



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

EMIS Web Creating a New User



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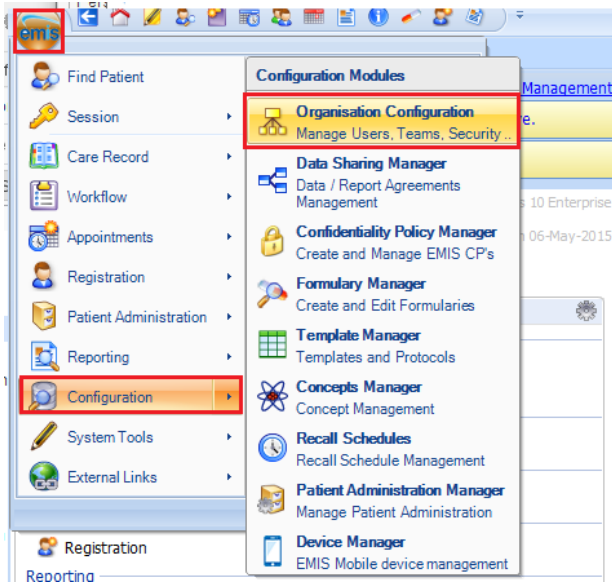
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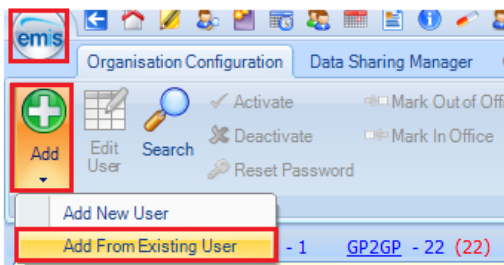
Creating a New User Account

1. Click **EMIS Menu – Configuration – Organisation Configuration**

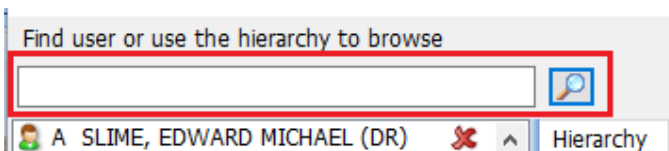


2. Click **Add** and select from the following:

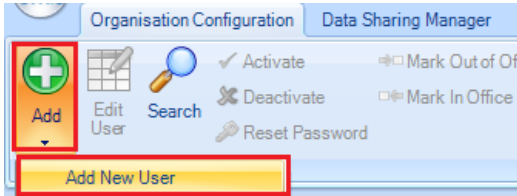
a. **Add From Existing User (if the user is an existing EMIS user)**



Type in the **staff member name** and click the **magnify icon**. Select the required staff member



