



**NHS South, Central and West (SCW)  
Informatics Services  
IT Training and Support Prospectus  
EMIS Web**

2021 - 2022

# Welcome

The IT Training and Support team is an integral part of SCW Informatics Services, providing clinical and business IT training and support to GP/PCN, corporate and other healthcare customers.

We are working hard to adapt our training to meet the needs of our customers, in an increasingly fast-changing healthcare landscape, by offering a high quality, value-for-money training and support service for new members of staff in GP practice/PCNs and CCGs; as well as providing refresher training for existing staff members.

Currently our training and support is offered 'on-demand' to our customers and delivered online, in accordance with ongoing COVID-19 NHS and national guidance. We hope to be able to offer face-to-face and group training once these restrictions have been lifted and the guidelines indicate that it is safe for us to do so.

In exceptional circumstances, and with the appropriate precautions in place, on-site support can be arranged e.g., where floorwalking support is required for system migrations, or where connectivity is a major issue.

Where a more bespoke approach is required, especially with new and additional roles, we will work closely with our customers to develop and deliver the appropriate training and support.

Among our trainers are subject matter experts across a range of clinical systems and business (office) applications, who can provide advice and guidance to support optimising system functionality, data quality, interoperability, and the interdependencies of GP IT (GPSoC) systems. All our trainers are skilled practitioners, who can adapt their delivery to the individual needs of their delegates and the customers they are supporting.

## Document Control

Whilst this document may be printed, the electronic version is the controlled copy. 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.

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# Visit our website

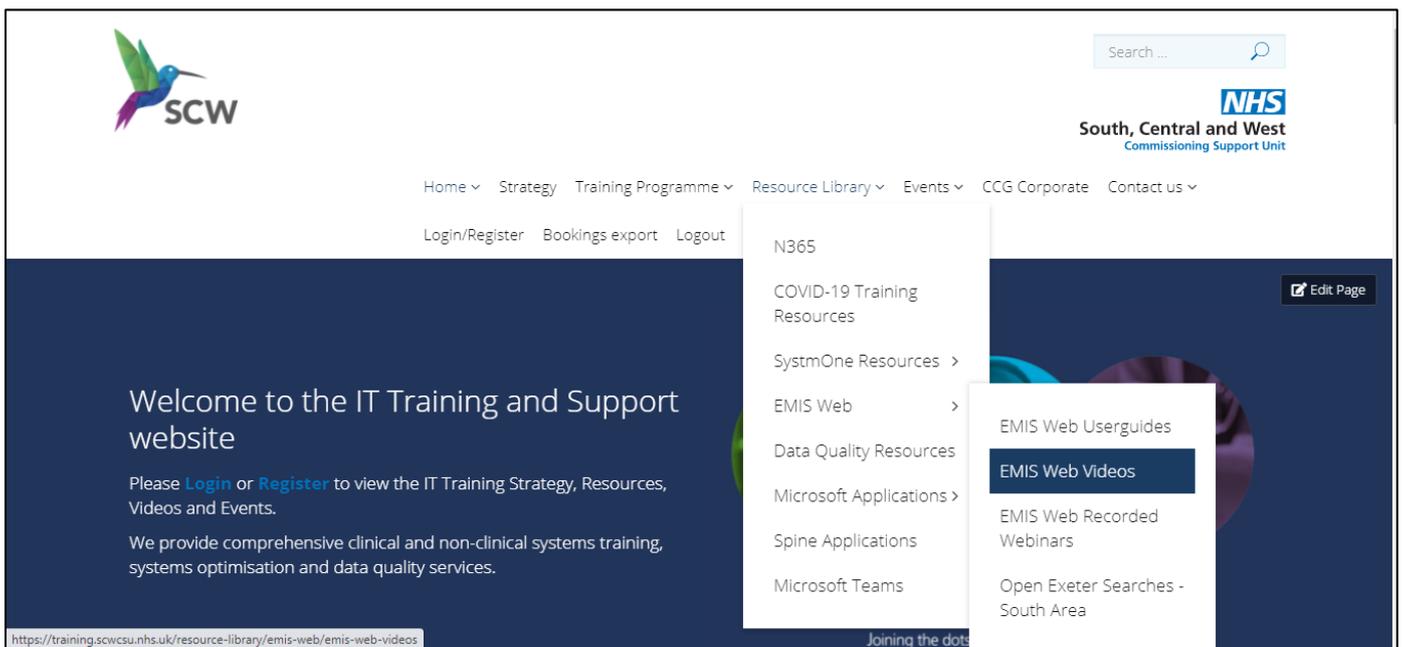
Find out more about who we are and what we do by visiting <https://training.scwcsu.nhs.uk/>

