

V1
March
2025



North West London

SystemOne Smartcard Support

PRIMARY CARE SYSTEMS

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Background

Over the last couple of months, there have been some changes in smartcard roles. This is due to old smartcards role coming to an end. These entries were generated by an old system, while the new roles that the RA team have put on to the smart card should not run out. Unfortunately, this means that you might have had a team member in your surgery that had one of these old profiles, which the RA team have now updated. This may mean that their old role may now be archived off and you may be set up with a new log in, that does not have everything set up. This guide will support you with updates required.

Support

If you have been through the manual and still have questions, concerns or issues, please do not hesitate to contact the NWL Service Desk via the Self-Serve Portal: [Click Here](#)

Not Exhaustive List

This manual is not an exhaustive list of items that may have been affective. You might find that there are other parts of the system we may have missed. If you do find these, please let us know, so we can update this

SystemOne User Accounts

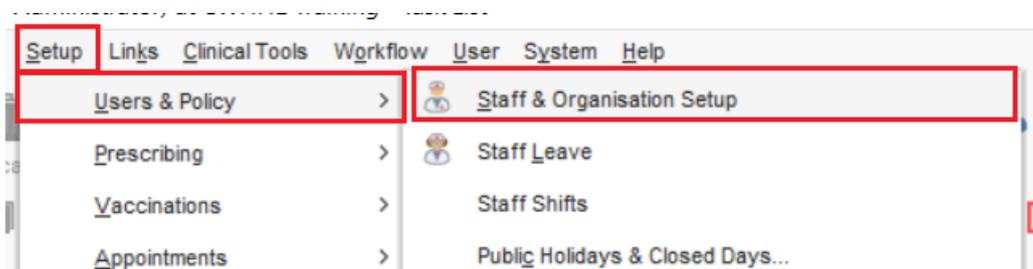
Once a user's smartcard has been reinstated, a **new** user profile will be created in SystemOne. and the existing profile will have been Archived (moved to the Archived Staff tab of the Staff & Organisation Setup screen)

The new profile will require a previous setting, this guide will enable you to check and set the settings to the new profile and remove the setting from the existing account

Firstly, we will need to unarchive the user's existing account to capture previous settings to enter into the new profile.

Unarchiving a user account

Navigate to Setup > User & Policy > Staff & Organization Setup from the main menu



1. Select the Archived Staff tab and click Yes to confirm that you want to continue.
2. Select the name of the former member of staff and click Unarchive Staff.
3. Click Yes to confirm that you want to continue.
4. The staff member is reinstated to the Staff tab of the Staff & Organisation Setup screen. If you cannot see them, click Refresh or press F5 to update the screen.
5. Once you have unarchived the user, GP codes, National ID, PPA IDs will need to be removed from this existing account and re-entered into the new profile.

ICE

If a GP requests into Hillingdon Hospital and has lost access to ICE please use the access form below with the GP details including GMC and GMP number for access to be re-instated.

If you request into any other Hospital Trust and are experiencing any access issues, please use the contact email addresses in the below form to contact the relevant Team for investigation.



NHS_North_West_L
ondon_Radiology_a

Prescribing

You may find that a user does not have a PPA ID on the log in.

If a user is a GP with a PPA ID, you will need to remove it from any other users that use this, in order to change it to a new GP, for example prescription clerks.

Once you have removed the PPA ID from other users, you will need to make a note of the PPA ID that is on the old log in and then remove it. You will then need to add it to the new log in. You can then re-add this to the other users by click on the “Using PPA ID” button

The screenshot shows the 'Amend Staff Details' interface. At the top, there are navigation tabs: 'Global Settings', 'Local Settings' (selected), 'Local Access Rights', 'Skill Sets', 'Additional Languages', and 'Additional Details'. Below this is the 'Employment Details' section. It contains several fields: 'Employment role' (Systems Support Access Role), 'Telephone no. / ext.', 'Pager number', 'Employment start date' (21 Oct 2016), 'GP local codes' (with an 'Edit Local Codes' button), 'PPA ID' (highlighted with a red box), 'Using PPA ID' (with 'Set' and 'Clear' buttons, where the 'Set' button is highlighted with a red box), 'Using GMC Number' (with 'Set' and 'Clear' buttons), 'Preferred appointment duration' (10 Minutes), and 'Start/end location'. Below the 'Employment Details' section is the 'Activation' section, which includes a checked checkbox for 'Logon at this organisation is enabled', an unchecked checkbox for 'Automatically disable this logon if not used for 56 hours (this number can be changed via preferences)', and a 'Reset Timer' button.

Local Codes

When checking a GP role, you may also need to make sure that the Local Code (Capitation) is moved across. To do this, go into the old log on, and go to Local Settings. The local codes will show.

The screenshot shows the 'Amend Staff Details' page with the 'Local Settings' tab selected. The 'GP local codes' field is highlighted with a red box and contains the text 'BD 253, ZZ3 121, LNB 313, Q32 11'. To the right of this field is an 'Edit Local Codes' button, which is also highlighted with a red box. Other fields include 'Employment role' (GP Partner), 'GP Connect role', 'Telephone no. / ext.', 'Pager number', 'Employment start date' (04 May 2016), 'PPA ID' (512124), 'Using PPA ID', 'Using GMC Number', 'Preferred appointment duration' (10 Minutes), and 'Start/end location'.

Click on the Edit Local Codes button. The Dialog box will show. Make a note of the health authority and the codes, as you will need these to put on to the new log in. Once you have noted them down, you can either click on the remove button, or just delete the codes out of the boxes.

The screenshot shows the 'GP Local Code Setup' dialog box. It contains a list of health authorities and their codes, each with a search icon and a close icon. The list is as follows:

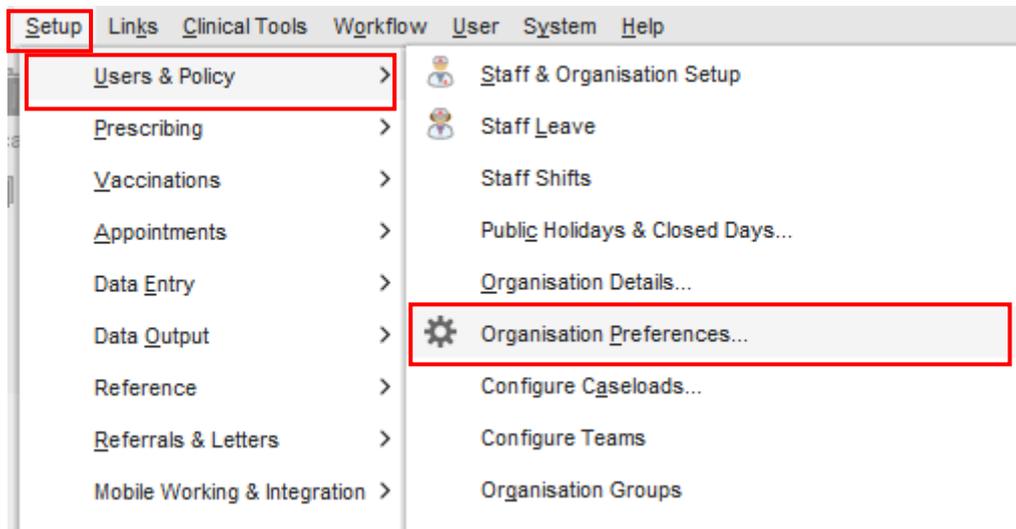
| Health authority | Code |
|------------------------------------|------|
| Bedfordshire (BD) | 253 |
| Training Ha (ZZ3) | 121 |
| Redbridge and Waltham Forest (LNB) | 313 |
| Yorkshire and the Humber SHA (Q32) | 11 |

At the bottom of the dialog box, there are 'Add' and 'Remove' buttons, and 'Ok' and 'Cancel' buttons.

