

# SystmOne for Clinical Staff

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

## North West London

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### NHS

North	West	London

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#### Introduction

This user guide is aimed at providing clinical staff with clear and practical instructions on how to effectively navigate and utilise SystmOne for managing patient care and data.

#### Appointments

#### **Appointment Screen Overview**

The Appointments Ledger (diary) can be accessed via the **Appointments Menu – Appointments Ledger** or via the **Appts** icon on the large toolbar.

The left hand column gives different filtering options (highlighted in green) for the main screen including site and clinician, only male or female clinician and role.

The calendar (highlighted in **blue**) in the left hand column allows you to navigate to different days and view multiple days by clicking and dragging across the days e.g. a week or all of the Thursday's in a month. Alternatively, you can hold down the **Ctrl** key on your keyboard and select the days you wish to view.

To return to today's date just click on the yellow clock above the calendar. The blue arrow next to the clock will take you back to the last set of dates you were viewing.

**Rotas** (highlighted in **Orange**) – The clinician's name and/or clinic name will appear at the top. Rota's may appear in different colours. Your practice will have their own preferences.

**Slot Types** (highlighted in **Purple**) – Different slot types may be shown in different colours, examples may be Book on the day, Same day embargo, telephone appointment.

#### **Appointment Statuses**

SystmOne has several appointment statuses to help clinicians and administration staff manage patient bookings efficiently.

Reception staff may mark your patients as arrived.

		(Tomorrow) Thu 27 Mar F Beyioku	8	Arrived	
		Early afternoon session Session	<u>×</u> -3	Waiting In Progress	
13:00 10m	Slot		4	Finished	
13:10 10m		Ms Anna Anderson 01 Feb 1934	1	Assign Appointm	ient Token
13:20 10m		Mr Aaron Smith 22 Jun 1980	62	Call Appointment	
13:30 10m		Mr Thomas Jenkins 02 Sep 1983 –>]	f	Flags	>
13:40 10m		Miss Janet Jackson 15 May 1965	i i	E-mail	>





Apr 2025 🔻 🤻 🖛	SB
08:30 - to 20:30 -	Sleeping Beauty GP session AM Session
M T W T F S S 31 1 3 4 5 6	09:00 Slot 10m
7 8_ 9 10 11 12 13 Bookmarks	09:10 Slot 10m
GP 🔻 <b>Q</b>	09:20 Slot 10m
Add Remove	09:30 1 Day Embargo 10m
Site	09:40 1 Day Embargo 10m
All Sites 👻	09:50 1 Day Embargo 10m
Staff	10:00 Slot 10m
9	10:10 Slot 10m
	10:20 Slot 10m
SB	10:30 Slot 10m
	10:40 Telephone Appointment Slot
BB	10:50 Telephone Appointment Slot

(Tomorrow) Thu 27 Mar			(Tomorrow) Thu 27 Mar		(Tomorrow) Thu 27 Mar			
	PAL			F Beyioku			HG	
	Flu clinic for Prince Aladdin Flu			Early afternoon session Session			Hannah's Rota Session	
09:00 10m	flu	1: 10	3:00 S 0m	Slot		09:00 sa 10m	ime day emergency	
09:10 10m	flu	1: 10	3:10 S 0m	Slot		09:10 sa 10m	ime day emergency	
09:20 10m	flu	1: 10	3:20 S 0m	Slot		09:20 sa 10m	ame day emergency	
09:30 10m	flu	1: 10	3:30 S Om	Slot		09:30 sa 10m	ame day emergency	
09:40 10m	flu	1: 10	3:40 S 0m	Slot		09:40 sa 10m	ime day emergency	
09:50 10m	flu	1:	3:50 S 0m	Slot		09:50 sa 10m	ame day emergency	
10:00 10m	flu	14	4:00 S 0m	Slot		10:00 sa 10m	ame day emergency	



(Right click and change the status from **Booked** to **Arrived** – slot colour change from Salmon pink to Purple).

The main appointment statuses are: **Booked** – The appointment has been scheduled for the patient. **Arrived** – The patient has been checked in for their appointment. **In Progress** – The patient is currently being seen by a clinician. **Finished** – The appointment has finished. **Did Not Attend (DNA)** – The patient did not show up for their appointment. **Cancelled** – The appointment has been cancelled, either by the patient or the organisation. **Waiting** – The patient has arrived and is waiting to be seen.

#### Viewing a Patient Record

A booked appointment is easy to identify, as the slot colour will be a salmon pink colour and will be populated with patient details. Hover over the slot to expand the details.

If you want to check the record before you see your patient, you can retrieve the patient record by right clicking and selecting **View Record**. This will allow you to view the record and then discard until you are ready to add your consultation notes. If you have viewed the record and are ready to add your consultation notes, click the **Start Consultation** tab within the patient record and this will link to the appointment and update the appointment status.

If you wish to start a consultation without viewing the record, select **Consultation** from the right hand options.

- The slot colour and status slot status will change to "In Progress" when you are in consultation mode.
- When the patient record is saved after entering the consultation details, the colour and slot status will change to "Finished".

#### **Booking an Appointment**

Right click on a free slot to book an appointment, you will be prompted to search for a patient. If you have a patient record open, it will automatically select and book an appointment for that patient.

Once you have searched for a patient, a **Book New Appointment** window will appear.

On the right hand side, you will find information on other appointments that patient may already have booked and other patient alerts.

The **Duration** of the appointment can be amended where appropriate/available by clicking the drop down box next to duration.

The **Details** field can be used to type in any useful information, e.g. *Patient's son attending with them*. To confirm the appointment with the patient, you can send an SMS message.





ppointme	nt Recurrence Attendees			No reminders
ete	Wed 26 Mar 2025 *		Template	
ine	÷ 00:00	Duration Custom: 20 mins *		Thu 27 Mar 2025 13:40 Mr Femi Beyloku - Early afternoon s
taff	Prince Aladdin			- Session (Finished)
atient	Miss Janet Jackson 15 Ma	ay 1965	Attendance	No visits
lobile no.	07795 42310	Send confirmation now	Phone E-mail	No DOE Alerte
tatus	Booked	*		
urpose	9	*		
eason	۹.	*		
etais	Diabetic Review Patient's son attending wi	ith them.	Presets Recurring	
laga	Annual Review     Test     Interpreter Require     Interpreter Booked     Blood Test	Online Services Appol     Has ODF Avents     SNS DPA Message S     SMS Reminder Sent	ntment	
	Print appointment letter/lab	bel Print appointment letter using int E-mail appointment letter using int E-mail appointment letter using int Discour specieur of appointment i	egrated Word	



If your organisation uses appointment templates, these can be applied via the **Template** button, e.g. Diabetic Review template would prompt you to check that the patient has had their annual blood test before booking the appt.



