Admin Introduction User Guide V1.1

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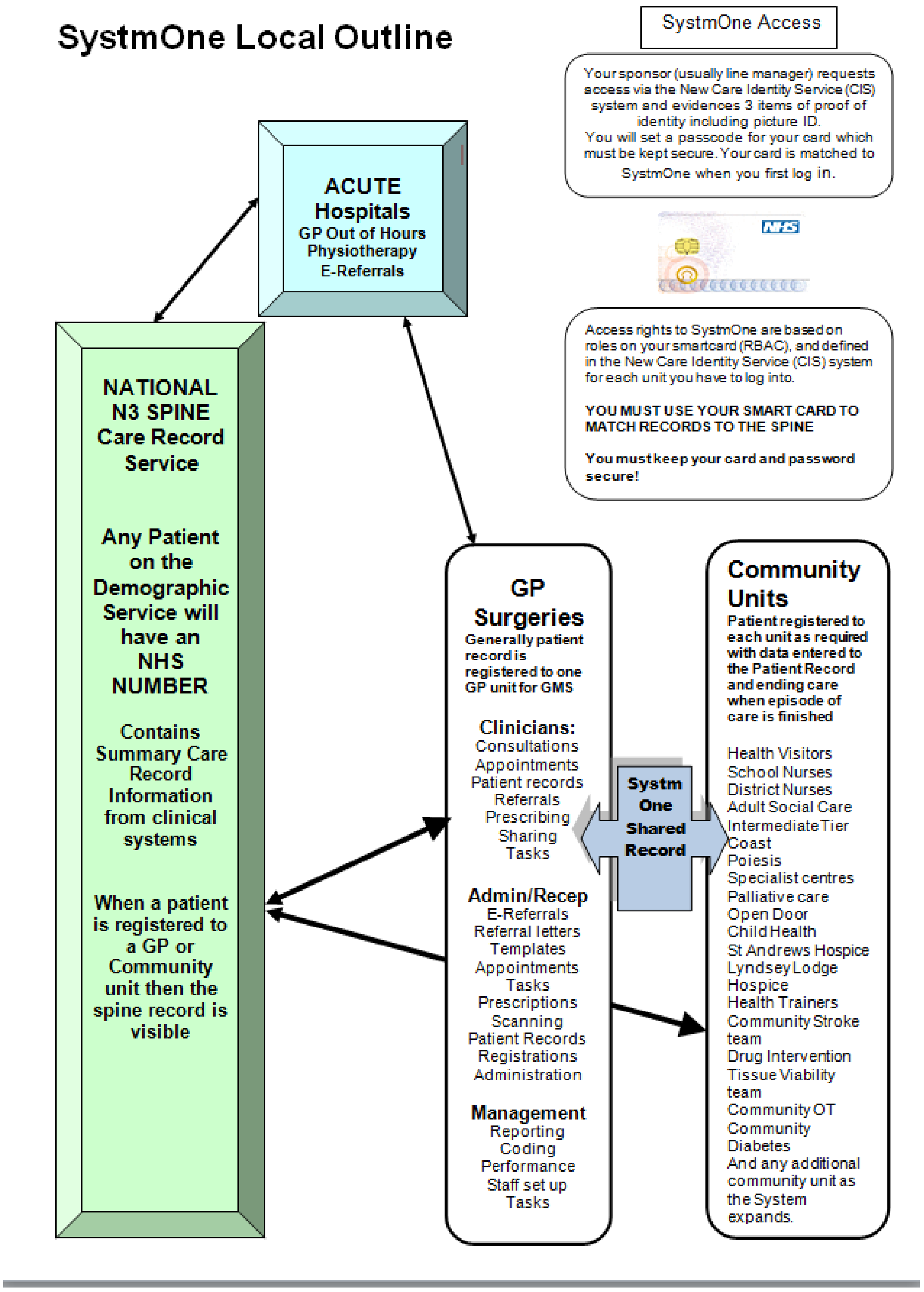
Introduction:

This user guide is aimed at providing each delegate with a basic introduction to SystmOne (S1). 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.

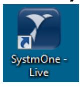
NOTE: Instead of monitoring the Patient Home view in the individual Patient Record, you can use the GP2GP Transfers screen to track when data extracts from other clinical systems are ready for you to add to the relevant SystmOne Patient Record.

Login, Lock Out and Exit the System Correctly:

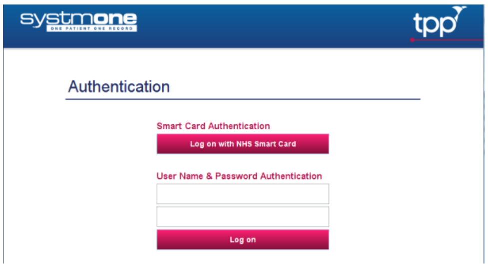
Two ways to log in:

Option 1 - 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.



    - This will then take you to your Profile screen:

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

NOTE: 1st time login – you may have additional fields to complete.

Option 2 - Username & Password:

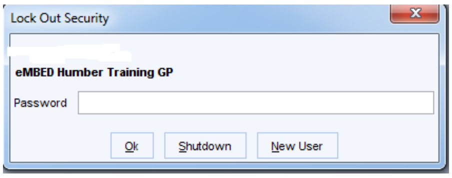
- Username and Password will be given to you by your own Unit if they allow this method.
    - **Enter Username and Password** in the appropriate fields in the authentication screen as above and then **Click** on the Log on button to take you to your home screen.

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

SystmOne Lock Out:

[Always lock your system]() 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 F11** and **remove your Smartcard to: Lock the screen, Switch User or Shutdown** the system:

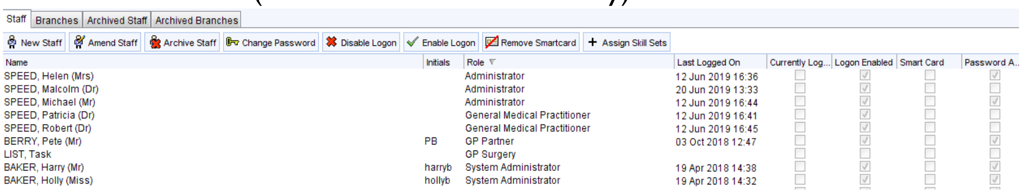


- If used to **Lock** or **Switch Users**, when you return you just need to log back in with your Smartcard and enter your pin number.

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).



Name	Initials	Role	Last Logged On	Currently Log...	Logon Enabled	Smart Card	Password A...
SPEED, Helen (Mrs)		Administrator	12 Jun 2019 16:36		✓		✓
SPEED, Malcolm (Dr)		Administrator	20 Jun 2019 13:33		✓		
SPEED, Michael (Mr)		Administrator	12 Jun 2019 16:44		✓		✓
SPEED, Patricia (Dr)		General Medical Practitioner	12 Jun 2019 16:41		✓		
SPEED, Robert (Dr)		General Medical Practitioner	12 Jun 2019 16:45		✓		
BERRY, Pete (Mr)	PB	GP Partner	03 Oct 2018 12:47		✓		✓
LIST, Task		GP Surgery					
BAKER, Harry (Mr)	harryb	System Administrator	19 Apr 2018 14:38		✓		✓
BAKER, Holly (Miss)	hollyb	System Administrator	19 Apr 2018 14:32		✓		✓

- **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.

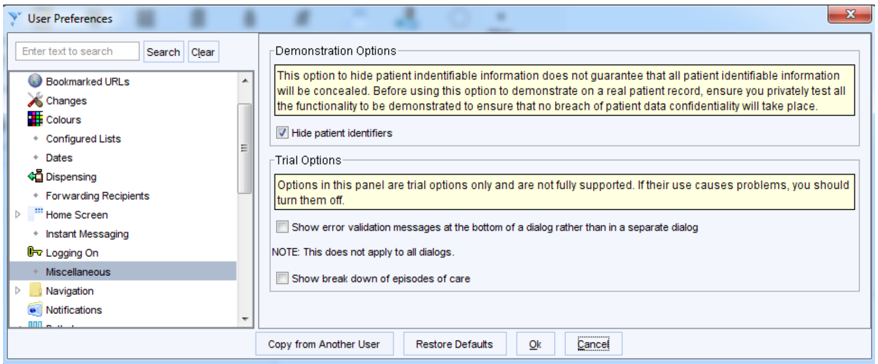
How to HIDE Patient Details in SystmOne:

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.

