South, Central and West Commissioning Support Unit

IT Training and Support Prospectus

SCW Digital, Data and Technology

TPP SystmOne 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)

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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

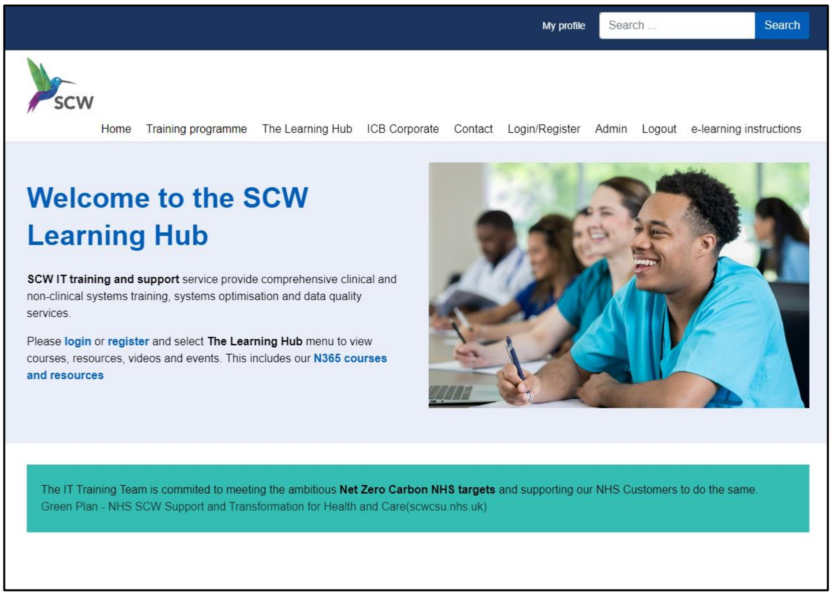
The IT training programme for 2023/24 is provided by your ICB in support of clinical system optimisation, and there is no charge to your GP practice or PCN. Analysis of data from previous years, as well the demands of ever-increasing digitisation within healthcare, have informed us that training at GP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

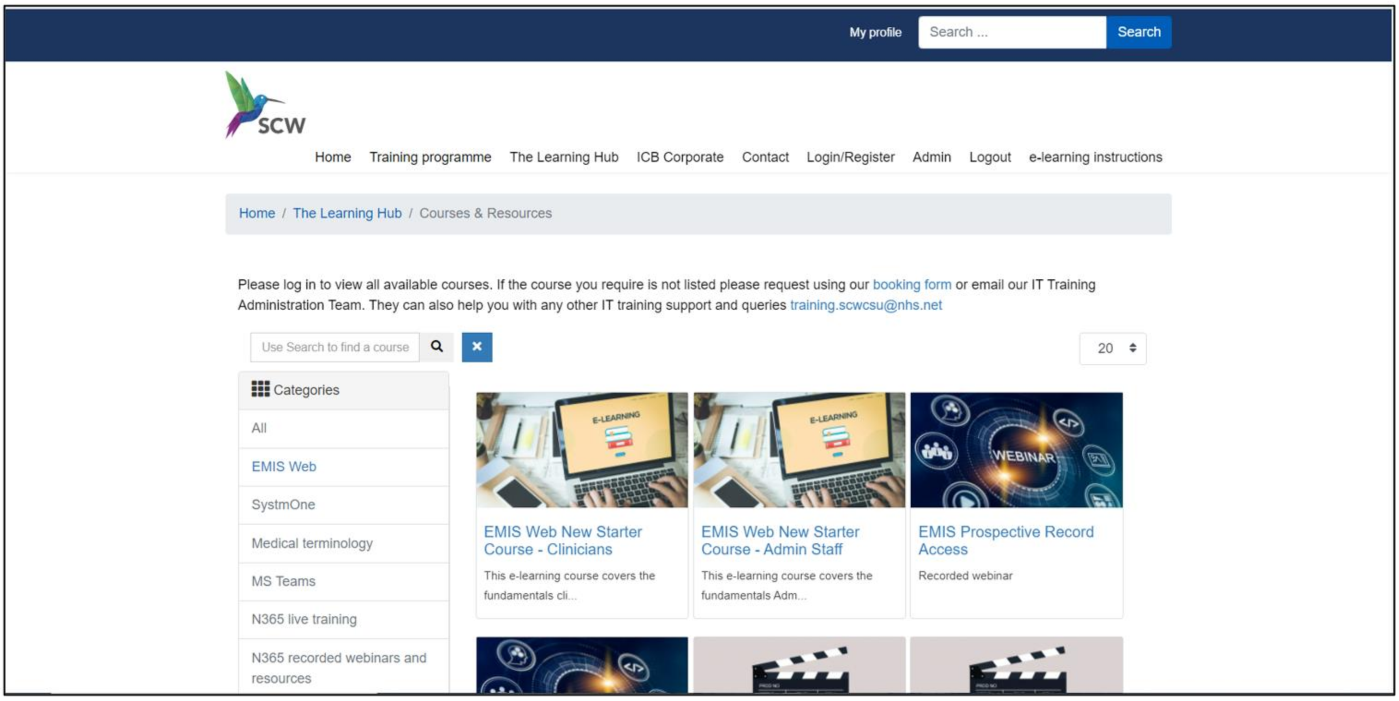
We now offer e-Learning for a variety of topics, via our Learning Management System (LMS) on The Learning Hub, alongside our live training. Just login to The Learning Hub and you're ready to go!

