



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne - Online Service Configuration Guide



Author: NECS Clinical Systems Specialists Team



Partners in improving local health



North of England
Commissioning Support

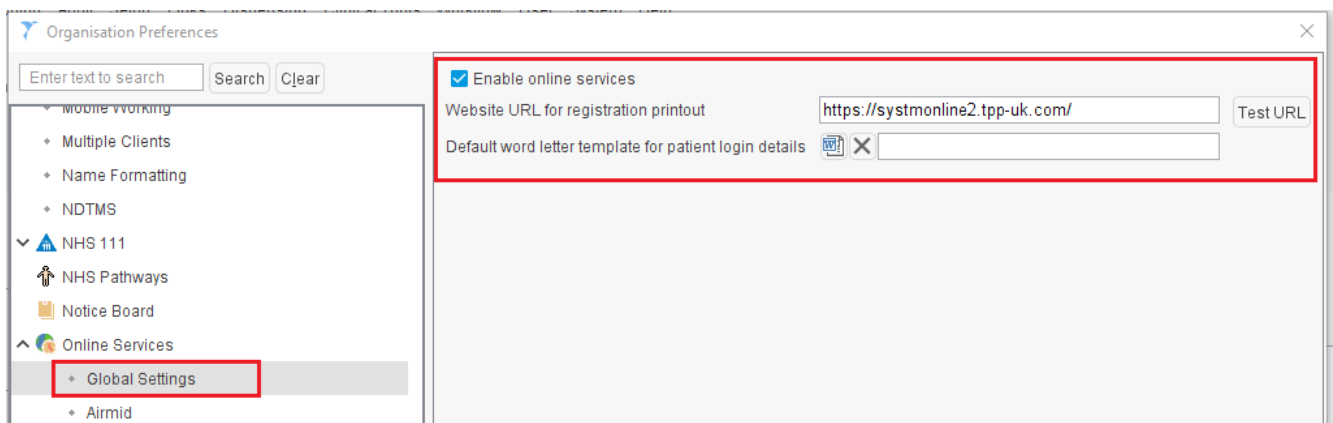
Table of Contents

Contents

Enable Online Services.....	3
Enable Airmid.....	3
Appointment Booking.....	5
Appointment Cancellation	6
Medication Requesting.....	7
Online Messaging	7
Organisation Profile	8
Parental Access	8
Patient Communication.....	9
Patient Record Access.....	9
Self Registration.....	11
SystemOnline Messages	11

