South, Central and West
Commissioning Support Unit

IT Training and Support Prospectus

SCW Digital, Data and Technology

EMIS Web 2023-2024

Document Control

Whilst this document may be printed, the electronic version is the controlled copy and we would strongly advise that, wherever possible, you use the electronic version of this document.

Any printed copies of this document may have passed out of control and should be checked for accuracy and validity. The content of this document is correct at the time of writing.

The IT Training Team is committed to meeting the ambitious Net Zero Carbon NHS targets and supporting our NHS Customers to do the same. See SCW's Green Plan - Green Plan - NHS SCW Support and Transformation for Health and Care (scwcsu.nhs.uk)

Contents

Welcome

This prospectus provides a guide to the IT training and other related services and resources we offer our customers in Primary healthcare. Our experienced and professional IT training and support team deliver comprehensive clinical and non-clinical systems training and support, systems optimisation, and data quality services.

What training we deliver

- Clinical systems training:
  - New starters
  - Clinical / non-clinical staff refresher system training
  - Systems optimisation
- Data quality services:
  - Medical terminology
  - Clinical coding
  - Note summarising
- NHS National systems and Spine applications (eRS, eRD, ePS, GP2GP) training and support
- Microsoft 365 end-user training and support
- Support with third-party software, e.g., Ardens, AccuRx, Docman, etc.

GP practice and PCN IT training

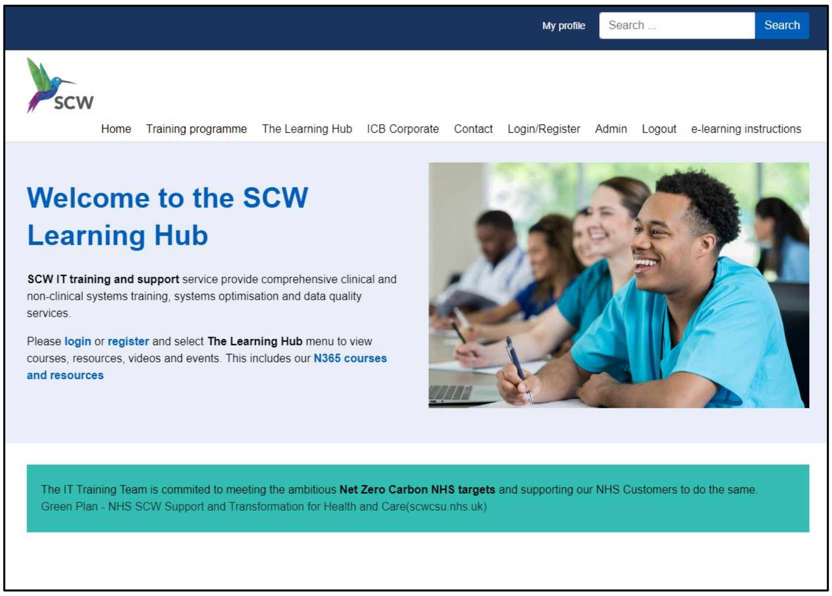
The IT training programme for 2023/24 is provided by your ICB in support of clinical system optimisation, and there is no charge to your GP practice or PCN. Analysis of data from previous years, as well the demands of ever-increasing digitisation within healthcare, have informed us that training at GP practices and PCNs needs to focus on these key areas:

- Core clinical system
- Data quality
- System optimisation
- National programme
- N365
- MS Teams

How we deliver our training

- **Live online**
- Webinars
- Videos
- Quick reference guides
- Face-to-face (on request)
- e-Learning
- User guides
- Telephone support

The Learning Hub



To find out more about who we are and what we do, go to **The Learning Hub** https://training.scwcsu.nhs.uk/

Our team provide comprehensive clinical and non-clinical systems training, systems optimisation, and data quality services.

Please login or register and select **The Learning Hub** menu to view courses, videos, and events. This includes our N365 courses and resources.

My Learning Record

The Learning Hub provides registered users with their own personal learning account, **'My Learning Record,'** enabling them to keep track of courses they have attended, courses they are booked onto, as well as a record of the progress they have made with the e-Learning they have enrolled on. To find out more about your own Learning Record, login to the Learning Hub, go to The Learning Hub menu, then select My Learning Record.