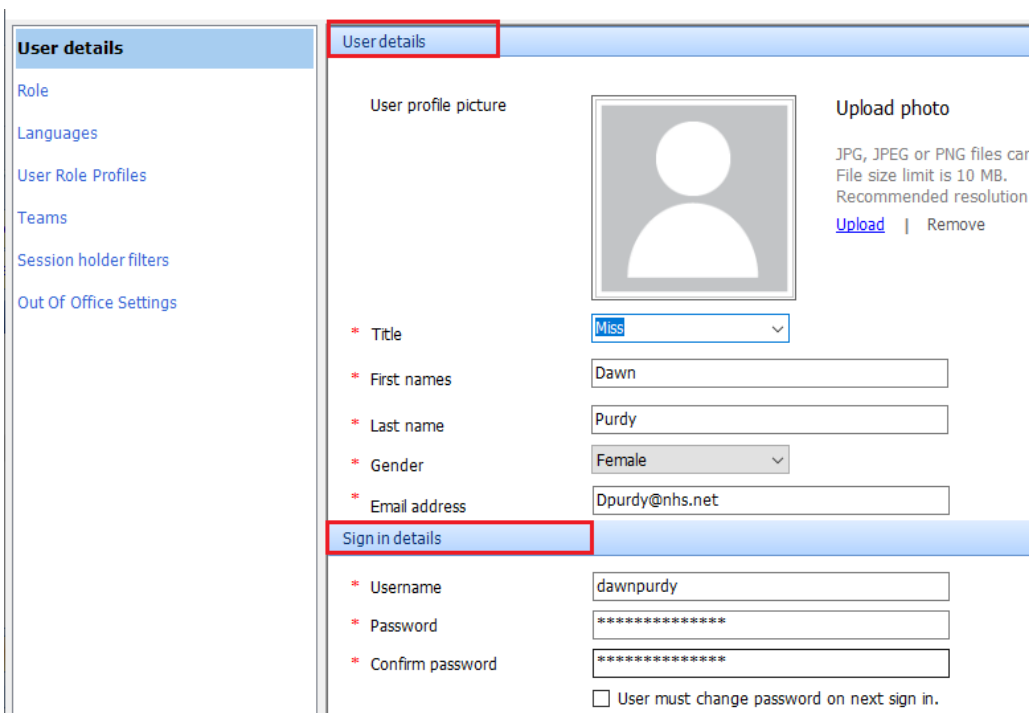
b. Add New User



3. The **Edit User** dialogue will display, review this screen to see if this is an existing user or complete each section as follows:

a. User Details:

Complete title, first name, last name, gender and email address.
Complete the **sign in details**: username and password



b. Role (role access details):

Job Category	Select an appropriate job category
Appointment Session Holder	Click Yes if the staff member will see patients
Patient Facing Service Booking	If the above is Yes can any patient book appointment's via patient facing services or just their own registered patients
Consulter	Click Yes or No
User Mnemonic	Select the user initials if possible (these will show in EMIS audit trails)



Authorise Prescriptions	Select Independent Prescribing or None (depending on the job category)
Permit Medication warning /alerts	This will be automatically set depending on the job category
Stamp User Choice	Select which GP details will display when prescribing (if this is not a regular clinician select a GP to use as the stamp)
Formulary	Select the relevant practice formulary or leave as the EMIS Standard

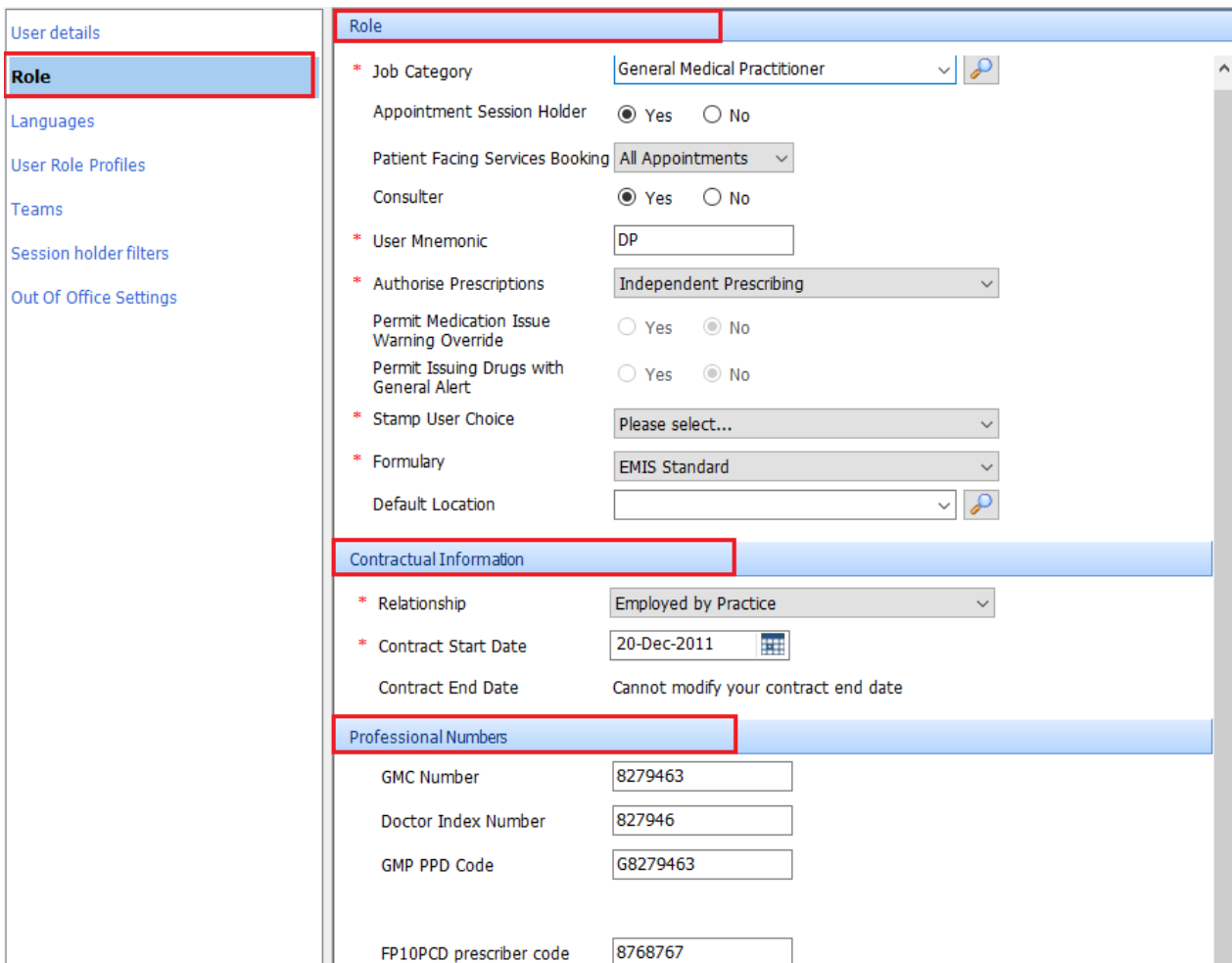
Contractual Information:

Relationship	Select appropriate relationship to the practice
Contract Start Date	Set the start date for the user (if this is a future date they will not show as active until that date)
Contract End Date	Leave blank if not known

Professional Numbers:

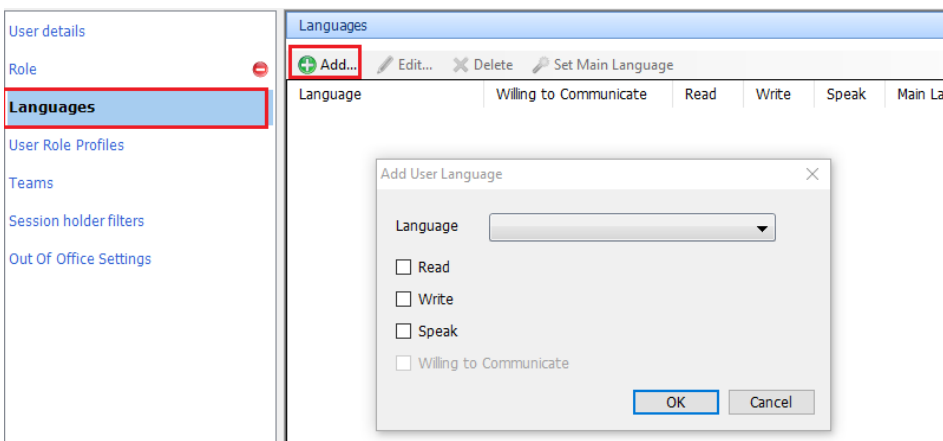
Professional Numbers (if not pre-populated from an existing user and applicable to job category):	Complete the GMC /NMC Numbers etc. (you can get this information from the main GP Practice)
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c. Languages (user language skills):

Click **Add** and select the **language** and if they can Read, Write or Speak this language, continue to add more if necessary.