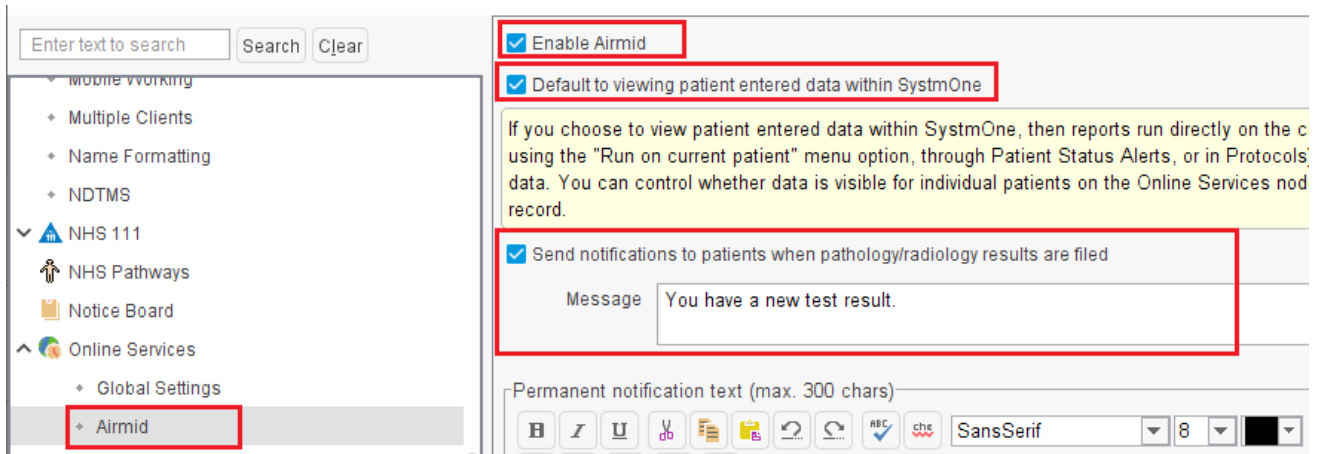
Enable Online Services

1. Click **Set-up – Users & Policy – Organisation Preferences – Online Services**
2. Click **Global Settings** and tick to **enable Online Services**
3. Within the **Website URL** decide on the following:
 - a. Complete your **Practice Website URL** if you want the patient to use your practice own website to access online services (must configure the website to allow access to online services)
 - b. Leave as the **TPP Default** <https://SystemOnline.tpp-uk.com>
4. Select a default **word letter template** to use when printing a patient registration for online services (this must be configured). Leave blank to use the SystmOne default letter

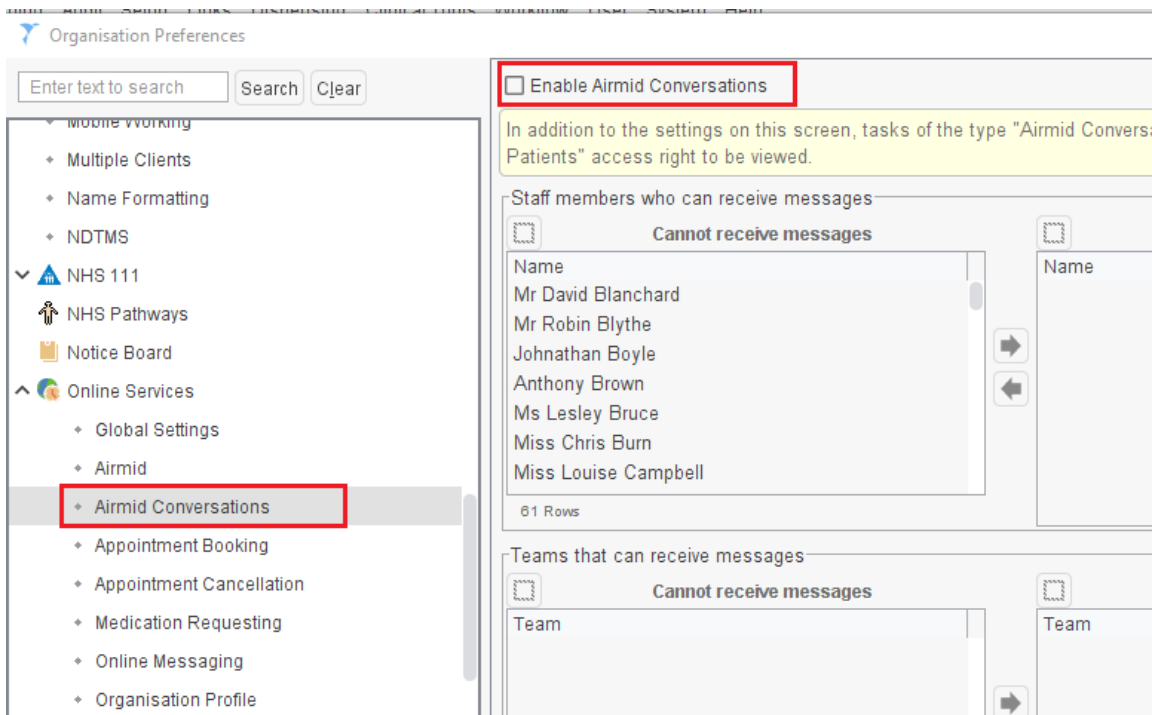


Enable Airmid

1. Click **Set-up – Users & Policy – Organisation Preferences – Online Services**
2. Click **Global Settings** and select **Airmid**, tick to **enable Airmid** (Online services must be enabled also)
3. Airmid allows patients to record information which by default will display within the journal, untick if you do not wish to see this data
4. A Notification message can be sent to a patient once the pathology result is filed. Change this message if necessary or untick if you do not wish to use this function



5. Click **Airmid Conversations**. Tick to **Enable Airmid Conversations** and select the relevant staff members or teams who will receive tasks from a patient



Appointment Booking

1. Click **Appointment Booking** and tick to **Enable Appointment Booking**
2. Tick to enable appointment booking for remotely shared rotas if applicable e.g. Extended Hours hub
3. The practice will need to decide upon the following and complete accordingly:

Permit patients to booking appointments in the next N weeks	Specify how far in advance a patient can book an appointment
Prevent appointment bookings N minutes before it starts	Specify the number of minutes to prevent a patient from booking an appointment before the start time
Limit to first N available slots in a rota	If relevant specify the number of slots to choose from within a rota
Allow patients to book N future appointments	Specify the number of appointments a patient can book in the future at one time
Minimum days in advance patients can book appointment N cut off time	Specify the minimum days in advance (cut off point) a patient can book an appointment and if relevant set the cut off time. This is usually set to 0

Permit patients to book appointments in the next week(s)

Prevent appointment booking minutes before it starts

Limit to first available slot(s) in a rota

Allow patients to book future appointments

Minimum days in advance patients can book appointments Cutoff time

4. Click if you wish to **restrict bookings** to a patient's **usual branch site**
5. Click to **restrict** to bookings to a **patients usual GP only**
6. Click to set a **minimum bookable slot length** and what the duration will be

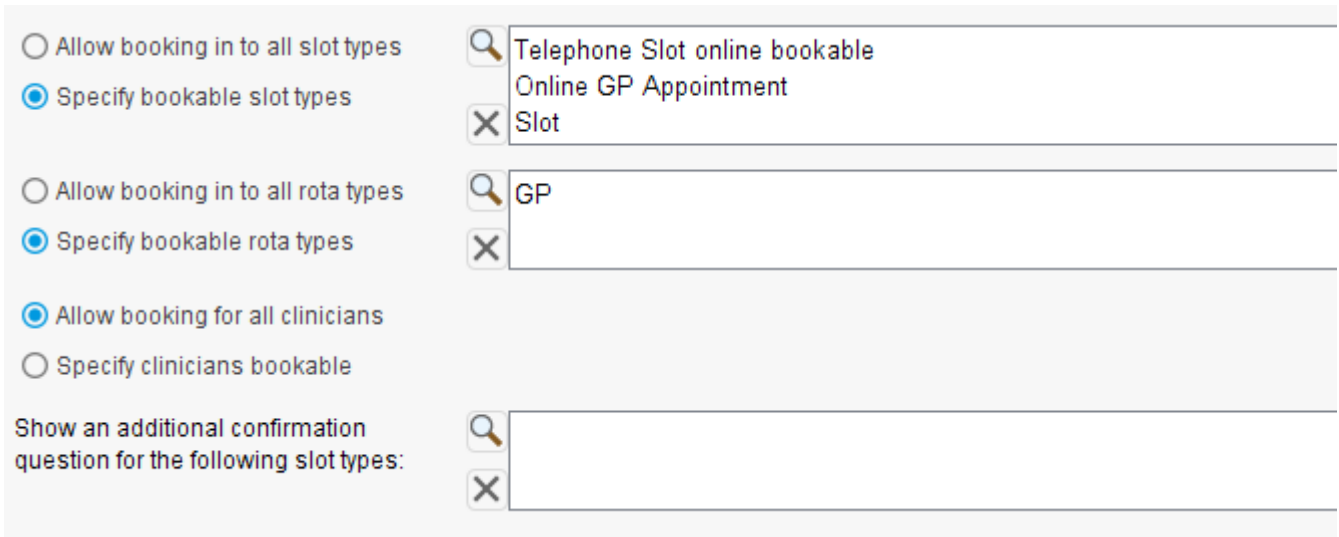
Restrict booking to patient's usual branch (this will not apply to externally booked appointments)

Restrict booking to patient's usual GP (this will not apply to externally booked appointments)

Minimum bookable slot length minutes

7. Click to **allow bookings** in to all **slot types** or specify what slots will be available
8. Click to **allow bookings** in to all **rota types** or specify what rota types will be available
9. Click to **allow bookings** for all **clinicians** or specify the clinicians

10. If relevant specify what slot types you want an additional confirmation message to display asking if they are sure they want to book this appointment.



