



Admin Introduction User Guide VI.I

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Introduction:

This user guide is aimed at providing each delegate with a basic introduction to SystmOne (SI). Delegates will still require specific role - based training within their organisation and this is highly recommended.

It is a legal responsibility to protect patient confidentiality. The responsibility for safeguarding and using confidential information appropriately rests with each organisation.

Overview of SystmOne:



About the Spine:

The aim of the Spine is to provide a national shared summary of patient information so that health professionals in England can share data quickly and effectively and have access to up - to - date information.

The Spine consists of several integrated computer systems and databases that deal with different types of information:

• **Patient Demographic data:** (name, address, date of birth): The Patient Demographics Box is located in the top right - hand corner of the screen when a Patient Record is open and shows various details about the patient (if recorded).

• Electronic Referrals:

- If you want to send a referral electronically to another SystmOne organisation, all the following criteria must be fulfilled:
 - You must have been granted the **Refer Electronically** access right.
 - The organisation you are sending the referral to must have been configured to receive electronic referrals.
 - The user you are sending the referral to must be set up to receive electronic referrals.

• Electronic Prescriptions (EPS):

- Enables the digital signing and electronic transmission of prescriptions directly to a dispenser of the patient's choice, with no need for a paper prescription.
- To produce electronic prescriptions, prescribers must:
 - Users must log on with their Smartcard
 - Prescribe using a valid Dictionary of Medicines and Devices (DM+D) code.
 - Prescribe by number not packs.
 - To receive electronic prescriptions, patients must:
 - The patient must be registered on the spine, with full GMS status and have a valid NHS number.
 - The patient should have a nominated Pharmacy.

• Summary Care Record (SCR):

- The Summary Care Record (SCR) is a summary of a patient's GP medical record uploaded to the Spine so that it can be accessed by any legitimate carer, regardless of the computer system they use.
- The circumstances when this is beneficial include when a patient is seen at a hospital or Out of Hours unit or when a temporary resident is seen at a GP practice.
- The National N3 SPINE Care Record Service runs up and down the country and contains summary care records and information from all clinical systems such as SystmOne, Emis Web, and other spine linked clinical systems.
- When a patient is registered to GP Surgeries or Community Units

GP2GP Transfers:

- **NOTE:** You must be logged on with your Smartcard to be able to perform a GP2GP transfer.
 - When you are registering a patient, if the patient's registration type is **Applied** and the patient was previously at a GP practice that does not use SystmOne, a request is automatically sent to Spine for the patient data to be extracted from the other practice's clinical system, ready for import into SystmOne.
 - This request is sent in the background during the registration process and is in the form of a **GP2GP Transfer In** task, which you will see listed on the Patient Home view when the Patient Record is displayed. The task will show the following details:
 - When SystmOne sent the request to the patient's previous practice.
 - When your request was acknowledged by the receiving practice.
 - When the patient data extracted from the other clinical system is ready for you to transfer to the SystmOne Patient Record.

NOTE: Instead of monitoring the Patient Home view in the individual Patient Record, you can use the GP2GP Transfers screen to track when data extracts from other clinical systems are ready for you to add to the relevant SystmOne Patient Record.

Login, Lock Out and Exit the System Correctly:

Two ways to log in:

Option I - NHS Smartcard Access:

• No one should use the system without using their **<u>Own</u>** Smartcard.



- Using your Smartcard will ensure that you are connected to the Spine.
- Use your Smartcard in the card reader on your keyboard or card reader slot on your laptop, complete appropriate fields and enter your passcode to activate your account.
 - Select the **SystmOne Live** icon on your desktop
 - When on the Authentication screen **Click** on the **Log on with NHS Smartcard** button.

systmone	tpp
Authentication	
Smart Card Authentication Log on with NHS Smart Card	
User Name & Password Authentication	
Log on	

• This will then take you to your Profile screen:

Welcome back		
Information	Enter text to search Clear	📰 Show hidden profile
You last used SystmOne yesterday at 09:40.	Community Services	
Click 'Log on' next to the profile that you want to use.	EDSM Community (Lincolnshire) Clinical Application Administrator, Last used 27 Sep 2018 09:52	Log on
You have 1 disabled or unusable profile. To view this, tick the 'Show hidden	eMBED Humber Community Unit Trainer, Last used 22 Jan 2019 12:59	Log on
profiles' option.	General Practice	
	EDSM GP (Lincolnshire) Clinical Application Administrator, Last used 20 Jul 2018 14:15	Log on
	eMBED Humber Training GP Trainer, Last used yesterday 09:40	Log on

- Select your Department/Unit from the drop-down list (if working at more than one).
- Click on the button which will then take you to your Home Screen.

NOTE: Ist time login – you may have additional fields to complete.

Option 2 - Username & Password:

- Username and Password will be given to you by your own Unit if they allow this method.
 - Enter Username and Password in the appropriate fields in the authentication screen as above and then Click on the Log on button to take you to your home screen.

NOTE: Username & password gives **NO Spine** functionality.

SystmOne Lock Out:

<u>Always lock your system</u> when leaving your machine or work area for any short period of time (going to the toilet/making a drink i.e. remaining in the office):

• Press FII and remove your Smartcard to: Lock the screen, Switch User or Shutdown the system:

Lock Out Sec	rity		X
eMBED Humi	er Training GP		
Password			
	<u>Ok</u> <u>S</u> hutdown	<u>N</u> ew User	

• If used to **Lock** or **Switch Users**, when you return you just need to log back in with your Smartcard and enter your pin number.

Governance, Security and Information Auditing:

Remember to Lock your PC (press either the **Windows Key** and or use the **Ctrl+Alt+Delete** then **Lock this Computer**) if moving away from your desk/work area as leaving data visible to others is not appropriate – reference to **Information Governance and Clinical Security**.

- Log Off If you're going out of the office/building for meetings or home visits etc., you should actually Log off the system and your PC. (Think about the fact that you may not come back into the office depending on the situation.)
- **Role Based access controls -** What people can do on the system and the information that they can access depends on their role and the type of activities they carry out. These are on your Smartcard.
- Smartcard:
 - NEVER SHARE YOUR SMARTCARD.
 - Before you can start using your Smartcard, you must first activate it.
 - The activation process involves using SystmOne to associate (or match) your Smartcard with your normal SystmOne user name and to confirm your employment role within your Organisation. ****You only need to carry out the activation process once.
 - YOU are responsible for your Smartcard!
 NOTE: If you lose your Smartcard you must report it immediately to both the Helpdesk on 0345 140 8000 and also inform your line manager.
 - You can identify who your Password & System Administrators are via:
 - Setup>Users & Policies>Staff and Organisation Setup> generally the last 2 Columns on the right, see screen shot below.
 - The **Staff** tab allows you to:
 - View details of the Users in your Organisation.
 - Manage SystmOne user accounts of staff within your Organisation (System Administrators only).
 - Change another user's password and/or re-enable their SystmOne account (Password Administrators only).

Stall Branche	es Archived Stat	f Archived Branc	hes									
R New Staff	👹 Amend Staff	Rechive Staff	€ Change Password	🗱 Disable Logon	🗸 Enable L	ogon 🔀 Remove Smartcard	+ Assign Skill Sets					
Name					Initials	Role V		Last Logged On	Currently Log	Logon Enabled	Smart Card	Password A
SPEED, Helen	(Mrs)					Administrator		12 Jun 2019 16:36		1		1
SPEED, Malcol	m (Dr)					Administrator		20 Jun 2019 13:33		1		
SPEED, Michae	el (Mr)					Administrator		12 Jun 2019 16:44		1		1
SPEED, Patrici	a (Dr)					General Medical Practition	er	12 Jun 2019 16:41		5		
SPEED, Rober	t (Dr)					General Medical Practition	er	12 Jun 2019 16:45		5		
BERRY, Pete (I	VIr)				PB	GP Partner		03 Oct 2018 12:47		1		1
LIST, Task						GP Surgery						
BAKER, Harry (Mr)				harryb	System Administrator		19 Apr 2018 14:38		1		1
BAKER, Holly (Miss)				hollyb	System Administrator		19 Apr 2018 14:32		1		1

- Audit Controls Every time someone accesses Patient information, the system will automatically record who accessed it, when they accessed it and what they did.
- Alerts An alert is raised by the system and then investigated if access to confidential Patient information may have been inappropriate.

How to HIDE Patient Details in SystmOne:

When sharing your screen for remote support purposes or to enable you to take a screen capture without showing patient details, you can **Hide patient identifiers** – this results in the demographic box showing the words **Patient Details Hidden** instead of the patient's full address and DOB, etc.

(The option to hide patient identifiable information <u>does not guarantee that all patient identifiable</u> <u>information will be concealed.</u> Before using this option to demonstrate on a real Patient Record, ensure you privately test all the functionality to be demonstrated to ensure that no breach of patient data confidentiality will take place.)

These are the steps to take:

- Take note of the patient's NHS number.
- Select the **User Menu>** (from the top toolbar).
- Select the User Preferences>Miscellaneous Node.
- Tick the button for **Hide Patient Identifiers** as below:

V User Preferences		×
Enter text to search Search Clear		Demonstration Options
Bookmarked URLs Changes Colours	^	This option to hide patient indentifiable information does not guarantee that all patient identifiable information will be concealed. Before using this option to demonstrate on a real patient record, ensure you privately test all the functionality to be demonstrated to ensure that no breach of patient data confidentiality will take place.
Configured Lists Dates Dispensing Forwarding Recipients		Trial Options Trial Options Options in this panel are trial options only and are not fully supported. If their use causes problems, you should ture there of the second
 ▶ ■ Home Screen ◆ Instant Messaging ▶ Logging On 		Show error validation messages at the bottom of a dialog rather than in a separate dialog NOTE This does not apply to all dialogs.
Miscellaneous Navigation Notifications	÷	Show break down of episodes of care
		Copy from Another User Restore Defaults Qk

• **FIO search** to identify the patient using the correct **NHS number** so only one patient is displayed in results screen (Avoid searching via name as several names could be returned in results), you will only see xxxxxx's for patient details as displayed below:

Y Quick	Patient Search									8	3
Name sear	ch 946 184 6355			Sgarch	History		This Address	Not Foun	d	* Adyanced	
NHS Numb	er First Name A	Middle Names	Surname	DOB	I Hou	se Name	House Road		Postcode	Telephone	
94618463	355 X00000K		X000X	2000000	X X000		XXX XXXXXXX	2000(2000)	2000(2000)	X000000000K	-
L .											

• This will result in the patient demographic box then appearing as below (and addresses within the new journal will appear as XXXs):

Patient Details Hidden								
🖉 👌 d 🖤 💼 🏏 📕 C 🔹 单								

- When in the record, you will see that the <u>Save icon is greyed out</u> so saving the record is disabled while this function is selected.
- Go back to User>User Preferences>Miscellaneous> to remove the tick from Hide **Patient Identifiers** to return to seeing patient details again.
- You will need to re-retrieve the Patient Record to be able to save any data you want to add to the record again.

SystmOne Home Screen Navigation and Using Function Keys:



The SystmOne Title Bar is displayed along the top of the screen:

SystmOne GP: HALL, Chris (Mr) (Trainer) at eMBED Humber Training GP - Home

• This displays the Name of the user logged on, the Unit name and the current page you are on, in this case the Home screen, this changes as you move around the system.

