



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne - Housekeeping Guidelines Mini Guide



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Table of Contents

Contents

Housekeeping	3
SystemOne Changes	3
Tasks	3
Organisation Configuration	3
Users.....	3
Organisation Groups	4
Templates, Protocols, Views	5

Housekeeping

It is advisable for practices to perform “housekeeping” duties on a regular basis to ensure that resources being used are current and up-to-date and to prevent the system from slowing down. It can cause a clinical risk if out-of-date templates and resources are used.

SystemOne Changes

It is strongly advisable for practices to monitor SystemOne Changes for any changes to the system and fixes to existing issues or bugs.

1. On the **Home** screen, click the **Changes** button or
2. Click **System - SystemOne Changes**
3. When read, each change message should be marked as **Don't show again** to remove from the Home screen. They are still available to see on the SystemOne Changes screen

Tasks

Ensure that all tasks are dealt with appropriately and marked as **Complete** to remove them from the task list. Unnecessary tasks in the list will slow the system down.

Organisation Configuration

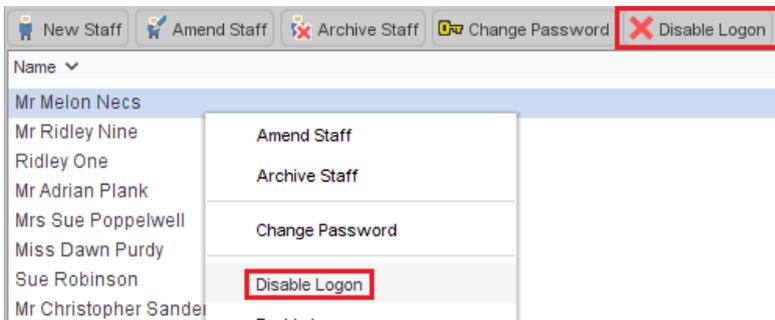
Users

When an employee leaves the practice, ensure their user logon is disabled and their account is archived. Depending on their practice role, e.g. a GP, a series of steps may need to be performed prior to being able to deactivate/archive the account either by the user themselves or by an administrator (see 3. below).

4. Click **Setup - Users & Policy - Staff & Organisation Setup**



5. Select the relevant staff member and click **Disable Logon** on the toolbar or right click and select **Disable Logon**



This will prevent the User from logging in whilst the account is being archived.

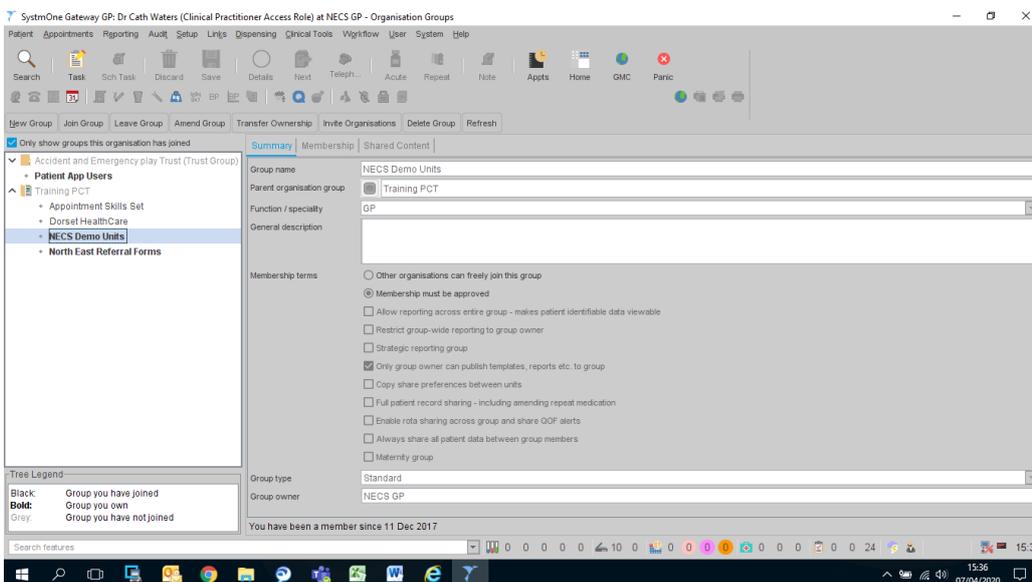
6. Prior to archiving a member of staff, the following steps may require action

- a. **Rotas** - transfer any rotas the user has to another member of staff or delete the rotas
- b. **Visits** - delete any pending visits the user has or reassign the visits to another member of staff
- c. **Patients** - 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).
- d. **Privacy Officer** - ensure that the user is not the Privacy Officer at your organisation
- e. **PPAID** – if user's PPAID is being used by other staff, amend to use another member of staff's PPAID

Organisation Groups

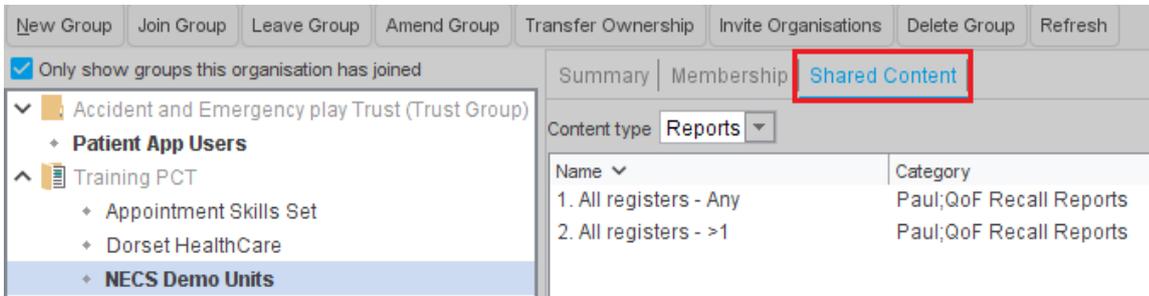
Practices may have joined Organisation Groups that they no longer need to be part of. **Caution must be used** if the decision is made to leave these groups as this will also remove shared resources e.g. Templates, Protocols, Views, etc. which will no longer be accessible.