e-Learning

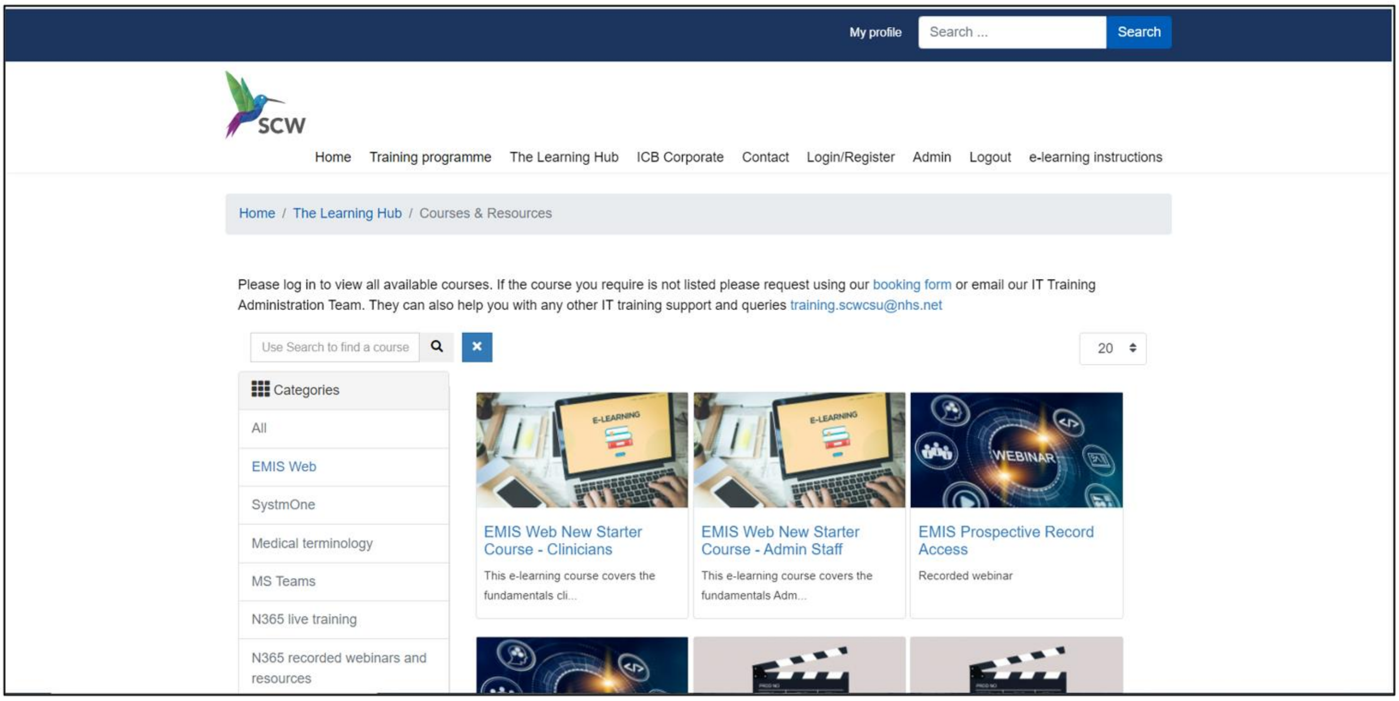
We now offer e-Learning for a variety of topics, via our Learning Management System (LMS) on The Learning Hub, alongside our live training. Just login to The Learning Hub and you're ready to go!

Why use e-Learning?

- Convenience - available any time, no need to book, or worry about joining a Teams meeting
- Users can learn at their own pace, and repeat key content to reinforce learning
- Courses take approximately 2 hours to complete and are broken down into bite-sized modules, taking between 2-10 minutes
- Users can keep track of their e-Learning progress, see which content they've already completed, skip content they're familiar with, and go back for a refresher

To see what e-Learning courses we have, go to The Learning Hub, Courses & Resources, and look for the e-Learning tiles in each category.

Recorded webinars and videos



We have an extensive selection of short training videos and recorded webinars, available on The Learning Hub to view at a time convenient to you. Topics are wide-ranging, from searching for a patient to concepts and protocols; and all our videos are accessible from any location.

Go to The Learning Hub, Courses & Resources, then search by category and look for the recorded webinar tile:

Three ways to book your training session

- Email our Admin team at training.scwcsu@nhs.net with your request
- Visit The Learning Hub http://training.scwcsu.nhs.uk/ and use the Course Booking Form
- Call our Admin team on **0300 561 2828**, 8:30am to 4:30pm, Monday to Friday

For most training enquiries it would be helpful if you could include the following information:

- Topic(s) required

For each attendee:

- Name, email, and role
- Start date if requesting New Starter training
- Working pattern if not full-time

Our friendly team will be able to advise you on what training is available and help you identify the training that best suits your requirements.

Live training sessions and webinars via MS Teams

For most of our live training, and all our webinars, we are using MS Teams. A pre-booked live training session lasts around two hours and is interactive (i.e., Q&A, hands-on demos, etc.) wherever possible.

Our live webinar sessions cover specific clinical system functionality (e.g., EMIS Workflow management, eRS worklists, etc.), and are available to all our customers. Live webinar sessions last approximately 45 minutes to 1 hour and attendees can ask questions as part of the demonstrations. Many of the live webinar sessions we offer have a recording posted on The Learning Hub.

Please let us know if you like us to deliver any of our training face-to-face – in most cases, where we can, we will be happy to do so!

IT training support available Mon-Fri, 9am – 5pm

To request IT training support:

- Send an email any time to our Admin team at training.scwcsu@nhs.net with your query, including the best way to contact you

- Call our Admin team on **0300 561 2828**, 8:30am to 4:30pm, Monday to Friday, with your query - *there is usually a trainer available to deal with your query from 9am to 5pm*

As well as pre-booked training we also provide direct one-to-one telephone and virtual support, for ad hoc queries and training needs. This service is available during office hours, and your call will be assigned to one of our experienced trainers, who will contact you directly to assist.