The SystmOne Main Menu is displayed under the Title Bar:

Patient Appointments Reporting Audit Setup Links Dispensing Clinical Tools Workflow User System Help

- Using the Main Menu allows you to navigate to the main functions available on SystmOne, this starts with the Patient Menu and goes through to the Help Menu. Many options are initially greyed out until a Patient Record is opened then they become active.
- Example A below displays the Patient, Clinical Tools & the Help menu options:

	Patient Record Patient Consultation	Ctrl+Shift+W Ctrl+W	cord E	Octails 8	CKS Clinical Topics Map of Medicine	Cti	Launch Help Browser Shift+F1 Show Screen Help F1	٥	Patient Record C Patient Consultation C	Ctrl+Shift+W Ctrl+W	Rec	ord Acute	Repeat	Note	Home	a M
₩ 2	Vaccinations Patient Maintenance	,	1 🖘 🖥	ן דו ק ז	BMI Calculator Weekly Alcohol Intake		FAQs	龍	Repeat Prescribing Vaccinations		*	前 開 谷	• •) 🔳 🔒	11 🖽	۰. £
iiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Print Find Co-habitants Resume Sharing Consent Override	Ctrl+F10 Ctrl+F4		4 0 0a	Smoker Life Expectancy CVD Risk Calculator QRISK2 Calculator FRAX Risk Calculator				Patient Maintenance Print Find Co-habitants) Ctrl+F10	20 20	Patient Registra Patient Details	tion Wizard		Ctrl+D	
	Save Patient Discard Patient	F6 Ctrl+F6			Predicted Peak Flow CHADSVASc / CHADS Warfarin Monitoring Data		Porums Appts	+ ≣	Resume C Save Patient F	Ctrl+F4		Patient Care (IO Record New Ad	S) Idress			
Q Qi	Open Patients Recent Patients Patient Locator Quick Patient Search	Ctrl+R F10		\$ 2	Renal Disease Calculations Body Surface Area Pregnancy Expected Due Date Child Growth Charts Lean Body Mass GPPAQ Physical Activity Index			•	Discard Patient CO Open Patients Recent Patients Patient Locator CO	Ctrl+F6	••••	Change GP Record Sharing Change Dental R Deduction reque	Practice			
					Isabel Diagnosis Tool	F12		9	Quick Patient Search F	10	0	Security Contro Patient Plan	led Procedur	'es	Ctrl+Sł	nift+A
				5	Read Code Browser Drug & Appliance Browser Action Groups Browser		stm .				0 0	New Online Use Online Users	r Account		_	

- Example B above displays the Patient Menu>Patient Maintenance> with additional options.
- You will also notice in the menu options if there is a keyboard short cut to use as an alternative way of getting there, the shortcut is displayed at the end of the option.
- Some options also have an arrow to open up further options in that menu.
- On the Clinical tools menu you can also view **Bookmarks** already available to you.

Bookmarks:

If you need to add, amend or delete a bookmark do one of the following:

• Click on the Bookmark and select Configure at the bottom of the list.

Bookmark URL Amend	Bookmar	Delete Bookmark				
Category	IC.	URL	Bookmark Name	Password		7
No Category	- 6	http://yellowcard.mhra.gov.uk	Yellow Card		*	
Datix		www.bma.org.uk	BMA			1
Ipswich Hospital		www.bnf.org.uk	BNF			
Pathology		www.gmc-uk.org	GMC			
Stallis Archive		www.primis.nhs.uk	PRIMIS			1
TPP		www.searchmedica.co.uk	Search Media			
Web Referral Forms		http://nww.ebs.ncrs.nhs.uk	Choose and Book			
	6	https://www.cas.dh.gov.uk/Home.aspx	Central Alerting System			
	6	http://www.hpa.org.uk	Health Protection Agency			
	6	http://www.library.nhs.uk	NHS Evidence			
	Ţ) www.google.co.uk	Google		-	
7 Cotocorios	1	1 Bookmarks				

- This opens up the **Bookmarked URL's** screen where you can view the actual website address for the appropriate bookmark in the list or make amendments or delete it by selecting a bookmark, **Clicking** on the **Amend Bookmark or Delete Bookmark** button and complete the details as required.
- To Create a new Bookmark, Click on the Bookmark URL button and input the URL address and name and any other details required and then Click OK to save:

URL Bookmark	g and the state of	ж
Optional icon		
Category	· · · · · · · · · · · · · · · · · · ·	New
URL		Test
Name		
Site password		
	Passwords entered here are not used when launching the bookmark. This field is only to serve as a reminder for your password.	
	<u>O</u> k <u>C</u> ancel	

Toolbars:

The toolbars are located at the top of the screen below the Main Menu.



- The buttons in the toolbar allow you to perform common tasks, for example searching for a Patient Record, saving or discarding the currently retrieved Patient Record, issuing an acute prescription etc.
- As you can customise your toolbars, it is possible for everyone's toolbar to look different although configuration may be set by the Organisation so customising may not be possible.
- Some buttons will appear greyed out if no Patient Record is open.
- Hover your mouse over each toolbar button and a description will be displayed to identify what its function is.
- The following list gives a description of some buttons commonly found in SystmOne toolbars:
 - **Search Button -** Use the Quick Patient Search to find a Patient.
 - Task Button Create a new task.
 - **Discard Button -** Closes the current record without saving the changes you've made.
 - Save Button Closes the current record saving the changes you've made to it.
 - **Record Button** Return to the Patient Record view from any screen on the system. Alternatively, you can **Click** on the Patient Demographic Box in the top right - hand corner of the screen.
 - **Details Button -** Record event details for the current consultation/event, for example date, time, location. The background colour of the icon shown on the **Details** button will change to indicate whether you are recording an administrative or a clinically relevant event:

- Blue Indicates that the event is administrative.
- **Green** Indicates that the event is clinically relevant.
- **Next Button -** Saves the Patient Record and allows you to begin a new, separate consultation/event without closing the Patient Record.
- Acute Button Record new Acute medication or an Acute issue.

Configuring Your F8 Home Page:

Organisational settings can be tailored to Organisation preferences and then locked, where this doesn't apply you can configure the home screen **Quick Jump Buttons** (QJB's) to your own choice.

• To Configure **Click** on the **Configure Home Screen** button.



- In the left window pane select **Buttons** under **User Settings**.
- Then in the centre pane, use the search field to search for a subject by name i.e. notifications, quick note, etc. or select from relevant folder if known.
- **Double Click** on an item to move it to the Right-Hand window.
- Position it where you want it within the Right-Hand window using the icons in that window (hover your mouse over the icon to see what it does) add dividers if required.
- When you've finished, **Click** the **OK** button to update your home page.

SystmOne Online Help:

To download the updated Help instructions following an upgrade, press **FI**, a message is displayed, asking if you want to download the update, **Click YES**, a file dialog is displayed showing the progress until complete.

There are 2 options with the SystmOne online help function they are **Shift F1** and **F1**:

• **Option I - Shift & FI** key launches the Help Browser so you can search for help files by using the Contents, Index, Search or Documents tabs as required:



• **Option 2** - The **FI**key opens up the help screen for the page that you're currently working on if help is available.

SystmOne Scrolling Notice Board:

The Notice board displays scrolling messages and information about the current status of SystmOne and is displayed at the bottom left of your screen. They are used by TPP to let all users know about new releases (regular updates and additions to the system), current bugs, bug fixes, urgent news and important server information. They are reset after each SystmOne release, which means any unread notices will move from the **Current Notices** tab to the **Notice Archive** tab see example below:

Patient search	V Notice Board	×
Search F1 help	Current Notices Notice Archive Documents	
2 of 2 new notices View All New Notice	Hide read notices	
📁 [TPP] National Dataset Extracts	Posted By Unread [TPP] National Dataset Extracts 11 Jul 2016 TPP I A TPP will be extracting the data for the annual National Diabetes /	
TPP will be extracting the data for the annual National Diabetes Audit (NDA) 2015-2016 in the	11 Jul 2016 TPP 2015-2016 in the coming weeks.	adar (1077)
coming weeks. Your practice must opt in to provide your data. Onting in can be done by payingting to:	Your practice must opt in to provide your data. Opting in can be d navigating to: Organisation Preferences > DH Submissions and	one by enabling the

- To view **Click** on **View All**, once read, **Click** on the **"Don't show again"** to remove the notice from view and it will be marked as read.
- If you are on the system at the time of the release (approximately every third Thursday evening) you will be prompted to log off SystmOne, wait approximately one minute and then log back on. A short download will then take place then you can continue using SystmOne.

To Do Buttons:

These can only be seen on the homepage, **Clicking** the button shows information in the screen below (known as the 'active space', **Re-Click** to hide).

- If a square appears with a number number outstanding.
- Button's on display are Changes, Notify, Tasks, Forums and Appointments etc. (Notifications and Tasks covered in more detail at the end of this user guide.)



SystmOne Change Notifications:

The Change window is used to list all changes that will be made to the system in the next maintenance release/update.

• **Click** on the **Changes** Button to view system changes as shown:



• Once read, **Click** on the **Don't show again** to remove from the notice from view.

• You can still view all previous **Change notifications** by **Clicking** on the SystmOne Changes... button that will display all old notices.

Print Printer S	Settings Sel	ect Areas o	of Interest		Close				
Show Pending ch	anges (not yet rele	eased)			Appointments				
Changes r	eleased 06 Jun 201	19			Minor Change, EW03, posted 20 Jun 2019 08:57				
Older char	ges				The Appointment Utilisation report will always take textual appoi				
Correction 1	-				Currently, the appointment utilisation report didn't include information				
Search				_	Change not released				
Sort by	Category			Ŧ	Don't show again Comment				
Include Cha	nges for other Svs	tmOne mod	lules and trus	ts					
Only show	Changes with com	ments			GPConnect				
Title		Unread	Total	Г	Minor Change EW47, posted 25, Jun 2019 15:01				
All Changes		20	22		You will be able to book third-party appointments at non-GP organ				
					As of the next maintenance release, you will be able to set your orga				
Interesting Changes					organisation types, not just GPs.				
					Change not released				
Other Changes		20	22		Don't show again Comment				
Appointments		1	2						
Goals		2	2						
Miscellaneous		1	1		Goals				

• The options here are to view Pending Changes, Changes from the recent release, older changes or search etc.

Status Bar:

The Status bar is displayed at the foot of the screen regardless of which screen is currently on show, they display a number of counters (boxes containing statistics) these are Pathology, Document Management, Appointments, Visits, and Tasks, **Double Click** on the number to go straight into that section.

Search features	💌 🔢 o o o o o	15 4	🗳 0 0 0 0	🖲 o o o	1 2 5	🦻 🔒	13:56

• The **Search features entry box** – is a quick way to find and navigate to features within the system, useful if you forget where something is, for e.g. Reports etc.

NOTE: The counters visible are tailored according to the type of organisation you belong to (for example General Practice, Child Health, Out of Hours), therefore use the **FI help** to view details:

Function Key Shortcuts:

	SystmOne Function Keys										- Opens th – Discard	e Patient L s Patient R	ocator ecord
F1	F2	F3	F4		F5	F6	F7	F8		F9	F10	F11	F12
Help	Add to Favourite Screen	Add a Recall	Address Book		Refresh Screen	Save Patient Record	Spell Check	Home Screen		Appt Search	Patient Quick Search	Lock System	Right Click Menu

F9 Appointment Search:

The Appointment Search dialog allows you to search for **Booked** appointment and print out an appointment slip to remind the patient about their appointment. This function is useful if the patient does not know who their appointment was booked with or if they call to check their appointment time.

• **Type** Patients name and **Click** on the search button so results will be displayed.

NOTE: This does NOT take you into the Patients Record it only displays information searched for.

🍸 Ар	pointment Sea	rch			Appointment Search										
Search	ocurrent and fut	ure app	pintments for ron gal		Date of	Birth	•	Search							
Inclu	- Including														
Пн	Historical appointments since 19 Jun 2019 💌														
A 🗆	ppointments ren	notely bo	ooked into other organisations	Textual appointment	s										
Day	Date	Time	Staff Member	Name		Location	Status ≜	Flags	Last Updated	Updated By					
Wed	17 Jul 2019	10:00	HALL, Martin (Mr)	GALE, Ronald	Mr) 07 Jan	eMBED Hu	Did Not At	1	17 Jul 2019 22:50						
Wed	17 Jul 2019	11:30	HALL, Chris (Mr)	GALE, Ronald	Mr) 07 Jan	eMBED Hu	Did Not At		17 Jul 2019 22:50						
Fri	19 Jul 2019	09:40	LING, Helen (Mrs)	GALE, Ronald	Mr) 07 Jan	South Bank	Booked	f I	17 Jul 2019 11:09	LING, Helen					
						oB: 07 Jan 201	4								
					c	ontact: 100 St.	Heliers Road,	Cleethorp	es DN35 7LQ (01478 84	4865)					
З Арр	ointments														
				nformation	Mark As Arrive	d <u>C</u> lose									

To view a Patient's Date of Birth, Address and Preferred Contact Number, hover the mouse over the Patient's name. The details are displayed in the form of a tooltip, if a **Coloured Block** or a **Flag** is displayed in the **Flags** column, hover the mouse over it to view the details (see example in the screen shot above).

- **Click** the **Information** button to print out an appointment slip.
- **Click** the **Mark As Arrived** button to mark the selected patient as Arrived on the Appointments Overview/Appointment Ledger.

F7 Spell Check:

- Remember you can use your **F7** key anywhere within SystmOne to check on the spelling of any data/notes you've created if required.
- The spell checker allows you to ensure that any free text you type on SystmOne has been checked for correct spelling.