#### Consultations

In the **Appointments Ledger**, you can select the **Me** button and you can double click to zoom into your rota, showing more detail.

4M PM Day <u>M</u> e Ti	oggle History Appointment Search Free Slot Sea	rch					
Minimise Past Rotas	(Today) Wed 26 Mar		Y				
2025 🔻 🏨 🔶	K Mashru	<u>Co</u>	ise Pri	t Simple List Print Standard List Print Detailed List Appointment Search Free Sict Sea	rich Settings		
	14.50 Same bay Linearge	2	2	1440//-	(Today) Wed 26 Mar 2025 08:30 - 16:50 Mrs Krupa Mashru - FLU AM - Session		Zoom
0 * to 20:30 *	10m	_	-				
	15:00 Same Day Embargo		53101				
kmarks	10m		· Se				
~ Q	15:10 Same Day Embargo	16.1	10 Nr. D	Same Day Embargo			
dd Remove	10m		3				
	15:20 Same Day Embargo						
sate Rename	15-20 Same Day Embaron	16	20	ter			
	10m	103					
Sites +	15:40 Same Day Embarop			Miss Janet Jackson 15 May 1965 Recurrent infections		Embargoed Slot	
	10m						
Show other sites	15:50 Same Day Embargo	10.3	30	lan			
	10m			Ns Anna Anderson 01 Fab 1934		Embarroad Sint	
	16:00 Same Day Embargo			Back pain		Has GOF Alerts	
0 7 9 7	10m						
	16:10 Same Day Embargo	16.4	40	Same Day Embargo			
	10m						
- Maaba	16:20 Miss Janet Jackson 15 May 1965						_
Masiliu Makta (Sustam	10m Recurrent intections						
J menia (oystem	16:30 Ms Anna Anderson 01 Feb 1934						
J multay	tum back pain						
A Prescriber i	18:40 Same Day Embardo						

All consultations where an appointment has been booked, should be started from the **appointment slot.** This will enable them to be linked.

Right click and select **View Record** if you want to check the record before you see your patient. If you are ready to start recording your consultation, click the **Consultation** button and this will link your notes to the appointment and update the appointment status. If not, discard the record until you are ready.

#### **Recording Consultations**

To record a consultation:

- Right click on the slot and select **Consultation** which will retrieve the patient record in consultation mode.
- Below is the consultation screen:

No pi	roblems linked to this section
History	1
Examination	
Diagnosis	
Intervention	No Interventions recorded
Plan	
New Section	Merge Delete

When you start typing in any of the field, you will notice that recommended codes will appear, you can select a code from the list. You will notice the coded data will turn green. Remember to use codes wherever possible.

History: The background of the presenting complaint, as given by the patient.





**Examination**: Your observations of the patient and the results of any physical examination, e.g. BP readings.

You can **right click** and see these options:

- 1. **Insert code** (remember that free text cannot be reported on). Codes will show in green.
- 2. You can **Insert BP** readings, e.g. specifying if a BP is from sitting or standing reading (120/80).
- 3. **Insert numeric** e.g. temperature add the most used values in your favourites to speed up your consultation.
- > There are shortcuts to record readings, e.g. type in BP (space) 125/95 enter.
- > **Diagnosis**: Your conclusions about the patient's condition.
- Intervention: Action taken, for example drugs prescribed, recalls, referrals, pathology requests, vaccinations. Any acute or repeat issues created whilst a complaint is selected are automatically displayed in the "Intervention" section of the relevant complaint.
- Plan: Future course of action, advice given to the patient, details of any treatment plan or narrative on any referrals made.

🧖 🗙 No pi	No problems linked to this section						
History	Sore throat (Xa9zW)						
Examination	Red and inflamed tonsils						
Diagnosis	Tonsillitis (Xa7l0)						
Intervention	Amoxicillin 125mg/5ml oral suspension sugar free - 100 ml - 1x5ml spoon 3 times/day						
Plan	Plan Gargle with warm salty water and review in 2 weeks						
New Section	Merge Delete						

If your patient discusses more than one problem with you, you can use the **New Section** tab to bring up a new window to separate the issues in the Journal.

Button	Description
New Section	Record the details of a new complaint with the current consultation
Merge	Merge the selected complaints.
	Note: You cannot undo a merge
Delete	Delete the selected complaint(s)

No problems linked to this section					
History	Pain in toe (Xa35W)				
Examination	left big toe sore and inflamed				
Diagnosis	Ingrowing great toenail (M2300)				
Intervention	Terbinafine 1% cream - 1 pack of 15 gram(s) - apply sparingly 1-2 times a day as directed				
Plan topical cream & review 2 weeks					
New Section	Merne				

You can **Link** the consultation to a **New or Existing problem**. Click on the **green flag** icon at the top right of the consultation to bring up the problem window.

Diabetes mellitus (C10)	
	Diabetes mellitus (C10) <sup>1</sup>
-   mature	History Peeling more langued over the past month, increased thirst and more nequent unmation

Settings

#### Medical Drawing

To add a drawing:

• Click the **Drawing** button.

Next Event Event Details Pathology Drawing Auto-Consultation

You can create detailed visual representations of anatomical areas or conditions here.



- Select the **body area** from the drop down.
- Right click to display the **legend** colours.
- Use the **slider** for the thickness of the line you want to draw.
- Apply the right click and move cursor over the area you want to draw on.
- Use the **undo** button if you make a mistake or **X** to start again.
- Once you **SAVE** the record, the appointment status is updated to **finished**.

#### Auto-Consultations

The NWL Primary Care Systems Development Team have created Clinical Templates within autoconsultations help to ensure that all information and coding is captured when completing an assessment for a patient.

In a patient record:

- Select Auto-Consultation tab navigate to Enhanced
- Services or QOF from the drop down list Asthma template.
- Blue highlighted fields relate to Enhanced Services, Yellow are QOF fields.
- There are various different fields, e.g. free text entry fields, drop down selections, check boxes, clinical tools, BMI calculator.
- Links to other items on the right hand side (highlighted in green) go directly to what you need to record without dipping in and out, e.g. send a task, send a referral.
- You can click along the tabs at the top of the template (highlighted in pink).
- When you have finished your entries in this template, click **OK** (highlighted in orange) at the bottom of the template and it will close.