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., Tasks 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.

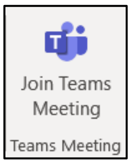
Getting ready for your Online Training Session

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 programme

New Starter training for Receptionists

Method of Delivery
Live webinar via MS Teams (MS Teams)

Duration
2 ½ hours or by agreement; may require more than one session

Who is this course for?
This course is designed for New Receptionists who have little experience of SystmOne. During this course New Receptionists will not be provided with information on local GP Practice processes so before booking you should ensure that they have received a local induction.

Aim
The aim of this course is to introduce new users to SystmOne functionality, pertinent to their role within the practice

Learning Objectives / Outcomes – during this course you will learn how to:

- Navigate the Home Screen
- Search for Patient Records
- Search for a patient using alternative methods including Patient Locator
- Edit patient demographic details
- Resolve PDS mismatches
- Book, cancel and move an appointment
- Use the Free Slot Search function
- Navigate the clinical and administrative trees
- Print a Quick Glance View
- Access Pathology results
- Administer Repeat Template medication requests (if appropriate)
- View Prescription History
- Update Addresses and contact details
- Send tasks, notifications, and instant messages

**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 non-clinical staff

Method of Delivery

Live webinar via MS Teams

Duration

2 ½ hours or by agreement; may require more than one session

Who is this course for?

Anyone who is new to SystmOne and in an administrative function

Aim

The aim of this course is to introduce new users to SystmOne functionality, pertinent to their role within the practice

Learning Objectives / Outcomes – these will depend on the user's role within the practice, and could include, *but are not limited to*:

- Navigate and configure the home screen
- Perform a patient search
- Navigate the patient record
- Search for a patient using alternative methods including Patient Locator
- Edit patient demographic details
- Resolve PDS mismatches
- Enter and edit a consultation
- Record Problems, manage QOF alerts, Smoking status, Drinking status, numeric values, BPs
- Use prescribing functionality for Acute, Repeats and Repeat Dispensing
- Read and file scanned documents
- Send and reply to a notification
- Sending, reading, replying, and managing tasklists
- Navigate the Appointment Ledger, using Bookmarks
- Booking telephone/follow up appointments/home visits
- Create and edit letters

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

<u>first week to a fortnight</u> of your new member of staff being in post

New Starter training for clinical staff

Method of Delivery

Live webinar via MS Teams

Duration

2 ½ hours or by agreement; may require more than one session

Who is this course for?