Current word	instructione	Ignore
Replace with	instruction	Add to dictionary
	Instruction ^	Edit dictionary
	τ	

NOTE: The Dictionary complements the spell checker function as it allows you to personalise your spell checker so that it works more efficiently. You can add names or words you use frequently that the spell checker does not currently recognise so that it will not pick them up in future.

Effectively Search for and Open a Patient Record:

The Quick Patient Search Dialog:

Do one of the following:

- Press the FIO key on your keyboard. OR
- Click the button in the toolbar at the top of your home screen.
- Select **Patient** in the toolbar at the top of your home screen then select **Quick Patient Search** from the list in the main menu. Then the Quick Search Screen is displayed:

Y Quick Patient Search						×
Name search		Sgarch	History	This Address	Not Found	* Advanced
Include deducted patients	Include test patients	Site All Sites			v	Columns & Settings
Date of birth		Include patien	its only registered for r	emote booking 📃 Search o	n previous surnames	
						-
						-
	Select	Appointment	Consultation	Eavourite Screen	jose	

• The search covers all Patients who are currently registered or have ever been registered at your Organisation.

NOTE: It's essential that you do as many searches as possible to avoid the possibility of creating duplicate records on the system, use Names, Dates of Birth (Exact, During, After or Before options).

- If the **Quick Patient Search** returns too many Patients the **Patient Locator** may help you to narrow down the list see **Using the Patient Locator Search** below.
- **Type** a few letters of the Patient's forename, then type a space and then type a few letters from the Patient's surname, e.g. type "al sam" to view Patients with names like Alice Samuels, Alexander Samson, and Alicia Sampson etc. or use the NHS number if known. (You can type in a few letters of a surname if you're not sure of the spelling for first name).
- Click the Advanced button and select Include Deducted Patient to include Patients who have been registered at your Organisation in the past but no longer have Care provided with you or Test Patient as appropriate.
- **Test Patients** Each Unit has its own Test Patient, should be used to practice getting around the system for new staff or test out new functionality, NEVER use a live Patient Record for to do this.
- Click the Search button and it should return some results.

lame search	conway			Sounds Like" search	Search	History	This Address	Not Found	Advanced
V Include de	ducted patients	Include tes	t patients S	ite All Sites				Columns	& Settings
Date of bi	rth			linclude patients only	registered for i	emote booking	Search on previous s	urnames	
NHS Number	First Name V	Middle Names	Surname	DOB	In House	Name House	Road	Postcode	Telephone
	Brittany		Conway	01 Mar 1967	F	8	Chasehill Road	DN40 3EH	
	Doreen	Susan	Conway	01 Jan 1923	F	457	Dudley Street	DN31 2AB	0800 000 00
	Francis		Conway	01 Jun 1977	F	457	Dudley Street	DN312AB	
			Conway	01 Jan 1966	F	457	Dudley Street	DN31 2AB	0999 999 99
	Grace					457	Dudlov Street	DN31 24B	
	Grace Jack		Conway	01 Jan 1944	M	457	Dudley Street	DINGT ZND	
	Grace Jack Russ		Conway Conway	01 Jan 1944 02 Mar 1956	M	457	Dudley Street	DN31 2AB	

- Only the first 20 Patients/Clients matching your search criteria will be displayed. To view more than 20 results you must use the Patient Locator.
- SystmOne uses the following colour coding on the Quick Patient Search dialog.

NOTE: Click FI help and you will see all the corresponding colours for your GP Unit as shown below:

- **Black -** Permanent GMS patient.
- **Green -** Patient applied for GMS.
- **Red -** Patient is a Walk-In patient, a Temporary Resident (TR) or requires Immediately Necessary Treatment (INT).
- **Blue -** Remotely registered patient (patient registered at another Organisation who has a remote appointment booking at your Organisation).
- Yellow Patient has other registration status, for example private.
- o **Brown** Patient has an incomplete registration.
- Orange Test patient.
- Grey Deducted patient. NOTE: You must have selected the Include Deducted Patients option for deducted patients to be shown in your search results when searching by Patient Name or Date of Birth (when searching by NHS number, Deducted Patients are always displayed, regardless of whether this option has been selected). Also, you must have been granted the 'View Deducted Patients' access right to be able to retrieve deducted patients.
- Once you've found the Patient you're looking for:
 - Click on the Patients name in the results screen and then you can either **Double Click** on it or **Click** on the Select button to retrieve the record.
- If you selected a Deducted Record you will get the following message:



Click on the Yes button to add new data, Click on the No button to view the record without adding new data or **Click** on the **Cancel Retrieve** button as appropriate. If you **Click** on either **YES** or **NO** button you will then get the following Privacy Alert message:

You then need to record the reason you are accessing this deducted record, and then **Click** the **OK** button, this sends this to the Privacy Officer for your Unit to check and validate.

Using the Patient Locator Search:

This allows you to search for a Patient according to a range of criteria related to Name, NHS number, Address, Carer, Registration date/type and Date of Birth. You can search even if you only have limited or partial details. The button functions are the same as for the Quick Patient Search screen.

To view the Patient Locator Screen do one of the following:

- Press Ctrl+R. •
 - OR
- Select **Patient>Patient Locator>** from the Main Menu. •
 - Type in the details you want to use to search for a patient.
 - Click on Search.

			-				-					
Select	<u>Appointment</u>	Consultation	Eavourite Screen	Audit Trail								
-NHS NU	imber				Address					Carer & Registration		
NHS num	ber				House No. Name					Usual		
Old-style	Old-style NHS number			Road					Registered			
-Name-	Name				Locality					Registered	v	
Forenam	e				Postal town				Site	All Sites	•	
Surname			Cu	rent 💌	Postcode					Include Remotely Booked Patients		
Date of k	irth	•			Telephone					🗸 Include Dedu	ucted	
Sex 📃	Sex				Include Previous Addresses				Include Test Patients			
S	earch	History	This Add	ress	Clear	Not	Found	Columns & Settings				

Patient with the Same Address:

- From the search screen results Click on the Patient you want and then Click on the • This Address button and it will then display Patient who live at the same address. OR
- While in a currently retrieved Patient Record Press your Ctrl+F10 key on your keyboard. • OR
- **Click** on **Patient** in the main tool bar, then select ^{Co-habitants…} and it will then display Patient who live at the same address.

NOTE: In both the Quick Patient search and Patient Locator search results screens you may see the following icons displayed in the information column:





T - Test patient.

× - A deducted patient.

Spine Difference Screen:

NOTE: When using your Smartcard you may see a **Spine Difference Screen (PDS)** displayed after retrieving the Patient Record.

- This screen shows any identified differences between what's recorded on SystmOne and on the Spine e.g. SystmOne telephone number is 01472 678945 where the Spine has nothing recorded or SystmOne address has no Post Code, yet Spine address includes the Post Code.
- This screen allows you to **Accept** the changes or to leave as is and **Do Later**, however please remember that if you select **Do Later** and Save the record, this will create a further task.
- If there is a list of differences you can select **Keep Spine Entries** for the telephone number and **Keep SystmOne Entries** for the address or as appropriate.

Y Spine Patient Record Differences		×
GRACIE, Alexi (Ms)	Born 12-Jan-2010 (6y 5m) Gender Female	NHS No. 946 184 6509
Patient Differences		
Keep all SystmOne values		Use all Spine values
7	Telephone	
01472 678945		
Changes will be updated when the patient re	cord is saved.	

Navigate Around the Patient Record:



Patients Home Node:

- Select the Patient Home Node, other messages will be displayed in the main screen such as: Patient Record open elsewhere message, Reminders, Status Alerts, Sensitivities and Allergies, Scan to File, Tasks, Visits etc., by **Click**ing on them it will take you to either that Node or open up an additional window to view the information.
- Any Active tasks will also be visible on the **Patient Home** Node:



Demographic Box - top right of screen:

- Displays the Patients Name, Date of Birth, Age, Gender, Address, Telephone Numbers, NHS Number, Location, etc.
- **Patient Status Alerts/Markers** Are displayed at the bottom of the Demographic box, hover the mouse over each icon to view its description.
- The Patient Demographics Box may have a Red border around it which indicates that more than one Patient Record is open; you can have up to 4 patients records open at any time.
- **To Toggle** between the Patient Records that are open, **Right Click** on the Patient Demographics Box and select the relevant patient or select **Patient>Open Patients** from the Main Menu.
- **Recommended Best Practice** Keep only one Patient Record open at a time so that data can never be entered in the wrong Patient Record.
- **Hover** your mouse over the demographic box and additional details may be displayed such as who the Registered Gp is, Usual Gp, Home/Correspondence address, Telephone numbers, if under the care of any other Organisations.
- If you navigate away from a Patient Record you can **Single Click** the demographic box to return to the Patient Record.

Clinical and Administrative Trees on the left of your screen:

- **Clinical Tree** This tab is displayed by default when you retrieve a Patient Record. You can access all the clinical data saved for a patient via the Nodes displayed on this tab.
- **Administrative Tree** This tab is intended to allow you to view administrative information for a patient via the Nodes available in the tree, including all details entered at the point of registration.
- **The Nodes** Available in both trees are specified in a tree configuration and can be set at Organisation and at a User level (where permitted).
- **The Numbers** In brackets after some of the Nodes indicate the number of current entries contained within that Node.
 - Some of these **Nodes** also contain **Sub-Nodes**, indicated by a \triangleright beside them:
 - To **View** the Sub-Nodes, **Click** the \mathbb{P}
 - To **Hide** the Sub-Nodes, **Click** the
- **Click** on a Node or Sub-Node to see the view that corresponds to it in the Right-Hand pane of the screen.
- There are additional options available on most Nodes, for example to add new details.
- To **View** a list of the options available on a Node, **Right Click** on the Node and select from the list displayed.

To Pin/Unpin (Show/Hide) your Clinical and Administrative Tree:

You can show or hide your Clinical/Administrative Tree so you get a full screen of the dialogue screen

details, to **Unpin/Hide**, **Click** on the *P* above the trees and the trees will be reduced and a **Tab** appears.

When ready to Pin/Show again, slide your mouse over the tab on the left of the screen and Click the above the tree to Pin the tree back on the screen.

Examples of Clinical Tree Nodes:

Journal Types:

The New Journal displays the details that have been added to a Patient Record in date order.



• The Tabbed Journal differs from the New Journal in that data is displayed in date order on different tabs according to where it was entered. This makes it easier to separate out data recorded at your organisation or, for example, at an urgent care organisation.



Tip: To view all the details contained in the patient record, click at the top of the New Journal view or at the top of the Tabbed Journal when viewing the Everything tab.

The Journal main screen is split into 3 areas:

- The **first part** identifies the date, time and initials of the person who recorded the event/data on the record. Hover mouse over initials for full details.
- The second part displays what's been recorded including any read codes etc.
- The **third part** displays various icons which provide further information about an entry, for example privacy setting, whether it is a back dated entry, any sharing details etc.
- If you hover your mouse over each icon a description of what it does is displayed.
- By changing the **Custom Filter** you can view as required, Clinically relevant, Admin events or the Online record (what the patient see's when Online).

Custo	m Filter	-
Custo	m Filter	
Clinic	ally Relevant	
Admin	Events	
Online	Full Clinical R	ecord
Online	Detailed Code	d Record

- **Online Full Clinical Record** Consists of coded entries plus communications, letters and free text from the date requested (at the moment) for your organisation.
- Online Detailed Coded Record Consist of coded entries from the beginning of the record for your organisation.

Communications & Letters Node:

Letters and Communications either created on the system or documents that have been scanned onto the system. Can display All, those that are Incoming or Outgoing by selecting the appropriate tab etc.

Communications & Letters	1				1	- !!		
🗢 📲 🌠 🗮 🖉 🖳 🥬	¥	Dra	ig Word File Here t	o Create Letter		3		
Filter Simple Advanced		▼ 📅				ľ		
All (26) Incoming (1) Outgoing (25) Other 2								
Date ♥ Type 20 Aug 2015 09:24 Clinic Letter	Date Finalised 20 Aug 2015 09:23	Sender Pauline Lee, EDSM GP (Lincolnshire)	Recipient MISS Brittany Conway	Information Letter Temprate. Personalied Care Plan	Flags	4 8 8		
20 Aug 2015 09:27 Document	20 Aug 2015 09:26	Pauline Lee, EDSM GP (Lincolnshire)	Miss Brittany Conway	Letter Template: No antibiotic leaflet1.docx	₩ £			
20 Aug 2015 09:30 Clinic Letter	20 Aug 2015 09:29	Pauline Lee,	Miss Brittany	Letter Template: No	₩Ę	1.		

