



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne

Creating a New User



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Table of Contents

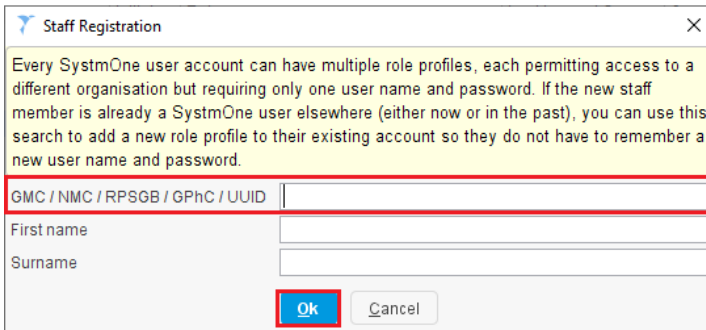
Contents

Creating a New User Account.....	3
Organisation Preferences	5
User Preferences	9

Creating a New User Account

If the staff member is an existing user to SystmOne and is using a smartcard, **you must** create the account using the smartcard number. This will avoid conflicts with GMC Numbers and duplicate profiles.

1. Click **Set-up – Users & Policy – Staff and Organisation Set-up**
2. Click **New Staff**
3. Type the **smartcard number** into the GMC / NMC / RPSGB / GPhC / UUID field and click **OK**



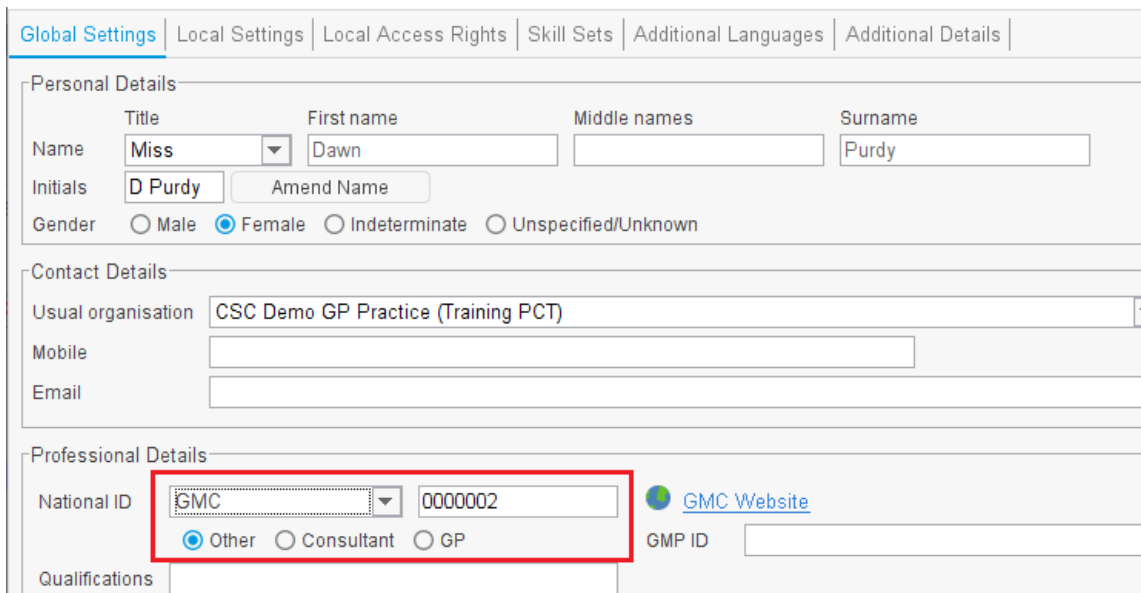
4. A dialogue will display listing the staff who match the details you have entered. Ensure you select the correct name and click **OK**
5. The **Amend Staff Details** dialogue will display. Complete as follows:
 - a. **Global Settings.** The staff members main practice details will display and they can also use their existing username and password

The **GMC Number / NMC** will automatically display as this is associated with the smartcard, however this can be added if necessary.