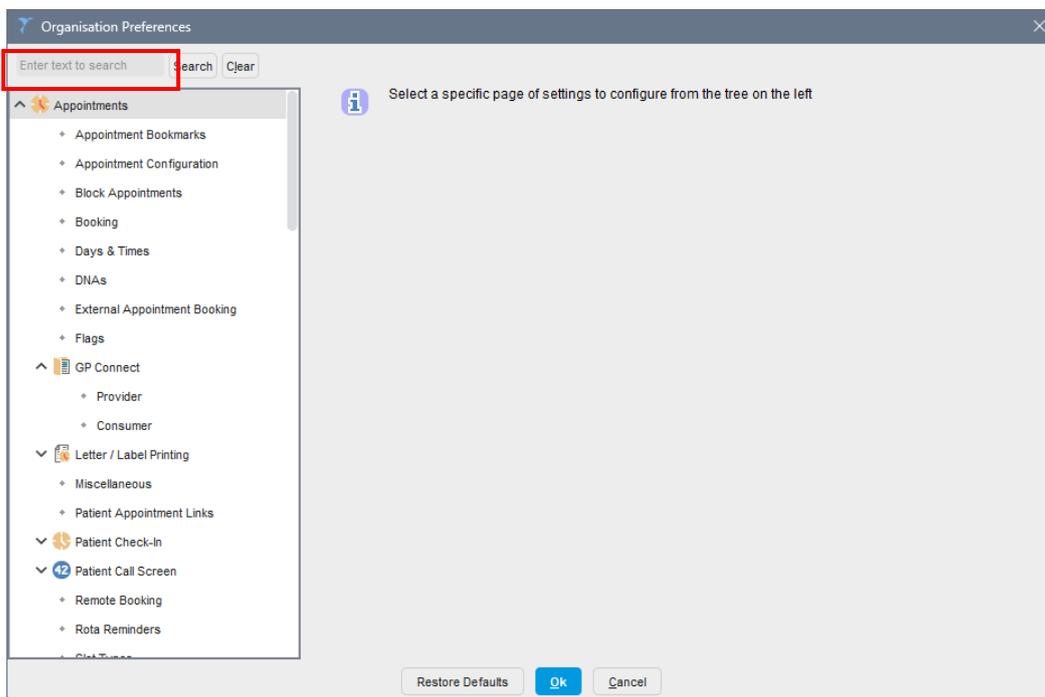
Once you have completed this, you can now re-add them on to the new log on.

Organisation Preferences

1. To access Organisation Preferences, you will require System Administrator access. Select Setup > Users & Policy > Organisation Preferences from the main menu.