- To view only your organisations documents Click on the button to the right of the screen.
 OR
- Click on the magnifying glass S to search for specific letter types.

Pathology & Radiology Node:

The Pathology & Radiology view shows a list of the patient's pathology/radiology reports and includes the results under the Coded Investigations on the right of the screen.



Examples of Administrative Tree Nodes:

Patients Details Node:

This Node allows you to be able to update Patient details where there is an icon at the end of the field, **Click** on it and then update accordingly.

Clinical Administrative	Patient Deta	ails			
2 Patient Details	NHS number		Old NHS number		
GP Registration Details	Title	Mr			Amend Name
Record Sharing	News		1		
GMS Care History	Name	Sherlock		Conway	
Address History (1)	Former surname				
🔺 🕗 Appointments, Visits & Tasks	Known as				
Attendance Counts Appointments	Gender	Male			
🕑 Visits	Date of birth	01 Jan 1945 🔻 00:00	Age 71 y		
Tasks	Place of birth	Cleethorpes			
🔊 Scheduled Tasks	Address	457 Dudley Street Grimsby South Humbersid	e DN31 2AB	Residential institute	
👌 Waiting Lists				Record New Address	
Amendments	Home telephone	01472 444444	Work telephone		Record Contact Details
📫 PCTs 🌉 Schools	Alternate tel.		Mobile telephone	0900 000000	
🔆 Misc. Flags (14)	Email			Magazina Send Email	Mail Send Verification Email
Groups & Relationships (2)	Skype ID		Skype Audio Call		
 Hospital Numbers Prescription History (36) 	Contact method	Unknown	Record Contact Method		
A&E and Out of Hours Access	Marital status	Single person (VE0o7)	· it Record h	Aarital Statue	

Appointments/Visits/Tasks Node:

This is where you can view details by selecting each section as appropriate.

Clinical Administrative	Appointments, Vi	sits & Tasl	ks				
Patient Details	Appointment Attendance	Appointment	ts Visits	Tasks	Scheduled Tasks	Workflows	Waiting Lists & Therapy Groups
GP Registration Details	Attendance over the last	twelve months	5				
Address History (1)							
GMS Care History	Appointments	<u> </u>		.			
Record Sharing	Successful attendances	0	0	%			
🛃 Share In Rules	DNAs	1	100	%			
4 🕘 Appointments, Visits & Tasks	Walked out	0	0	%			
🕗 Attendance Counts	Visits	1		·			
Pappointments	viaca						
💽 Visits	Total Attendance						
🖾 Tasks							
🔊 Scheduled Tasks	Appointments	1					
🏘 eWorkflows	Successful attendances	0	0	%			
付 Waiting Lists	DNAs	1	100	%			
🕺 Scheduled Tasks	Walked Out	0	0	• L			
Subject Access Requests	La a		•	~			
🧩 Misc. Flags (3)	Visits	1					
Relationships	L						

Record Sharing Node:

An informed patient, in consultation with a Healthcare Professional, can choose to permit or restrict access to the information entered into their record at each SystmOne organisation that accesses their record. The patient will be asked to give their record sharing consent at each organisation at which they receive care. The patient's consent can be changed at any time.

Start Consultation	Next Event	Event I	Details Path	ology	Drawing	Y Record Sharing	-		е ж. I					×
linical Administ	rative	ø	Record	Shar	ing	CONWAY, Sherloo	ck (Mr)		Borr	9 01-Jan-1	945 (71y)	Gender Male	NHS No.	Unknown
GP Registration	n Details		Sharing Ou	t	-	Organisation	EDSM GP (Lincolnshire)						
Appointments, Appointments, Appointments, Apsintments, Apsintments, Apsintments, Apsintments, Apsintments, Apsintments, Apsintments, Apsintments, Apsintments, Asis	g Visits & Task: e Counts nts	s	Organisation EDSM Com EDSM Com EDSM Com EDSM Com EDSM Com EDSM Com EDSM Com EDSM Com	⊤ munity munity	(Lincoln. (Lincoln. (Lincoln. (Lincoln. (Lincoln. (Lincoln. (Lincoln. (Lincoln. (Lincoln.	Consent period started An informed patient information entered The patient will be a The patient's conse Sharing Out Does the patient co patient? Yes - share data v No - do not share a 	13-Apr-201 t, in consultat d into their rec asked to give and can be cha onsent to the s with other organ	IS ion with a Healt word at each Sys their record sha anged at any tim sharing of data i hisations ded here	hcare Pr stmOne (aring cor ne. recordeo	rofessional, organisation nsent at eac I here with :	can choos n that acce h organisa any other o	se to permit or sses their recc ation at which ti rganisations th	restrict acce rd. ney receive (nat may care	ess to the care.
Amendments	rs sts		EDSM GP (L	incoln	shire)	Consent not asked								
💑 PCTs						Sharing In								
Misc. Flags (14	4) tionships (2)		12 Episodes	s of care		Does the patient co may care for the par	insent to the v tient where th	viewing of data I le patient has a	oy this or greed to	rganisation make the c	that is rec ata sharea	orded at other (able?	are service	s that
Hospital Number Hospital Number Hospital Number History A&E and Out of	ers story (36) of Hours Acce	ss	Organisation EDSM Com EDSM GP (L	√ munity incoln	(Lincoln: shire)	Consent given Consent refused Consent not asked								
Sharing Conse Deleted Items (Identity Verific	nt Overrides (60) ation (2)					Data Source								
~			2 Organisat	ions	_				Qk	<u>C</u> ancel				

• Select the appropriate option for both Sharing in and Sharing out.

Amend Patient Details:

There are various ways to amend details on a Patient Record:

• From the main menu **Patient>Patient Maintenance>** and then select the appropriate Option/Node.

OR

- From the **Administrative tree** in the Patient Record **Select**:
 - **Patient Details Node -** Complete from that screen.
 - Address History Node Where you can amend details on Address, contact details, contact method etc.
 - **Groups & Relationships Node -** To update Relationships, Groups and Family details as appropriate.

NOTE: You cannot amend the patient's **date of birth** from the Patient Details view within the Patient Record, you must retrieve the Patient Record and then use the main menu and select **Patient>Patient Maintenance>Patient Details.**

Patient Details Screen:

NHS number	946 184 6355	Old NHS number			
Title	Mr				Amend Name
Name	Ronald		Gale		
Former surname					
Known as					
Gender	Male 💌				
Date of birth	07 Jan 2014 💌 00:00	Age 5y6m			
Place of birth	Cleethorpes				
Address	100 St. Heliers Road		Residential ins	titute	
	Cleethorpes South Humbe	rside DN35 7LQ	Record N	lew <u>A</u> ddress	
Home telephone	01478 84865	Work teleph	none		Record Contact Details
Alternate tel.		Mobile telep	hone		
Email				Normal Send Email	2 Send Verification Email
Skype ID		Skype Audio Call			
Contact method	Unknown	P Record Contact Me	thod		
Marital status		🔽 💌 Re	cord Marital Status		
Ethnicity	British or mixed British - eth	inic c 🗣 🔽 👧 Re	cord Ethnicity		
Occupation		💥 Re	cord Occupation		
Main language	Main spoken language Eng	llish (👓 🔽 🖧 Re	cord Language		
English speaker	Yes 🔻				

- In the screen above you have various lcons that you can **Click** on to amend details for example:
 - **Click** on the Amend Name button and the following screen is displayed for you to amend details, once completed **Click** the **OK** button to make the change, remember that to commit the changes once all completed you have to **SAVE** the record:

🍸 Amend N	ame	-	_		1.000		×
-Amended N	ame						
Title	Mr	Ŧ					
Name	Ronald			Gale			
Former surna	ime						
Known as							
Name Histo	iry						
Amended	Amended By	Title	Forename	Middle Name	Surname	Former Surname	
		Mr	Ronald		Gale		^
							-
				Ok Cancel			

• **Click** on the **Record New Address** button and the following screen is displayed for you to amend details:

🝸 Add	Iress Type Selection	X
Select th	ne type of address to add	
	Home	
	Home (<u>N</u> o fixed abode)	
	Temporary	
	Correspondence Only	
	Cancel	

• **Click** on the <u>Home</u> button to display the New Home Address dialogue screen where new addresses, previous addresses etc. can be recorded, once completed **Click** the **OK** button to make the change:

		Previous Add	resses Addr	ess Presets	
		-Address Hist	ory		
		🗲 Re-u	se Selected Ad	Idress	Only show addresses recorded at this organisatio
		From V	То	Type	Address
		04 Jan 2003	15 Feb 2018	Home	94 Middlethorpe Road
		45 5+6 2040		Home	Cleethorpes DN35 9QE
F	Find Add Map	15 Feb 2018		Home	Cleethorpes DN35 7LQ
endment Notes					
ddress 💿 This is a pas	st address				
ss in the patient search					
s for correspondence		2 Previous ad	dresses		
		Telephone H	istory		
N/A	•	Re-use S	elected Telepho	ine Number	
01478 84865	Preferred number	From V	То	Use	Number
	Preferred number	15 Feb 2018	10	Home	0147884865
	-				
Unknown					
Unknown					
	endmert Notes endmert Notes ddress This is a pa s in the patient search s for correspondence NA 01478 4865	endmert Notes endmert Notes fins is a past address s in the patient search s for correspondence NA 01478 4865 Preferred number Preferred number	Print Add Map Print Add Map Print Add Map Print Add Map Print a past address s for correspondence NA Preferred number Preferred number Preferred number	Print Add Map Print Ad	Find Add Map Find Ad

- When you select the other options under the **Record New Address details** i.e. Home (No fixed abode), Temporary or Correspondence Only buttons they display appropriate screens to complete and once completed **Click** the **OK** button to make the change.
- **Click** on the Record Contact Details button and the following screen is displayed for you to amend details, you can also select which is the preferred contact number, confirm if the information has been verified or not and add comments to support the verification, once completed **Click** the **OK** button to make the change:

SMS	Consent (Patient consents to receiving all SMS messages)	Organisation default is s	et to
	Dissent (Patient dissents to receiving any SMS messages)	assume dissenc	
Mobile			×
	Unverified	Comments	
	Preferred contact number		
Home	01478 84865		×
	Unverified	Comments	
	✓ Preferred contact number		
Work			×
	Unverified	Comments	
	Preferred contact number		
Alternate			×
	Unverified	Comments	
	Preferred contact number		
Temporary			×
	Unverified	Comments	
	Preferred contact number		
Email			
	Unverified	-	
Skype ID			×
	Email addresses are not valid Skype IDs.	Comments	
	Click here to find out how to locate your Skype ID.		

• **Click** on the *Record Contact Method* button and the following screen is displayed for you to amend details, once completed **Click** the **OK** button to make the change:

Record preferred method of co	mmunication							
This is the default method used to communicate with the patient. If necessary, it will be possible to override this method, if a specific communication method is required.								
Preferred communication method	Unknown v							
	Letter							
	Email	Em						
	SMS No Communication							

NOTE: Remember that to commit the changes once all completed you have to **SAVE** the record.

Reminders:

Reminders allow you to set a message that is displayed on the **Patient Home** view whenever the Patient Record is retrieved. Reminders are also displayed on the Reminders view in the Patient Record.

- To Create a New Reminder:
 - Select the Reminders Node on the clinical tree,
 - **Right Click** and select the **Create Reminder** button and the following screen is displayed ready for you to complete.
 - Once done **Click** the **OK**.
 - OR
 - **OK add another** button:



NOTE: Rules that apply to visibility of reminders are displayed on the screen and can also be found using F1 Help.

Quick Note:

A Quick Note allows you to add text to a Patient Record without having to start a consultation. To use the Quick Note function, you must have a **Quick Note** button to your toolbar or a **Quick Jump Button** (QJB) on your configured home screen.

- To Record a Quick Note:
 - Retrieve the Patient Record.
 - Click on your sin the toolbar
 - **QJB** and the Quick Note dialog is displayed:

uick Not	
Other Det	ails Exact date & time 💌 Fri 19 Jul 2019 💌 14:59 🥰 🗙
Changir	ng the consultation date will affect all other data entered. To avoid this, cancel and press the "Next' button Hide Warning"
104	eave clinical relevance unchanged 🛛 🔘 Make this event clinically relevant 🛛 💿 Make this an admin event
Note	Type 🔍 💌 Text Presets
	Enter your Outlet Note have
	Circol your couck hore here
	Ok Cancel

- Ensure the Date & Time of the event are set appropriately.
- Specify the Clinical Relevance of the quick note.
- Select the Note Type as appropriate and then Type the note.
- Click Ok. The Quick Note text will be visible in the New/Tabbed Journal.

