# GP Deployment – Pre-Import

## Contents



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# Document History

This section should only be used when a new version of an existing document is created. Newer versions should detail which sections have been amended/added, including who reviewed and approved the document.

| Version | Date | Updated by | Approved by | Description |
|---|---|---|---|---|
| **1.0** | 01/07/2024 | Gavin Wignall | Ed Parry | Document created. |
| **1.1** | 13/09/2024 | Ed Parry | Annie Stilwell | Added version control |
| **1.2** | 16/10/2024 | Gavin Wignall | Tom Patterson | Updated introduction with more detail. |

# Introduction

This document has been created to provide a list of approved activities that can be configured as part of the GP implementation for the pre-import phase of the deployment. This is a new stage in the migration process where TPP allows the practice to access the Live system the day before go live to perform the activities listed below. Your practice will be notified when you can access the system and when access will be revoked to complete the migration of your data. The timeframe for this access will be determined based on specific import milestones. The length of time of the access will vary depending on each implementation.

The pre-import phase will follow 'Early Access' and has been developed for practices to complete the final part of the setup in the Live system. This setup is specific to anything that references a staff member. For example, you could match staff smartcards to the SystmOne staff profile or import all the rota templates or applied rotas that are linked to a staff member.

When accessing the system for the pre import no patient data is available. Therefore, you will not be able to perform any function on the system that involves a patient record. For example, you will not be able to backdate consultations into a patient record.

# What can you do?

### *Users*

☐ Get all users logged in with their Smartcard.

N.B. using a username and password if the matching is not automatic for an existing staff member. This is very important for clinical staff who have patients registered with them or have a clinical rota.

☐ Set up and Configure User Preferences

☐ Set up and Configure User Preference Defaults

☐ Propagate User Preference

☐ Import/Export Local Access Rights

Please note that when configuring PPA IDs, setting pathology processing rules, or allocating EPS prescriptions, you may occasionally notice that a staff member is missing from the selection list. This typically happens because the individual has not been granted the necessary access rights to prescribe, process results, or sign EPS scripts.

If you attempt to update local access rights and find they are greyed out or unchangeable, it is likely because the staff member has not yet logged into the system. Logging in ensures their RBAC access rights (as defined by the practice or an RA manager) are properly assigned. Additionally, the staff member has a logon to SystmOne that affects their access.

For example, if a GP/Clinician has used SystmOne at another GP practice you cannot change most of the local access rights. You can however use the 'Import/Export Local Access rights' screen to override the access rights. Please note that this will be overridden when they log in with their smartcard and get the associated RBAC access rights. You can however, export the required access rights from your Deployment environment and then import it into the Live environment. The key access rights are as follows:

- Independent Prescriber
- Digitally Sign Prescriptions
- Pathology User

### *Staff Configuration*

☐ Staff configuration (local access right import, GMC, NMC, etc, GP Codes, Pathology IDs)

☐ Teams configuration

☐ Staff Leave

☐ Issue password to password administrator

☐ Archive Staff

☐ Organisation Preferences (which reference any staff member)

- Appointment Bookmarks
- Appointment Configuration
- Block Appointments
- External Appointment Booking
- GP Connect
- Patient Appointment Links
- Patient Check-in
- Patient Call Screen – Tokens
- Staff Ordering
- Caseloads
- Clinical Coding – Formularies
- Confidential notes
- Countersigning
- Privacy Officers
- Referrals Out
- Sharing
- Tree Configuration
- Device Approval
- Home Screen – Permissions
- Notice Board
- Online Services
- Pathology – Staff Matching
- Prescribing – Prescribing Access
- Registration – Registered GPs and Usual GPs
- Scanning – Forwarding Rules
- Shared Admin / Full Record Sharing Group – if applicable
- Subject Access Requests
- System Connect
- Tasks
    - Rules
    - Sending Tasks
- Teams
- Toolbars
- User Profiles
- Visits – General

☐ Organisation Details – Senior staff members and Privacy Officer

☐ Menu Bar Configuration

## *Appointments*

☐ Rota Templates

☐ Appointment Rooms

☐ Slot Types

☐ Appointment Templates

☐ Applied Rota Templates

☐ Free Slot Search Configurations

☐ Book Textual Appointments

N.B. If you were to book textual appointments then you will need to right-click and match the patient on the Go Live day. Also, any appointment changes from the point of booking textual appointments should be tracked and applied on Go Live day.

### *Clinical Development Kit (CDK)*

☐ Protocols – who can use the protocol

☐ Caseloads

☐ Scan – Upload all the outstanding scanning ready to be processed once live.

### *Reporting*

Please note that any reports that you run will not return any patients. You will be able to build and configure the list below but at this point in the process, no patients will exist in the unit.

☐ Clinical Reporting

☐ Batch Reporting

☐ Report Output Maintenance

☐ Strategic Reporting Extract Configuration

☐ Scheduled Jobs

### *Dispensing*

If you have created all the stock lines for the drugs as part of the Early Access, then you will now be able to get the stock quantities added to the stock lines. If you were to add this, any changes to the stock quantities would have to be manually updated on the stock line.

☐ Amend the Drug Stock Lines

## What can't you do?

This is a list of the following things that cannot be done.

- Registering patients
- Backdating entries i.e. consultation data
- Prescriptions
- Document Management (processing documents and matching to patient records)
- Anything that will need access to a patient record.

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