For admin or clinicians without a Professional ID (HCAs) who need to access ICE this should be **Pathology ID** alternatively select **Local Person ID**

Ensure Other is selected as this is not main practice for the user

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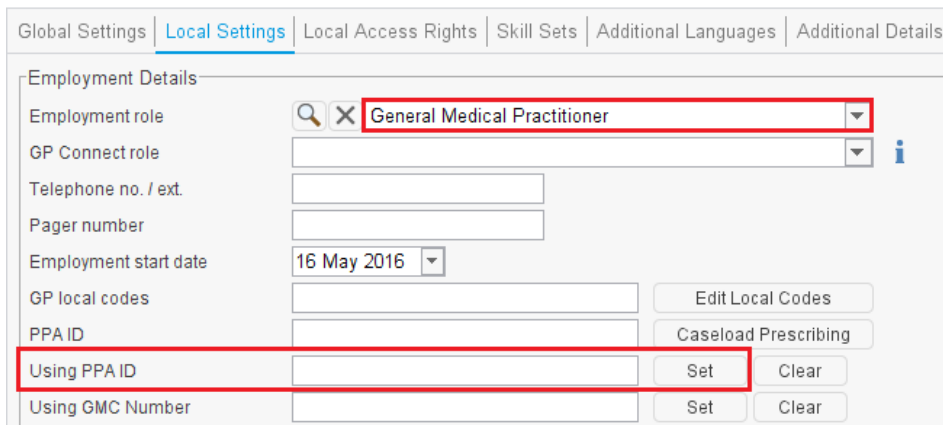


The screenshot shows the 'Global Settings' page with the following sections:

- Personal Details:** Title (Miss), First name (Dawn), Middle names, Surname (Purdy), Initials (D Purdy), Gender (Female selected).
- Contact Details:** Usual organisation (CSC Demo GP Practice (Training PCT)), Mobile, Email.
- Professional Details:** National ID (GMC, 0000002), GMC Website link, Other selected, Consultant, GP, GMP ID, Qualifications.

- b. **Local Settings.** Select an appropriate **Employment role** e.g. General Medical Practitioner (this will be overwritten to what is set on the smartcard)

If this is not the clinician's usual practice **you must** select **Set - Using PPA ID** and select an appropriate GP if they will be signing prescriptions (Nurses, ACPs and Pharmacists do not require a PPA ID to be set)



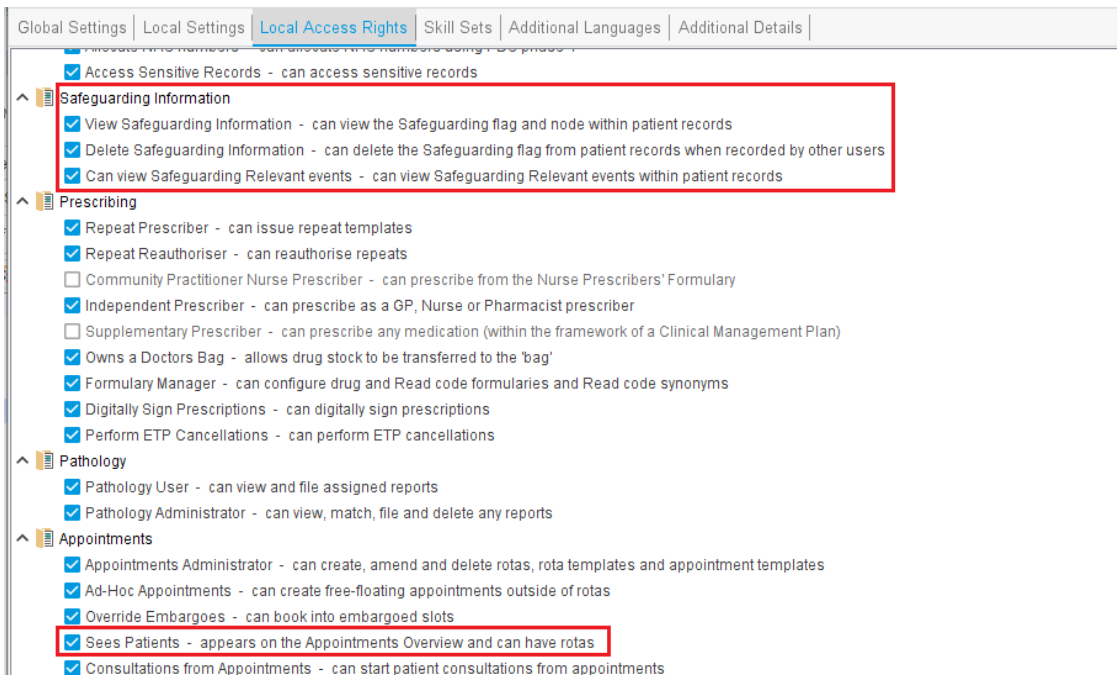
The screenshot shows the 'Local Settings' page with the following sections:

- Employment Details:** Employment role (General Medical Practitioner), GP Connect role, Telephone no. / ext., Pager number, Employment start date (16 May 2016), GP local codes, PPA ID, Using PPA ID (Set selected), Using GMC Number.

- c. **Local Access Rights.** The local access rights will automatically populate when the staff member logs in with their smartcard. However **you must** click the relevant **Safeguarding Information** access and **Sees Patients (for Clinicians)** within the appointment section

Note: Review all other rights to match local practice policy.

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6. When the staff details are complete click **OK**

Organisation Preferences

Organisation preferences will need to be updated to allow the clinician to visit patients, refer patients, override medication warnings etc.

1. Set-up – Users & Policy – Organisation Preferences

Review and update the following if necessary:

- a. **Appointment – Appointment Bookmarks.** If the practice have organisation bookmarks you may want to include staff in to relevant groups. Select an **existing bookmark** and tick to select the **new staff member**



b. Block Appointments. Add to can **block appointments** if necessary

The screenshot shows the 'Appointment Configuration' menu on the left, with 'Block Appointments' highlighted in red. To the right is a list of staff members: Johnathan Boyle, Anthony Brown, Ms Lesley Bruce, Miss Louise Campbell, Mrs Tracey Cowan, Mr GuitarGeorge Cowgill, Mrs Helen Deevy, Ridley Eight, Lucy Farquharson, Ridley Five, Ridley Four, Joanne Gaffney, Mr Mathew Garness, Ms Gayle Guthrie, Miss Chris Burn, Mrs Karen Lockyer, Miss Dawn Purdy, Mr Nicholas Murray, Dr Grape Necs, Mr Melon Necs, Sue Robinson, Dr Cath Waters, and Nurse Joanna Foste. A vertical toolbar on the right contains navigation arrows (up, down, left, right) highlighted in red.

c. Staff Ordering. Change order of staff when using the appointment ledger / overview

The screenshot shows the 'Patient Call Screen' menu on the left, with 'Staff Ordering' highlighted in red. To the right is a table with columns 'Staff Member', 'Role', and 'Unit'. The table contains the following data:

Staff Member	Role	Unit
Mr Adrian Plank	General Medical Practitioner	
Dr Cath Waters	Clinical Practitioner Access Role	
Miss Chris Burn	Manager	
Miss Dawn Purdy	General Medical Practitioner	
Mr Gary Holmes	Trainer	

A vertical toolbar on the right contains navigation arrows (up, down) highlighted in red.

d. Clinical Policy – Referrals Out. Add the new user if they can **refer patients**

The screenshot shows a search bar at the top with 'Enter text to search', 'Search', and 'Clear' buttons. Below is a list of items: Problems, QOF, Referrals In, and Referrals Out. 'Referrals Out' is highlighted in red. To the right is the 'Referring Staff' section with 'Add User' and 'Remove User' buttons. Below these buttons is a list of staff members: Mrs Vicky Ellis-Brown, Andrea Francis, and Mrs Bev Hunt.

e. Sharing. If applicable select who is **prompted / not prompted** to complete consent to share.

