

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

In preparation for the migration of data from RiO to SystmOne the following reports have been designed for you to retrieve patients with missing data items and update their record on RiO.

1. **DQ SEPR ALL DQ by Team**
2. **DQ SEPR Open IP Referrals Discharged Pts**
3. **DQ SEPR Date of Death Match To Spine**
4. **DQ SEPR Multiple Registrations (CSVExp)**
5. **DQ SEPR Multiple Registrations**
6. **DQ SEPR Missing NHS Numbers**
7. **DQ SEPR Open Referrals (CSVExport)**
8. **DQ SEPR Open Referrals**
9. **DQ SEPR Unoutcomed Appt (CSVExport)**
10. **DQ SEPR Unoutcomed Appt**

Guidance on how to access and run the reports is available below.

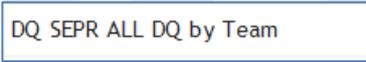
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For Single EPR (SEPR) Data Cleansing

DQ SEPR ALL DQ by Team – this report gives an overview of all the SEPR reports below filtered by Service and/or Team and provides a total figure, at a glance, of patients extracted to the report.

To Run the Report

Select the  Reports icon within RiO.

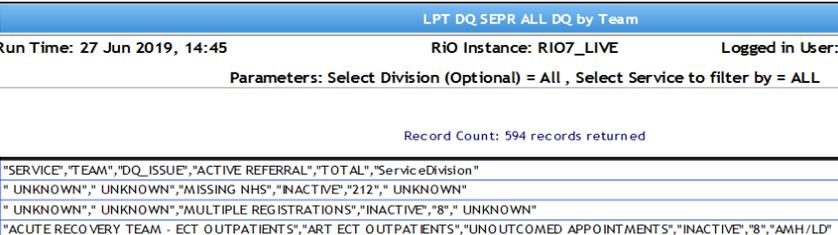
Click on 

The following window is displayed:



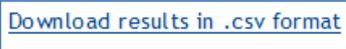
Use the filters if required and select OK.

The following window is displayed:



[Download results in .csv format](#)

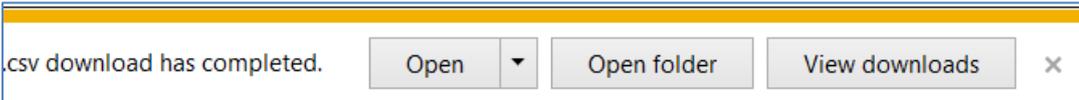
Right click the hyperlink and then select 'Save Target As..' to download the file.

Right click on  and select **Save target as.....**



Save the report to your preferred location.

The following message will be displayed:



Select Open.

The report will be displayed in Excel format to enable you to filter the data accordingly.

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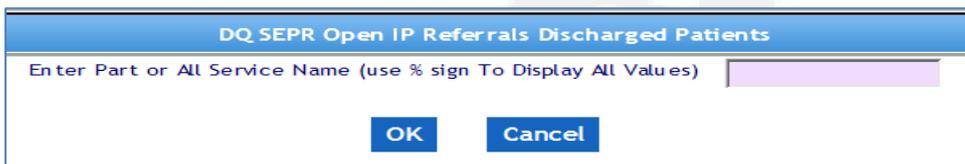
DQ SEPR Open IP Referrals Discharged Pts – this report displays patients that have been discharged from the ward but the referrals hasn't been closed down on RiO.

To Run the Report

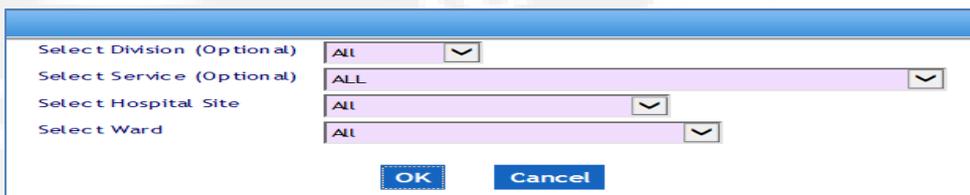
Select the  Reports icon within RiO.

