

Introducing the PCIT Diary Recall Support Process

A smarter way to manage patient recalls in EMIS Web

Introduction

Why we're here?

- We are introducing a new Diary Entry Recall Feature to assist practices with specific recall activities across a number of clinical and administrative areas.

What are we covering?

- The Challenge
- Where the resources fit
- What they provide
- The overall process
- Detail of what is covered
- How to get started
- Training your practice team
- Finding the resources
- Ongoing Support & Next Steps

The Challenge

- Following customer feedback we have recognised a gap between existing PCIT recall resources and the operational needs of our customers.
- Not every practice has capacity or wants to implement the full OneRecall solution
 - Risk of duplication or missed recalls
- Every practice wants different types or levels of recall
- Cluttered diaries from inconsistent processes
- Different staff complete parts of reviews with no unified 'all done' marker

Where does it fit?

- Every practice has a different requirement and level of maturity of recall processes depending on
 - Capacity
 - Population covered
 - Skills of team members
- PCIT recognised a gap between our existing resources and have subsequently provided **Optional** new resources to support practices in developing and improving their recall processes.
- CQC Navigator – compliance recalls
- QOF Navigator – QOF-only recalls
- **Diary Recall support processes – flexible menu**
- Full OneRecall – comprehensive, modular, month-of-birth process

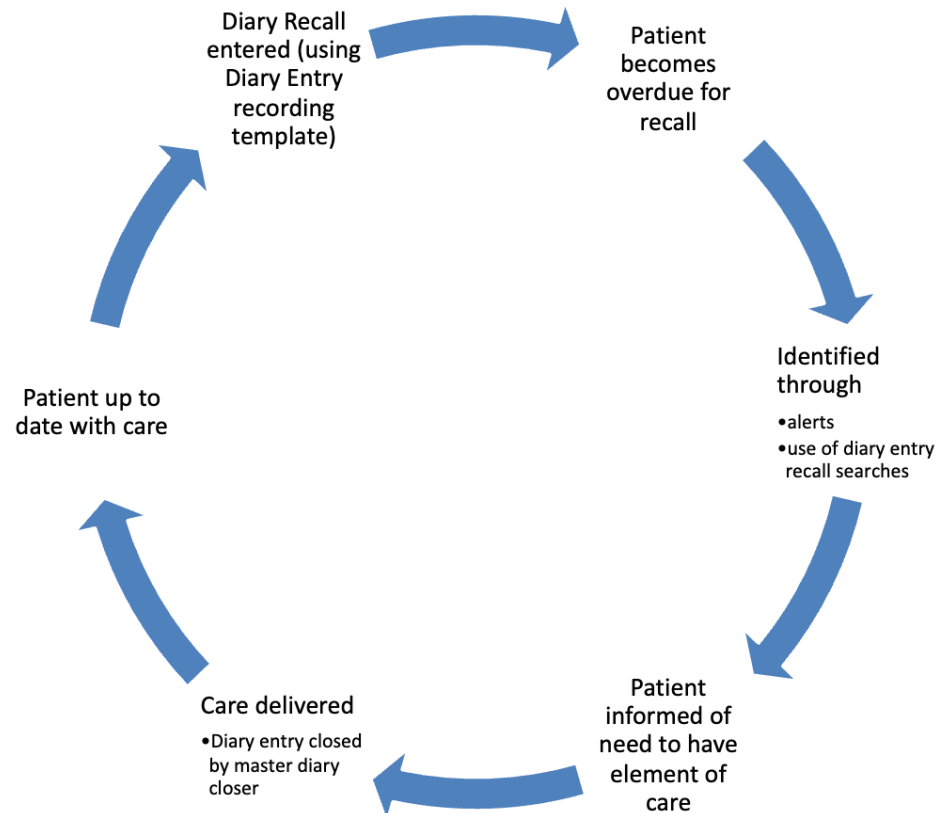
What do the Diary Recall support processes provide?

- Flexible menu of recall options
- Work allocated by staff role & clinical area
- Fully integrated with existing PCIT templates
- Master Diary Closer keeps diaries clean
- Standardised SNOMED codes for consistency

The Diary Entry Recall Process and resources



PCIT Diary Entry Recall Support Resources



- The PCIT Diary Entry Recall Support Resources provide a complete framework for managing patient recalls in EMIS Web.
- The following resources support the process:
 1. [Diary Entry Recording Template \(TM00209\)](#)
 2. [OneRecall Diary Searches](#)
 3. [Diary Entry Due Alert \(HP427\)](#)
 4. [Master Diary Closer \(PT00410\)](#)

PCIT Diary Entry Recall Support Resources

Diary Entry Recording Template (TM00209)

Purpose:

- Provides a single, standardised format for recording all diary recalls.

Features:

- Two modes: Quick pages (date only) and Full pages (date + notes).
- Categorised sections for efficient classification:
- Long-Term Conditions (both QOF and non-QOF) / Diagnostics / Generic follow-up / Mental health / Women's health & contraception / Injections & immunisations / observations & admin / Medicines actions / Blood tests

Benefit:

- Ensures consistency, easy navigation, and accurate recall logging across all clinical areas.

OneRecall Diary Searches

Purpose:

- Provides search functions to track and manage recalls effectively.

Features:

- Finds overdue and upcoming diary entries, with results grouped by clinical area and staff role.
- Preparation search: Identifies recalls that are >13 months overdue.
- All Recall Diary Entries: Generates a complete baseline view of outstanding recalls.

Benefit:

- Enables proactive workload management and ensures no recalls are missed.

Diary Entry Due Alert (HP427)

Purpose:

- Delivers real-time prompts during patient record reviews.

Features:

- Alerts users to outstanding recalls as soon as a patient record is opened.
- Displays recall category, type, and due date for clarity.

Benefit:

- Immediate visibility of recalls during clinical encounters, reducing the chance of omissions.

Master Diary Closer (PT00410)

Purpose:

- Automates the closure of completed diary entries.

Features:

- Automatically closes recalls when relevant evidence is detected (e.g. coded test results, reviews).
- Prompts user input when recalls are non-specific or vague (e.g. "Change of medication").
- Records every closure in Care History for full auditability.

Benefit:

- Saves time, reduces manual errors, and maintains a robust audit trail.

What types of recall are included?



What types of recall are included?