Allow booking in to all slot types
 Specify bookable slot types

Allow booking in to all rota types
 Specify bookable rota types

Allow booking for all clinicians
 Specify clinicians bookable

Show an additional confirmation question for the following slot types:

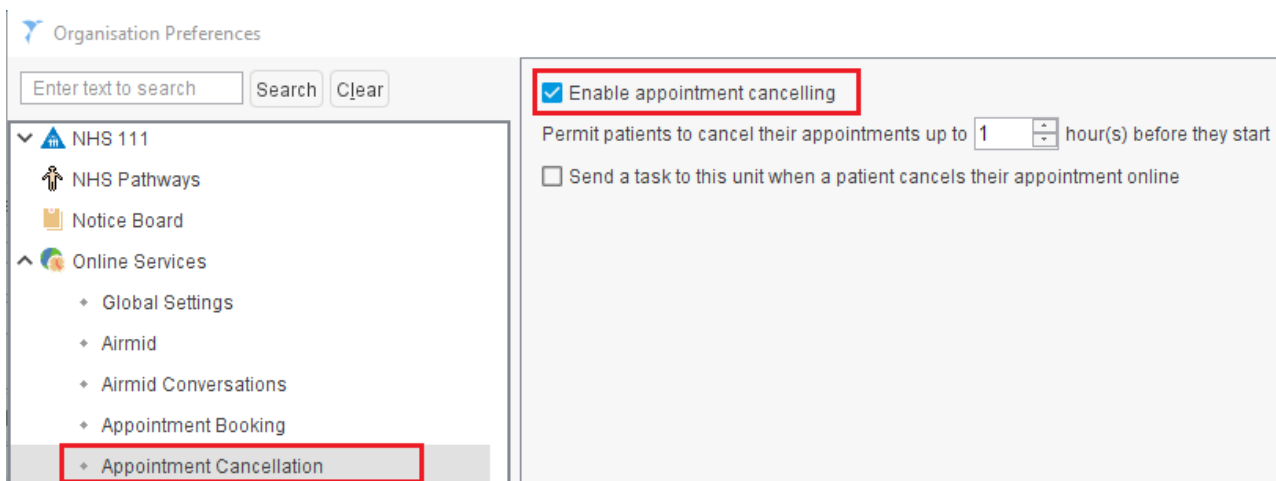
Search: Telephone Slot online bookable
 Online GP Appointment
 X Slot

Search: GP
 X

Search:
 X

Appointment Cancellation

1. Click **Appointment Cancellation** and tick to **enable appointment cancelling**
2. Specify the **number of hours** a patient can **cancel their appointment** before the actual start time.
3. Tick if you want a **task to alert users** a patient has **cancelled an appointment**



Organisation Preferences

Enter text to search Search Clear

- NHS 111
 - NHS Pathways
 - Notice Board
 - Online Services
 - Global Settings
 - Airmid
 - Airmid Conversations
 - Appointment Booking
 - Appointment Cancellation

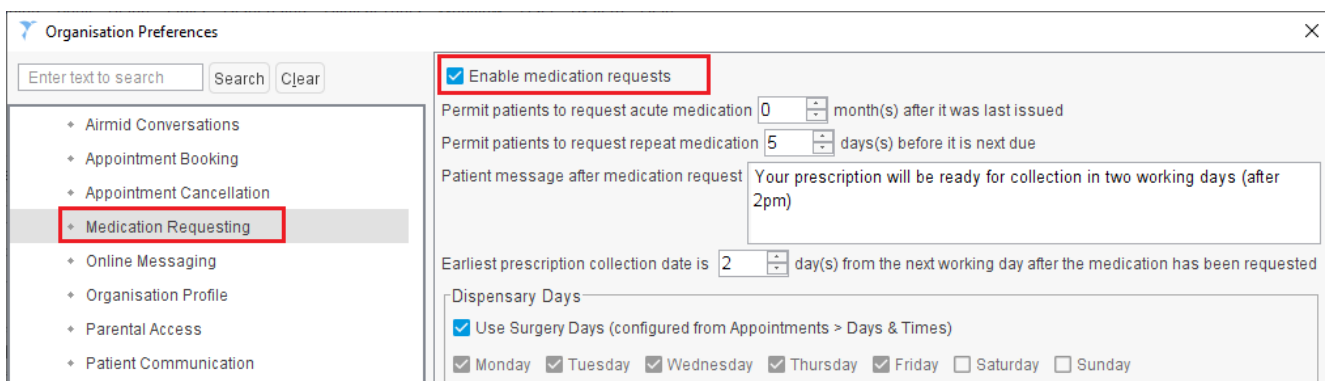
Enable appointment cancelling

Permit patients to cancel their appointments up to 1 hour(s) before they start

Send a task to this unit when a patient cancels their appointment online

Medication Requesting

1. Click **Medication Requesting** and tick to **enable medication requests**
2. Specify the **number of months** to **display acute medication** after it was last issued. Leave this as 0 if you do not want acute medication to display
3. Specify the **number of days** a patient can **request repeat medication** before the due date
4. Type a patient message that will display after they have requested the medication for example collect from chemist in two working days
5. Specify the **earliest prescription collection date**
6. For **dispensing practices only** specify the dispensing days

