

# General Practice Workload Tool

The filter enhancements (additional filters for session holder, session category, slot type) to this module are only available to organisations on version 8.4.2 or above.

Working alongside NHS Digital, we've developed a General Practice Workload Tool (GPWT). This tool gives you an overview of your appointment activity, provided in the form of charts and grids, helping you to match the supply of your appointments to demand.

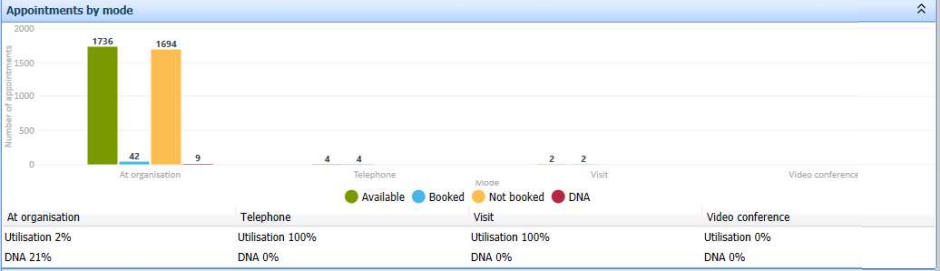
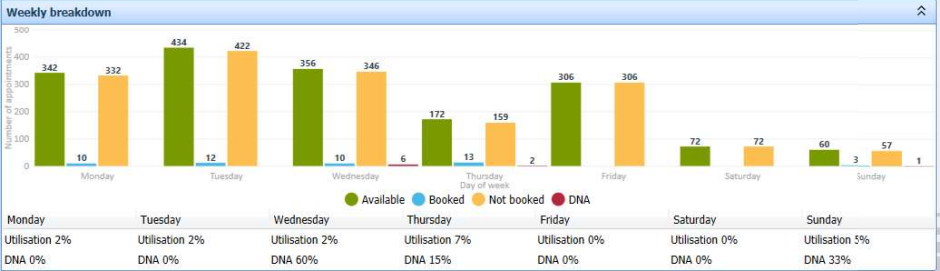
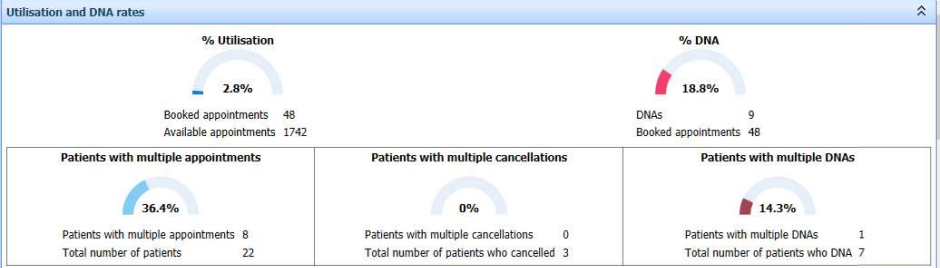
The GPWT has been developed as part of NHS England's commitment, mentioned in the General Practice Forward View, to provide an automated appointment measuring interface to enable you to quickly view information on your appointment capacity and utilisation.

We've created the GPWT in a new module in EMIS Web to help you keep track of your appointment utilisation.

## Viewing the General Practice Workload Tool

The GPWT displays your appointment data on one single worksheet in the form of grids, bar charts and speedometers.

01-Jul-2018 to 31-Aug-2018 | Report generated on : Mon, Jul 30 2018 14:32:31



### Age/Gender utilisation summary

Age Group	Gender	Booked	DNA	DNA Rate	Booked	DNA	DNA Rate	Total	Booked	DNA	DNA Rate
Less than 1 year	Male	0	0	0%	0	0	0%	0	0	0	0%
	Female	0	0	0%	0	0	0%	0	0	0	0%
1 - 5 year	Male	0	0	0%	0	0	0%	0	1	1	100%
	Female	1	1	100%	1	1	100%	2	1	1	100%
6 - 15 year	Male	3	2	66.7%	3	1	33.3%	6	3	3	50%
	Female	3	1	75%	1	0	0%	4	3	0	0%
16 - 45 year	Male	15	2	13.3%	1	0	0%	16	16	2	12.5%
	Female	2	0	0%	1	0	0%	3	1	0	0%
46 - 64 year	Male	2	0	0%	4	1	25%	6	6	1	16.7%
	Female	0	0	0%	2	0	0%	2	1	0	0%
65 - 80 year	Male	4	0	0%	2	0	0%	6	6	0	0%
	Female	0	0	0%	1	1	100%	1	0	1	100%
81+ year	Male	0	0	0%	0	0	0%	0	1	1	100%
	Female	1	1	100%	1	0	0%	2	1	0	0%