While our website is accessible to view independently, we recommend that you register to create an account. Registering for an account is free, simple and gives access to our many training materials and resources, including:

- COVID-19 IT Training and Additional Resources
- Latest EMIS and National system updates and news
- Subject matter covering EMIS Web, MS Teams, N365 (MS Office)
- User Guides EMIS e.g., Searches & Reports, Clinical Templates
- Videos covering key EMIS functionality, e.g., Managing Diary Entries, Sending a Task, etc,
- Recorded webinars, e.g., Creating a Flu Protocol, Managing Clinical Views, etc.
- (coming soon) e-learning modules for core clinical and admin functionality in EMIS



From our homepage click on the [Login/Register](#) link in the top-right (just underneath our logo) and, if you haven't already, register for an account – it only takes a couple of minutes and our Admin team will be able to set you up in no time.



# How to book an IT training session

Once you have used this prospectus to help decide what training you would like, you can book a training session with us by doing one of the following:

1. Call our Admin team on 0300 123 5678, 9am to 5pm, Monday to Friday, with your request
2. Send an email any time to our Admin team at [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net) with your request
3. Visit our website <http://training.scwcsu.nhs.uk/> and follow the links to make your request from there

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.

## Training Delivery

### Online training sessions and webinars

For our online training we are using MS Teams. Pre-booked online IT training sessions usually last 2 hours and are interactive (i.e., Q&A, hands-on demos) wherever possible.

We also continue to run live webinar sessions in specific clinical system functionality (e.g., EMIS Workflow management, eRS worklists, etc.), available to all our customers. Live webinar via MS Teams sessions last approximately 45 minutes to 1 hour and attendees have the opportunities to ask questions as part of the demonstrations. Live webinar via MS Teams sessions are recorded and posted on our website (see below).

### Videos and E-learning

We have an extensive selection of short online training videos and recorded live webinars, available on our website 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.

# How to request IT training support

To request IT training support:

1. Call our Admin team on 0300 123 5678, 9am to 5pm, Monday to Friday, with your query
2. Send an email any time to our Admin team at [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net) with your query, providing details of the best way to contact you back

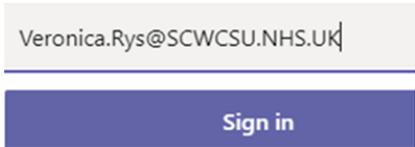
As well as pre-booked training we also provide direct one-to-one telephone and virtual online support for ad hoc queries and training needs. This service is available during office hours, 9am to 5pm, Monday to Friday. Your call will be assigned to one of our experienced trainers, who will contact you 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:  
**Join on your computer or mobile app**  
[Click here to join the meeting](#)  
**Or call in (audio only)**  
[+44 20 5678 9012\\_10123289#](#) United Kingdom, London  
Phone Conference ID: 101 232 89#
2. If possible, ensure that you will have somewhere quiet and undisturbed for the training session and check that the PC (or laptop) there has a working internet connection and (if required) access to the clinical system being trained
3. To access MS Teams audio, you will need a headset (or mobile phone earpiece) connected to your PC/laptop OR you could use a desk phone to call the number in the calendar appointment
4. **In advance of the training**, check that you are correctly logged in to the desktop (App) version of MS Teams (please see below) and make a test call (see next step)
5. Click your Profile image/initials (top right-hand corner) and choose Settings > Device > Make a test call
6. Then, on the day of training, preferably a few minutes before, go into your calendar and click the link: [Click here to join the meeting](#)

