



Queen Mary
University of London



APL-Imms Child imms call/recall tool

User guide for EMIS Web

ceg

Clinical Effectiveness Group
Queen Mary University of London

v2.4 October 2023

About

Systematic call and recall

CEG's child imms call/recall tool 'APL-Imms' is designed for use within GP practices. It displays coded information from patient records, making it easy to call and recall children for their routine immunisations on time and ensure no child is left behind.

The tool will support you to:



Prioritise

Filter your patients aged 0-5 according to when their immunisations are due or overdue. Export lists in a range of formats, to send appointment messages or agree actions with colleagues.



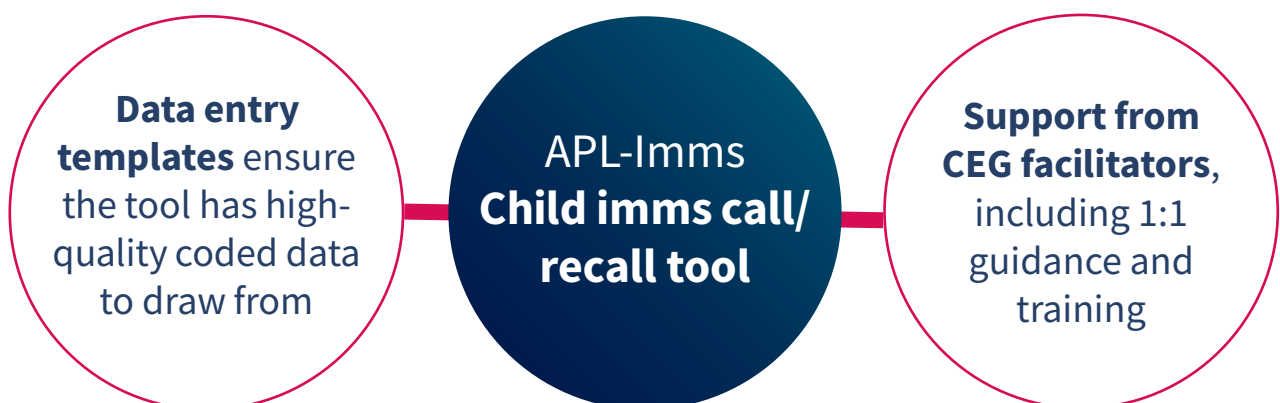
Tailor your approach to individuals

See relevant details about each patient in your list, such as contraindications and declines, simply by clicking on their name in the tool. Access information on vaccine ingredients and schedules to help guide your conversations with parents.

Quality improvement programme

In North East London, CEG's child imms call/recall tool is available as part of a wider programme of support to improve coverage and timeliness of routine childhood immunisations.

The programme includes 1:1 training and support for GP practices from CEG's team of facilitators, and data entry templates to ensure the call/recall tool has high-quality coded data to draw from.



Limitations

No replacement for clinical judgement

CEG's child imms call/recall tool is **not a diagnostic tool or intended to replace clinical judgement**. The tool displays information coded in the patient record and can be used to highlight children whose records indicate their vaccinations are incomplete, due, missing or delayed. It does not make management recommendations – these are entirely a matter for the clinician.

Only presents coded information

The tool only presents information that is **coded** in the patient health record. It is important to use it with a data entry template to ensure your activity is coded correctly. In North East London, this is the CEG data entry template '**Childhood Immunisations CEG**' (you can find it by searching 'CEG child' in Resource Publisher).

In cases where the codes do not clearly describe a child's vaccination history, clinicians are advised to manually check the patient record for uncoded information which would not be picked up by the tool, and/or check the Red Book or other patient-held records.

Contact us

If you have any questions or feedback about our child imms call/recall tool or this user guide, please get in touch:

ContactCEG@qmul.ac.uk

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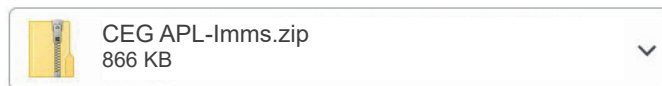
Downloading APL-Imms