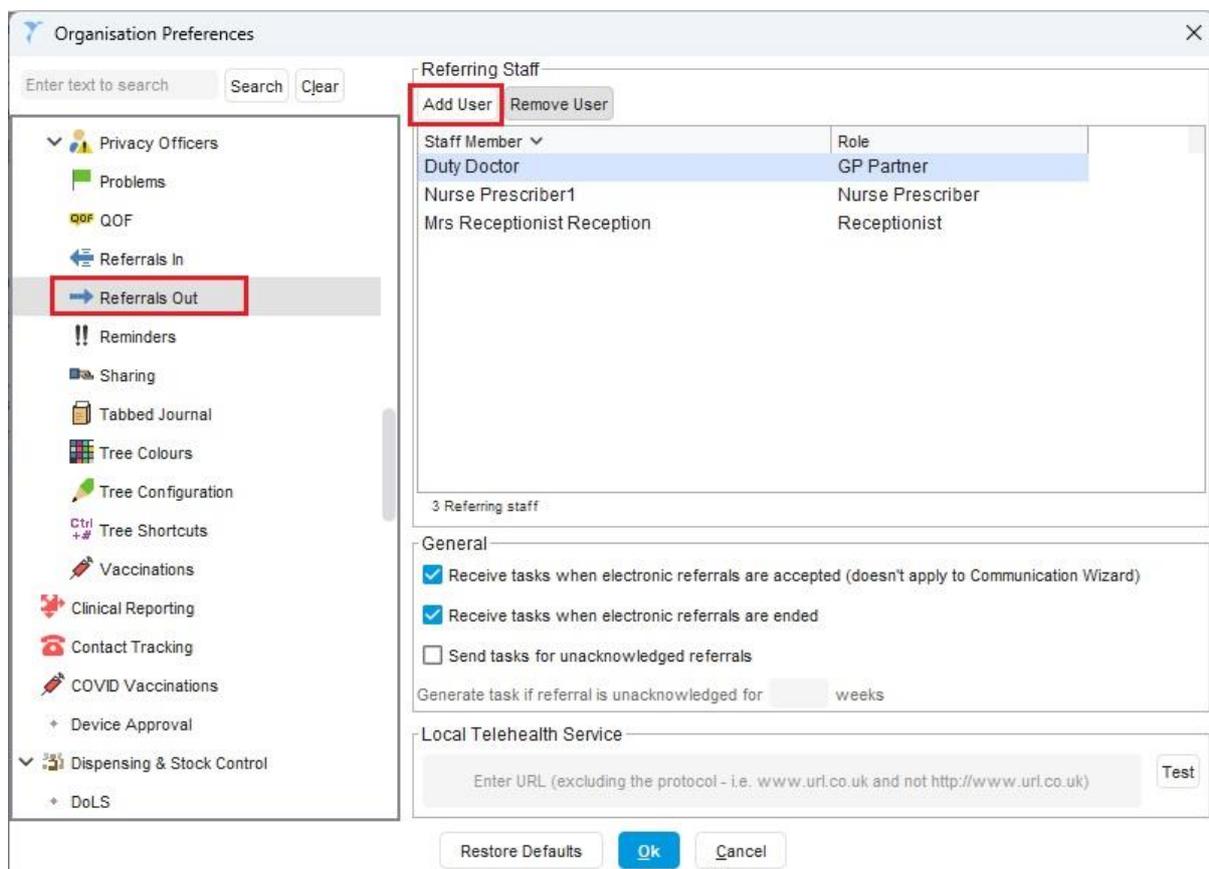


2. Find all settings in organisation preferences using Search.



Referrals Out

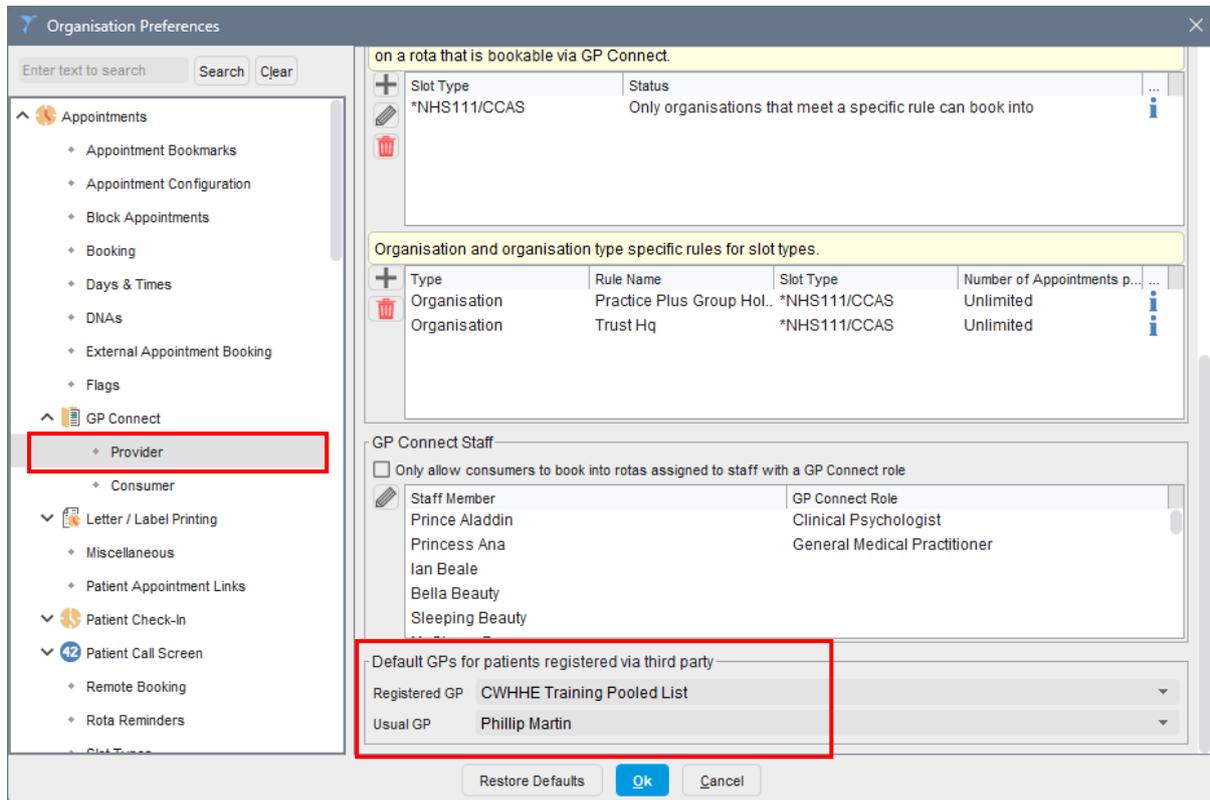
1. Access the Referral Out (as shown in screenshot below) by either:
2. Expand Clinical Policy and select Referral Out
3. Type Referral Out in the search box and click Search
4. Select the Referral Out node from the left-hand side.
5. Select Add User
6. Select Staff you would like to add by highlighting their name
7. Click Ok on the select staff screen
8. Click Ok on the organisation preference screen to save.



NHS 111/GP Connect

If your GP is the main GP in your surgery, you may need to re-adding them in to the Registered GP and the Usual GP areas within the GP Connect Provider.

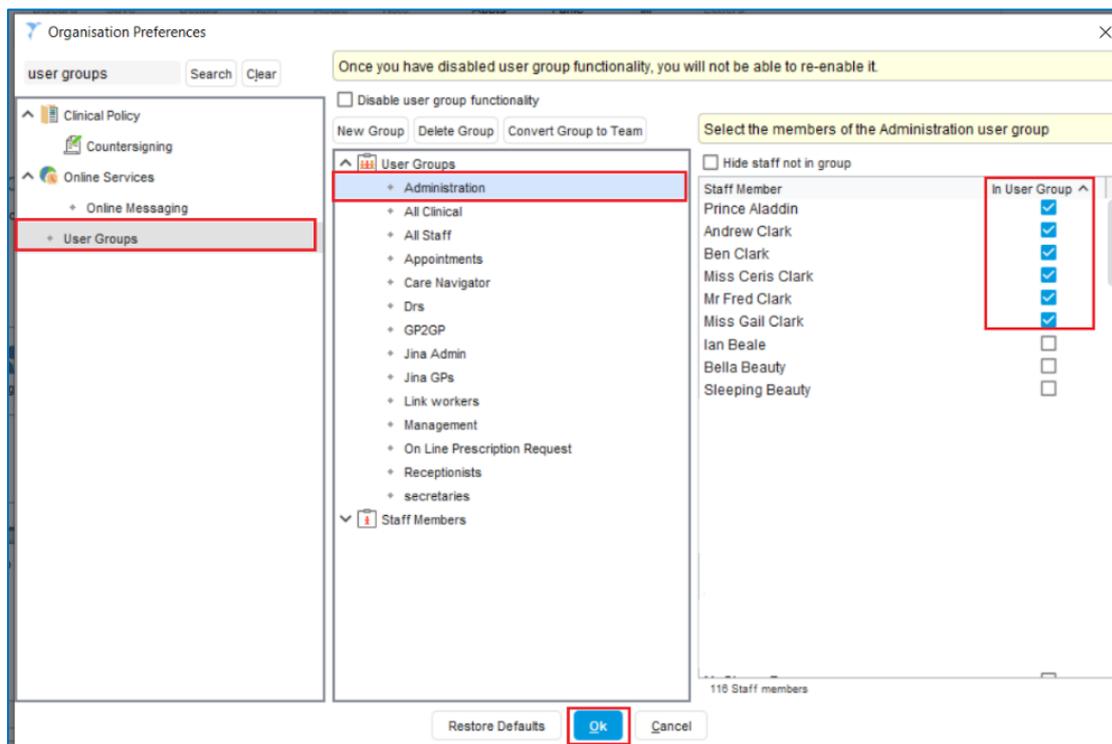
1. You will need to search for “GP Connect” in the search pane or find it under the Appointments folder.