Anyone who is new to SystmOne in a clinical function

Aim

The aim of this course is to introduce new users to SystmOne functionality, pertinent to their role within the practice

Learning Objectives / Outcomes – these will depend on the user's role within the practice, and could include, *but are not limited to*:

- Navigate and configure the home screen
- Perform a patient search
- Navigate the patient record
- Resolve PDS mismatches
- Enter and edit a consultation
- Use clinical data entry templates
- Manage recalls
- Record Problems, manage QOF alerts, add read codes
- Use prescribing functionality for Acute, Repeats and Repeat Dispensing
- Read and file scanned documents
- Read and file pathology results
- Create and edit letters (eReferrals training upon request)
- Send and reply to a notification
- Sending, reading, replying, and managing tasklists
- Navigate the Appointment Ledger, using Bookmarks

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

Method of Delivery

Live webinar via MS Teams

Duration

Up to 1 ½ hours

Who is this course for?

Anyone working alongside or supporting General Practices

Aim

To increase the learner's 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 looks like
- How a variety of practice processes match to patient requirements

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

Core Clinical System Programme

Patient Record Management - additional items

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
Anyone who accesses the Patient Record as part of their job role and wants to improve their knowledge of SystmOne. The items below can be added to other training courses. Please speak to the IT Training Administration team on 0300 123 5678 or email training.scwcsu@nhs.net to discuss your requirements.

Aim
To manage the Patient Record effectively in SystmOne

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

- Problem & Summary management
- Add, amend and view Read Codes in a patient record
- Use Read Code formularies and Synonyms
- Manage and record Special Notes in a patient record
- Create and view patient Reminders
- Manage patient recall status e.g., Seen, Supersede
- Create, view, and print Quick Glance Views
- Record Allergy and Drug Sensitivities
- Add vaccination history using the Next button
- Record Cervical Screening and Results
- Create Numeric Result pre-set
- Create and save a letter in a patient record
- View Tabular and Graphical trends for Pathology results
- Action outstanding QOF indicators in a patient record
- Add an attachment to the patient record
- Add, use, and copy pre-set Notes
- Send communications and letters via NHS Email
- View, update and add additional items to the patient Summary Care Record

Clinical Reporting

Method of Delivery
Live webinar via MS Teams

Duration
Up to 2 ½ hours or by agreement; may require more than one session

Who is this course for?
Anyone who is new to creating, amending, or running searches and reports in SystmOne as part of their work

Aim
The aim of this course is for the user to develop skills in interrogating and searching the clinical system for reporting purposes

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

- Navigate the reporting functionality in SystmOne – Built in/Target Reports and Clinical reporting
- Understand the Clinical Reporting Tree in order to View existing reports – View existing reports in the Clinical Reporting Tree
- Create a new report and apply search criteria.
- Join simple reports together to make more complex reports
- Run reports and view their results
- Amend search criteria
- Copy existing report
- Import and export a report
- Create Batch reports
- Explain how to use a report in a Protocol/Patient Status Alert
- Create an Ad Hoc Patient List

Clinical Templates

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
Anyone who has to create and amend clinical templates as part of their work

Aim
To create and manage clinical templates effectively through TPP SystmOne

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

- Identify how to access the template functionality (New template maintenance screen)
- Locate system wide, ICB group and organisation templates
- Import and export existing templates
- Demonstrate how to create a new template and design the page layout
- Determine the best options for applying numeric, coded, and other data field items to a page
- Identify how to Save and Publish the template
- Illustrate how to amend an existing template
- Copy templates and recognise the benefits and dis-benefits of copying
- Decide how to utilise templates using the variety of methods available (Auto consultation, Patient status alert, protocols etc.)
- Discuss Clinical tree and toolbar configuration to standardise the use of templates
- Demonstrate how to record information using a template in a patient record

Protocols

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
Anyone who is required to create, edit, and manage protocols as part of their work

Aim
To demonstrate skills in designing and applying Protocols using a range of SystmOne tools

Learning Objectives / Outcomes

- Define the purpose and benefits of a protocol
- Navigate the System Wide protocol resources already available
- Design, publish and apply a new protocol
- Apply manual and automatic protocol triggers
- Review and edit protocols
- Implement housekeeping techniques to manage and maintain your practice protocols

Registrations

Method of Delivery
Live webinar via MS Teams; telephone support

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

Who is this course for?
Anyone who manages patient registration as part of their job role. This course is often combined with either GP2GP or EDI Links training.