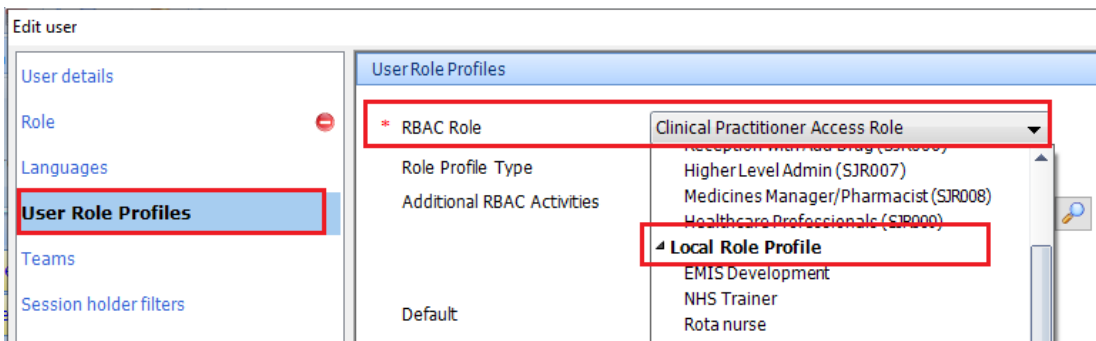


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d. User Role Profile:

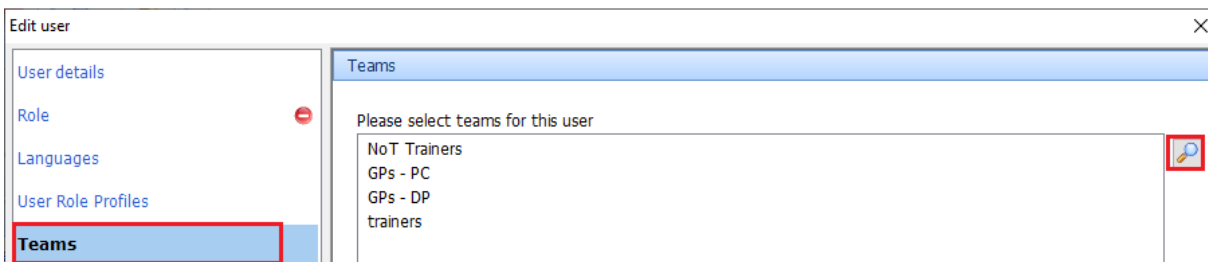
Select an **appropriate RBAC role** from the menu (where possible attempt to match the role that will be matched to the smartcard and use **Local Role Profiles**)

Note: The smartcard can be synced to this user at a later date



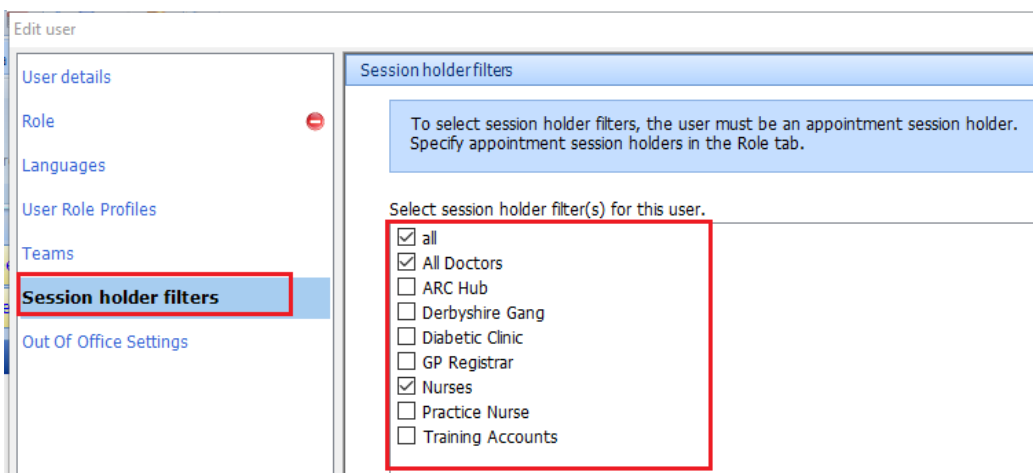
e. Teams:

Select the teams the user belongs to. **This can be done at a later date.**



f. Session holder filter:

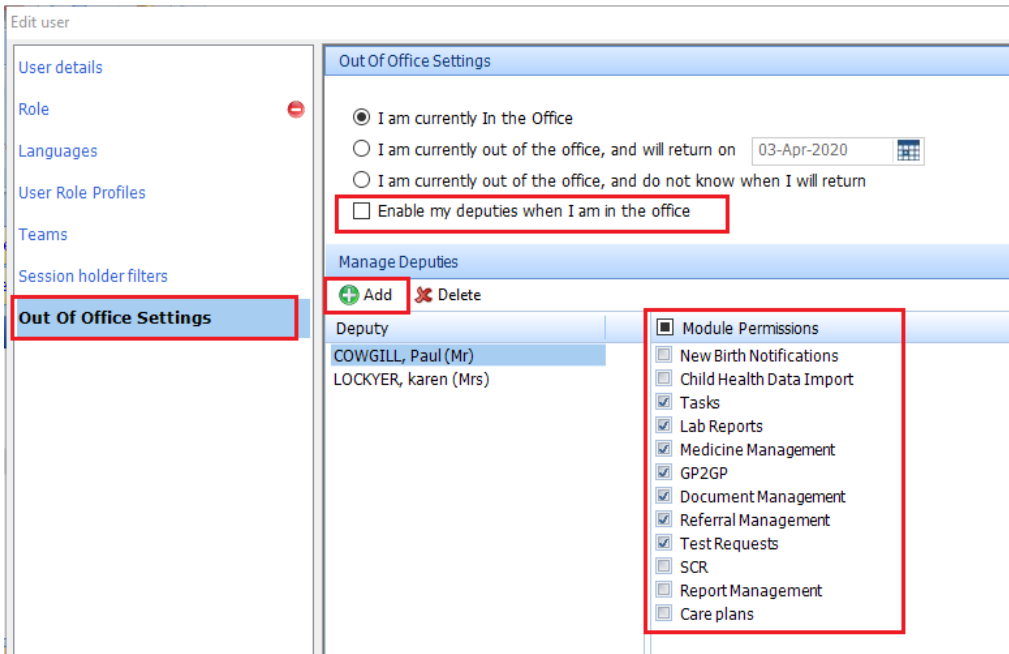
Click to select what **session holder filters** will display for the staff member when using the appointment book.



g. Out of Office Settings:

The users out of office settings can be configured and who will be set as the deputy for particular workflow items.

Note: Practice decision to enable deputies whilst the user is in the office (review existing policies and procedures).



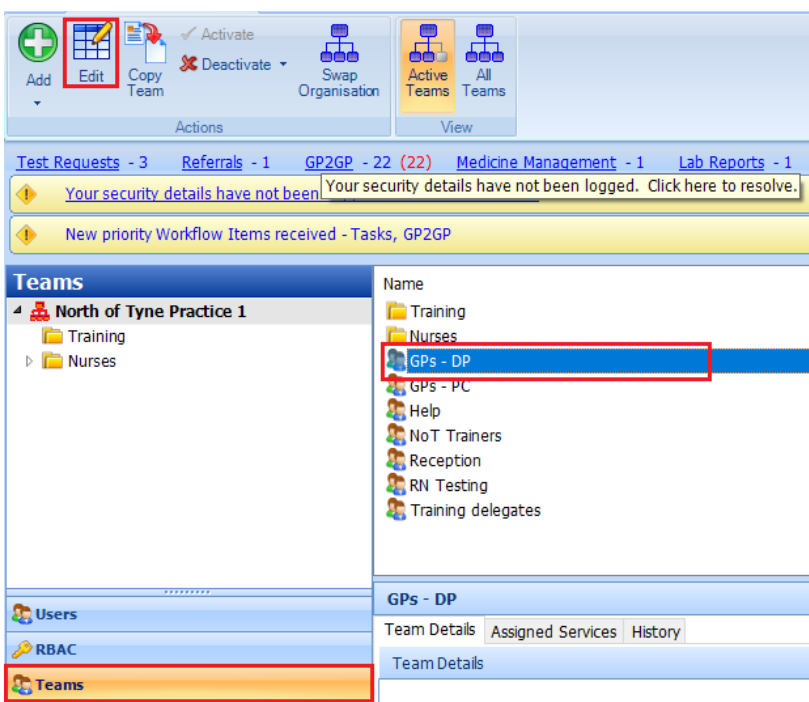
The screenshot shows the 'Edit user' interface. On the left is a navigation menu with 'Out of Office Settings' highlighted in a red box. The main content area has two sections: 'Out of Office Settings' and 'Manage Deputies'. In the 'Out of Office Settings' section, the 'Enable my deputies when I am in the office' checkbox is highlighted in a red box. In the 'Manage Deputies' section, the 'Add' button is highlighted in a red box. Below the 'Deputy' list, a 'Module Permissions' list is shown in a red box, containing items like 'New Birth Notifications', 'Child Health Data Import', 'Tasks', 'Lab Reports', 'Medicine Management', 'GP2GP', 'Document Management', 'Referral Management', 'Test Requests', 'SCR', 'Report Management', and 'Care plans'.

