2025

SystmOne for Beginners

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

North West London

Contents

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)

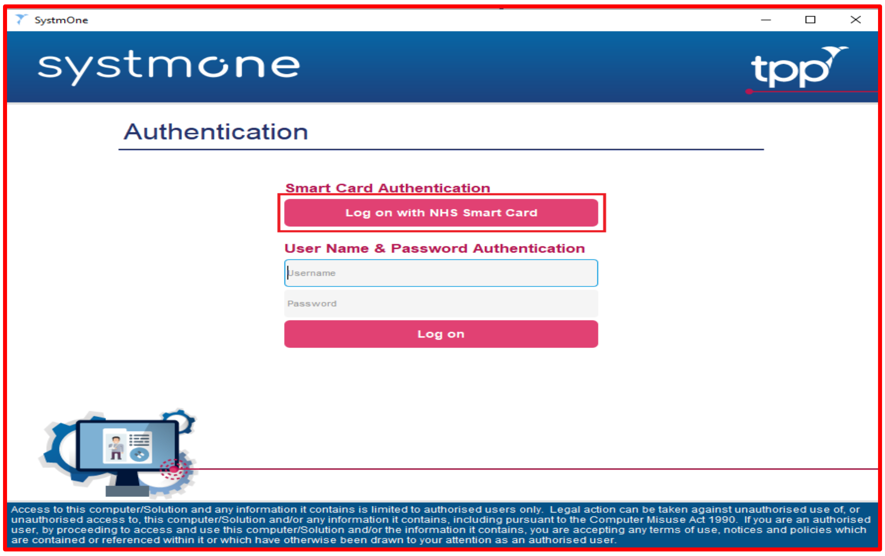
Login, Logout and Lock SystmOne

Two ways to log in:

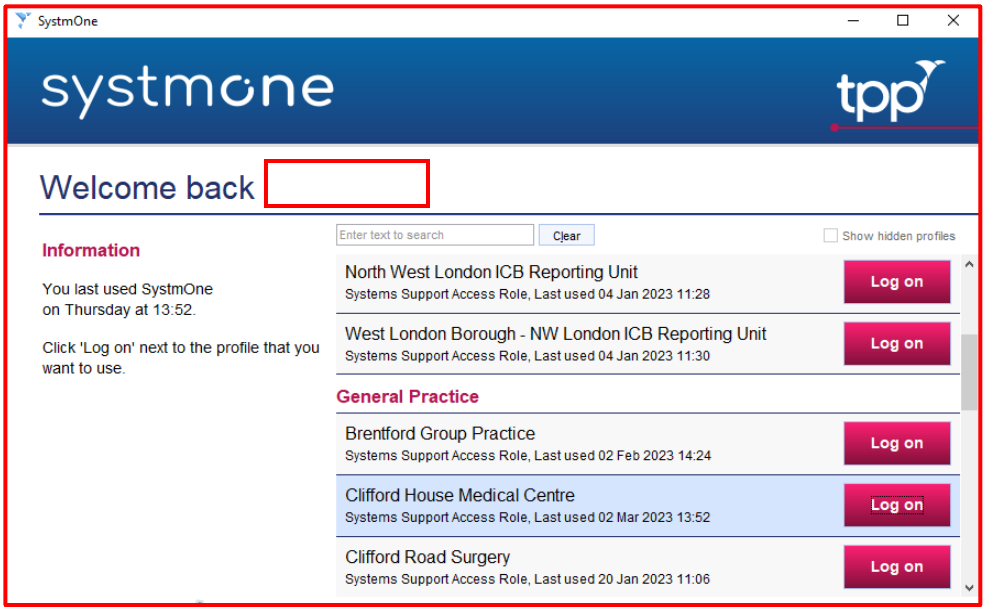
Option 1 – NHS Smartcard Access

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.



- This will then take you to your Profile screen:

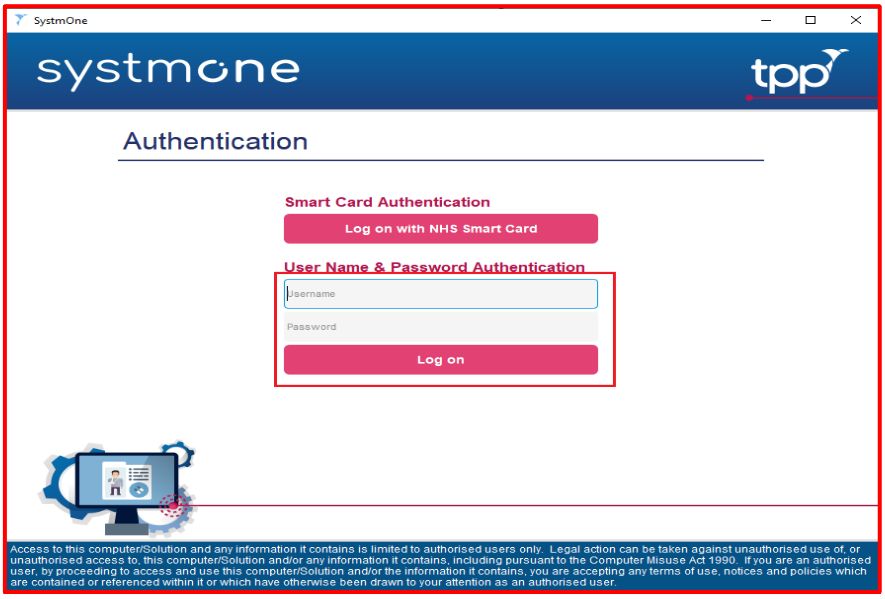


- Select the unit you would like to login to from the drop-down list (if you are working at more than one).
- Click on the **Log on** button which will then take you to your **Home Screen.**

NOTE: 1st 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.

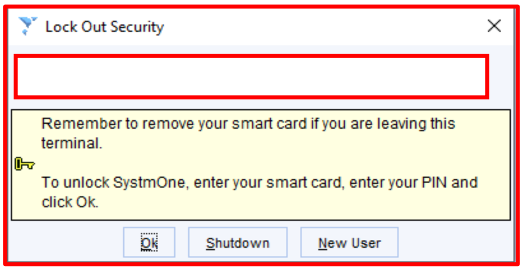


NOTE: Username & Password gives **NO Spine** functionality.