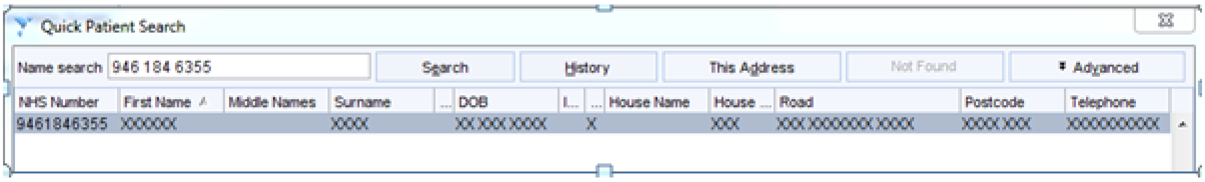
(The option to hide patient identifiable information <u>does not guarantee that all patient identifiable information will be concealed.</u> Before using this option to demonstrate on a real Patient Record, ensure you privately test all the functionality to be demonstrated to ensure that no breach of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



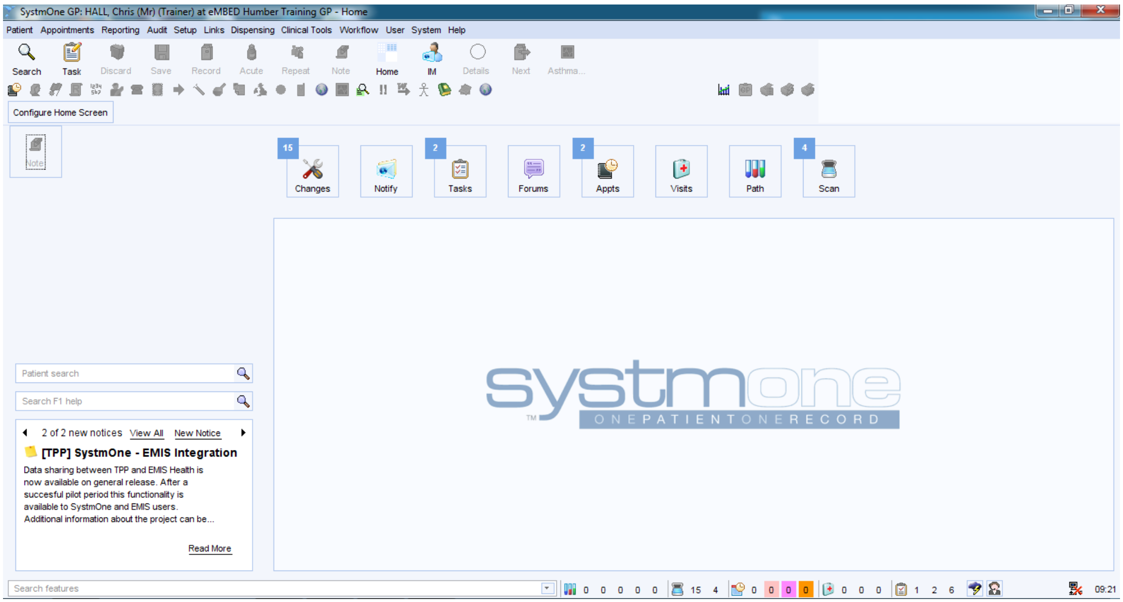
- **F10 search** to identify the patient using the correct **NHS number** so only one patient is displayed in results screen (Avoid searching via name as several names could be returned in results), you will only see xxxxxx's for patient details as displayed below:



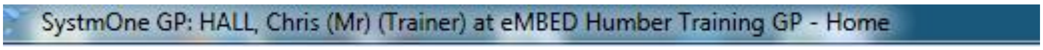
- This will result in the patient demographic box then appearing as below (and addresses within the new journal will appear as XXXs):

- 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:



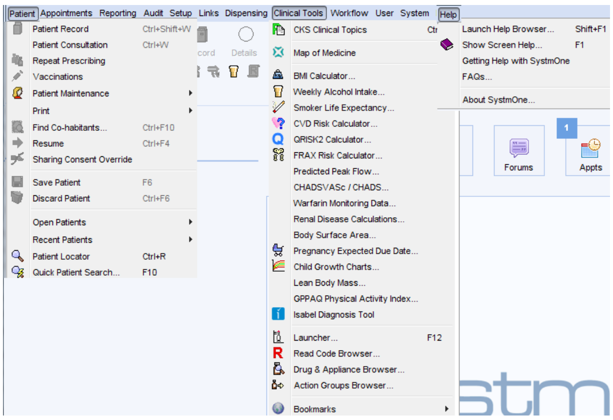
The SystmOne Title Bar is displayed along the top of the screen:

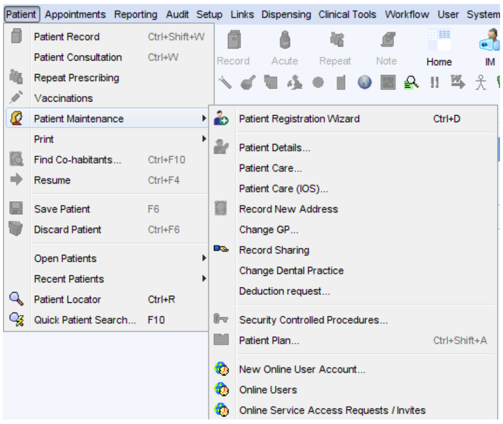


- This displays the Name of the user logged on, the Unit name and the current page you are on, in this case the Home screen, this changes as you move around the system.

The SystmOne Main Menu is displayed under the Title Bar:

- 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:

A: 

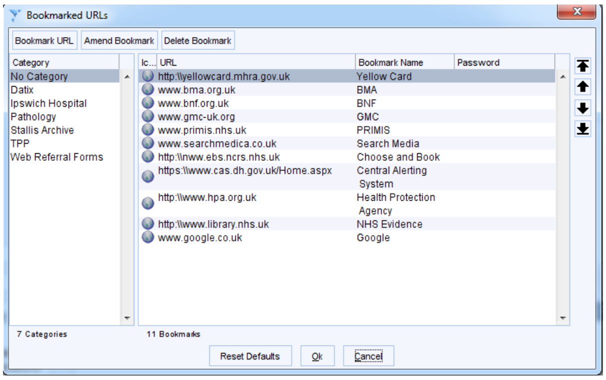
B: 

- **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.

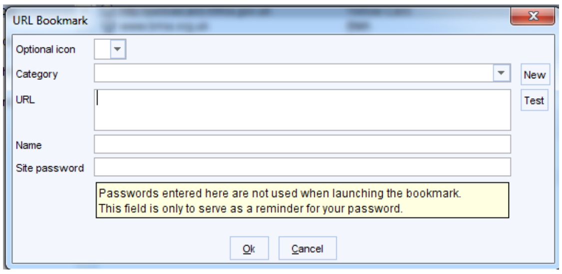
Bookmarks:

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.



- 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:



Toolbars:

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

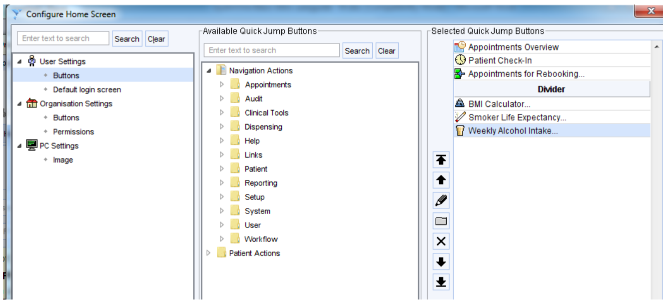
- The buttons in the toolbar allow you to perform common tasks, for example searching for a Patient Record, saving or discarding the currently retrieved Patient Record, issuing an acute prescription etc.
- As you can customise your toolbars, it is possible for everyone's toolbar to look different although 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.



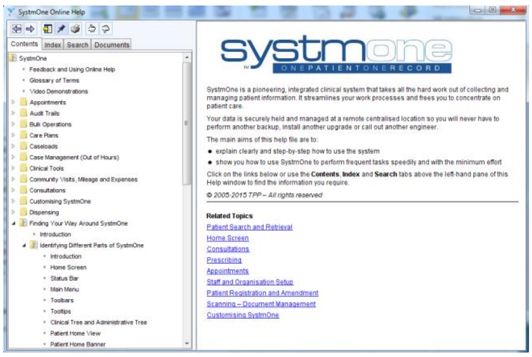
- In the left window pane select **Buttons** under **User Settings**.
- Then in the centre pane, use the search field to search for a subject by name i.e. notifications, quick note, etc. or select from relevant folder if known.
- **Double Click** on an item to move it to the Right-Hand window.
- Position 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 **F1**, 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**:

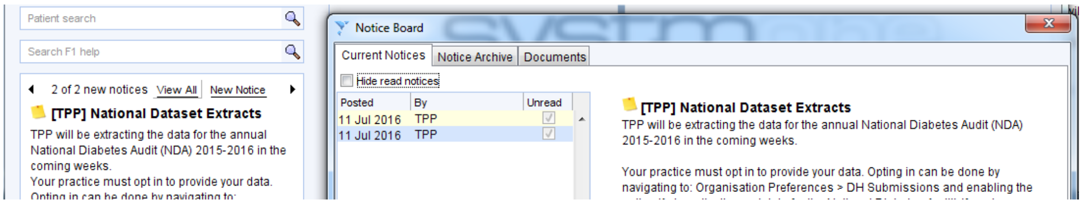
- **Option 1 - Shift & F1** key launches the Help Browser so you can search for help files by using the Contents, Index, Search or Documents tabs as required:



- **Option 2 -** The **F1** 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:

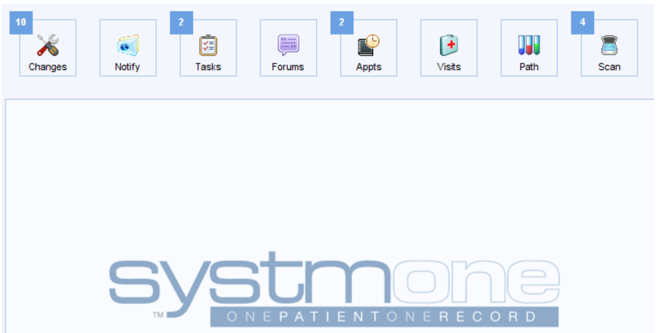


- To view **Click** on **View All**, once read, **Click** on the **"Don't show again"** to remove the notice from view and it will be marked as read.
- If you are on the system at the time of the release (approximately every third Thursday evening) you will be prompted to log off SystmOne, wait approximately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

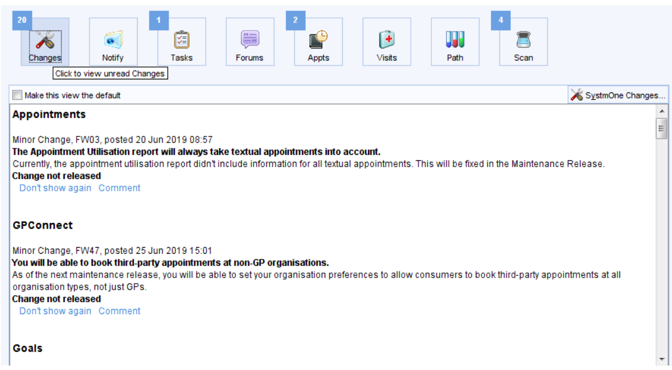
- If a square appears with a number – number outstanding.
- Button's on display are - Changes, Notify, Tasks, Forums and Appointments etc. (Notifications and Tasks covered in more detail at the end of this user guide.)



SystmOne Change Notifications:

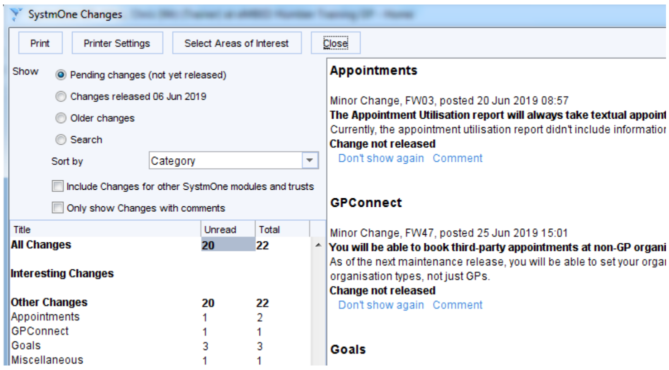
The Change window is used to list all changes that will be made to the system in the next maintenance release/update.

- **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  button that will display all old notices.



- 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.

- 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 **F1 help** to view details:

Function Key Shortcuts:

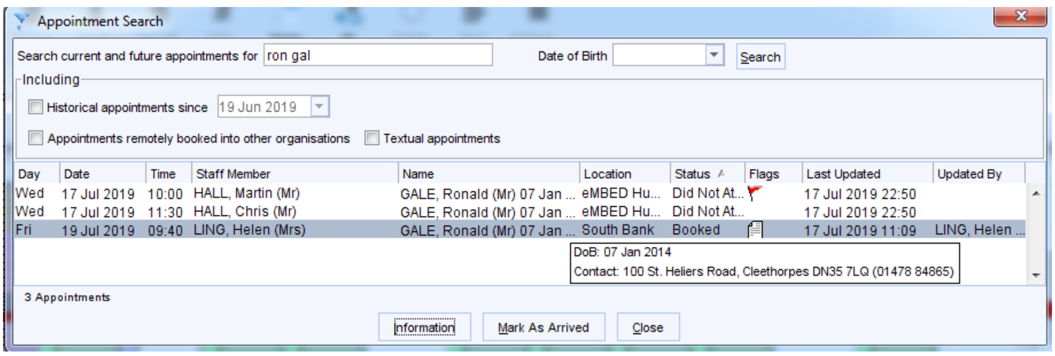
SystmOne Function Keys										Ctrl + R – Opens the Patient Locator Ctrl + F6 – Discards Patient Record			
F1	**F2**	**F3**	**F4**		**F5**	**F6**	**F7**	**F8**		**F9**	**F10**	**F11**	**F12**
Help	Add to Favourite Screen	Add a Recall	Address Book		Refresh Screen	Save Patient Record	Spell Check	Home 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.

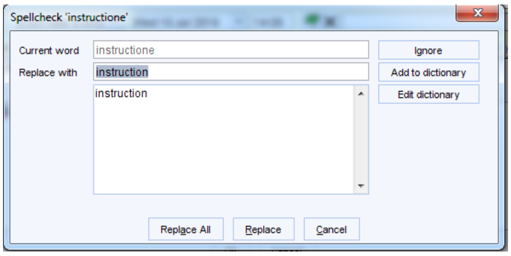


To view a Patient's Date of Birth, Address and Preferred Contact Number, hover the mouse over the Patient's name. The details are displayed in the form of a tooltip, if a **Coloured Block** or a **Flag** is displayed in the **Flags** column, hover the mouse over it to view the details (see example in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



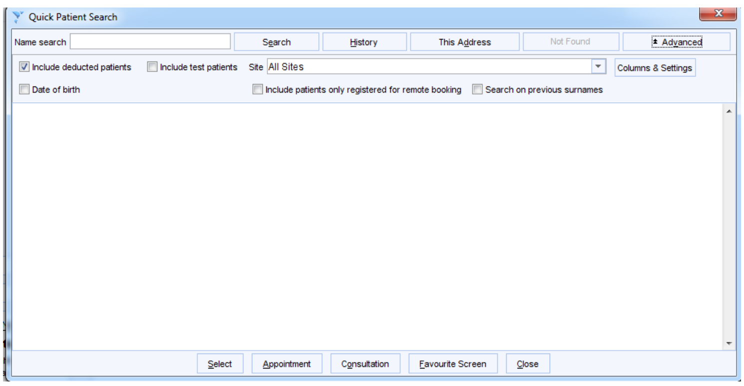
NOTE: The Dictionary complements the spell checker function as it allows you to personalise your spell checker so that it works more efficiently. You can add names or words you use frequently that the spell checker does not currently recognise so that it will not pick them up in future.

Effectively Search for and Open a Patient Record:

The Quick Patient Search Dialog:

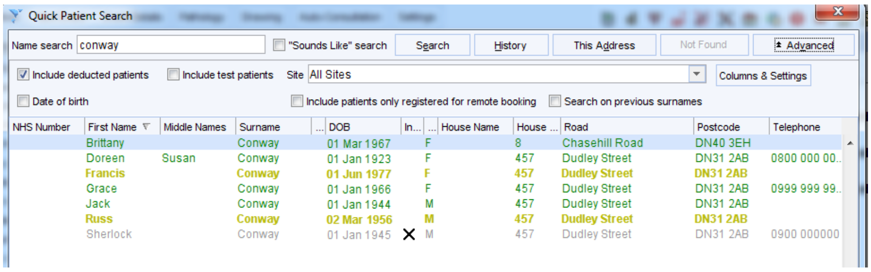
Do one of the following:

- Press the **F10** key on your keyboard.
  OR
- **Click** the  button in the toolbar at the top of your home screen.
  OR
- 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:



- 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).

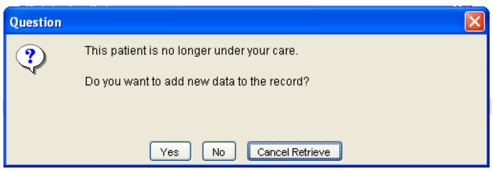
- If the **Quick Patient Search** returns too many Patients the **Patient Locator** may help you to narrow down the list - see **Using the Patient Locator Search** below.
- **Type** a few letters of the Patient's forename, then type a space and then type a few letters from the Patient's surname, e.g. 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.



- 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 F1 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.
  - ***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:

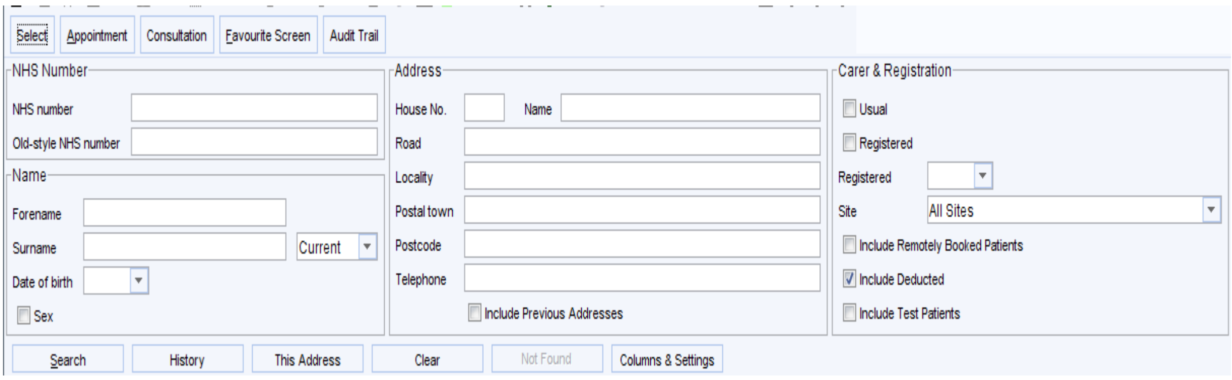
- You then need to record the reason you are accessing this deducted record, and then **Click** the **OK** button, this sends this to the Privacy Officer for your Unit to check and validate.