### 3<sup>rd</sup>, 4<sup>th</sup> and 5<sup>th</sup> available appointments

Available appointments for EMISWebCR1 50002

Days until 3 <sup>rd</sup> next available appointment	Days until 4 <sup>th</sup> next available appointment	Days until 5 <sup>th</sup> next available appointment
1 (31-Jul-2018 09:10)	1 (31-Jul-2018 09:10)	1 (31-Jul-2018 09:20)

Available appointments for session holders


Session holder	Days until 3 <sup>rd</sup> next available appointment	Days until 4 <sup>th</sup> next available appointment	Days until 5 <sup>th</sup> next available appointment
BURGESS, Neil (Dr)	2 (01-Aug-2018 09:20)	2 (01-Aug-2018 09:30)	2 (01-Aug-2018 09:40)
TEST, Emis (Dr)	2 (01-Aug-2018 09:20)	2 (01-Aug-2018 09:30)	2 (01-Aug-2018 09:40)
USER, Common (Dr)	1 (31-Jul-2018 09:10)	1 (31-Jul-2018 09:10)	1 (31-Jul-2018 09:20)

### Appointments by session holder

Session holder	Available	Booked	Not booked	Utilisation rate	DNA	DNA rate
PANDU, Kannan (Mr)	133	9	124	6.8%	1	11.1%
USER, Common (Dr)	832	11	821	1.3%	0	0.0%
TEST, Emis (Dr)	104	7	97	6.7%	4	57.1%
KUMAR 50002, Muthu (Mr)	52	1	51	1.9%	0	0.0%
BURGESS, Neil (Dr)	559	8	551	1.4%	4	50.0%
POTTER, Ann (Mrs)	8	2	6	25.0%	0	0.0%
A, Vinitha (Ms)	54	10	44	18.5%	0	0.0%

### Example of the data displayed in the GPWT

Your appointments data is split into sections to help you easily analyse how your appointment book is used.

Each section is collapsible. Click  at the top of each section to minimise.

Section	Description
Utilisation and DNA rates	These speedometers display the utilisation of your appointments throughout the chosen time period (how many booked appointments v. how many available appointments) and the Did not attend (DNA) rate of your booked appointments in percentages.
Weekly breakdown	This section displays a breakdown of your available, booked, not booked and DNA'd appointments for the week or a weekly average for the chosen date range if this exceeds a week. <b>Tip:</b> Hover over any column in the bar chart to see specific numbers of appointments.
Appointments by mode	Displays your available, booked, not booked and DNA'd appointments by the type of appointment e.g. telephone, visit. <b>Tip:</b> Hover over any column in the bar chart to see specific numbers of appointments.
Age/Gender utilisation summary	Displays your booked and DNA'd appointments broken down by age group and gender.
3rd, 4th and 5th available appointments	This section shows you how many days until your next available appointments at the organisation as a whole, as well as each GP's next available 3rd, 4th and 5th appointments, including the date and time. <b>Note:</b> If your date range refers to past data e.g. last month, this section displays no data.
Appointments by session holder	Shows each session holders utilisation rate and DNA rate in relation to their available, booked, not booked and DNA'd appointments.

## Using the General Practice Workload Tool

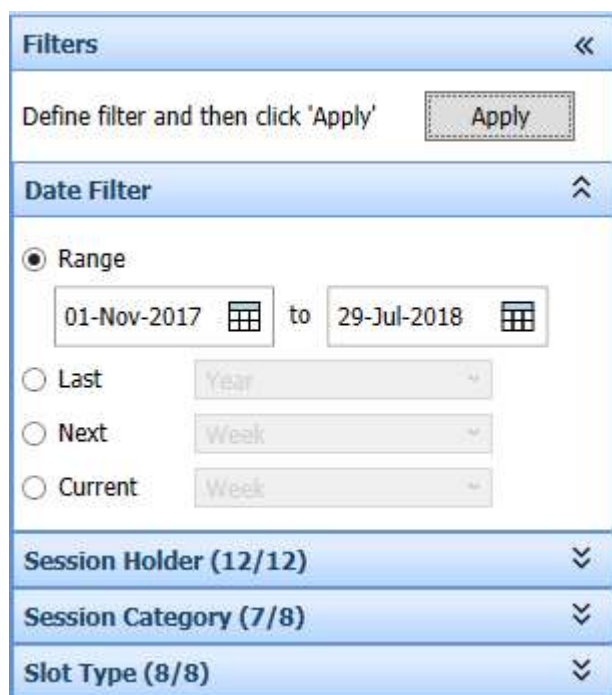
The GPWT is built into EMIS Web as a new module under Appointments. To access the module:

1. Click .
2. Hover over **Appointments**.
3. Select **General Practice Workload Tool**.

### Filters

Use the filters to display specific data by date range, session holder, session category and slot type.