The screenshot shows the 'Reminders' menu on the left, with 'Sharing' highlighted in red. To the right are settings for 'View shared record' (selected) and 'Policy' (practice policy). Below is a table titled 'Users Prompted to Record Consent' with columns 'Prompted' and 'Not'. The table contains the following data:

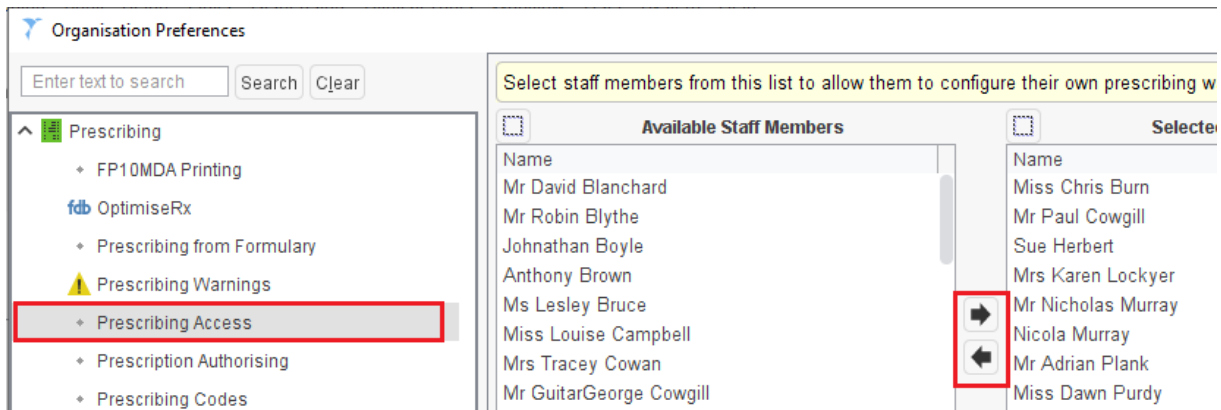
Prompted		Not
Name	Role	Name
Mrs Tracey Cowan	Nurse Access..	Miss Dawn Purdy
Nurse Joanna Foster	Administrator	Mr Paul Cowgill
Ross Naylor	Trainer	Mr Robin Warrilow

Navigation arrows are visible between the 'Prompted' and 'Not' columns.

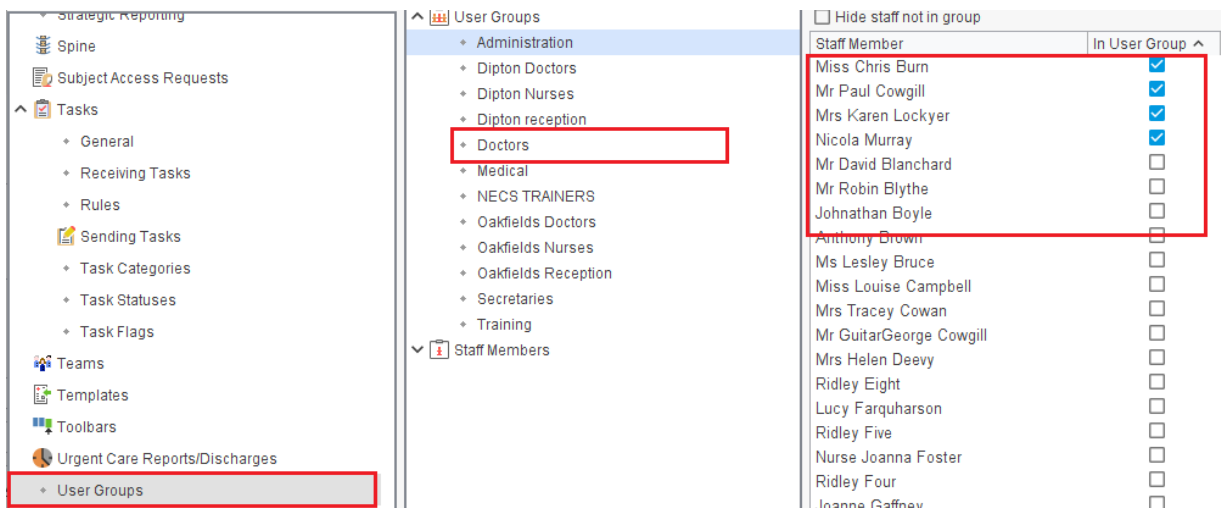
- f. **Tabbed Journal.** If used and there are practice created filters, you may need to add the new staff member if a filter contains specific staff names.