Clinician –
Chronic Disease
Review (National
Contract)

Clinician –
Chronic Disease
Review (Non-
QOF)

Diagnostics –
Imaging &
Monitoring

Generic follow up

Mental Health –
GP or MH Nurse

Nurse - Womens
health &
contraception

Nurse/HCA -
Injections and
Immunisations

Nurse/HCA -
Observations or
Admin

Pharmacist –
Medication review

Phlebotomist -
Blood test

Clinician – Chronic Disease Review (National Contract)

AF

Asthma

COPD

CHD

CVA/TIA

Dementia

Diabetes

Heart failure

Hypertension

Learning
disabilities

Clinician – Chronic Disease Review (Non-QOF)

Cancer

CKD

Epilepsy

PVD

Rheumatoid

Osteoporosis

CKD

At risk of
diabetes

Coeliac
disease

Care plan

In house
dermatology
follow up

Inclisiran
indicated

Diagnostics – Imaging & Monitoring

Echocardiogram

Ultrasound

CXR

Colonoscopy

DEXA

Audiogram

Mammogram

FIB-4 score

NAFLD score

Ultrasound
elastography of
the liver

Biopsy
administration

Generic follow up

Follow-up
encounter

Follow-up

Mental Health – GP or MH Nurse

Depression
review

Mental health
review

ADHD review

Mild cognitive
impairment
review

Nurse – Womens health & contraception

Cervical smear

HRT

Oral
Contraception

Removal of
IUD

Removal of
IUS

Subcutaneous
contraceptive
change

Depot
contraceptive

Vaginal
pessary
change

Nurse/HCA - Injections and Immunisations

B12

Denosumab

GNRH
injection/implant

Generic
subcutaneous
injection

Intramuscular
injection

Neuroleptic
injection

Vitamin D

Hep A booster

Herpes zoster
vaccination

Pneumococcal
vaccination

Nurse/HCA – Observations or Admin

Blood
pressure

Raised BP
follow up

BMI

Doppler
ultrasound

ECG

NHS Health
check follow
up

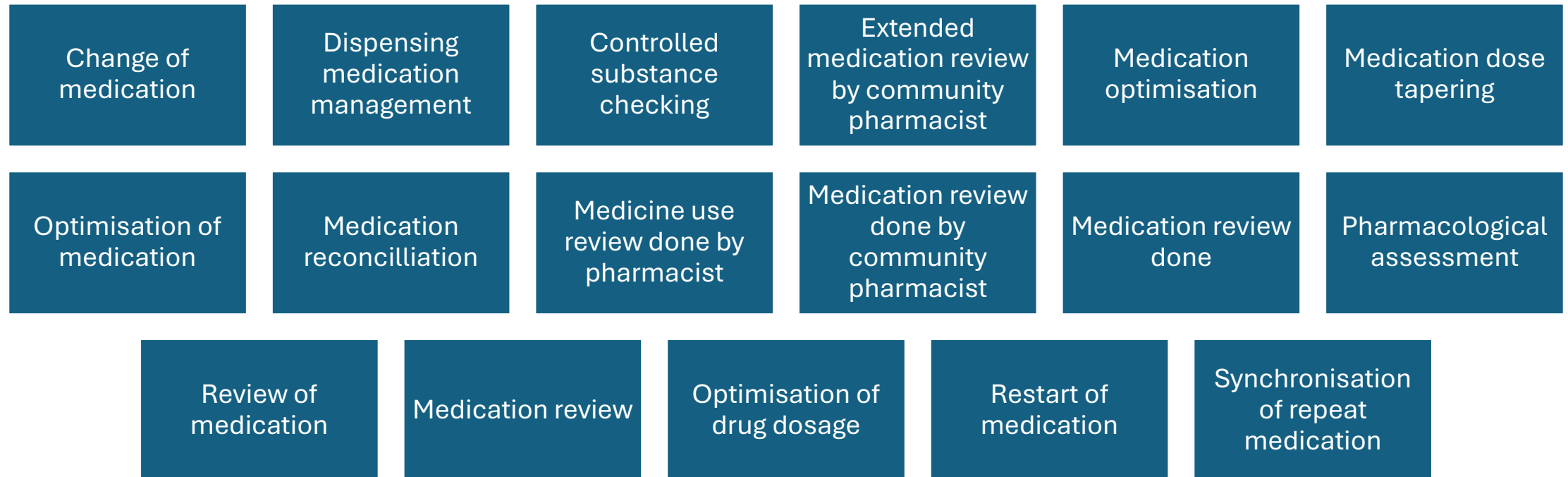
Pulse rate

Spirometry

Catheter
attention

Wound care

Pharmacist – Medication review



Phlebotomist – Blood test

Blood test due	Bone profile	CA125	Calcium	CRP	ESR	CEA	FOB
Glucose	NOAC/DOAC monitoring	Fructosamine	Folate	FBC	HbA1c	Phosphate	High risk drug monitoring
Serum lipids	Lithium	Magnesium	Vitamin D	B12	Urine dipstick	ACR	Urine culture
Calcium	LFT	PSA	Renal function	TFTs	Electrophoresis	Warfarin	Testosterone
		Ferritin	Urate	Prolactin	PTH		