The options you select (as a user) for the session holder, session category and slot type filters will be remembered, even when you log off and leave the current session. The date filter will always reset back to the current week when you log off.




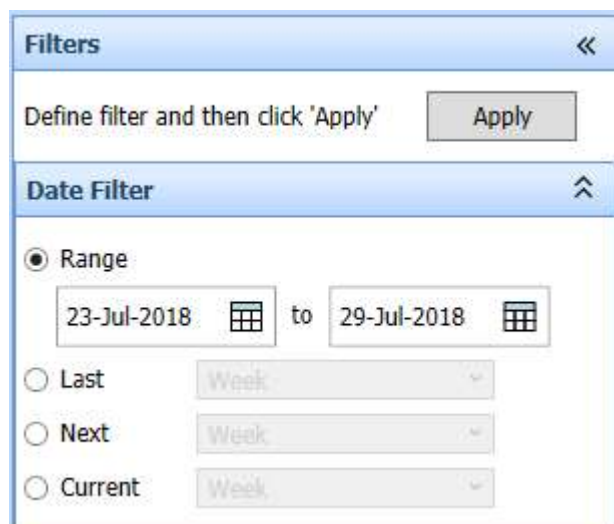
*The Filters pane in the GPWT*

## Date Filter

When you first access the module, the GPWT will display information for the current week. The time period the data in the tool refers to is displayed along the top.

### 1. Access GPWT.


- Click , hover over **Appointments**, then select **General Practice Workload Tool**.
- ### 2. In the Filters pane, select **Date Filter**.

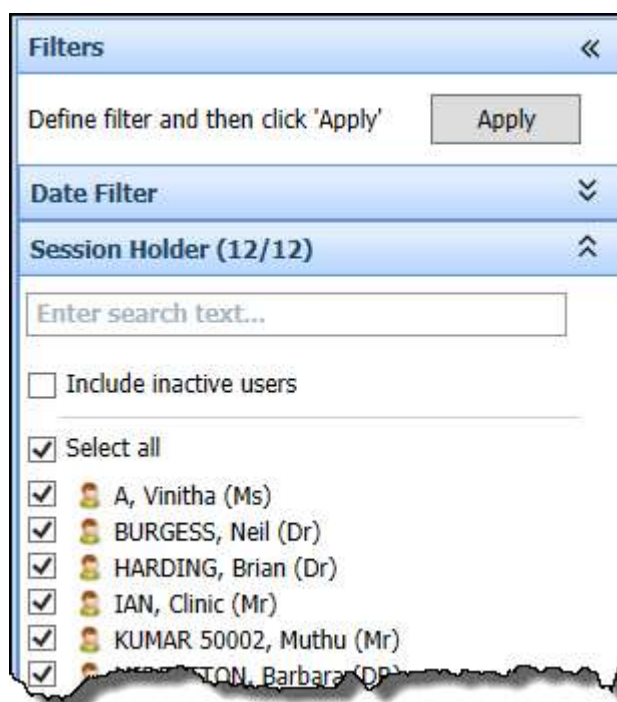


3. Select from one of the following options:
  - a. **Range** (from and to)
  - b. **Last** (week, month, quarter, year)
  - c. **Next** (week, month, quarter, year)
  - d. **Current** (week, month, quarter, year)
4. At the top of the Filters pane, click **Apply** to populate the GPWT.

The time periods correspond to the calendar year. For example, last year displays data from the last calendar year (1st Jan - 31st Dec), last quarter displays data from the last full quarter (e.g. 1st Apr - 30 Jun), last month displays data from the last full month and last week displays data for the last full week. This also applies to the future time periods.

## Session Holder

1. Access GPWT.  
Click , hover over **Appointments**, then select **General Practice Workload Tool**.
2. In the Filters pane, select **Session Holder**.



All session holders are selected by default.