1. Click **Setup - Users & Policy - Organisation Groups**



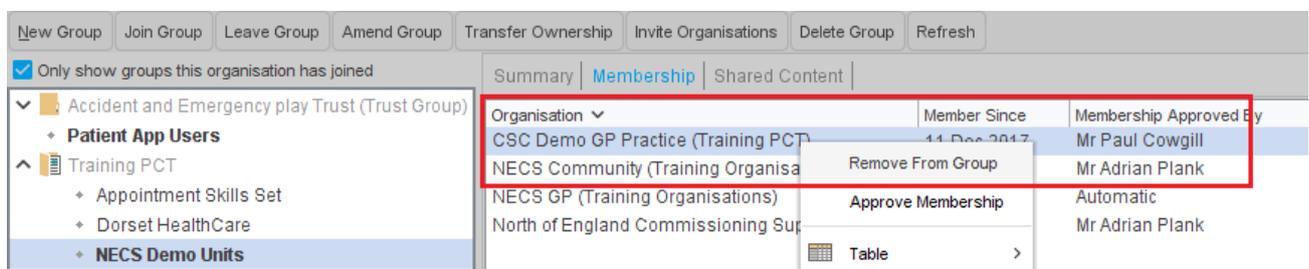
This will show groups the practice is part of.

2. Select a group and click the **Shared Content** tab to see what is shared



Name	Category
1. All registers - Any	Paul;QoF Recall Reports
2. All registers - >1	Paul;QoF Recall Reports

3. Best practice, initially, would be to make certain Shared Content resources, e.g. Templates, Reports, Protocols, etc., are made **inactive** or **disabled** to see whether anything else is affected. These resources can be enabled or disabled from the relevant screens. Some resources may be embedded into other templates, views or protocols that are still required for use. If resources no longer work correctly after making them inactive or disabled, these can be made active or enabled again accordingly.
4. If after some time (suggest 1 year) there are no negative affects then consider leaving the group



Organisation	Member Since	Membership Approved By
CSC Demo GP Practice (Training PCT)	14 Dec 2017	Mr Paul Cowgill
NECS Community (Training Organisa		Mr Adrian Plank
NECS GP (Training Organisations)		Automatic
North of England Commissioning Sup		Mr Adrian Plank

Templates, Protocols, Views

Some templates, protocols or views will be provided by SystemOne (System Wide) or Organisation Groups that have been joined (e.g. DCS, Ardens) and, although these cannot be deleted, they can be made inactive or disabled.

Check the following to see if there are any resources that can be deleted, made inactive or disabled. Initially it would be advisable to deactivate/disable and wait a while to check that they are not required before deleting. Note also that some may be shared.

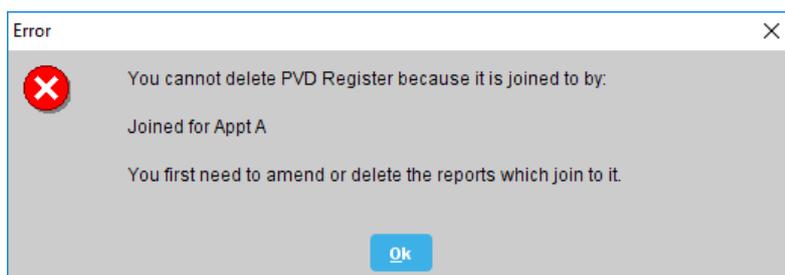
1. **Vaccinations** – click **Setup - Vaccinations - Vaccination Templates**
2. **Appointments** - click **Setup - Appointments**
 - a. Rota Templates
 - b. Appointment Templates

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3. **Data Entry** – click **Setup - Data Entry**
 - a. Event Details Templates
 - b. New Template Maintenance
 - c. Task Templates
 - d. eWorkflow Templates
 - e. Questionnaires
4. **Data Output** – click **Setup - Data Output**
 - a. Patient Status Alerts
 - b. View Maintenance
5. **Referrals & Letters** – click **Setup - Referrals & Letters**
 - a. New Word Letter Templates
 - b. Recall Template Management
 - a. Scanning Rules
6. **Workflow Support** – click **Setup - Workflow Support**
 - a. Input Prompts
 - b. Automatic Consultations
 - c. Protocols – these are often linked to large reports and can affect performance of the system
7. **Reports** –click **Reporting - Clinical Reporting**

On **Local Reports** folder, sort on the **Last Run** column to see the oldest first and delete as appropriate.

Some reports may have been used in **Joined** reports and you will be unable to delete these without amending the reports that are joined to it.



Note: Deactivating templates can cause a prompt stating “You have marked too many Templates as inactive for the current unit”. Delete or reactivate some others before attempting to mark any more as inactive for the current unit.