2. Once you have done that, you will need to use the drop down to add the new login to this screen.

User Groups – Adding a user to a group

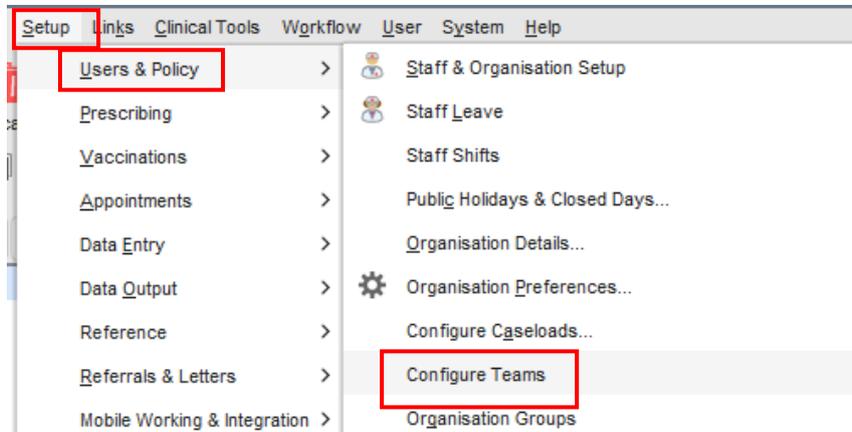
1. Access the User Groups (as shown in screenshot below) by either:
 - a. Locate User Groups
 - b. Type User Groups in the search box and click Search
2. Locate the user group you would like to add users to from the left-hand side
3. Select the tick box next to the staff names to add the user into the user group from the right-hand side.



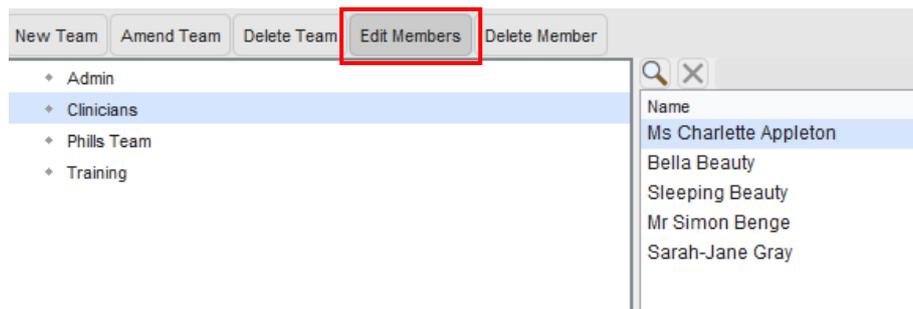
Teams

If you use teams instead of User Groups, you may need to be re-added to the team.

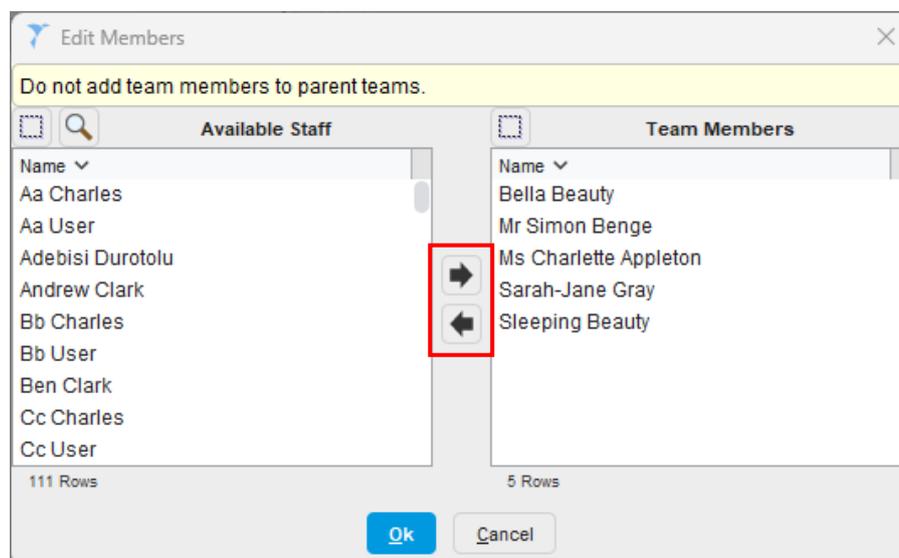
To do this go to Set Up, then Users & Policy and then Configure Teams.



The screen will change, and you will be able to click on the team you want to add the person to and then click on the Edit Members button.



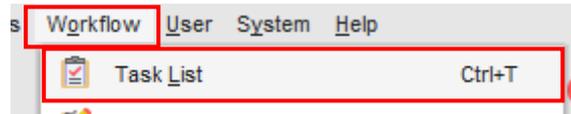
The dialog box will appear, and you simply move the team member from the left to the right using the arrow buttons. Once you have done this, click OK.



Tasks

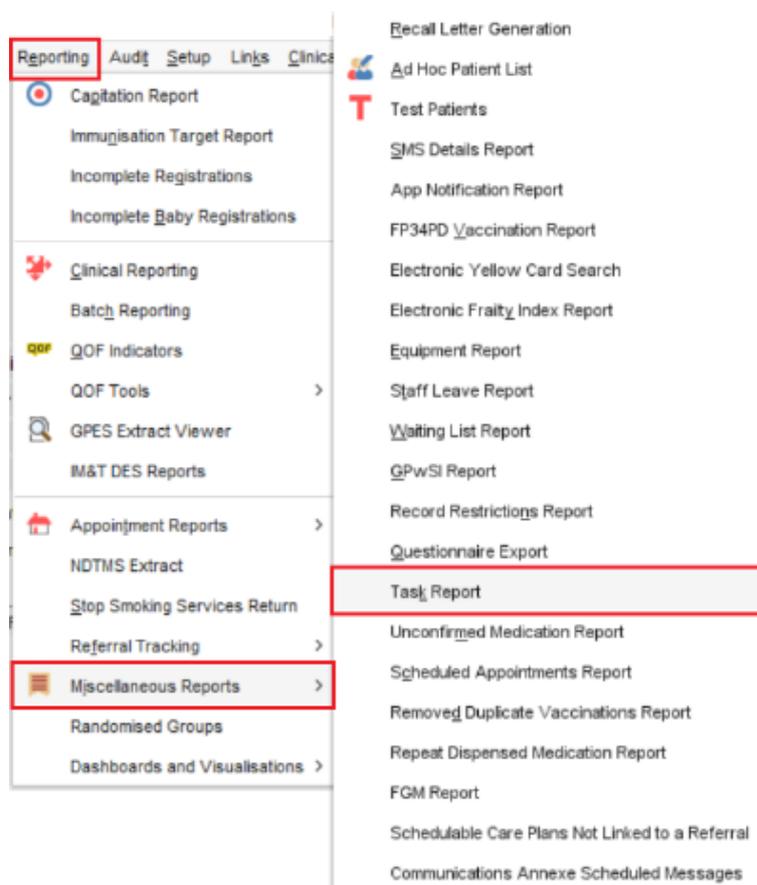
Making sure that they look at all the tasks

1. Navigate to the task Screen, select Workflow> Task List from the main menu.
Please ensure you view all tasks associated with previous profile.



