

# Focussed on integrated care

Developing healthcare solutions in alignment with market need and NHS policy.

## EMIS Health

The EMIS Health segment comprises business areas where revenues are generated from NHS organisations. This includes the primary, community and acute A&E markets and operates under the EMIS brand.

## Market shares

EMIS maintained its UK GP market leadership position with a market share of 57% (2019: 57%). The Group holds a joint market leadership position in Acute A&E at 21% (2019: 23%) and the number two market position in community at 20% (2019: 21%).

## NHS primary care frameworks

EMIS transitioned to the GP IT Futures framework in January 2020. The framework governs the provision of the majority of EMIS Group's clinical IT system-related services to GPs in England and is due for review in March 2023. The related Digital Buying Catalogue, which facilitates procurement, will run on an ongoing basis.

EMIS developed a number of enhanced features in EMIS Web during 2020 in response to the framework, including FHIR capability, an upgrade to SNOMED CT and integration with the Medicines and Healthcare products Regulatory Agency (MHRA) Yellow Card for reporting medication contraindications.

Framework mini-tender processes are anticipated to occur on a regular basis through the coming years in both Scotland and England. This has reinforced the clear focus of the Group to provide products that exceed customer expectations and to excel in customer service and delivery.

In Scotland, as an approved supplier on the NHS National Services Scotland (NSS) framework, EMIS continues to work closely with NSS to deliver the technology to support its health and care strategy. EMIS continues to keep the existing GP system, PCS, up to date for its Scottish customers, such as adding new clinical code terms to support the management of Covid-19, raising flags for patients on the shielding list and delivering population data for Public Health Scotland.

In Northern Ireland, EMIS has secured an extension to the GP Systems of Choice (GPSoc) framework until April 2022 so that it can continue to provide GP systems under the existing arrangements. EMIS is working on various Northern Ireland-specific enhancements to EMIS Web and continues to support its Covid-19 response.

EMIS has agreed a further extension to provide primary care systems in Wales as NHS Wales Informatics Service (NWIS) published its new framework in March 2021. EMIS and NWIS continue to work together on strategic projects to accelerate the digitisation of unscheduled care, such as refreshing the technology infrastructure.

40m patient records are held in our hosted systems

### Continued focus on EMIS-X

The development of EMIS-X continues. The development roadmap is linked to strategic customer priorities, with close alignment of the product, development and delivery functions. EMIS's 89-strong clinical team (2019: 71) continues to play a vital role throughout the development process, ensuring that EMIS's products and systems deliver what front line clinicians need on a daily basis.

Working with technology partners, EMIS-X will bring to the market the very best combination of in-house and partner technology as the platform for all future EMIS clinical systems.

### Improving customer experience

EMIS is focussed on its relationships with customers in all major markets, with the intention that all customer touchpoints provide a high-quality experience for the end user.

In 2019, EMIS upgraded its support and service platform to ServiceNow, enabling support to be delivered digitally as well as through more traditional routes such as ringing into a call centre. During 2020 usage of digital support channels increased, with 66% of support incidents being logged digitally by the end of the year (2019: 30%).

EMIS's support services will continue to improve during 2021. The Group's new in-house dashboard will give a detailed insight into support performance, helping to pinpoint emerging trends before they become a problem and enabling more proactive management of issues. It will give a greater oversight of call and digital chat statistics, to highlight where any improvements can be made to make customer service even better.

### Enhanced features for Symphony customers

EMIS continues to develop new functionality into existing systems, particularly to enable interoperability.

In September 2020, Symphony became the first system accredited by NHS Digital to support direct electronic appointment booking from 111. Call handlers send referral appointments directly into an Emergency Department, urgent treatment centre or same day emergency care environment using Symphony. This supports the NHS Long Term Plan for the 111 service to become the first line of defence for urgent care.

As well as integration with 111, Symphony 3.0 was updated to enable improved workflows and help manage social distancing.

## Industry insights



## Remote consulting will continue

### Dr Rob Walter

Clinical Intelligence Director, EMIS Group

Dr Rob Walter is a practising GP and the Clinical Intelligence Director at EMIS, working closely within the clinical team to ensure that EMIS's systems meet customers' needs perfectly. He has been working with EMIS for more than 15 years and has been a practising GP in Dumfries for 20 years. Rob brings direct front line experience into the business and last year shared his insight into how primary care has adapted and evolved during the pandemic.

"In March 2020 our practice quickly adopted a process of telephone triage for all appointments, ensuring a safe and accessible service. We were able to conclude most consultations over the phone, supplementing with video calls or emailed photographs, with very few patients requiring further assessment face-to-face.

"By 2021 we are now in a well-established rhythm, workload has increased and consultations are increasingly more challenging as we deal with more complex pent up social and mental health issues, lacking the non-verbal clues that are an integral part of a traditional consultation.

"The "Dr Finlay" style family doctor is increasingly scarce, particularly in busy metropolitan areas with younger mobile service users. General practice will never be the same again and remote consulting will continue to be the mainstay of our consultations.

"I speak regularly with my EMIS colleagues to discuss how we can develop our systems to help as primary care evolves. I've written a number of internal communications articles for the rest of the business to share the journey of the past 12 months, helping them understand the reality of delivering care digitally and my thoughts on the challenges going forward.

"Our challenge as an IT company is to support practices during this rapid and significant transition so that the human side of medicine is not lost, and vulnerable patients are not digitally excluded."