 However, if you wish to return to it during this consultation, click SUSPEND and you can then RESUME (green →) from the Patient Menu allowing you to go elsewhere in the record without coming fully out of this auto consultation template and having to navigate to it again.

All data entered will automatically appear in the patient record in the Tabbed Journal, **SAVE** the record.

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#### Prescriptions

#### Prescribing Acute Medication (One-off)

To create an acute medication:

- Click on the Acute button on the top toolbar or right click on the Medication node in the clinical tree and select New Acute.
- Use the NWL Integrated Formulary to search for the appropriate drug by entering at least the **first three characters** of the drug name in the Search field, e.g. AMO.

If the patient has any sensitivities or allergies recorded, these are displayed in a red box at the foot of the window.

Sensitivities & Allergies: 🚺 TERBINAFINE 🚺 ASPIRIN 丸 ASPIRIN 角 allergy (Xa7IR) 🔔 Nut allergy (Xa7IJ) 🔔 Allergy to grass pollen (XaOJ7)	Cat allergy	(X00I3) 🔺	Dog allergy (Y016b)	Allergy to grass pollen (XaOj7)	Latex
	<u>0</u> k	<u>C</u> ancel			

- Select the drug you want to prescribe and click **OK**.
- Once you have select the drug, the dose and quantity will be worked out (this has been done by the meds management team).
- Dose calculator It works by converting free text entered in the Dose field into a calculation to work out a numeric value for quantity or issue duration.
- Always check the dose, quantity enter or amend the dosage for your patient if necessary.
- Check/amend the medication start date if required.
- Script type will remain as NHS Issue.
- Type any script notes these will appear on the prescription.
- Script and Administration Notes.
- Type in any Script Note This appears on the script and will go to the pharmacy (e.g. dose changed, dose increased, etc.).
- Type any Administration Note Anything clinically relevant, e.g. blood test due, medication review due, e.g. stop medication on 01/02/2024 pre gall stones removal operation which will not appear on the script but will be shown in the patient record (in the Medication View and Tabbed Journal).
- If you decided at this stage, the medication should be on repeat, there is a tick box for this Automatically create a Repeat Template based on this issue.









• Click **OK** once you have reviewed and confirmed the prescription details before finalising the issue.



When reviewing a patient's medication, it is very important to verify the dosage and administration instructions as well as checking for any potential interactions or allergies.

#### If there are any issues, a warning message will display and will ask if you want to proceed

#### Prescribing Repeat Medication

The Repeat Template node automates the generation of recurring medication requests based on pre-defined intervals.

As this is a Repeat Template, you will need to check the extra options which include:

- a. Review Date
- b. Maximum Issues (check with your practice if they use this set within Organisation Preferences)
- c. Patient can request online
- d. Repeat template can be reauthorized
- e. Link to a problem or code(s)
- Retrieve the patient record.
- Right click on the **Repeat Templates** node in the clinical tree.
- Select New Repeat Template.
- Proceed as above for Acute Medication.
- You can link to a code and select that a medication review has been performed.
- Click OK.

7 Create Repeat Template	– 🗆 X
Dk & Another Gancel	Ms Anna Anderson 01 Feb 1934 (91 y) F 116 Chaptin Road, Wembey Hulo AUZ Mobile (prefection) 07825 26065 Home 020 8315 4842 999 050 1831 GMS, CWHHE Training, Test Pharmacy
Other Details Exact date & time 👻 Tue 06 May 2025 💌 09:29 🗮 🗙	
Changing the consultation date will affect all other data entered. To	avoid this, cancel and press the "Next" button Inde Warning
Hedication start Tue 06 May 2025 -	
Drug prescribed 💆 👔 🖥 Simvastatin 10mg tablets	₿° i
Script type   NHS Issue   Private Issue   Instalment Dispensed Issue	
Dose take one at night 🖉 💰 Trees 8	Doses
Total quantity   Number 28  tablet  Packa  Pres Tast	
Script potes	
Administrative notes Presets	
Esse duration 28 Days : B	
Synchronise as review dates to this	
C) ose insvirum esses	
Patient can initiate issues irregularly issued template	
Link to Read code(s) Cholesterol level (X772L)	E E
Record that a medication review has been performed	
Review notes	Presets
Patient-Specific Warnings	
Sensitivities (not checked): Allergy to grass pollen (especially in the summer) Latex allergy (rash on hands)	6

• This will now be listed in the **Repeat Template View**.



• Issue – Highlight the medication(s) you would like to issue. Select the Issue 👔 icon or right click and Issue.

Repeat Ter	mplates (Current repeats)							
🗆   🐇 🖡	🚥 🖉 🗙   🥖 🗊 🖏 🕨 📑		🕸 💹   i 🤹 🖒 🗆	]				
Last medicati	ion review recorded on 26 Mar 2025 by Mr	s Kru	pa Mashru ('Other' Community	(Health Service)	. Next due on 26 l	Mar 2026. Record	medication review	Read code (X
Authorised I	Drug			Last Issued	Review	Issues	Compliance	Flags ~
	15 capsule - take one 3 times/day	2	ssue					
26 May 2022	Paracetamol 500mg tablets 32 tablet - take 1 or 2 4 times/day	Q	Patient Request	05 Dec 2024	07 Oct 2025	4 (4)		ā
14 Jul 2022	Paracetamol 500mg tablets 32 tablet - take 1 or 2 4 times/day	×	Undo Issue	05 Dec 2024	07 Oct 2025	3 (3)		Ō
13 Dec 2023	Ramipril 1.25mg capsules 28 capsule - take one daily	1	Amend	05 Dec 2024	07 Oct 2025	4 (4)		ō
1	White coat hypertension (XaIWn)		Reauthorise / Restart					
	Pain in toe (Xa35W) Number of asthma exacerbations in past	•	Stop					
21 Nov 2024	Amoxicillin 500mg capsules 15 capsule - take one 2 times/day	r.	Record Sensitivity	26 Mar 2025	07 Oct 2025	2/3(5)		ā
	Additional Script Notes: ask pat to rest		Assim Disease					
21 Nov 2024	Chloramphenicol 1% eye ointment		Assign Diagnosis 7	21 Nov 2024	07 Oct 2025	2 (2)		ñ
	1 pack of 4 gram(s) - apply 4 times/day		Information >					
26 Mar 2025	Loratadine 10mg tablets			26 Mar 2025	07 Oct 2025	1 (1)		ō
	30 tablet - take one daily Additional Script Notes: Goes to pharmac	旕	New Repeat Template					
26 Mar 2025	Simvastatin 40mg tablets 28 tablet - take one at night		New Repeat Based on This	26 Mar 2025	07 Oct 2025	1 (1)		Ö