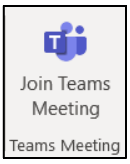
Getting ready for your Online Training Session

To ensure that the training can take place and to help make the most of your session, please follow these steps:

1. Open your Outlook or NHS Mail portal and accept the calendar appointment for the booking, which contains an MS Teams link
2. If possible, ensure that you will have somewhere quiet and undisturbed for the training session and check that the PC (or laptop) has a working internet connection and (if required) access to the clinical system being trained
3. For the best learning experience, to access MS Teams audio, we recommend you use a headset (or mobile phone earpiece) connected to your PC/laptop, where at all possible. However, you should still be able to use the audio/microphone built into your PC/laptop. Alternatively, you could use a desk phone to call the number in the calendar appointment – please let our Admin team know, or make the trainer aware, if you are having problems accessing sound or using your microphone
4. **In advance of the training**, check that you are correctly logged in to the desktop (App) version of MS Teams (please see instructions below) and make a test call (see next step)
5. Click the ellipsis (…) next to your Profile image/initials (top right-hand corner) and choose Settings > Device > Make a test call

On the day of training, preferably a few minutes before, click on the link to join the Teams meeting, or select the Join Teams Meeting button from the ribbon (if you are using your Outlook calendar)

Click here to join the meeting



Making sure you are signed-in to MS Teams Desktop App (NOT using a Browser)

1. **If you don't have a Teams icon on your desktop, please contact your IT support for installation – we do not recommend you use a browser to access our live online training**
2. If you are already in Teams, click your Profile in the top right-hand corner and select **Sign out**
3. Double-click the Teams icon on your desktop (if it doesn't auto-start)
4. Teams may try to use your Windows account to sign in with – please ensure you use your NHS Mail email address – this is the email address with **@nhs.net** at the end
5. Click Sign in and enter your NHS Mail password
6. If it is requested (i.e., if you have MFA enabled), enter the 6-digit code sent to you by text or email
7. You will now be correctly signed-in to MS Teams and will be able to use the full Teams functionality as part of your live online training experience!

How to share your screen during the training session (where appropriate)

Your Teams toolbar is usually at the top right corner of your Teams screen, but if you have the older version of Teams, it will be at the bottom centre of your Teams screen, and you might need to 'wiggle' your mouse to view it.

1. Click the Screen Sharing icon in your Teams toolbar (the icon looks like a rectangle with an arrow in it – there have been a number of changes to the design!)
2. Your Teams screen will display your sharing options on the right-hand side
3. Select the **Screen** option **NOT** the Window option
4. You will now be sharing whatever program you have on that screen (and can move anything across from one screen to another if you have more than one)

Please contact our Admin Team if you have any questions or need any help ahead of training, including the option of a short test call with the duty trainer

New Starters training programme

New Starter training for non-clinical staff

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

- New starters in administrative roles, e.g., reception/prescription teams
- Other members of staff who need to view but not add patient information
- We recommend that new members of staff attend this training within three months of starting

Aim

The aim of this course is to enable users get an introductory overview of EMIS Web and familiarise themselves with the functionality they will need to use

Learning Objectives /Outcomes – at the end of the session learners will be able to:

- Demonstrate the importance of logging into the system with a Smartcard
- Configure the home screen to optimise access to key modules for the user
- Navigate between and recognise various modules in EMIS Web
- Demonstrate an understanding of where to find specific information within a patient Care Record
- Find a patient using a variety of search methods
- Manage appointments using the Appointment Book module
- Edit patient registration details
- Add data to the Care Record
- Manage patient tasks using the Workflow Manager
- Issue and request medication and demonstrate using the drug history option

We strongly suggest that, where possible, you schedule this training within the

first week to a fortnight of your new member of staff being in post

New Starter training for clinical staff

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

- New starters in clinical roles, e.g., GPs, nurses, F2s, pharmacists, etc.
- We recommend that new members of staff attend this training as soon as possible after starting

Aim

The aim of this course is to enable users get an introductory overview of EMIS Web and familiarise themselves with the functionality they will need to use

Learning Objectives /Outcomes – at the end of the session learners will be able to:

- Demonstrate the importance of logging into the system with a Smartcard
- Configure the home screen to optimise access to key modules for the user
- Navigate between and recognise various modules in EMIS Web
- Find a patient, access the patient Care Record, and add a consultation
- Manage their appointments using the Appointment Book
- Manage patient tasks (e.g., lab reports, medication requests, etc.) using the Workflow Manager
- Add, issue and review patient medication

We strongly suggest that, where possible, you schedule this training within the first week to a fortnight of your new member of staff being in post

Primary Care IT Induction (PCITI)

Method of Delivery

Live webinar via MS Teams

Duration

1 hour

Who is this course for?