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**.



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 Find 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:

  - Today is the Patient birthday. - The Patient is deceased.

  T - Test patient. X - A deducted patient.

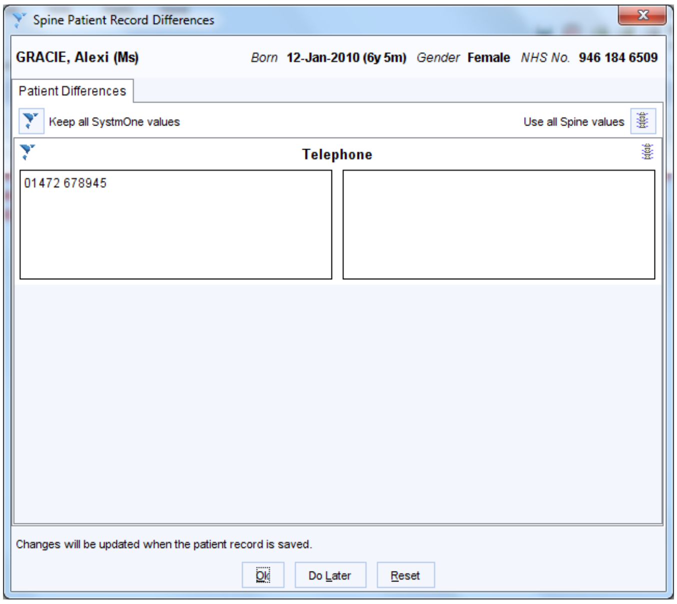
Spine Difference Screen:

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

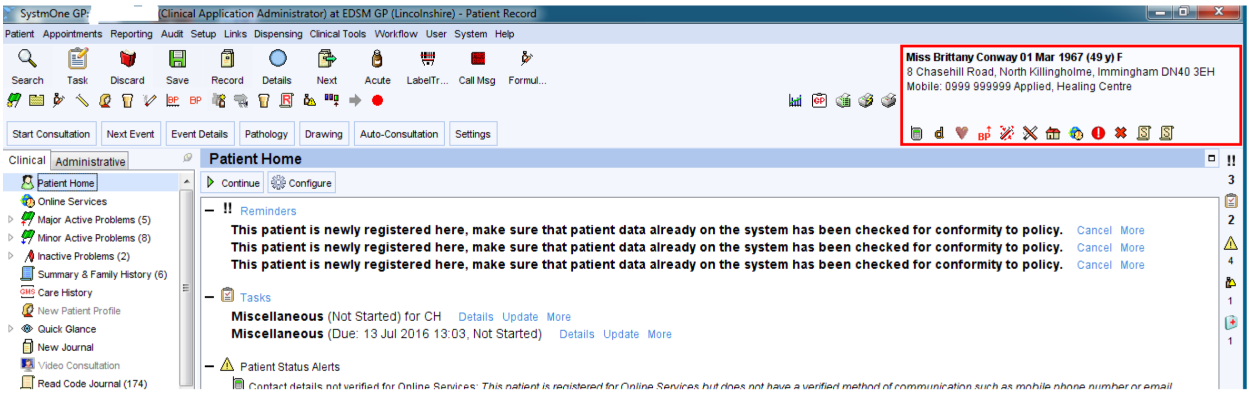
- This screen shows any identified differences between what's recorded on SystmOne and on the Spine e.g. SystmOne telephone number is 01472 678945 where the Spine has nothing recorded or SystmOne address has no Post Code, yet Spine address includes the Post Code.

- 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.

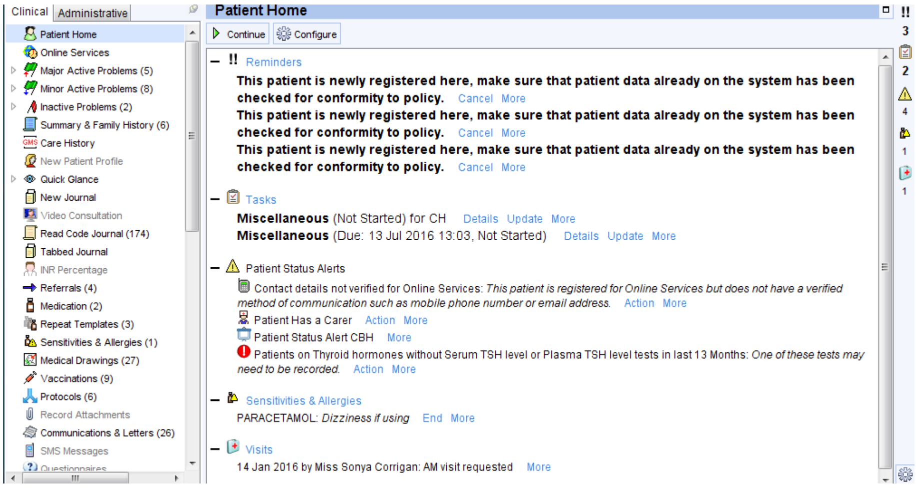


Navigate Around the Patient Record:



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 ▷ beside them:
    - To **View** the Sub-Nodes, **Click** the ▷
    - 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:

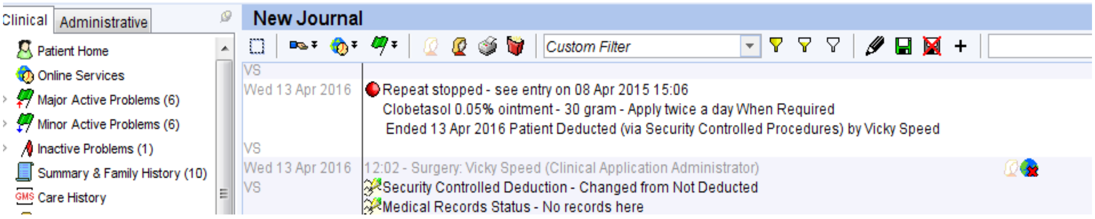
You can show or hide your Clinical/Administrative Tree so you get a full screen of the dialogue screen details, to **Unpin/Hide**, **Click** on the above the trees and the trees will be reduced and a **Tab** appears.

- 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.

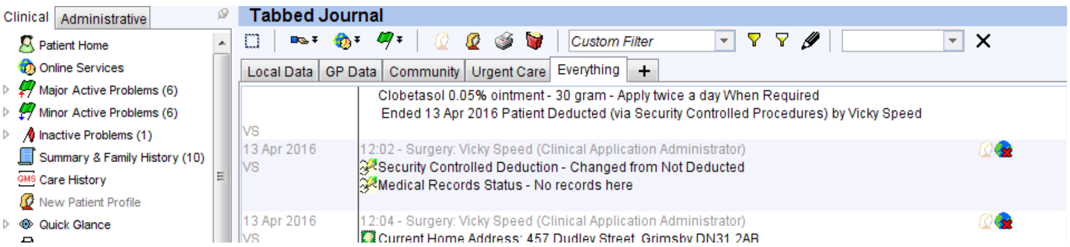
Examples of Clinical Tree Nodes:

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.



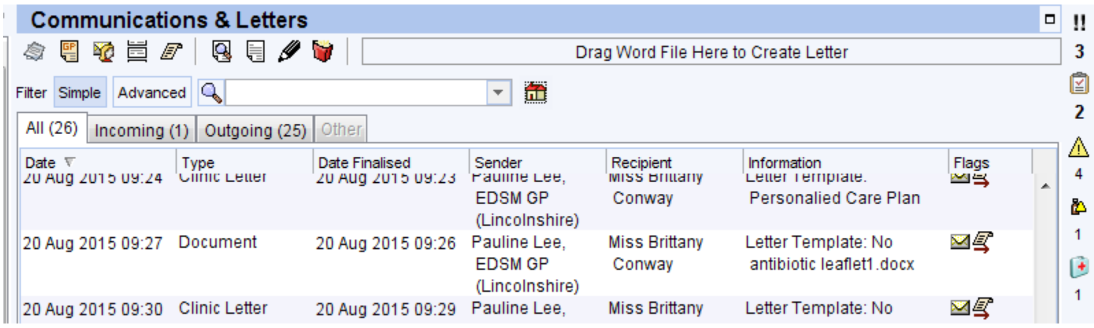
Tip: To view all the details contained in the patient record, click at the top of the New Journal view or at the top of the Tabbed Journal when viewing the **Everything** tab.

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).