Task Audit for archiving

1. Navigate to the Task Report, select Reporting > Miscellaneous Reports > Task Report
This screen allows you to generate a task report for the archived user.



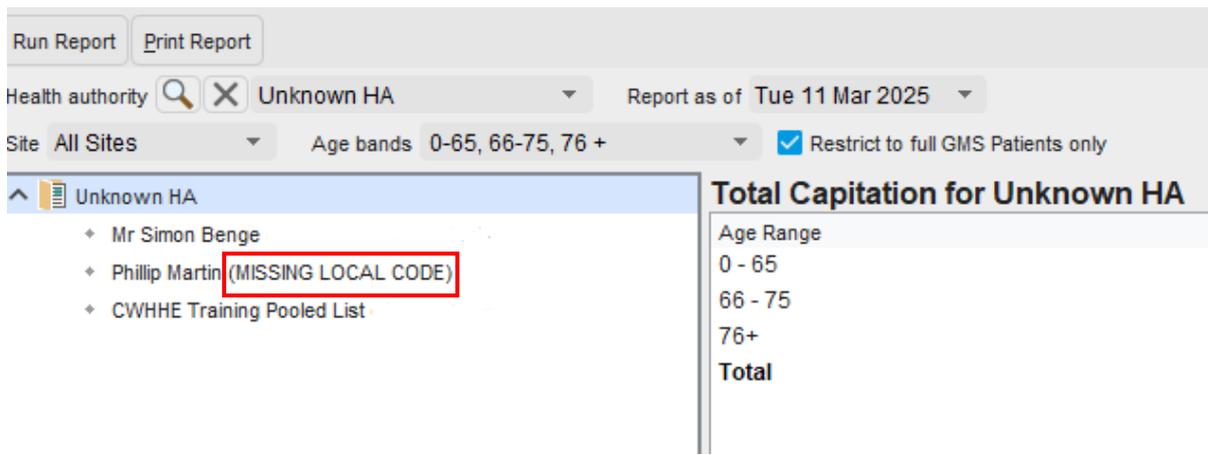
Capitation Lists

You might also need to check that patients are registered to the right person.

1. To do this, go to Reporting on the menu bar and then Capitation Report.

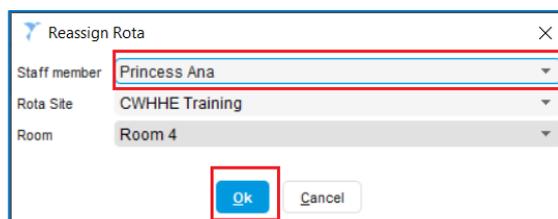


2. The screen will change to show you your capitation, and if there is an issue, it will show like below:

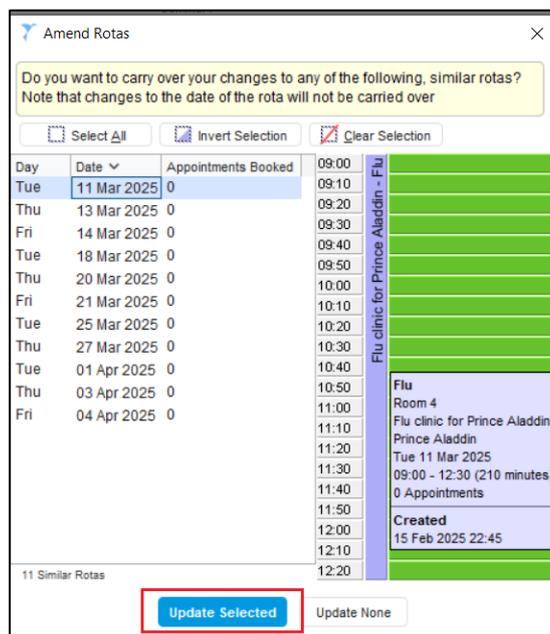


3. If the registered GP has had a new profile you will need to make sure that the local codes have been added to the new user profile.
4. To do this, please read the Local Codes section of this manual.

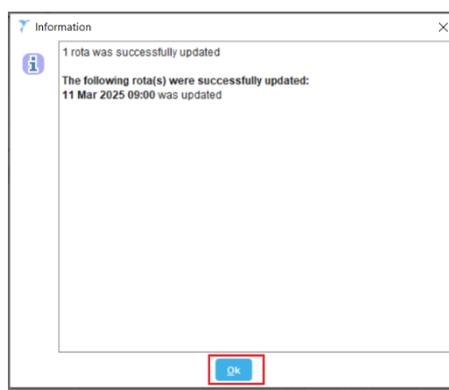
4. Select the staff member from the Staff member drop down to reassign the rota and select Ok. In this example Princess Ana has been selected.



5. You will now have one of the following options:
 - a. One-Off Rota - If this is a one-off rota the rota will be updated to the new staff member.
 - b. More- than one similar rota - If there are similar rotas, an Amend Rotas pop box will appear (as shown below). On this screen you will have an option to select the rotas you would like to update. Select the Rotas and select Update Selected. In the screenshot 1 rota has been highlighted.



6. An information box will appear displaying the rotas that were updated. Click Ok, to close the box.

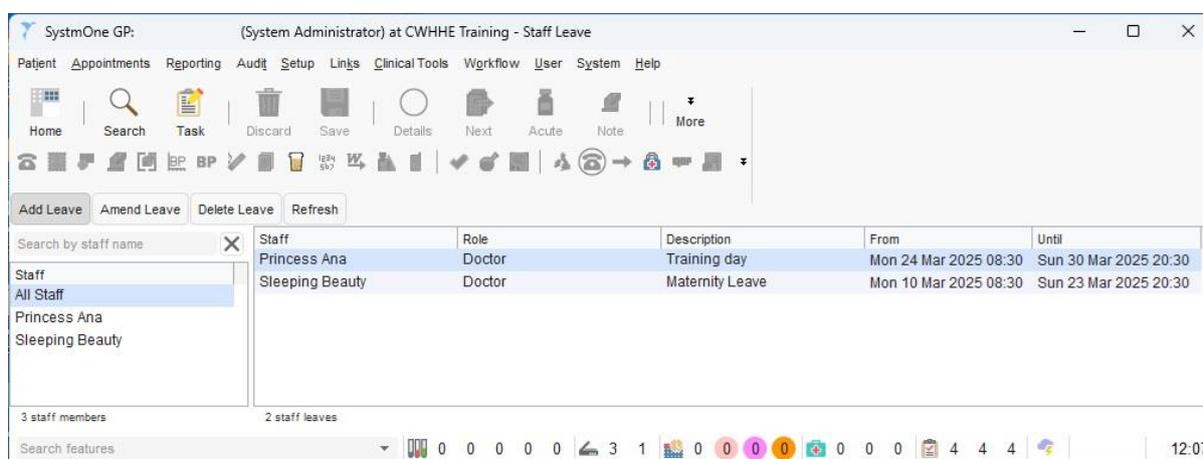


Annual Leave - Using the Staff Leave Screen

1. To view the Staff Leave screen select Setup> Users & Policy> Staff Leave from the Main Menu.



2. The Staff Leave screen allows you to manage leave for members of staff at your organisation:



3. The following options are available on the Staff Leave screen:

| Option | Description |
|---------------------|--|
| Add Leave | Record details of leave for a member of staff |
| Amend Leave | Amend the leave details for the selected entry |
| Delete Leave | Delete the leave details of the selected entry |