**Note:** When you SAVE the patient record, you will be prompted if you have not issued new repeats.

🍸 Ques	tion X
?	You have not issued the new repeat template(s): Abidec Multivitamin drops (Omega Pharma Ltd)
	Do you want to issue them now?
	_
	Show Message Next Time?
	Yes No Cancel Save

- **SAVE** the patient record, the Print Issues window appears.
- Show the drop down selection and various tick box selections.
- Type in any Script or Counterfoil Messages which appear above the repeats list on the right hand side of the script.
  - Recurring patient counterfoil message Specify a message that will appear on all scripts that are issued for the current patient, e.g. please remember to book your appointment via our PATCHS website.
  - **One-off counterfoil message** Specify a message that will only appear on the next prescription printed at your organisation for the current patient, e.g. please book your Annual Diabetic Review with the Practice Nurse.

🍸 Print Issues		×				
Counterfoil options	Print all repeats if a repeat was issued	*				
	If there are no repeats to print, leave the counterfoil blank					
	Print details of next appointment (this ignores appointments today)					
	Print medication review reminder					
	Print recalls due in the next month					
Authoriser	Mr Simon Benge	*				
ETP options	Nominate dispenser					
	$\hfill\square$ Print tokens (optional for electronically signed scripts with a nominated dispenser)	Set Default				
Recurring patient	Please remember to book your appointment via our PATCHS website.	Presets				
counterfoil message		Clear				
One-off patient		Presets				
counterfoil message		Clear				
Scripts will be prin Why are these scr	ited now. ipts not being sent via ETP?					
Script Printing						
Select what to do	with script(s)					
Print Them N	low					
Print Them Later						
X Do Not Print	X Do Not Print Them					
	Settings					



#### **Electronic prescribing**

If the patient has a nominated pharmacy, the medication will go via ETP. The clinician can **Print/Sign and Send Now**.

Y Print Issues	A Loss of	×					
Counterfoil options	Print all repeats if a repeat was issued	-					
	If there are no repeats to print, leave the counterfoil blank						
	Print details of next appointment (this ignores appointments today)	Print details of next appointment (this ignores appointments today)					
	Print medication review reminder	Print medication review reminder					
	Print recalls due in the next month						
Authoriser	Dr ABC	-					
ETP options	Routine     Mmediate						
	Vominate dispenser Community pharmacy (Mattock Lane Chemist, 8 St. Johns Parade,	× 🗄					
	One-off nomination						
	Print tokens (optional for electronically signed scripts with a nominated dispenser) Set Default						
Recurring patient		Presets					
counterfoil message		Clear					
One-off patient		Presets					
counterfoil message		Clear					
Scripts will be sig	ned now, and any tokens will print now.						
Script Printing							
Select what to do	with script(s)						
Init/Sign & Send Now							
Print/Sign & Send Later							
Do Not Print	Them						
	Settings Qk Cancel						

This will take you to the **Authorise Spine Prescription** screen to **tick the medication in the list** to proceed.

Y Authorise Spine Prescription	X
The system will sign the content displayed here on your behalf, by means of as an Advanced Electronic Signature. By entering your PIN here you affirm yo these prescriptions. Do you wish to proceed?	information stored on your smart card ur intention to digitally sign and issue
Prescription details	Sign
Mrs Patient Name (NHS Number) Time: 02 May 2013 13:18 Author: Dr Who Nominated pharmacy: Brent Pharmacy, 214 High Street, Brentford, Middlesex	TWIS BAH
ETP Prescription number 1 Bendroflumethiazide 2.5mg tablets 28 tablet (EVERY DAY) Repeat dispensing item - number of issues: 6	All medications on the list <u>must</u> be checked and the Sign tick box <u>must</u> be selected to proceed.
ETP Prescription number 2 Simvastatin 20mg tablets 28 tablet (TAKE ONE AT NIGHT) Médormin Söömg tablets 11 2 tablet (take 2 Twice Daily) Losartan 50mg tablets 28 tablet (take one daily) Gluicaide 80mg tablets 28 tablet (take one daily) Repeat dispensing item - number of issues: 6	
	*
PIN	

Once the medication has been ticked, you can enter your smartcard number as the pin and the prescription will go to the nominated pharmacy electronically.

#### The Clinical Record

#### Patient Search

There are 3 ways to search for a patient:

- F10 quick function key
- Patient Menu Quick Patient Search
- Search icon (magnifying glass) on the toolbar

The **search field** prompts for Name, however you can search by date of birth, name or (part of name) or NHS number if you have it.



NHS number is best practice and performs an accurate search as this the patient unique identifier.

- Searching by name sometimes shows different status colours for the results, as shown below:
  - **Black** permanent GMS patient.
  - Grey Deducted patient. Note: You must have selected the Include deducted patients option for deducted patients to be shown in your search results. Hover over the grey X to display date of deduction. Deceased patients will have a tombstone next to their details, hover over to show date of death.
  - Orange Test patient.
  - **Green** Patient applied for GMS.

Name search a	mith		<b>.</b>	Search	<u>H</u> istory	Thi	s A <u>d</u> dress	Not	Found	<b>*</b> Ad <u>v</u> a	anced
Include dec	lucted patients	🗹 Include tes	st patients Site	All Sites					Ŧ	Columns & Setti	ngs
Date of birt	h		🗌 Ir	nclude patients only	registered for remo	ote bookin	g 🗌 Search or	previous :	surnames		
NHS Number	First Name	Middle Names	Surname	DOB	Information 🔨	Sex	House Name	House	Road		Postco
	Emma		Smith-TestP	01 Jul 1997	т	F		722	Prince Of	Wales Road	S9 4E
	Lisa		Smith-TestP	01 Jan 1970	т	F		12	Exmoor S	Street	W10 6
	Samantha		Smith-TestP	08 Nov 1980	т	F	11		Exmoor S	Street	W10 6
	Bob		Smith	10 Aug 1940	×	Μ		91	Sunnyfiel	d	NW7
	Lena		Smith	01 Jan 1980	×	F		2	Longridg	e Lane	UB1 3
	Aaron		Smith	22 Jun 1980		М		50	Fitzhugh	Grove	SW18
	Caroline		Smith	24 Dec 1986		F	12		Warwick	Road	E15 4
	Harry		Smith	02 Jan 1980		М		54	Munster/	Avenue	TW4 5
	John		Smith	01 Jan 1951		М			Exmoor S	Street	W10 6
	Linda		Smith	10 Feb 2017		F		1	Sunnyfiel	d	NW7
9990533474	Mary	Ann	Smith	15 May 2019		F		10	Friston S	treet	SW6 3
	Peter		Smith	16 Mar 1990		М	26		School R	oad	C012
	Robert		Smith	15 Mar 1986		М	The Chelsea		Flood Wa	alk	SW3 5
	Sam		Smith	01 Apr 2000		м					7799

