



# **Set up Guide for EMIS Web Users**

***‘Process SARs and Medical Reports  
in minutes’***

Version 1.0

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### **eMR: support and training completely free to your surgery**

Our support team are available from 8.30-17.30 weekdays.

**email:** [emr@medi2data.com](mailto:emr@medi2data.com)

**Tel: 0333 3055 774** (local call rates apply)

**For a call back** [click here](#) to book into our calendar

A chat box is also available for on line support as you go through set up.

[www.medi2data.com](http://www.medi2data.com)

# Technical Information

## Web Browsers

eMR is a web-based solution. For data security reasons eMR operates on the most recent and secure browsers

Based on user experience we recommend using Google Chrome. You can download Chrome here [Google Chrome](#).



Please note if you leave the screen open during this process without working through them you may have to refresh the connection- do this by clicking the icon the top of the screen in your browser.

## Auto-Population Settings

Some browsers automatically complete fields e.g. with your email address and mobile number. This could be an issue when setting up eMR. If you have problems with fields being auto-populated you can switch the setting off. To do this:

- Go to your browser
- Click the top right-hand corner to bring up a menu
- Go to Settings
- Find Auto-Fill settings. (It may be in 'Advanced Settings')
- Switch off the relevant options.

## Overview of Set Up Process

### Set yourself up in eMR

#### STAGE 1

Intended for the Practice Manager or equivalent, this first step asks you to set up

- i) the Surgery
- ii) you as the 'Chief Administrator' in eMR.
- iii) Accept Terms and Conditions

In this stage, you create your own password you will later use to login to eMR.

### Connect eMR to EMIS Web

#### STAGE 2- EMIS REQUIREMENT

This is the technical aspect of the set up- where we connect eMR to your EMIS Web. It involves

- i) Setting up 'MediData' as a user in EMIS Web
- ii) Selecting and activating eMR from your EMAS menu

**Your surgery is now connected to eMR**

### Add users to eMR

#### STAGE 3

In this final stage you will be asked to sign into eMR and

- i) list all GPs and staff at your surgery who will be using eMR to process SARs or create medical insurance reports (AMRA consents).

## Set yourself up in eMR

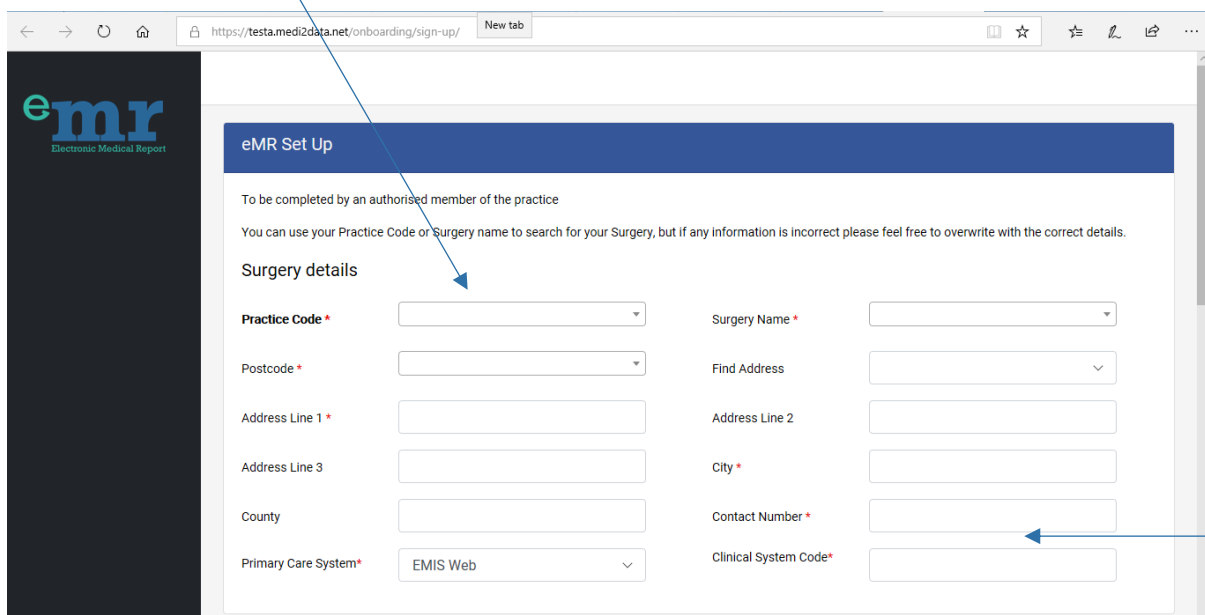
### Stage 1

**Please note:** If during this set up process you get interrupted and get 'logged out', please use this link <https://emr.medi2data.com/accounts/login/> and log in using the email address and password that you chose in this first stage of set up.