4. Click **OK** when complete

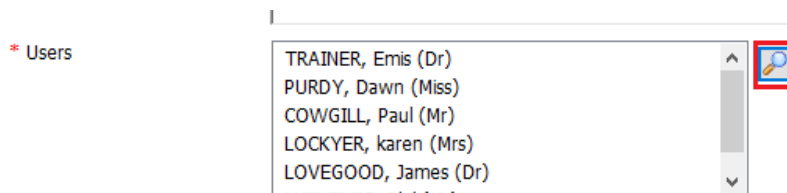
Organisation Configuration

Organisation configuration will need to be updated to include the staff member in teams to enable Group Tasks, if this is a clinician to allow referrals and to update Session Holder Filters from within the appointment book.

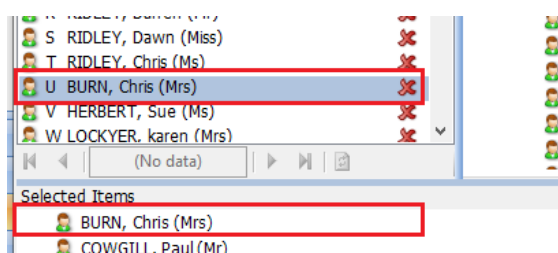
1. Click **EMIS Menu – Configuration – Organisation Configuration**
2. Click **Teams**, highlight the relevant team (top right pane) and click **Edit**



3. Click the **magnify icon** and search for the **new staff member**

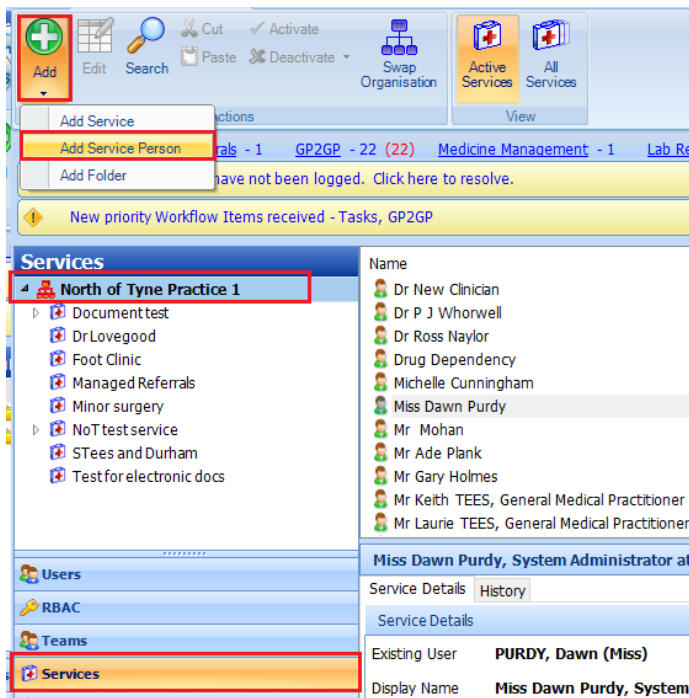


4. Double click when found to add to the **bottom pane**, click **OK** when done



5. From within Organisation Configuration click **Services** (staff who can refer patients)

6. Highlight the **practice name** (top left pane) and click **Add**, select **Add Service Person**



7. Click **Existing User** drop down menu and select the **new user** if they are to refer patients

8. Click the drop down menu and select **Both Internal and External** for **Make Referrals** and **Accept Referrals**. Click **OK** when done

Edit Service Person

Service Person Details

Enter service person details below.