#### The Patient Demographics Box

- When you retrieve a patient record the demographics box will display patient details in the top right hand corner of the screen.
- You can open multiple records, up to 4 records at one time, however there will be a **red** border around the demographics box. <u>Use with caution</u>, make sure you are working in the correct patient record.
- If you want to switch between open records, right click on the demographic box to toggle between patients.



- To re-open a patient record, you can go to **Patient Menu Recent Patients**. This will retain the last 15 patients records that you have retrieved.
- **Discard** Red bin, this will not delete the record, simply closes the record without saving any changes.
- Hover over the demographic box additional information is displayed nominated pharmacy, usual GP, alternative correspondence address and telephone numbers. You can also see other organisations if the patient is being seen elsewhere.

#### Patient Status Alerts

Patient status alerts are designed to draw important information to your attention when you retrieve a patient record, e.g. smoking status, asthma. These status alerts will vary for each patient.

Left Hand Side of the Divider	<b>Right Hand Side of the Divider</b>
SystmOne alerts	Local NWL/Practice alerts

- Once you retrieve a patient's record.
- Hover over a couple of the patient status alerts to show what they mean.
- You can sometimes click on them this depends on how they have been set up, e.g. Smoker
   will take you to the smoking template.
- Some Patient Status Alerts appear on the **Patient Home** screen. The **Action** link may take you to a specific clinical template.

#### Trees

On the left hand side of the patient record, there are "Trees" – **Clinical** and **Administrative**.

- 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.

If you right click on a node, a menu will appear with various action buttons. Usually the first option is to "add" or create a new entry.

**Note:** The exact nodes in each unit will vary according to how it is configured.

#### **Clinical Tree Nodes**

#### Patient Home

When you retrieve a patient record, the Patient Home view is always displayed which contains relevant outstanding actions.

The coloured pane on the right hand side is always there anywhere in the record, click to open a view and action window.

#### **Quick Glance**

This is known as a view and are created to include specific information within patient records, they can be set up by your practice.

This view provides a basic summary of the patient record and can be printed out (**right click** on the node – **print summary**).





Click on the down arrow on the Quick Glance node to expand the options.

View the different summaries available and click back on the up arrow to collapse the node.

#### Special Notes

Special notes are like a reminder but are visible regardless of sharing preferences, if there is a special note within the patients record you will see the icon in the demographics box and the node will be highlighted.

There are three types of special note:

- Special Note to alert other care providers that the patient has a palliative diagnosis.
- **Safe Haven** to alert the care provider to any potential danger they may be in when seeing the patient (e.g. potentially violent patient or patient has a violent relative).
- Frequent Callers to identify patients who frequently call the service.

#### Entering a Special Note

- Right click on the **Special notes** node select **New Special Note**.
- Choose the **Type** of note you would like to enter.
- Ensure date and time is correct.
- Enter a special /safe haven/frequent caller note into the patient record.
- Click **OK** to save the New Special Note.



- > X allows you to expire a current Special Note if it is no longer relevant.
- **Red bin** allows you to delete the Special Note.
- Nothing in the patient record should be deleted or marked in error unless it was incorrectly added, e.g. in the wrong patient record.
- You can also view expired and deleted special notes by adding ticks in the boxes.

#### Problems

These are read coded entries that have been assigned as a "problem".

Green flags – current/active problems. Red flags – inactive problems.

If you click on them they will display all entries linked to that problem (Minor and Major).





Local Data | GP Data | Community | Urgent Care | Everything | 🕂

Read coded entries are very important as free text cannot be reported on, for example data collection for payment, e.g. Enhanced Services. Also read code reporting was used to collect national data during the pandemic. This helps keep to a standard recording rather than free text.

#### Journals

#### Tabbed Journal

Urgent Care

Everything

The Tabbed Journal allows you to view the patient's medical history in tabbed entries.

If the patient has a long record this will be split into multiple pages which can be navigated with the arrow keys at the bottom of the page.

Tabs at the top of the page allow you to filter the record.

TabDescriptionLocal DataShows data added by the current organisationGP DataShows data added by SystmOne GP organisationsCommunityShows data added by SystmOne community organisations

Shows data added by SystmOne urgent care organisations

Shows all data available to the current organisation in date order

You can create personal tabs which are only available on your profile. Click the + at the end of the tabs. A pop-up will then appear allowing you to enter a tab name and tab icon, then you can select that you want that tab to show, e.g. events recorded since my last event.

To delete your personal tab, you can right click on the tab and select **Delete Tab**.

You can also use the **Search** field to search for a specific word in the journal, e.g. **Medication** and click **enter**. This will display only entries with the word medication.

There may be some information that should not be visible for the patient to see when using System Online. To hide information, click and highlight the entry and click on the **Online visibility icon** and then click "**Do not show in the online record**".

If a record is not visible to the patient, the icon will appear on the right hand side of the data entry.

If you feel the event should be kept private from other healthcare settings, click the "**Mark Event as Private**" icon. This will allow colleagues within the organisation to see the entry, but it is not visible to those outside the organisation. A red cross will be added next to the entry to indicate this.

A red cross will be added next to the entry to indicate this.

Users who are not able to see the information will see a red cross in the patient demographics box which indicates that some information is missing from their view of the record.

Only staff members who have safeguarding access rights on their smartcard can view this event in the patient's record.







The Filter option allows you to create and save a filter so that you can use it in different patient records.

- 1. Click on the *click* icon.
- 2. The Manage Filters dialog is displayed.
- 3. Click New Filter.
- 4. Select the appropriate options from the **Filter Configuration** dialog (e.g. deselect all and only show **deleted items** or **data entry templates**).
- 5. Click OK.
- 6. Type a name for the filter and click **OK**. The filter is listed on the **Manage Filters** dialog.
- 7. Click **OK** to return to the Tabbed Journal. The filter is now available for quick selection from the Custom Filter drop down list.