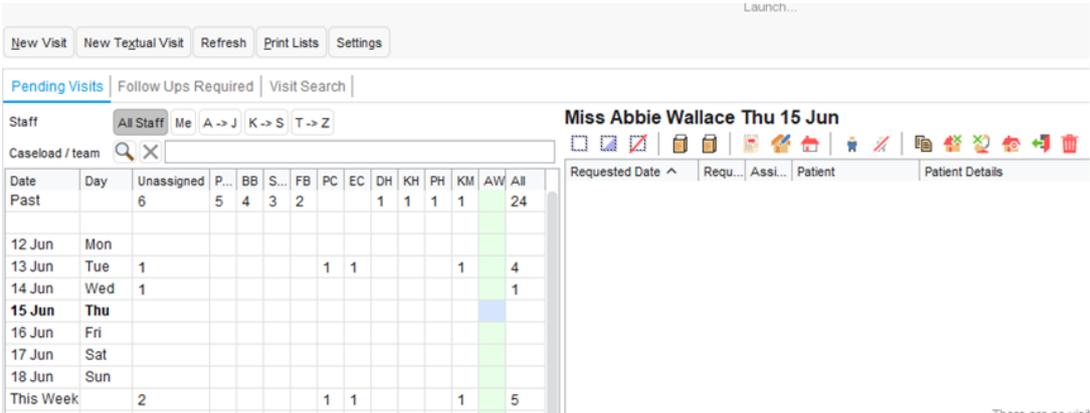
4. Click on Add Leave button select the new profile of the staff member. Record leave using existing leave details from the old profile. Then select old profile of staff member and click on Delete Leave button and click yes to confirm.

Home Visits (if using that screen)

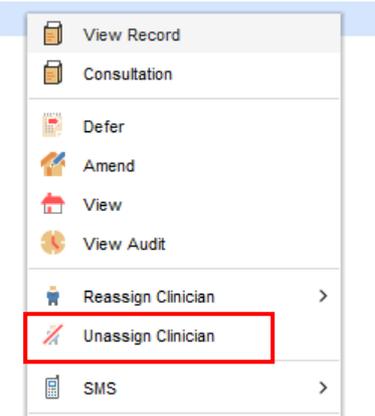
1. To view the Visits screen, select Appointments > Visits from the Main Menu.



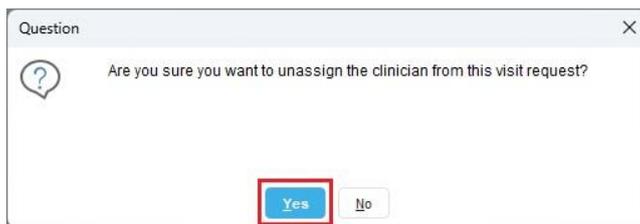
2. The Pending Visits tab of the Visits screen is displayed.



3. Select the pending home visit for the clinician with the old profile then on the right-hand-side of the screen right click to get sub menu and select Unassign Clinician.



4. You will be prompted, click on Yes



- To reassign the new profile again right click on the home visit you just unassigned and choose option Assign Clinician

Pending Visits | Follow Ups Required | Visit Search

Staff: All Staff Me A -> J K -> S T -> Z

Caseload / team

| Date | Day | Unassigned | P... | BB | S... | FB | PC | DH | KH | PH | P... | KM | J... | SW | All |
|---------------|------------|------------|------|----|------|----|----|----|----|----|------|----|------|----------|----------|
| Past | | 22 | 6 | 5 | 3 | 2 | 1 | 1 | 1 | 1 | | 2 | 3 | | 47 |
| 10 Mar | Mon | | | | | | | | | | | | | | |
| 11 Mar | Tue | | | | | | | | | | | | | 1 | 1 |
| 12 Mar | Wed | | | | | | | | | | | | | | |
| 13 Mar | Thu | | | | | | | | | | | | | | |
| 14 Mar | Fri | | | | | | | | | | | | | | |
| 15 Mar | Sat | | | | | | | | | | | | | | |
| 16 Mar | Sun | | | | | | | | | | | | | | |
| This Week | | | | | | | | | | | | | | 1 | 1 |
| 17 Mar | Mon | | | | | | | | | | | | | | |
| 18 Mar | Tue | | | | | | | | | | | | | | |
| 19 Mar | Wed | | | | | | | | | | | | | | |
| 20 Mar | Thu | | | | | | | | | | | | | | |
| 21 Mar | Fri | | | | | | | | | | | | | | |

Snow White Tue 11 Mar

Requested Date: 11 Mar 2025 12:16

Requ...: SW

Assi...: Miss Jane Ande

Patient: Miss Jane Ande

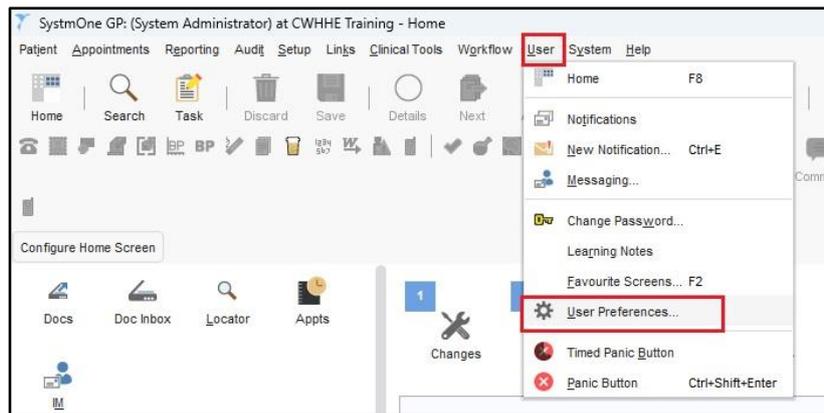
- View Record
- Consultation
- Defer
- Amend
- View
- View Audit
- Reassign Clinician >**
- Unassign Clinician
- SMS >