Click on 

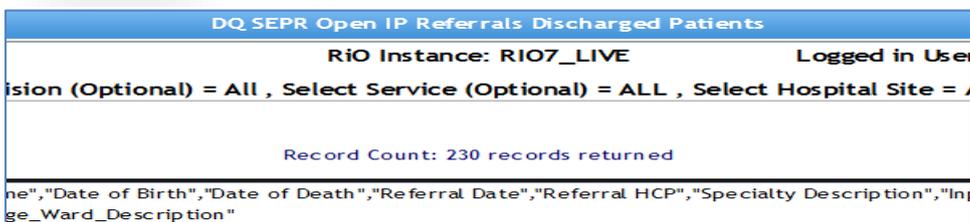
The following window is displayed:

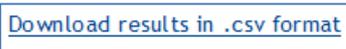


Enter a value to filter or % to display all – Click OK. The following window will be displayed



Complete the filters as required and click OK



Right click on  and select **Save target as.....**



Save the report to your preferred location.

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For Single EPR (SEPR) Data Cleansing

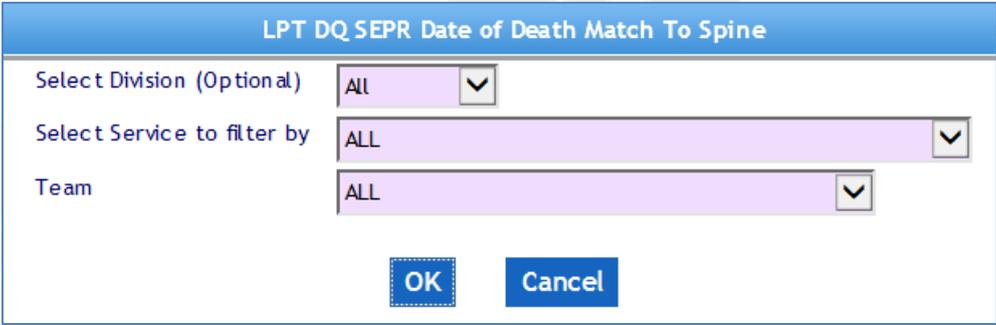
DQ SEPR Date of Death Match To Spine – this report has been designed to extract patients that have either been recorded as deceased within RiO but the details on the Spine do not match, or recorded as deceased on the Spine but not on RiO. Further investigation may be required to ensure an accurate amendment of the client's record.

To Run the Report:

Select the  Reports icon within RiO.

Click on [DQ SEPR Date of Death Match To Spine](#)

The following window is displayed:



LPT DQ SEPR Date of Death Match To Spine

Select Division (Optional) All

Select Service to filter by ALL

Team ALL

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

Click OK.

Right click on [Download results in .csv format](#) and select **Save target as.....**



Save the report to your preferred location.

The following message will be displayed:



Select Open.

The report will be displayed in Excel format to enable you to filter the data accordingly.

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

DQ SEPR Multiple Registrations – this report has been designed to extract patients that have been recorded with very similar details resulting in potential multiple registrations. Further investigation is required to ensure an accurate merge of the client records.

To Run the Report:

Select the  Reports icon within RiO.

Click on 

The following window is displayed:



LPT DQ SEPR Multiple Registrations

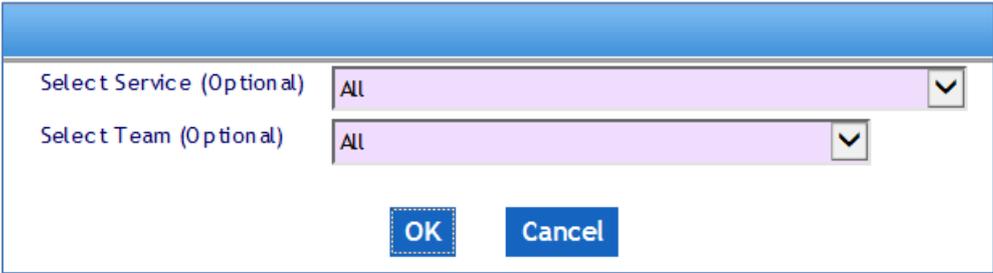
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) All

Select Team (Optional) All

OK Cancel

Click OK.