#### Let's begin

##### a) Enter your Surgery Details.

We have designed some of the fields to 'auto populate', so you have less typing to do. If you **start with your Practice Code** your surgery should come up automatically. If it does not come up automatically, please enter manually. Fields with an asterisk are compulsory to complete.



The screenshot shows a web browser window with the URL <https://testa.medi2data.net/onboarding/sign-up/>. The page is titled "eMR Set Up" and includes a sub-header "To be completed by an authorised member of the practice". Below this, a note states: "You can use your Practice Code or Surgery name to search for your Surgery, but if any information is incorrect please feel free to overwrite with the correct details." The form is divided into two columns for "Surgery details". The left column contains fields for "Practice Code \*", "Postcode \*", "Address Line 1 \*", "Address Line 3", "County", and "Primary Care System\*" (which is set to "EMIS Web"). The right column contains fields for "Surgery Name \*", "Find Address", "Address Line 2", "City \*", "Contact Number \*", and "Clinical System Code\*". A blue arrow points from the text "start with your Practice Code" to the "Practice Code \*" field. Another blue arrow points from the text "Contact number" to the "Contact Number \*" field.

#### Contact number

Please provide a phone number that would be best for support calls.

Add your **Clinical system code** – that is your **Surgery** EMIS customer number/CDB number

## b) Create your eMR user account

Enter your name and **your email address**. Please note you will receive email alerts generated from eMR, regarding new and outstanding instructions.

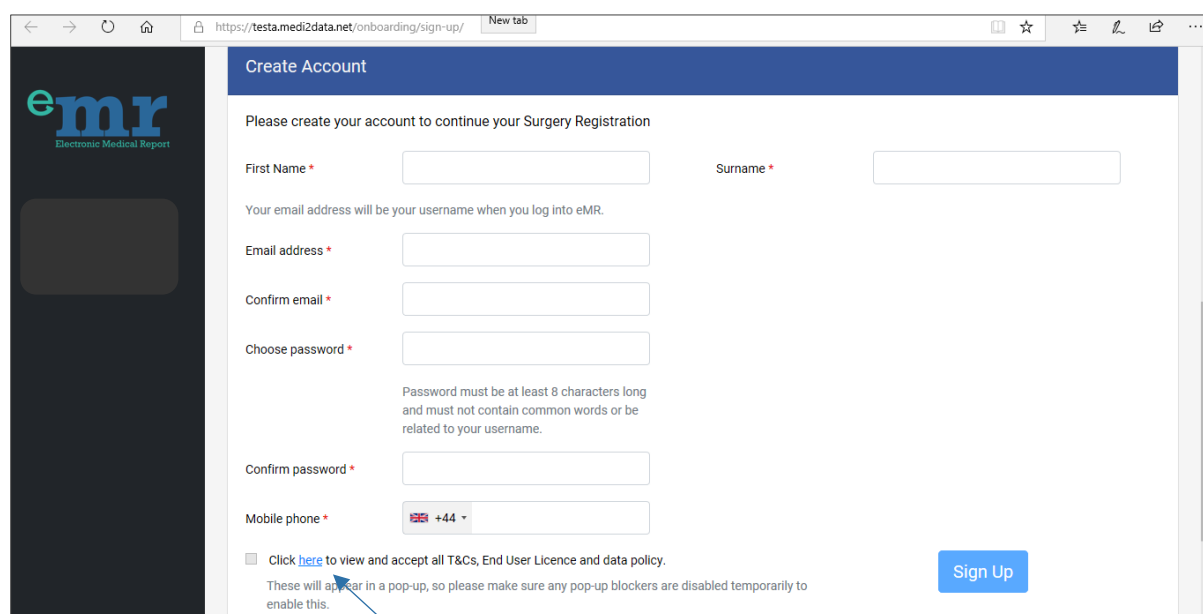
Please note: This email **needs to be different** to the 'Central email address' that will receive all instructions. We will ask you to enter that later.