User Preferences

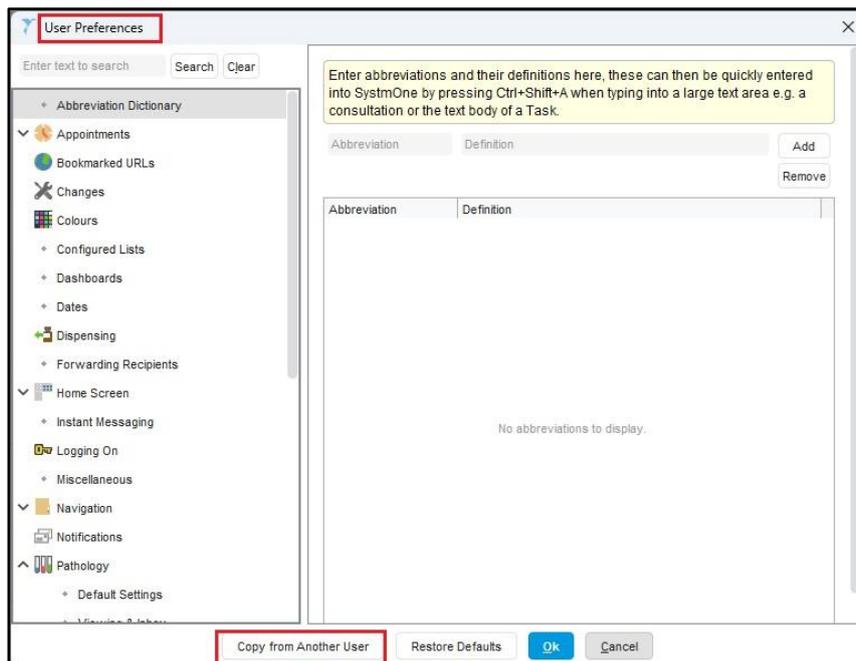
To copy from another user

If the other profile is still active, you may be able to copy the user preferences from the old profile to the new.

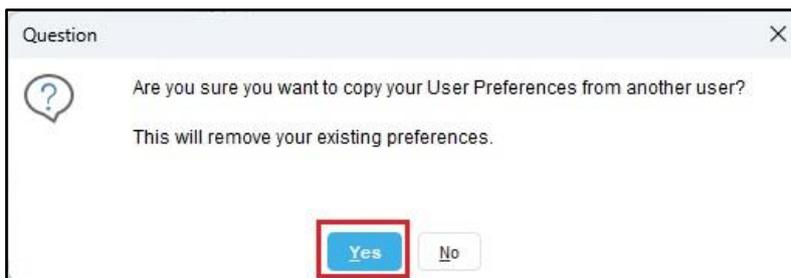
1. On the top Menu on SystemOne Navigate to User > User Preferences



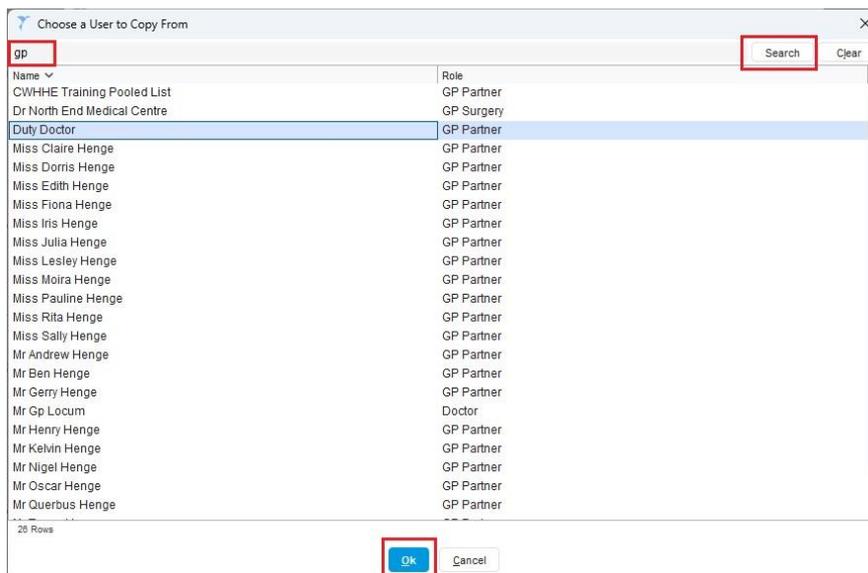
2. Press the 'Copy from Another User' button



3. You will get a prompt click on Yes



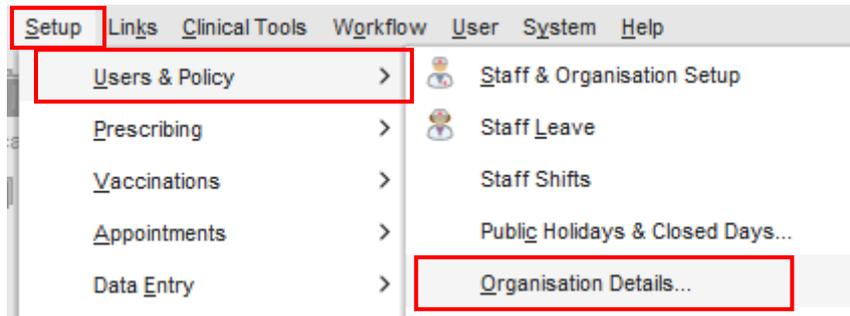
4. Search for your old profile and select it. Click on **Ok**



Other Items

Senior Staff Member / Privacy Officer (if they were before)

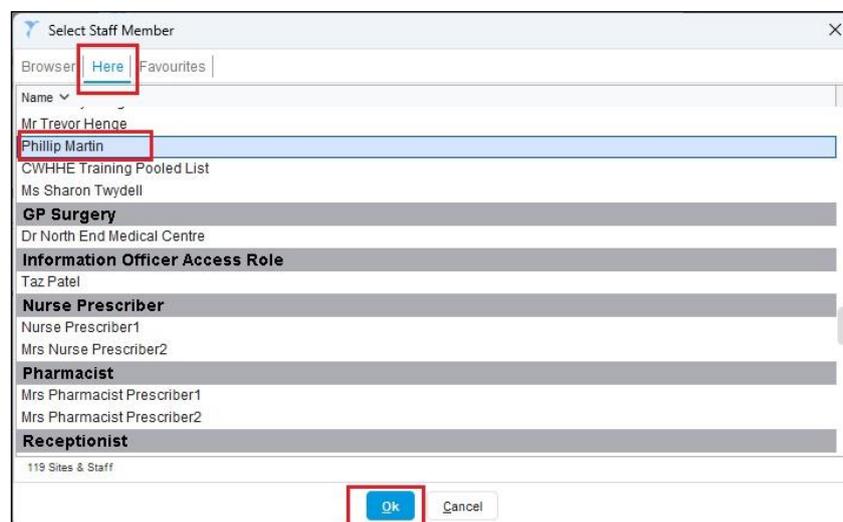
1. On the top Menu on SystemOne Navigate to Setup > Users & Policy > Organisational Details.



2. Choose which entry you need to change, and click on the magnifying glass icon to search for the user



3. The staff member popup box opens. Click on the Here tab and search for the user. Once you have selected the user click on OK, and then OK again, to save the entry.