The report will be displayed with the selected criteria.

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

DQ SEPR Multiple Registrations (CSVExp) – this report has been designed to extract patients that have been recorded with very similar details resulting in potential multiple registrations. Further investigation is required to ensure an accurate merge of the client records. This report has been designed to open in excel format to allow manual editing of the data.

To Run the Report:

Select the  Reports icon within RiO.

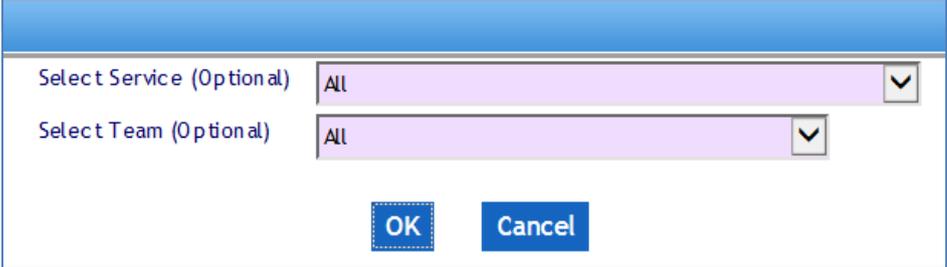
Click on 

The following window is displayed:



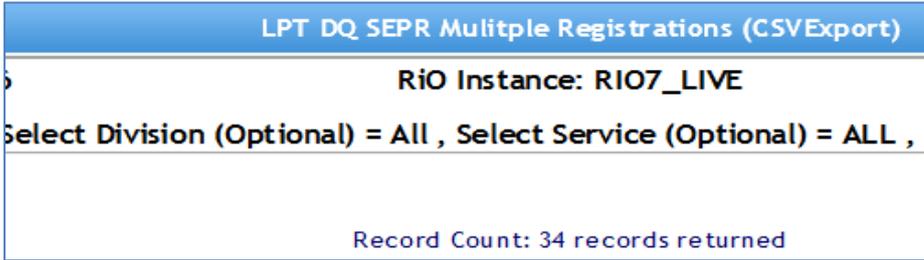
Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



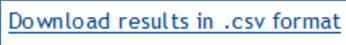
Click OK.

The following window will be displayed:



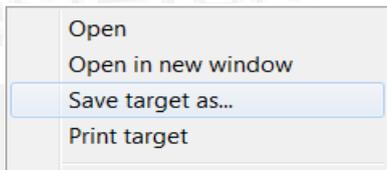
[Download results in .csv format](#)

Right click the hyperlink and then select 'Save Target As..' to download the file.

Right click on  and select **Save target as.....**

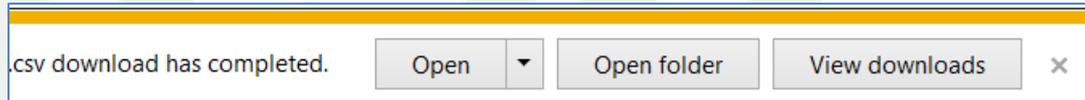
RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing



Save the report to your preferred location.

The following message will be displayed:



Select Open.

The report will be displayed in Excel format to enable you to filter the data accordingly.

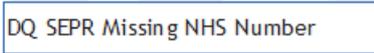
RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

DQ SEPR Missing NHS Numbers – this report displays all patients registered without a NHS Number.

To Run the Report:

Select the  Reports icon within RiO.

- Click on 

The following window will be displayed:



LPT DQ SEPR Missing NHS Number

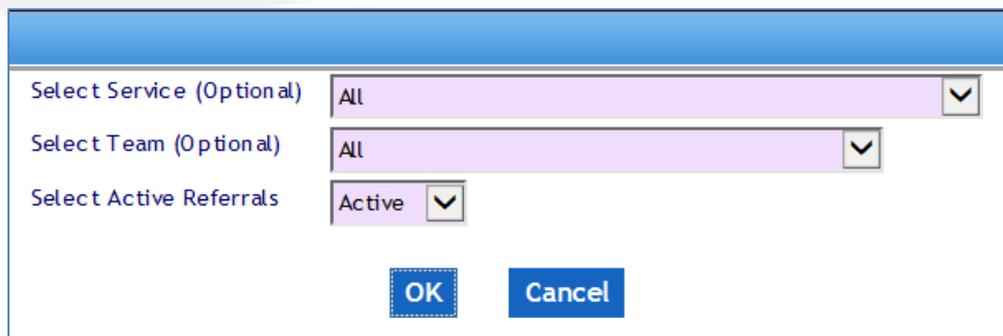
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) All

Select Team (Optional) All

Select Active Referrals Active

OK Cancel

Click OK.

