

# SystmOne for Beginners

USER GUIDE PRIMARY CARE SYSTEMS TRAINING TEAM

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# NHS

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# Introduction

This user guide is aimed at providing staff with a basic understanding of SystmOne. Staff will still require specific role-based training and this is highly recommended.

# Smartcard Access

Your sponsor (usually the Practice Manager) requests access for you by completing an RA02 form and sending it to the Registration Authority (RA), alongside 3 proof of identity including a photo ID.

Access rights to SystmOne are based on roles on your smartcard (RBAC). Your sponsor for each unit you wish to have access to, will need to complete an RA02 form.

#### Please keep your Smart Card secure and not to share access details with others.

It is a chip & pin card. Smartcards will have:

- Your name
- Your Photo
- Your Unique Universal Identification Number (UUID)

# Login, Logout and Lock SystmOne

Two ways to log in:

#### Option 1 – NHS Smartcard Access

No one should use the system without using their **Own** Smartcard. Using your Smartcard will ensure that you are connected to the Spine.

- Insert your smartcard into the card reader and enter your passcode to activate your account. Depending on your device you are using the card reader may be on your keyboard, on the side of your laptop or could be an external card reader plugged into your device.
- Double click on the SystmOne Live icon on your desktop.
- When you are on the Authentication screen click on the Log on with NHS Smartcard button.

🍸 SystmOne	-	- 🗆 ×
systmo	ne	tpp
Authenti	cation	
	Smart Card Authentication Log on with NHS Smart Card User Name & Password Authentication Isername Password	
	Log on	
Access to this computer/Solution and any unauthorised access to, this computer/So user, by proceeding to access and use th are contained or referenced within it or wh	information it contains is limited to authorised users only. Legal action can be tal lution and/or any information it contains, including pursuant to the Computer Misu s computer/Solution and/or the information it contains, you are accepting any term ich have otherwise heen drawn to your attention as an authorised user	ken against unauthorised use of, or ise Act 1990. If you are an authorised ns of use, notices and policies which





• This will then take you to your Profile screen:

SystmOne		- 🗆 X
systmone	)	tpp
Welcome back		
Information	Enter text to search Clear	Show hidden profiles
You last used SystmOne on Thursday at 13:52.	North West London ICB Reporting Unit Systems Support Access Role, Last used 04 Jan 2023 11:28	Log on
Click 'Log on' next to the profile that you want to use.	West London Borough - NW London ICB Reporting Unit Systems Support Access Role, Last used 04 Jan 2023 11:30	Log on
	General Practice	
	Brentford Group Practice Systems Support Access Role, Last used 02 Feb 2023 14:24	Log on
	Clifford House Medical Centre Systems Support Access Role, Last used 02 Mar 2023 13:52	Log on
	Clifford Road Surgery Systems Support Access Role, Last used 20 Jan 2023 11:06	Log on

- Select the unit you would like to login to from the drop-down list (if you are working at more than one).
- Click on the button which will then take you to your **Home Screen**.

**NOTE:** 1<sup>st</sup> time login – you may have some additional fields to complete.

#### Option 2 – Username and Password

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

🍸 SystmOne		- 0 ×
systmo	ne	tpp
Authenti	cation	
	Smart Card Authentication Log on with NHS Smart Card User Name & Password Authentication Password Log on	
Access to this computer/Solution and an unauthorised access to this computer/Solution and an uset, by proceeding to access and use th	information it contains is limited to authorised users only. Legal action can be taken ago bution and/or any information it contains, including pursuant to the Computer Misuse Act is computer/Solution and/or the information it contains, you are accepting any terms of us	ainst unauthorised use of, or 1990. If you are an authorised se, notices and policides which

**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, e.g. remaining in the office).

• Press F11 and remove your smartcard to: Lock the screen, Switch User or Shutdown the system.

7	Lock Out Security	×
Ľ		]
(Fr	Remember to remove your smart card if you are leaving this terminal. To unlock SystmOne, enter your smart card, enter your PIN and click Ok.	
	Di Shutdown New User	

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

# SystmOne Home Screen Navigation and Using Function Keys



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

SystmOne GP: Mrs Krupa Mashru ('Other' Community Health Service) at CWHHE Training - 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:



- Using the Main Menu allows you to navigate to the main functions available on SystmOne, this starts from 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.
- The example below displays the **Patient** Menu options:





• The example below displays the **Patient** Menu – **Patient Maintenance** with additional options.



- You will also notice in the menu options if there is a keyboard shortcut 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.

#### Toolbars

The big and small toolbars are located at the top of the screen below the Main Menu and are configurable:



- The buttons in the toolbar allows 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.
- 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 it's 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 have made.
  - Save Button Closes the current record saving the changes you have made to it.



- **Details Button** Record event details for the current consultation/event, e.g. date, time, location. The background colour of the icon on the **Details** button will change to indicate whether you are recording an administrative or 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.
- Panic Button This allows you to call for immediate assistance if required. When the panic button is triggered, a message is displayed on the screens of all of the users logged on at your organisation, informing them that you require immediate assistance. The message includes your name and PC Location (if you have entered it) and shows the time the panic button was triggered in the title bar.

#### **Recording your PC Location**

Recording your PC Location is crucial because it helps staff identify your exact location within a building if a panic button is pressed. This will ensure swift and accurate response in emergencies.

When you log into SystmOne you are asked to enter your PC location. Alternatively, you can go to the **System** Menu – **PC Settings** – Expand **Appointments** from the left hand side – **PC Location** – Enter **Location description** (e.g. Back Office).

#### SystmOne Online Help

To access online help, there are two options.

Make sure you have the latest version of the Help (if you do not, you will be prompted to update, click Yes).

• **Option 1** – Shift+F1 key launches the Help Browser so you can search for help files by using the Contents, Index, Search and 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 our NWL notices at the bottom left of your screen. They are used by TPP and NWL ICB to let



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** to the **Notice Archive** tab as shown below:

🝸 Notice Board		Х
Current Notices Notice Archive Documents		
✓ Hide read notices		
Posted By	<b>7</b> Prospective access post go-live survey	
13 Mar 2023 TPP	NHS England would like to hear about practices' experience in preparing for	
06 Mar 2023 TPP	and implementing the change to enable patient access to online health records.	
	Follow this link to complete the survey:	
	https://forms.office.com/Pages/ResponsePage.aspx?id=kp4VA8ZyI0umSq9Q	
	55Ctv08kRWQnMINCuBavj6rlFxdUQVdCTIdQQzZTSUdCUVIXTEQyTDNMWjB	
	QNC40	
	Posted Mon 13 Mar 2023 09:01 by TPP	
	Expires Wed 29 Mar 2023	
	Don't show again [Commen]	

- To view click on View All, once read, click on "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.

NWL ICB will utilise the notice board to share any important SystmOne notifications or downtime updates.