Getting Started

How to get going

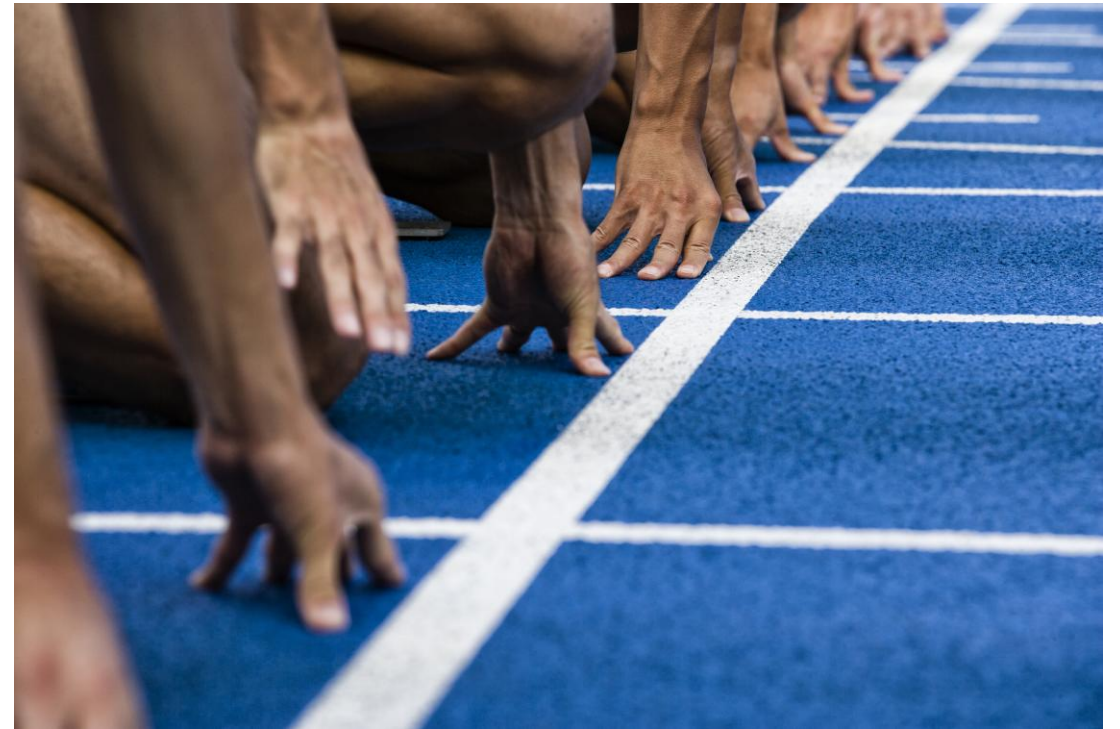


Getting Started Process Overview

The Diary Entry Recall Support process moves from;

- **Step 1:** Planning and preparation.
- **Step 2:** Resource setup with PCIT support
- **Step 3:** One-off clean-up of historical recalls.
- **Step 4:** Sustainable ongoing workflow.

Together, these steps ensure that recalls are consistent, auditable, and effectively managed across the practice.



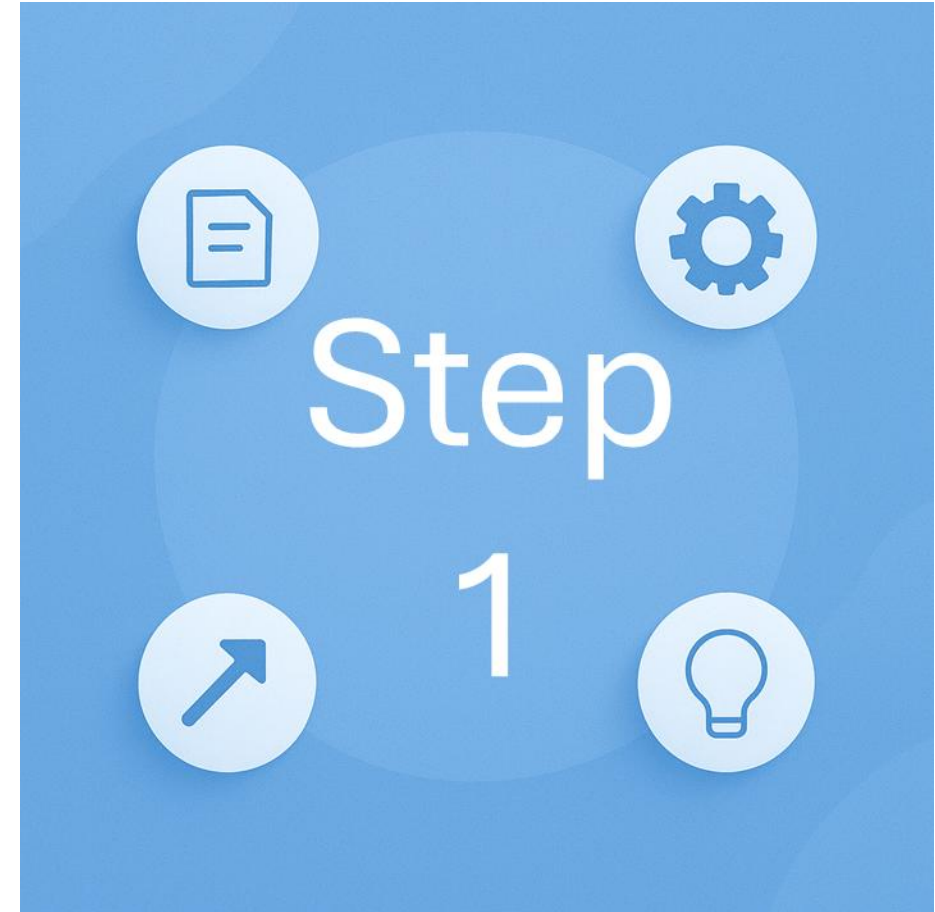
Getting Started

Step 1 – Preparing Your Practice

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- **Review current recall process:** Understand how your practice currently manages patient recalls.
- **Set priorities:** Decide which areas to focus on first
- **Assign roles:** Allocate responsibility across the team (GPs, nurses, pharmacists, HCAs, admin) to manage and act on recalls.

Goal: Establish a clear, agreed approach before implementation.