You only need to do this once

Step 1: Download

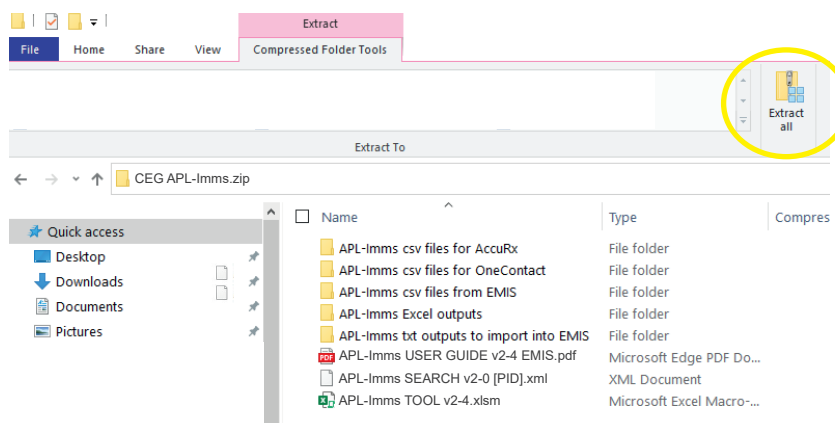
1.1 Download the APL-Imms zip file.

1.2 Double click the zipped file, then double click again.



Step 2: Extract

Click **'Extract all'** to extract the files.



Step 3: Save

Save the files in a shared folder so they are accessible to other practice staff, including clinicians reviewing your work. Choose a secure device or network if you intend to save exports of patient identifiable data in the same place.

Our files are saved:

Step 4: Unblock macros

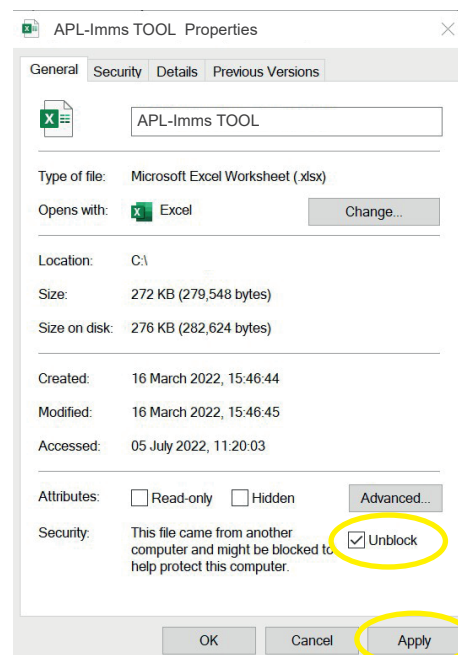
Microsoft has introduced a security feature that blocks Excel macros by default. Macros are automated actions that the tool uses to run - without them, it will not work.

4.1 Right click on the **'APL-Imms TOOL'** XLSM file and select **'Properties'**.

4.2 In the 'General' tab, **tick the box to 'Unblock'**

4.3 Click **'Apply'**. You must click 'Apply' before 'OK', otherwise the change won't take affect.

If you accidentally click 'OK' without clicking 'Apply', the option will no longer be visible and you will need to download the file again.



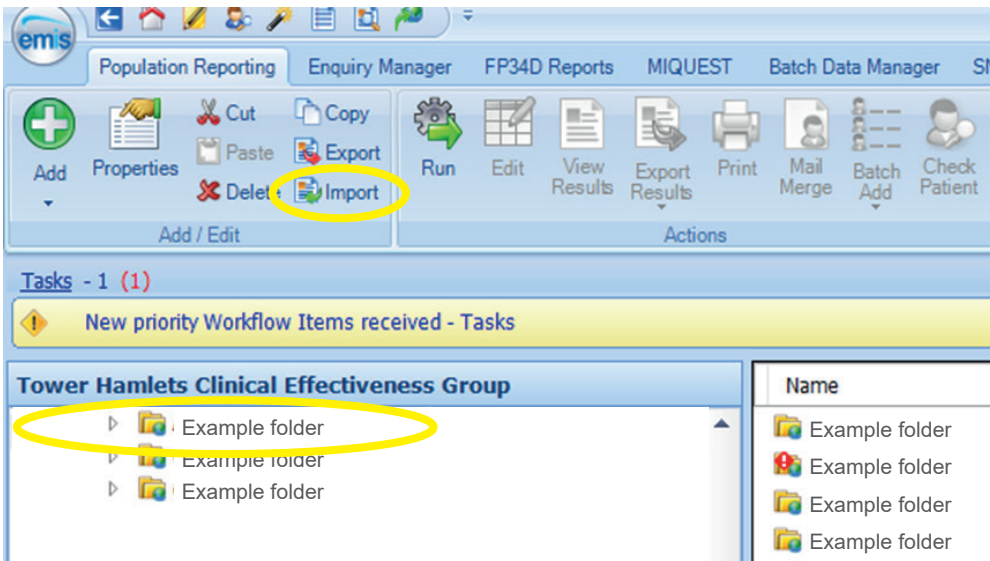
Step-by-step: Listing patients for call/recall