#### **To Do Buttons**

The To Do buttons are a list of relevant items in the active space that gives you a button to jump to that screen. You can re-click to hide.

They are at the top right of the screen reminding you of outstanding items (the number at the corner of the button shows how many of each are outstanding).

- If a square appears with a number number outstanding.
- Button's on display are Changes, Notify, Tasks, Forums, Appointments, etc.





#### Status Bar

The Status Bar is displayed at the foot of the screen regardless of which screen is currently on show.

If you hover over the counter, they will give you information on what the counter relates to, e.g. number of appointments waiting to be seen.

Search features	•		0	0	0	)	0	0	4	3	0	-8	0	0		) (	0	÷	0	0	0	ľ	7	7	0	Τ	<b>9</b>	ä		14	4:10
-----------------	---	--	---	---	---	---	---	---	---	---	---	----	---	---	--	-----	---	---	---	---	---	---	---	---	---	---	----------	---	--	----	------

- 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, e.g. Reports etc.
- There are icons for Pathology, Document Management, Appointments, Visits and Tasks and they display a number of counters (boxes containing statistics) next to them. **Double click** on the number to go straight into that section.

**NOTE**: The counters visible are tailored according to the type of organisation you belong to (e.g. General Practice, Child Health, Out of Hours).

# 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 (only available to system admin users) so ensure content is appropriate.

#### To Create and send an Instant Message:

- To send an instant message from the Main Menu, go to **User** and select **Messaging**.
  - ct User System Help Home F8 Cl Notifications ed in. New Notification... Ctri+E Messaging...
- The Messaging window will open showing the list of current staff 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.

ser ~	Role Rustom Administrator	User Last Logged On Location	Flags
Irs Krupa Mashru	'Other' Community Health Service	26 Jul 2023 92:47	
	7 Postpone Mes	sages U ×	
	26/07/2023	12:52	
	QK		



• Select the user you would like to send the message to and then select the **send message** button for the message window to appear and then write your message and **click** the **OK** button to send it

#### **Responding to Instant Messages:**

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

Message from Mrs Kr	upa Mashru at i	26 Jul 2023 12:	56
Hello			
Reply	Postpone	Dismiss	

Please remember that:

- If you **Postpone** a 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

# Retrieving a Test Patient

#### Option 1:

- 1. Within the SystmOne Home screen.
- 2. Bottom left of the screen is **Search Features** dialog box.
- 3. Type **Test**.
- 4. A red T with Test Patients beside it will appear.
- 5. Double Click on the Red T.
- 6. A list of Test Patients for the organisation will appear in Orange.

#### Option 2:

- 1. Go to the Reporting Menu.
- 2. Go down to Miscellaneous Reports.
- 3. Then go across to **Test Patients (Red T)**.

Click on **Test Patients** and this will retrieve a list of Test Patients for the organisation in Orange.

# **Quick Patient Search**

There is more than one way to locate a patient:

- 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 and then select **Quick Patient Search** from the list in the main menu. The Quick Search Screen is displayed:

٠	Lab Tests Online	+
	Test Patient Copying Tool	+
Т	Test Patients	+
test		



7 Quick Patient Search							
Name search [	] # 🦳	Search	History	This Address		Not Found	▼ Ad <u>v</u> anced
<u>S</u> ele	ct Ap	pointment	Consultation	Eavourite Screen	Close		

- The search covers all Patients who are currently registered or have ever been registered at your Organisation.
- **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 smi". This will give you many patients but to narrow the search type in more of the name.
- **Click** the Advanced button and select **Include Deducted Patient** to include Patients who have been registered at your Organisation in the past but are not receiving care at your organisation anymore. Deducted patients will appear greyed out and have an X in the information box.

🍸 Quick Pa	tient Search										×
Name search	smith		2	Search	<u>H</u> istory	This	Address	Not	Found	± Ad	vanced
✓ Include deducted patients ✓ Include test patients			st patients	Site All Sites					Ŧ	Columns & Set	tings
Date of bir	th			Include patients on	y registered for rem	ote booking	g 🗌 Search on	previous s	surnames		
NHS Number	First Name	Middle Names	Surname	DOB	Information A	Sex	House Name	House	Road		Postcode
	Bob	1	Smith	10 Aug 1940	×	M		91	Sunnyfiel	ld	
	000										NW7 4F
	Lena		Smith	01 Jan 1980	×	F		2	Longridg	e Lane	NW7 4F UB1 3JI
	Lena Aaron	J	Smith Smith	01 Jan 1980 22 Jun 1980	×	F M		2 50	Longridg Fitzhugh	e Lane Grove	NW7 4F UB1 3JI SW18 3

- **Test Patients** Each Unit has its own list of Test Patients which appear in orange text, which should be used by new staff to practice getting around the system or for testing out new functionality, **NEVER** use a live Patient Record to do this.
- **Click** the \_\_\_\_\_\_ button and it should return some results.

🍸 Quick Pat	ient Search								×
Name search	mith		2	Search	History	This Ag	dress Not Found	T T	Ad <u>v</u> anced
NHS Number	First Name	Middle Names	Surname 🗸	DOB	I House Name	House	Road	Postcode	Telephone
	Aaron		Smith	22 Jun 1980	M	50	Fitzhugh Grove	SW18 3SX	07552 56289
	Caroline		Smith	24 Dec 1986	F 12		Warwick Road	E15 4LA	07749 88886!
	John		Smith	01 Jan 1951	M		Exmoor Street	W10 6DZ	
	Lena		Smith	01 Jan 1980	F	2	Longridge Lane	UB1 3JH	07777 111222
	Linda		Smith	10 Feb 2017	F	1	Sunnyfield	NW7 4RE	07965 41238
9990533474	Mary	Ann	Smith	15 May 2019	F	10	Friston Street	SW6 3AT	07712 345678
	Peter		Smith	16 Mar 1990	M 26		School Road	CO12 5AZ	07462 665562
	Robert		Smith	15 Mar 1986	M The Chelsea.		Flood Walk	SW3 5RR	07856 600542
	Sam		Smith	01 Apr 2000	M			ZZ99 3VZ	07000 00123
	Sam	Oscar	Smith	01 Jul 1989	M Flat 4	220	Uphill Road	NW7 4RB	07500 00012:
	Sam		Smith	12 Oct 2016	M 10		Ampthill Square	NW1 2JR	07888 888888
	Sandy		Smith	01 May 2018	F		Phillimore Walk	W8 7RX	07890 356214
	Sarah		Smith	31 Mar 1987	F	120	Burnley Road	NW10 1EH	
	Test		Smith	12 Jun 1992	F	16	Orchard Street	W1H 6HQ	
	Tom		Smith	05 Oct 1999	M	16	Marylebone Road	NW1 5JD	020 3350 40
	Emma		Smith-TestP	01 Jul 1997	T F	722	Prince Of Wales Road	S9 4EU	00000000000

- Only the first 20 patients 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.
  - Black Permanent GMS patient.
  - **Green** Patient applied for GMS.



