



SystmOne 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 cia the Self-Serve Portal: <u>Click</u> <u>Here</u>

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

SystmOne User Accounts

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 and the existing profile will have been Archived (moved to the Archived Staff tab of the Staff & Organisation Setup screen)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

	Setup Links Clinical Tools	Workflow User System Help	
1	Users & Policy	> 😤 Staff & Organisation Setup	
10	<u>P</u> rescribing	> 😤 Staff Leave	
n	Vaccinations	> Staff Shifts	E.
1	Appointments	> Public Holidays & Closed Days	

- 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.



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

🍸 Amend Staff Details				
Global Settings Local Setting	s Local Access Rights	Skill Sets Additi	ional Languages	Additional Details
Employment Details				
*Employment role	Systems Supp	ort Access Role		-
Telephone no. / ext.				
Pager number				
Employment start date	21 Oct 2016 🔻			
GP local codes			Edit Local Code	s
PPA ID			Caseload Prescri	bing
Using PPA ID			Set Clea	r
Using GMC Number			Set Clea	r
Preferred appointment duration	10 🗘 Minutes			
Start/end location	÷ (#			
Activation				
Logon at this organisation is	enabled			
Automatically disable this log	gon if not used for 56	hours (this number	can be changed vi	a preferences)
This logon will not be disabl	ed automatically		Reset Timer	

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.

Amend Staff Details				
Global Settings Local Setting	g <mark>s L</mark> ocal Access Rights Skill Sets .	Additional La	anguages Addi	tional Det
Employment Details				
*Employment role	Q X GP Partner		*	
GP Connect role			*	i –
Telephone no. / ext.				
Pager number				
Employment start date	04 May 2016 🔻			
GP local codes	BD 253, ZZ3 121, LNB 313, Q32 11	Edit	Local Codes	
*PPA ID	512124	Casel	oad Prescribing	
Using PPA ID		Set	Clear	
Using GMC Number		Set	Clear	
Preferred appointment duration	10 Minutes			
Start/end location				
A - R R				

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.

GP Local Code S	etup			×
Health authority	🔍 🗙 Bedfordshire (BD)	٣	Code	253
Health authority	🔍 🗙 Training Ha (ZZ3)	*	Code	121
Health authority	\bigcirc X Redbridge and Waltham Forest (LNB)	*	Code	313
Health authority	\bigcirc X Yorkshire and the Humber SHA (Q32)	*	Code	11
		Ado	H	<u>R</u> emove
	<u>Q</u> k <u>C</u> ancel			

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

Organisation Preferences

 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.

7 Organisation Preferences		\times
Enter text to search		
∧ 🔅 Appointments	Select a specific page of settings to configure from the tree on the left	
 Appointment Bookmarks 		
* Appointment Configuration		
* Block Appointments		
* Booking		
 Days & Times 		
* DNAs		
* External Appointment Booking		
* Flags		
A 📳 GP Connect		
 Provider 		
 Consumer 		
✓ S Letter / Label Printing		
* Miscellaneous		
* Patient Appointment Links		
✓ 4 Patient Check-In		
✓		
* Remote Booking		
 Rota Reminders 		
- Chittees		
	Restore Defaults <u>Qk</u> <u>C</u> ancel	



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.

Enter text to accord	Referring Staff		
Enter text to search Search Clear	Add User Remove User		
 Privacy Officers Problems QOF Referrals In Referrals Out Reminders Sharing Tabbed Journal Tree Colours 	Staff Member ✓ Duty Doctor Nurse Prescriber1 Mrs Receptionist Reception	Role GP Partner Nurse Prescriber Receptionist	
Citri Tree Shortcuts	3 Referring staff General Senet tasks when electronic referrals Receive tasks when electronic referrals Send tasks for unacknowledged referra Generate task if referral is unacknowledged	are accepted (doesn't apply to Communication Wizard) are ended Is for weeks	
+ Device Approval Stock Control DoLS	Enter URL (excluding the protocol - i.	e. www.url.co.uk and not http://www.url.co.uk)	Te

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.