We recommend doing this weekly

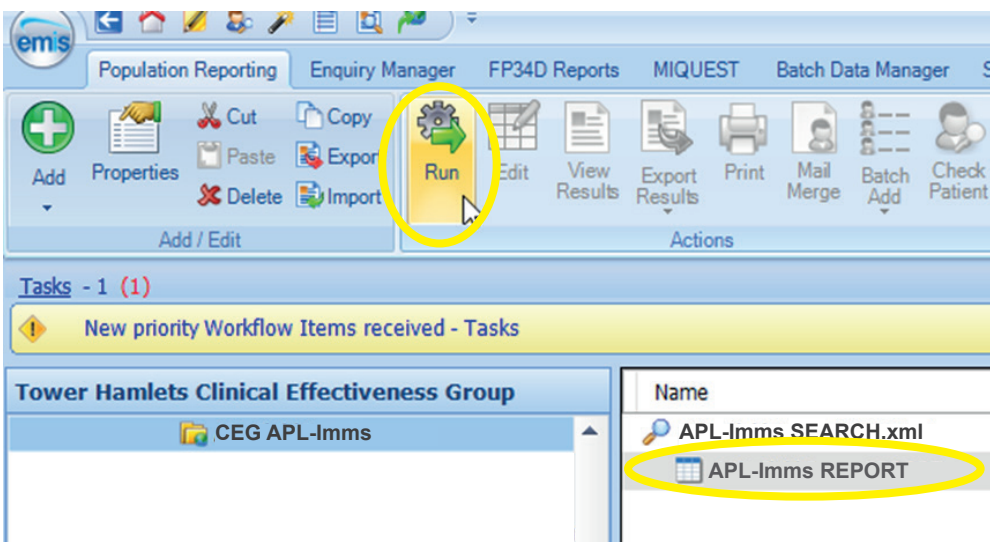
Step 1: Run the search in EMIS

1.1 Open EMIS Web and click 'Population Reporting' in the Quick Launch Menu.

1.2 Choose a destination folder and click 'Import':



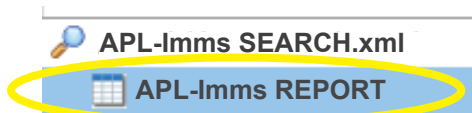
1.3 Navigate to **APL-Imms SEARCH.xml (EMIS file)**, select the **REPORT** and click 'Run':



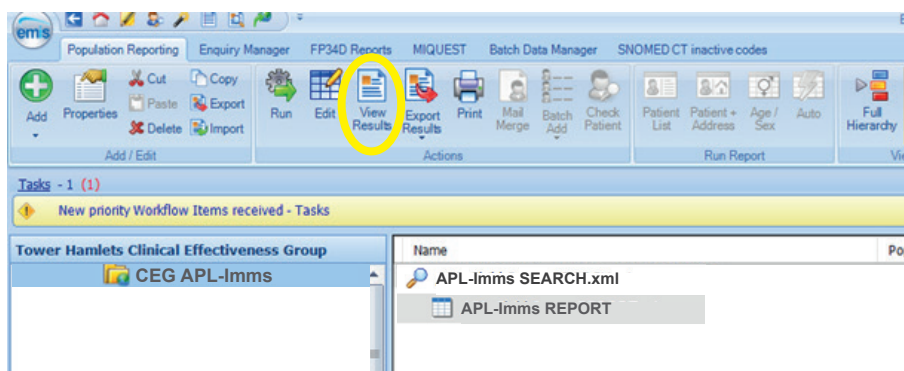
Step-by-step: Listing patients for call/recall

Step 2: Export the search results

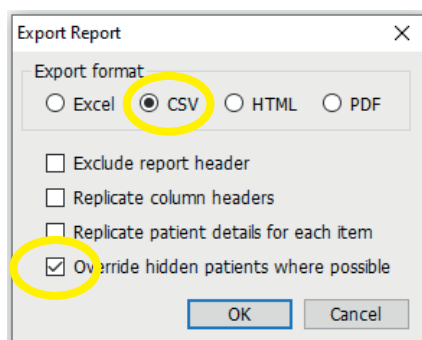
2.1 When the run is complete, select the **APL-Imms Report** (it has a grid icon rather than a magnifying glass):



2.2 Click '**View Results**' in the top ribbon. When the table of patients has loaded, click '**Export**'.



2.3 Choose to export it as a **CSV** and tick the bottom checkbox: '**Override hidden patients where possible**':



2.4 Save your export in a location where you can find it easily and include the export date in the file name.

The APL-Imms download includes a set of empty folders that you can use to organise your files if you wish. It includes one labelled 'csv files from EMIS'.