Aim:
To manage patient registration effectively in SystmOne

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

- Find a patient using PDS trace.
- Register a patient using different registration types e.g., Permanent, Temporary.
- Amend patient registration details.
- Re-register a patient.
- Add/edit family relationships and carers link.
- Deduct patients.
- Deduct and re-register out of area patients.
- Add local and national sharing consent preferences.

EDI Links

Method of Delivery
Live webinar via MS Teams; telephone support

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

Who is this course for?
Anyone who manages Electronic Data Interchange as part of their job role. Consider including registration training/refresher when booking this training course.

Aim:
To gain knowledge and skills on how Electronic Data Interchange is used to transfer patient data securely between SystmOne and Health Authority systems, using EDI Links and New Links

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

- Customise the EDI Links Screen and explain screen layout
- Describe the correct processing order for EDI administration
- Describe the purpose of each EDI Administration tab
- Understanding Message Colour Coding
- Process Message Types
- Troubleshoot problems with EDI Links
- Process FP69 Messages
- Use the Filter Options
- Search for EDI Messages
- Process Medical Records In/Out
- Implement Security Controlled Procedures
- Produce Quarterly Certificates
- Apply skills using New Links (New and Improved functionality)
- Review EDI scenarios and process examples

Letter Templates

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
Anyone who creates and amends Letter Templates as part of their job role

Aim
To show the functionality of Integrated Word and it's merged fields in SystmOne

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

- Define what Integrated Word in SystmOne does
- Apply the different merge field sources within Integrated Word
- Identify the different Toolbar Options
- Recognise how to configure the Merge Fields
- Identify how to create Letter Templates from Scratch and also importing an already created letter
- Show how to access a Letter Template to Create a Letter in Communications & Letters

Appointment Ledger

Method of Delivery

Live webinar via MS Teams; telephone support

Duration:

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

Who is this course for?

Anyone who uses the Appointment Ledger as part of their job role

Aim:

To provide an overview of Appointment Booking in SystmOne

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

- Navigate the Appointment Ledger & Overview screen
- Set Appointment View Bookmarks
- Book Appointments
- Move, cancel & re-book appointments
- Search Free Slot appointments
- Recognise Slot Types e.g., routine, telephone clinics
- Insert, Merge appointments and Extend clinics
- Appointment search (patient specific)

Appointment Rota Configuration

Method of Delivery
Live webinar via MS Teams; telephone support

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

Who is this course for?
Anyone who configures the Appointment Book as part of their job role

Aim
The aim of this course is to enable the user to design a Rota Template and apply it to the Appointments Book in SystmOne

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

- Enter & Amend Closed Days
- Enter & Amend Staff Leave
- Create a Room
- Create new Slot types
- Create Rota Types
- Create, amend & apply a Rota Template
- View Applied Rotas
- Create a one-off Rota
- Turn a one-off Rota in to a Rota Template
- Move a Rota to a Different Time/Different Clinician
- Cancel Individual & Multiple Rotas & restore a Cancelled Rota
- Delete a Rota
- Extend a Rota
- Create Appointment Templates
- Configure Free Slot Search for Receptionists

Appointment Invitation URLs

Method of Delivery

Live webinar via MS Teams; telephone support

Duration:

Up to 2 hours or by agreement

Who is this course for?

