North of England Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

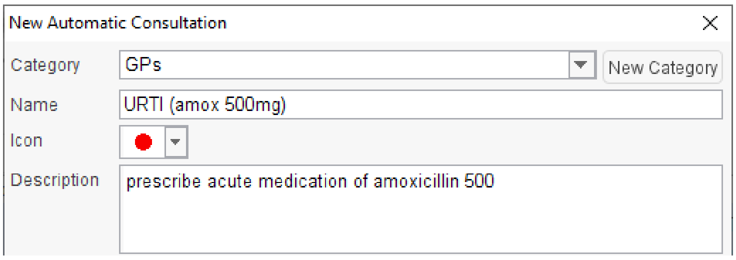
SystmOne – Auto Consultations

Creating an Auto Consultation

1. Open the **Setup** menu. Select **Workflow Support** and select **Automatic Consultations**

2. Click **New**

3. The New Automatic Consultation dialogue will display

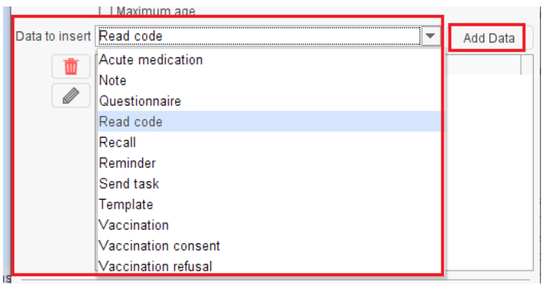


4. Select a **Category** for your auto consultation. You can create a **New Category** if necessary e.g. GPs or Nurses

5. Enter a **Name** for the auto consultation and select an icon of your choice. You may also want to add a **Description** of its use

6. Select a relevant gender and age range if needed

7. Select an option from the **Data to insert** drop-down list, this will determine which action takes place in the consultation. Then click **Add Data**



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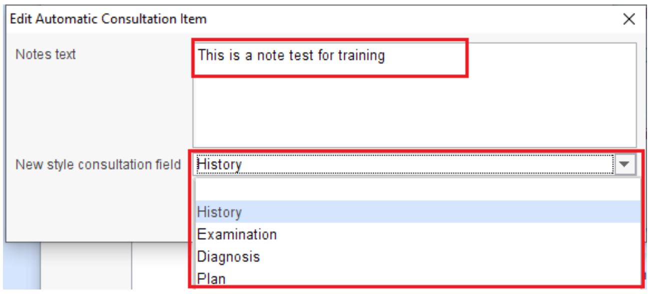
Note: Depending on what option you add, you will see different criteria to complete. You can use an Auto-Consultation to launch an acute medication, a questionnaire, a recall, a vaccination, a clinical template or a task. You can also use an Auto-Consultation to add some pre-defined text or a coded entry to a consultation

8. To add pre-defined text, select **Note** from the data to insert drop down and click **Add Data**

9. Type in the required **text** and select which field the text will display within the consultation i.e. History, Examination, Diagnosis or Plan



10. If required choose a **View to select** this would open when the Auto-Consultation is launched

11. Select an **Event details template** if you want to also set event details for the Auto-Consultation. Click the **New Template** button to create a template to complete the event details screen

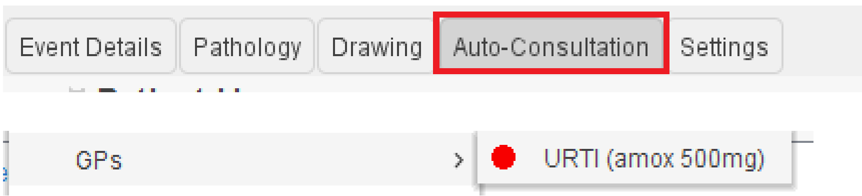
12. Click **Ok**

13. Right click on your **Auto-Consultation**. This will allow you to **Amend, Copy, Publish** or **Delete** which are also buttons on the toolbar

Using an Automatic Consultation

1. Retrieve a patient record

2. Click on the **Auto-Consultation** button located within the toolbar, locate the **relevant category** and click the auto consultation to be used



3. The consultation will now be triggered in the record

4. Add any further information to the consultation and **Save** the record when complete