Primary Care staff who have recently joined a GP practice from outside of the NHS

Aim

To provide an overview of Primary Care, and how IT is used in GP surgeries

Learning Objectives / Outcomes

At the end of the session learners will be able to understand:

- Know when and why the NHS was created
- Identify the three core levels of care
- Understand how IT systems contribute towards patient safety and care
- Recognise the key process of the GP2GP transfer and registering new patients

We strongly suggest that, where possible, you schedule this training within the first week to a fortnight of your new member of staff being in post

An Insight into General Practice Webinar

Method of Delivery

Live Webinar via MS Teams

Duration

1 ½ hours

Who is this course for?

Anyone working alongside or supporting General Practices

Aim

To increase the learners' knowledge and understanding of the inner workings of General Practice

Learning Objectives / Outcomes

At the end of the session learners will be able to understand:

- How a GP partnership works
- What a typical General Practice staff structure looks like
- What's involved in a selection of General Practice roles
- The ways in which practices receive funding
- What General Practice Clinical Systems look like
- How a variety of practice processes match to patient requirements

Core Clinical System training programme

Basic Searches and Reports

Method of Delivery
Pre-booked live training via MS Teams

Duration
2 hours - more than one session may be needed to cover all required content

Who is this training for?
- Clinical and non-clinical members of staff who are tasked with running searches and reports on a regular basis, i.e., to identify patient cohorts, for PCN / ICB data requirements, etc.
- Members of staff who create or amend basic searches and reports

Aim
The aim of this course is to enable users to create and manage searches and reports effectively in EMIS Web

Learning Objectives / Outcomes - at the end of the session learners will be able to:
- Use navigation panes, ribbons, and general housekeeping principles to navigate the Population Reporting module
- Build and organise an appropriate folder structure
- Find existing practice, EMIS and ICB Enterprise (if applicable) searches
- Create and edit a search to a given specification using rules, features, and criteria
- Create a search using multiple rules and changing rule outcomes
- Create a search based on existing search results
- Apply pre-defined EMIS library rules to a practice-built search
- Perform Batch Add, Mail Merge and Print actions to search results
- Use pre-defined reports to display search results

Intermediate Searches and Reports

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

- Members of staff who are required to create more sophisticated searches in EMIS Web, using multiple rules, features, and criteria
- We recommend that you attend the *Basic Searches and Reports* training first, before taking this course

Aim

Following on from *Basic Searches and Reports*, the aim of this course is to use more sophisticated functionality in Population Reporting to create searches and reports in EMIS Web

Learning Objectives / Outcomes - at the end of the session learners will be able to:

- Use library rules in a search
- Limit search results to the latest value or code of a given type
- Set a relative run date, to report on information at a given point in time other than today
- Schedule a search to run automatically
- Build a search based on a count of a specific criterion
- Switch search features from And to Either/Or
- Add columns to a report, to display additional information about the patients
- Give examples of what information can be batch added and specific caveats about using this feature
- Use mail merge to create a bulk mailing to patients found by a search
- Understand the purpose of an aggregate report

Clinical Templates

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours for live training - more than one session may be needed to cover all required content

There is a recorded webinar available on The Learning Hub

Who is this training for?

Clinical and non-clinical members of staff who are responsible for creating and/or modifying clinical templates in EMIS Web

Aim

To enable the user to create and maintain clinical templates effectively in EMIS Web

Learning Objectives / Outcomes - at the end of the session learners will be able to:

- Identify and select the appropriate Ribbon option in Template Manager and Template Builder for any given task
- Describe the folder structure and how to organise it
- Describe the differences between a Page and a Section
- Differentiate the uses of the various Components
- Apply the appropriate Component Item for a given task
- Explain the difference between a manual and automated launch
- Construct a template to a given specification using the appropriate elements
- Evaluate whether the created template has met the specification

Introduction to Protocols and Concepts

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

- Clinical and non-clinical members of staff who wish to understand how protocols and concepts work in EMIS Web and what benefits there are in using them
- Members of staff responsible for creating and maintaining protocols and concepts in EMIS Web

Aim

To enable the user to understand the nature of, create and maintain protocols and concepts in EMIS Web

Learning Objectives / Outcomes

- Create protocols to add a code, add medication, generate a document, launch a template, display a free text message, and display an alert
- Run protocols manually
- Add triggers so protocols run automatically
- Create simple concepts to search on age, sex, clinical codes, or medication
- Use concepts in protocols to generate alerts
- Use concepts to set visibility rules in clinical templates
- Export/import concepts and protocols
- Deactivate/archive protocols and concepts

Appointment Book

Method of Delivery

Pre-booked live training via MS Teams

Duration

1-2 hours

Who is this training for?

Non-clinical and clinical members of staff who book appointments for patients and modify session and slot properties in the Appointment Book

Aim

To enable the user to book and manage the patient appointments effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Select different views of the appointment book using Session Holder Filters.
- Find available appointment slots using different appointment search criteria.
- Book an appointment using appropriate booking reasons, notes, and comments.
- Find existing patient appointments.
- Move and/or cancel an appointment for a patient.
- Update a slot status as appropriate (Arrive, Seen, Cancel, Walk-Out).
- Amend slot properties (update/amend booking notes, block out slot, embargos)

Appointment Book Configuration

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical and clinical members of staff who configure the Appointment Book

Aim

To enable the user to manage Appointment Book configuration effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Add and edit Slot types and Session Categories
- Create and edit Session templates and Week Templates
- Apply week templates to the Appointment Book using the Planner
- Book or cancel organisation closures and staff unavailability
- Manage appointment Organisation Configuration settings (e.g., Session Holder Filters, DNA Management)
- Create ad hoc sessions
- Cancel/Reassign sessions
- View slot and session history
- Build and run appointment reports

Prescribing

Method of Delivery

Pre-booked live training via MS Teams

Duration

1-2 hours

Who is this training for?