- **Red** Patient is a Walk-In patient, a Temporary Patient (TR) or requires Immediately Necessary Treatment (INT).
- **Blue** Remotely registered patient (patient registered at another Organisation who has a remote appointment boking 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 have found the patient you are looking for:
  - Click on the Patients name in the results screen and then you can **Double Click** or it or **Click** on the **Select** button to retrieve the record.

# Navigate Around the Patient Record

When a patient record is open, the patient details will display in the right hand corner known as the demographic box.



#### 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 patient 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 of 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.

  - 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.

#### Examples of Clinical Tree Nodes:

In this section we will review some nodes located on the Clinical tree. Kindly note your nodes may be in a different order or colour as trees are configurable.

#### **Patients Home Node**

- Select the Patients 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 clicking on them it will take you to either that Node or open up an additional window to view that information.
- Any Active tasks will also be visible on the Patient **Home** Node:

Chinical Administrative	Patient Home
Patiant Horns	E Configure
v 👁 Quick Glance	- II Seminders
Saleguarding	patient can be violent Cancel More
Safepuarding information (3)	This pt does not speak english Cancel More
E Special Notes (4)	Please inform the patient that if they cannot attend an appointment in the future they should inform staff so that it can be cancelled ASAP. Cancel More
Problem	test Cancal Merv
AL Problems (19)	Did not attend for Plu appointment with Prince Aladdin. Research the oxident that if they cannot strend an appointment in the future they should inform staff so that it can be cancelled \$248. Conside they
V E Maior Active Protesma (11)	Did not attend for Session appointment with Hannah Greenwood.
- Minor Active Problems (5)	Please inform the patient that if they cannot attend an appointment in the future they should inform staff so that it can be cancelled ABAP. Cancel More Did not attend for My care My way appointment with MY Femil Belvioku.
∽ ► inactive Problems (1)	Please inform the patient that if they cannot attend an appointment in the future they should inform staff so that it can be cancelled ASAP. Cancel More
V 🏲 Main hactive Problems	
V 🏲 Hinor Inactive Problems	Asthma - Asthony - Record review, personalised plan, assessment and number of exacerbations. All Million More
U MEDS Statements (10)	Secondary Prevention of Coronary Heart Disease - CHD005 - Consider CHD therapy Action More
P hattive Problems (1)	Diabetes - DM020 - Record IFGC-HbA1a Action More
- Journals -	- D Senomines & Alerceies
Tested Journal	PARACETAMOL capsules 500mg (ACTAVIS); made them feet ack: End. More
10 New Journal	NURCMIC, (all components considered allergens - Nuromoi Dual Action Pain Relief (200mg/500mg/tablets (Rectall Benckser Healthcare (UK) Ltd)) End More PARACETANOL, End More
Read Code Journal (248)	ABIDEC (all components considered allergens - Abidec Multivitamin drops (Omega Pharma Ltd)): ed rash on face End More
Summary & Family Hatory (10)	Presult to day dataset in take
Hadrader	Dust allergy more set
A Medication (17)	Dust allergy: Red rankes over the body lifere
IP Report Terminies (5)	Dusting poweders altergy More Historie dust mile Marzy More
Second values & Alexandra (13)	Dust allergy More
El Maderatico Summary	Cut areny tools
Prescription Bequests (2)	- A Patient Status Alerts
Prescription Bistory (58)	PULL RECORD ACCESS: Sensitive/3rd party information visible to patient online unless reducted More
	Platens on AUC influence windout reasons or evaluation even to service and reasons production in two or Service policies sum level for the evaluation of the evaluation o
E Communications I Lantons 115	COF-Asthmatic Action More
Control Campion a Control (14)	+ D Table 197
The function of the first (14)	
- House Call	- 4 Recalls

#### Journal Types:

There are two Journals: New Journal and Tabbed Journal.

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



Clinical Administrative	New Journal	
🔓 Patient Home	Searching in the journal shows results after any applied lifeting. This does not include results from consultations in collapsed admissions. The search bis only searches on patient data currently visible in the journal. This message can be hidden by going to User > Lear Preferences > Patie New Journal and Gataling The Show search warming deck bis.	nt Record >
V 👁 Quick Glance		
Safeguarding Information (3)		
Special Notes (4)		
- Problems	The 20 Apt 2023 11:31 - Surgery it is Knopp Mashinu (Other Community Health Senace) [2]	a .
All Problems (19)	ie Sone Broad (UsakW), difficulty availabeling E-120/ (Altimoted SV), Prometein Le I-semparateure (UsBroA) SR (sen).	
V Rajor Active Problems (13)	D: inflamed foreillaus P: Follow unit of weeks P: Follow unit of weeks	
V 🗮 Minor Active Problems (5)	Minor: Infective pharyngins (XaDuG) (New Episode)	
A hactive Problems (1)	Annoucillin 256mg capsules - 15 capsule - 15ke one 3 limes/day	
🕶 🎠 Major Inactive Problems	Printice parameters (2000G)	
Y 🏷 Minor inactive Problems		
HED3 Statements (10)	The 90 day 2003 11 (4), Support Direct Hoddin	
Y 🏲 Inactive Problems (1)	PAL Didn't afford readings, much measure and the Prince Aladdin.	
Journaia	Did not attend (%atkG)	
Tabbed Journal	If Reminder/Wet: Did not attend for Fisu appointment with Prince Aladdin. Please information and and the Alagonistic associational in the future back should inform staff on that if can be cancelled #SAP - Plinetry Normal	
🗐 New Journal		

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.

#### Tabs in the Tabbed Journal

<u>Tab</u>	Description
Local Data	Shows data added by the current organisation
GP Data	Shows data added by SystmOne GP organisations
Community	Shows data added by SystmOne community
	organisations
Urgent Care	Shows data added by SystmOne urgent care
	organisations
Everything	Shows all data available to the current organisation