SystmOne Lock Out

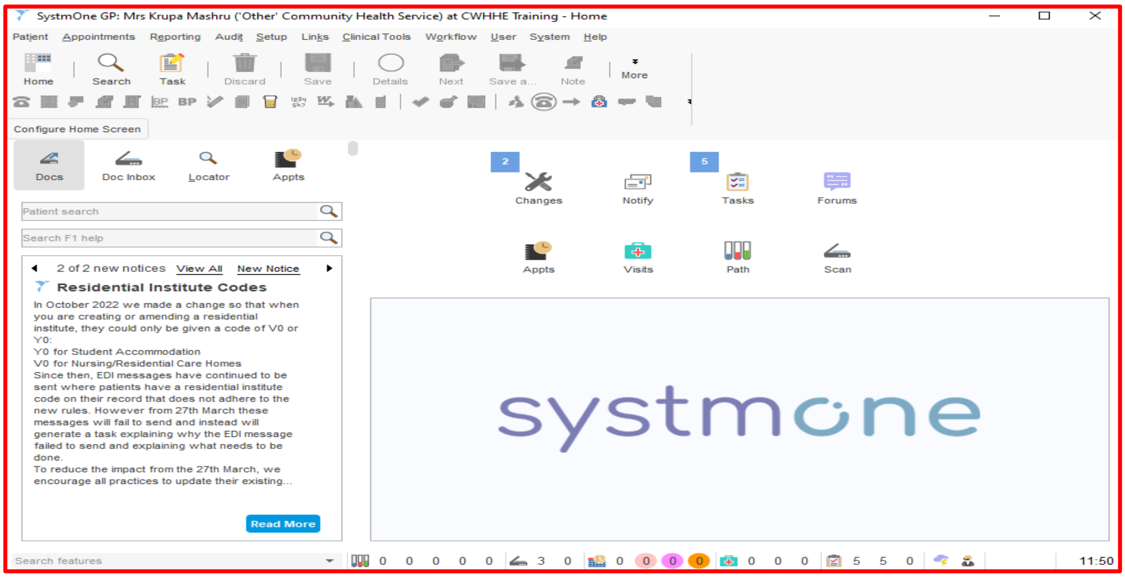
Always lock your system when leaving your machine or work area for any short period of time (going to the toilet/making a drink, e.g. remaining in the office).

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



- 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

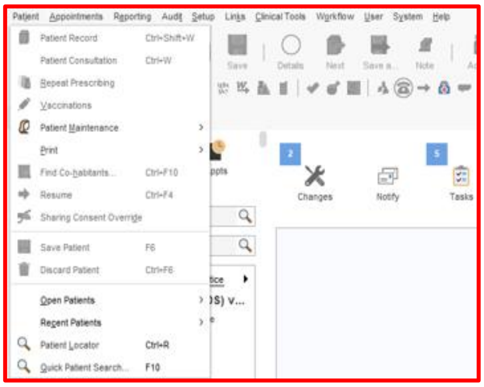


The SystmOne Title Bar is displayed along the top of the screen:

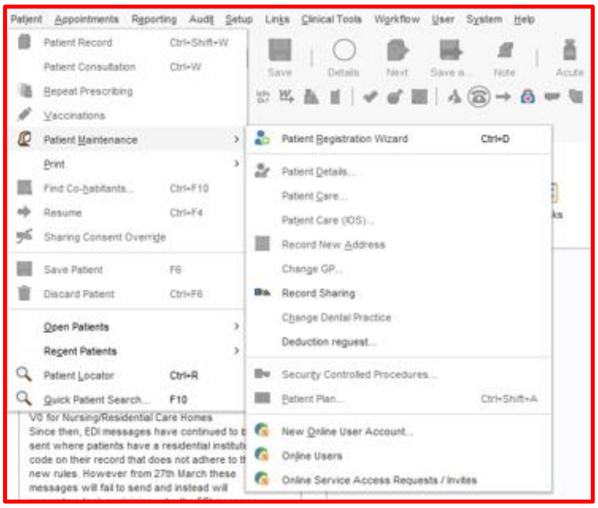
- This displays the Name of the user logged on, the Unit name and the current page you are on, in this case the Home screen, this changes as you move around the system.

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.

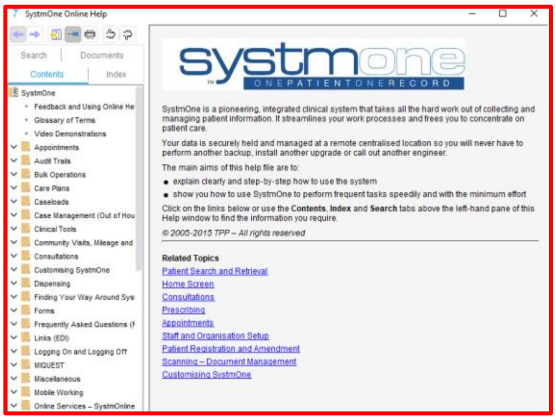
When you log into SystmOne you are asked to enter your PC location. Alternatively, you can go to the **System** Menu – **PC Settings** – Expand **Appointments** from the left hand side – **PC Location** – Enter **Location description** (e.g. Back Office).

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).

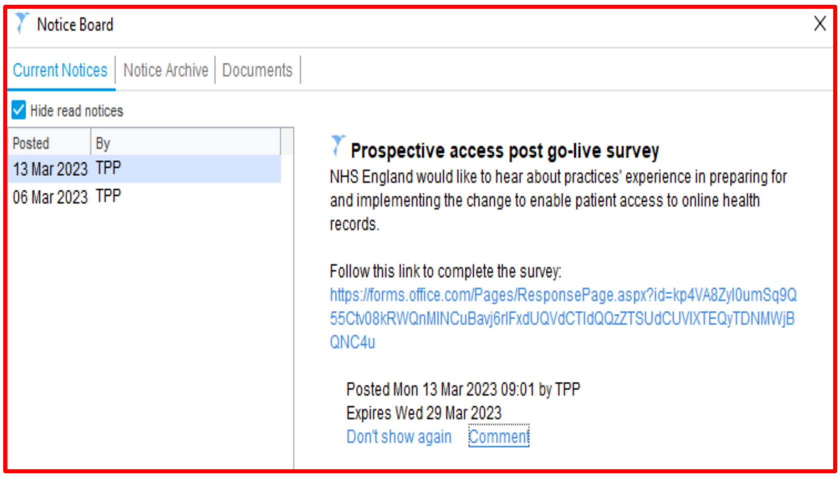
- **Option 1** – Shift+F1 key launches the Help Browser so you can search for help files by using the Contents, Index, Search and Documents tabs as required.



- **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:



- 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.

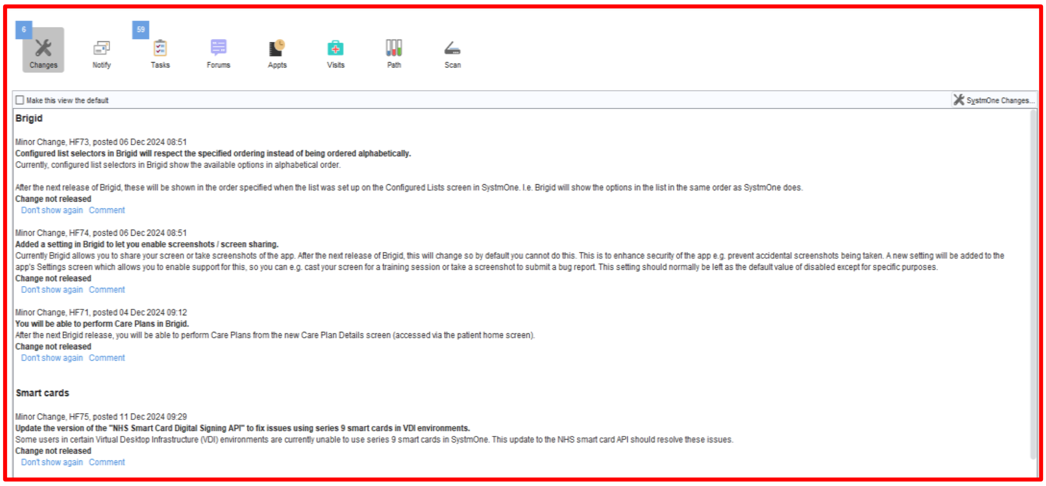
NWL ICB will utilise the notice board to share any important SystmOne notifications or downtime updates.