NOTE: There is NO Clinical Coding associated with Quick Notes so you're unable to report on them.

If you often need to type the same text when recording quick notes on Patient Records, you can use **Presets**. This allows you to type in and select standard text (see below for further details on how to create and use presets).

If you subsequently start a consultation, the note will be displayed in the **History** section of a **Guided Consultation**, or the **Consultation Notes** tab of a **Simple Consultation**.

NOTE: Once a consultation has been started, the quick note function will no longer be available.

Using Presets:

If you often need to type in the same text, **Presets** allow you to type in and keep standard phrases to use later and save you time. You can use presets that have been set up by a System Administrator for use by everyone in your organisation or copy presets from another user.

- To Add a standard phrase to the list of presets available:
 - **Click Presets** and the Text Selection dialog is displayed:

Made contact with Patient to inform them that their blood test results are back would like to see them, appointment made for Made contact with Patient to inform them that their Pathology/Radiology result and the Dr would like to see them, appointment made for Presets	Text	Selection						x
2 Made contact with Patient to inform them that their Pathology/Radiology results and the Dr would like to see them, appointment made for 2 Presets	Ma	de contact with Patient to inform ould like to see them, appointme	n them that the ent made for	eir blood test	results are l	back and the Dr	*	4
2 Presets	! Ma ar	de contact with Patient to inform id the Dr would like to see them	n them that the	eir Pathology made for	/Radiology n	esults are back	Ŧ	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	2 Pres	its						

- Click the ± to add, 🖉 to amend and then type the standard text required.
- Click Ok and the text is displayed in the Text Selection dialog.
- Use the **Arrow** toolbar buttons to arrange the phrases into the order you require.
- To **Delete** a preset select it and then **Click** on the \mathbf{X} to remove it.
- Select the phrase you want to use and Click Select to return to the previous dialog.
 OR
- Click Cancel to return to the previous dialog without using a preset phrase.

Saving and Discarding a Patient Record:

When you want to close a Patient Record, you can **Click Save** or **Discard** in the toolbar at the top of your screen:

Save:

• The session and closes the Patient Record.

NOTE: You must have been granted the **Can Save Patient Records** access right to be able to save a Patient Record. See **Marking in Error** below if you save a Patient Record and then realise you've made a mistake.

Discard:

• The button - Close the Patient Record without saving any of the information you have just entered.

Next/Next Event:

9

• If you want to save the information you have entered in this session and start a New/Separate

Quick Note/Consultation without closing the Patient Record, **Click** the **Next** button in the toolbar at the top of your screen (if available) or **Click** the **Next** Event button at the top of the Patient Record view.

NOTE: The **Next** and **Next Event** buttons also allow you to change the date of for example the **New Note/Consultation**, for **Summarising** or entering **Backdated** information without affecting any previous Consultations you have recorded for this patient in this session.

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Event Details:

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• **Click** the Event Details Details icon and it displays the following screen:

Date & Time		Activities	
Exact date & tir	me 🔻 Tue 16 Jul 2019 💌 09:00	Add Delete Amend	
Template Staff	Apply Template New Template	Activity Type With	Durati
Event done by	Known staff member A K HALL, Chris (Mr) Unknown		4
Staff type	🔍 🔮 Trainer 👻		
Authorised by	HALL, Chris (Mr)		
Organisation Other location Comments	Image: Several sector in the sector		
Contact		No activities recorded	
Contact method	Clinically relevant		
	Event is incomplete (can be amended later)		
Link to referral	No linked referral		
Link to team	Update Referral Status End Referral Include ended referrals		
Visibility			
Normal (Part)	of the shared record)		
Private (Not p	art of the shared record)		
Safeguarding	Relevant		
Visible in the	online record		-

- Enter the **Date & Time, Staff, Location, Contact and Visibility**, specific information about an event, for example the date, who carried out the action, where the event took place and who can see details of the event.
- Activities Details of staff activities relating to the current event.
- **Expenses** Details of expenses relating to the current event. (Usually not applicable to GP Units).

If you often need to select the same options in the Event Details dialog, you can set up a template so that the fields are completed at the **Click** of a button.

NOTE: The toolbars and Patient Demographics Box will reappear when you retrieve a Patient Record.

Marking in Error:

If you want to remove an entry from the Patient Record, you can *Mark in Error* the entry. Entries that you mark in error are removed from the main Patient Record and stored in the **Deleted Items Node** of the Administrative tree (this Node is only visible to those users with the **View Deleted Items** access right).

If, however, you want something to be removed from the Patient Record and to be no longer visible to anyone, you can use SystmOne to send a request to a Caldicott Guardian.

NOTE: This option should only be used in exceptional circumstances, for example if a patient could come to harm as a result of an entry still being visible in the record.

Best Practice: If you want to mark a Read code, drug or other individual entry as having been added in error, it is safer to do this from the appropriate Node in the Clinical or Administrative tree and not from the New Journal. This ensures that you do not remove other parts of the associated consultation by mistake, for example consultation notes.

To mark individual items as having been added in error

(Read codes, Repeat templates, Issues, Recalls, etc.):

- Select the appropriate Node from the Clinical or Administrative tree.
- **Right Click** on the entry you want to mark in error.
- Select Mark in Error and the following screen is displayed:



- Confirm that you want to mark the entry as added in error.
- Select the reason why you want to remove the entry.
- Type any explanatory notes, if required.
- **Click** on the **Ok** button.

The details you have marked are removed from the main Patient Record and are now displayed in the Deleted Items Node of the Administrative tree.

If you must mark a New/Tabbed Journal entry as added in error:

- Select the **New/Tabbed Journal** Node from the Clinical tree.
- Click on the $\[b]$ (show all journal entries) in the toolbar. OR
- The **Everything Tab**, if the entry you want to mark in error is not displayed.
- Select the part of the consultation you want to remove. A box is displayed around that part of the consultation.
- Ensure that the box contains **ONLY** the details you want to remove.
- **Right Click** and select **Mark in Error** and continue as above.

Book and Manage Appointments:

Introduction:

This section explains how to manage and book appointments and covers searching for appointments, amending appointments.

Both the **Appointment Overview** and **Appointment Ledger** offer almost the same functions. One of the differences is that the **Ledger** allows you to see Patient Names without having to **zoom in** to a Rota.

For most of the instructions in this guide, you can substitute the **Appointment Ledger** where you are advised to use the **Appointments Overview** Screen.

Filter options on your Appointments Overview/Ledger screens:

AM	PM	Day	Me	Tog
Aug 20	019	- 0) 🗇	
07:30	▼ t	o 20:0	0 🔻	
MT	w	F	s s	K
\bowtie	ÌΧD	$\overline{\mathbf{A}}$	ৰ্ষ্ণ স্ব	
156	58	ຮັງັ	10 11	08:30
12 13	ĭ-14 ∶	15 16	17 18	10m
19 20	21	22 23	24 25	08:40
26 27	28	29 30	31 1	10m
2 3	20.	5 6	7 8	08:50
0 10	20	12 12	1/ 15	10m
10 17		10, 20	24 22	09:00
Book	marks			10m
20010				09:10
		*	വ	10m
Ad	d	Remov	/e	09:20
				TUM
Upda	ate	Renan	ne	09:30
Site				10m
			_	09:40
All Si	tes		Ψ.	10m
V Sł	how ot	her site	s	09:50
01-11				IUm
Stan-			-	10:00
	1 <u>Z</u>	89	1	10m
又 8	83	9		10:10
				10m
	н			10:20
MH	1		_	10m
SH			Ŧ	10:30

- To change the month that is displayed in the calendar, select the appropriate month from the drop-down list.
- **Today** is marked on the calendar by a black border. The currently selected date is marked by a **blue square**.
- To specify the hours that are displayed on the **Appointments** screen, use the drop-down boxes above the calendar (these will already have been set up by the Administrator).
- The parts of the calendar that are crossed out have been archived.
- If you want to view a particular day or days that have been archived, select the days you want to view in the calendar and **Click History**.
- It's also possible to view the appointments calendar for over a year ago (Appointments Overview or Ledger/Select **Earlier** from date drop-down list at top left/Select Year and Month to view/**OK**/the calendar on the left shows the selected month).
- To select more than one day within the calendar, **Click and Drag** the mouse over the days you want to view or hold down the **Ctrl key** and **Click** the mouse to select individual days.

NOTE: Bank holidays and closed days are indicated on the calendar by a **green** square. (to see the details - hover over the date with your mouse).

- Members of staff can also be selected. Tick the appropriate member(s) of staff from the list in the bottom left of the screen and their Rota's will be displayed.
- The buttons above the Rota screen filter the Users view. And the function of each button is detailed below:
 - **AM –** Restrict the view displayed to the morning only.
 - **PM** Restrict the view displayed to the afternoon only.
 - **Day –** Display the whole day.
 - **Me –** Show only my Rota's.
 - Toggle Toggle between grouping multiple columns by day or by staff member when you have selected more than one day from the calendar (to view Rota's for more than one day, Click on the day in the calendar and drag the mouse over the other days you want to select).

NOTE: If you use this button, the settings are saved when you exit SystmOne and are used the next time you **Click** the **Toggle** button on the Appointments Overview screen.

Slot Types:

- **Slot** A standard Appointment Slot that can be booked in advance.
- **Telephone Appointment Slot** A slot reserved for telephone appointments. Appointments booked into this slot are automatically marked with the **Telephone Appointment** flag. Empty telephone slots are coloured **pale blue/purple** on the Rota.
- Embargoed Slot A Slot that cannot be booked until the Rota date is reached or until a specified number of days before the Rota date. Empty embargoed slots change colour when they expire. NOTE: Specific Access rights required for Embargoed/Blocked Slots.
- Blocked Slot A slot that cannot be booked. You may want to block slots in a Rota in order to reserve time for administration tasks, tea breaks, etc.
 NOTE: Only users who have been added to the Can block appointments list by a System Administrator can block appointment slots.

Making a Booking from the Appointments Overview/Appointment Ledger:

To Book an Appointment for a Patient:

- Do one of the following:
 - Select Appointments>Appointments Overview from the Main Menu, select the appropriate date and Double Click on the required Rota. The Rota View screen is displayed.
 - OR
 - Select **Appointments>Appointment Ledger** from the Main Menu, select the appropriate date and navigate to the Rota to which you want to book the appointment.

AM PM Day Me	Toggi	le History	Appointment	Search	Free Slot Search	Settings	3	Print Rotas/Labels Re	fresh	Maximise Minimise Past Rote	as	
Jul 2019 💌 🕘 🖨		Tawnie			SC			BH		Chris H		КН
07:30 × to 20:00 ×		(Today) Tue 1	16 Jul		(Today) Tue 16 Jul			(Today) Tue 16 Jul		(Today) Tue 16 Jul		(Today) Tue 16 Jul
MTWTFSS	08:20 10m	Same Day Emi	bargo	08:20 S 10m	Slot	08:5 10m	i0 S	Slot	08:5 10m	Slot	08:50 10m	Slot
4 4 10 X X 13 14	08:30 10m	Same Day Emi	bargo	08:30 S	Slot	09:0 10m	0	Slot	09:0 10m	Slot	09:00 10m	Slot
15 16 17 18 19 20 21 22 23 24 25 26 27 28	08:40 10m	1 Day Embarg	0	08:40 S 10m	Slot	09:1 10m	0 5	Slot	09:1 10m	Slot	09:10 10m	Slot
29 30 31 1 2 3 4 5 6 7 8 9 10 11	08:50 10m	1 Day Embarg	0	08:50 S	Slot	09:2 10m	0	Slot	09:2 10m	9 Slot	09:20 10m	Slot
12 13 14 15 16 17 18	09:00 10m	Slot		09:00 S	Slot	09:3 10m	0	Slot	09:3 10m	9 Slot	09:30 10m	Slot
Bookmarks	09:10 10m	Slot		09:10 S 10m	Slot	09:4 10m	0	Slot	09:4 10 m	Slot	09:40 10 m	Slot
Add Remove	09:20 10 m	Slot		09:20 S 10m	Slot	09:5 30 m	i0 5	Slot	09:5 10 m	Slot	09:50 10 m	Slot

- Do one of the following:
 - Right Click on an appropriate empty slot type and select Book Appointment, OR
 - Select an appropriate empty slot type and press Enter.
 - Type the patient name in the Name search field on the Appointments Patient Search dialog and Click Search.
 - Select the patient's name from the list displayed and **Click Ok**.
- If any reminders have been set on the patient, they will normally be displayed now.
 - Check the **Reminders** and **Click Close**, which then displays **Book New Appointment** dialog:



NOTE: A panel is displayed on the Right-Hand side of the **Book New Appointment** dialog. Any Reminders are displayed, together with details of any other booked visits and/or appointments and any **QOF** alerts triggered.