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

Clinical Administrative	Tabbed Journal	D
🚨 Patient Home	Bachting in the journal shows results after any applied filtering. This does not include results from consultations in collapsed admissions. The search tox only searches on patient data currently visible in the journal. This message can be hidden by going to User > User Preferences > Here Journal and admits the 'town executivation' of the search tox only searches on patient data currently visible in the journal. This message can be hidden by going to User > User Preferences > Here Journal and admits the 'town executivation' of the search tox only searches on patient data currently visible in the journal. This message can be hidden by going to User > User Preferences >	Patient Record >
🗸 👁 Quick Glance		
Safeguarding		
Safeguarding Information (3)	rove previous i originaria i originaria i custanti Li	
Special Notes (4)		-
Problems	105 Jul 2022 11:37 - Surgery: Mrs Krupa Mashru (Other Community Health Service) kui Brokew (Chahes mailtins (Chah) 9	lQ .
All Problems (19)	H: See Breal (AsSM)	
V Rajor Active Problems (13)	e: tal comming P; follow up 2 weeks	
Minor Active Problems (5)	Major. Diabeles melliflus (C10.) (Hew Episode)	
∧ ► Inactive Problems (1)	Uusing powers awry (uson4) Amoidillin 250m capsules - 15 capsule - take one 3 timesiday	
🗸 🏲 Major Inactive Problems	FP10. Not Yet Printed	
Y 🏲 Minor Inactive Problems	Request for /Addinium bromide 375micrograms/dose dry powder inhaler by patient Extended to a state of the st	
UED3 Statements (10)		
Inactive Problems (1)		
Journals	07.Jul 2022 08:50-Surgery Bella Deauly FIN DI did at dated for Sassion anonintment with Relia Result/	×a
Tabbed Journal	Did not attend (Xa1kG)	
🗐 New Journal	ReminderMert Did not attend for Session appointment with Bella Beauty.     Beans different two solider that of the concern did and in the Attended in the	
III Read Code Journal (348)	r rease month are parent was in any seminal electric an appointment in the source any private month source or as in cash de Californiad ASM*, * Priorig, Horman	

#### 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 the 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).

Custom Filter	Ŧ
Custom Filter	
Clinically Relevant	
Admin Events	
Online Full Clinical Record	
Online Detailed Coded Record	



- **Online Full Clinical Record** Consists of coded entries plus communications, letters and free text from the date requested for your organisation only seen in the New Journal.
- **Online Detailed Coded Record** Consists of coded entries from the beginning of the record for your organisation only seen in the New Journal.

#### **Communications & Letters Node:**

This shows 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.

Communication	ns & Letters						
🗅 🗐 🚆 🏹 🖻	i 🖉   🍕 🗐 🥒 📋   🗌			Drag Word File Here to Create L	etter		
Filter Simple Advance	d Q	- 📩 Q					
All (19) Incoming (	1) Outgoing (16) Other (2)						
Date ~	Туре	Date Finalised	Sender	Recipient	Information	Flags	
20 Feb 2018	Clinic Letter	20 Feb 2018 14:03			Entered by: Phillip Martin	_₹	
19 Jul 2018 12:20	A&E	19 Jul 2018 12:45	CWHHE Training	Mr Ozzie Martin	Letter Template: HPA Notification Form.doc	<u> </u>	
26 Aug 2021 10:48	Referral		CWHHE Training	Referral form for CLCH Dieticians Service (Email), Community Services	Letter Template: Oviva NWL DSE Programme Service Referral Form	<b>1</b>	
14 Oct 2021 10:27	Letter to Patients	14 Oct 2021 10:54	CWHHE Training	Mr Ozzie Martin	Letter Template: Patient.doc		
11 Nov 2021 10:27	Letter to Patients	11 Nov 2021 10:51	CWHHE Training	Mr Ozzie Martin	Letter Template: Patient.doc		
07 Dec 2021 11:05	Letter to Patients	07 Dec 2021 11:32	CWHHE Training	Mr Ozzie Martin	Letter Template: Patient Fit to Fly.doc		
22 Dec 2021 11:40	Referral Letter	22 Dec 2021 12:04	CWHHE Training		Letter Template: To Whom it May Concern		
20 Jan 2022 10:30	Letter to Patients	20 Jan 2022 10:58	CWHHE Training	Mr Ozzie Martin	Letter Template: Patient.doc		
22 Mar 2022 09:00	A&E	23 Mar 2022 11:05	CWHHE Training	Ealing Community Transport ECT membership registration, Transport Forms	Letter Template: AUA ES Patient Infomation lette HW r1 A-H	r <u>\</u>	
23 Jun 2022 11:27	A&E	23 Jun 2022 11:57	CWHHE Training	Dermatology - Community (eRS Form), Hounslow, Dermatology	Letter Template: Dermatology referral form NWL ICS	<u> </u>	
23 Jun 2022 11:27	Letter to Patients		CWHHE Training	Mr Ozzie Martin	Letter Template: Blank letter head		
13 Jan 2023 15:06	Referral Letter	13 Jan 2023 15:12	CWHHE Training		Letter Template: Patient.doc	<u> </u>	

- To view only your organisation 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.

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#### Examples of Administrative Tree Nodes:

In this section we will review some nodes located on the administrative tree.

#### Patient 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 Detail	s			
Patient Details	NHS number		Old NHS number		
Patient Details	Title	Miss -			Amend Name
✔ 🕞 Hospital Numbers	Name	Minnie		Mouse	
GP Registration Details	Former surname				
Record Sharing	Known as				
Sroups & Relationships (1)	Gender	Female 👻			
Address History (1)	Date of birth	22 Oct 2010 🔻 00:00	Age 12 y 7 m		
Medication	Place of birth	UNKNOWN			
∧ 秩 Appointments, Visits & Tasks	Address	2 Woodcote Road		Residential institute	
Attendance Counts		Wallington Surrey Sillo ULY		Record New Addr	ess
Appointments	Home telephone		Work telephone		C Record Contact Details
Appointment Invitations	Alternate tel.		Mobile telephone		
🚺 Visits	Email			North Sen	d Email 📷 Send Verification Email
🖆 Tasks	Skype ID		🛜 Skype Audio Call		
Scheduled Tasks	Contact method	Unknown	Record Contact Method		
+ eWorkflows	Marital status	Married (XE0oa)	- 🖄 Record	Marital Status	
Waiting Lists	Ethnicity		- Record	Ethnicity	
SMS Messages	Occupation	Employed	i Record	Occupation	

#### **Appointments/Visits/Tasks Node:**

This section is designed to facilitate the scheduling of appointments, coordination of visits and delegation of tasks, ensuring that clinical and administrative duties are effectively managed and tracked to support seamless care by allowing you to view details of the following:

- Attendance counts
- Appointments
- Visits
- Tasks
- Scheduled Tasks
- Waiting Lists and Therapy Groups

Clinical Administrative -=	Appointments, Visi	ts & Tas	ks							
Patient Details	Appointment Attendance   Appointments   Appointment Invitations   Visits   Tasks   Scheduled Tasks   Workflows   Waiting Lists & Therapy Groups									
Patient Details	Attendance over the last	Attendance over the last twelve months								
🗸 🔓 Hospital Numbers	Appointments	46								
GP Registration Details	Successful attendances	24	52.2	%						
Record Sharing	DNAs	22	47.8	%						
Groups & Relationships (3)	Walked out	0	0	%						
Address History (1)	Visits	6								
Medication	Total Attendance									
∧ 🔅 Appointments, Visits & Tasks	Appointments	98								
Attendance Counts	Successful attendances	46	46.9	%						
🎎 Appointments	DNAs	52	53.1	%						
Appointment Invitations	Walked Out	0	0	%						
🚯 Visits	Visits	9								
Zasks										

**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 access their record. The patient will be asked to give their record sharing consent at ach organisation at which they receive care. The patient's consent can be changed at any time.