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

1. **If you don't have a Teams icon on your desktop, please contact your IT support for installation**
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 will try to use your Windows account which may look something like this:  

5. Replace it with your NHS Mail (@nhs.net) email address
6. Click Sign in and enter your NHS Mail password
7. If it is requested, enter the 6-digit code sent to you by text or email
8. You will now be correctly signed-in to MS Teams and will be able to use the full functionality

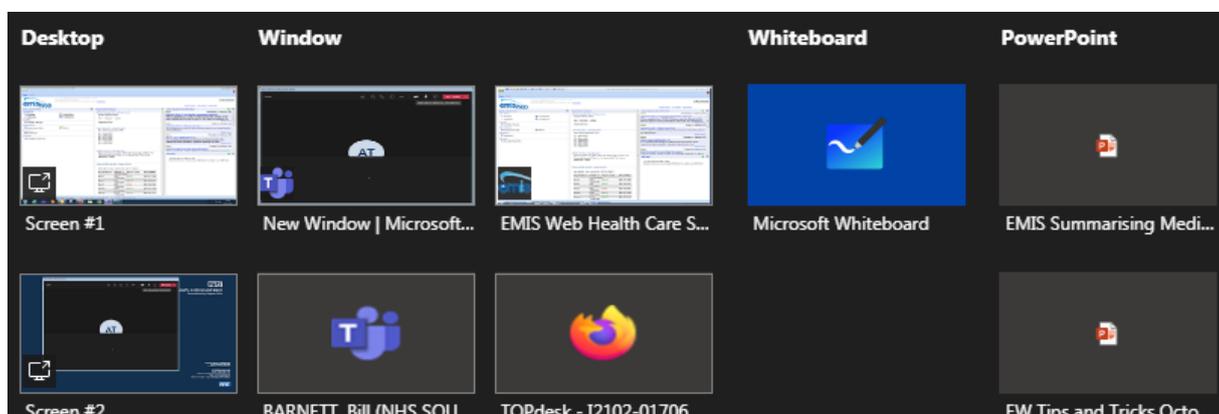
## How to share your screen during the training session (where appropriate)

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 'wobble' your mouse to view it.

1. Click the Screen Sharing icon in your Teams toolbar



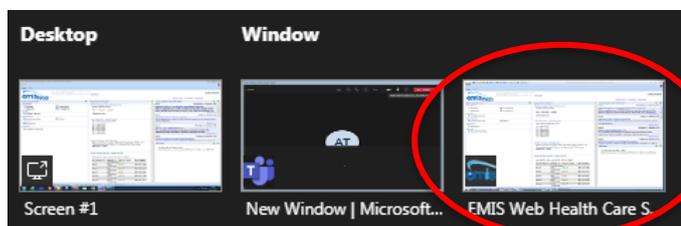
2. Your Teams screen will 'move up' and display your sharing options below



3. Select your **Desktop** option (Screen #1 or Screen #2 if you have more than one monitor)



**NOT** the Window option (as this will not display any picklist options to those viewing your screen)



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**

# Core Clinical System training

For more information and to make a booking, please visit our website <http://training.scwcsu.nhs.uk/>, or contact our Admin Team on **0300 123 65678**, or email [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net).