- Clinical members of staff who review, prescribe and issue medication to patients
- Non-clinical members of staff involved with reviewing, requesting, and amending patient medications

Aim

To enable the user to manage prescribing effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Add and Edit medication items
- Cancel issue and end medication courses
- Reauthorise medication
- Issue existing medication items using the Add Drug screen and/or Medication tab
- Add, edit, and cancel a Repeat Dispensing regime
- Add messages to the pharmacy/patient, including using Consultation Synonyms
- Electronically request medication
- Identify progress of electronic request i.e., rejected, signed, awaiting GP signature
- Reprint prescriptions in given time frame (including Right Hand Side)
- Toggle between medication views and group medication items alphabetically, by prescription type, problems or EMIS Drug Group
- View drug history
- Manage Organisation Medication configuration

Document Templates

Method of Delivery

Pre-booked live training via MS Teams

Duration

1-2 hours for live training

There is a recorded webinar available on The Learning Hub

Who is this training for?

Non-clinical members of staff (e.g., Medical Secretaries) responsible for creating and maintaining document templates in EMIS Web

Aim

To enable the user to manage document templates effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Build and organise an appropriate folder structure
- Search for an existing Document Template
- Create or edit a document template to a given specification using various Mail Merge fields
- Apply relevant form-filling fields e.g., check boxes
- Test merge a Document Template
- Save a new or edited Document Template
- Change the status (Activate, deactivate, etc.) of a Document Template
- Import or export a Document Template

Registration and Registration Workflow

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours each - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical members of staff responsible for registering patients and monitoring the registration workflow in EMIS Web

Aim

To enable users to manage patient registrations effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

Registration:

- Find a patient using PDS trace
- Register patients using the different registration types e.g., Regular, Temporary
- Edit patient registration details
- Add and edit Relationship links and Patient Carers
- Add local and national sharing consent preferences
- Re-register a patient

Registration Workflow:

- Manage Registration Workflow tasks following the agreed procedures (e.g., Incomplete Registrations, Duplicate Records, Deductions and Amendments)
- Action Close Quarter notifications
- Reallocate GP patient lists

Consultations

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Clinical and non-clinical members of staff who add consultations into the patient's Care Record in EMIS Web

Aim

To enable the user to add and manage patient consultations effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Add, Save and Edit a Consultation using the appropriate elements
- Filter and Search consultation history
- Set and use shortcuts in a consultation (e.g., Quick Picks, Consultation Synonyms)
- Identify appropriate data entry forms and Run Template in a consultation
- Identify appropriate Document Templates in a consultation (e.g., Referral templates, proformas)
- Identify outstanding QOF indicators and action appropriately
- Apply Visibility Rules to a consultation (e.g., change/apply Confidentiality policy and Online Visibility)
- Search and use available external resources e.g., DXS, G-Care, Medicine Management

Patient Record Management

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical and clinical members of staff responsible for keeping patient information up-to-date and accessible in EMIS Web (not including consultations – see above)

Aim

To enable users to manage patient information effectively and ensure that it is accessible in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Find a patient
- Edit patient registration details
- Resolve PDS differences
- Manage patient warnings
- Action outstanding QOF indicators
- Print all or part of a Care Record (e.g., selected items, Print Templates)
- Create, edit, and print patient summaries
- Add and edit coded and free-text data to the Care Record
- Search and/or filter existing coded and free text data
- Manage Problems (e.g., Change the status, Group/Combine/Evolve or link Problems).
- View Tabular and Graphical Trends for Investigations.
- View and manage outstanding Diary entries, test requests and patient tasks
- Launch Data Entry Templates and Document Templates (e.g., letters, forms, clinical templates)
- Manually and automatically launch protocols in a patient record
- Email information in a Care Record
- Attach documents to a patient record (e.g., medical photos)

System Configuration

Method of Delivery

Pre-booked live training via MS Teams

Duration

1-2 hours - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical members of staff (e.g., Practice/Operations Managers, IT/Data Leads) responsible for configuring EMIS Web at an organisational and/or user level

Aim

To enable users to manage system configuration effectively within EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Add a new user; edit existing users applying the appropriate information and access
- Deactivate a user
- Configure Organisation settings (Manage teams, Service Users, Organisation details)
- Use Audit Trails in System Tools to identify activity in patient records and system activity
- Configure Test Request access and third-party products

Patient Online Services

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours

Who is this training for?

Non-clinical members of staff who are responsible for configuring and enabling online patient record access in EMIS Web

Aim

To enable users to manage Patient Online Services effectively in EMIS Web.