Home Search Task Disc C II F II I	ard Save Details	Record Sharing     ANDERSON, Anna (Ms)     Born 01.Feb.1934 (90y) Gender Female NHS No. 999 050 1831	Ms Anna Anderson 01 Feb 1934 (90 y) F 16 Chaplin Road, Wembley HA0 4UZ Ioblie (preferred): 07825 256955 Home: 020 8315 4842 99 050 1831 GMS, CWHHE Training, Test Pharmacy	
Start Consultation Next Event Det Dinical Administrative	ais Pathology Drawing Record Sharing	Organisation         CWHHE Training           Consert privid started         17-0-62-2017           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 organisation that accesses their record.           The patient will be asked to give hear record sharing consent at each organisation at which they receive care.           The patient will be asked to give hear record sharing consent at each organisation at which they receive care.	≇ @ d # V ≅  ▲	
<ul> <li>Patient Details</li> <li>Hospital Numbers</li> <li>Historical Hospital Numbers</li> <li>GP Registration Details</li> </ul>	Organisation Y CLCH MIU Training unit CWHHE Out of Hours ur CWHHE Out of Hours ur CWHHE Out of Hours ur	Sharing Out Does the patient consent to the sharing of data recorded here with any other organisations that may care for the patient?  Yes - share data with other organisations No - do not share any data recorded here	rt End Consent FL Jul 2014 24 Jul 2014 Yes Nov 2014 22 Nov 2014 Not asked - Record shared Jan 2015 15 Jan 2015 Not asked - Record shared Mar 2015 06 Mar 2015 Not asked - Record shared	3F 3
Record Sharing     Groups & Relationships (7)     Address History (4)     Necisation	CWHHE Out of Hours un CWHHE Training CWHHE Training CWHHE Training CWHHE Training	○ Consent not asked Sharing In	May 2016 21 May 2016 Not asked - Record shared Feb 2016 03 May 20 No 7 May 20 18 May 20 No 8 May 20 19 May 20 No 8 Jun 2016 02 Jun 2016 No 8 Jun 2016 02 Jun 2016 No 8	a) B
Appointments, Visits & Tasks     Attendance Counts     Appointments	CWHHE Training CWHHE Training CWHHE Training 19 Episodes of care	Does the patient consent to the viewing of data by this organisation that is recorded at other care services that may care for the patient where the patient has agreed to make the data shareable? Consent given Consent refused	Jun 2016 15 Jun 2016 No Jun 2016 11 Jul 2016 No Jul 2016 25 Aug 2016 No	- <u>111</u>
Appointment invitations (3)	Organisation → CLCH MIU Training unit CWHHE Out of Hours ur CWHHE Training TIT Urgent Care PCC	Orsent not asked Data Source OK Cancel	Consent F 4 Ves Not asked - Record shared Yes	

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

#### **Quick Notes**

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 on your toolbar.

- To Record a Quick Note:
  - $\circ \quad \text{Retrieve the Patient Record.}$

0	Click on the toolbar.											
	Y Quick Note X											
	Other Details Exact date & time 🔻 Thu 06 Jul 2023 💌 11:58											
	Changing the consultation date will affect all other data entered. To avoid this, cancel and press the 'Next' buttor											
	O Leave clinical relevance unchanged O Make this event clinically relevant  Make this an admin event Text Presets											
	Enter your Quick Note here											
	Qk Cancel											

- $\circ$   $\;$  Ensure the Date & Time of the event are set appropriately.
- Specify if event is Clinically Relevant or Admin Event.
- $\circ$  ~ 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 are unable to report on them. 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.

# Book and Manage Appointments

There are two options to see appointments, the **Appointment Overview** and the **Appointment Ledger**, which 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.



#### Appointment Ledger

AM PN Day <u>N</u> e To	ggle History Appointment Search Free Slot Sear	ch Settings Print Rotas/Labels Refresh				
Minimise Past Rotas	(Tomorrow) Thu 09 Jan	(Torrorrow) Thu 09 Jan	(Tomorrow) Thu 09 Jan			
Jan 2025 🔻 🌖 🗧	PAL	F Beyloku	HG			
08:30 * to 20:30 *	Flu clinic for Prince Aladdin	Early afternoon session	Hannah's Rota			
	Flu	Session	Session			
M T W T F S S	09:00 fu	13:00 Slot	09:00 same day emergency			
30 31 1 2 3 4 5	10m	10m	10m			
6 7 <mark>8 9</mark> 10 11 12	09:10 Mr Aaron Smith 22 Jun 1980	13:10 Mrs Wary Ann Smith 15 May 2019	09:10 same day emergency			
13 14 15 16 17 18 19	10m Flu vaccine	10m chest pain	10m			
20 21 22 23 24 25 26	0920 fu	1320 Ms Anna Anderson 01 Feb 1934	09:20 same day emergency			
27 28 29 30 31 1 2	10m	10m rash on elbow	10m			
3 4_5 6 7 8 9	0930 fu	13:30 Slot	09:30 same day emergency			
10 11 12 3 4 15 16	10m	10m	10m			
Bookmarks	09:40 fu	13:40 Slot	09:40 same day emergency			
	10m	10m	10m			
GP1 ▼ Q	0950 fu	13:50 Slot	0950 same day emergency			
Add Remove	10m	10m	10m			

Filter options on your Appointments Overview/Ledger screens:

AM PM	То	ggle I								
Minimise	Past Ro	tas								
Jul 2023	- 🔫		E							
08:30 🔻	-									
M T W T	T F	s X	s X	09:00 10m						
3 4 5 10 11 12	6 7 13 14	8 15	9 16	09:10 10m						
17 18 19 Bookmarks	23	09:20 10m								
	- Q									
Add	Remo	ve		09:40 10m						
Site	- Contai		4	09:50 10m						
All Sites		Ŧ		10:00 10m						
Show of Staff	ther site	s		10:10 10m						
				10:20 10m						
		10:30 10m								
PAL				10:40 10m						
I Beale				10:50						

- 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 dates on 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 the 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 of the days you want to view or hold down the Ctrl key and Click the mouse to select the individual days.
   NOTE: Bank holidays and closed days are indicated on the calendar by a green square (to see 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 User's view, and the function of each button is detailed below:
  - **AM** Restrict the view displayed to the morning only.
  - $\circ$  **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 select 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/Appointments Ledger

To Book an Appointment for a Patient:

- Do one of the following:
  - Select Appointments Appointment 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 T	oggle History Appointment Search Free Slot Sea	rch Settings Print Rotas/Labels Refresh				
Minimise Past Rotas	PAL	F Beyioku	S Gil	HG		
Jul 2023 🔻 🛞 🗲	Mon 10 Jul	Mon 10 Jul	Mon 10 Jul	Mon 10 Jul		
08:30 ¥ to 20:30 ¥	Aladins Dietitian Rota (AM) Session	Femi Beyioku GP My care My way	Sandip Health Check Session Health Check	Hannah's Rota Session		
M T W T F S S	09:00 Slot 60m	08:30 Private Medical 20m	09:30 Telephone Appointment Slot 10m	09:00 same day emergency 10m		
3 4 5 6 7 8 1 10 11 12 13 14 15 1	10:00 Slot 80m	08:50 Home Visit 30m	09:40 Test Sandip 10m	09:10 same day emergency 10m		
17 18 19 20 21 22 2 Bookmarks	3 11:00 Slot 60m	09:20 MDT 20m	09:50 Test Sandip 10m	09:20 same day emergency 10m		
- Q	12:00 Slot 60m	09:40 Same Day Embargo 10m	10:00 Test Sandip 10m	09:30 same day emergency 10m		
Add Remove	13:00 Slot 60m	09:50 NHS Health Check / CVD at Risk 10m	10:10 1 Day 10:00 TEST EMBARGO 10m	09:40 same day emergency 10m		
Site		10:00 NHS Health Check / CVD at Risk 10m	10:20 1 Day 10:00 TEST EMBARGO 10m	09:50 same day emergency 10m		
All Sites 👻		10:10 NHS Health Check / CVD at Risk 10m	10:30 1 Day 10:00 TEST EMBARGO 10m	10:00 same day emergency 10m		
Show other sites		10:20 NHS Health Check / CVD at Risk 10m	10:40 Blocked 20m	10:10 same day emergency 10m		
		10:30 NHS Health Check / CVD at Risk 10m	11:00 Slot 10m	10:20 same day emergency 10m		
		10:40 NHS Health Check / CVD at Risk 10m	11:10 Slot 10m	10:30 same day emergency 10m		
PAL		10:50 NHS Health Check / CVD at Risk 10m	11:20 Telephone Appointment Slot 10m	10:40 same day emergency 10m		

- Do one of the following:
  - o Right Click on an appropriate empty slot type and select Book Appointment,
  - 0 **OR**
  - Select an appropriate empty slot type and press Enter.
  - This will open the **Appointments Patient Search** dialog, type the patient name in the **Name search** field 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**:

🍸 Book N	ew Appointment						×				
Appointmen	nt Recurrence Attendees					Reminders:					
Date	Wed 19 Jul 2023 🔻				Template	Please inform the patient that if they cannot attend an					
Time	09:50 👻	Duration C	urrent: 10 mins	*		appointment in the future they should inform staff so that it can be cancelled ASAP. (Jul 2023 done by: Unknown)					
Staff	🔍 Mr Femi Beyioku					Cancel Mark in Error					
Patient	Mr Ozzie Martin 29 Sep 1978	3			Attendance	Greenwood.					
Mobile no.	07958 752740	Send	d confirmation now		Phone/E-mail	Please inform the patient that if they cannot attend an appointment in the future they should inform staff so that it can					
Status	Booked			-		be cancelled ASAP. (Jul 2023 done by: ST)					
Purpose	Q			-		Cancel Mark in Error test (Apr 2023 done by: Mil					
Reason	Q			Ŧ		Cancel Mark in Error					
Details	Details					patient can be violent (Jul 2021 done by: SG) Cancel Mark in Error					
					Recurring	This pt does not speak english (Mar 2022 done by: SG)					
	_					Cancel Mark in Error					
Flags	Annual Review		Online Servi	ces Appoi	Other Appointments:						
	Interpreter Required		Prevent Self	Check-In							
	Interpreter Booked	•	SMS DNA Me	essage Se	ent	Aladdin - Flu (Booked)					
	Blood Test		SMS Remino	der Sent		Other Visite					
						Thu 22 Feb 2018 13:30 Prince Aladdin assigned (Pending)					
						Wed 16 May 2018 11:45 Mr Simon Benge assigned (Pending)					
						Wed 18 Jul 2018 10:10 Prince Aladdin assigned (Pending) Fri 10 Feb 2023 15:00 Mrs Krupa Mashru assigned (Pending)					
	Print appointment letter/labe	I.	Print appointment lett	er using Int	egrated Word						
			E-mail appointment le	tter using Ir	ntegrated Word	QOF Alerts: Asthma - AST007 - Record review, personalised plan					
			Show preview of ap	pointment le	etter	assessment and number of exacerbations					
			(	<u>0</u> k	Cancel	Connelses Baurration of Connels Used Discose OUD065					

**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.
  - $\circ$   $\;$  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 the drop down list of 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 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 the 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:

🍸 Free Slot Search									×
Staff Filter       Image: Prince Aladdin       Prince Aladdin       PAL       Pala       Pala		Day Monday Tuesday Wednesday Thursday Friday Saturday Site	Date & Time       ☑ Monday       ☑ Tuesday       ☑ Wednesday       ☑ Wednesday       ☑ Friday       ☑ Saturday       ☑ Sunday       ☑ Sunday       ☑ State       ☑ Combine slots to get duration       State		Rota Type Filter Baby Clinic Clare Coral Test Olabetes Clinic Diabetes Clinic Diabete Clinic GP Diabetic Clinic GP Diabetic Clinic CP Diabetic Clinic CP		Slot Type Filter THIS111/CCAS 1052022 Sandip admin - not book. Admin Blocked Baby Clinic Blocked dmin Clinic Z		AS ndip pok. d n (
10000		CWHHE Trainin	g	<b>*</b>					
Staff Member Mr Ferri Bevioku	Rota Type	Rota Name	assion	Slot	Day	Earliest Date ~	Days	Duration	Total F
Aa Charles	Flu	session in	6331011	Flu		20 Jul 2023 14:10	1	10	10
Ms Sharon Twydell	Training Clinic	ST Training sess	sion	Telephone Appointment Slot	Thu	20 Jul 2023 08:30	1	10	4
Bella Beauty	Flu	Flu JP		Flu JP	Thu	20 Jul 2023 08:30	1	10	12
Mr Femi Bevioku	My care My way	Femi Bevioku GF		Private Medical	Thu	20 Jul 2023 08:30	1	20	1
Ms Sharon Twydell	Training Clinic	ST Training sess	sion	On-line Booked	Thu	20 Jul 2023 08:50	1	10	2
Mr Femi Bevioku	My care My way	Femi Bevioku GF		Home Visit	Thu	20 Jul 2023 08:50	1	30	1
Prince Aladdin	Flu	Flu clinic for Prin Aladdin	ce	flu	Thu	20 Jul 2023 09:00	1	10	21
Hannah Greenwood	Session	Hannah's Rota		same day emergency	Thu	20 Jul 2023 09:00	1	10	12
Ms Sharon Twydell	Training Clinic	ST Training sess	sion	Slot	Thu	20 Jul 2023 09:10	1	10	9
Mr Femi Beyioku	My care My way	Femi Beyloku GF	•	MDT	Thu	20 Jul 2023 09:20	1	20	1
Ms Sharon Twydell	Training Clinic	ST Training sess	sion	On The Day	Thu	20 Jul 2023 09:50	1	10	2
Mr Femi Beyioku	My care My way	Femi Beyioku GF	·	NHS Health Check / CVD at Risk	Thu	20 Jul 2023 09:50	1	10	10
35 Slots found					_				
Other Options									
Link to appointment 0 🌲	Days 🔻 Link								
		Book	Zoom to F	Rota Refresh <u>C</u> lose					