Anyone who configures the Appointment Ledger or books appointments as part of their job role

Aim:

To provide an overview of Appointment Invitation URLs in SystmOne

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

- Setup an Organisation Group
- Create Appointment Invitation types
- Allocate Appointment Invitation types to a rota or slot type
- Send an Appointment Invitation URL to a patient
- Send an Appointment Invitation URL to a list of patients
- Run a report on appointment invitations sent

Appointment Utilisation Tool

Method of Delivery
Live webinar via MS Teams; telephone support

Duration:
Up to 1.5 hours or by agreement

Who is this course for?
Anyone who configures the Appointment Ledger and needs to monitor slot type utilisation as part of their job role

Aim:
To provide an overview of Appointment Utilisation in SystmOne

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

- Finding the Appointment Utilisation dashboard
- Filtering the dashboard by slot type
- View appointments by Date Range
- View appointments booked by Age/Gender
- View multiple appointments, DNAs, and cancellations
- View Local and National slot type utilisation

Prescribing

Method of Delivery
Live webinar via MS Teams; telephone support

Duration:
Up to 2 hours or by agreement; may require more than one session

Who is this course for?
Anyone who prescribes or issues medication as part of their job role

Aim:
To manage prescribing effectively through SystmOne

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

- Add, amend and issue Acute and Repeat Medication prescriptions
- Issue, edit and cancel Repeat Dispensing regime
- Process future dated prescription issues
- View Medication history, Issue history and a summary of all medication
- Convert an Acute prescription into a Repeat prescription
- Cancel or End a single issue or whole repeat prescription
- Record a medication review
- Access detailed drug information e.g., equivalents, side effects
- Create or action a prescription request task for a patient
- Print a list of current repeat medication
- Create a drug formulary entry
- Use the electronic Prescription Tracker and clinical system to identify the status of a script

Consultations

Method of Delivery
Live webinar via MS Teams; Video/YouTube

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

Who is this course for?
Anyone who creates and edits consultations as part of their job role

Aim
To provide an overview of the Consultation functionality and clinical tools

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

- Start a new Consultation
- Recording two or more problems in a single consultation – New Section
- Adding read codes
- Entering numeric read code values
- Merging complaints
- Creating and entering data using an Auto-consultation
- Recording a medical drawing
- Adding information to the patient summary
- Event details
- Recording Problems
- Linking medication to a problem
- Merging problems
- Using Templates for consistent data entry (e.g., Smoking status, hypertension, new patient health check
- Recording numeric values, BPs
- Tabbed Journal, filter, search, mark in error, edit entries (change date)
- Read code journal
- Printing prescriptions, summaries. letters and consultations
- QOF overview (Timeline, alerts & analysis)

Dispensing

Method of Delivery
Live webinar via MS Teams, telephone support

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

Who is this course for?
Anyone who manages dispensing or dispenses medication at surgeries as part of their job role

Aim
The aim of the session is to enable users to use the Dispensing functionality within SystmOne

Learning Objectives / Outcomes – during this course you will learn how to:

- Enable the dispensing functionality and set preferences for dispensing
- Configure the home screen and specify dispensing settings for users
- Search for Dispensing Jobs
- Dispense Items
- Use Stock Control
- Order Stock
- Record receipt of Stock
- Work with Batch Numbers
- Manage Expiring Stock
- View Stock History Details
- Manage Doctors' Bags and Record Stock Movement
- Print Labels
- Run Dispensing Reports
- Use Audit Trail Reports

Scanning and Document Management

Method of Delivery
Live webinar via MS Teams; telephone support

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

Who is this course for?
Anyone who scans and files documents and/or codes patient documents in SystmOne

Aim
The aim of the session is to enable users to Scan and Code patient documents and workflow them efficiently

Learning Objectives / Outcomes – during this course you will learn how to:

- Scan documents into SystmOne
- Process scanned documents
- Merge multiple page documents
- Manage batches of scanned documents
- Code scanned documents
- Save the documents to a Patient Record
- Forward a document on to a GP or Coder to view/code
- Delete document updates
- Create Scanning Rules

System Configuration

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
Anyone who configures SystmOne as part of their job role

Aim
To manage system configuration effectively within TPP SystmOne

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

- Add a new user; edit existing users, archive a user
- Configure Organisation Preferences
- Configure User Preferences
- Use Audit functionality to identify activity in patient records and system activity