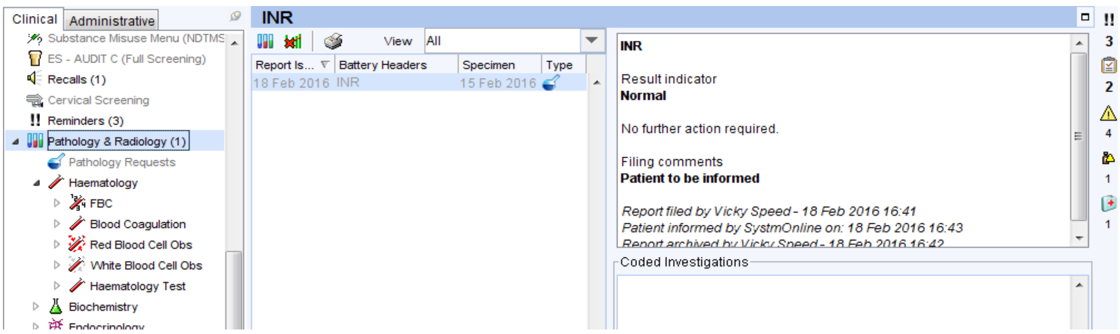
- **Online Full Clinical Record** – Consists of coded entries plus communications, letters and free text from the date requested (at the moment) for your organisation.
- **Online Detailed Coded Record** – Consist of coded entries from the beginning of the record for your organisation.

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.



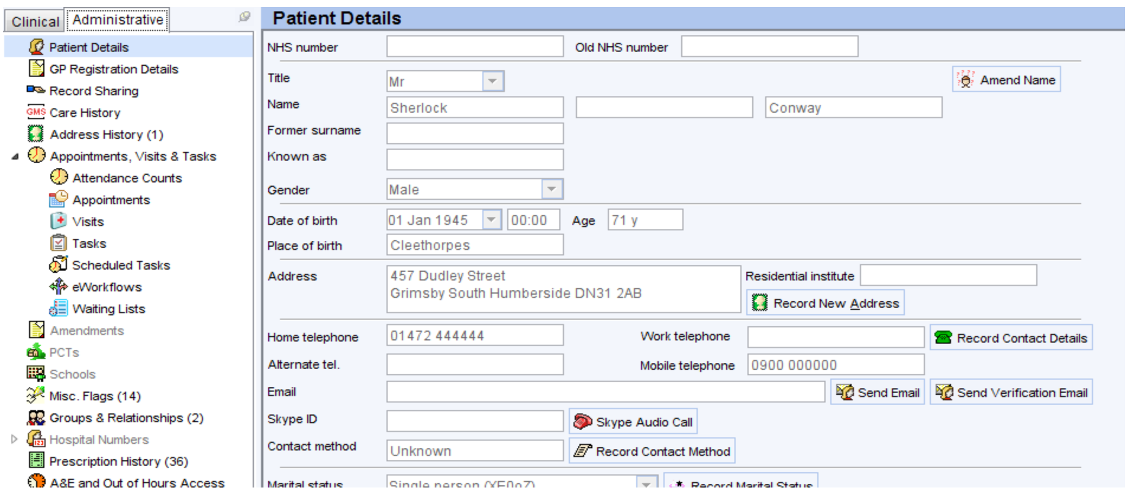
- To view only your organisations documents **Click** on the  button to the right of the screen.
OR
- **Click** on the magnifying glass  to search for specific letter types.

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.

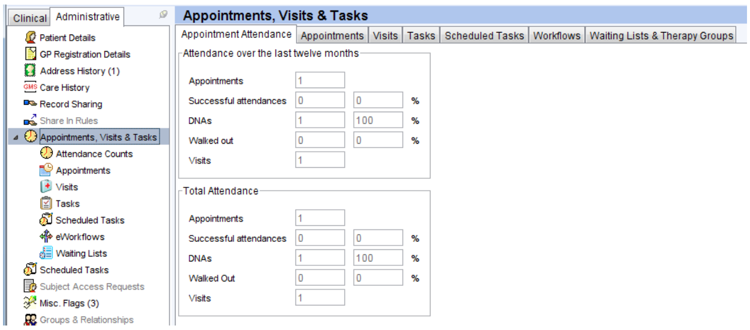


Examples of Administrative Tree Nodes:

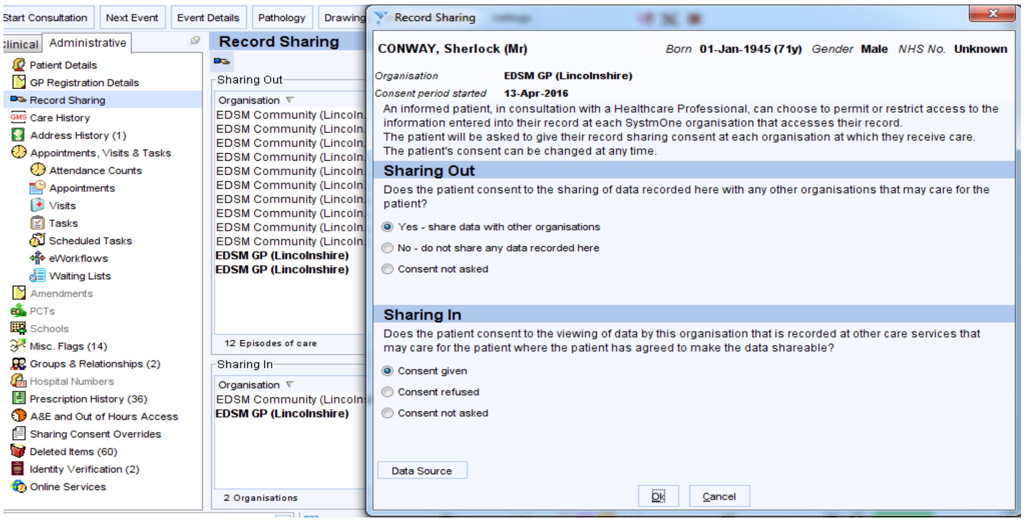
Patients Details Node:
This Node allows you to be able to update Patient details where there is an icon at the end of the field, **Click** on it and then update accordingly.



Appointments/Visits/Tasks Node:
This is where you can view details by selecting each section as appropriate.



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.



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

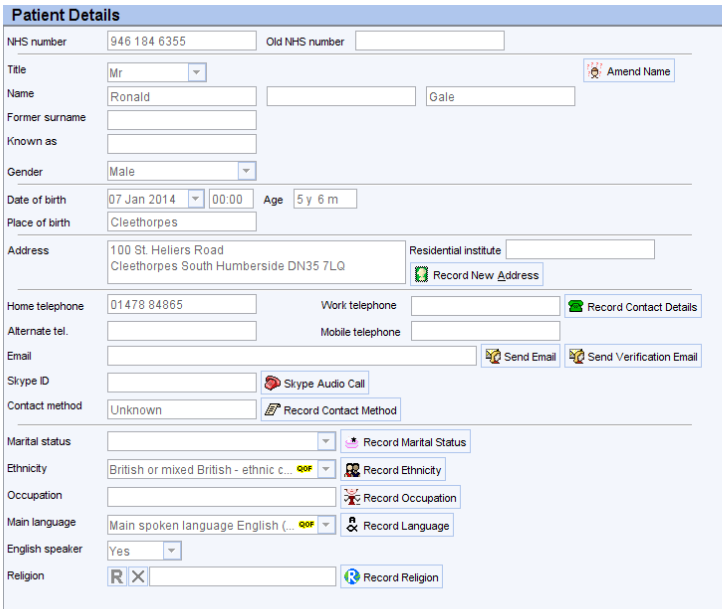
Amend Patient Details:

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

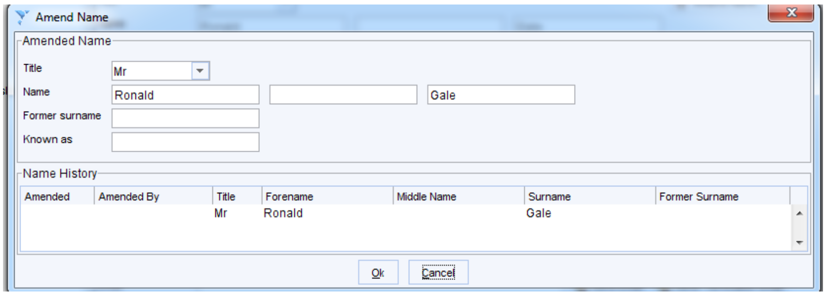
- From the main menu **Patient>Patient Maintenance>** and then select the appropriate Option/Node.
  OR
- From the **Administrative tree** in the Patient Record **Select**:
  - **Patient Details Node -** Complete from that screen.
  - **Address History Node -** Where you can amend details on Address, 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.**

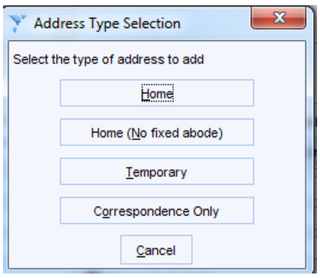
Patient Details Screen:



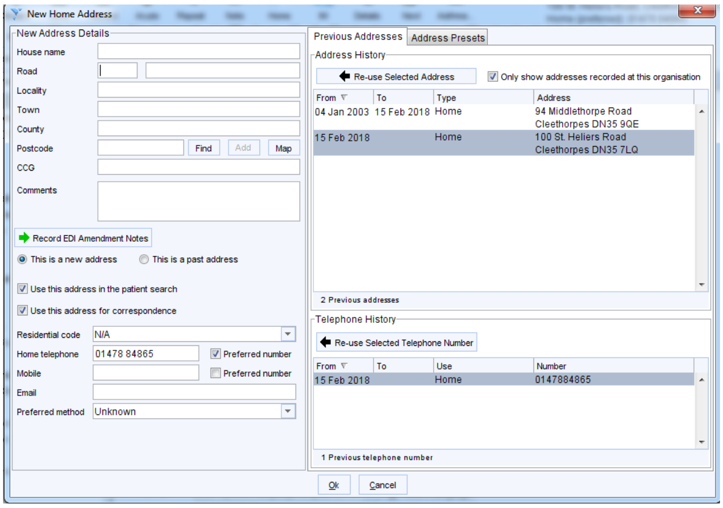
- In the screen above you have various Icons that you can **Click** on to amend details for example:
  - **Click** on the  button and the following screen is displayed for you to amend details, once completed **Click** the **OK** button to make the change, remember that to commit the changes once all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



  - **Click** on the  button and the following screen is displayed for you to amend details:

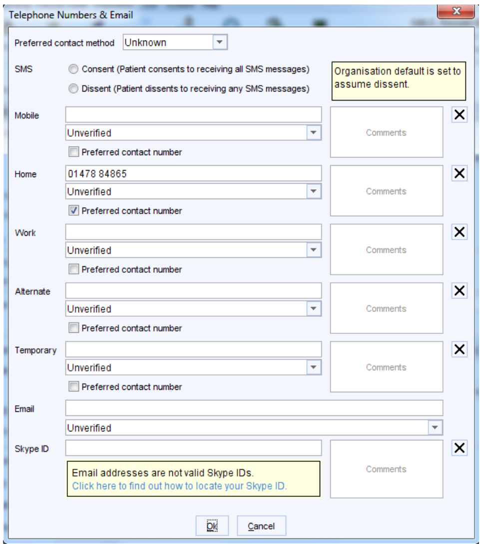


  - **Click** on the  button to display the New Home Address dialogue screen where new addresses, previous addresses etc. can be recorded, once completed **Click** the **OK** button to make the change:

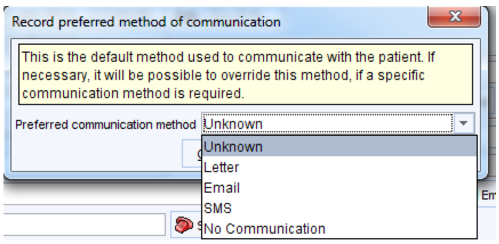


- When you select the other options under the **Record New Address details** i.e. Home (No fixed abode), Temporary or Correspondence Only buttons they display appropriate screens to complete and once completed **Click** the **OK** button to make the change.

- **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:



- **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:



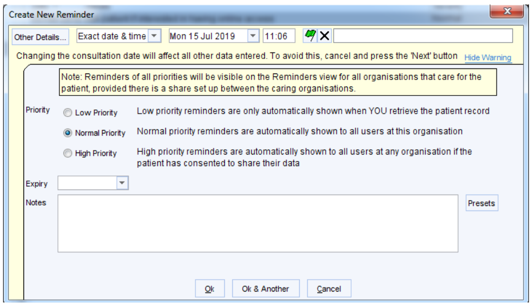
NOTE: Remember that to commit the changes once all completed you have to **SAVE** the record.

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:



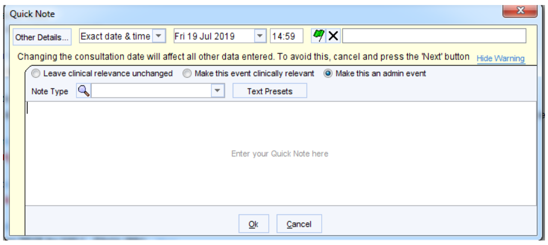
NOTE: Rules that apply to visibility of reminders are displayed on the screen and can also be found using F1 Help.

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  in the toolbar

    OR
  - **QJB** and the Quick Note dialog is displayed:



  - 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.

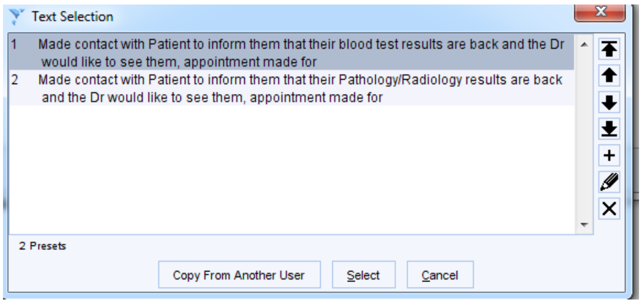
If you often need to type the same text when recording quick notes on Patient Records, you can use **Presets**. This allows you to type in and select standard text (see below for further details on how to create and use presets).

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:



  - **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 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 Save button **-** Saves all the information you have entered in this 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 Discard button **-** Close the Patient Record without saving any of the information you have just entered.

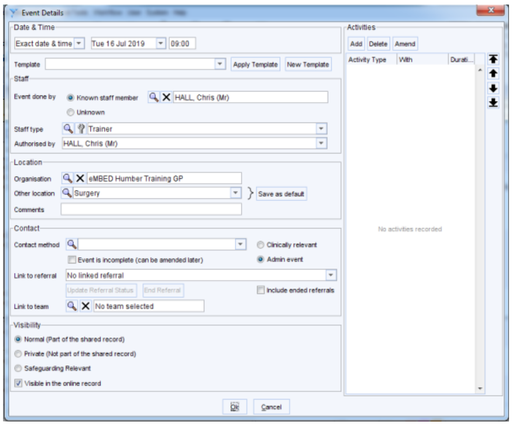
Next/Next Event:

- 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.

Event Details:

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



- 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.

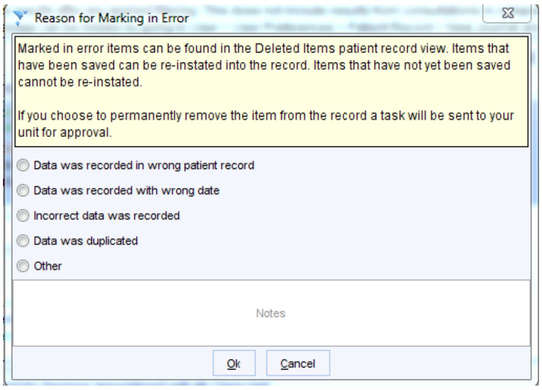
> **NOTE:** This option should only be used in exceptional circumstances, for example if a patient could come to harm as a result of an entry still being visible in the record.

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  (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.

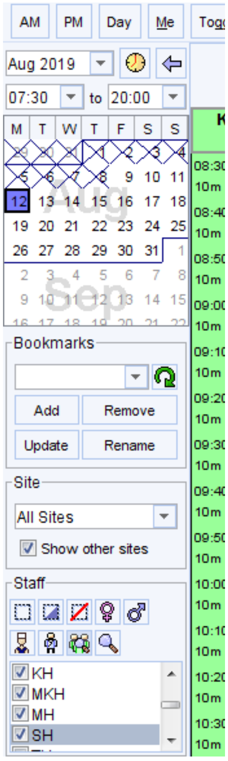
Book and Manage Appointments:

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:



- 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.

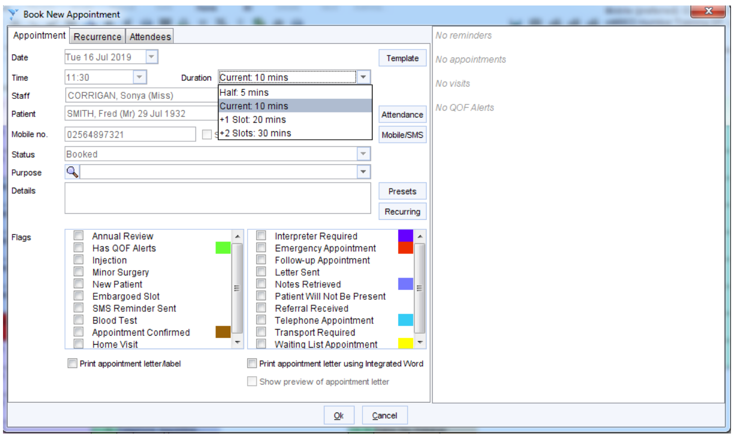
Making a Booking from the Appointments Overview/Appointment Ledger:

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.

- 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:**

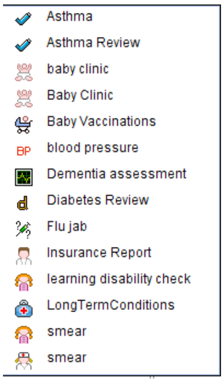


NOTE: A panel is displayed on the Right-Hand side of the **Book New Appointment** dialog. Any Reminders are displayed, together with details of any other booked visits and/or appointments and any **QOF** alerts triggered.

