NECS Clinical Systems Specialist Team

SystmOne – Commonly Asked Questions and Answers

Author: NECS Clinical Systems Specialists Team

Revision date: 14/05/2020

NECS Clinical Systems Specialist Team

Table of Contents

Contents

NECS Clinical Systems Specialist Team
Configuration Questions

1. Our practice Pharmacist is trying to configure his toolbar but says he does not have the rights. However, he does at other practices. How can we give him permission to amend his toolbar as he wants to get AccRx on to his toolbar?

Answer:
Setup – User and Policy – Organisation Prefs – Toolbars – Permissions Tab – Move the required name into the Permitted list – Click **Ok**
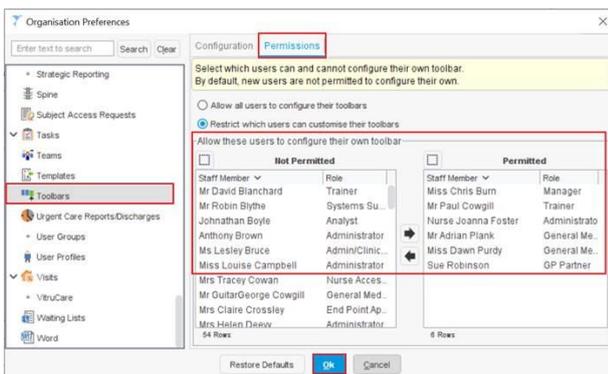
2. How can I remove the Bank Holidays from the Appointment Ledger calendar and assign a Rota Template to run on a Bank Holiday?
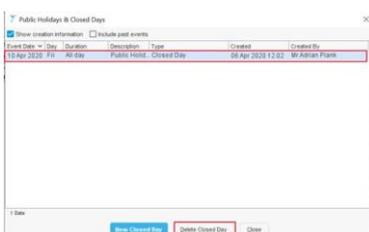
Answer:
To add or remove Public Holidays/ Closed Days from S1:

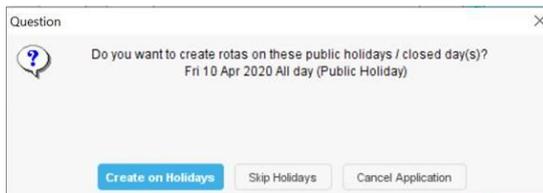a. **Setup - Users and Policy - Public Holidays and Closed Days**

d. Highlight the listed Holiday
e. Select **Delete Closed Days**

However, if for any reason you cannot delete the public holiday, **you can still apply rotas:**

    a. Apply the rota as required
    b. When asked if you want to create the rota on a holiday date, select Create on Holiday

3. Why can't I assign rotas to a staff profile?

Answer:
    The staff profile needs to have the access right **Sees Patients** granted. A System Administrator will need to provide you with this access right, as it cannot be added to your Smartcard.
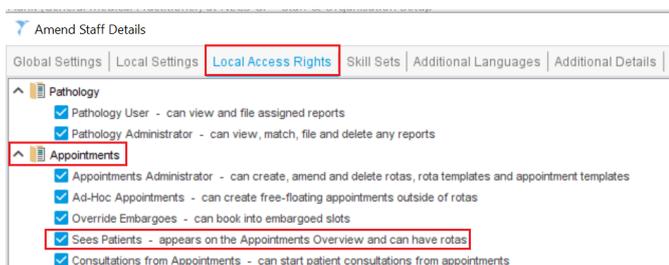
Logging In Questions

1. How can I add an organisation to my Smartcard?

Answer:
    The organisation will need to be added by your Registration Authority (RA) team. This cannot be done by TPP.

2. It has been more than 30 days since I last logged in with my Smartcard, how can I log in to SystmOne without my Smartcard?

Answer:
    If you are faced with the dialog explaining that it has been more than 30 days since you last logged in with a Smartcard, you will need to log in to SystmOne using your Smartcard.

    You will not be able to log in manually and there is no other way to bypass this message. This is for security reasons.

NECS Clinical Systems Specialist Team

Appointment Questions

1. Is there a quick way of finding a patient's booked appointment, rather than trying to find them in the ledger?

Answer:
F9 Function Key, allows you to find any related appointments that have been booked for the patient and also, it allows you to arrive them or manage the appointment with the same right click options that you would see in the Ledger
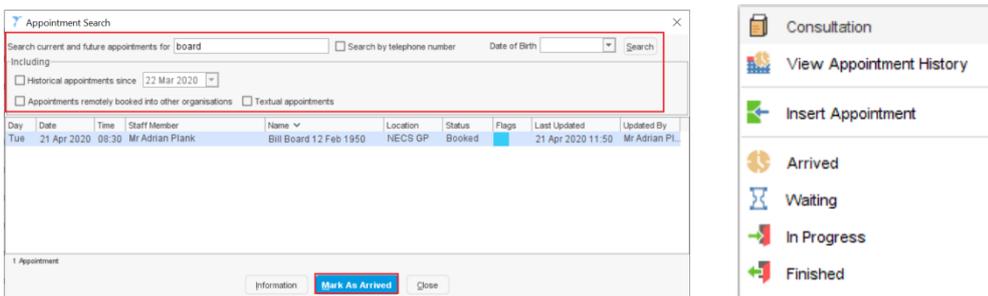

2. I have accidentally deleted a rota containing appointments, how can I restore this?

Answer:
Currently, there is no way to restore a deleted rota. However, you can use the audit functionality which will show you which appointments were booked into the deleted rota and who they were for. This will allow you to re-create the missing rota and re book the correct patients in the correct timed slots.

To locate this information do the following:
Audit - Appointments - Appointment Changes. From here you can refine the search to the day the rota was for and the staff member it was assigned to. This gives you all the details required to re-book the appointments.

NECS Clinical Systems Specialist Team
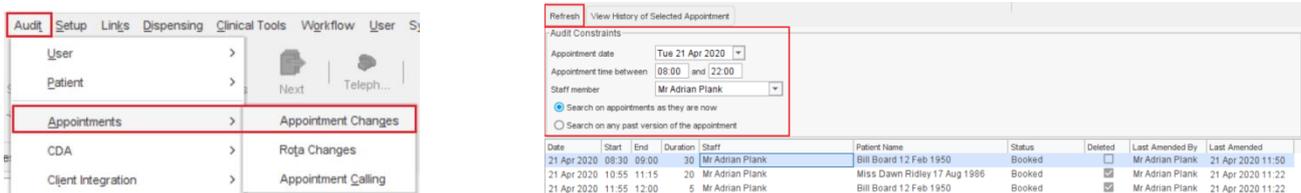
E-Referrals (Choose and Book) Questions

1. Why, when creating a Choose & Book Referral, does it state that my patient does not have a Registered GP Practice?

Answer:

This usually indicates that the patient does not have a registered GP practice recorded on the Spine. To resolve this you will need to **deduct and re-register the patient**.

Scanning Questions

1. How do I scan documents in to the system from NHSmail?

Answer:

You will need to navigate to **Workflow - Document Management - Acquired Documents - Settings - Organisation settings - Document Processing – NHS Mail -** Tick **Use Document Management for NHSmail.**

Here you can configure which folder SystmOne will look in for NHSmail attachments by clicking **Select folder** and select the relevant folder.