Online Services

Method of Delivery
Live webinar via MS Teams; telephone support

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

Who is this course for?
Anyone who configures and enables patient record access as part of their job role

Aim
To manage Patient Online Services effectively through SystmOne

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

- Configure Online Services
- Register a patient for Online Services
- Generate new username, password and reprint the Online credentials document
- Register a patient for Proxy access to carer or child record
- Monitor Online Services tasks
- Register new online service user

Communications Annexe

Method of Delivery

Live webinar via MS Teams; telephone support

Duration:

Up to 2 hours or by agreement

Who is this course for?

Anyone who sends SMS, Email or Airmid messages to patients as part of their job role

Aim:

To provide an overview of Communications Annexe in SystmOne

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

- Add Communications Annexe button to toolbar
- Record patient preferred contact method
- Create and send a message
- Configure and use Pre-set messages
- Use the tool for a list of patients (clinical report/ad hoc list)
- Manage patient replies
- Digitally sign and send a Med3
- Send a patient questionnaire

Visualisations

Method of Delivery

Live webinar via MS Teams; telephone support

Duration:

Up to 2 hours or by agreement (may require a further session)

Who is this course for?

Anyone who configures Views, Protocols, Clinical template tools as part of their job role

Aim:

To provide an overview of Visualisations in SystmOne

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

- Enable Visualisations in SystmOne
- Create a visualisation
- Use column, manual and border layout options
- Use Palette components
- Configure components
- Add background colour
- Hide component if patient is not in a report
- Cut, copy and paste using palette
- Add a quick action
- Add aggregate graph
- Add data entry template, questionnaire, numeric results graph
- Add image, add data into patient record
- Publish a visualisation
- Display visualisation using clinical tree, toolbar, quick action, pop out node
- Use Dashboards and Visualisations - Public dashboard – patient call settings
- Visualisations Overview

System Optimisation Programme

The following section covers the training SCW provides for System Optimisation in TPP SystmOne, specifically in the training programmes and schedule funded by your ICB.

For more information about what courses are available in your area, and to make a booking, please visit our website http://training.scwcsu.nhs.uk/, or contact our IT Administration Team on **0300 123 5678**, or email training.scwcsu@nhs.net

SystmOne Housekeeping

Housekeeping Workshop (duration 2 hours or by flexible agreement).

This workshop is designed for GP Practices who want to ensure they're fully maintaining the system functionality. During this session we'll provide guidance on how to maintain SystmOne and ensure that Patient Registration and Staff & Organisation setup is accurate and up to date. Below is a sample of the areas we can cover with you at your practice.

For further details or to book a place please contact the IT Training Administration Team on 0300 123 5678 or email training.scwcsu@nhs.net

- *No NHS Number Search* — Find patients with no NHS Number, create registration types search and resolve registration issues
- *Resources* — Tidy up organisation created resources e.g., clinical/document templates, protocols, clinical reports etc, deactivate unused templates, disable duplicate alerts if using Ardens
- *Trees* — Tidy up clinical and administrative trees
- *Toolbars* — Tidy up toolbars and create role specific toolbars
- *Residential Institute Codes* — Ensure practice have clearly defined codes for Nursing and Residential Care Homes
- *Users & Organisation setup* — Archive users, setup new users, troubleshoot user access queries
- *Task Workflow* — Tidy up tasks, resolve unassigned task issues, configure task types, set up task rules
- *SCR updates* — Tidy up SCR updates, resolve SCRs not sent issues
- *Configured lists* — Create new letter type and appointment booking list options

Optimising SystmOne Functionality

SystmOne System Optimisation (duration 2 hours or by flexible agreement).

This workshop is designed for GP Practices who want to ensure they're fully optimising the system functionality. During this session we'll provide hints and tips and suggest ways of getting more from your clinical system - below is a sample of the areas we can cover with you at your practice.