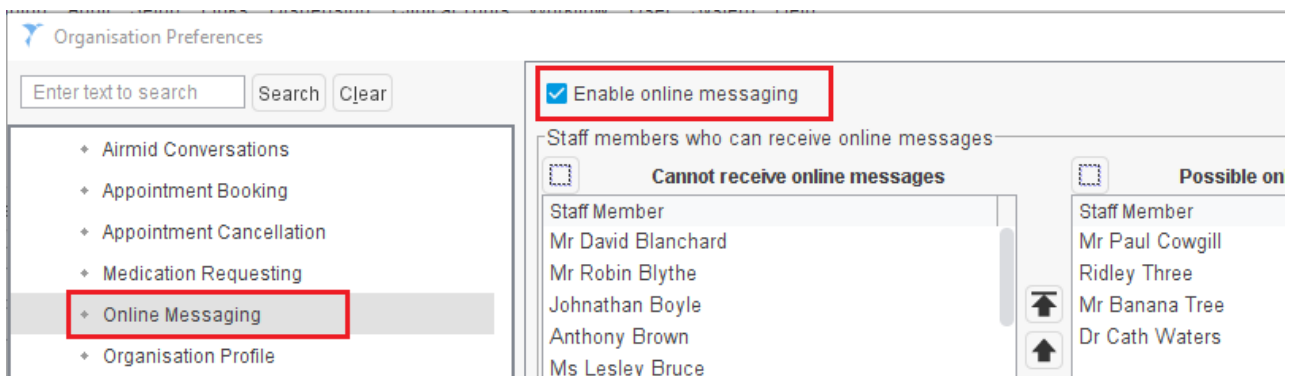


The screenshot shows the 'Medication Requesting' settings in the 'Organisation Preferences' window. The 'Enable medication requests' checkbox is checked and highlighted with a red box. Below it, the following settings are visible:

- Permit patients to request acute medication: 0 month(s) after it was last issued
- Permit patients to request repeat medication: 5 days(s) before it is next due
- Patient message after medication request: Your prescription will be ready for collection in two working days (after 2pm)
- Earliest prescription collection date is: 2 day(s) from the next working day after the medication has been requested
- Dispensary Days:
 - Use Surgery Days (configured from Appointments > Days & Times)
 - Monday Tuesday Wednesday Thursday Friday Saturday Sunday

Online Messaging

1. Click **Online Messaging** and tick to **Enable online messaging**
2. Specify the staff members and user groups who will receive any messages a patient may send



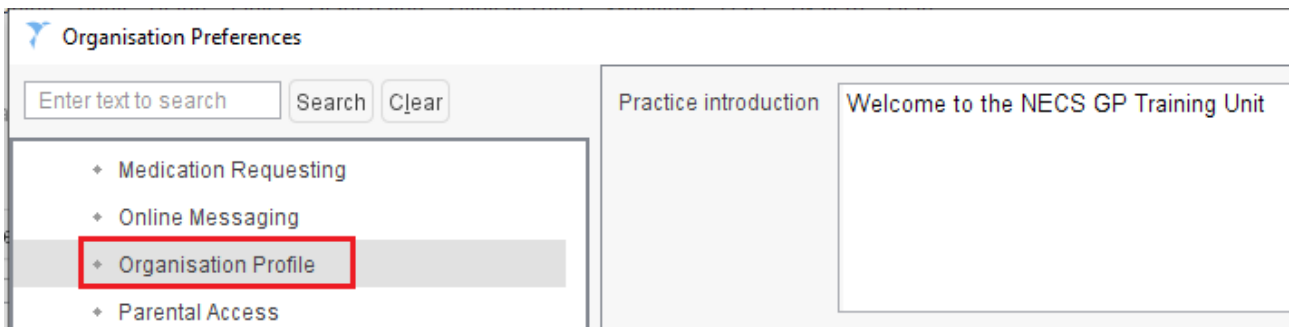
The screenshot shows the 'Online Messaging' settings in the 'Organisation Preferences' window. The 'Enable online messaging' checkbox is checked and highlighted with a red box. Below it, the following settings are visible:

- Staff members who can receive online messages:

Cannot receive online messages	Possible on
Staff Member	Staff Member
Mr David Blanchard	Mr Paul Cowgill
Mr Robin Blythe	Ridley Three
Johnathan Boyle	Mr Banana Tree
Anthony Brown	Dr Cath Waters
Ms Lesley Bruce	

Organisation Profile


1. Click **Organisation Profile** and specify your practice introduction message of online services



The screenshot shows the 'Organisation Preferences' interface. On the left, a navigation menu lists 'Medication Requesting', 'Online Messaging', 'Organisation Profile' (highlighted with a red box), and 'Parental Access'. At the top, there is a search bar with 'Enter text to search', 'Search', and 'Clear' buttons. On the right, the 'Practice introduction' field contains the text 'Welcome to the NECS GP Training Unit'.

Parental Access

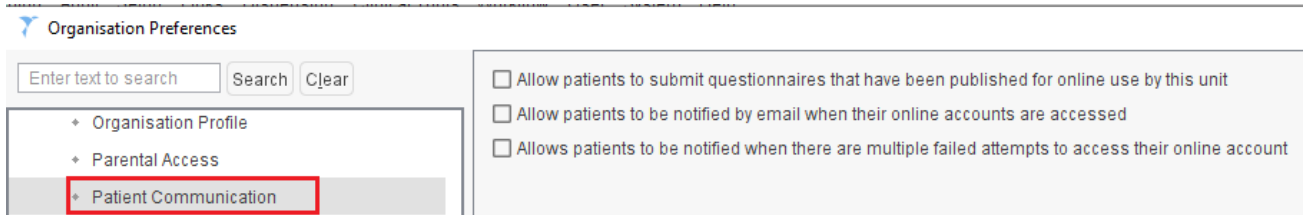
1. Click **Parental Access** and specify the age which **Parental Access will be allowed**, e.g. if 12, then the login will be disabled for parental access once the patient reaches 12 years old
2. The system will display the last time this field was updated



The screenshot shows the 'Organisation Preferences' interface with 'Parental Access' selected in the navigation menu (highlighted with a red box). The main content area shows 'Parental access available for children until the age of 12 years' (with '12' in a dropdown menu, highlighted with a red box) and 'Parental accesses were last updated on 22 Jan 2016' (with the date in a dropdown menu, highlighted with a red box).

Patient Communication

1. Click **Patient Communication**
2. Tick if you want the ability for patients to **submit Questionnaires** that have been published for use via Online Services
3. Tick if you want the system to **send a patient an email** when their online accounts are accessed (a generic email will need to be configured within SystmOne)
4. Tick to allow **notifications** to be sent to a patient if their online service account has had **multiple failed attempts**



Organisation Preferences

Enter text to search Search Clear

- + Organisation Profile
- + Parental Access
- + **Patient Communication**

Allow patients to submit questionnaires that have been published for online use by this unit