## New Starter training for non-clinical staff

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### Method of Delivery

Live webinar 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

## New Starter training for clinical staff

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### Method of Delivery

Live webinar via MS Teams

### Duration

1 ½ - 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

# Basic Searches and Reports

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## Method of Delivery

Live webinar 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 / CCG 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 CCG 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

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### Method of Delivery

Live webinar 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 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

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## Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

## Duration

- 2 hours for live webinar - more than one session may be needed to cover all required content
- 45min video available on our website

## 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

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## Method of Delivery

Live webinar 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

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## Method of Delivery

Live webinar 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

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## Method of Delivery

Live webinar 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

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## Method of Delivery

Live webinar 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

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## Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

## Duration

- 1-2 hours for live webinar training
- 45 mins video available on our website

## 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

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## Method of Delivery

Live webinar 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 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:

- 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
- 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

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## Method of Delivery

Live webinar 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

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## Method of Delivery

Live webinar 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, edit, and display Clinical Views
- 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

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## Method of Delivery

Live webinar 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

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### Method of Delivery

Live webinar via MS Teams

### Duration

1-2 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

# Data Quality training

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/>, contact our Admin Team on **0300 123 65678**, or email [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net).

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

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### Method of Delivery

Live webinar 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

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### **Method of Delivery**

Live webinar 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

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## Method of Delivery

Live webinar 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, SNOMED CT 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
- Understand the transition from Read codes to SNOMED CT including key changes and benefits
- 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

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## Method of Delivery

Live webinar 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. We recommend that users 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

# System Optimisation

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 Admin Team on **0300 123 65678**, or email [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net).

## Creating a Flu Protocol

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### Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

### Duration

- 1 hour for live webinar training
- 45 mins video available on our website

### Who is this training for?

This webinar 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** – at the of the session learners will be 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

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## Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

## Duration

- 1-2 hours for live webinar training
- 45 mins video available on our website

## 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** – at the of the session learners will be 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

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### Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

### Duration

- 1 hour for live webinar training
- 45 mins video available on our website

### 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 – at the of the session learners will be 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

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## Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

## Duration

- 1 hour for live webinar training
- 30 mins video available on our website

## 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 – at the of the session learners will be 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 different types of diary entry
- View and filter completed diary items
- Manage Diary Entries using the “Recall Scheduler”
- Search on Diary entries

## Consultations: Hints & Tips

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### Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

### Duration

- 1 hour for live webinar training
- 45 mins video available on our website

### 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** – at the of the session learners will be 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

# National (Spine) Applications

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 Admin Team on **0300 123 65678**, or email [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net).

## Managing eRS Worklists

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### Method of Delivery

- Live webinar via MS Teams
- Video available on our website – please register

### Duration

- 1-2 hours for live webinar training
- 45 mins video available on our website

### 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 of the session learners will be able to:

- Referrer Action Required, Awaiting Booking/ Acceptance, Outstanding Referral Letters, Advice & Guidance
- Troubleshooting - Editing/Amending/Expediting E-Referrals
- Referral Assessment Service (RAS) E-Referrals
- Checking Status of a 2 week wait referral

## GP2GP Record Transfer

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### Method of Delivery

Live webinar 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)

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### Method of Delivery

Live webinar 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)

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## Method of Delivery

Live webinar 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.
- Manage the e-referral worklists.
- Action outstanding tasks for the Referral Management Workflow.
- Electronically send referrals for internal authorisation

# Microsoft Office and Teams training

For more information about what courses and support are available in your area, and to make a booking, please visit our website <http://training.scwcsu.nhs.uk/>, or contact our Admin Team on **0300 123 65678**, or email [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net).

## Microsoft Teams Getting Started

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### Method of Delivery

Live webinar via MS Teams

### Duration

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

### Who is this training for?

Anyone who wishes to use MS Teams to send messages

### 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** – at the end of the session learners will be able 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

# Microsoft Teams Meetings

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## Method of Delivery

Live webinar via MS Teams

## Duration

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

## Who is this training 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 online meetings 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

## Microsoft Teams Collaborative working

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### Method of Delivery

Live webinar via MS Teams

### Duration

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

### Who is this training 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

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The 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 Live webinar via MS Teams

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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 a 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 on **0300 123 5678** or [training.scwcsu@nhs.net](mailto:training.scwcsu@nhs.net)