- g. **Prescribing – Prescribing Access.** Depending on your Prescribing Warnings you may want the new staff member to **configure their own prescribing warnings (Clinical prescribers only)** e.g. override sensitivities and allergies. Move from the left pane to the right.

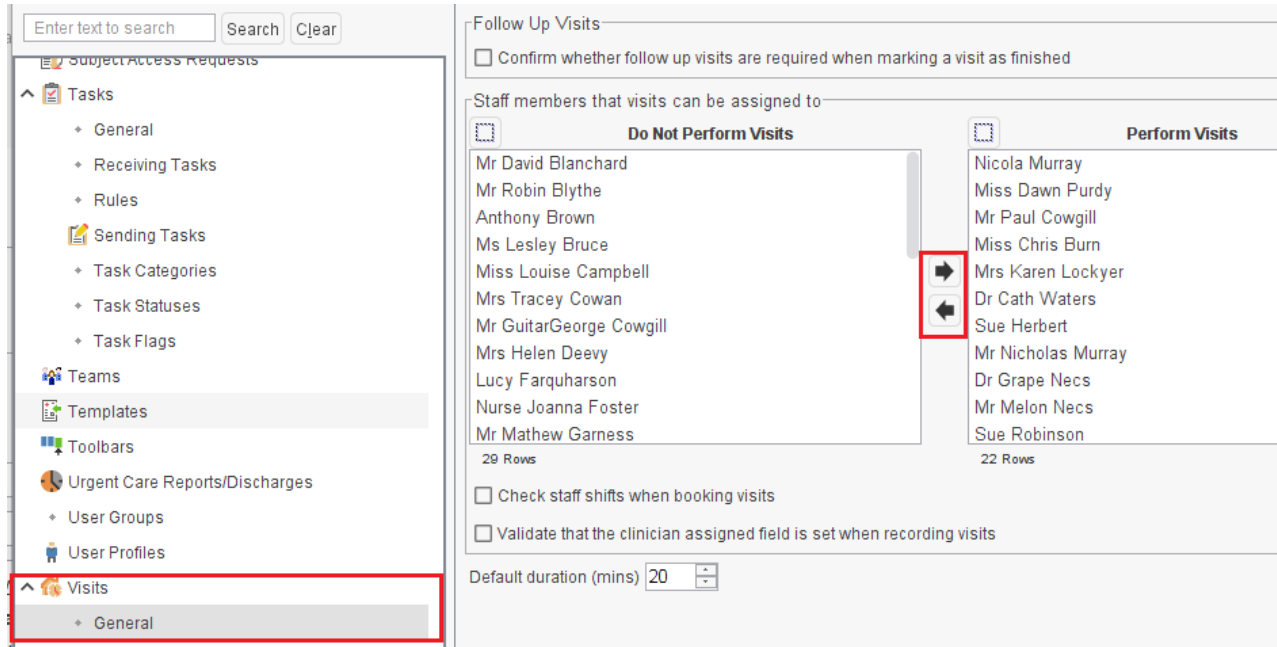


- h. **User Groups.** You may want to add the new staff member to existing user groups for tasks and notifications. Select an **existing group** and **tick to select** from the right pane the staff member.



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- i. **Visits – General.** If the staff member will be allocated home visits add them to **Perform Visits**.