- Appointment Tab Check Date, Time, Duration, Staff, Patient default through.
 - Check the **Duration** field, which shows the duration of the selected slot in the Rota:
 - If the patient expects to need more than one slot, select the appropriate entry from the drop-down list.
 - If the patient only needs to see the clinician briefly, select Half-5 mins from the drop-down list. This will leave half of the slot available for you to book in another patient if required.
 - **Purpose -** Select from drop down list if appropriate.

- **Details -** Record any details you require, reason for appointment etc.
- Alternatively Click on the Template Button and a list of templates will be displayed that your Organisation has created:



- **Double Click** on the appropriate **Appointment Template** and any details relating to that template will be entered into the appropriate fields.
- Flags Select any flags you want to attach to the appointment from the list provided.
- Tick either **Print Appointment letter/label** or **Print Appointment letter using Integrated Word** as appropriate.
- Attendance button View attendance over the last 12 months.
- **Mobile/SMS button** Preferred contact method, SMS consent/dissent, Mobile/Home phone numbers, Email address etc.
- All recordings can be recorded as **unverified/verified** and or send **verification SMS message** if set up.
 - **Presets button -** Allow you to type in and keep standard phrases to use later and save you time, these can be copied from other users or set up by the Organisation.
 - **Recurring button -** If you want the text you typed in the **Details** field to appear every time an appointment is booked for this patient in future. This button also allows you to amend or clear existing text.
- **Recurrence Tab** If having regular appointments e.g. for wound dressing (Same Rota Templates must be applied with same named Clinician if not this functionality won't work).
- Attendees Tab To record if someone was present i.e. relative or additional staff member.
- Click OK at the bottom of the Book New Appointment dialog screen to Save and confirm the booking.

Book an Appointment using the Free Slot search:

The Free Slot search dialog allows you to search for an appointment that suits the patient using a combination of search criteria to speed up finding appropriate appointments.

- Select Appointments>Free Slot Search OR
- **Ctrl+F9** and the following screen is displayed:

Stati Pierr HALL, Chris (M) HALL, Kevin (M) HALL, Kavin (M) HALL, Martin (M) HALL, Staat (M) HALL, Staat (M) HALL, Stat	Chris H KH MKH MH SH II TH MH PJ PJ V	Monday Monday Tuesday Wednesday Wednesday Thursday Friday Saturday Saturday Sunday	Date & Itime Searching from 22 Aug Search the next 2 : Including slots All Day Aut P Duration Minimum duration	2019 V Days V 12:14 M Day	Hota type Hiller Mathe Natal Clinic Asthma Clinic Clinic Clinic Matheves Clinic Matheves Nurse Clinic Matheves Nurse Clinic Session			Slot Type Fin Blocked COPD Fembargo NMP Lunchladr NHS111 NHS11 NH	er nin bitended i Annointr	Access		
Bookmarks	×	Site eMBED Humbe	r Training GP	¥								
Raff Member	Rota Type	5	Rota Name		Slot	Slot Colour	Day	Earliest Date	Days	Duration	Total Free	
ALL Kevin (Mr)	Session	K	evin Hall OP Clinic AM		Slot		Fri	23 Aug 2019 08:50	4	10		19
ALL, Marian (Mrs)	Session	N	Iarian H GP Clinic PM		Slot		Thu	22 Aug 2019 13:20	Ó	10		19
ALL, Marian (Mrs)	Session	N	Iarian H GP Clinic PM		Slot		Fri	23 Aug 2019 13:20	1	10		19
ALL, Martin (Mr)	Session	N	Iartin Hall GP Clinic AM		Slot		Fri	23 Aug 2019 08:50	1	10		19
ALL, Tony (Mr)	Session	т	ony H GP Clinic AM		Slot		Fri	23 Aug 2019 08:50	1	10		19
ALL, Stuart (Mr)	Session	C	Ir Stuart Hall GP Clinic PM		Slot		Thu	22 Aug 2019 13:00	0	10		22
ALL, Stuart (Mr)	Session	C	Ir Stuart Hall GP Clinic PM		Slot		Fri	23 Aug 2019 13:00	1	10		22
19 Slots found Other Options		-			••••		-					

- Select the appropriate details in the top half of the screen you want to view for, such as staff member, days, rota type, slot types, sites etc.
- If the patient requires more than one appointment to be booked at this time, use the **Link to appointment** fields under 'Other Options' to specify the time interval that should elapse before the patient's next booked appointment and **Click Link**.
- Select the Slot you require from the list displayed and **Click** the appropriate button at the foot of the dialog:
 - **Book** Search for the patient on the system and book the slot.
 - **Zoom to Rota -** View the free slot on the Appointments Rota View screen. You can then proceed to book it as normal if required.

NOTE: The list of free slots displayed shows the first free slot of each type from each Rota, i.e. if a Rota includes telephone appointment slots and regular slots, the first free telephone slot is shown and also the first free regular slot.

- Check the Total Free Slots column in the list of free slots to find out how many of that type of slot are available within the same Rota.
- Past Appointment Slots and Reserved Slots are NOT included in the search results.
- A Slot is 'Reserved' for four minutes as soon as it is selected by a user ready for booking and the reservation remains in force until:
 - The four minutes elapse.
 - OR
 - The slot is booked. OR
 - The appointment is cancelled.

Options available to use from Right Clicking on a Result in the lower half of the Free Slot Search dialog:

Staff Member	Rota Typ 🟶	Book Appointment		Slot	Slot Colour	Day	Earliest Date	Days	Duration	Total Free V	
HALL, Kevin (Mr)	Sessior 🔠	Book from Waiting List	GP Clinic AM	Slot		Fri	23 Aug 2019 08:50	1	10	19	*
HALL, Marian (Mrs)	Sessior 💥	Book Remote Appointment	P Clinic PM	Slot		Thu	22 Aug 2019 13:20	0	10	19	
HALL, Marian (Mrs)	Session		P Clinic PM	Slot		Fri	23 Aug 2019 13:20	1	10	19	
HALL, Martin (Mr)	Session 101	Book Textual Appointment	GP Clinic AM	Slot		Fri	23 Aug 2019 08:50	1	10	19	
HALL, Tony (Mr)	Sessior 😽	Rebook Appointment	Clinic AM	Slot		Fri	23 Aug 2019 08:50	1	10	19	
HALL, Stuart (Mr)	Session		all GP Clinic PM	Slot		Thu	22 Aug 2019 13:00	0	10	22	-
HALL, Stuart (Mr)	Sessior 🤤	Block Appointment	all GP Clinic PM	Slot		Fri	23 Aug 2019 13:00	1	10	22	-
29 Slots found	7	Amend Slot				-					
Other Options	A	Zoom to Rota									
Link to appointment U . Days	Unk Ø	Amend Rota									_
		Tohla 🕨	Book Zoom t	o Rota Refresh <u>C</u> lo	ise						

- **Right Click** to book a slot and find a patient.
- If the earliest slot is acceptable then continue to book appointment.
 OR
- Click Zoom to Rota to find appropriate time slot.
- **Double Click** into the slot.

OR

• **Right Click** and select **Book Appointment** to search for the patient and book the appointment.

Selected Appointment Slot - Right Click options:

Right **Click**ing on the appointment slot gives you the following options such as:

• View Appointment History, Marking as arrived, Call from Reception, (Flags, SMS, Print and Administration have additional options) View Record, Amend, Move etc:



To Delete an Appointment:

- Right Click on the slot you want to Delete and select Administration>Delete>
- Click YES to confirm that you want to delete the appointment.
 NOTE: You should only delete an appointment if it was booked in error; otherwise, select an alternative reason from the Administration sub-menu, for example Cancelled by Patient.

To Cancel an Individual Appointment:

- **Right Click** on the slot you want to **Cancel** and select the appropriate option from the **Administration** sub-menu, for example **Cancelled by Unit**.
- When you cancel an individual appointment, you will be asked by the system what you want to do with the appointment:



- Rebook Now Details of the original appointment are displayed in a small window at the foot of your screen as a reminder. Navigate to a suitable appointment slot on the Appointments Overview in the usual way, Right Click on the slot and select Book Appointment.
- **Rebook Later -** The appointment is stored in the **Appointments for Rebooking dialog**, ready for rebooking.
- **Don't Rebook -** The original appointment is cancelled and is not stored for rebooking.

Using the Appointments for Rebooking Dialog:

• To view the Appointments for Rebooking dialog, select **Appointments>Appointments for Rebooking** from the Main Menu.

To Rebook an Appointment from the Appointments for Rebooking dialog:

- Select the cancelled appointment you want to rebook from the list.
- **Click Rebook**. A small window is displayed towards the foot of the SystmOne screen to remind you of the details of the original appointment.
- Do one of the following:
 - Click Cancel Rebooking at the foot of the small window to postpone rebooking. The appointment remains in the rebooking list.
 OR
 - **Right Click** on a new appointment slot in a Rota on the Appointments Overview and select **Book Appointment**. The new appointment is booked with the same details as the cancelled appointment.

To Rebook an Appointment from the Appointments Overview:

- Select **Appointments>Appointments Overview** from the Main Menu.
- **Double Click** on the Rota into which you want to rebook the appointment to view the Appointments Rota View screen.
- Right Click on an empty slot and select Rebook appointment.
- Select the appropriate patient from the Appointments for Rebooking dialog.
- **Click Rebook** and the appointment will be displayed in **bold type** on the Appointments Overview for **60 seconds after booking** to make it easy for you to see appointments you have just booked. It will not show in bold on other users screens.

Appointments stored for rebooking remain listed on the Appointments for Rebooking dialog until rebooked or deleted. Deleting an appointment from the Appointments for Rebooking dialog will remove it from the Appointments for Rebooking list but will not delete the original appointment.

NOTE: To delete an appointment from the Appointments for Rebooking dialog:

- **Right Click** on the appointment and select **Delete**.
- To View the record of the corresponding patient, **Right Click** and select **Retrieve Patient**.

If there are a lot of entries in the Appointments for Rebooking dialog, you can sort them by **Clicking** on the column headings, for example if you **Click** on the **Clinician** column heading, you can group the entries by the name of the clinician who owned the original appointment.

Create and Assign a Visit:

Recording a New Visit Request via Appointments>Visits>:



Toolbar Buttons Available on the Visits Screen:

New Visit	Create a new visit request. See below:
New Textual Visit	Create a textual visit request (for patients not registered on SystmOne). See below:
Refresh	Update the details displayed on the Visits screen with the latest changes. Alternatively, press F5 .
Print Lists	Print a list of the visit requests currently displayed on the Visits screen and also a patient summary sheet for each of the relevant patients. The details shown on the summary sheet depend on the view that has been selected from the 'Record Summaries' Node of the User Preferences tree
Settings	 Allows a System Administrator to: specify whether users should be prompted to create a follow up visit when marking a visit as 'Finished' or saving a consultation that was started from a visit create a list of staff members who can be assigned visits.
All Staff	Include all staff members in the Visits Grid. Note: A cell in the grid is shaded bright <i>pink</i> if a staff member is on leave on that day.
Me	Show only yourself in the Visits Grid (the column containing your visits is highlighted in pale green). Note: A cell in the grid is shaded bright <i>pink</i> if a staff member is on leave on that day.
A- J, K-S, T-Z	Click the appropriate button to include in the Visits Grid only those staff whose surnames begin with the relevant letters. Note: A cell in the grid is shaded bright <i>pink</i> if a staff member is on leave on that day.
Q	Only show staff members associated with the specified caseload/team in the Visits Grid. Click to clear the selection. Tip: To associate a staff member with a particular caseload, select the 'Configure Caseloads' Node from the foot of the tree that pops up when you Click .
Show past visits	Include details of past visits in the Visits Grid.

To Record a New Visit Request:

- Click New Visit on the Visits screen.
- Search for the patient who requires the visit and **Click OK**. The Record Visit Request dialog is displayed.



• Specify the date the visit request was made.