Please download the form from our website and select the topics you're interested in - this form can be emailed to the IT Training Administration Team when booking a session training.scwcsu@nhs.net

SystmOne System Optimisation Booking Form

We also have a number of system optimisation Recorded Webinars and Crib sheets that can be accessed **here**

For further details or to book a place please contact the IT Training Administration Team on 0300 123 5678 or email training.scwcsu@nhs.net

• *Address Book*	Populating address book, using and sharing the Address Book
• *Appointment Templates*	Automate appointment duration, details, and pop-up messages
• *Free slot search configuration*	Setup to make finding free appointments easier
• *Restrict appointment viewing*	Restrict specific staff viewing full appointment ledger
• *Appointment ledger configuration*	Setup organisation bookmarks, staff leave, appointment URL’s
• *Website Bookmark set up*	Setup favourite URL bookmarks and add to the toolbar
• *Dosage Shortcuts*	Create medical dosage shortcuts
• *Numeric Results Pre-sets*	Create Numeric Results pre-sets to view multiple results
• *Tabbed Journal Tabs and Filters*	Create organisational tabs to make viewing Journal easier
• *Read Code Formulary/Synonyms*	Add codes to a Read Code Formulary and create synonyms

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 training

Method of Delivery
Live webinar via MS Teams

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

Who is this course for?
This course is an introductory course aimed at non-clinical staff, who will be viewing and using clinical coding in their day-to-day work

Aim
To familiarise learners with clinical coding, SNOMED CT, and data quality in TPP SystmOne

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

- Understand the principles of coding in TPP SystmOne
- Develop knowledge of what coded information is used for after being entered into TPP SystmOne
- Be able to use the course information to adhere to data quality guidelines
- Practice both CTV3 and SNOMED CT searching methods using the TPP SystmOne code browsers
- Understand the coding structure including hierarchy
- Put clinical coding skills into practice in SystmOne using a range of examples

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 TPP SystmOne

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
- Put note summarising skills into practice in SystmOne using a range of examples

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

Live webinar via MS Teams; telephone support

Duration

Up to 2 ½ hours or by agreement; may take more than one session

Who is this course for?

Anyone who processes and manages GP2GP transactions as part of their job role. This training course can be combined with New Registration and EDI Links training if appropriate. Please contact the IT Training Administration team to discuss your requirements.

Aim

To introduce GP2GP and equip learners with the skills to Action GP2GP Tasks, integrate records and manage degraded entries

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

- Understand what triggers GP2GP within Registration
- Understand the different Transfer Types [Transfer in, Transfer out]
- Identify and action GP2GP Transfer Tasks
- Perform a GP2GP Transfer and Integrate patient record
- Cancel a GP2GP transfer
- Identify deduction ended repeats for re-authorisation by appropriate member of staff
- Identify and deal with degraded entries as appropriate to job role
- Understand GP2GP Transfer in screen
- Understand GP2GP Transfer out screen including flags
- Understand how to print a partial record from a GP2GP Transfer Out Task

Electronic Prescribing Service (EPS)

Method of Delivery

Live webinar via MS Teams; telephone support

Duration

Up to 2 ½ hours or by agreement; may take more than one session

Who is this course for?

Anyone who requests, issues or signs electronic prescriptions as part of their job role

Aim

To manage EPS effectively in TPP SystmOne

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 a Token
- Manage EPS script cancellations
- Manage the EPS signing tasks
- Use the electronic Prescription Tracker and clinical system to identify the status of a script

Electronic Referral Service (eRS)

Method of Delivery
Live webinar via MS Teams; telephone support

Duration
Up to 2 ½ hours or by agreement; may take more than one session

Who is this course for?
Anyone who creates and amends e-referrals as part of their job role

Aim
To manage eRS effectively in TPP SystmOne

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.
- Manage the e-referral worklists.
- Action outstanding tasks for the Referral Management.
- Electronically send referrals
- Add addresses to the SystmOne Address book
- Monitor referrals via Referral Tracking
- Amending document templates
- Create and amend a Clinical View

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