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.

- **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).

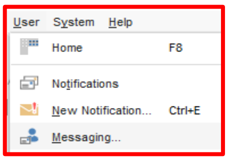
Instant Messaging

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.

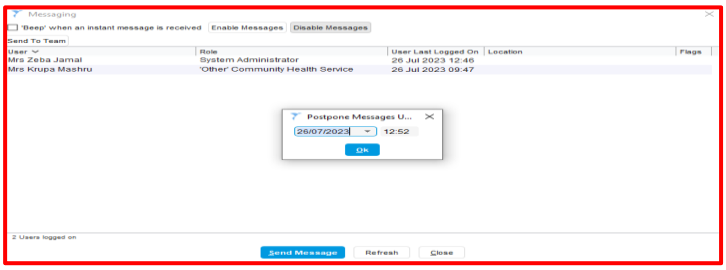
Remember these guidelines when using instant messaging:

- 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**.
- 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.



- 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:

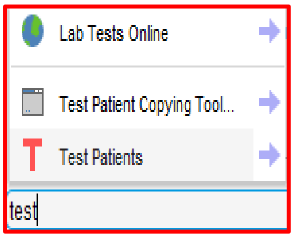
- Incoming messages appear at the bottom right of your screen where you can either **Reply**, **Postpone** or **Dismiss** the message.

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

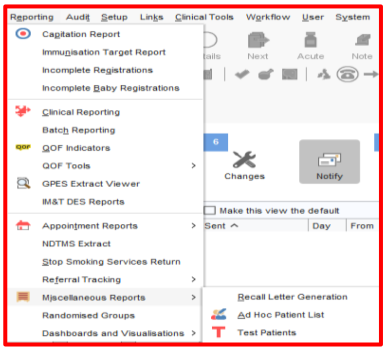
Retrieving a Test Patient

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)**.

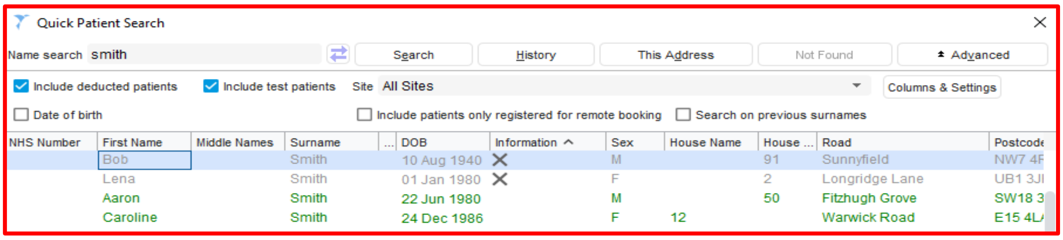
Click on **Test Patients** and this will retrieve a list of Test Patients for the organisation in Orange.

Quick Patient Search

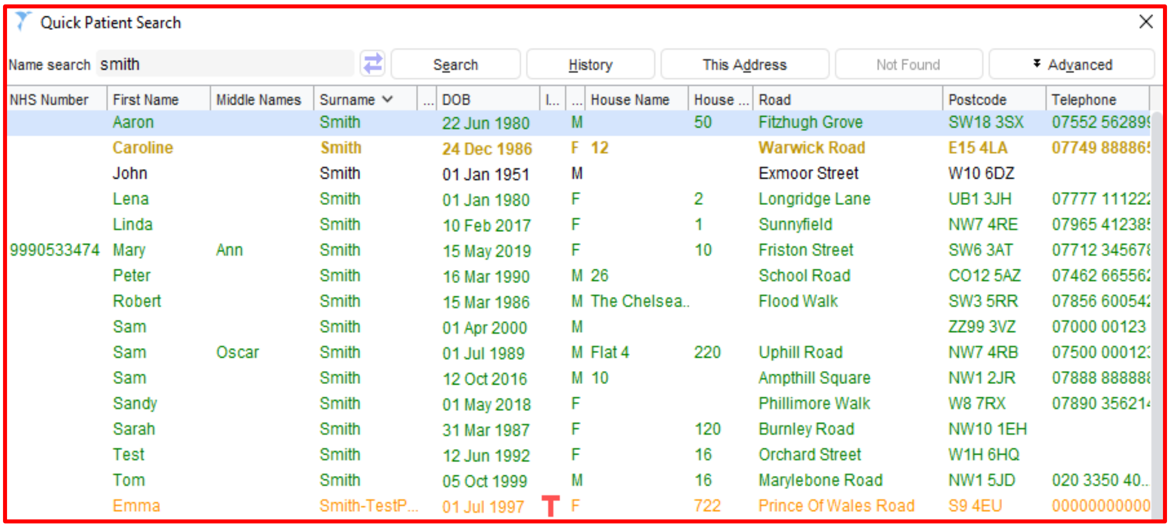
There is more than one way to locate a patient:

- 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:

- 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.



- **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 Search button and it should return some results.



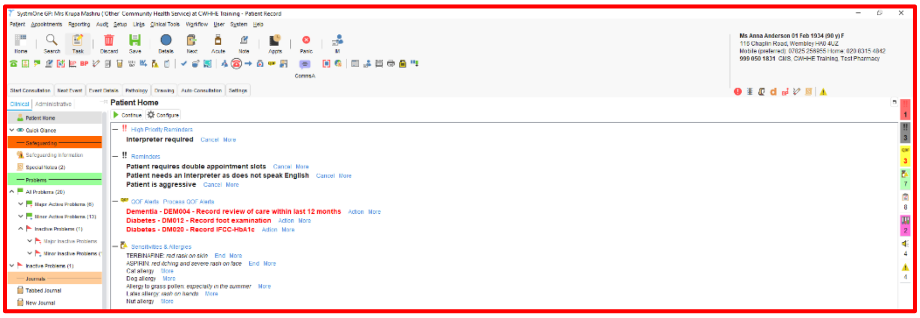
- Only the first 20 patients matching your search criteria will be displayed. To view more than 20 results you must use the Patient Locator.
- SystmOne uses the following colour coding on the Quick Patient Search dialog.
  - **Black** – Permanent GMS patient.
  - **Green** – Patient applied for GMS.