		on a rota that is bookable	via GP Connect.		
iter text to search	Search Clear	+ Slot Type	Status		
Appointments		*NHS111/CCAS	Only organisations t	that meet a specific rule	e can book into
+ Appointment I	Bookmarks				
+ Appointment (Configuration				
 Block Appoint 	tments				
 Booking 		Organisation and organis	ation type specific rules for slo	t types.	
 Days & Times 		+ Туре	Rule Name	Slot Type	Number of Appointments p
+ DNAs		Organisation	Practice Plus Group Hol.	*NHS111/CCAS	Unlimited
. 5.4		Organisation	I rust Hq	*NHS111/CCAS	Unlimited
 External Appo 	Dintment Booking				
+ Flags					
 Flags GP Connect 					
 Flags GP Connect Provider 		GP Connect Staff			
 Flags GP Connect Provider Consume 	r	GP Connect Staff	book into rotas assigned to staff w	vith a GP Connect role	
 Flags GP Connect Provider Consume 	r	GP Connect Staff Only allow consumers to I Staff Member Staff Member	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role	
 Flags GP Connect Provider Consumer Consumer Letter / Label 	r Printing	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role Clinical Psychologis	st
 Flags GP Connect Provider Consume Consume Letter / Label Miscellaneous 	r Printing S	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin Princess Ana Ion Boalo	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner
 Flags GP Connect Provider Consume Consume Letter / Label Miscellaneous Patient Appoint 	r Printing s ntment Links	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin Princess Ana Ian Beale Bella Reauty	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner
 Flags GP Connect Provider Consumer GR Letter / Label Miscellaneous Patient Appoin S Patient Check 	r Printing s ntment Links -In	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin Princess Ana Ian Beale Bella Beauty Sleeping Beauty	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner
 Flags GP Connect Provider Consume Consume Consume Exter / Label Miscellaneous Patient Appoin Seatent Check Patient Class of Patient Cla	r Printing s ntment Links -In creen	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin Princes Ana Ian Beale Bella Beauty Sleeping Beauty Sleeping Beauty	book into rotas assigned to staff w	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner
 Flags GP Connect Provider Consume Consume Consume Miscellaneous Patient Appoin Patient Check Patient Check Remote Booki 	r Printing s ntment Links -In creen ing	GP Connect Staff Only allow consumers to I Staff Member Prince Aladdin Princes Ana Ian Beale Bella Beauty Sleeping Beauty Sleeping Beauty - Default GPs for patients re Registered GP CWHHE Tr	book into rotas assigned to staff w gistered via third party raining Pooled List	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner
 Flags Flags GP Connect Provider Consume Consume Consume Miscellaneous Patient Appoin Patient Check Patient Call So Remote Booki Rota Reminde 	r Printing s ntment Links -In creen ing	GP Connect Staff Only allow consumers to I Staff Member Princes Ana Ian Beale Bella Beauty Sleeping Beauty Constants re Registered GP CWHHE Tr Usual GP Phillip Mart	book into rotas assigned to staff w gistered via third party raining Pooled List	vith a GP Connect role GP Connect Role Clinical Psychologis General Medical Pra	st actitioner

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.

Y Organisation Preferences		Letter a	×
user groups Search Clear	Once you have disabled user group functionality, yo	u will not be able to re-enable it.	
 Clinical Policy Countersigning Online Services Online Messaging User Groups 	Disable user group functionality New Group Delete Group Convert Group to Team Administration All Clinical All Staff Appointments Care Navigator Drs GP2GP Jina Admin Jina GPs Link workers Management On Line Prescription Request Receptionists Secretaries Staff Members	Select the members of the Administration Hide staff not in group Staff Member Prince Aladdin Andrew Clark Ben Clark Miss Ceris Clark Miss Ceris Clark Miss Gail Clark Ian Beale Bella Beauty Sleeping Beauty	user group
		118 Staff members	
	Restore Defaults	ncel	



Teams

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

	<u>S</u> etu	p	l in <u>k</u> s	Clinical Tools	W <u>o</u> rkf	low	<u>U</u> se	r S <u>y</u> stem	<u>H</u> elp	
Ì		U	sers &	Policy	>	8	5	Staff & Orga	nisation	Setup
X		P	rescrib	bing	>	2	3 9	Staff <u>L</u> eave		
1		V	<u>/accina</u>	ations	>		5	Staff Shifts		
		A	ppoint	ments	>		F	Publi <u>c</u> Holida	ys & Clo	sed Days
l		۵)ata <u>E</u> ni	try	>		Q	Organisation	Details.	
		۵)ata <u>O</u> u	itput	>	☆	F	Organisation	Prefere	nces
		F	leferen	ice	>		0	Configure C <u>a</u>	seloads	
		F	eferra	ls & Letters	>		0	Configure Te	ams	
		N	lobile V	Vorking & Integra	ation >		(Dr <u>q</u> anisation	Groups	

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.