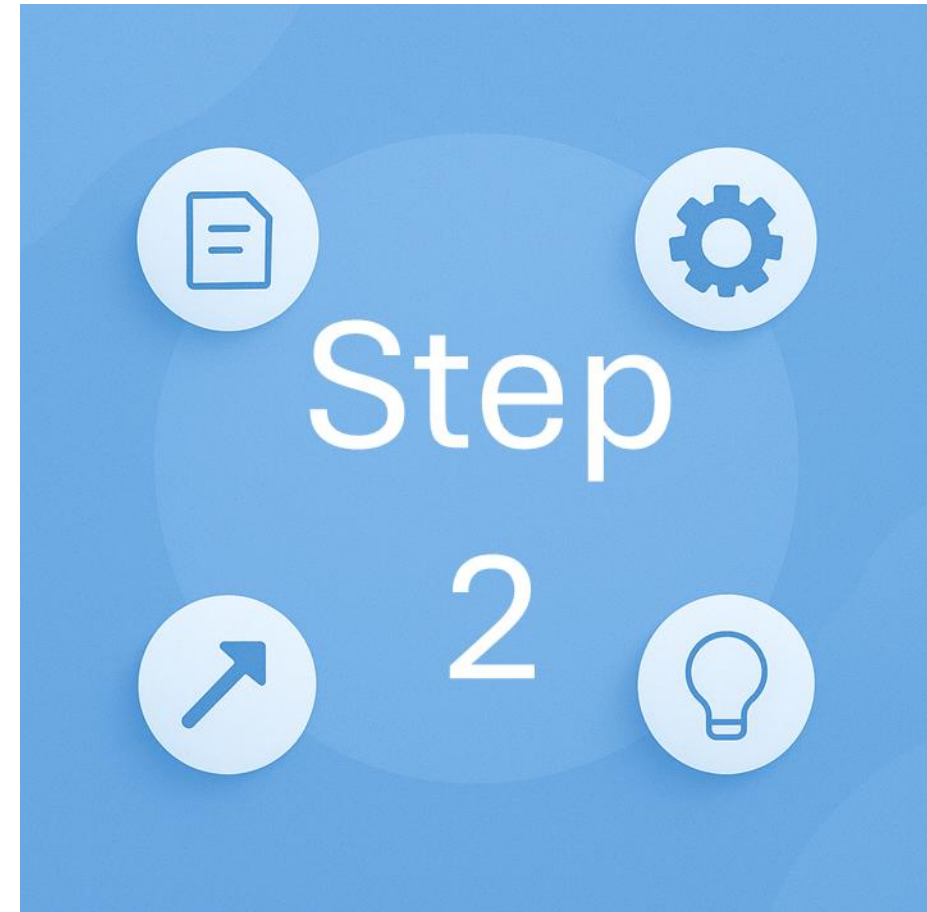
Getting Started

Step 2 – Request Installation from PCIT

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- PCIT will install and configure the key tools:
 - **Diary Entry Recording Template (TM00209)**
 - **OneRecall Diary Searches (updated version)**
 - **Diary Entry Due Alert (HP427)**
 - **Master Diary Closer (PT00410)** (*optional, but strongly recommended*)

Goal: Ensure the practice has the full toolkit in place to support the recall processes.



Getting Started

Step 3 – First-Time Tidy-Up

Step 3 – First-Time Tidy-Up

- **Run the PREPARATION search** to identify patients overdue by **>13 months**.
- **Auto-close** eligible entries using the **Master Diary Closer** (where evidence exists).
- **Manually review** any remaining backlog to resolve outstanding recalls.
- **Adopt a “clean slate” policy:** from this point forward, set all new recalls using **PCIT templates only**.

Goal: Reset the recall processes with an up-to-date, manageable baseline.



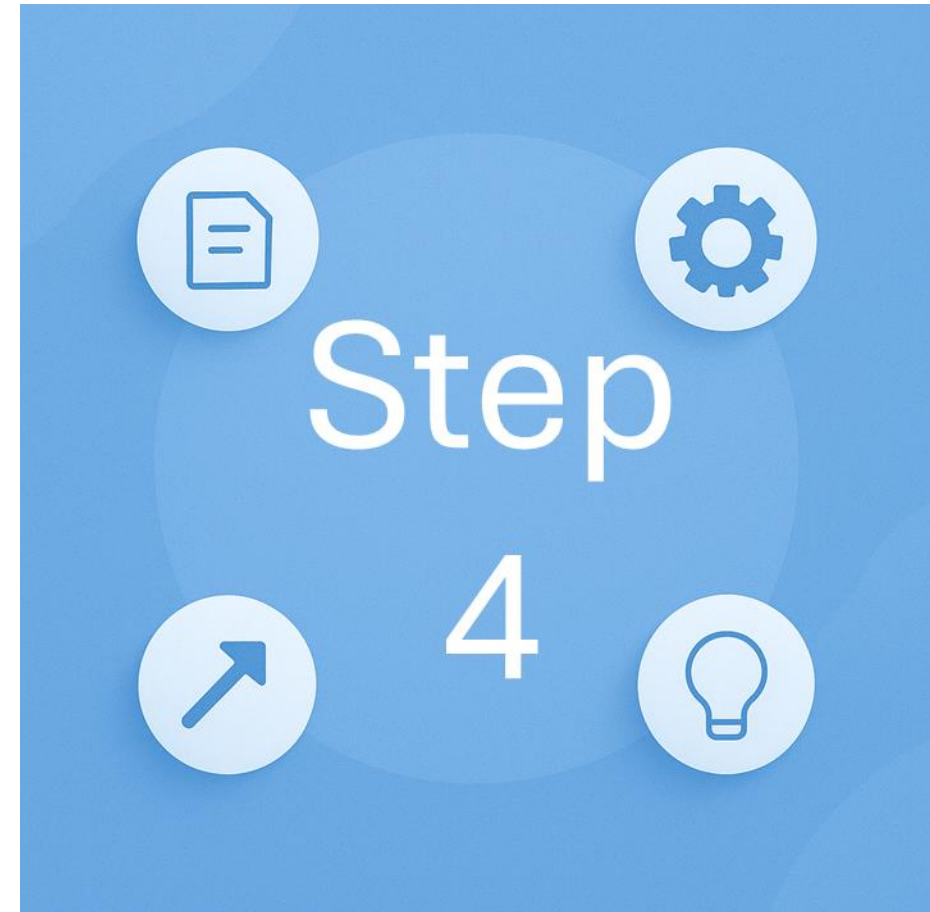
Getting Started

Step 4 – Ongoing Workflow

Step 4 – Ongoing Workflow

- **Clinicians:** Set diary recalls when using PCIT templates in consultations.
- **Admin/recall staff:** Run searches **weekly** to assign and manage recall tasks.
- **All staff:** Respond to the **Diary Entry Due Alert** when opening patient records.
- **Practice leads:** Monitor recall coverage **quarterly** to check for gaps or missed actions.

Goal: Maintain a consistent, proactive recall process across the practice.