Enter text to search Search Clear

Subject Access Requests

- Tasks
 - General
 - Receiving Tasks
 - Rules
 - Sending Tasks
 - Task Categories
 - Task Statuses
 - Task Flags
 - Teams
 - Templates
 - Toolbars
 - Urgent Care Reports/Discharges
 - User Groups
 - User Profiles
 - Visits**
 - General

Follow Up Visits

Confirm whether follow up visits are required when marking a visit as finished

Staff members that visits can be assigned to

Do Not Perform Visits	Perform Visits
Mr David Blanchard	Nicola Murray
Mr Robin Blythe	Miss Dawn Purdy
Anthony Brown	Mr Paul Cowgill
Ms Lesley Bruce	Miss Chris Burn
Miss Louise Campbell	Mrs Karen Lockyer
Mrs Tracey Cowan	Dr Cath Waters
Mr GuitarGeorge Cowgill	Sue Herbert
Mrs Helen Deevy	Mr Nicholas Murray
Lucy Farquharson	Dr Grape Necs
Nurse Joanna Foster	Mr Melon Necs
Mr Mathew Garness	Sue Robinson

29 Rows 22 Rows

Check staff shifts when booking visits

Validate that the clinician assigned field is set when recording visits

Default duration (mins) 20

2. Click **OK** to save the organisation preferences.

User Preferences

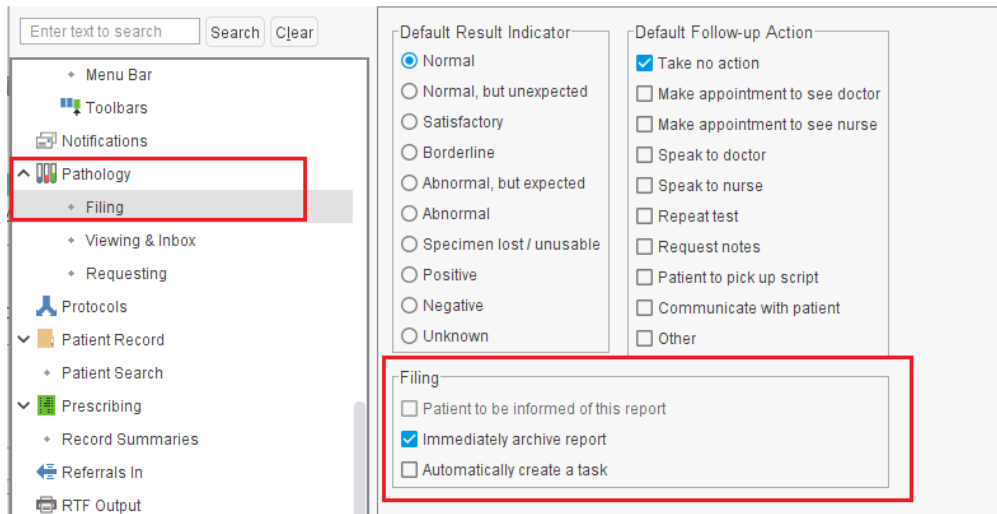
Once the user has logged on to SystmOne, they must update their user preferences.

Note: For Clinical staff, you may need to check with an existing GP to ensure these settings match, alternatively you can select to **Copy from Another User**.