Important: Patient identifiable data should always be stored on a secure device or network.

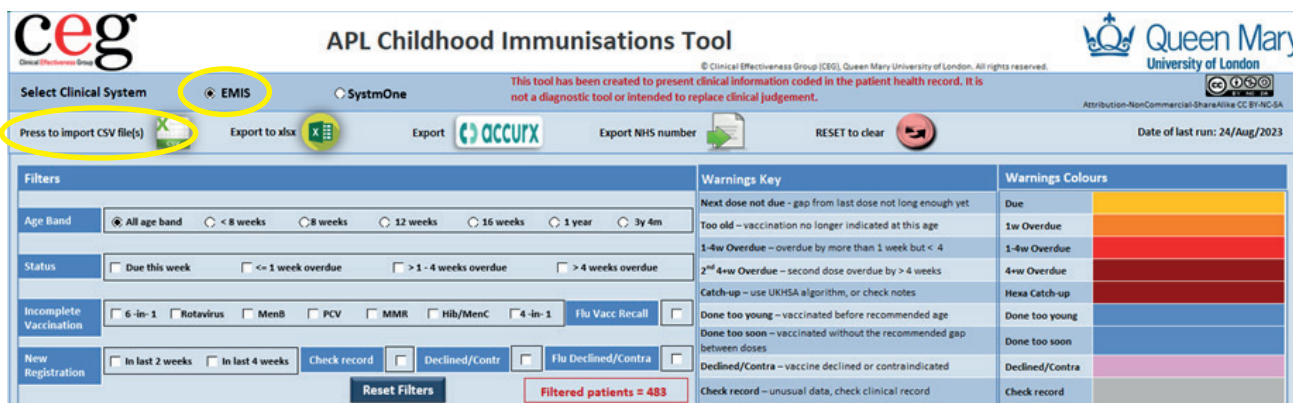
Step-by-step: Listing patients for call/recall

Step 3: Import data into the tool

3.1 Open **APL-Imms TOOL.xlsm** (Excel file).

3.2 Select 'EMIS' as your clinical system.

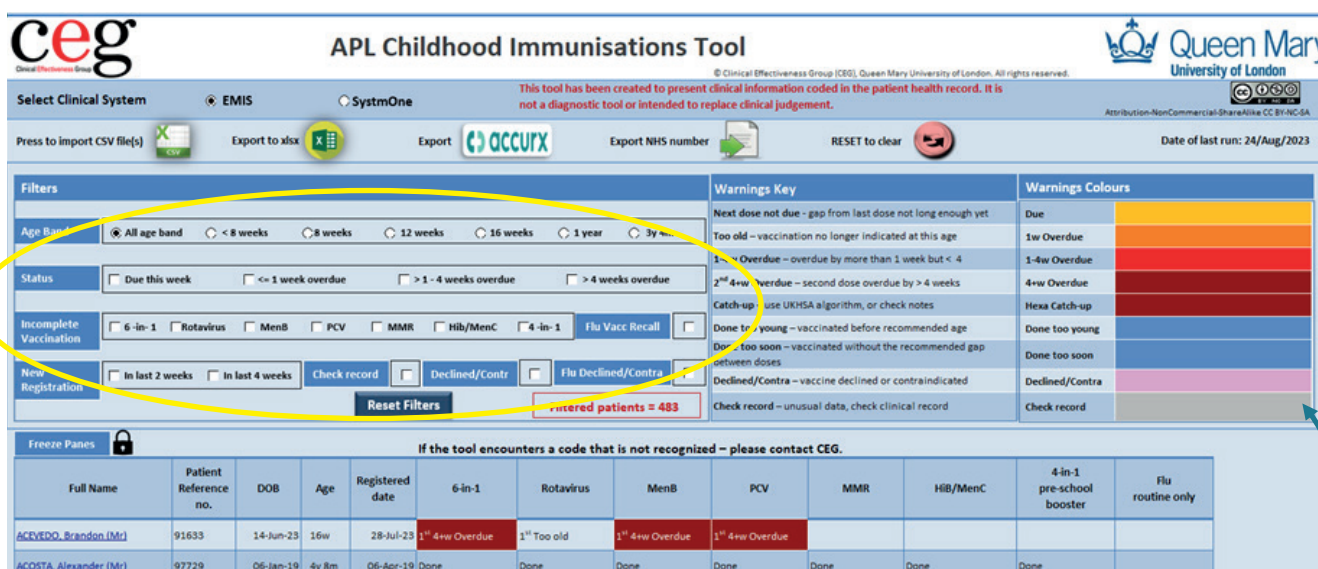
3.3 Click 'Press to locate CSV file'. Find and select the file you just exported from EMIS Web.