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Set and amend appropriate global access levels according to the practice policy (e.g., online appointments, repeat prescriptions and patient record access)
- Enable a patient for Patient Facing Services and reprint the Linkage document
- Set and amend Proxy access (e.g., for parent, guardian, carer, etc.)
- Know how the NHS App interacts with Patient Online Services

System Optimisation

Creating a Flu Protocol

Method of Delivery
Pre-booked bespoke training, via MS Teams / video

Duration
- Approximately 1 hour for bespoke training
- 45 mins video available on The Learning Hub

Who is this training for?
This training is designed for clinical and non-clinical staff who are involved with recording flu vaccinations on EMIS Web

Aim
To walk learners through the process of creating a simple Flu Protocol

Learning Objectives / Outcomes – learning objectives and outcomes for this bespoke training should include, but are not limited to, the learner being able to:
- Locate the Template manager/Resource Publisher in EMIS Web
- Differentiate between action and decision nodes
- Create and save a basic flu protocol
- Add a protocol to the protocol launcher (F12 key) and run protocol
- Edit protocol to include additional nodes

Task Management in Workflow Manager

Method of Delivery

Pre-booked bespoke training, via MS Teams / video

Duration

- 1-2 hours for live webinar training
- 45 mins video available on The Learning Hub

Who is this training for?

Clinical and non-clinical staff who manage and action tasks within Workflow Manager as part of their role

Aim

To manage and action tasks within Workflow Manager effectively through EMIS Web

Learning Objectives / Outcomes – learning objectives and outcomes for this bespoke training should include, but are not limited to, the learner being able to:

- Add and send a task.
- Manage, complete and archive tasks.
- Change ownership of a task.
- Configure Workflow User Option settings (e.g., select/deselect Task Counts, set up Custom Folders, and update Out of Office settings).
- Configure Workflow Organisation settings (e.g., set Global Viewers, activate/inactivate Task Types, manage Task Escalation settings)
- Monitor outstanding Workflow Manager tasks (e.g., Medicine Management, Lab Reports, Test Requests)
- Add Note to maintain tasks.
- Switch between Workflow Views (e.g., your tasks only, My Tasks + Deputising for, Global Tasks).

Using Clinical Views in the Care Record

Method of Delivery

Pre-booked bespoke training, via MS Teams / video

Duration

- 1 hour for live webinar training
- 45 mins video available on The Learning Hub

Who is this training for?

Clinical and non-clinical staff who would like to optimise the effectiveness with which they view clinical information in the Summary tab of the patient's Care Record.

Aim

To configure and use Clinical Views in the patient Care Record Summary, at a personal and organisational level

Learning Objectives / Outcomes – learning objectives and outcomes for this bespoke training should include, but are not limited to, the learner being able to:

- Access the Care Record configuration and view existing Clinical Views
- Create and save a basic Clinical View using the New Clinical View dialog
- Activate, Deactivate and Archive Clinical Views
- View Available Clinical Views and Select for personal use
- Mark a Clinical View as Default

Managing Diary Entries

Method of Delivery
Pre-booked bespoke training, via MS Teams / video

Duration
- 1 hour for live webinar training
- 30 mins video available on The Learning Hub

Who is this training for?
Non-clinical staff tasked with setting up and monitoring diary events for patients

Aim
To create and monitor Diary entries for individuals and to optimise the application of Diary entries across the entire practice population

Learning Objectives / Outcomes – learning objectives and outcomes for this bespoke training should include, but are not limited to, the learner being able to:
- Understand the different types of Diary entry
- Recognise and use appropriate Diary Ribbon Options
- Add a Diary entry via the Patient Record
- Add a Diary entry via a Protocol
- Action and edit several types of diary entry
- View and filter completed diary items
- Search on Diary entries

Consultations: Hints & Tips

Method of Delivery

Pre-booked bespoke training, via MS Teams / video

Duration

- 1 hour for live webinar training
- 45 mins video available on The Learning Hub

Who is this training for?

Clinical staff who use consultations to record patient information

Aim

To optimise and enhance the use of consultations

Learning Objectives / Outcomes – learning objectives and outcomes for this bespoke training should include, but are not limited to, the learner being able to:

- Configure and use Consultation Styles to enhance data entry in consultations
- Use and configure synonyms for individual and organizational use in consultations
- Configure and use Quick Picks ('zap key,' lightning bolt) to data in consultations
- Configure and use templates to enhance data entry in consultations

Data Quality training programme

Introduction to Medical Terminology Part 1 – Bodies, Bones and Basic Terms

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours or by agreement; may require more than one session

Who is this training for?

Non-clinical members of staff, including new starters, reception, administrators, and notes summarisers who need to understand the terminology used in medical records

Aim

To provide an introduction to medical terminology, including bodies, bones, and basic terms.

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Identify the main organs of the human body
- Recognise abbreviations and acronyms and describe their dangers when misused or misunderstood
- Recognise common terms used in the language of healthcare in general practice
- Identify the main bones in the human body

Introduction to Medical Terminology Part 2 – Decoding the Doctor's Dictionary

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours or by agreement; may require more than one session

Who is this training for?