The report will be displayed with the selected criteria.

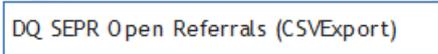
RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

DQ SEPR Open Referrals (CSVExport) – this report displays current patients with an Open Referral but has no contact recorded against that referral in the last 6 months. This report has been designed to open in excel format to allow manual editing of the data.

To Run the Report:

Select the  icon within RiO.

- Click on 

The following window will be displayed:



LPT DQ SEPR Open Referrals (CSVExport)

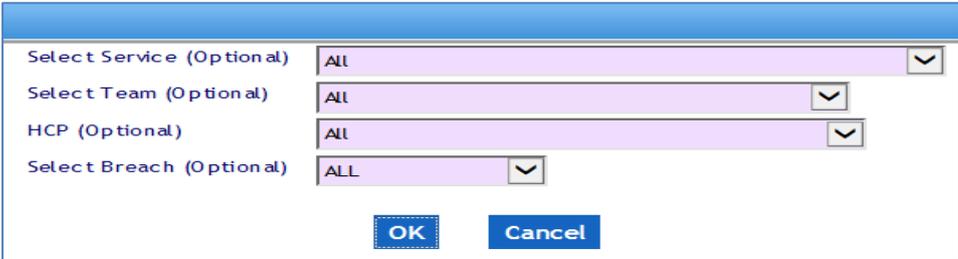
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) ALL

Select Team (Optional) ALL

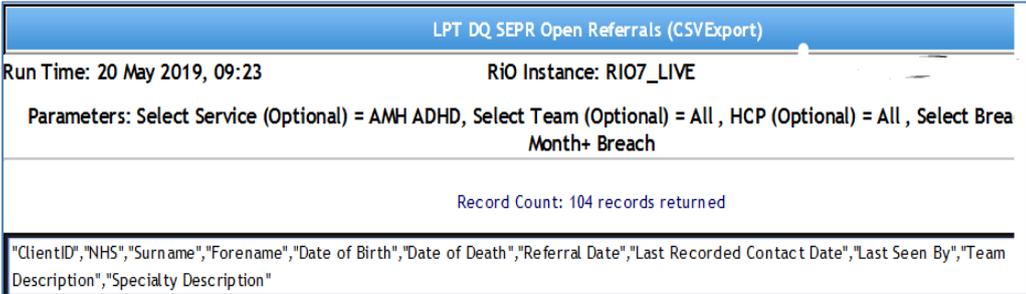
HCP (Optional) ALL

Select Breach (Optional) ALL

OK Cancel

Click OK.

The following window will be displayed:



LPT DQ SEPR Open Referrals (CSVExport)

Run Time: 20 May 2019, 09:23 RiO Instance: RIO7_LIVE

Parameters: Select Service (Optional) = AMH ADHD, Select Team (Optional) = All, HCP (Optional) = All, Select Breach (Optional) = Month+ Breach

Record Count: 104 records returned

"ClientID","NHS","Surname","Forename","Date of Birth","Date of Death","Referral Date","Last Recorded Contact Date","Last Seen By","Team Description","Specialty Description"

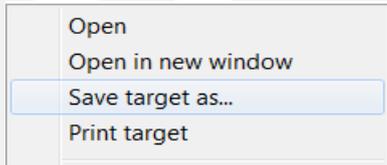
[Download results in .csv format](#)

Right click the hyperlink and then select 'Save Target As..' to download the file.

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

Right click on [Download results in .csv format](#) and select **Save target as.....**



Save the report to your preferred location.