Training your practice team



Training Your Practice Team

- Finding the Diary Recall Template (TM00209)
- Recognising & using Diary Entry Due Alert (HP427)
- Awareness of Master Diary Closer behaviour
- Running OneRecall Searches (PREPARATION first)

Finding the Diary Recall Template



Finding the Diary Recall Template

Diary Recall Template

- Search for "Diary" to find

The screenshot shows the 'Template Runner' window for a patient named WILSON, Charlie (Mr). The patient's details include Born: 02-Nov-1981 (43y), Gender: Male, and NHS No.: Unknown. The left sidebar lists various template categories, with 'Introduction' selected. The main content area displays the 'Primary Care IT OneRecall Diary Entry Template'. It includes a description of PCIT templates, a note about using OneRecall for follow-up, and a section for reporting issues. At the bottom, there is a 'Confirm that:' checkbox and a text field containing 'Diary Entry template used'. A 'Cancel' button is located at the bottom right.

Template Runner

WILSON, Charlie (Mr) Born: 02-Nov-1981 (43y) Gender: Male NHS No.: Unknown

Template Runner

Pages

- Introduction
- Q LTC - National Contracts
- Q LTC - Other
- Q Diagnostics
- Q Generic Follow Up
- Q Mental Health
- Q Women's Hlth & Contracep...
- Q Injections & Immunisations
- Q Observations or admin
- Q Medicines actions
- Q Blood tests
- LTC - National Contracts
- LTC - Other
- Diagnostics
- Generic Follow Up
- Mental Health
- Women's Health & Contracep...
- Injections & Immunisations
- Observations or admin
- Medicines actions
- Blood tests

OneTemplate

Primary Care IT OneRecall Diary Entry Template

PCIT are well known for their dynamic, innovative templates that adapt to the particular patient that is being reviewed. These incorporate all the codes you need to record follow up of conditions or activities which will ensure patients are identified by using OneRecall. Rather than the complete OneTemplates users may sometimes wish to record the need for a follow up as a standalone activity **OneRecall Diary Entry Template** fulfils that need.

Other templates that may be useful to be aware of:

OneTemplate Prescriber/NonPrescriber: Users looking for a holistic review for patients with multiple conditions will find these role based templates helpful. They are highly dynamic just showing what is needed for the specific patient you are reviewing.

If you have any issues with this or any of our other work please report it using this link and select 'Add ticket' - please include as many details as possible, including screen shots and active FMS number when the template used
To add any development requests please click on this link and fill in as many details as possible.

Alternatively, you can telephone us on 0333 344 3678

☒ Confirm that: Text: Diary Entry template used No previous entry

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Cancel

Finding the Diary Recall Template

Diary Recall Template

- First page will show any outstanding diary entry recalls or any that are due within the next 28 days

The screenshot shows the 'Template Runner' interface for a patient named WILSON, Charlie (Mr). The patient's details include a birth date of 02-Nov-1981 (43y), gender Male, and an unknown NHS number. The interface is divided into two main sections: a left-hand 'Pages' sidebar and a main content area titled 'OneTemplate'.

The 'Pages' sidebar lists various template categories, with 'Introduction' currently selected and highlighted in orange. Other categories include Q LTC - National Contracts, Q LTC - Other, Q Diagnostics, Q Generic Follow Up, Q Mental Health, Q Women's Hlth & Contracep..., Q Injections & Immunisations, Q Observations or admin, Q Medicines actions, Q Blood tests, LTC - National Contracts, LTC - Other, Diagnostics, Generic Follow Up, Mental Health, Women's Health & Contracep..., Injections & Immunisations, Observations or admin, Medicines actions, and Blood tests.

The main content area, titled 'OneTemplate', displays the 'Primary Care IT OneRecall Diary Entry Template'. It contains the following text:

PCIT are well known for their dynamic, innovative templates that adapt to the particular patient that is being reviewed. These incorporate all the codes you need to record follow up of conditions or activities which will ensure patients are identified by using OneRecall. Rather than the complete OneTemplates users may sometimes wish to record the need for a follow up as a standalone activity **OneRecall Diary Entry Template** fulfils that need.

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☒ Confirm that: No previous entry

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A 'Cancel' button is located at the bottom right of the interface.

Finding the Diary Recall Template

Diary Recall Template

- Q Pages allow quick entry of recalls in the user or activity categories

Template Runner

WILSON, Charlie (Mr) Born 02-Nov-1981 (43y) Gender Male NHS No. Unknown

Template Runner

Pages <

- Introduction
- Q LTC - National Contracts
- Q LTC - Other
- Q Diagnostics
- Q Generic Follow Up
- Q Mental Health
- Q Women's Hlth & Contracep...
- Q Injections & Immunisations
- Q Observations or admin
- Q Medicines actions
- Q Blood tests
- LTC - National Contracts
- LTC - Other
- Diagnostics
- Generic Follow Up
- Mental Health
- Women's Health & Contracep...
- Injections & Immunisations
- Observations or admin
- Medicines actions
- Blood tests

Clinician - Chronic Disease Review (QOF)

☐ Asthma annual review	Follow Up	09-Sep-2025	No previous entry
☐ Asthma follow-up	Follow Up	09-Sep-2025	No previous entry
☐ Atrial fibrillation annual review	Follow Up	09-Sep-2025	No previous entry
☐ CHD monitoring	Follow Up	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease 3 monthly review	Follow Up	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease 6 monthly review	Follow Up	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease annual review	Follow Up	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease follow-up	Follow Up	09-Sep-2025	No previous entry
☐ Coronary heart disease annual review	Follow Up	09-Sep-2025	No previous entry
☐ Dementia care plan reviewed	Follow Up	09-Sep-2025	No previous entry
☐ Follow-up diabetic assessment	Follow Up	09-Sep-2025	No previous entry
☐ Diabetic 6 month review	Follow Up	09-Sep-2025	No previous entry
☐ Diabetic annual review	Follow Up	09-Sep-2025	No previous entry
☐ Hypertension annual review	Follow Up	09-Sep-2025	No previous entry
☐ Heart failure follow-up	Follow Up	09-Sep-2025	No previous entry
☐ Hypertension monitoring	Follow Up	09-Sep-2025	No previous entry
☐ Learning disabilities annual health assessment	Follow Up	09-Sep-2025	No previous entry

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Cancel

Finding the Diary Recall Template

- Full Pages allow entry of recalls in the user or activity categories along with text to provide more detail

The screenshot displays the 'Template Runner' window for a patient named 'WILSON, Charlie (Mr)'. The patient's details include 'Born: 02-Nov-1981 (43y)', 'Gender: Male', and 'NHS No.: Unknown'. The left sidebar shows a list of categories, with 'LTC - National Contracts' selected. The main area displays the 'Clinician - Chronic Disease Review (QOF)' template, which is a list of checkboxes for various chronic conditions, each followed by a 'Follow Up' date and a 'Text' field. The conditions listed are: Asthma annual review, Asthma follow-up, Atrial fibrillation annual review, CHD monitoring, Chronic obstructive pulmonary disease 3 monthly review, Chronic obstructive pulmonary disease 6 monthly review, Chronic obstructive pulmonary disease annual review, Chronic obstructive pulmonary disease follow-up, Coronary heart disease annual review, Dementia care plan reviewed, Follow-up diabetic assessment, Diabetic 6 month review, Diabetic annual review, Hypertension annual review, and Heart failure follow-up. All 'Follow Up' dates are set to '09-Sep-2025'. The 'Text' fields are currently empty. A 'Cancel' button is located at the bottom right of the window.