New Team Amend Team Delete Team Edit Members Delete Member	
* Admin	QX
* Clinicians	Name
 Phills Team 	Ms Charlette Appleton
* Training	Bella Beauty
	Sleeping Beauty
	Mr Simon Benge
	Sarah-Jane Gray

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

🝸 Edit Members				×
Do not add team r	nembers to parent tea	ms.		
	Available Staff		Team Members	
Name 🗸			Name 🗸	
Aa Charles			Bella Beauty	
Aa User			Mr Simon Benge	
Adebisi Durotolu			Ms Charlette Appleton	
Andrew Clark			Sarah-Jane Gray	
Bb Charles		-	Sleeping Beauty	
Bb User		Ċ		
Ben Clark				
Cc Charles				
Cc User				
111 Rows			5 Rows	
		<u>0</u> k <u>C</u>	ancel	

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.

				Recall Letter Generation
R <u>e</u> por	rting Audi <u>t S</u> etup Lin <u>k</u> s <u>C</u> l	inica	*	Ad Hoc Patient List
0	Cagitation Report		т	Test Patients
	Immunisation Target Report			SMS Details Report
	Incomplete Registrations			App Notification Report
	Incomplete Baby Registrations			FP34PD ⊻accination Report
*	Clinical Reporting			Electronic Yellow Card Search
	Batch Reporting			Electronic Fraity Index Report
QOF	QOF Indicators			Equipment Report
	QOF Tools	>		Staff Leave Report
2	GPES Extract Viewer			Waiting List Report
	M&T DES Reports			<u>G</u> PwSI Report
-	Appointment Reports	,		Record Restrictions Report
	NDTMS Extract	Ĺ		Questionnaire Export
	Stop Smoking Services Return			Tas <u>k</u> Report
	Referral Tracking	,		Unconfirmed Medication Report
=	Miscellaneous Reports	>		Scheduled Appointments Report
1.4	Randomised Groups			Removed Duplicate Vaccinations Report
	Dashboards and Visualisations	,		Repeat Dispensed Medication Report
		-		FGM Report
				Schedulable Care Plans Not Linked to a Referral
				Communications Annexe Scheduled Messages

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.

<u>Appointments</u>	Reporting	Audi <u>t</u>	<u>S</u> etup	Lin <u>k</u> s	Clinical To
	💿 Ca <u>p</u>	itation R	leport		6
	Imm	uninatio	n Taraat	Doport	P

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.



Rotas

Moving rotas to new user

1. Select Appointments > Rotas



- 2. Select the staff member, in my example I have selected Prince Aladdin from the drop down.
- 3. Highlight the rota as shown below and right click and select Administration > Change Staff



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.

🍸 Reassign	Rota	×
Staff member	Princess Ana	*
Rota Site	CWHHE Training	*
Room	Room 4	-
	Qk <u>C</u> ancel	

- 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 <u>similar</u> 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.

🍸 Ame	end Rotas				×									
Do you Note tha	Do you want to carry over your changes to any of the following, similar rotas? Note that changes to the date of the rota will not be carried over													
	Select <u>A</u> ll	Invert Selection	Z Cle	ar Se	election									
Tue Thu Fri Tue Thu Fri Tue Thu	11 Mar 2025 13 Mar 2025 14 Mar 2025 14 Mar 2025 18 Mar 2025 20 Mar 2025 21 Mar 2025 25 Mar 2025 27 Mar 2025 27 Mar 2025	Appointments Booked 0 0 0 0 0 0 0 0 0 0	09:10 09:20 09:30 09:40 09:50 10:00 10:10 10:20 10:30	Flu clinic for Prince Aladdin - Fl										
Tue Thu Fri	01 Apr 2025 03 Apr 2025 04 Apr 2025	0 0 0	10:40 10:50 11:00 11:10 11:20 11:30 11:40 11:50 12:00 12:10		Flu Room 4 Flu Clinic for Prince Aladdin Prince Aladdin Tue 11 Mar 2025 09:00 - 12:30 (210 minutes) 0 Appointments Created 15 Feb 2025 22:45									
11 Similar	Rotas	Update Selected	12:20 Update	None										

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

🍸 Info	rmation	×
đ	1 rota was successfully updated	
	11 Mar 2025 09:00 was updated	
	QK	

Annual Leave - Using the Staff Leave Screen

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

🍸 Syst	mOne GP:		(System	Administrator) at CWHH	E Training - S	taff Leave	
Patjent	<u>Appointments</u>	Reporting	Audi <u>t</u>	Setup Links Clinical Tool	s W <u>o</u> rkflow	<u>U</u> ser S <u>y</u> stem <u>H</u> elp	
Home	Search	Task	Disca	Users & Policy Prescribing	> 2	Staff & Organisation Setup Staff Leave	3
8	M	BP BP	2	Vaccinations	>	Staff Shifts	r:
				Appointments	>	Public Holidays & Closed Days	