Non-clinical members of staff, including new starters, reception, administrators, and notes summarisers who need to understand the terminology used in medical records

Aim

To provide an introduction to Medical Terminology and help 'decode' some of the terminology commonly used by clinicians in a patient's record.

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Define what we mean by 'medical terminology'
- Look at the different ways medical terms are expressed
- Break down medical words into their component parts
- Translate medical terms into everyday language
- Use techniques to remember what each of these word parts mean

Introduction to Clinical Coding

Method of Delivery
Pre-booked live training via MS Teams

Duration
2 hours - more than one session may be needed to cover all required content

Who is this training for?
Non-clinical members of staff, who will be viewing and using clinical coding in their day-to-day work

Aim
To familiarise learners with using and interpreting clinical coding and data quality in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Understand the principles of clinical coding in EMIS Web
- Develop knowledge of what coded information is used for after being entered into EMIS Web
- Be able to use the course information to adhere to data quality guidelines
- Practice clinical coding searching methods using the EMIS Web SNOMED CT code browser
- Understand the coding structure including hierarchy, preferred terms, and relationships
- Have knowledge of external resources and how they can further develop understanding of coding and data quality

Introduction to Notes Summarising

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

- Non-clinical members of staff, responsible for summarising patient records within the practice
- Please note that this is an introductory course. It may be useful for users to complete the *Medical Terminology* and *Clinical Coding* courses before taking the Notes Summarising training

Aim

To familiarise learners with the principles of notes summarising in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Identify the reasons for summarising, and the need for accuracy in coding data
- Apply the criteria for selecting information to summarise
- Record information accurately in a medical record, as part of the summarising process
- Handle sensitive and personal information appropriately
- Adhere to the legislation relevant to medical records

National and Spine Applications training programme

Managing eRS Worklists

Method of Delivery

Pre-booked live training via MS Teams

Duration

- 1-2 hours for live webinar training
- 45 mins video available on The Learning Hub

Who is this training for?

Non-clinical staff who are involved in managing Worklists on the eRS Portal

Aim

To provide clear and unambiguous guidance to the latest advice, guidance, and developments regarding the management of Worklists in the eRS Portal

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Manage Rejected/Triage response, Letter outstanding, Incomplete, Advice and guidance, Assessment returned/Cancelled/DNA, Awaiting booking
- Troubleshoot, i.e., Editing/Amending/Expediting e-Referrals
- Manage Referral Assessment Service (RAS) e-Referrals
- Check Status of a 2 week wait referral

GP2GP Record Transfer

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical staff who process and manage GP2GP transactions as part of their role

Aim To manage GP2GP transactions effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- File incoming electronic records for new patients.
- File incoming electronic records for returning patients.
- Action degraded and medication items.
- Check for potential transmission errors and deal with them accordingly.
- Manage Requests and Records Sent GP2GP tasks within the Workflow Manager (e.g., Rejections, Integration Failure)

Electronic Prescribing Service (EPS)

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Clinical and non-clinical staff who request, issue, or sign electronic prescriptions as part of their role

Aim

To manage EPS effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Add, amend, and remove patient Pharmacy and Appliance Contractor nominations.
- Add and issue electronic prescriptions.
- Convert an EPS request to paper.
- Reprint an eToken.
- Manage EPS script cancellations.
- Manage the EPS signing tasks (e.g., approve items, reject items).
- Use the electronic Prescription Tracker and clinical system to identify the status of a script.

Electronic Referral Service (eRS)

Method of Delivery

Pre-booked live training via MS Teams

Duration

2 hours - more than one session may be needed to cover all required content

Who is this training for?

Non-clinical staff who create and monitor e-Referrals as part of their role

Aim

To manage eRS effectively in EMIS Web

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Book and request appointments via the e-referral portal following your Practice processes
- Attach document(s) and/or clinical data via the Clinical System to an e-Referral.
- Cancel e-Referrals following the correct procedures.
- Create, complete, and cancel Advice and Guidance request.
- Monitor and process Advice and Guidance response.
- Electronically send referrals for internal authorisation

Introduction to the NHS App

Method of Delivery

Live webinar via MS Teams

Duration

30 minutes

Who is this course for?

Anyone who is responsible for online services at GP practices, as part of their job role

Aim

To give an overview of the NHS App, as a simple and secure way to access a range of NHS services on your smartphone or web browser

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Appreciate what the NHS App offers to patients
- Know how the NHS App benefits patients and the practice
- Understand how to access the App
- Know how to make Every contact count when promoting the App
- Have an awareness of the Secure Messaging Service (SMS) the App offers

N365

Below is a list of the Apps that the IT training team currently supports, but as your organisation moves into the next phase of its development with N365, more will come on board for use, and our team will endeavour to provide end user training and support for these, where this has been agreed.

N365 Apps – live webinars

Method of Delivery
Live webinar via MS Teams – please visit The Learning Hub for details

Duration
1 hour (except Forms, which takes approximately 1 ½ hours)

Who are these for?
Anyone new to using N365 Apps

Aim
Delivered via MS Teams, these webinars are an introduction to the new N365 Apps. These are bookable from the Learning Hub, where you can select the required topic to see further information on what is covered in the webinar and book your place if required. A recorded version of each of these webinars is available on The Learning Hub.