The following message will be displayed:



Select Open.

The report will be displayed in Excel format to enable you to filter the data accordingly.

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

DQ SEPR Open Referrals – this report displays current patients with an Open Referral but has no contact recorded against that referral in the last 6 months.

To Run the Report:

Select the  Reports icon within RiO.

- Click on 

The following window will be displayed:



LPT DQ SEPR - Open Referrals

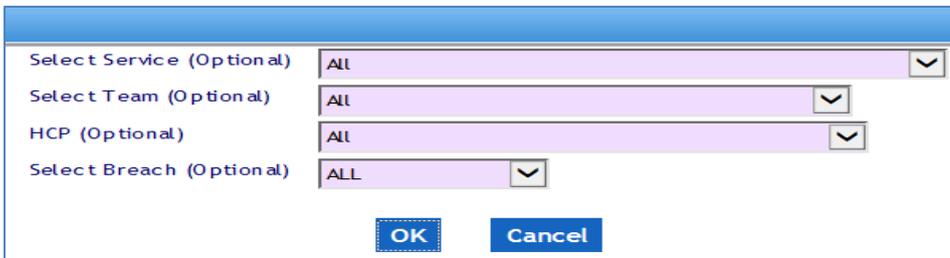
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) ALL

Select Team (Optional) ALL

HCP (Optional) ALL

Select Breach (Optional) ALL

OK Cancel

Click OK and the report will be displayed.

RiO Process to Access and Run Reports

For Single EPR (SEPR) Data Cleansing

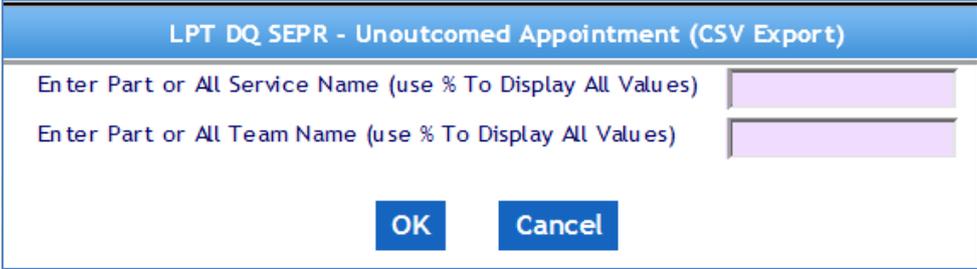
DQ SEPR Unoutcomed Appt (CSVExport) – this report displays patients with an appointment recorded in the past that has not been finalised with an outcome e.g. Attended and Seen, DNA, Cancelled by Patient etc. This report has been designed to open in excel format to allow manual editing of the data.

To Run the Report:

Select the  Reports icon within RiO.

- Click on 

The following window will be displayed:



LPT DQ SEPR - Unoutcomed Appointment (CSV Export)

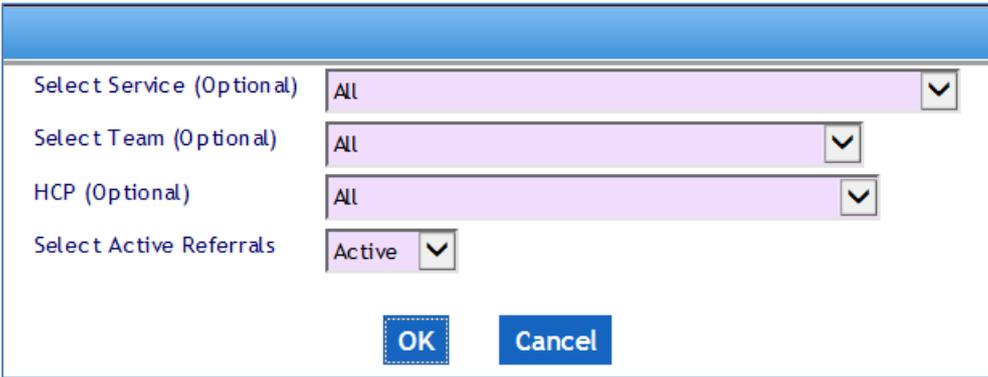
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) All

