

# CRIS System Management Overview

Following the CRIS system deployment and initial early life support the standard day to day running and housekeeping on the CRIS system is the responsibility of Trust RIS system manager(s). Consequently, it is accepted that they should develop a comprehensive understanding of all day-to-day workings of the CRIS application covering all relevant areas in which the system is used.

It should be noted that the following day tasks are generic and intended to only provide guidance on typical day to day System Management and Housekeeping tasks. This list should not be considered exhaustive since it is accepted that all customers have their own local Standard Operating Practices and Service Objectives in addition to differing CRIS Modules and system configuration. Wellbeing Software cannot provide context specific guidance for all eventualities. It is therefore recommended that each customer should undertake regular reviews of current CRIS system workflow, in addition to local service KPI's and SLA's which will then be used to form the basis of, and priority for each CRIS Housekeeping task.

## GENERAL CRIS SYSTEM ADMINISTRATION TASKS

How to undertake the following tasks are covered in RIS\_CRIB280\_System\_Management\_Manual and CRIS\_CRIB\_VR\_276\_Voice\_Recognition\_12 CRIB sheets respectively:

- ✓ **Monitoring of 'View log' and deciding which are activities that need actioning** – i.e. PAS errors where the Referrer or Referrer location is not recognised on CRIS and must be added to the System Management Tables.
- ✓ **Monitoring of 'Interface Statuses' and checking that there are no queued messages via "Message Manager."**

Please note: If this utility is not active / available via your CRIS system please refer this issue to the CRIS Helpdesk via your standard route (i.e. Trust IT, Prime Contractor or direct via the Wellbeing Software Helpdesk)

- ✓ **Creation and management of all Staff Tables including but not limited to:**
  - CRIS User Access and Resetting Passwords
  - Adding, maintaining and end dating Referrers / Referrer Links and updating any affected patient events.
- ✓ **Creation and management of all Place Tables including but not limited to:**
  - Adding, maintaining and end dating Referral Sources and updating any affected patient events.
- ✓ **Creation and management of all Other Tables including but not limited to:**
  - Ensuring Appointment Diaries are created, maintained and copied forward in an appropriate and timely manner.
  - Adding, maintaining and end dating Examination Codes and updating any affected patient events.
  - Adding, maintaining and end dating Vetting Protocols

Please note: Any tasks relating to Referral Sources, Referrers and Examination codes will also need to be considered in relation to downstream and upstream systems like OCS, PACS, EPR, PAS and any reciprocal code updates and mapping that may be required.

- ✓ Setting up and monitoring the Dragon Language and Acoustic Optimizers centrally to run on a weekly basis - *only applicable if Dragon VR is in use.*
- ✓ Checking for locked dictations - *only applicable if Digital Dictation is in use.*
- ✓ Checking for partial dictations and ensuring these are actioned - *only applicable if Digital Dictation is in use.*
- ✓ Deletion of old dictations - *only applicable if Digital Dictation is in use and dependent on how much space the Trust has allocated for storing dictations.*

## PATIENT CORRECTION TASKS

The following RIS tasks are detailed via the CRIS\_CRIB\_CM\_285\_Patient\_Correction\_Procedure.doc CRIB sheet:

- ✓ Patient Correction due to the wrong patient being Linked (PAS) to the wrong CRIS record.
- ✓ Patient Correction due to the wrong event being placed on the wrong patient either as a result of the previous issue, or independently.
- ✓ Ensuring that any patients with temporary IDs are linked back to PAS records.
- ✓ Duplicate Merging where applicable.
- ✓ Linking orphaned orders or unlinking incorrectly linked orders – *only applicable if order communications system is in use.*

## SERVICE DELIVERY TASKS

How to undertake the following tasks are covered in the relevant Module CRIB sheets – i.e. Vetting, Appointments, Post Processing, and Clinical Reporting etc.

- ✓ On-going monitoring of **CRIS Worklists** including but not limited to the following:
  - Pre-Vetting Request and Orders and assigning to appropriate Clinicians or Vetting Groups.
  - Ensuring Vetting Lists have been processed in a timely fashion.
  - Ensuring that all patients are given appointments from requests, waiting and planned lists as per local agreed timescales in line with national waiting time directives.
  - Vetting DNA's and Rejected Requests.
  - Ensuring that all post processing is completed to facilitate reporting and IRMER guidelines.
  - Ensuring that all reporting has been allocated to an appropriate Clinician or Reporting Group.
  - Checking that all work has been reported within locally agreed timescales.
  - Checking that all work has been verified in a timely manner.
  - Making sure that any patients that have been put 'on hold' are actioned appropriately - i.e. Vetting on Hold or Reporting on Hold if in use.

## ISSUE MANAGEMENT TASKS

Additionally, when reporting system issues/problems to the CRIS Helpdesk via the standard route (i.e. Trust IT, Prime Contractor or direct via the Wellbeing Software Helpdesk), the RIS system manager should undertake a reasonable amount of investigation into each issue/problem prior to contacting the helpdesk. This is defined as follows:

- ✓ **Providing key details relevant to the issue/problem, for example:**
  - CRIS Number
  - Patient Demographics (Surname, Forename, DOB)
  - Event Details (Attendance/Appointment date, Event number: E-123456)
  - Any other relevant details (Time and Date of the Incident)
  - Details of the relevant platform – i.e. Live, Test or Train
- ✓ **Establishing information regarding the circumstances in which the issue/problem occurs or has occurred, for example:**
  - Encouraging the user to demonstrate the problem/issue, or attempting to re-create the reported issue/problem to better enable you to report the incident
  - Providing a summary of the Incident
  - Providing a full and exact replication of the steps that lead to the fault
- ✓ **Considering any other factors or patterns, for example:**
  - Where relevant, confirmation that the network isn't impacting performance:
  - Are any other applications affected?
  - Number of users affected and/or are any other trusts in the consortium affected - Should include site code/user id etc. if applicable?
  - Number of terminals affected - Should include Site code/terminal id if applicable?
- ✓ **Providing any relevant error message, for example:**
  - CRIS Error Message Text
  - CRIS Java Log files
  - Dragon Log Files
- ✓ **Citing any Clinical Safety issues with evidence / justification for this classification**
- ✓ **Ensuring that all modification or development requests are made in consideration of Trust wide working practice (i.e. Will other sites be affected?)**
- ✓ **Providing all appropriate key contact details (Name, role, telephone, e-mail etc.)**

The RIS System Manager should however be aware that CRIS System Management may be restricted to relevant elements of the system which will not affect the overall Consortium. If you wish to understand the Wellbeing Software Service Process in detail, please refer to your Service Model documentation. Please contact the Wellbeing Software Service desk or your Client Manager who will be able to provide this.

## Document Control

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Issue	Date	Author / Editor	Details of Change
V1.0	22/02/2017	Emma Savage-Mady	First Issue
V1.1	17/07/2017	Emma Savage-Mady	Amended issue in conjunction with AH/AD
V1.2	22/01/2019	Emma Savage-Mady	Minor typo amendment and rebranding
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