- 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:

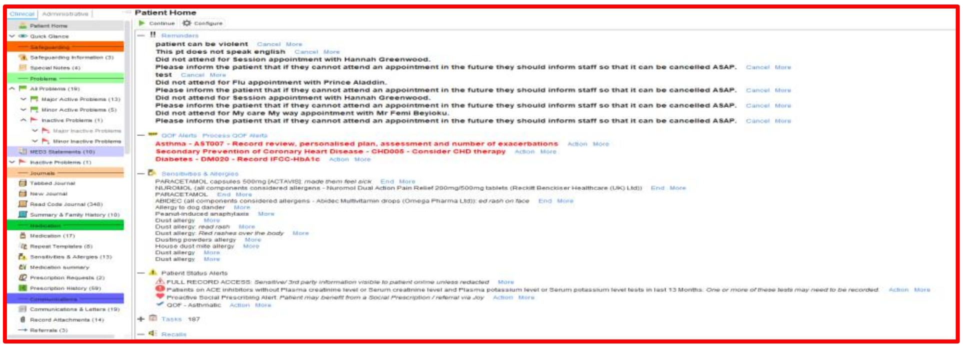
- **Clinical Tree** – this tab is displayed by default when you retrieve a Patient Record. You can access all of the clinical data saved for a patient via the Nodes displayed on this tab.
- **Administrative Tree** – this tab is intended to allow you to view administrative information for a patient via 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.
    - 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.

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

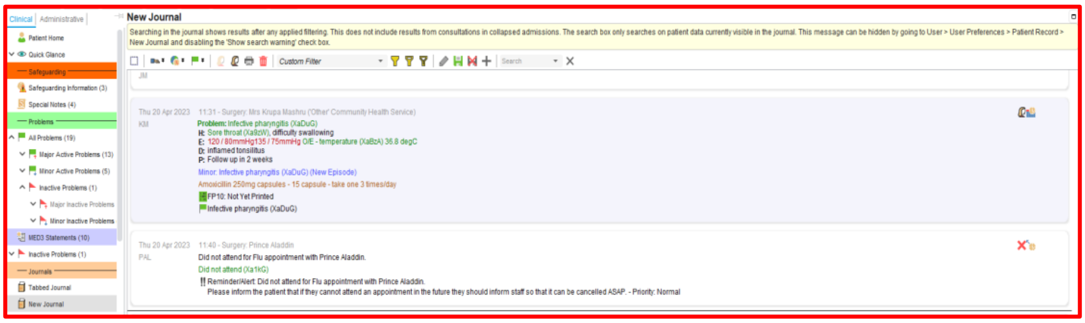
- Select the Patients Home Node, other messages will be displayed in the main screen such as: Patient Record open elsewhere message, Reminders, Status Alerts, Sensitivities and Allergies, Scan to File, Tasks, Visits, etc., by **clicking on them** it will take you to either that Node or open up an additional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



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.

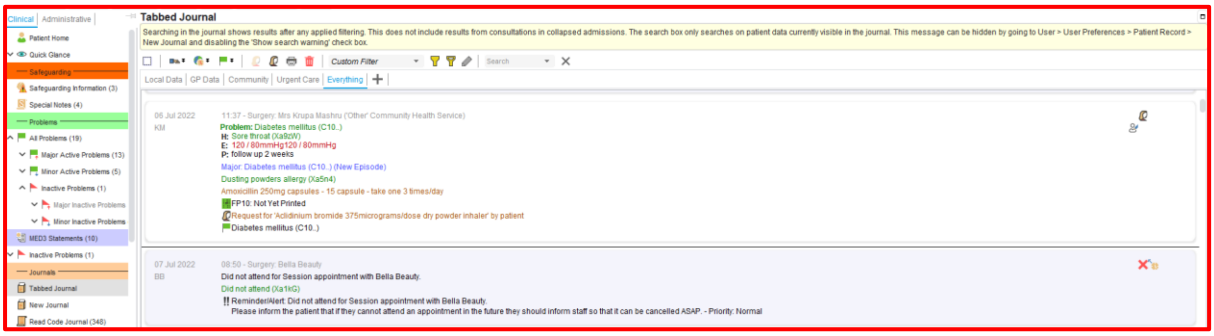


The **Tabbed Journal** differs from the New Journal in that data is displayed in date order on different tabs according to where it was entered. This makes it easier to separate out data recorded at your organisation or, for example, at an urgent care organisation.

Tabs in the Tabbed Journal

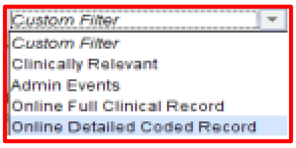
Tab	Description
Local Data	Shows data added by the **current organisation**
GP Data	Shows data added by SystmOne **GP organisations**
Community	Shows data added by SystmOne **community organisations**
Urgent Care	Shows data added by SystmOne **urgent care organisations**
Everything	Shows all data **available**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

Tip: To view all the details contained in the patient record, click 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:

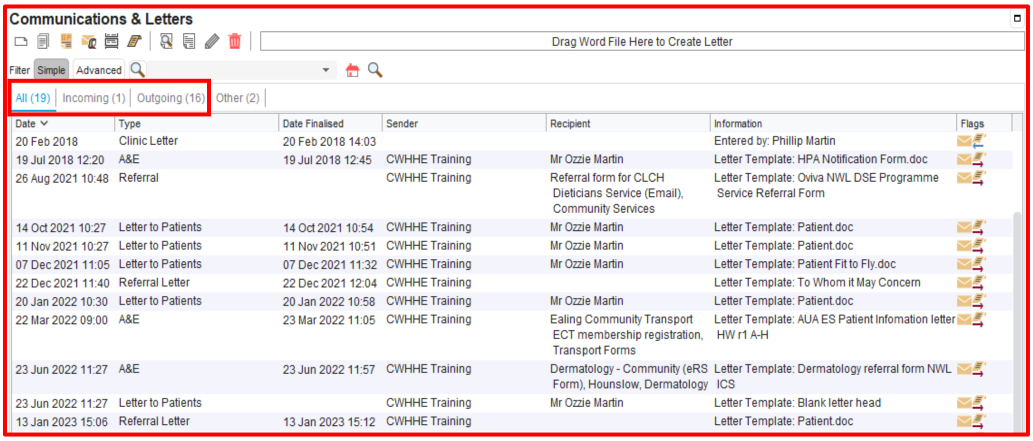
- The **first part** identifies the date, time and initials of the person who recorded the event/data on the record. Hover the mouse over initials for full details.
- The **second part** displays what's been recorded including any read codes, etc.
- The **third part** displays various icons which provide 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).



- **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.

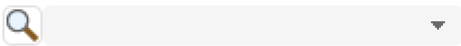
Communications & Letters Node:

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.