SMS Presets

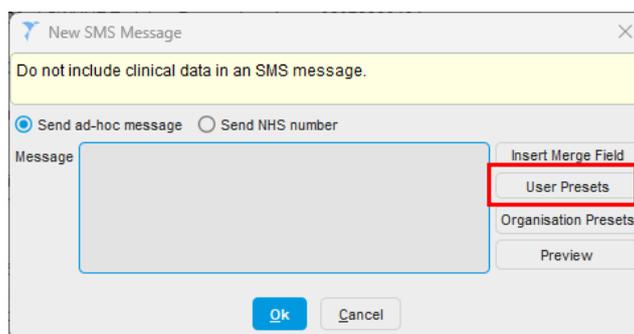
You may find that your SMS presets may be missing. This might return when you copy your User Preferences from the last log in. This may work, however, you may need to rewrite them all up.

Re-write

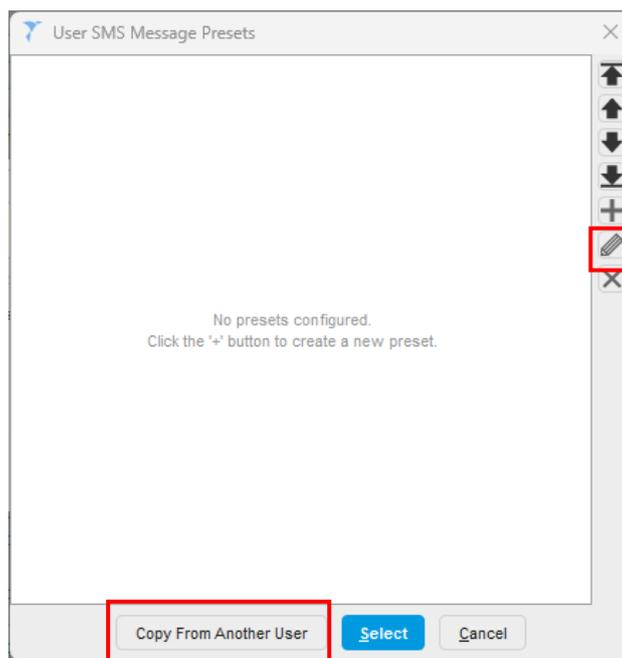
Find the SMS Messages node on your tree. The right hand side pane will change and show the SMS Messages page. On the top of this, there are for icons. You need to click on the SMS button.



Which will bring up the New SMS Message, however, you will need to click on the User Presets button.



From the next book, you can either copy the sms's from another person or to-write new ones, click on the plus icon



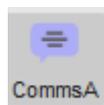
Communication Annex

You may want to think about moving from the previous SMS way, and putting your SMS presents into your surgeries communication annex.

The Communications Annexe is a single tool allowing you to communicate with patients through available and preferred communication channels – SMS messaging, email and Airmid. You can also get replies, attach SNOMED codes and send SystemOne Questionnaires to your text messages.

Installation

You will need to add the communication annex icon to your tool bar, before you can use it.



Training

The North West London Clinical Systems Training Team run training courses on how you can use this and a manual which is embedded in this document.

Training Courses

If you would like training, please go to the NWL Learning Hub and use the search box to look for SystemOne Communication Annex or go to <https://www.nwllearning.nhs.uk/enrol/index.php?id=363>

Manual

The NHS NWL below will support you in using the Communication Annex. To open this, double click on the icon below.

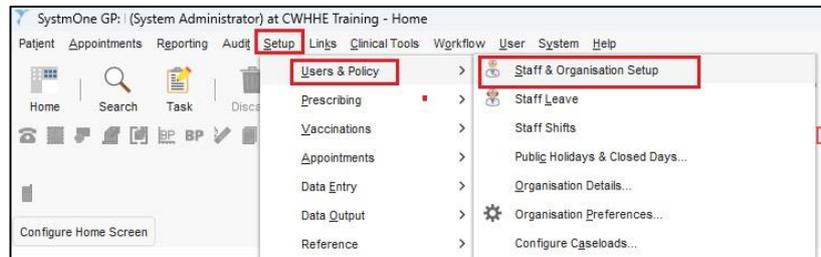


Communication
Annex.pdf

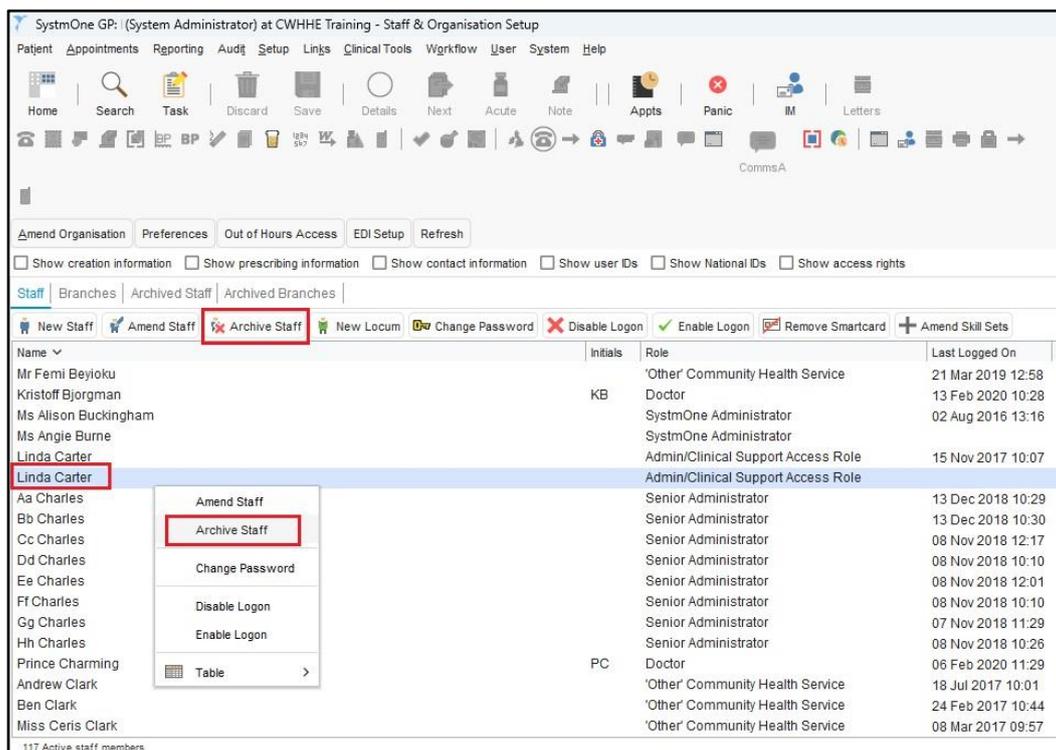
Re-archiving the user

Once you have completed all the above steps then you can archive the old user's profile.

1. On the top Menu on SystemOne Navigate to Setup > Users & Policy > Staff & Organisation Setup



2. Select the staff profile to Archive then click on button Archive staff or right click to get sub menu Archive staff



3. User will be prompted, click on **Yes**.