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

🍸 SystmOne GP: (1	System Administrator) at CWHHE	Training - Staff Leave			– 🗆 X
Patjent Appointments Reporting A	udi <u>t S</u> etup Lin <u>k</u> s <u>C</u> linical Tools	Workflow User System Help			
Home Search Task	Discard Save Details	Next Acute Note	¥ More		
Add Leave Amend Leave Delete Le	eave Refresh	✓ < <p>III A (3) →</p>) an 11 -		
Search by staff name	Staff	Role	Description	From	Until
2hr#	Princess Ana	Doctor	Training day	Mon 24 Mar 2025 08:30	Sun 30 Mar 2025 20:30
All Staff	Sleeping Beauty	Doctor	Maternity Leave	Mon 10 Mar 2025 08:30	Sun 23 Mar 2025 20:30
Princess Ana					
Sleeping Beauty					
3 staff members	2 staff leaves				
Search features	✓ 000 0	0 0 0 0 🚄 3 1	📫 0 🕕 🛈 🚺 0	0 0 😭 4 4 4	🤹 12:07

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.

<u>N</u> ew Visit	New Te	xtual Visit F	Refre	sh	Print	t Lists	3	Settin	gs																				
Pending \	/isits F	ollow Ups R	equi	red	Vis	sit Se	arch	h																					
Staff	A	Staff Me	A -> .	JK	-> S	T->	z									I	Miss Abbie Wa	all	ace Thu '	15 Ju	n								
Caseload /	team 🔾	X					_									١.			🗊 🖹 🔮	1	Ŕ	Ż	[]	ľ)	4	<u>2</u>	P	÷	Ŵ
Date	Day	Unassigned	P	BB	S	FB	PC	EC	DH	КН	PH	KM	AW	AI	T	1	Requested Date A	1	Requ Assi	. Patier	nt			Pa	tient D	etail	5		
Past		6	5	4	3	2			1	1	1	1		24															
12 Jun	Mon																												
13 Jun	Tue	1					1	1				1		4															
14 Jun	Wed	1												1															
15 Jun	Thu																												
16 Jun	Fri																												
17 Jun	Sat																												
18 Jun	Sun																												
This Wee	k	2					1	1				1		5															

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

Question		×
?	Are you sure you want to unassign the clinician from this visit request?	

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

Pending V	isits F	ollow Ups Re	equi	red	Vis	sit S	earc	:h								
Staff	A	ul Staff Me 🖌	۹->	JK	-> S	Т-	> Z									Snow White Tue 11 Mar
Caseload / t	eam C	XX														
Date	Day	Unassigned	P	BB	S	FB	PC	DH	КН	PH	P	KM	J	SV	V AII	Requested Date V Requ Assi Patient
Past		22	6	5	3	2	1	1	1	1		2	3		47	11 Mar 2025 12:16 SW Miss Jane Ande
10 Mar	Mon															View Record
11 Mar	Tue													1	1	Consultation
12 Mar	Wed															
13 Mar	Thu															Defer
14 Mar	Fri															Amend
15 Mar	Sat															
16 Mar	Sun															T View
This Week														1	1	🔅 View Audit
17 Mar	Mon															🛉 Reassign Clinician >
18 Mar	Tue															/ Unassion Clinician
19 Mar	Wed															
20 Mar	Thu															🖩 sms 🛛 🗡
21 Mar	Fri															

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 SystmOne Navigate to User > User Preferences



2. Press the 'Copy from Another User' button

Abbreviation Dictionary	Enter abbreviatio into SystmOne b consultation or th	ns and their definitions here, these can then y pressing Ctrl+Shift+A when typing into a lar ne text body of a Task.	be quickly entered ge text area e.g. a
Appointments	Abbreviation	Definition	Add
Bookmarked URLs			Remove
Colours	Abbreviation	Definition	
Configured Lists			
 Dashboards 			
* Dates			
📲 Dispensing			
+ Forwarding Recipients			
Home Screen			
 Instant Messaging 		No abbreviations to display.	
🕼 Logging On			
* Miscellaneous			
Navigation			
Navigation			
 Navigation Notifications Pathology 			