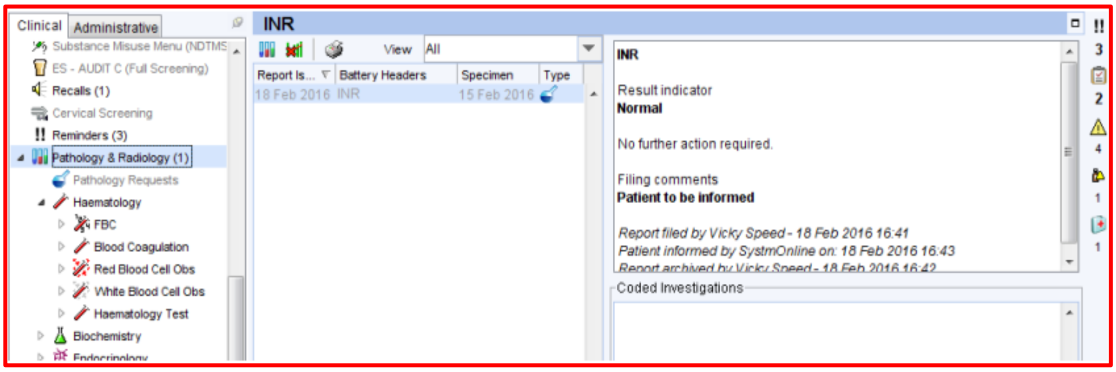
- To view only your organisation documents click on the  button to the right of the screen

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.

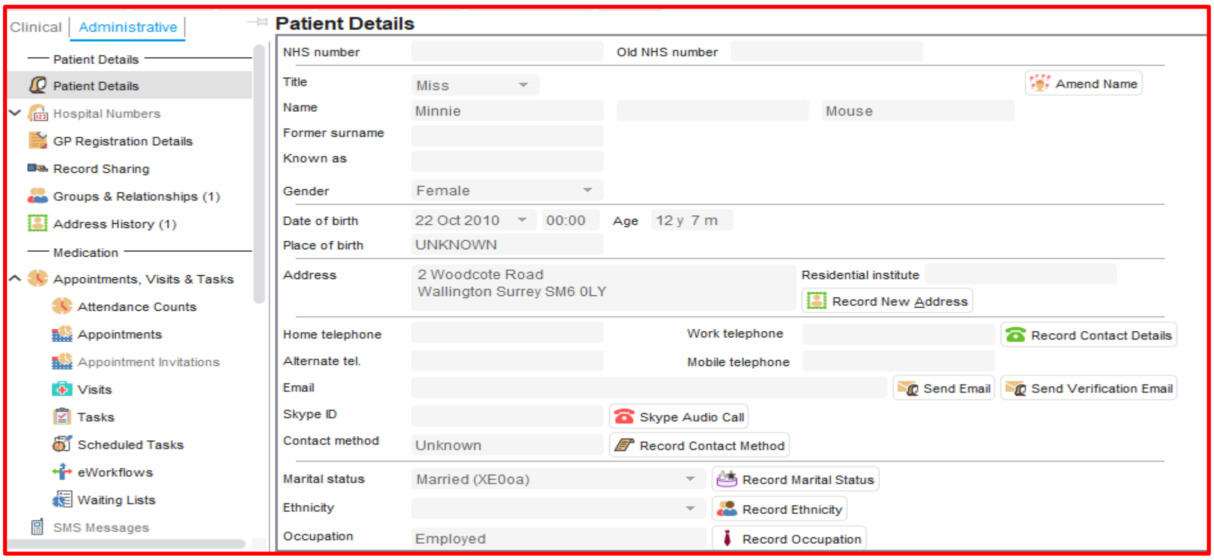


Examples of Administrative Tree Nodes:

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

Patient Details Node:

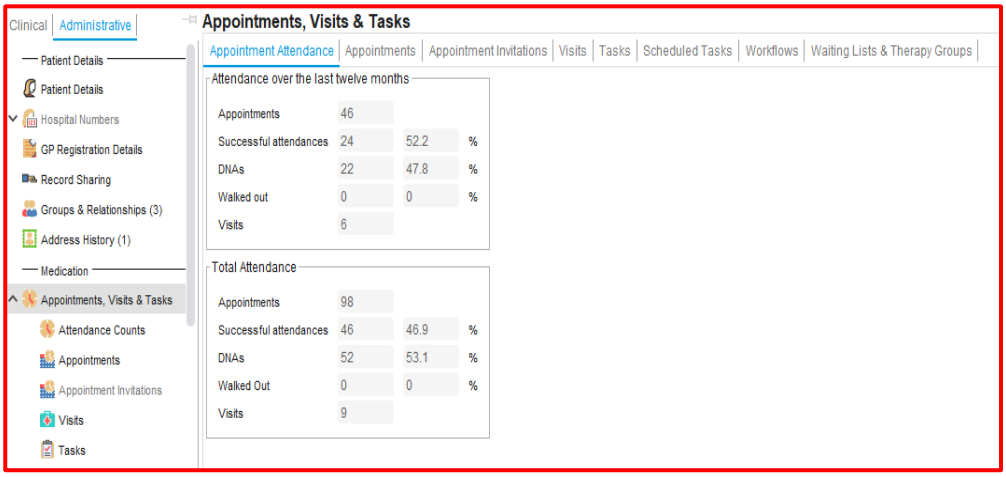
This node allows you to be able to update patient details where there is an icon at the end of the field, click on it and then update accordingly.



Appointments/Visits/Tasks Node:

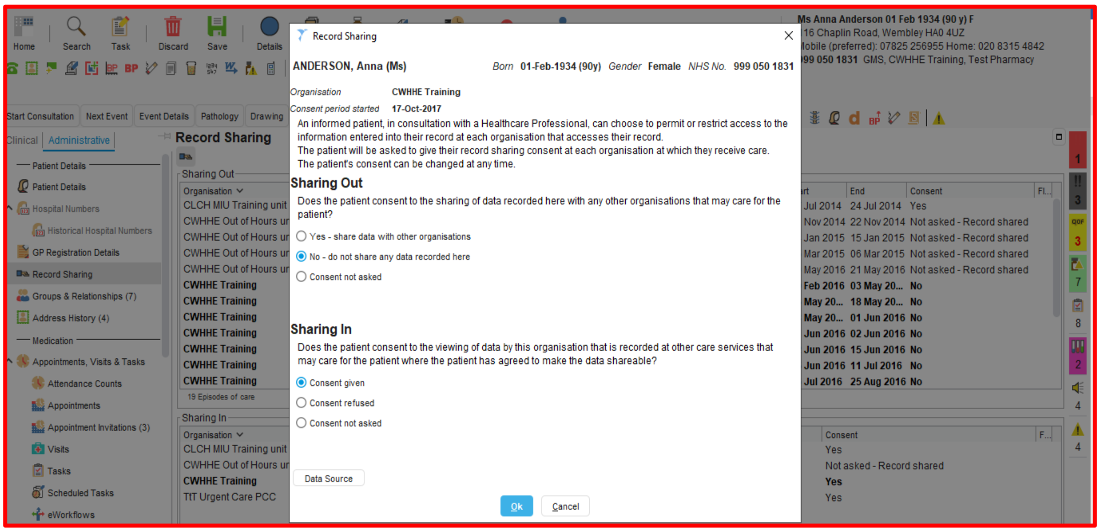
This section is designed to facilitate the scheduling of appointments, coordination of visits and delegation of tasks, ensuring that clinical and administrative duties are effectively managed and tracked to support seamless care by allowing you to view details of the following:

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



Record Sharing Node:

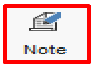
An informed patient, in consultation with a Healthcare Professional can choose to permit or restrict access to the information entered into their record at each SystmOne organisation that access their record. The patient will be asked to give their record sharing consent at ach organisation at which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

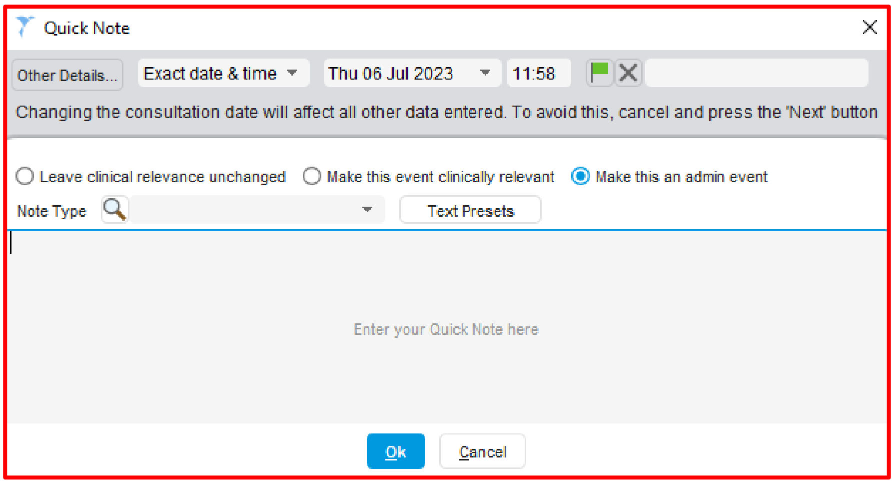


- Select the appropriate option for both Sharing in and Sharing out.

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:
    - Retrieve the Patient Record.
    - Click  on the toolbar.



-
    - Ensure the Date & Time of the event are set appropriately.
    - Specify if event is Clinically Relevant or Admin Event.
    - 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.

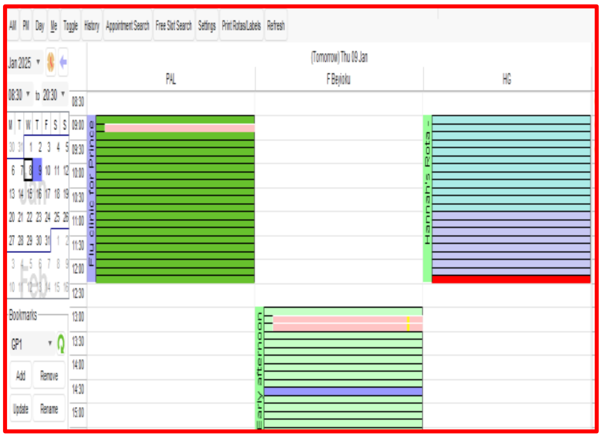
NOTE: There is NO Clinical Coding associated with Quick Notes so you are unable to report on them. If you subsequently start a consultation, the note will be displayed in the **History** section of a **Guided Consultation**, or the **Consultation Notes** tab of a **Simple Consultation**.

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

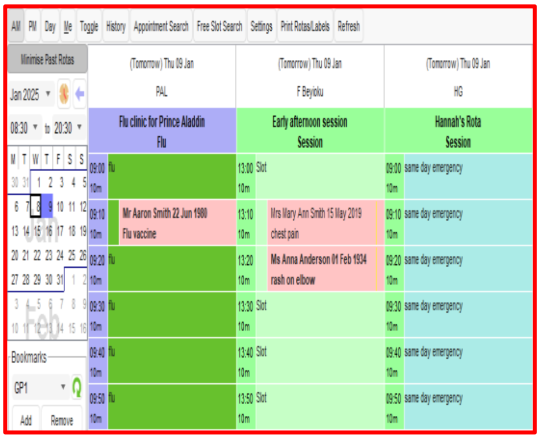
Book and Manage Appointments

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.

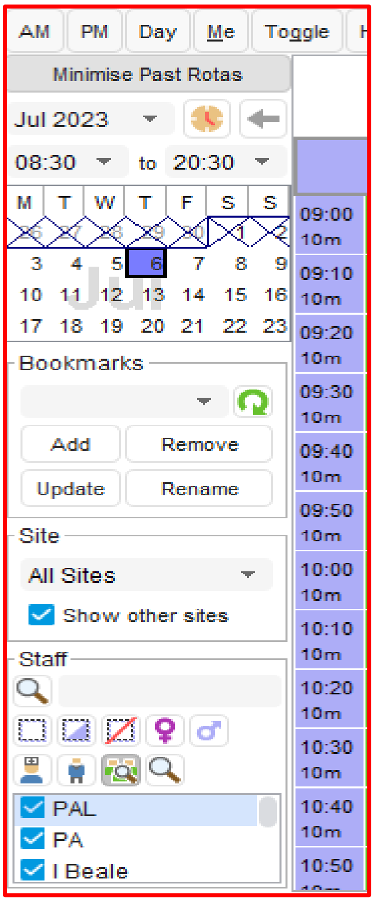
Appointment Overview



Appointment Ledger



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 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.
  - **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.**

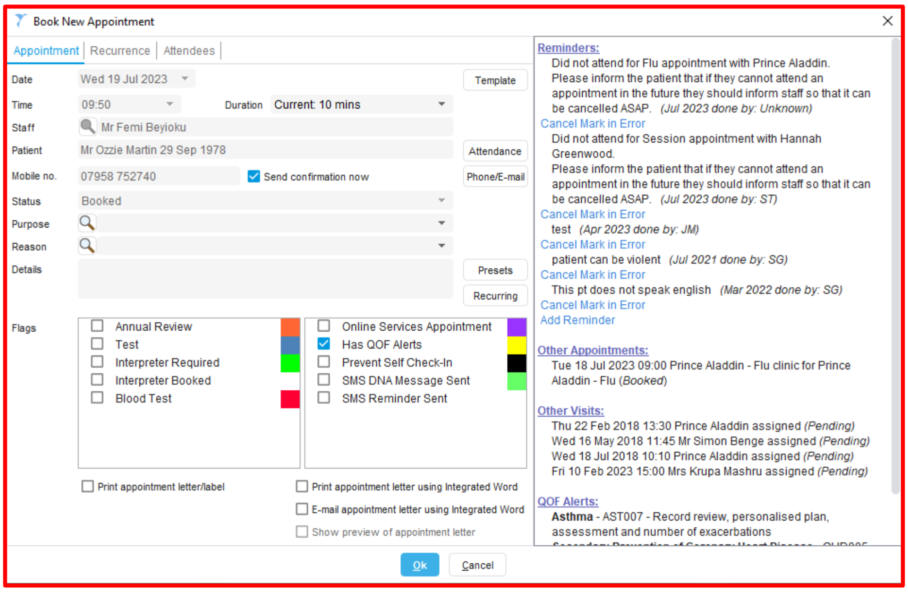
- **Blocked Slot** – A slot that cannot be booked. You may want to block slots in a Rota in order to reserve time for Administration tasks, tea breaks, etc.
  NOTE: Only users who have been added to the **Can block appointments** list by a System Administrator can block appointment slots.