Condition	Follow Up	Text
☐ Asthma annual review	09-Sep-2025	No previous entry
☐ Asthma follow-up	09-Sep-2025	No previous entry
☐ Atrial fibrillation annual review	09-Sep-2025	No previous entry
☐ CHD monitoring	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease 3 monthly review	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease 6 monthly review	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease annual review	09-Sep-2025	No previous entry
☐ Chronic obstructive pulmonary disease follow-up	09-Sep-2025	No previous entry
☐ Coronary heart disease annual review	09-Sep-2025	No previous entry
☐ Dementia care plan reviewed	09-Sep-2025	No previous entry
☐ Follow-up diabetic assessment	09-Sep-2025	No previous entry
☐ Diabetic 6 month review	09-Sep-2025	No previous entry
☐ Diabetic annual review	09-Sep-2025	No previous entry
☐ Hypertension annual review	09-Sep-2025	No previous entry
☐ Heart failure follow-up	09-Sep-2025	No previous entry

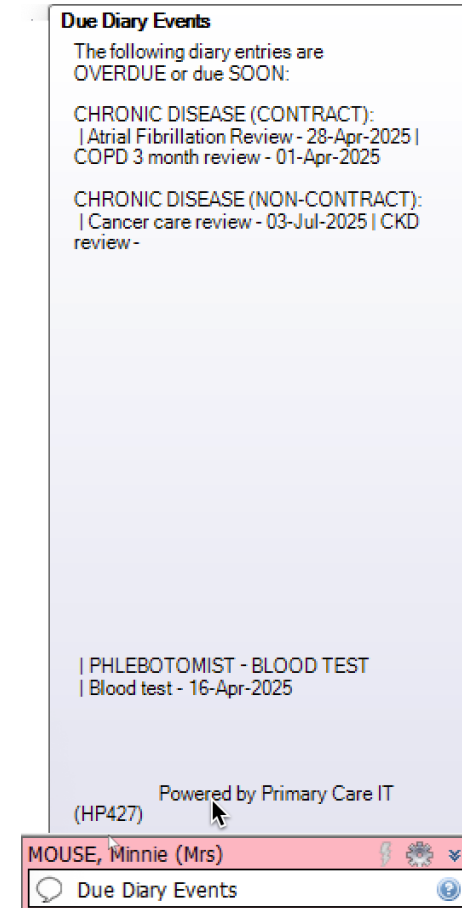
Recognising & using Diary Entry Due Alert



Recognising & using Diary Entry Due Alert

Diary Entry Due Alert

- Outstanding information divided into the categories
- For each outstanding
 - See what it is
 - See the date it was/is due



Master Diary Closer



Master Diary Closer

- **Automatic closures:** Where there is clear evidence, diary entries are closed without user input.
- **With-check closures:** For vague entries (e.g. “Change of medication”), the user is asked to confirm before closure.
- **Audit trail:** Every closure is logged in Care History with the reason and supporting codes.
- **Safe governance:** Only pre-reviewed clinical codes are accepted as evidence.
- **Maintainable:** New diary events can be added in future updates.

Master Diary Closer Example 1

- Overdue LFT

The screenshot displays the EMIS Web Health Care System interface for a patient named JACKSON, Chloe (Ms). The patient's details include a birth date of 01-Nov-1956 (68y), gender Female, and EMIS No. 31. The interface shows a 'Planned Items' section with a table listing upcoming appointments. The first item is a 'Liver function test' scheduled for 12-May-2025, which is highlighted with an orange box. The second item is 'Pneumococcal Vaccination recommended' scheduled for 12-Jun-2025, with a note that the patient is within their 65th year and a link to 'Run Template'. The interface also includes a top navigation bar with tabs for Summary, Consultations, Medication, Problems, Investigations, Care History, Diary, Documents, and Referrals. A bottom status bar shows the user as NHS Higher Level GP (SJR002) and the location as Primary Care IT Limited.

I	Date	Item	Details	Status	Action
	12-May-2025	Liver function test			
▲	12-Jun-2025	Pneumococcal Vaccination recommended	This patient is within their 65th y...	Immunisation	Run Template

Master Diary Closer Example 1

- When the protocol runs, it checks to see if there is a **diary event** for **Liver function tests**.
- If there is, it then checks for evidence of a **Liver function test** in the records
- If there is, it then checks to see if this is *later than the date of the diary event*.
- If it is, it completes the diary entry for you, since that code (or a clinically similar one*) has been received.
- **It is essential that this activity is recorded somewhere in the EMIS Care History.** A code of “**Medical records review**” is added along with details of both the **original diary entry** and the **code demonstrating activity*** as auditable ‘Associated Text’.

Date	Term	Value	Context
12-Jun-2025	Medical records review	Notes reviewed - Diary entry: 12-May-2025 Liver function test. Latest noted: 23-May-2025 Liver function test. Diary entry for 12-May-2025 Liver function test completed by Primary Care IT Diary Closer Protocol DC135	
12-Jun-2025	Additional note	HP364 used to ensure pulse rate and rhythm recorded	
23-May-2025	Liver function test		
02-Jan-2025	QRISK3 cardiovascular disease 10 year risk calculator score	54.6 % QRISK3 calculation WITH estimated Systolic BP Standard Deviation.	Value
02-Jan-2025	Oral steroid therapy		
02-Jan-2025	Antipsychotic drug therapy		
02-Jan-2025	H/O: rheumatoid arthritis		
02-Jan-2025	H/O: migraine	Found, will be automatically included in calculation	
18-Dec-2024	Weight monitoring	Current weight 115 kg equates to 18 st, 2 lb. Based on the height entry (181cm, 18-Dec-2024) a healthy weight is likely to be 61 - 82kg (9 st, 8 lb - 12 st, 13 lb)	
18-Dec-2024	Body mass index	35.1 kg/m2	Value
18-Dec-2024	Body weight	115 kg	Value
18-Dec-2024	Standing height	181 cm	Value

Master Diary Closer Example 2

- Not all diary entries are safe to automatically reconcile in this way. They are too vague in nature and can't be precisely mapped to an activity code. In this example we have the overdue diary entry for **“Change of medication”** and supporting text about pregabalin dosing.