- Select the staff member requested by the patient from the **Staff** requested drop-down list if appropriate.
- **Click Attendance** if you want to view the patient's attendance record. (Any other pending appointments or visit requests for this patient are listed in the box under the Request status field).
- Type notes in the **Comments** field. **Click Presets** to enter commonly used phrases, or to add new Presets. Up to **600 characters** can be entered in this field.
- Specify the **Clinician** who has been assigned the visit. If you leave the **Clinician** assigned field blank, the visit request will be included in the **Unassigned** column of the Visits Grid.
- Click OK.
- The visit request is added to the **Visits** screen.

To Record a Textual Visit Request:

- Click New Textual Visit. The Record Visit Request dialog is displayed.
- Specify the date the visit request was made.
- Select the staff member requested by the patient from the Staff requested drop-down list.
- Type any notes in the **Comments** field.
- Specify the **Clinician** who has been assigned the visit. If you leave the **Clinician** assigned field blank, the visit request will be included in the **Unassigned** column of the Visits Grid for today.
- Click OK.
- The visit request is added to the Visits screen.

Printing Record Summaries for Multiple Patients:

- Specify the **Clinician** you want to print **Patient Summaries** for,
- Click on the to select All Patients,
- Click on the to open the Actions list and select Print Record Summaries,
- Select **Home Visits** view from the list then **Click Print** this will then open up the list in Microsoft Word ready for you to **Print from Word**.

Issue a Repeat prescription:

Using the Repeat Prescribing Screen

This screen has been designed for use by members of staff who issue large numbers of repeat prescriptions.

NOTE: - You must have the 'Repeat Prescriber' access right to be able to issue repeat templates or one of the other prescriber access rights, for example 'Independent Prescriber'. If you are a repeat prescriber and need to restart/reauthorise repeat templates, you will also need the 'Repeat Reauthoriser' access right.

To view the Repeat Prescribing screen, retrieve a Patient Record and select **Patient>Repeat Prescribing** from the Main Menu:

Euture Issues	Undo Issues Patient Request Refuse Request Repeat Dispense Settings Refresh		🖉 🔹 💕 💘 🗸) 🔜 🗎 🗎		
Last medication review	v recorded on 17/Feb/2015 by Tcdelegate2 Tc (SystmOne Administrator). Next due on 17/Feb/2016.	Record medication	review Read code (XaF8d)			
Authorised v Issued	Drug	Last Issued	Review Date Issues Left	Issues	Ratio Flags	1
13/Feb/2015	Bisoprolol 2.5mg tablets	13/Feb/2015	13/Nov/2015 8	1 / 9 (1) -		- 3
13/Feb/2015	Ramipril 1.25mg capsules	18/Feb/2015	13/Nov/2015 7	2 / 9 (2)		1
17/Feb/2015	Paracetamol 500mg capsules	18/Feb/2015	17/Nov/2015 7	2/9(2) -	y	6
17/Feb/2015	Salbutamol 100micrograms/dose inhaler CFC free	18/Feb/2015	17/Nov/2015 7	2 / 9 (2)	_	2
18/Feb/2015	Ibuprofen 400mg capsules	Never	18/Nov/2015 9	0/9(0)	- Ö	-
18/Feb/2015	Phenoxymethylpenicillin 250mg tablets	Never	18/Nov/2015 9	0 / 9 (0)		

Drugs displayed within Repeat Templates (Current Repeats) window can be filtered using the View drop down list. Once filtered the screen name will include the view e.g. Repeat Templates (All Repeats).

Alternatively, you can set the Repeat Prescribing screen as your Favourite Screen (F2 key) so that it is automatically displayed when you retrieve a patient

For a description of the icons displayed in the **Flags** column, hover the mouse over the icons.

The coloured blocks displayed in the **Ratio** column are similar to those used in the **Compliance** column on the Repeat Templates view, hover the mouse over the line to view the details.

The entries on the Repeat Prescribing screen may be colour coded in the following way:

- Black Repeat prescription
- Green The issue of this repeat cannot be initiated by the patient
- Blue/Purple Irregularly issued repeat template

The text displayed in the yellow bar at the top of the screen shows when the last medication review was performed, the name of the person who performed it and when the next medication review is due.

To sort the entries listed on the Repeat Prescribing screen, **Click** the appropriate column heading, for example to sort the entries by authorisation date, **Click** the **Authorised** column heading.

Use your FI Online Help screen to see available options on:

- Options available on the Repeat Prescribing screen.
- Options available at the foot of the Repeat Prescribing screen.
- Options available if you **Right Click** on an entry on the Repeat Prescribing screen.

To Set the Repeat Prescribing Screen as Your Favourite Screen:

- To do this:
 - Select User>Favourite Screens> from the Main Menu or press F2 on your keyboard.
 - **Click Configure**. The Configure Favourites dialog is displayed.
 - Type **Repeat Prescribing** into the **Search** field and **Click Search** or press **Enter**.
 - **Double Click** on the search result in the tree to move it to the Right-Hand pane or select

the item and **Click** the

- If there is more than one entry in the list, **Click** to move the Repeat Prescribing screen to the top of the list so that it becomes your first option.
- Click OK then Click Close to exit from the Favourite Screens dialog.

When you next search for a patient:

- Select the patient from the list in the **Quick Patient Search** dialog or the **Patient Locator**.
- Click Favourite Screen. You are taken directly to the Repeat Prescribing screen.

Issuing a Script:

- To issue a script from the Repeat Prescribing screen, do one of the following:
 - **Right Click** on the drug and select **Issue**. **OR**
 - Select the drug and **Click** the **Issue** button.

An asterisk is displayed next to the drug name and an icon \mathbf{M} to the right.

- To issue more than one repeat script at the same time, do one of the following and **Click Issue**:
 - Hold down the Ctrl key and Click the mouse on each of the scripts you want to issue.
 OR
 - Hold down the **Shift** key and **Click** the mouse on the first and last scripts in a range on the list.

OR

• Press **Ctrl+A** to select all the scripts listed.

Printing a Script:

- To print out scripts for drugs listed on the Repeat Prescribing screen that have been issued:
- Do one of the following:
 - Click the
 OR

- Save the Patient Record.
- Click Print Them Now.
- Click OK.

If you need to go into the rest of the Patient Record:

- Click in the demographics box. OR
- Click the Record Button.
- To return to repeat prescribing screen **Click** the **Repeat prescribing button**.
- You can also amend from the **Right Click** menu.

Marking a Printed Prescription as Collected:

Recommended for Best Practice.

- Retrieve the Patient Record then select the **Prescription History** Node from the Administrative tree and do one of the following:
 - **Right Click** on the relevant entry in the list and select **Prescription Collected**. **OR**
 - Select the script you want to mark as **Collected** and **Click** at the top of the Prescription History view as appropriate.
- Select the appropriate option from the **Collected By** list, for example **Self, Courier, Post etc.**
- Type any additional information in the **Comments** field and **Click OK**.
- These details are displayed under **Collected** in the **Selected Prescription Details** pane.

Marking a Printed Prescription as Not Collected/Destroyed:

Recommended for Best Practice.

- Retrieve the Patient Record then select the **Prescription History** Node from the Administrative tree and do one of the following:
 - Right Click on the relevant entry in the list and select Prescription Not Collected/Destroyed.
 OR
 - Select the relevant script and **Click** at the top of the Prescription History view, as appropriate
- Type an explanation in the **Reason** field and **Click OK**. This is displayed under **Destroyed** in the **Selected Prescription Details** pane.

The entry in the New Journal that shows when the script was originally printed is changed to show the script was Not Collected/Destroyed.

To jump to that entry, **Right Click** on the relevant line on the Prescription History view and select **Show Journal Entry**.

If there is an associated pending dispensing job, it will be automatically cancelled.

Utilise Communications within SystmOne:

There are 3 methods of communicating with colleagues or other users who access SystmOne, these are Tasks, Notifications and Instant Messaging.

Tasks:

Tasks are the most important communication method for **2 main reasons**:

- They can be linked to a Patient Record and therefore are part of the clinical record.
- As well as being produced by a user they can be produced automatically by SystmOne as part of a process and therefore need to be **actioned** by a user.

• There is **no privacy** in tasks and all tasks for all users can be seen and dealt with in the **Task List Window.**

IMPORTANT NOTE! Each unit or Practice deals with tasks in a different way so it is essential you discuss tasks with your manager and understand what you are responsible for within your unit.

- Tasks are messages users can send to each other as a way of recording work that needs doing. As such, they are useful in organising and managing workloads.
- Some Tasks are generated automatically by SystmOne, such as **Electronic Referral Received**, or **Registered GP Changed.**
- By keeping track of your Tasks, you can really keep on top of what's happening in your organisation and to your Patients.
- Tasks relating to a specific Patient also form part of the Patient Record.
- They can be found in 2 areas on the record when a record is retrieved.
 - Active/ Incomplete tasks can be seen and dealt with from the **Patient Home** Node on the Clinical Tree as long as your user preferences allow that.
 - Completed tasks can be viewed on the **Appointments Visits and Tasks** Node which is found on the Administrative tree.

What do the Task Types Mean?

There are 2 Main ways of creating tasks, those created automatically by Systmone as part of a Process or those created by an Individual User.

Automatic or Process Generated Tasks:

Some Task Types have been created by SystmOne and are not amendable by users. The names given to these Task Types are straightforward, i.e. **Patient Accessed, Shared Care Granted, EDI Translation Error**. There are many different types of process tasks and these generally must be **Actioned** before they can be completed. Actioning a task moves it further through the automated process until the process and Task has been completed.

User Generated Tasks:

Organisations may also create their own Task Types. The names given to these Task Types depend on the organisation. The default task type for user generated tasks is **Miscellaneous**. These can also be generated by an individual User see next section.

How do I access my Tasks?

• Left Click on the Tasks button on your home screen: -

25 2 Changes Notify Tasks	2 prums Appts Vi	a Its Path Scan	
Make this view the default			т 🖹
Assigned to Me	Count	Unassigned	Cour
Overdue		Overdue	
Due Today		Due Today	
Due Tomorrow		Due Tomorrow	
Referrals	2	Miscellaneous	1
Total	2	New Patient Record Check	2
		Repeat Drug Replacement	1
		Rota Auto-Apply Results	4
		Total	8

Your own Tasks appear under the Assigned to me heading:

In the example above this staff member has 2 current tasks to deal with, none of them Overdue, Due Today or Tomorrow.

In addition, in this example, there are 8 **Unassigned Tasks** (Tasks to be completed by anyone within the organisation).

- **Double Click** on a folder to see and process the tasks within that folder.
- To Select a task from the list, and read its content, **Left Click** on the task. The task content can be viewed in the bottom pane.
- **Right Click** on each task to see the list of processing options.

								_		
Make this view	w the default							1	🖞 Task	List
Back to Br	reakdown									
Updated Pa	atient					Status	Due Date 🔻	Started	Flags	
22 Jun 2016					1	Not Started			80	
23 Jun 2016		Ē	Action			Not Started			71	
		ab]	Update							
		2	Retrieve Patient							
			Change Status	۲						
		?	Assign	۲						-
2 Tasks		٣	Set Flag	۲						
Wed 22 Jun 12	:51 - Sent automatically by Sy	Ŷ	Print Task		l for a nation to	ninterned been				
Another unit has	s overnaden patient consent to		Create Rule		a for a patient re	gistered here.				
This Task is to Overrides repor	inform you of this action, advisi rt to ensure that it was performe		Table	F	aldicott guardia	n access right s	should use the	e Patient	Conse	nt
You should nor Organisation Pi	minate a specific person to rece references dialog.	eive tl	nis Task in the f	utu	re using the Clin	ical Policy->Shi	aring (Enhanc	ed) page	e of the	

• To return to the folder list select **Back to Breakdown** Button.

How do I know I have a New Task?

The number on your Task button on the Home screen will have increased. When a new Task arrives for you, a clipboard icon is automatically shown in the system tray area at the bottom right of your SystmOne screen (next to the clock).



- You can also select for a dialog to appear each time a new Task arrives.
- **Click** the **Settings** button on the Task List screen.
- Select the **Sending & Receiving Node** of the tree and tick the **When a Task is assigned or created for me, show a dialog**. Then **Click OK**.

Managing Tasks via the Task List Window:

The task list allows you to Monitor and deal with all tasks within the unit or practice.

• Click on the blue Task button on the Home Screen and select the Task List button.



• Alternatively: Select Workflow>Task List from the Main Menu or Ctrl+T on the keyboard.