Important: Each time you use the tool, run a new search in EMIS and import fresh data. A warning will pop up if you try to use old data.

Step 4: Create a patient list using filters

Use the **checkboxes** to filter your list. The tool will list all patients who meet the criteria:



Depending on the aim of your call/recall, you could list patients who are 8 weeks old and due a vaccination this week, or who are more than 4 weeks overdue, for example. The age brackets are mutually exclusive, so '8 weeks' includes all children between 8 weeks and 12 weeks minus a day.

The 'Check record' flag appears when the tool encounters data it can't process in the normal way. For example, a second MMR when there is no record of a first. You can use the 'Check record' filter to list any affected records.

These screenshots do not show real patients, we used a dummy dataset with randomly generated names.

Step-by-step: Listing patients for call/recall

Step 5: Review individuals easily

5.1 Click a patient's name in the list to see more detail from their EMIS record:

The screenshot shows the APL Childhood Immunisations Tool interface. At the top, there are logos for CEG and Queen Mary University of London. Below the logos, there are navigation options for 'Select Clinical System' (EMIS, SystemOne) and a warning message: 'This tool has been created to present clinical information coded in the patient health record. It is not a diagnostic tool or intended to replace clinical judgement.' There are also buttons for 'Press to import CSV file(s)', 'Export to xls', 'Export', 'Export NHS number', and 'RESET to clear'. A 'Date of last run: 24/Aug/2023' is displayed.

The main area contains a 'Filters' section with various options for 'Age Band', 'Status', 'Incomplete Vaccination', and 'New Registration'. A 'Warnings Key' section lists various warning types such as 'Next dose not due', 'Too old', '1-4w Overdue', '2nd 4w Overdue', 'Catch-up', 'Done too young', 'Done too soon', 'Declined/Contra', and 'Check record'. A 'Warnings Colours' section shows color-coded boxes for 'Due', '1w Overdue', '1-4w Overdue', '4w Overdue', 'Hexa Catch-up', 'Done too young', 'Done too soon', 'Declined/Contra', and 'Check record'. A 'Filtered patients = 483' indicator is shown.

Below the filters is a table of patients. The first row is highlighted with a yellow circle:

Full Name	Patient Reference no.	DOB	Age	Registered date	6-in-1	Rotavirus	MenB	PCV	MMR	Hib/MenC	4-in-1 pre-school booster	Flu routine only
ACEVEDO, Brandon (Mr)	91633	14-Jun-23	16w	28-Jul-23	1 st 4w Overdue	1 st Too old	1 st 4w Overdue	1 st 4w Overdue				
ACOSTA, Alexander (Mr)	97729	06-Jan-19	4y 8m	06-Apr-19	Done	Done	Done	Done	Done	Done	Done	
ADAMS, Hunter (Mr)	23075	27-Oct-21	23m	05-Nov-21	Done	Done	Done	Done	Done	Done		

The **Patient Information** screen pulls relevant details from the patient record, including registration data, vaccination dates and previous declines and contraindications. It also highlights any **safeguarding concerns** for that child and flags missing ethnicity information.

This screen also includes a **comprehensive list of links** to professional resources to help with patient conversations, catch-up schedules and more.

5.2 Click 'BACK' to go back to your patient list.

The screenshot shows the Patient Information screen for Linda Taylor. At the top, there are logos for CEG and Queen Mary University of London. A 'BACK' button is highlighted with a yellow circle. The 'Patient Information' section includes fields for 'Full Name', 'Date of Birth', 'Gender', 'Ethnicity', 'Patient Ref #', 'Registration Date', and 'Mobile number'. Below this is a table of '6-in-1/Hexa component vaccines' with columns for 'Vaccine', 'Status', 'Date given', and 'Age at Event'. The 'Meningitis B Vaccine' section is also visible.