- **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:



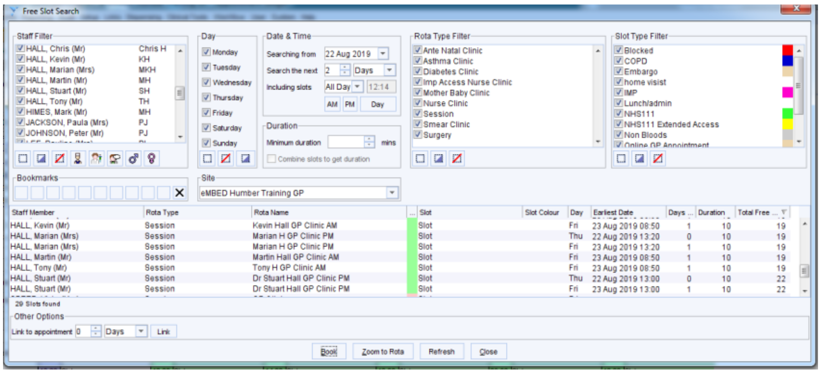
- **Double Click** on the appropriate **Appointment Template** and any details relating to that template will be entered into the appropriate fields.
- **Flags -** Select any flags you want to attach to the appointment from the list provided.
- Tick either **Print Appointment letter/label** or **Print 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:

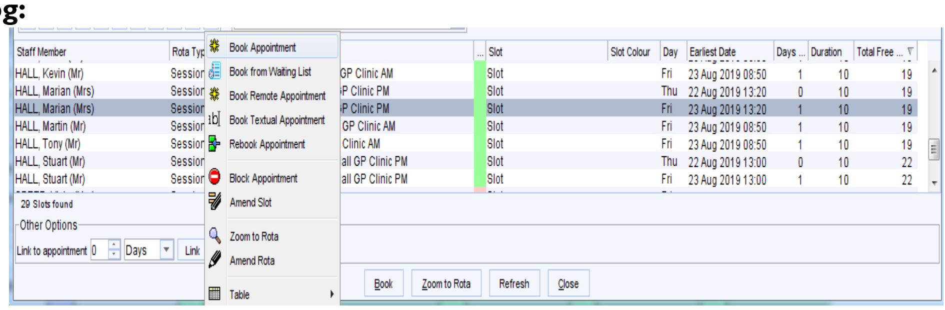


- Select the appropriate details in the top half of the screen you want to view for, such as staff member, days, rota type, slot types, sites etc.
- If the patient requires more than one appointment to be booked at this time, use the **Link to appointment** fields under 'Other Options' to specify the 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:

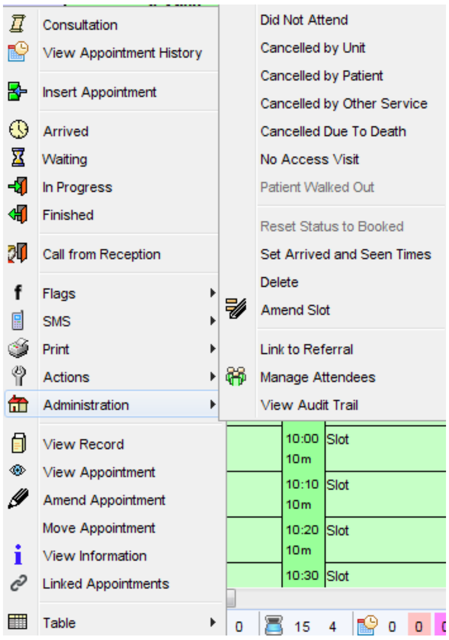


- **Right Click** to book a slot and find a patient.
- If the earliest slot is acceptable then continue to book appointment.
  OR
- **Click Zoom to Rota** to find appropriate time slot.
- **Double Click** into the slot.
  OR
- **Right Click** and select **Book Appointment** to search for the patient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



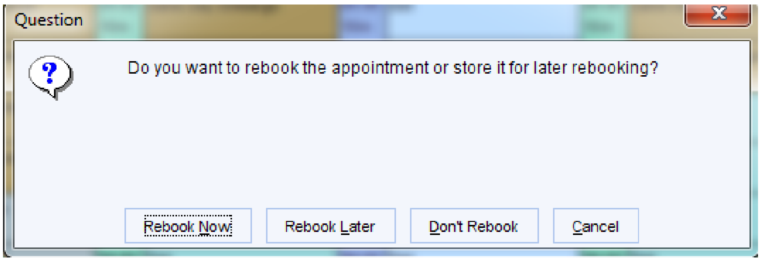
To Delete an Appointment:

- **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.

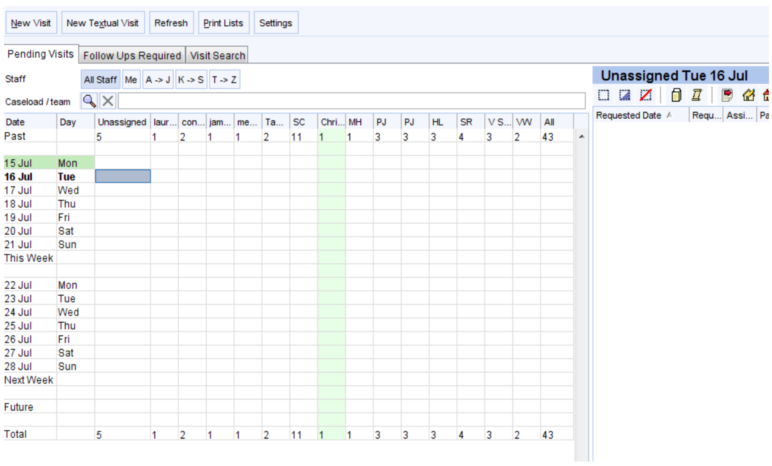
Appointments stored for rebooking remain listed on the Appointments for Rebooking dialog until rebooked or deleted. Deleting an appointment from the Appointments for Rebooking dialog will remove it from the Appointments for Rebooking list but will not delete the original appointment.

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>:**

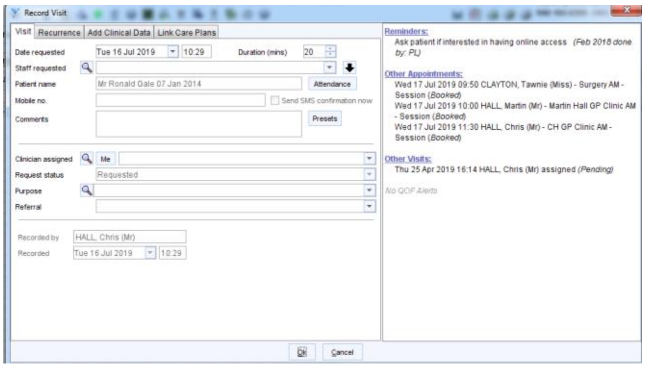


Toolbar Buttons Available on the Visits Screen:

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 ***pink*** 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 ***pink*** 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 ***pink*** if a staff member is on leave on that day.
	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**.

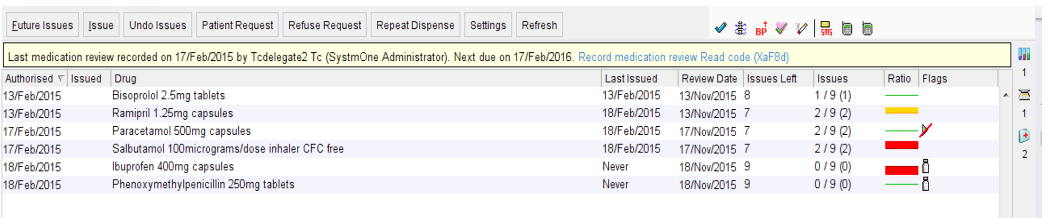
Issue a Repeat prescription:

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:



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 F1 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  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.

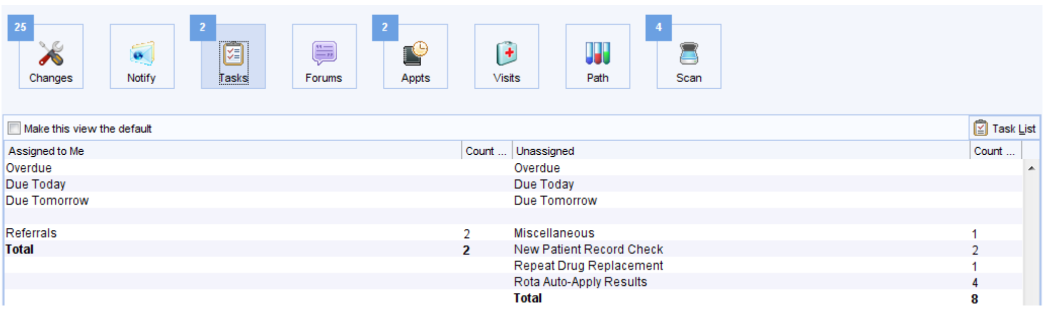
What do the Task Types Mean?
There are 2 Main ways of creating tasks, those created automatically by Systmone as part of a Process or those created by an Individual User.