EMIS Web Health Care System - Primary Care IT Limited - 150032

Summary Consultations Medication Problems Investigations Care History **Diary** Documents Referrals

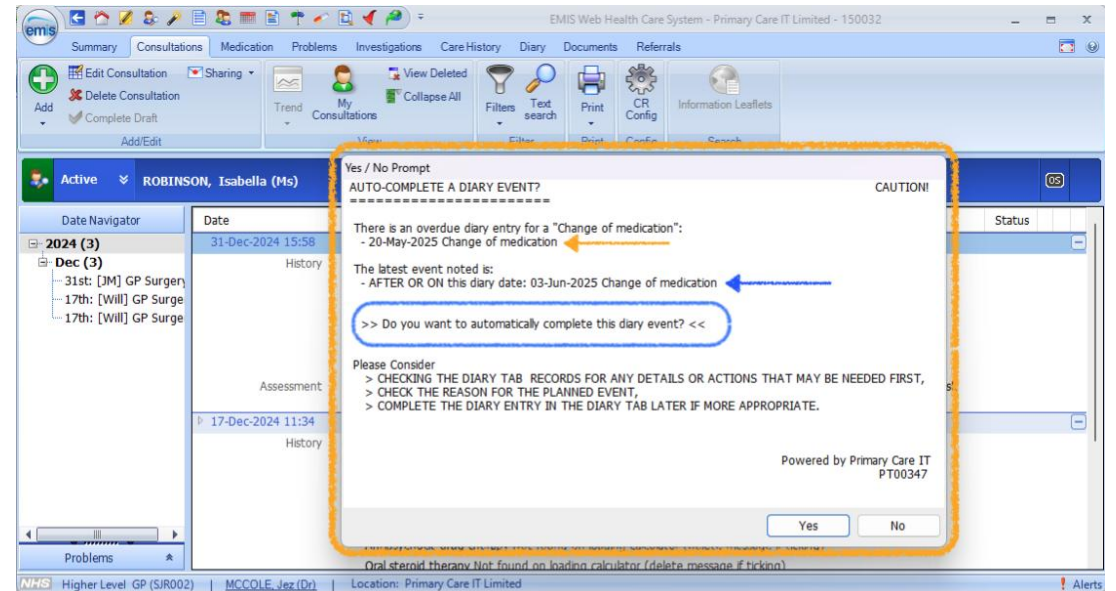
Active ROBINSON, Isabella (Ms) Born 14-Feb-1955 (70y) Gender Female EMIS No. 26

Date	Item	Details	Status	Action
02-May-2025	Thyroid disease monitoring			
20-May-2025	Change of medication	We are planning on reducing Pregabalin with Isabella ... We are planning on reducing Pregabalin with Isabella at about this time. Please review when seen.		
12-Jun-2025	ES: CKD review needed	Your patient has CKD. There is an Enhanced Service...	QOF	Run Template
12-Jun-2025	RAG: NOT RECORDED	This patient has not been assigned a RAG status yet....	Information	Run Template
12-Jun-2025	SCREENING OVERDUE	This patient is overdue for their:Bowel cancer screeni...	Information	Run Template
12-Jun-2025	High Risk CVD review recommended	This patient is at high risk of cardiovascular disease an...	QOF	Run Template
12-Jun-2025	ES: Eligible for pulse rate and rhythm	Your patient is eligible for AF screening with pulse rat...	QOF	Run Template
12-Jun-2025	Pneumococcal Vaccination recommended	This patient is within their 65th year or over and has ...	Immunisation	Run Template
12-Jun-2025	Eligible for shingles (herpes zoster) vaccination	Currently eligible for vaccination.Refer to Green book ...	Immunisation	Run Template

NHS Higher Level GP (SJ002) | MCCOLE, Jez (Dr) | Location: Primary Care IT Limited

Master Diary Closer Example 2

- Since we can't automatically reconcile such a vague diary event, the following process occurs.
 - The protocol checks to see if there is an **overdue diary event** for **Change of medication**.
 - If there is, it then checks for evidence of a **Change of medication code** in the records
 - If there is, it then checks to see if this is *later than the date of the diary event*.
 - If it is, a dialogue box is presented to the user. The user is asked about whether it is safe to complete the diary entry and as much information as technically possible is shown.



Master Diary Closer Example 2

- Clicking “Yes”
 - If you click “**Yes**”, you are opting to complete the diary entry at this point, with the information presented.
 - **It is still essential that this activity is recorded somewhere in the EMIS Care History.** A code of “**Medical records review**” is added along with the message “Notes reviewed automatically and verified by user”, with details of both the **original diary entry** and the **code demonstrating activity*** as auditable ‘Associated Text’.

EMIS Web Health Care System - Primary Care IT Limited - 150032

Summary Consultations Medication Problems Investigations Care History **Diary** Documents Referrals