Allow patients to be notified by email when their online accounts are accessed

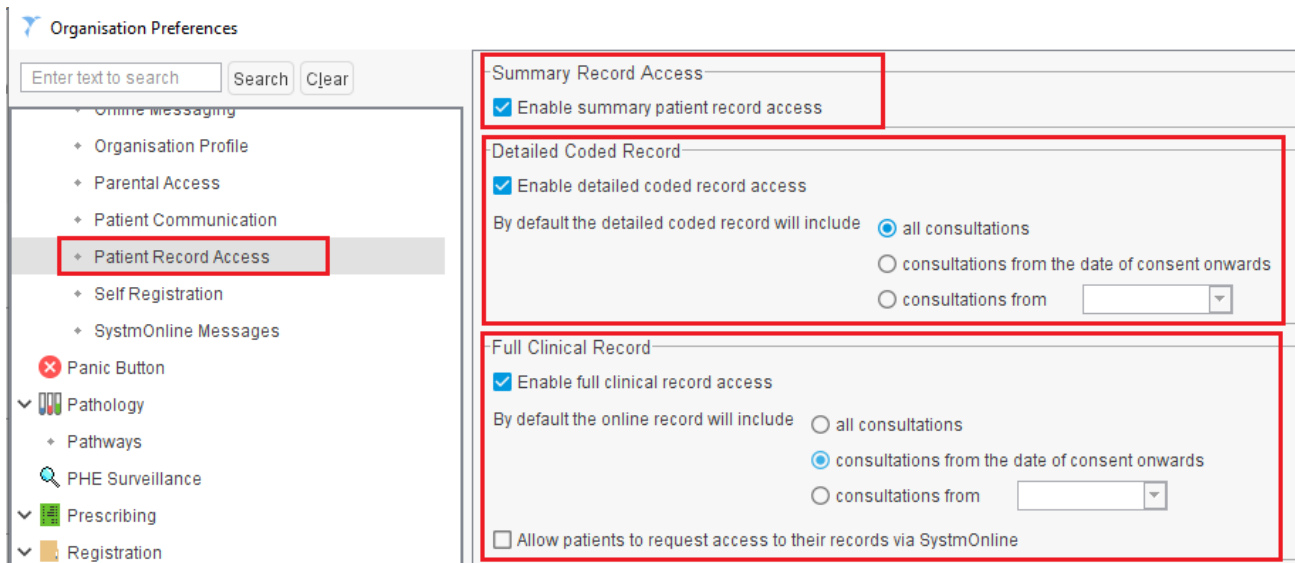
Allows patients to be notified when there are multiple failed attempts to access their online account

Patient Record Access

1. Click **Patient Record Access**. Please review the **GMS Contract for Further Guidance**
2. There are **three levels of access**:
 - a. **Summary Record Access** – Sensitivities & Allergies , Medication and Vaccinations
 - b. **Detailed Coded Record** – All of the above and coded data including diagnosis / problems, numerics, pathology reports and requests and referrals
 - c. **Full Clinical Record** – All of the above including communication / Letters and free text data

The following can be set as a default for detailed and full coded record:

- a. **All Consultations**
- b. **Consultation from the date of consent onwards** (Online Service Registration date)
- c. **Consultation from** (practice to add a specific date)



Organisation Preferences

Enter text to search Search Clear

- Online messaging
 - Organisation Profile
 - Parental Access
 - Patient Communication
 - Patient Record Access**
 - Self Registration
 - SystmOnline Messages
- Panic Button
- Pathology
 - Pathways
- PHE Surveillance
- Prescribing
- Registration

Summary Record Access

Enable summary patient record access

Detailed Coded Record

Enable detailed coded record access

By default the detailed coded record will include all consultations

consultations from the date of consent onwards

consultations from

Full Clinical Record

Enable full clinical record access

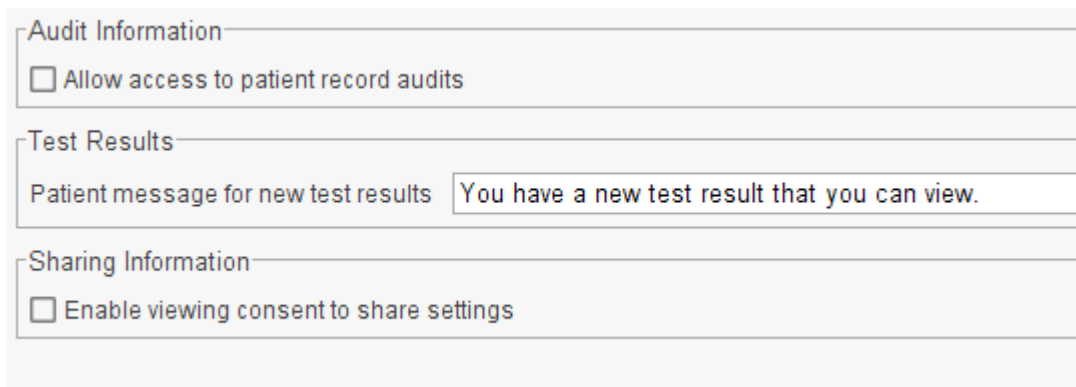
By default the online record will include all consultations

consultations from the date of consent onwards

consultations from

Allow patients to request access to their records via SystmOnline

3. Tick to allow if a **patient can request access to their** records via SystmOnline. A task will be received from the patient and their online account will need to be updated.
4. Tick to **allow access to patient record audits** – this will enable a patient to see staff members who have recorded information or access their medical record
5. Type a default message that a patient will see if they have access to their test results
6. Tick to **enable the viewing consent to share settings** in their medical record