To **remove** a filter - click on the full filter (**Show everything in the journal**) To **delete** a filter – click on Manage Filters (pencil icon) and select **Delete Filter**.

The Tabbed Journal appears in date order with the most recent entry appearing at the bottom. This cannot be changed, unlike many areas in SystmOne where you can change the order. There are page navigation arrows at the bottom of the Journal and the date of the entries appear on the bottom right hand side.

The centre of the screen shows the time and who added the entry and the content. There are different colours denoting different entries in the Journal:

<u>Colour</u>	Different Entries
Green	Generally coded information
Black	Generally free text
Brown	Medication
Blue	Template entry

The far right icons give more detail about the entry if you hover over them, e.g. face to face, linked to an appointment.

#### New Journal

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

Within the **New Journal** – **Custom Filter**, you can quickly see what is visible in the patient's online record.

**Online Full Clinical Record** – This type of access will include all of the information seen for those patients with Detailed Coded Record Access but will also allow you to read free text entries in your records and attachments such as hospital letters.

**Online Detailed Coded Record** – This will include access to view all the clinically coded information in patient's records – such as problems, procedure codes, diagnosis, medication, test results, immunisation and allergies. Patients will be able to see when a referral has been made or a letter received, but not able to read the contents of the letter. Clinical codes will give you information about what that consultation or entry was in relation to without the very specific information that the doctor or nurse typed into your records.



#### Code Journal

The Code Journal allows you to view a list of all the Read codes that are present on the currently retrieved patient record.

The number in brackets indicates the number of journal coded diagnosis contained in the Code Journal. You can sort the list of read codes displayed by clicking on the column headings in the list.

The coded entries view is displayed by default but you can select the View drop down list to specify what coded entries you want to view.

	View Summary coded entries *
	Summary coded entries
rt the	Journal coded entries
	Numeric coded entries
	Non-numeric coded entries
view.	Problem coded entries
	n (Xa1sNon-problem coded entries
	All coded entries
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ion	
the natio	nt record cummary are

Definition
Only read coded entries that appear in the patient record summary are
displayed (these entries are <b>blue</b> and have the 📋 icon next to them).
Only read coded entries that appear in the Journal as journal diagnoses
are displayed.
Only numeric read coded entries are displayed.
Only non-numeric read coded entries are displayed.
Only read coded that have been added as problems are displayed.
Only non-problem read coded entries are displayed.
All entries in the patients record that have an associated read code are
displayed.

Select your preferred view and select **Save** so that this will be your default view every time you retrieve a patient and look at the Code Journal.

#### **QOF** Timeline

The QOF timeline view in the patient record allows you to identify and manage any QOF work that needs doing for a specific patient.

The timeline shows the progress against each indicator applicable for this patient. The bars are colour coded to allow you to easily identify the status of the patient for each QOF indicator: **Green** – those which have already been achieved for this QOF year.

Grey – those from which the patient is excluded.

**Red** – those which have actions outstanding in order for them to be achieved for this QOF year. You can right click in the red area to record achievement or exclusion or to view the achievement paths.

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#### North West London

If an indicator needs to be actioned within a specific timeframe (e.g. it either needs to be added before a certain date, or does not need to be added until after a certain date), this is shown by a shortened bar that starts or ends at the corresponding date on the scale. The tooltip for the indicator shows the exact date period in which the indicator must be actioned for the patient to be achieved.

#### Medication

A list of all the patient's medication is shown here in order of date prescribed. These can be ordered by clicking on the titles by drug name or medication type.

- Repeat medications will be identified in the flag column by this 🦉 icon.
- Non-GP medications such as hospital or dental prescribed medication will be identified by a H icon or R dental icon.
- The view can be used to change to **only view current medication** or the **last 6 months** of medication or a simple **summary** of all medications given.

Right clicking on the medication will give you a drop down list of all the options needed to deal with a medication request.

#### **Repeat Templates**

Shows all medications currently on a repeat prescription. This view can be filtered on the right-hand side to show **current**, **past** or **deduction ended** repeats.

View	All repeats 🔹 1
	All repeats
	Current repeats
	Past repeats
lags	Deduction-ended repeats

- Right clicking on the medication gives all the functionality in order to deal with repeat prescription requests.
- The number of repeats issued will show on the right hand side of the medication. Once the patient has reached the maximum number of repeats, they must be reviewed.
- The compliance indicator gives a visual indication of whether the patient is collecting their repeat script at the correct intervals and hence whether they are taking their medication as prescribed. The indicator will turn from green to orange or red if not compliant.

Flags can be applied to indicate if a medication has reached a review date or is a controlled medication in the right-hand column.

#### Sensitivities & Allergies

You can record if a patient has any sensitivities or allergies in this node.

#### To record a sensitivity or allergy

- Retrieve the patient record.
- Navigate to the Sensitivities & Allergies node.
- Right click on the node and select Record Allergy or Sensitivity.
- Enter details of allergen (e.g. drug, food, substance)
- Record the onset date of allergy if known.
- Save the allergy information into the patient's record.

7 Record	Sensitivity or Allergy
Other Details	Exact date & time * Tue 06 May 2025 * 13:38 📕 🗙
Changing t	he consultation date will affect all other data entered. To avoid this, cancel and press the "Next" button Hide Warn
Record 01	in known allernies 1151
01	rug sensitivity
0	
Daus 📑	F PENCILLANNE
_s	ensitivity is specific only to this manufacturer's product in this formulation
	Back on face and arms
Comments	reash on race and anns
Start date	06 May 2025 🔻
	Check current medication against sensitivity Save this setting for next time
	Ob Ob 2 Analise Council



#### **Communications & Letters**

All scanned and electronic generated letters appear here.

#### There are 4 tabs:

<u>Tab</u>	<u>Shows</u>
All	All communication
Incoming	For communications received by your organisation or other organisations
	that share the patient record
Outgoing	For communications sent by your organisation or other organisations that share the patient record
Other	For all other communications

The columns can be re-ordered by clicking on the column headers.

#### To create a New Letter

- Right click on **Communications & Letters** node.
- Select New Letter.
- The Select Sender & Recipient Type dialog opens.
- Sender This Organisation.
- **Recipient The patient** (*save as default*).
- Ensure Editor is MS Word.
- Choose Letter Type this is very important, the system defaults to A&E.
- Choose **Template** (Select a NWL template
- Select Write Now.