Next enter a password of your choice. (It must be at least 8 characters with a combination of upper/lower case and numbers).

This is the password you will use to login to eMR when set up is complete- **please make a personal, safe note of it**.

Next, enter your **mobile number**. You may receive a secure access code for authentication purposes when you log in to eMR for the first time.

eMR uses this method of authentication for any users wishing to access eMR from outside the surgery (outside the HSCN NHS environment). e.g.GPs.



The screenshot shows a web browser window with the URL <https://testa.medi2data.net/onboarding/sign-up/>. The page has a dark sidebar with the 'eMR' logo and the text 'Electronic Medical Report'. The main content area is titled 'Create Account' and contains the following fields and instructions:

- Please create your account to continue your Surgery Registration**
- First Name \*** and **Surname \*** input fields.
- Your email address will be your username when you log into eMR.**
- Email address \*** input field.
- Confirm email \*** input field.
- Choose password \*** input field.
- Password must be at least 8 characters long and must not contain common words or be related to your username.**
- Confirm password \*** input field.
- Mobile phone \*** input field with a dropdown menu showing '+44'.
- ☐ **Click [here](#) to view and accept all T&Cs, End User Licence and data policy.**
- These will appear in a pop-up, so please make sure any pop-up blockers are disabled temporarily to enable this.**
- Sign Up** button.

## c) View and accept our Terms and Conditions

Please click on the link, to **view and accept** our Terms and Conditions, End user licence and Data policy.

A summary is provided at the beginning of the document outlining the key points.

**Then click 'Sign up'**

### ***Stage1 is now complete***

Now you need to go to your EMIS Web system and open the EMAS Manager module. **Leave this browser/window open so you can continue to see these on-screen instructions.** If you are able to do a split screen view that would be ideal, if not you can switch screen or follow your printed version of the user guide.



## Stage 2- EMIS REQUIREMENT

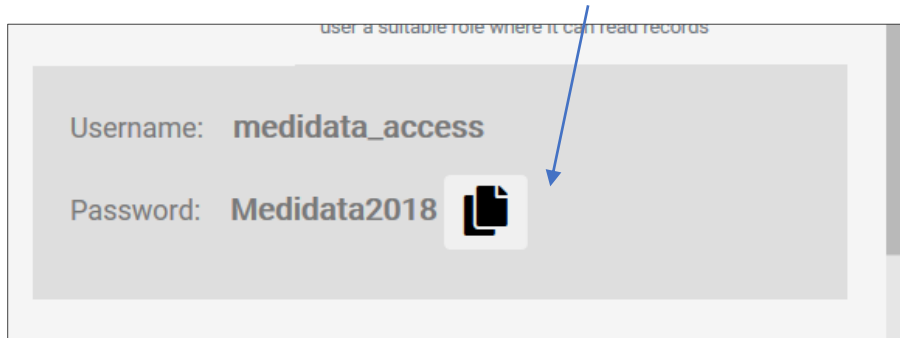
To connect eMR to your EMIS Web involves:

- i) Setting up 'MediData' as a user in EMIS Web
- ii) Selecting and activating eMR from your EMAS module

### Step 1: Add 'MediData' as a new user in EMIS Web

For eMR to work with your system we need you to create 'MediData' as a new user within EMIS Web. (MediData is the company that has created eMR).

You also need to input a **unique password** for your surgery which is automatically generated by eMR. We provide a 'clipboard' to make it easy for you to copy and paste this password. Simply click "clipboard" for your once only generated password.



To check that it has been copied, paste into a word document and make sure it has no additional spaces at the end.

Keep this password safe in case you are interrupted in the set up process. This password should not change.

You will also not use it again once set up is complete.