The Task List screen is split into three sections:

All Tasks Summary Mr Chris Hall					
4 📔 All Tasks	🔲 🔒 🖉 🛶 🖏 🖲 🗇	∓ 🌾 ∓ 谢 🚳	- ×		
All Open Tasks (168)	Lindated V By For	Patient	Task	Status Due Date	Started Flags
Unassigned Tasks (29)	05 Feb 2015	Mr Tommy Test-TestPatient	SystmOnline Que N	lot Started	
Assigned to Groups (6)	10 Mar 2015	Mr Tommy Test-TestPatient	SystmOnline Que N	lot Started	- C 🖓 🗖
Assigned to Staff (133)	27 Oct 2015 EE BB		Miscellaneous N	lot Started	
By Status (168)	11 Nov 2015 LG	Mr Frank Connolly	New patient addreN	lot Started	2
Tasks from Elsewhere (95)	13 Nov 2015 LG	Mr John Hallo	Patient Deceased N	lot Started	
A Elters	04 Dec 2015 Lynn Lynn Baker	Mrs Elizabeth Thompson	NHS Mail Messar N	lot Started	Hè
4 Eur Ma (6)	14 Dec 2015 SR	Mr Tony Test-TestPatient	Electronic Referra N	lot Started	
Batele Benert Besuite (2)	14 Dec 2015 LG	Mr Frank Connolly	New patient addreN	lot Started	- E 😤 🗌
Dater Report Results (3)	16 Dec 2015 DD DD		Miscellaneous N	lot Started 16 Dec 2015	
 Consent Override Alert (2) 	16 Dec 2015 CH DD		Miscellaneous N	lot Started 17 Dec 2015	
 Miscellaneous (1) 	17 Dec 2015 SR	Mr Tommy Test-TestPatient	Electronic Referra N	lot Started	
For Only Me (6)	18 Dec 2015	Mrs Elizabeth Thompson	Online Services P N	lot Started	- H & 1
Due Today	14.lan 2016 DD DD	Mis Enzabell mompson	Miscellaneous N	lot Started 15 Jan 2016	
Due Tomorrow	168 Tasks				
Overdue (1)	Thu 05 Eeb 16:20 Sent automatica	lk hv SvetmOne			
Created By Me (2)	The questionnaire Patient Satisfacti	nn Survey' was completed online			
🖉 Current Patient					

• The left-hand pane shows the number of Tasks within your organisation broken down by various Filters/Folders. Example All Open Tasks 168, Unassigned Tasks 29 and Assigned to Groups 6.

- Click on the ^b beside each folder to expand it.
- When expanded, you can see Tasks broken down in a relevant way i.e. by Task Type, or by User.
- Tasks appearing in this pane are colour coded as follows:
 - Red The Task has reached or passed its **Due Date**.
 - Black The Task has **NOT** yet reached its **Due Date** or has **no Due Date**.
 - Bold Text (Red or Black) A task has been changed/amended in some way recently.
 - The Top Right-Hand pane shows a list of tasks within the folder you have selected.
- The Bottom Right-Hand pane shows the content of the selected task.

How do I Create a New Task as a User?

Do one of the following:

- Press Ctrl+K on your keyboard from anywhere within SystmOne.
 OR
- Select Workflow>New Task from the Main Menu OR
- **Click** the ticon on the Main Toolbar on the left of your main screen.
- Creating a task from the Task window:

Y New Task			•			
Qk Appl For EDSM GP (Li Settings	/ Template <u>c</u> ncolnshire) mciude past o	Cancel	Unassigned User group Staff member Me Sender Multiple staff			
Task Miscellaneo	us	- Ø	Subject 🔘 No Si	ubject (vay 🔄 All recipients	must complete
B <i>I</i> <u>U</u>	i 🖻 🛍 🗅	2 🖓	SansSerif	▼ 12 ▼ ▼		洋 伊 田 🇴 🚨
			E	nter Task body		
Status Not Starte	ł	v (bue	▼ Flag	No flag 💌	Presets

- Complete appropriate fields:
 - Unassigned, User Groups, Staff Member, Me, or Multiple Staff, Status, Due by, Flag etc, and then enter notes as required.

IMPORTANT if you have a Patient Record open then the task will automatically be assigned to the current active Patient and the task will appear on the Patient Record,

NOTE: If you use this functionality then the task will only be sent when you **SAVE** the Patient Record.

Notifications:

Notifications are similar to emails and used to send attachments or messages to any user on SystmOne nationally. These messages are stored within the practice or unit and can be dealt with at any time. Users can access their own notifications via the notification button on the home screen and there is a separate window within SystmOne to manage notifications.

- Notifications are private to the sender and recipient.
- Users can access their own notifications via the notification button on the home screen.
- There is a separate window within SystmOne to manage Notifications.
- They are stored within the practice or unit and can be dealt with at any time by the recipient.
- They can only be sent between SystmOne users.
- They are not saved in Patient Records, therefore should not contain clinical details.

- Like e mails, you can send, reply to and forward notifications.
- They can be redirected to other users, e.g. if the recipient is on holiday.
- They have a fixed life span notifications are automatically set to expire two months after their creation, although the sender can extend this to up to three months.

To Create and Send a Notification:

• There are several ways to create a notification, the easiest is to use the shortcut keys of **CTRL+E** or alternatively you could go to the **Menu** and select **User<Notification** and the following screen will appear:

Y New Not	tification	x 5
Qk	Gancel	
Recipient(s)	Favourites Local User User Group Other User	
×	Mr Andrew Adamson	^
i	Mrs Belinda Brown	
	2 Recipients Selected	•
Attachment	None Attach file	
	C:AppsiTppAccDemo	
	V Notification is urgent	
	Send me a receipt when this notification is actioned by the recipient(s)	
Subject	ENTER THE SUBJECT HEADING FOR THIS MESSAGE HERE	
	ENTER YOUR MESSAGE HERE	
CHOOSE	THE DATE YOU WISH THE NOTIFICATION TO EXPIRE - THE DEFAULT IS 2 I THIS CAN BE CHANGED FROM BETWEEN 1 DAY TO 3 MONTHS	NONTHS
This message	e will expire on 03 Apr 2015 💌	Presets

Complete the message screen as required by adding the recipients, Attach a file if required, you can tick that the notification is Urgent, and/or Receipt is required when Notification is Actioned box's, add the subject, message and expiry date etc. once completed Click on the OK button to send.

Dealing with Notifications that have been Sent to You:

- **Click** on the **Notify** button on your new home screen. If you have any new and active notifications then the number will be on the top left of the button.
- Your Active Notifications are listed and visible as below and you can Right Click on each one to see the available options of Action, Delete, and Reply etc.

Finding Previous and Inactive Notifications:

• Use the **Notify** button on the home screen and then select the **Notifications** button



• Your **Notifications** are listed and visible as below and you can **Right Click** on each one to see the available options of **Delete, Reply etc**.

Unactioned (1)					R	edirection	Redirect	Canc	el:	Information	
ten Mt Chris Hat (1) S Al Netdicates (3) BDSM Community (Lincolnshire) (14) Community (Lincolnshire) (11) D SM Community (Lincolnshire) (1) D SM Community (Lincolnshire) (1)	Sent A 10 May 2013 12:38 10 May 2013 12:37 10 May 2013 12:22 08 May 2013 11:57 08 May 2013 11:57 03 May 2013 11:57 03 May 2013 11:37 03 May 2013 11:33 02 May 2013 14:48 02 May 2013 14:48 02 May 2013 11:10	Day Fri Fri Wed Wed Fri Fri Thu Thu Thu Thu Mon	From Mrs Carla Crispin Mr Darren Davison Mr Chris Hall Mrs Elsie Enfield Mrs Elsie Enfield Mr Andrew Adamson Mr Chris Hall Mr Andrew Adamson Mr Andrew Adamson Mr Andrew Adamson Mr Andrew Adamson Mr Andrew Adamson Mr Chris Hall Mr Andrew Adamson	To Mr Chris Hall Mr Chris Hall	Subject Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test Receipt:test	Ac De Re Fo Pri Vk Sa	ction ilete piy piy to All rev Attachment rev Attachment ew Original Messa	ige	Flag		
	29 Apr 2013 11:06	Mon	Mr Andrew Adamson	Mr Chris Hall	Receipt : time out	📰 Та	ble	•			

Instant Messaging:

Instant Messages are used to send a message directly and instantly to someone within your unit who is **currently** logged on. This message appears on their screen and can be answered or postponed. They are not stored to use later but there is an audit report that can locate past messages and their content.

Remember these guidelines when using instant messaging:

- They will appear on the screen of the recipient so be aware that anyone (including a Patient) who is with the recipient could also see the message.
- They should be kept short and to the point. They can be annoying to the recipient if he/she is in the middle of a consultation and the message is really long and detailed.
- Do not use if this information needs to be visible or saved on a Patient Record.
- Only people currently logged in can receive them.
- They are auditable so ensure content is appropriate.

To Create and send an Instant Message:

- To send an instant message go to the **Menu** and select **User<Messaging**
- The Messaging window will open showing the list of staff currently logged in.
- Use the **Disable Messages** button to postpone messages until a specified time if you are busy, if ready to accept messages again prior to the time specified just **Click** the **Enable Messages** button.

🍸 Messaging				23
Beep' when an instant message is receiv	ed Enable Messages	Disable Messages		
User	Role	User Last Logged On	Location	Fl ▲
CLAYTON, James (Mr)	System Administration	or 16 101 2010 P9:13	Training Room, Health House, Willerby	<u>A</u> ^
CLAYTON, Connor (Mr)	System Administ	ostpone Messages Until 📃 📴 🗐	Training Room, Health House, Willerby	
CLAYTON, Tawnie (Miss)	Trainer	16/07/2019 ▼ 11:04 Close 9:10	Trainer PC, Training Room, Health House, Willerby	
HALL, Chris (Mr)	Trainer	9:22	Various training rooms over NL & NEL	
	l	Qk		Ŧ
4 Users logged on				
	<u>S</u> e	nd Message Refresh <u>C</u> lose		

• Select the name of the message recipient and then select the **send message** button for the message window to appear and then write your message then **Click** on the **OK** button to send it.

Responding to Instant Messages:

• Incoming messages appear on the bottom right of your screen where you can then either **Reply**, **Postpone** or **Dismiss** the message.

	Message fro	m Mr Chris Hal	at 12 Jul 20	16 10:59
	Hello			
_				
	Reply	Postpone	Dismiss	

Please remember that:

- If you **Postpone** the message it will disappear and reappear in approximately 5 minutes time.
- If you **Dismiss** the message it will be deleted and can't be restored.

Logging Off SystmOne:

It is important to exit properly from SystmOne at the end of a session because it helps your system to save data quickly and work efficiently.

NOTE: Any settings you have changed during the current session will only be saved if you exit properly, for example changes to toolbars, changes to user preferences etc.

Option I - Using the Red X:

Ensure you are not in a Patient Record as you can't exit while an active record is visible.

- If you're in a retrieved record, **Click** on either the **SAVE** or the **DISCARD** button as appropriate.
- WARNING! Remember if you discard the Patient Record no data changes will be saved.
- From your Home screen **Click** on the Red Cross **LOW** at the top right of the screen to exit from SystmOne.
- You will then get the End SystmOne message:

Y Question		x
?	Are you sure you want to exit SystmOne?	
~		
	Show Message Next Time?	
	Kes No	

- Click on either the YES/No button as appropriate.
- You will also get a message to remind you to remove your SMARTCARD.

Option 2 - Using your FII key:

Ensure you are not in a Patient Record as you can't exit while an active record is visible.

- If you're in a retrieved record, **Click** on either the **SAVE** or the **DISCARD** button as appropriate.
- **WARNING!** Remember if you discard the Patient Record no data changes will be saved.
- From your Home screen **Click** on the FII key.
- You will then get the Lock Out Security message:

Lock Out Se	ecurity
eMBED Hu	mber Training GP
Password	L
	Ok Shutdown New User

- You can then **Click** on the Shutdown button.
- You will get a message to say SystmOne is closing down and remind you to remove your SMARTCARD.

NOTE: For both Options a black console window containing scrolling code will be displayed briefly and then disappear itself, please do not force close this. If there have been any problems during your session, however, the console window will remain on the screen and display details of the problem.

User Guide Disclaimer:

Please note that while we make every effort to keep this guide up to date SystmOne is updated approximately every 5-6 weeks, therefore some screens/menus may change. The screen shots are for illustrative purposes and may differ from your **LIVE** system as this is configured by each Organisation.