🍸 New Lette	r	×
Other Details	Exact date & time * Tue 06 May 2025 *	13:38 X
Changing the	consultation date will affect all other data entered	d. To avoid this, cancel and press the 'Next' button Hide Warning
Recipient		
Name	Ms * Anna	Middle Names Anderson
Organisation		
House name		Address Book
Road	116 Chaplin Road	Directory
Locality		Telephone 07825 256955
Town	Wembley	Fax
County	Middlesex	
Postcode	HA0 4UZ Find Add Map	
Sender		
Name	<ul> <li>First Name</li> </ul>	Middle Names Surname
Organisation	CWHHE Training	
House name		Address Book
Road	15 Marylebone Road	Directory
Locality		Telephone 020 3350 4050
Town	London	Fax
County		
PUSICODE	Pind Add Map	
Editor (	SvetmOne MS Word	
Template 0	hoose Template	etter re Patient Registration doc
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	Write Now Create Ta	sk to Write Later Cancel

- Enter the contents of the letter and either:
  - Save For Future Editing This allows you to edit the contents of the letter at a later stage. There is no date and time in the Date Finalised column.
  - Save Final Version This PDF's the letter and you cannot edit in the future once the letter is finalised. There will be a date and time in the Date Finalised column.



Ore patient     Ore patient     Ore angement OP     Order's negatient AC     Ore angement AC     Ore or patient angement AC     Ore or patient angement AC     Order's negatient AC     Order'	One patient     @ The pagenet       @ The argenisation     O The expansion       O Inderts registered OP     O Need of Ne       O Need of N     O Need of Ne       O Peterts values     O Peterts values       O Return in the interval of D     O Returning       O Returning     O Returning       O Returner     Save as Detatul       Os     Cancer	The applied     The appli	O A Systillorie User		C A Systemotive user	
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A textual recipient
 An entry in the address bool



• Right click on any letter and **View Content**.



#### Referrals

This allows you to view details of a referral from the patient record.

Two tabs are displayed:

- Referrals In A list of referrals recorded as received for the patient are shown here.
- **Referrals Out** A list of outgoing referral for the current patient (outgoing referrals include those sent by your organisation and also those sent by any other organisations with access to the patient record).

Within the Referrals Out Tab:

View:

- All referrals View a list of all outgoing referrals.
- **Referrals to here** –Include outgoing referrals intended for your organisation.
- **Referrals to elsewhere** Include outgoing referrals intended for other organisations.

View	All referrals	•
Create	All referrals	
17 Ju	Referrals to here	
	Referrals to elsewhere	

Show open referrals – Include open referrals in the list displayed.

**Show closed referrals** – Include closed referrals in the list displayed (you must select this option in order to view any referrals marked as ended).

#### **Record Attachments**

This node allows you to view and manage and files that are attached to a patient record, e.g. photographs, ECG files.

It is possible to attach electronic files of up to 5Mb in size to a patient record.

#### To add a file

- 1. Retrieve the patient record.
- 2. Right click on the **Record Attachments** node.
- 3. Select Attach Files.
- 4. Locate your file from the saved location.
- 5. You can remove files from this screen as well.
- 6. You can link the file to a **problem** using the green flag on the top right hand side of the **New Attachments** dialog.
- 7. Add any comments if required presets can be created if using frequently.
- 8. Select a **Type** from the drop down list if required.

9. Click **OK** to save into the patient record.

🍸 New Attack	hments					×
Other Details	Exact date & time 👻	Tue 06 May 202	5 👻 13:38	Hypertensi	on (XEOUb)	
Changing the o	consultation date will affe	ct all other data	entered. To a	woid this, cancel and pre	ess the 'Next' button	Hide Warning
Add Files	File Name 🗸	File Type	Size	Comments	Туре	
Remove File	ECG image1.png	PNG Image	19.7 KB	Left axial deviated	ECG	
Presets	Left axial deviated					
_						
Туре	ECG					· ·
		<u>O</u> k	Ok & Another	Cancel		

The file is attached to the patient record and the filename of the attachment will be visible in the **Tabbed Journal** (right click on the entry and **View in Windows**).

You can also drag and drop to attach files to a patient record.

#### Pathology & Radiology

#### Left Hand Pane

Displays pathology/radiology reports by individual tests in the left hand pane:

- Report issue date.
- Battery headers e.g. Biochemistry, Histology.
- Specimen collection date if present in the message sent from pathology lab/radiology department.
- Report type e.g. pathology/radiology.

You can filter the reports displayed by report type, using the **View** drop down list at the top of the view.

— View	All 👻
ttery Headers	All
С	Pathology
est Xray	Radiology
	Blood Spot
	Screening

To view details of a particular report type, **expand** the **Pathology & Radiology node** and then expand the relevant sub node, e.g. **Haematology – FBC**.

If you **right click** on a **pathology/radiology report** in the **left hand pane**, you have further options in relation to that report.

#### Upper Right Hand Pane

Displays general details including:

- The result indicator, e.g. Normal, Abnormal, Unknown.
- Any comments entered while filing.
- Who filed the report.
- Date of filing.

When a report has been archived and the patient informed, it is displayed in grey text on the Pathology Radiology view.



**Note:** Once a pathology/radiology report has been archived, it cannot be amended.

#### Lower Right Hand Pane

Gives details of the individual numeric results.

#### Vaccinations

Details of all vaccinations are implicitly shared to child health services, health visitors, school nurses, community services, district nurses and GP's unless the patient has given explicit dissent at the service where the vaccination is recorded.

#### To add a vaccination

- 1. Right click on the Vaccinations node.
- 2. Select Record Vaccination.
- 3. Select Vaccination from the drop down list.
- 4. Enter **details** of the vaccine (e.g. batch number, date administered).
- 5. Record any relevant notes (e.g. site of administration, method).
- 6. Click **OK**.

#### Childhood Vaccination Grid

**Show/Hide Childhood Grid** provides a clear, organised display of a child's vaccination schedule and history. It allows healthcare providers to easily monitor and track a child's immunisations, ensuring that they are up to date with the national immunisation schedule.