Audit Information

Allow access to patient record audits

Test Results

Patient message for new test results

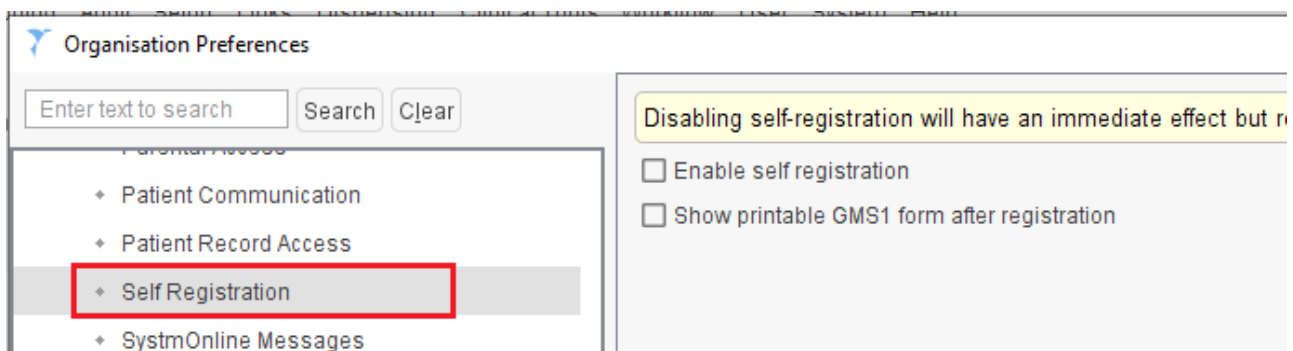
Sharing Information

Enable viewing consent to share settings

Partners in improving local health

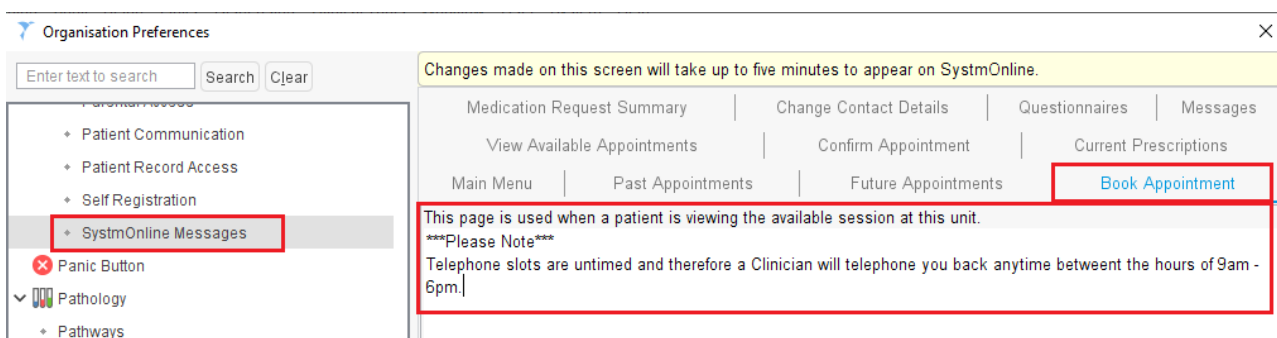
Self Registration

1. Click **Self Registration**
2. Tick to **enable self registration**. This will allow a patient to request to register at your practice (this does not give them access to Online Services). A task will be received for the registration to be completed
3. Tick to **show printable GMS1 form after registration**. Prompt for the GMS1 form to display for completion after requesting to register



SystemOnline Messages

1. Click **SystemOne Messages**. The practice can configure messages to display on the various online pages the patient has access to
2. Click the **relevant section** and **type your message** to display when the patient access this section of SystemOnline



3. When the SystemOnline configuration is complete, Click **Ok**

Note: Changes may take several minutes to update when accessing SystemOnline.