3. You will get a prompt click on Yes



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

gp		Search	Clear
Name 🗸	Role		
CWHHE Training Pooled List	GP Partner		
Dr North End Medical Centre	GP Surgery		
Duty Doctor	GP Partner		
Miss Claire Henge	GP Partner		
Miss Dorris Henge	GP Partner		
Miss Edith Henge	GP Partner		
Miss Fiona Henge	GP Partner		
Miss Iris Henge	GP Partner		
Miss Julia Henge	GP Partner		
Miss Lesley Henge	GP Partner		
Miss Moira Henge	GP Partner		
Miss Pauline Henge	GP Partner		
Miss Rita Henge	GP Partner		
Miss Sally Henge	GP Partner		
Mr Andrew Henge	GP Partner		
Mr Ben Henge	GP Partner		
Mr Gerry Henge	GP Partner		
Mr Gp Locum	Doctor		
Mr Henry Henge	GP Partner		
Mr Kelvin Henge	GP Partner		
Mr Nigel Henge	GP Partner		
Mr Oscar Henge	GP Partner		
Mr Querbus Henge	GP Partner		
28 Rows			

Other Items

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

 On the top Menu on SystmOne 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

7 Amend CWHHE Train	ing
Details Technical Se	tup Spine
Parent trust	Kestminster Pct
Parent CCG/LAT	🔍 🗙 NHS Central London (Westminster) CCG
Senior staff member	QX
Privacy officer	🔍 🗙 Phillip Martin
Organisation type	General Practice
🗹 Allow Trust Reporting	Never share data
	Skip IOS Claims

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.

	×
Browser Here Favourites	
Name ~	
Mr Trevor Henge	
Phillip Martin	
CWHHE Training Pooled List	
Ms Sharon Twydell	
GP Surgery	
Dr North End Medical Centre	
Information Officer Access Role	
Taz Patel	
Nurse Prescriber	
Nurse Prescriber1	
Mrs Nurse Prescriber2	
Pharmacist	
Mrs Pharmacist Prescriber1	
Mrs Pharmacist Prescriber2	
Receptionist	
119 Sites & Staff	16 ⁻²⁴
<u>Ok</u> <u>Cancel</u>	

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.

New SMS Message	×
Do not include clinical data in an SMS message.	
Send ad-hoc message Send NHS number	
Message	Insert Merge Field
	User Presets
	Organisation Presets
	Preview
Qk <u>C</u> ancel	

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 SystmOne 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 witch 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 SystmOne 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.



Re-archiving the user

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

 On the top Menu on SystmOne 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

🍸 SystmOne GP: I (System Administrator) at CWHHE Training - Staff & Organisation Setup			
Patjent Appointments Reporting Audit Setup Links Clinical Tools Workflow User System	n <u>H</u> elp		
Home Search Task Discard Save Details Next Acute No	• 	🍄 🕺 🚅 🗮 Appts Panic M Letters	
C ■ F I II E P V I I S S K A I V J II A (3)	→ 🎧 🚥	CommsA	≱≣●≙→
Amend Organisation Preferences Out of Hours Access EDI Setup Refresh			
Show creation information Show prescribing information Show contact information	how user IDs	Show National IDs Show access right	ts
Chaff Dranchas Archived Chaff Archived Pronchas			San i
Stall Branches Alchived Stall Alchived Branches			
🛉 New Staff 🦸 Amend Staff 🙀 Archive Staff 🕴 New Locum 📴 Change Password 🗙	Disable Logo	on 🧹 Enable Logon 🔎 Remove Smartcard	Amend Skill Sets
Name V	Initials	Role	Last Logged On C
Mr Femi Beyioku		'Other' Community Health Service	21 Mar 2019 12:58
Kristoff Bjorgman	KB	Doctor	13 Feb 2020 10:28
Ms Alison Buckingham		SystmOne Administrator	02 Aug 2016 13:16
Ms Angie Burne		SystmOne Administrator	
Linda Carter		Admin/Clinical Support Access Role	15 Nov 2017 10:07
Linda Carter		Admin/Clinical Support Access Role	
Aa Charles Amend Staff		Senior Administrator	13 Dec 2018 10:29
Bb Charles		Senior Administrator	13 Dec 2018 10:30
Cc Charles		Senior Administrator	08 Nov 2018 12:17
Dd Charles Change Password		Senior Administrator	08 Nov 2018 10:10
Ee Charles		Senior Administrator	08 Nov 2018 12:01
Ff Charles Disable Logon		Senior Administrator	08 Nov 2018 10:10
Gg Charles		Senior Administrator	07 Nov 2018 11:29
Hh Charles Enable Logon		Senior Administrator	08 Nov 2018 10:26
Prince Charming	PC	Doctor	06 Feb 2020 11:29
Andrew Clark		'Other' Community Health Service	18 Jul 2017 10:01
Ben Clark		'Other' Community Health Service	24 Feb 2017 10:44
Miss Ceris Clark		'Other' Community Health Service	08 Mar 2017 09:57
117 Active staff members			

3. User will be prompted, click on Yes.