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.

- 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**.
  - 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**:

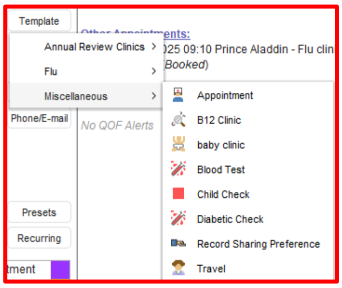


NOTE: A panel is displayed on the Right-Hand side of the Book New Appointment dialog. Any reminders are displayed, together with details of any other booked visits and/or appointments and any QOF alerts triggered.

- **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 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.

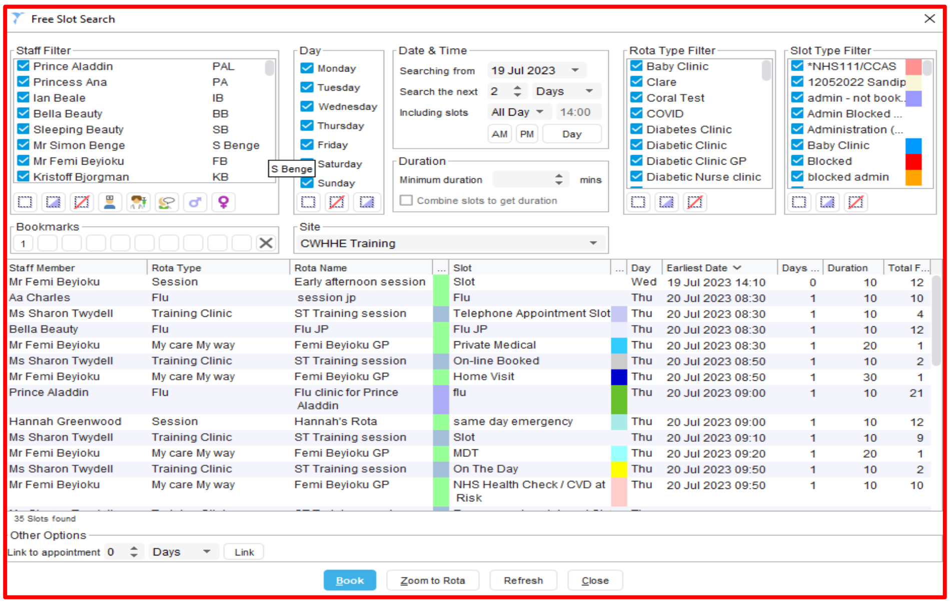
- **Recurrence Tab** – If having regular appointments e.g. for Wound dressing (Same Rota Templates must be applied with the same named Clinician if not this functionality won't work).
- **Attendees Tab** – To record if someone was present, i.e. relative or additional staff member.
- Click **OK** at the 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:



- 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.

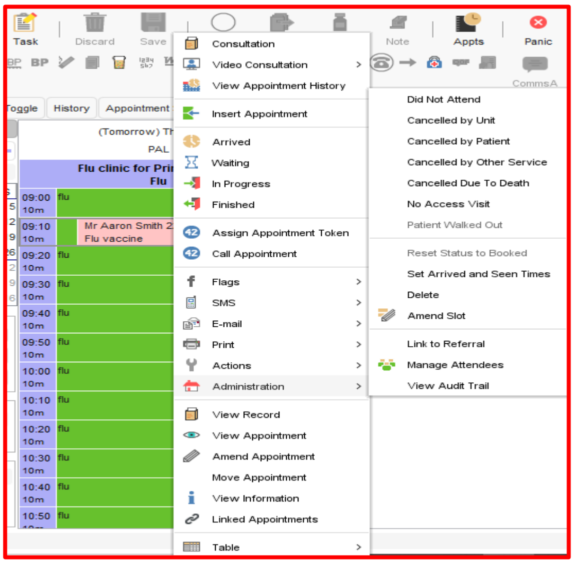
Options available to use from Right Clicking on a result in the lower half of the Free Slot Search dialog:

- **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.



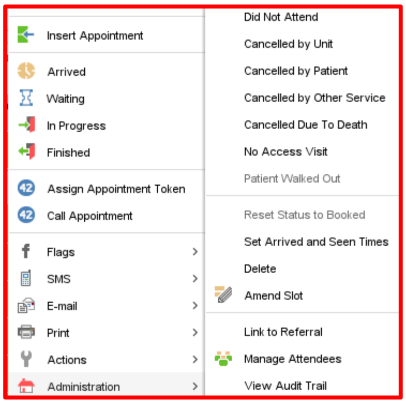
To Delete an Appointment

- **Right click** on the slot you want to **Delete** and select **Administration** – **Delete**.
- Click **Yes** to confirm that you want to delete the appointment.

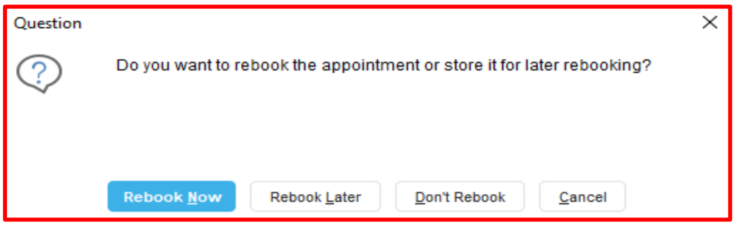
NOTE: You should only delete an appointment if it was booked in error; otherwise, select and alternative reason from the **Administration** sub-menu, for example **Cancelled by Patient.**

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**.