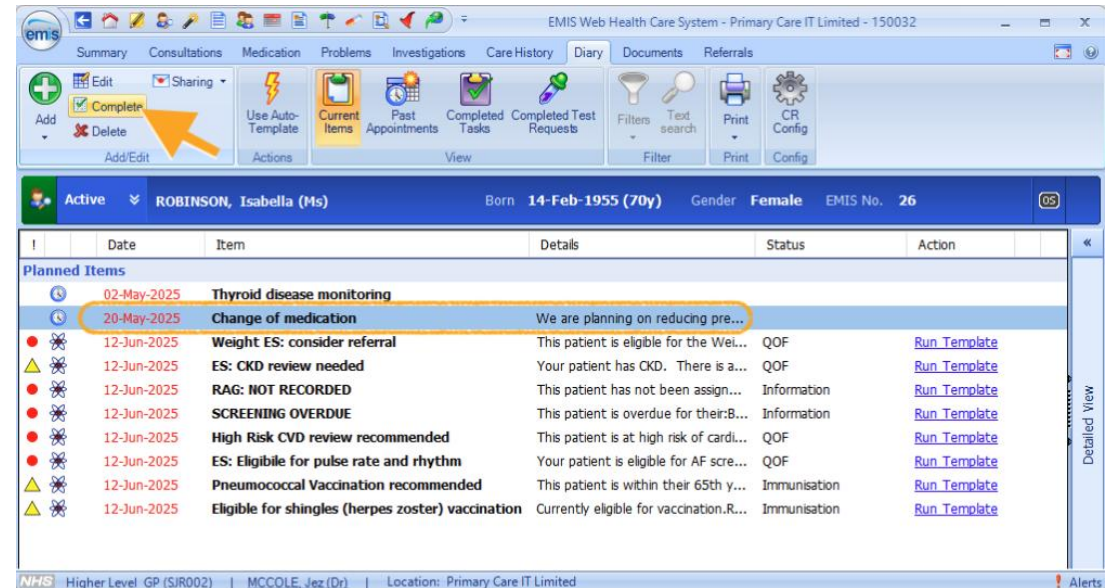
Active ROBINSON, Isabella (Ms) Born 14-Feb-1955 (70y) Gender Female EMIS No. 26

Date	Term	Value	Context
12-Jun-2025	Medical records review	Notes reviewed automatically and verified by user - Diary entry: 20-May-2025 Change of medication. Latest noted: 03-Jun-2025 Change of medication. Diary entry for 20-May-2025 Change of medication completed by Primary Care IT Diary Closer Protocol DC085	
03-Jun-2025	Change of medication		
16-May-2025	Thyroid disease monitoring		
31-Dec-2024	QRISK3 cardiovascular disease 10 year risk calculator score	57.3 %	Value
31-Dec-2024	Oral steroid therapy	Not found on loading calculator (delete message if ticking)	
31-Dec-2024	Antipsychotic drug therapy	Not found on loading calculator (delete message if ticking)	
31-Dec-2024	On severe mental illness register	Not found on loading calculator (delete message if ticking)	
31-Dec-2024	H/O: rheumatoid arthritis	Not found on loading calculator (delete message if ticking)	
31-Dec-2024	H/O: migraine	Found 17-Dec-2024 H/O: migraine	
31-Dec-2024	Antihypertensive therapy	Not found on loading calculator (delete message if ticking)	
17-Dec-2024	Weight monitoring	Current weight 107 kg equates to 16 st, 12 lb. Based on the height entry (171cm, 17-Dec-2024) a healthy weight is likely to be 54 - 73kg (8 st, 7 lb - 11 st, 7 lb)	

NHS Higher Level GP (SJ002) MCCOLE, Jez (Dr) Location: Primary Care IT Limited

Master Diary Closer Example 2

- Clicking No
 - You may not be able to answer “Yes” at this point, since you may need to investigate the care record further.
 - If you check the care records and discover that it is safe to complete the overdue diary event, then you can retrigger running of the protocol again by re-saving the record, manually launch the protocol
 - ...or
 - Go to the Diary tab in EMIS, click the overdue diary entry, then click  **Complete**



Searches



Searches

- 024 OneRecall (v4)
 - *Week 1 - Monthly recalls
 - *Week 2 or 3 - Follow up recalls
 - *Week 3 or 4 - Defaulters from follow up
 - *Week 4 - New patients
 - Housebound patients
 - Preparation or addition
 - ~~Base searches~~
 - NEW Diary Entry Recall**
 - Placeholder

- *PREPARATION - All recall diary entries more than 13 months overdue
- ALL RECALL DIARY ENTRIES
- Clinician – Chronic Disease Review (National Contract)
- Clinician – Chronic Disease Review (Non-QOF)
- Diagnostics – Imaging & Monitoring
- Generic follow up
- Mental Health – GP or MH Nurse
- Nurse – Women's Health & Contraception
- Nurse/HCA – Injections & Immunisations
- Nurse/HCA – Observations or Admin
- Pharmacist – Medication Review
- Phlebotomist – Blood Test

Searches

The screenshot displays the EMIS software interface. At the top, there is a menu bar with options: Population Reporting, Enquiry Manager, FP34D Reports, Batch Data Manager, SNOMED CT inactive codes, and Pharmacist - Medication Review. Below the menu bar is a toolbar with icons for Edit Report, Print, Export, Flat, Hierarchy, and Close. The main area shows a report titled 'Pharmacist - Medication Review'. The report includes a summary section with 'Parent Population: NEW - Pharmacist - Medication Review', 'Last Run: 08-May-2025 19:28', and 'Relative Date: 08-May-2025 19:28'. Below this is a table with columns 'Population Count', 'Males', and 'Females'. The data row shows 1 population count, 0 males, and 1 female. At the bottom, there is a table with columns 'Patient Details' and 'Diary Entries'. The patient details table has columns: EMIS Number, Full Name, Age, Date of Birth, and Gender. The diary entries table has columns: Date and Code Term. The data row shows EMIS Number 5, Full Name XXTESTPATIENT-TGQI, Dummythree (Mrs), Age 34, Date of Birth 11-Dec-1990, Gender Female, Date 16-Oct-2024, and Code Term Medication review.

Tasks - 3 (1)

Pharmacist – Medication Review

Parent Population: NEW – Pharmacist – Medication Review
Last Run: 08-May-2025 19:28 Relative Date: 08-May-2025 19:28

Population Count	Males	Females
1	0	1

Patient Details					Diary Entries	
EMIS Number	Full Name	Age	Date of Birth	Gender	Date	Code Term
5	XXTESTPATIENT-TGQI, Dummythree (Mrs)	34	11-Dec-1990	Female	16-Oct-2024	Medication review

Ongoing support and Next Steps



Ongoing support

- Dedicated PCIT Customer Relationship Manager
- Training at go-live and refresher sessions
- Guidance on recall allocation and diary cleanup
- Support Desk with fast SLAs for troubleshooting
- Detailed online support articles for self-help

Next Steps

- Raise a ticket to request installation
- Work with your PCIT CRM for rollout
- Access support articles for guidance

Any Questions?