- The grid presents a visual table with **vaccine names** on one axis (rows) and **age ranges** or specific intervals (months/years) on the other (columns).
- Each cell represents a vaccine that should be administered at a specific age or time interval.
- The grid uses colour coding to show the status of each vaccination:
  - o **Green** Completed vaccinations.
  - **Red** Overdue vaccinations.
  - **Yellow** Scheduled or upcoming vaccinations.
- It includes routine childhood immunisations recommended by public health bodies, e.g. 6 in 1 vaccine, MMR, meningitis vaccines.
- Clicking on a vaccine within the grid can provide detailed information such as the vaccine batch number, date of administration and any recorded reactions or notes.

Vaccinat	tions							
💉 😿 🤰	2 🛷 🕽	🎗 % 🛠 Sho	w/Hide Childhood Grid	Show/Hide Information Bar	New Template Using	Selected		
-HPV Vacci	nation	The SystmOne	Vaccinations Grid sho	ws the current national r	outine vaccination sch	edule for a baby enteri	ng the vaccination pro	cess now More details.
15vrs	1	Vaccination	8 wks	12 wks	16 wks	12 mths	40 mths	13-18 yrs
15yrs 1m	2 👗	Diphtheria	1 🗸	2	3		В 🗸	В
15yrs 4m	3 🔺	Tetanus	1 🗸	2	3		В 🗸	В
L		Pertussis	1 🗸	2	3		В 🗸	
		Polio	1 🗸	2	3		В 🗸	В
		HIB	1 🗸	2	3	В		
		Hep. B	1 🗸	2	3			
		Pneumococcal	1 🗸		2	3		
		Rotavirus	1 🔺	2 🔺				
		Men. A						1 🔺
		Men. B	1 🔺		2 🔺	3 🔺		

#### Administrative Tree Nodes

#### Patient Details

This node allows you to amend a patient's details.

You can amend the following:

- Amend Name
- Record New Address
- Record Contact Details
- Send Email/Send Verification Email
- Record Contact Method

#### Groups & Relationships

You can record a relationship between the patient and a person (medical or non-medical).

The following filters are available, which are designed to help you find the relationship type you are looking for quickly:

All – Allows you to view all categories of relationship.

**Family** – Various personal relationship categories are listed, e.g. parents, extended family. **Medical** – Non-personal relationship categories are listed, e.g. community nurse, school teacher, Macmillan nurse.

**Other** – If you are unable to find a suitable relationship type, you can select Unclassified e.g. probation officer, carer, person of religion, commissioned advocate.

#### Recording a New Relationship

- 1. Right click on the Groups & Relationships node.
- 2. Select Record Relationship.
- 3. Select the relationship from the **Select Relationship Type** dialog (using the Primary filter, secondary filter, relationship types).
- 4. Click OK.
- 5. Select the appropriate option from the New Relationship dialog.
- 6. Select the **relationship type** and appropriate options.
- 7. Click **OK** and add a **reciprocal relationship** is required and click **OK**.

#### Tasks

This is accessible via the **Appointments**, **Visits and Tasks** node in the Administrative tree, expand the arrow and select **Tasks**.

There are two tabs available:

**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 yet sent. They will be sent automatically when you save the patient record. These tasks cannot be processed (e.g. actioned or







marked as "completed") until they have been sent. To cancel a pending task, right click on it and select **Cancel Pending Task**.

Task History   Pending Tasks									
Organisation CWHHE Training, NHS Central London (Westminster) CCG 🔻									
Date ~	Day	Ву	For	Task	Status	Start Date	Due Date	Flags	
10 Feb 2016 14:56	Wed	S Benge	S Benge	New Patient Record Check	Completed	19 Apr 2016		P	
03 May 2016 15:48	Tue	S Benge	Admini	See task and action as appropriate	Completed	03 May 2016		Ρ	
18 May 2016 10:47	Wed	S Benge	All Staff	See task and action as appropriate	Completed			P	
20 May 2016 09:09	Fri			Patient Accessed	Completed			$P \downarrow$	
23 May 2016 09:50	Mon			Patient Accessed	Completed			2	

#### **Med3 Statements**

The Med3 note functionality allows you to record and print Med3 statements that are assured by the Department of Work and Pensions.

#### Issuing a Med3 Statement

- 1. Right click on the **Med3 statements** node.
- 2. Select New Med3 Statement.
- 3. Select the appropriate option:
- 4. Not fit for work the appropriate Read code will be added to the patient record.
- 5. **May be fit for work** the appropriate Read code will be added to the patient record.
- 6. Record a diagnosis:
- 7. Click **Select coded diagnosis** to use a Read code that is already in the patient record, or Record New.
- 8. Click **Free text diagnosis** to add a new free text to the patient record and use it on this Med3 statement. The free text will be added to the patient record at this point.
- 9. Type in any **comments** required or click Presets to set up/use.

7 Record MED3 statement									
Other Details	Exact date & time 🔻 Tue 06 May 2025 💌 13:38 🗮 🗙 Hypertension (XEOUb)								
Changing the c	consultation date will affect all other data entered. To avoid this, cancel and press the 'Next' button	Hide Warning							
MED3 code	eMED3 (2010) new statement issued, not fit for work								
	Vot fit for work								
	May be fit for work								
Diagnosis	Select coded diagnosis     Free text diagnosis								
	Select Record New Chronic low back pain								
Comments									
	Phased return Altered hours								
	Amended duties Adaptions								
Valid from	06 May 2025 🔻								
'Statement valid	● for period * 2 🗘 * Weeks 👻 〇 until date								
	o for six months o indefinitely								
	Follow-up assessment required on 13/05/2025								
'Issuer		_							
	Insued by band								
	Lissued by nand								
rimi, sella									
	Send to patient electronically								
	Ok and Print/Send Print Preview Printer Settings Cancel								

- 10. If required, select the options available if you have assessed the patient as **May be fit for Work** (e.g. phased return, altered hours, etc.)
- 11. Record the appropriate date in the **Valid From** field.
- 12. Record a duration in Statement Valid field (for example for period 2 weeks).
- 13. Select **Follow-up assessment required** and record a date if the patient needs to be assessed again.
- 14. The issuer will have your name in the field.
- 15. Click the appropriate button:
  - Issued by hand allows you to record that a paper Med3 statement has been issued to the patient, showing the details selected on this dialog. The appropriate Read code will be added to the patient record. This adds a tick to Print as well and there will be a "Issued by hand" watermark on the Med3 statement when you print it.
  - **Print** This allows you to print the Med3 statement.
  - Send to patient Electronically This allows you to send the Med3 statement to the patient via the Communications Annexe.

Print preview allows you to view a preview of the Med3 statement.