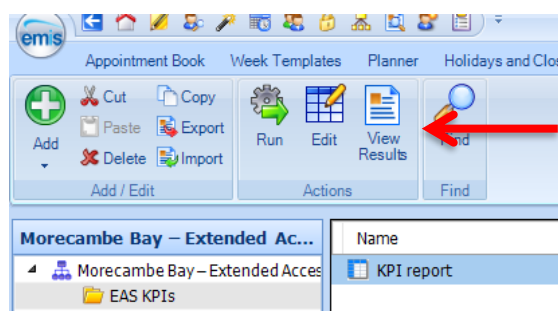

Once you have done all of the above click Save and Close.

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.
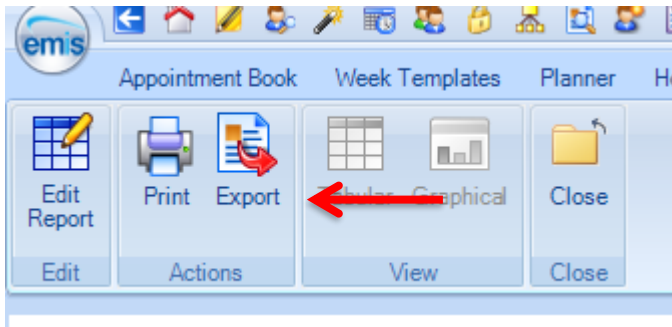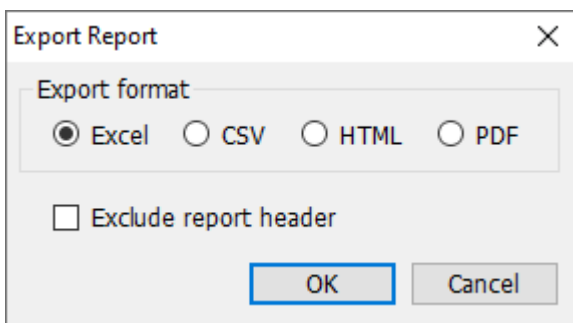
Exporting and submitting

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.