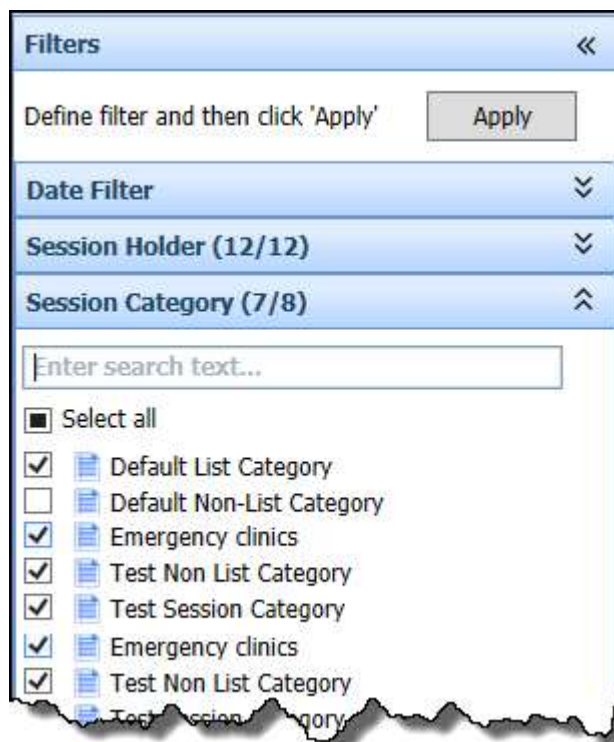
3. Select the session holders you wish to be included in the report and deselect any user, e.g. dummy users, that you do not want to be included. You can enter search text to narrow down the list by name, and also include inactive users who may have left the organisation if required.
4. At the top of the Filters pane, click **Apply** to populate the GPWT.

## Session Category

1. Access GPWT.


Click , hover over **Appointments**, then select **General Practice Workload Tool**.

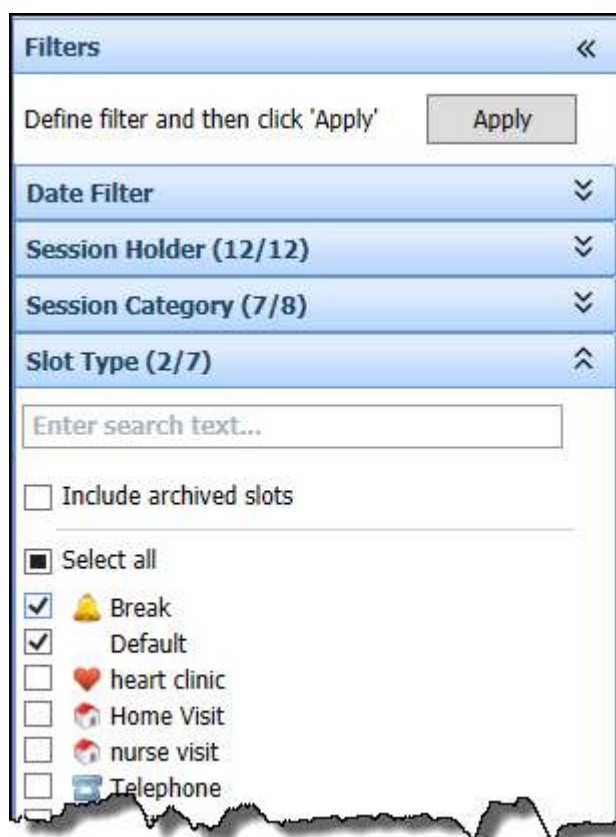
2. In the Filters pane, select **Session Category**.



3. Select the session categories you wish to be included in the report and deselect any category that you do not want to be included. You can enter search text to narrow down the list by category name.
4. At the top of the Filters pane, click **Apply** to populate the GPWT.

## Slot Type

1. Access GPWT.  
Click , hover over **Appointments**, then select **General Practice Workload Tool**.
2. In the Filters pane, select **Slot Type**.




3. Select the slot types you wish to be included in the report and deselect any slot type, e.g. break, that you do not want to be included. You can enter search text to narrow down the list by slot type, and also include archived slot types if required.
4. At the top of the Filters pane, click **Apply** to populate the GPWT.

## Exporting and printing the GPWT

You can export or print your data to keep and view your results at a later date.

To print the dashboard select **Print** on the top ribbon in the GPWT module. This prints out in graphical form.

All sections of the GPWT are expanded and printed. If you've collapsed any sections using the  icon, these will appear on the printout.

To export the GPWT select **Export** then **To CSV file** to export to your computer. You can open the exported file in Microsoft excel to view the raw data used to generate the grids and charts.

The exported file shows the raw data that generates the GPWT in EMIS Web. This may be useful if you want to find out which patient's have generated your DNA'd appointments data



as patient EMIS numbers are included in the raw data for DNA'd appointments.

## Feedback

NHS England welcome feedback on the GPWT in EMIS Web. If you'd like to leave feedback please contact [england.gpaccess@nhs.net](mailto:england.gpaccess@nhs.net).

## Further Reading

- NHS England committed to providing an automated appointment measuring interface in the General Practice Forward View (published April 2016).
- In the longer term, use of the tool will be supported by the NHS England General Practice Development Programme, aimed at responding to the opportunities and challenges identified in the General Practice Forward View and building capacity for improvement directly with practices.