

NECS Clinical Systems Specialist Team

SystemOne – Archiving Users

You can only archive SystemOne user accounts if you are a System Administrator.

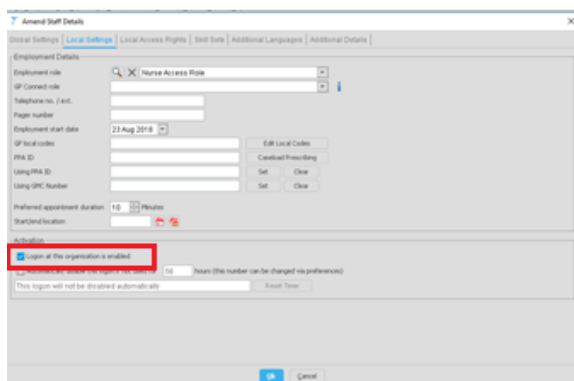
You may want to archive a user's SystemOne account because they have left your organisation permanently or will be absent for an extended period, for example long term sick leave. You can reinstate the account quickly when the staff member returns.

Before archiving a user's account you must do the following, where applicable:

1. Disable the user's logon.
2. Transfer any rotas the user has to another member of staff or delete the rotas.
3. Delete any pending visits the user has or reassign the visits to another member of staff.
4. Transfer patients on the user's caseload to another member of staff.
5. Transfer any patients who have the user set as their registered or usual GP (you must wait until the day following the transfer to archive the user account).
6. Ensure that the user is not the nominated senior staff member or Privacy Officer at your organisation.

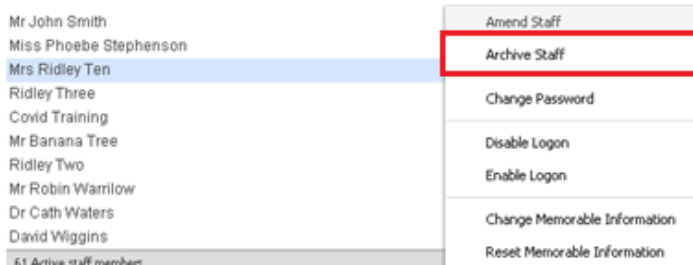
Disable Logon

1. Select **Setup - Users & Policy - Staff & Organisation Setup** from the Main Menu.
2. Select the relevant member of staff from the list.
3. Click **Amend Staff**.
4. Remove the tick from the Logon enabled at this organisation tick box under the Activation section on the Local Settings tab.
5. Click **Ok**.

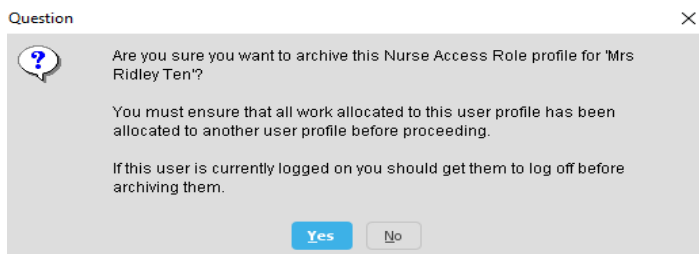


Archive Staff

1. Select **Setup - Users & Policy - Staff & Organisation Setup** from the Main Menu.
2. Select the relevant member of staff from the list.
3. Right click on the member of staff and select **Archive Staff**.



4. Click **Yes** to the warning message.



The account is no longer active on SystmOne and the user's name is moved to the **Archived Staff** tab of the Staff & Organisation Setup screen.