EMIS Batch Coding Procedures

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Run the Report:

In Population Reporting, run the desired report for batch coding.

Export the list using the Export Results tab. Choose either "Population Included" or "Population Excluded" as needed and save as an Excel file on the Y Drive.

Prepare the File:

Open the Excel file and delete all columns except the NHS number column. Delete the first row containing the column title.

Save the file as a Text (MS-DOS) (*.txt) document.

Import the Patient List into EMIS:

In EMIS Population Reporting, select the appropriate folder and click ADD > Patient > List of Patients.

Name the new patient list and click Import. Locate the text file saved earlier and import it. Confirm the patient list appears.

Batch Add a Code:

Go to the Batch Data Manager tab and click Add > Clinical Code.

Browse for the clinical code to be added and set the desired date for the entry.

Enter descriptive text for notes, if applicable.

Under "List Type Search Population (Included)", select the previously created patient list.

Add an optional description for auditing purposes.

Choose to run the process immediately or schedule it for later.

Verify the Code:

Refresh the Batch Data Manager until the process shows as complete.

Check the patient list to confirm the code has been added successfully.

How to Undo Batch Coding in EMIS

Note: This process can only be completed within 7 days of adding the batch code.

Step-by-Step Process:

Access the Batch Data Manager:

Go to EMIS Population Manager and navigate to the Batch Data Manager tab.

Select the Erroneous List:

Highlight the patient list associated with the incorrect batch coding.

Undo the Batch Coding:

Click Undo on the ribbon to remove the batch code from all selected patient records.

Version Control

Date	Version	Author	Change Details
18/02/2020	1.0	HJG/LDT	Initial creation of batch add SOP
May/2023	2.0	LT	Added undo batch coding procedures.
15/11/2024	3.0	Claudia Filipe	How to Batch Add a Code in EMIS & How to Undo Batch Coding in EMIS Combined in one SOP