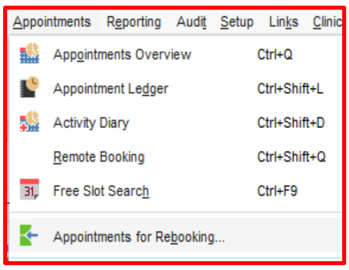
- When you cancel an individual appointment, you will be asked by the system what you want to do with the appointment:



- **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:

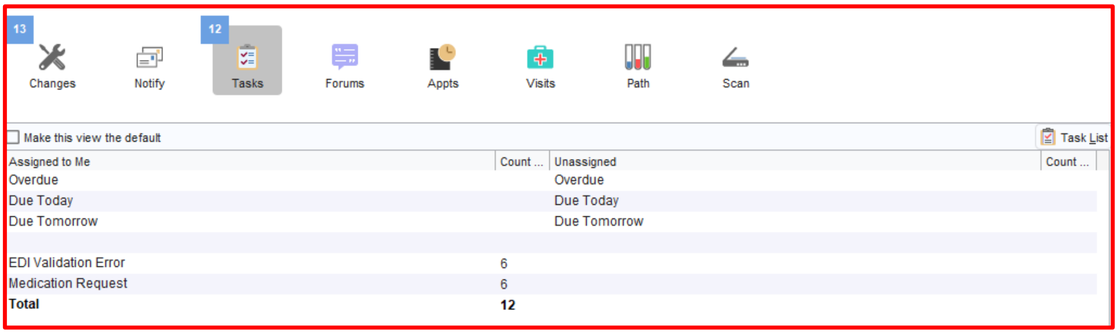
Some Task Types have been created by SystmOne and are not amendable by users. The names given to these Task Types are straightforward, i.e. **Patient Accessed**, **Shared Care Granted**, **EDI Translation Error**. There are many different type of process tasks and these generally must be Actioned before 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?

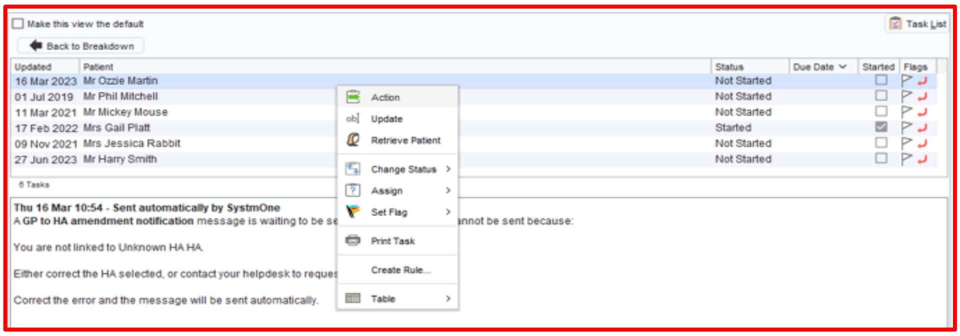
- **Left click** on the Tasks button from your To Do buttons on your Home Screen:



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.

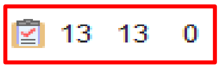
- **Right click** on each task to see the list of processing options.



- 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.

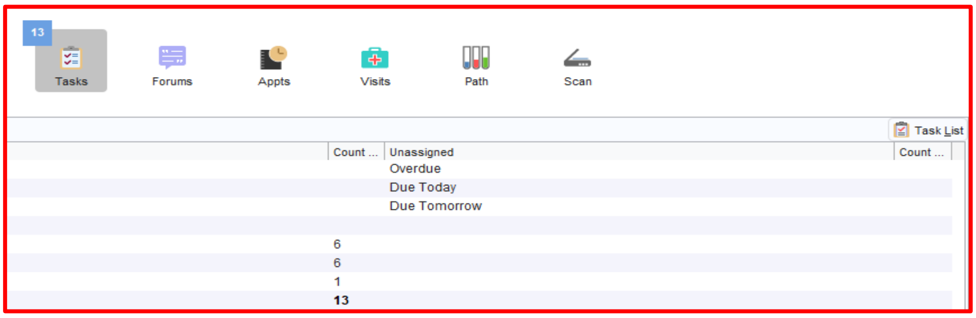


- When you double click on the counter it will take you to the task list screen.

Managing Tasks via the Task List Window

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

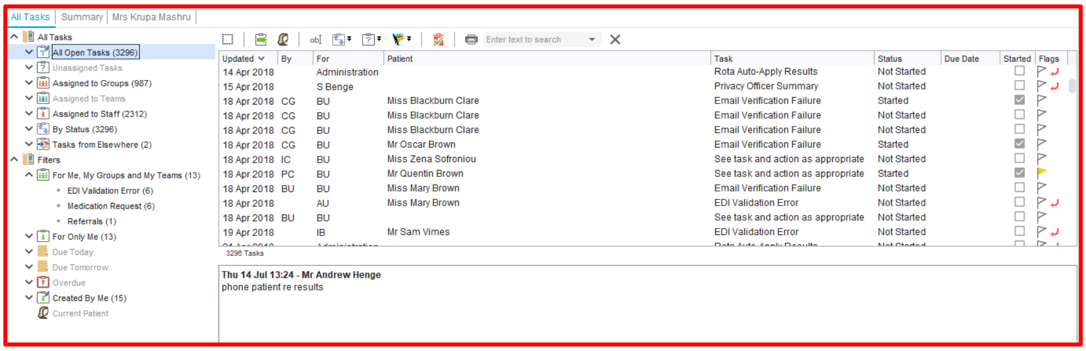
- **Click** on the blue **Task button** on the Home Screen and select the **Task List** button.



- 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



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:

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

Filters

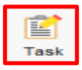
This folder helps you to find out which tasks are for your personal attention. The tasks listed include tasks sent to users within your organisation, either from other organisations or by another user within your organisation.

The following filters are available:

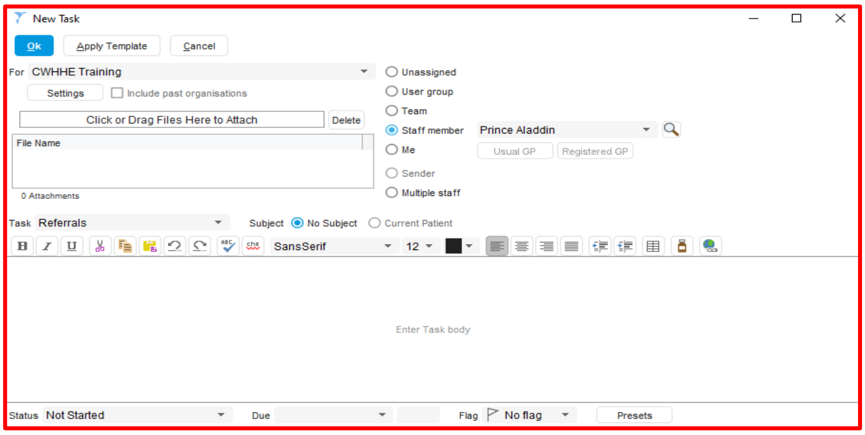
Filter	Description
For Me	The number of tasks assigned to you, including tasks assigned to user groups of which you are a member.
For Only Me	The tasks that are assigned to you alone, not including tasks assigned to user groups of which you are a member.
Due Today	Tasks with a due date of today.
Due 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	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 

icon on the Main Toolbar.
- Creating a task from the Task window:



- 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 ab , 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.