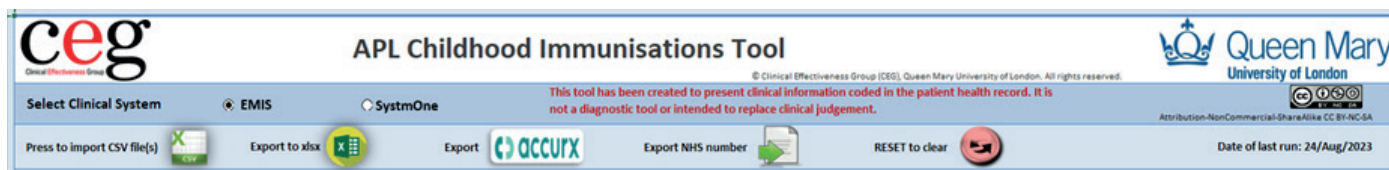
6-in-1/Hexa component vaccines				Date given	Age at Event
Hepatitis B	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	
Haemophilus influenzae B	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	
Diphtheria	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	
Tetanus	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	
Pertussis/Whooping Cough	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	
Polio	Done	Third DTap/IPV/Hib/HepB vaccination	25-Oct-2021	18w	

The 'Useful Links' section includes links for 'Routine vaccination schedule', 'Catch-up (uncertain or incomplete status) schedule', 'Patient Group Directions: Vaccinations', 'Green Book', 'Foreign vaccination comparator', 'PHI/NHS immunisation leaflets', 'Vaccination leaflet for new migrants', 'Useful for hesitancy discussions', 'FAQs about vaccines', 'Vaccine Ingredients', 'Stories about people affected by infectious diseases (short films)', and 'General info about vaccines (includes info about individual vaccines, e.g. MMR, rotavirus, flu, etc.)'. A 'Professional Resources' section is also present.

The 6-in-1 components are listed separately to accommodate children who started their vaccinations abroad using a different schedule.

Step-by-step: Listing patients for call/recall

Step 6: Using your list



Option 1: Print

Click 'File' then 'Print'. Set the orientation to landscape and scale to fit.

Option 2: Export as an Excel file

Click 'Export to xlsx' - You could use this file to add notes of actions taken/to be taken, but these will not go into the patient record.

Option 3: 'Export for Accurx'

To contact patients or arrange appointments.

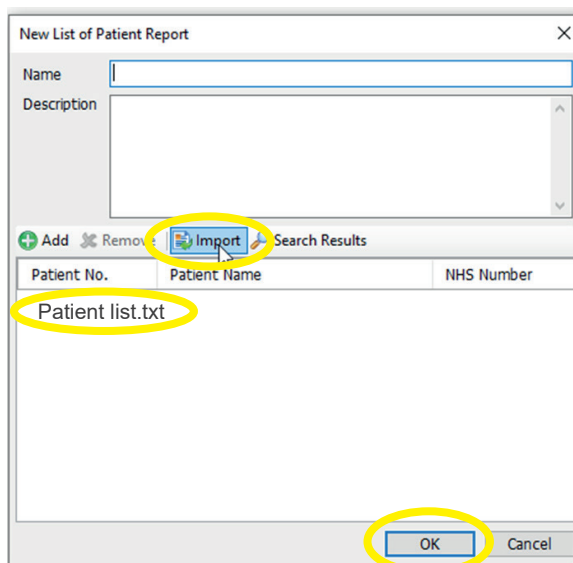
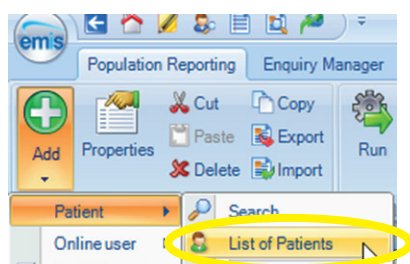
Option 4: 'Export as NHS numbers' (for advanced users)

This will create a .txt file that you can import back into EMIS to batch add codes, letters, or run child searches or auto reports.

Remember to use a template to code any actions, including invitations and declines. This will ensure every patient record has a clear, coded history that the tool will draw from next time you use it. In North East London, this is the CEG template: 'Childhood Immunisations CEG'.

How to import NHS numbers into EMIS (for advanced users)

- 1 Follow **Option 4** above to export your list as NHS numbers.
- 2 Open EMIS Web and click '**Population Reporting**'.
- 3 Select a folder of your choosing. Click '**Add**', '**Patient**', '**List of Patients**'.
- 4 Click '**Import**' and navigate to your .txt file of NHS numbers (repeat if you have multiple lists) then click '**OK**'.



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