- Select the appropriate details in the top half of the screen you want to view for, such as staff members, days, rota type, slot types, sites, etc.
- If the patients require 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 search 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 Type		Rota Name Farly affection			Slot	. Dey	Earliest Date V	Days	Duration	Total F.
Mr Femi Beyloku	Session				ssion	Slot	Wed	19 Jul 2023 14:10	0	10	12
Aa Charles	Flu	0	Book Appointment			Flu	Thu	20 Jul 2023 08:30	1	10	10
Ms Sharon Twydell	Training	-	Book from Walting List	sic	n:	Telephone Appointment Slot	Thu	20 Jul 2023 08:30	1	10	4
Bella Beauty	Flu	-	Book Remote Appointment		- 1	Flu JP	Thu	20 Jul 2023 08:30	1	10	12
Mr Femi Beyloku	My care	0		P here		Private Medical	Thu	20 Jul 2023 08:30	1	20	1
Ms Sharon Twydell	Training	ibl	Book Textual Appointme	int sio	n	On-line Booked	Thu	20 Jul 2023 08:50	1	10	2
Mr Ferni Beyloku	My care	5-	Rebook Accointment	P	202 	Home Visit	Thu	20 Jul 2023 08:50	1	30	1
Prince Aladdin	Flu		onther other minder	108		flu	Thu	20 Jul 2023 09:00	1	10	21
Hannah Greenwood	Session	•	Block Appointment Amend Slot			same day emergency	Thu	20 Jul 2023 09:00	1	10	12
Ms Sharon Twydell	Training	1		sig	n	Slot	Thu	20 Jul 2023 09:10	1	10	9
Mr Femi Beyloku	My care	0		P	1.1	MDT	Thu	20 Jul 2023 09:20	1	20	1
Ms Sharon Twydell	Training	4	Zoom to Hota	Bio	n	On The Day	Thu	20 Jul 2023 09:50	1	10	2
Mr Ferni Beyloku	My care	ø	Amend Rota	P	0.	NHS Health Check / CVD at Risk	Thu	20 Jul 2023 09:50	1	10	10
35 Slots found		100	Table	>	-		-				

- **Right click** to book a slot and find the patient.
- If the earliest slot is acceptable then continue to book the 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 clicking 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 and 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:

Question		×
?	Do you want to rebook the appointment or store it for later rebooking?	
	Rebook Now         Rebook Later         Don't Rebook         Cancel	

- Rebook Now Details of the original appointment are displayed in a small window at the foot of the screen as a reminder. Navigate to a suitable appointment slot on your 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 jut booked. It will not show in bold on other user's 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.

#### Tasks

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

- They can be linked to a Patient Record and therefore a 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 type 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 in **Miscellaneous**.

#### How do I access my Tasks?

• Left click on the Tasks button from your To Do buttons on your Home Screen:

13 Changes	Notify	12 Tasks	Forums	Appts	Visits	Path	Scan	
Make this view th	e default							🖆 Task List
Assigned to Me					Count Unassig	gned		Count
Overdue					Overdu	16		
Due Today					Due To	oday		
Due Tomorrow					Due To	omorrow		
EDI Validation Err	or				6			
Medication Reque	st				6			
Total					12			

Your own Tasks appear under the Assigned to me heading:

In the example above this staff member has 12 current tasks to deal with, none of them Overdue, Due Today or Tomorrow.

- **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 vi	Akke this view the default											
Updated	Patient				Status	Due Date V	Started	Flags				
16 Mar 2023	Mr Ozzie Martin				Not Started			PJ				
01 Jul 2019	Mr Phil Mitchell		Action		Not Started			P -				
11 Mar 2021	Mr Mickey Mouse	obľ	llodate		Not Started			P 🦊				
17 Feb 2022	Mrs Gail Platt	001	opoare		Started		$\checkmark$	P J				
09 Nov 2021	Mrs Jessica Rabbit	Q	Retrieve Patient		Not Started			P 🦊				
27 Jun 2023	Mr Harry Smith	5	Change Status	>	Not Started			P J				
6 Tasks		?	Assign	>								
Thu 16 Mar 1 A GP to HA ar	0:54 - Sent automatically by SystmOne nendment notification message is waiting to be se	۲	Set Flag	>	annot be sent because:							
You are not li	nked to Unknown HA HA.	۰	Print Task									
Either correct	the HA selected, or contact your helpdesk to reques		Create Rule									
Correct the er	ror and the message will be sent automatically.		Table	>								

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

#### How do I know if I have a New Task?

The counter on your Status bar on the Home screen will have increased.



• When you double click on the counter it will take you to the task list screen.

#### 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.

13 VE Tasks	Forums	Appts	<b>Visits</b>	Path	ے۔ Scan				
							🖆 Task List		
	Count Unassigned								
			Overd	ue					
			Due T	oday					
			Due T	omorrow					
			6						
			6						
			1						
			13						

• Alternatively select Workflow – Task List from the Main Menu or Ctrl+T on the keyboard.

The Task List is split into three sections:

- Tasks Tree
- Task List Pane
- Details Pane

All Tasks Summary Mrs Krupa Mashru							
All Tasks	🗆 🖹 🙆 🖉 🗌	ob] 🖏 🛛 🖓 🖛	🌾 🔹 💼 Enter text to search 🔹 🗙				
V Y All Open Tasks (3296)	Updated V By	For	Patient	Task	Status	Due Date	Started Flags
Unassigned Tasks	14 Apr 2018	Administration		Rota Auto-Apply Results	Not Started		
<ul> <li>Assigned to Groups (987)</li> </ul>	15 Apr 2018	S Benge		Privacy Officer Summary	Not Started		- P J 🛛
<ul> <li>Assigned to Teams</li> </ul>	18 Apr 2018 CG	BU	Miss Blackburn Clare	Email Verification Failure	Started		
<ul> <li>Assigned to Staff (2312)</li> </ul>	18 Apr 2018 CG	BU	Miss Blackburn Clare	Email Verification Failure	Not Started		ΠP
By Status (3296)	18 Apr 2018 CG	BU	Miss Blackburn Clare	Email Verification Failure	Not Started		
Tasks from Elsewhere (2)	18 Apr 2018 CG	BU	Mr Oscar Brown	Email Verification Failure	Started		
A Fiters	18 Apr 2018 IC	BU	Miss Zena Sofroniou	See task and action as appropriate	Not Started		
<ul> <li>For Me, My Groups and My Teams (13)</li> </ul>	18 Apr 2018 PC	BU	Mr Quentin Brown	See task and action as appropriate	Started		
<ul> <li>EDI Validation Error (6)</li> </ul>	18 Apr 2018 BU	BU	Miss Mary Brown	Email Verification Failure	Not Started		ΠP
<ul> <li>Medication Request (6)</li> </ul>	18 Apr 2018	AU	Miss Mary Brown	EDI Validation Error	Not Started		
+ Referrals (1)	18 Apr 2018 BU	BU		See task and action as appropriate	Not Started		
V For Only Me (13)	19 Apr 2018	IB	Mr Sam Vimes	EDI Validation Error	Not Started		
V Due Today	3296 Tasks	Advantationedica		Data Jula Janlu Daaulla	Mat Clarked		
V Due Tomorrow							
V 🗊 Overdue	Thu 14 Jul 13:24 - M	Ir Andrew Henge					
Created By Me (15)	phone patient re res	ults					
Current Patient							
Content ration							

#### Tasks Tree

The Tasks tree displayed in the left-hand pane of the screen lets you view separate lists of tasks contained in the following folders:

- All Tasks
- Filters

#### All Tasks

This folder contains a breakdown of all tasks received by users in your organisation. Click the arrow to view the sub-folders that break down the tasks in a relevant way, e.g. by task type, user group, staff member.

The following folders are available on the left of the screen:

<u>Folder</u>	Description	
All Open Tasks	All tasks received by users in your organisation that have not yet been	
	completed.	
Unassigned	Tasks that have not been assigned to a specific member of staff or group.	
Tasks		
Assigned to	Tasks assigned to all members of a user group.	
Groups		
Assigned to	Tasks assigned to individual staff members (each member has a separate	
Staff	sub-folder).	
By Status	When you click the arrow, tasks are grouped into sub-folders according to	
	their current status.	
Tasks from	Tasks assigned to staff in your organisation by users at another	
Everywhere	organisation. These tasks always have an 🞴 icon displayed in the Flags	
	column of the Task List pane.	

#### Filters

This folder helps you to find out which tasks are for your personal attention. The tasks listed include tasks sent to users within your organisation, either from other organisations or by another user within your organisation.

The following filters are available:

Filter	Description	
For Me	The number of tasks assigned to you, including tasks assigned to user	
	groups of which you are a member.	
For Only Me	The tasks that are assigned to you alone, not including tasks assigned to	
	user groups of which you are a member.	
Due Today	Tasks with a due date of today.	
Due Tomorrow	Tasks with a due date of tomorrow.	
Overdue	Tasks that were due yesterday or before.	
Created By Me	All the tasks you have created.	
	Note: Only tasks sent to users within your organisation are displayed.	
Current Patient	tient If you have a patient record open, any of the open task relating to that	
	patient are listed.	

# **Creating a Task**

Do one of the following:

- Select Workflow New Task from the Main Menu.
- OR
  - **Click** the **Click**
- Creating a task from the Task window:

🍸 New Task	- 🗆 X
<u>Qk</u> <u>Apply Template</u> <u>Cancel</u>	
For CWHHE Training Settings Include past organisations Click or Drag Files Here to Attach File Name	O Unassigned     Ouser group     Team     Staff member     Prince Aladdin     Visual OP     Registered GP     Sender     Usual OF
0 Attachments Task Referrals ▼ Subject ● No Subject B I U & Fa W 2 2 45 SansSerif	<ul> <li>○ Auuppe starr</li> <li>○ Current Patient</li> <li>12 * ■ * ■ = = = 年 年 ■ </li> </ul>
	Enter Task body
Status Not Started	✓ Flag P No flag ▼ Presets

- Select the organisation the task recipient belongs to from the **For** drop down list. You can only send tasks outside your own organisation if the patient record has been shared by the other organisation.
- Select one of the following:
  - **Unassigned** the task will appear under "Unassigned Tasks" on the bottom of the Home screen for everyone in the organisation. If possible, always try to assign a task to a specific person or group; otherwise the task could be overlooked.
  - User Group select the appropriate user group from the drop down list, e.g.
     Reception. To check who belongs to the selected user group, click Members to view the names.
  - Staff Member click Usual GP, Registered GP or select the appropriate entry from the drop-down list (any users currently on leave are highlighted in bright *pink* text with "On Leave" after their name).
  - **Me** send the task to yourself.
  - **Multiple Staff** this allows you to select more than one member of staff from the list using the Ctrl key on the keyboard.
- Select a task type from the **Task** drop down list.
- Specify whether the task relates to a specific patient. If you have a patient record open, the name of the patient will be displayed beside **No Subject** with the radio button next to the patient's name selected.
  - When you send the task, the task details will be saved in the open patient record. If you do not want the task to be saved in the open patient record, select **No Subject**.
- If you are sending the task to a group, select **All recipients must complete** to specify that the task must remain on the Task List screen until all recipients have marked the task as "Completed".
- Type details of the task in the lower half of the dialog. The toolbar allows you to use standard Word processing functions to format the text.
- Check the task status (it will show **Not Started** automatically). To change the status of the task, select the appropriate option from the **Status** drop down list.



- Select the appropriate date from the **Due** mini calendar, if you want the task to be completed by a specific date. To specify a time, click in the box to the right of the **Due** field and type the appropriate time, using the 24-hour clock. A task is displayed in *red* type on the Task List screen when it is overdue.
- Select the appropriate option from the Flag drop down list if you want to assign a flag to the task.
- Click **OK** and the task will be sent to the recipient.

**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.

#### Updating a Task

- Select the task from the Task List and click  $\ensuremath{\,^{\mathrm{obJ}}}$  , or
- Right click on the task in the Task List and select **Update.**
- Make the relevant changes to the task, e.g. assign a new recipient, enter text or change the task status.
- Click OK.

#### View Tasks in Patient Record

To view details of appointments a patient has from the patient record:

- 1. Retrieve the Patient Record.
- 2. Select the Administrative tree
- 3. Expand the **Appointments**, Visits & Tasks node.
- 4. Select the Tasks node.

This view shows all of the tasks associated with the currently retrieved patient.

There are two tabs:

- Task History Shows a list of all sent tasks associated with this patient. You can use the Organisation drop down list to show only those tasks sent by a particular organisation or select All Organisations.
- **Pending Tasks** Allows you to view tasks that have been created but not sent. They will be sent automatically when the patient record is saved.