Morecambe Bay Primary Care Collaborative

Extended Access Training Guides

Support: mbpcc.extendedaccess@nhs.net

User Management

Introduction

Only provider site administrators have permissions to carry out user management in the extended access EMIS system. This is a security measure. Site administrators can only be assigned by MBPCC and are granted permissions to carry our user management for clinical and admin staff within their own organisation only.

Adding New Users

Go to Configuration->Organisation Configurations->Users.
Click Add->Add New User.

The User details page is self-explanatory.

Move on the Role page and complete as per the information and screenshots below.

For mnemonic please use our standard format which is *<provider abbreviation><user initials>*.

Provider abbreviations:

Provider	Abbreviation	Provider	Abbreviation
Abbey Road Surgery	ARS	Market Street Surgery	MSS
Ash Trees Surgery	ATS	Park View Surgery	PVS
Bay Medical Group	BMG	PDS Medical	PDS
Cartmel Surgery	CS	Queen Square Surgery	QSS
Dr Murray & Partners	DMP	Waterloo House Surgery	WHS
Lancaster Medical Practice	LMP		

Example: Mikey Maxwell at Bay Medical Group would have mnemonic BMGMM.
If warned the mnemonic exists then add a number 1, 2 etc to the end.

Job Category

Please use one of the following job categories:

GP Clinical Practitioner->Primary Care->General Medical Practitioner

ANP Health Professional->Pharmacy->Pharmacist

Pharmacist Health Professional->Advanced Practitioner

**Nurse** Nurse->Community Health->Community Nurse

HCA Healthcare Student->Healthcare Assistant

Phlebotomist Healthcare Professional->Phlebotomist

Receptionist Receptionist->Receptionist

Default location

You can set the default location as the user is most likely only going to be working from your practice site. Click the search glass and then expand the Extended Access Sites folder. Select your site from the list.
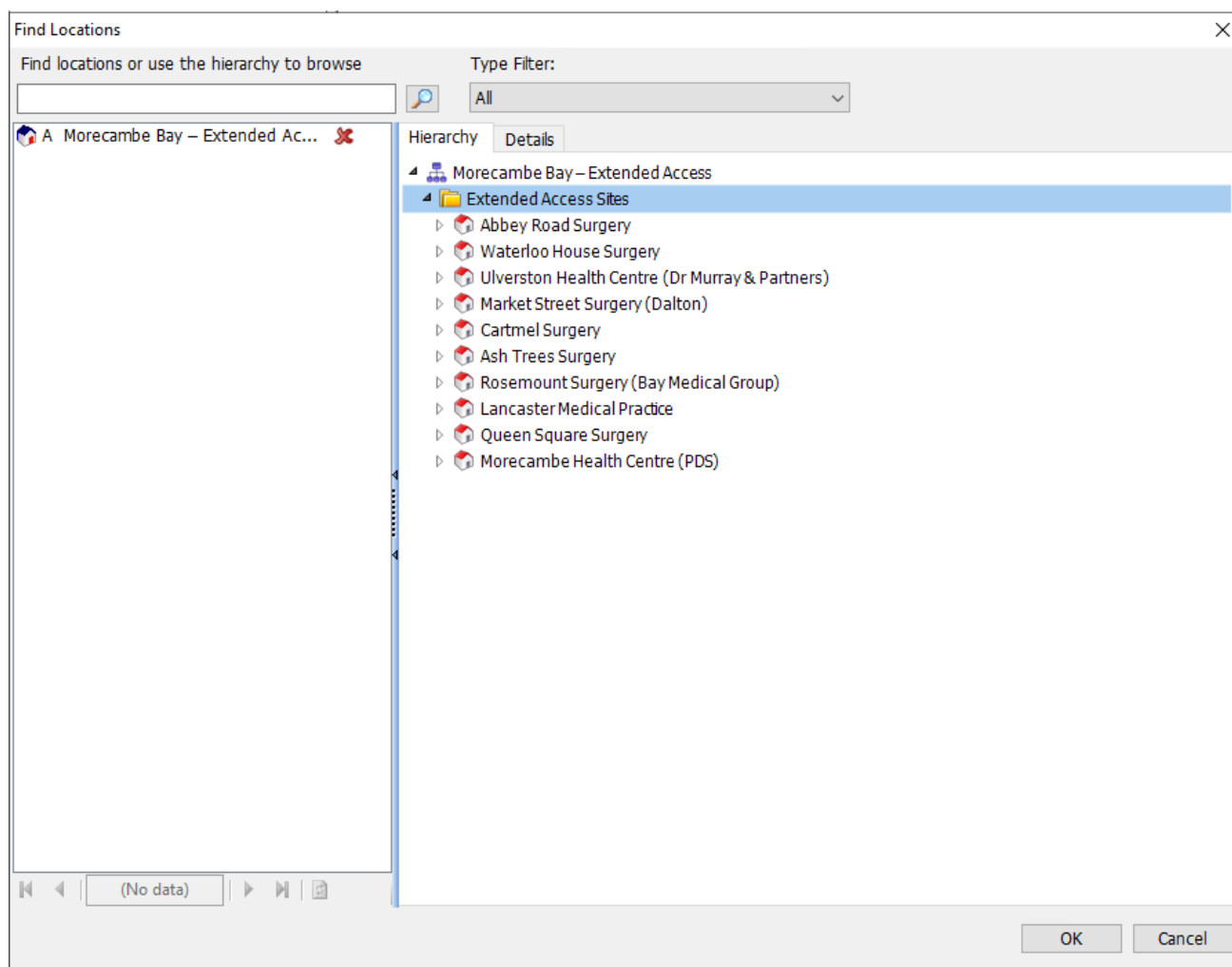
You can now skip directly to User Role Profiles page.