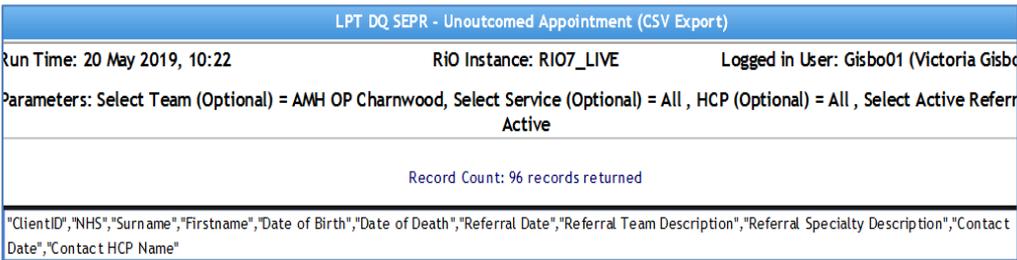
Select Team (Optional) All

HCP (Optional) All

Select Active Referrals Active

OK Cancel

The following window will be displayed:



LPT DQ SEPR - Unoutcomed Appointment (CSV Export)

Run Time: 20 May 2019, 10:22 RiO Instance: RIO7_LIVE Logged in User: Gisbo01 (Victoria Gisbo)

Parameters: Select Team (Optional) = AMH OP Charnwood, Select Service (Optional) = All , HCP (Optional) = All , Select Active Referrals = Active

Record Count: 96 records returned

"ClientID","NHS","Surname","Firstname","Date of Birth","Date of Death","Referral Date","Referral Team Description","Referral Specialty Description","Contact Date","Contact HCP Name"

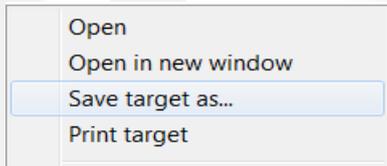
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[Download results in .csv format](#)

Right click the hyperlink and then select 'Save Target As..' to download the file.

Right click on [Download results in .csv format](#) and select **Save target as.....**



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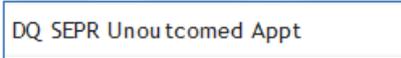
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DQ SEPR Unoutcomed Appt – this report displays patients with an appointment recorded in the past that has not been finalised with an outcome e.g. Attended and Seen, DNA, Cancelled by Patient etc.

To Run the Report:

Select the  Reports icon within RiO.

- Click on 

The following window will be displayed:



LPT DQ SEPR Unoutcomed Appointments

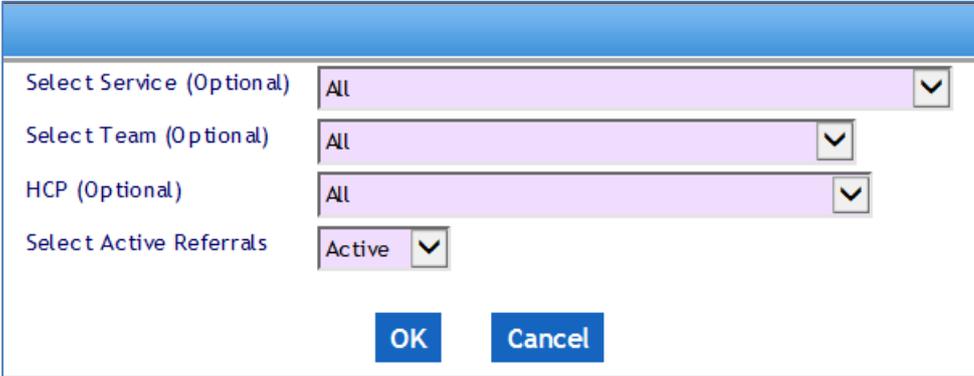
Enter Part or All Service Name (use % To Display All Values)

Enter Part or All Team Name (use % To Display All Values)

OK Cancel

Enter part or the entire team/service name or enter % for a full list. Click OK.

The following window will be displayed to add further filters if required:



Select Service (Optional) All

Select Team (Optional) All

HCP (Optional) All

Select Active Referrals Active

OK Cancel

Click OK and the report will be displayed.