* Existing User

* Display Name

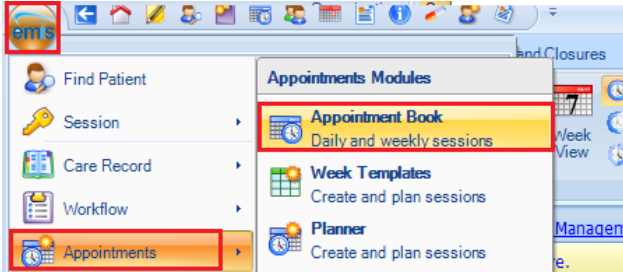
Information

* Make Referrals

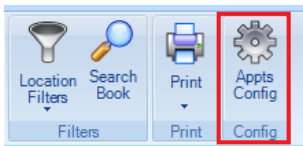
* Accept Referrals

Speciality

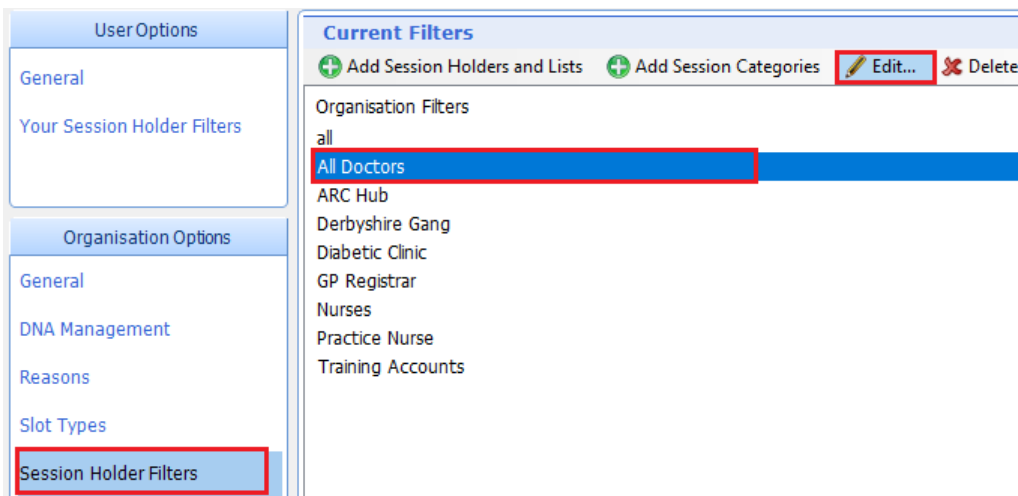
9. Click **EMIS Menu – Appointments – Appointment Book**



10. Click Appts Config



11. Click **Session Holder Filters**, highlight the relevant session group and click **Edit**



12. Click the **magnify icon** and search for new staff member

13. Double click when found to add to the **bottom pane**, click **OK** until you return to the appointment book

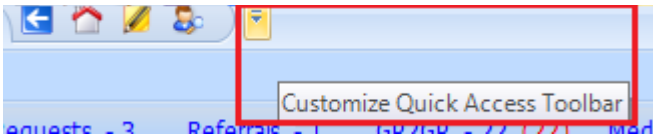
14. The staff member will now display within the relevant session holder filter



User Configuration

Once the user has logged on to EMIS Web they may want to configure the **Quick Access Toolbar**

1. Click **Customise Quick Access Toolbar**



2. Highlight from the left pane and click **Add (this will depend on the user's role)**, click **OK** when done