In order for clinical users to be able to consult under remote consultation, they must be assigned an NHS Role Profile as their RBAC Role. The role is usually defaulted based on the Job Category that was entered on the previous screen.

The following are the correct NHS Role Profiles to use, and the additional RBAC activities that need to be added.

User Type	NHS Role Profile	Additional RBAC activities to add
GP	Clinical Practitioner Access Role	
Prescribing ANP	Clinical Practitioner Access Role	
Site admin	Practice Manager Role	
Non-prescribing ANP	Nurse Access Role	B0264 Access CSA (Perform Patient Trace) B8011 Perform Clinical Documents B8017 Manage Patient Administration B0862 Manage Staff Diary/Rotas
Nurse	Nurse Access Role	B0264 Access CSA (Perform Patient Trace) B8011 Perform Clinical Documents B8017 Manage Patient Administration B0862 Manage Staff Diary/Rotas B8020 Perform Test/Investigation Requests
Pharmacist	Healthcare Professional	B0264 Access CSA (Perform Patient Trace) B8011 Perform Clinical Documents B8017 Manage Patient Administration B0862 Manage Staff Diary/Rotas
HCA/Phlebotomist	Healthcare Professional	B0264 Access CSA (Perform Patient Trace) B8011 Perform Clinical Documents B8017 Manage Patient Administration B0862 Manage Staff Diary/Rotas B8020 Perform Test/Investigation Requests
Receptionist	Receptionist Access Role	B0264 Access CSA (Perform Patient Trace) B8017 Manage Patient Administration B0862 Manage Staff Diary/Rotas

Now jump to the Cross Organisation Sharing page. Change the settings to match the screenshot below.

Once this is all complete click OK.

Editing Users

Editing a user is very similar to adding a new user except the fields are already completed and need to be changed.

You can use the Search button on the toolbar or navigate through the user hierarchy to find the user you want to edit.

Use the information in the Adding New Users section above to ensure you comply with our formatting and profile conventions.

Deactivating Users

It isn't possible to delete users from EMIS. If they leave your organisation or no longer need access to the extended access service EMIS system then you should deactivate their account.

You can use the Search button on the toolbar or navigate through the user hierarchy to find the user you want to deactivate. Then simply press Deactivate on the toolbar and confirm you wish to proceed.

If you need to find a deactivated user, you can click on All Users on the toolbar and then click Activate to reinstate them.