- **Forms** – create surveys and quizzes, collect, and analyse responses and present the data effectively
- **Planner** – create and manage tasks to share with colleagues, update progress and monitor work packages
- **To Do** – your own personal planner! Integrates with Teams
- **Whiteboard** – brainstorm and collaborate creatively on Teams meetings, or in a shared space, with this flexible drawing/annotation tool
- **Lists** – Add flexibility and dynamism to your text records, a great alternative to Excel if you want to create a database without the need for calculations
- **Sway** – Be creative and add fluidity to information you wish to share with colleagues, with this ‘online’ presentational aid
- **Delve** – keep tabs on, prioritise, and manage files and folders you access regularly, across all Apps, in one space
- **OneNote** – your digital notebook, replaces paper and links in directly with Outlook and many of your other N365 Apps

MS Teams – Back to Basics

Method of Delivery

Live webinar via MS Teams – please visit The Learning Hub for details

Duration

1 hour

Who is this course for?

Anyone who wishes to use MS Teams to communicate effectively with colleagues within their own organisation, the wider NHS, and other external organisations

Aim

To give users a basic introduction in using Microsoft Teams for the purpose of communicating with NHS colleagues in their own and other NHS organisations

Learning Objectives / Outcomes – content is flexible, but at the end of the session learners will have looked at content that can include, but is not limited to:

- Login to MS Teams correctly and confirm they have used correct login details
- Understand the benefits of logging in correctly
- Use Profile Status to indicate availability
- Locate, understand, and use Settings and other functionality from their Profile
- Understand the difference between Teams and Channels
- Understand the difference between using Chat and Channel reply Posts
- Attend a Teams meeting and use functionality appropriately, including:
    - Sound and cameras
    - Sharing screens
    - New functionality

MS Teams - Meetings

Method of Delivery
Recording of webinar available on our website
Live webinar via MS Teams

Duration
1 hour

Who is this course for?
Anyone who wishes to use MS Teams to conduct meetings

Aim
To give users an introduction in using Microsoft Teams for organising, scheduling, running, and attending Live webinar via MS Teams meeting with NHS and non-NHS colleagues

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Initiate an Ad hoc meeting in MS Teams
- Schedule and invite colleagues to an MS Teams meeting using an invitation from Outlook
- Understand the differences in meeting size (number of attendees) between Ad hoc, Outlook and Live Event meeting formats
- Understand the options available for bypassing the lobby when entering a Teams meeting
- Be familiar with and use functionality within a Teams meeting, e.g., mute, video, live captions, screen sharing, etc. to their best advantage

MS Teams - Collaborative Working

Method of Delivery

Recording of webinar available on our website

Live webinar via MS Teams

Duration

1 hour

Who is this course for?

Anyone who wishes to invite colleagues from organisations outside of the NHS to attend meetings and access other content in MS Teams

Aim

To give an overview of the collaborative options available for NHS and non-NHS staff in MS Teams

Learning Objectives / Outcomes – at the end of the session learners will be able to:

- Understand the nature of guests and their access to the NHS Teams
- Invite Guests to a meeting via Outlook!
- Understand Guest process for Chat, Teams, and Channels
- Be familiar with the functionality regarding document sharing in Teams

IT Skills Pathway

IT Skills Pathway is a free NHS on-line learning resource available to all NHS staff. Courses include:

- Windows
- Excel
- Word
- PowerPoint
- Outlook
- OneNote

The GP IT Training and Support Admin team at SCW provide an administrative function for the IT Skills Pathway. We can guide you to the course details and provide login details. For more information, please visit https://www.e-lfh.org.uk/programmes/it-skills-pathway/. The IT Skills Pathway also includes a knowledge base for Microsoft Office and Windows queries.

Microsoft Office one-off Webinars via MS Teams

If you would prefer one-to-one Microsoft Office training delivery, we can offer bespoke live webinar training on the following software:

- **Windows 10**:
  - Basic navigation and configuration, settings for display, sound, and interaction (Ease of Access), hints, tips, and shortcuts
- **Excel**:
  - Introduction – basic navigation, adding and editing data, formatting, basic formula
  - Intermediate – navigation hints and tips, filtering and sorting, pivot tables and charts
  - Advanced – logical and statistical functions, validation, conditional formatting
- **Word**:
  - Introduction – Adding and formatting text, printing, bulleted/numbered lists, reviewing
  - Intermediate – creating and editing tables, inserting graphics/pictures, mail-merge
- **Outlook**:
  - Basic email and inbox management, creating a signature, setting and Out of Office reply
  - Calendar views and sharing, creating calendar appointments / Teams meetings in Outlook
- **PowerPoint**:
  - Creating a slideshow, adding content, transition and animation effects, hints, and tips for presenting a slideshow, printing of slides for resources

Please note that this training is subject to availability - for more details, or if you would like to speak to us about the IT Skills Pathway, please contact our Admin Team training.scwcsu@nhs.net