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.

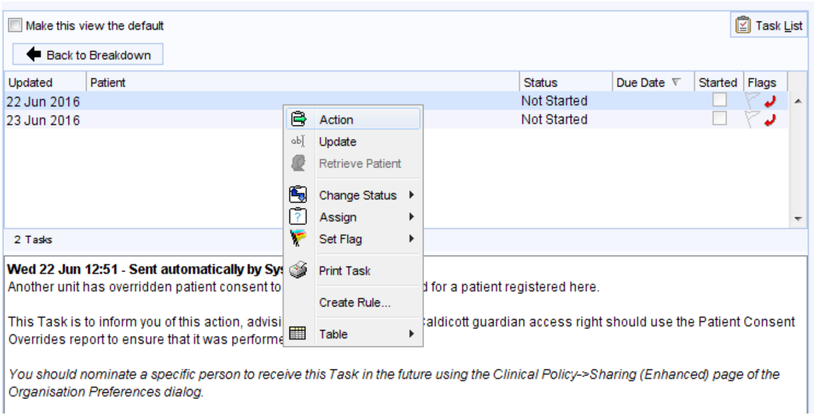
How do I access my Tasks?

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



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).

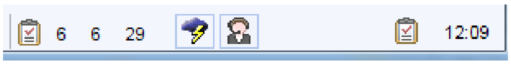
- **Double Click** on a folder to see and process the tasks within that folder.
- To Select a task from the list, and read its content, **Left Click** on the task. The task content can be viewed in the bottom pane.
- **Right Click** on each task to see the list of processing options.



- 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).

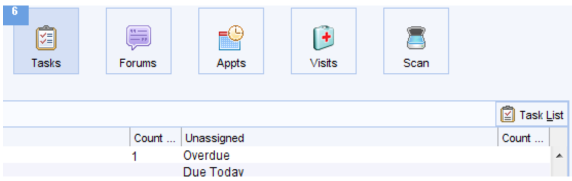


- You can also select for a dialog to appear each time a new Task arrives.
- **Click** the **Settings** button on the Task List screen.
- Select the **Sending & Receiving Node** of the tree and tick the **When a Task is assigned or created for me, show a dialog**. Then **Click OK**.

Managing Tasks via the Task List Window:

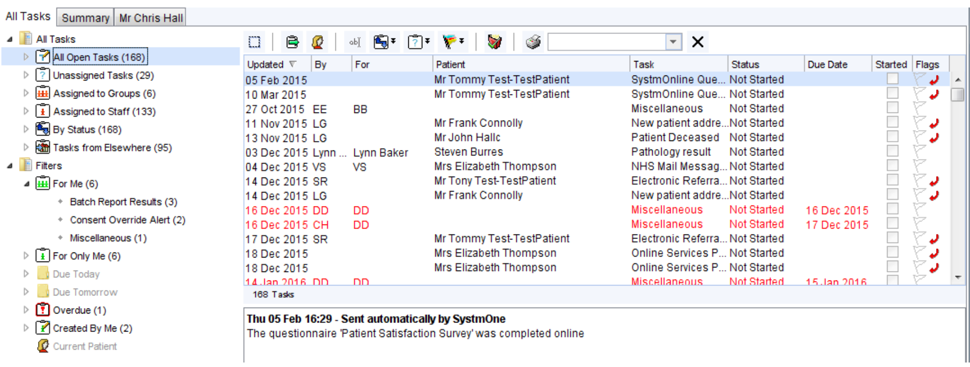
The task list allows you to Monitor and deal with all tasks within the unit or practice.

- **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:



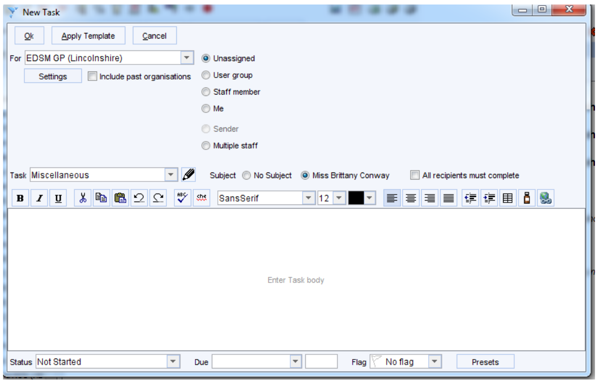
- The left-hand pane shows the number of Tasks within your organisation broken down by various Filters/Folders. Example All Open Tasks 168, Unassigned Tasks 29 and Assigned to Groups 6.

- **Click** on the 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 Task icon on the Main Toolbar on the left of your main screen.
- Creating a task from the Task window:



- 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:

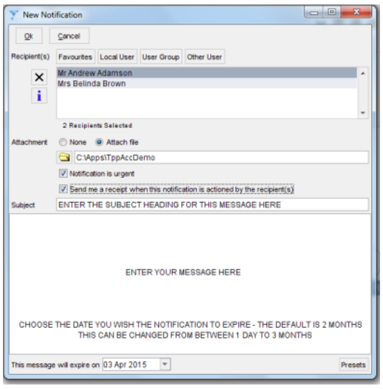
Notifications are similar to emails and used to send attachments or messages to any user on SystmOne nationally. These messages are stored within the practice or unit and can be dealt with at any time. Users can access their own notifications via the notification button on the home screen and there is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



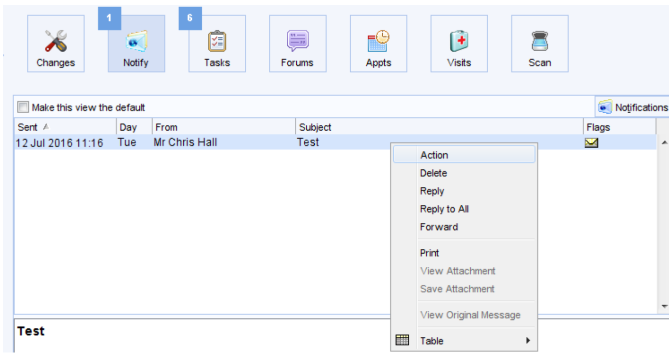
- Complete the message screen as required by adding the recipients, **Attach a file** if required, you can tick that the **notification is Urgent**, and/or **Receipt is required when Notification is Actioned** box's, add the **subject**, **message** and **expiry date** etc. once completed **Click** on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

Instant Messaging:

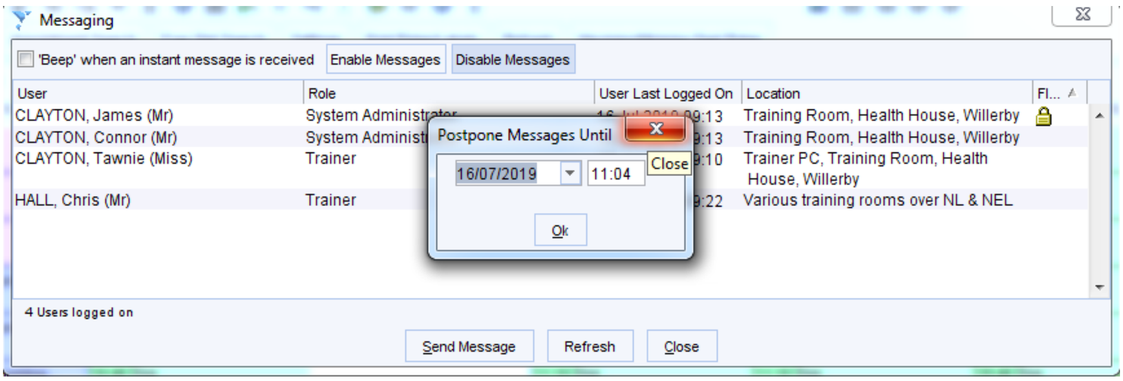
Instant Messages are used to send a message directly and instantly to someone within your unit who is **currently** logged on. This message appears on their screen and can be answered or postponed. They are not stored to use later but there is an audit report that can locate past messages and their content.

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.



- 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.

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:

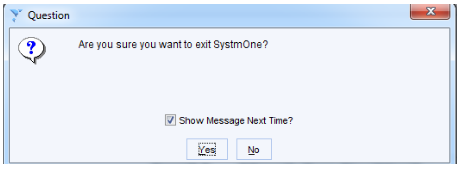
It is important to exit properly from SystmOne at the end of a session because it helps your system to save data quickly and work efficiently.

> **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 1 - 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  at the top right of the screen to exit from SystmOne.
- You will then get the End SystmOne message:

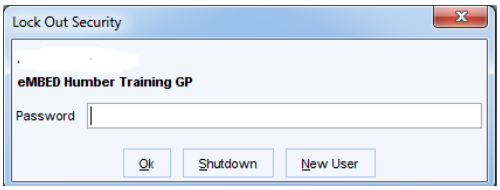


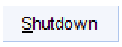
- **Click** on either the **YES/No** button as appropriate.
- You will also get a message to remind you to remove your SMARTCARD.

Option 2 - Using your F11 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 F11 key.
- You will then get the Lock Out Security message:



- You can then **Click** on the  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.