CASE STUDY

Heartbeat Alliance

Yorkshire

Heartbeat Alliance is dedicated to enhancing local patient care through business development and coordination, focusing on identifying opportunities for improved collaboration and efficiency. One such initiative is 'Better Access', which offers patient appointments outside regular hours, including evenings (6:30 - 8:00 pm) and Saturday mornings.

To assess the effectiveness of this service, the Clinical Service Manager enlisted the NECS Primary Care Data Quality (PCDQ) Team for help. The objective was to generate comprehensive appointment reports using SystmOne and EMIS Web clinical systems. These reports were crucial for demonstrating the service's impact and value.

The PCDQ Team supported the creation of these reports to ensure accurate monthly statistics, highlighting the advantages and effectiveness of the 'Better Access' service.

The challenge

Initial Setup and Collaboration: Heartbeat Alliance needed assistance with generating comprehensive appointment reports. To address this, two training sessions were arranged via Microsoft Teams, where Heartbeat Alliance shared their clinical systems with the PCDQ Team for collaborative problem-solving.

Existing Report Limitations: Heartbeat Alliance had already developed some appointment reports in their clinical systems, but these reports did not display expected results.

SystmOne Reports: During the first training session, the focus was on exploring and re-purposing existing reports within SystmOne. The challenge was to optimise these reports to capture all relevant data for effective analysis.

EMIS Reports: The second training session addressed functionality with EMIS Web. The goal was to transition from using the standard Appointment Reporting area to the more versatile Population Reporting area, which was better suited for including all necessary details in the reports.

Outcomes

SystmOne:

1. A TPP pre-built report was utilised to save time and testing which showed all unused appointment slots utilisation for the previous months.

2. A custom-built report was required to be built to include all registration types, statuses, appointment sites, and details that was required.

Both reports were exported as CSV files, transferred to Excel, and combined into a pivot table for the monthly returns.

EMIS:

The original appointment reports did not display external organisation details, like practice names. The PCDQ Team suggested using EMIS population reporting to include necessary details, such as available slot types and registration information. The Auto Report function streamlined the process by adding criteria like location and user

types. Deceased or deducted was included within this selection. This was necessary as any patient who had either died or left but attended Better Access in the previous month would need to be included.

Overall, the outcome of this case study was highly positive for Heartbeat Alliance. The combination of enhanced data accuracy, increased trust, knowledge increase and greater confidence in using reporting tools resulted in a more efficient and effective reporting process, ultimately leading to better organisational outcomes and satisfied stakeholders.

Successful Monthly Returns:

The accurate and comprehensive data generated by the combined use of SystmOne and EMIS reports allowed Heartbeat Alliance to successfully complete their monthly returns, meeting their internal and external reporting requirements.

Increased Trust and Satisfaction:

Heartbeat Alliance was reassured by the effective collaboration with the PCDQ Team, knowing that they could depend on their expertise to navigate complex reporting challenges. This trust translated into a strong working relationship and a positive perception of the support provided by NECS.

Confidence in Future Reporting:

Having successfully navigated the challenges of report creation and data extraction, Heartbeat Alliance staff felt more confident in their ability to use SystmOne and EMIS for future reporting needs. They gained hands-on experience and insight into the advanced features of these systems, particularly the benefits of using automated reports and detailed search criteria.

Better Decision-Making:

With more accurate and comprehensive data at their disposal, Heartbeat Alliance could make better-informed decisions regarding their appointment management, resource allocation, and overall service delivery. The reports helped identify trends and gaps, contributing to more strategic planning and operational improvements.

"I have had the privilege of working with NECS training team, specifically Henny and Tawnie. Having a certain degree of knowledge in building reports and interpreting results to then requiring extraction of additional information, I sought the expert help of Henny who understood my starting point and what I needed. We worked together on Teams to find the solution, sometimes through trial and error. Henny's knowledge of report building in both EMIS and SystmOne is second to none and a fabulous skill to offer. Thank you".

Clinical Service Manager, Heartbeat Alliance