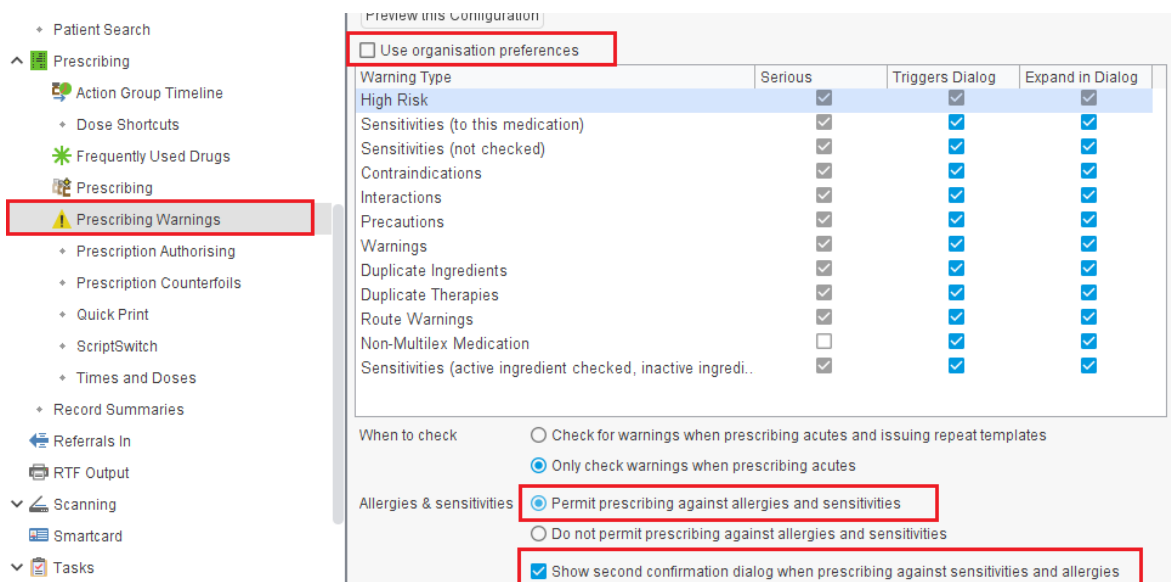
1. User – User Preferences

Review and update the following:

- a. **Pathology Filing.** This will need to match what the current practice process is for filing pathology results.

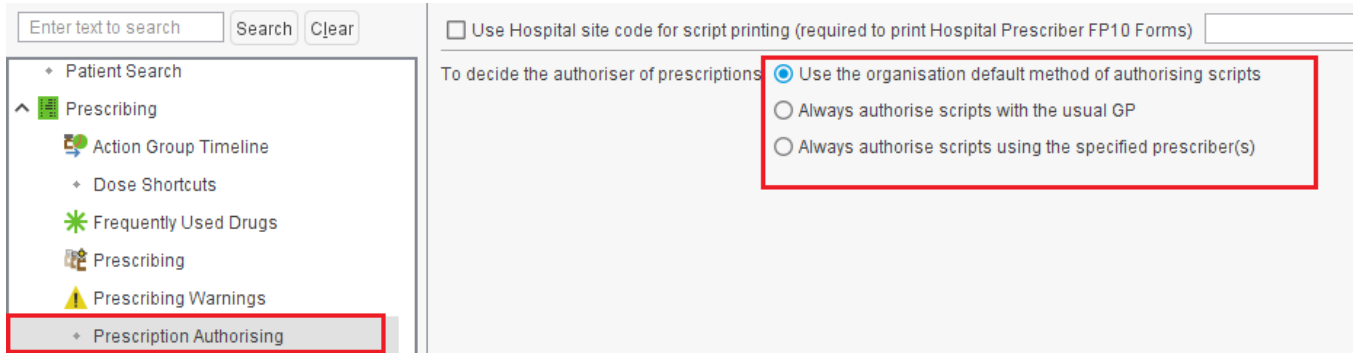


- b. **Prescribing – Prescribing Warning.** Untick use organisation preferences, click **Permit prescribing against allergies and sensitivities**.



- c. **Prescription Authorising.** Ensure **Use the organisation default method of authorising scripts** is selected for all clinical prescribers.

For **Non Prescribers** (no signing) this must be set as **Always authorise scripts with the usual GP**



Enter text to search Search Clear

Use Hospital site code for script printing (required to print Hospital Prescriber FP10 Forms)

To decide the authoriser of prescriptions

- Use the organisation default method of authorising scripts
- Always authorise scripts with the usual GP
- Always authorise scripts using the specified prescriber(s)

- 2 Click **OK** to save the user preferences