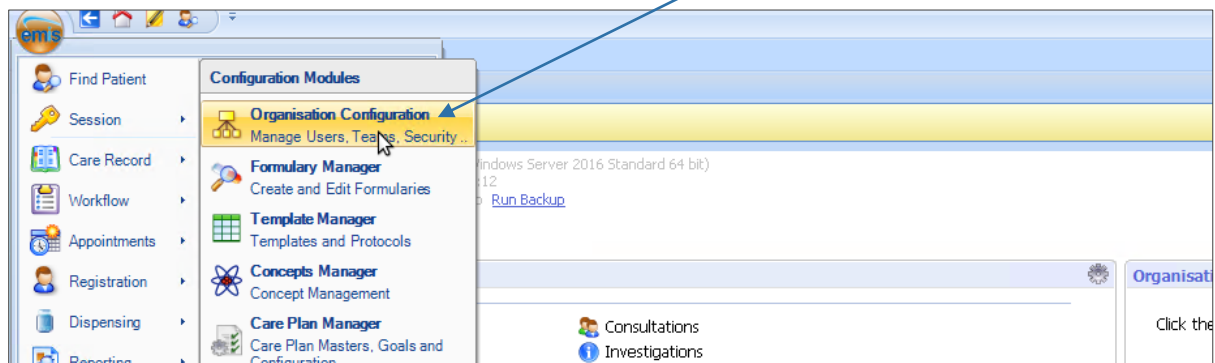
Please note: If you use internet explorer you may get the message below.

Please **'Allow Access'**.

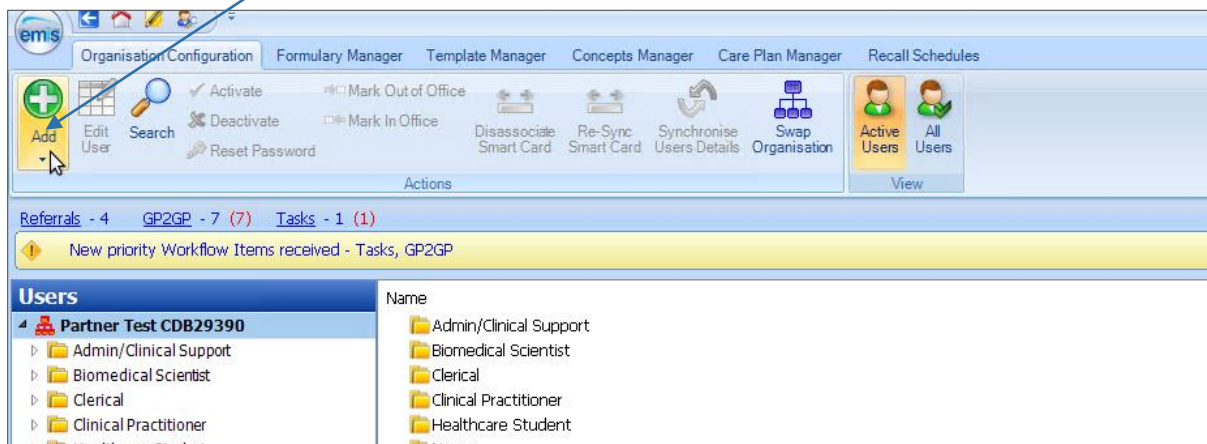


To create MediData as a new user please follow the steps below:

### a) Menu > Configuration > Organisation Configuration



**b) Click the "Add" button, select "New user"**



**c) Input New user details as follows:**

**Title:** Choose 'Mr' from the menu

**First Name:** Medidata

**Gender:** Choose anything from the menu

**Surname:** Access

**Email address:** Not Required

A screenshot of the EMIS 'Add user' form. The form is divided into two main sections: 'User details' and 'Sign in details'. In the 'User details' section, there are fields for 'Title' (set to 'Mr'), 'First names' (set to 'Medidata'), 'Last name' (set to 'Access'), 'Gender' (set to 'Indeterminate'), and 'Email address'. In the 'Sign in details' section, there are fields for 'Username' (set to 'medidata\_access'), 'Password' (masked with asterisks), and 'Confirm password' (masked with asterisks). A checkbox at the bottom indicates 'User must change password on next sign in.' A blue arrow points from the 'Surname' instruction to the 'Last name' field. Another blue arrow points from the 'Password' instruction to the 'Password' field.

When prompted, enter the EMIS Web unique username and password BELOW.

**Username:** medidata\_access

**Password:** unique password automatically generated.

Please Ensure the box underneath remains unticked- so that the password can not be changed.

- d) **Next Give 'MediData' a suitable role with significant clinical authority: General Medical Practitioner**, as shown.

In the rest of this screen you need only complete the asterisked fields.

- Add the Mnemonic 'medidata'
- Set Authorise prescriptions to 'None'
- Set Relationship as 'Associated'
- Enter contract start date with today's date.

The screenshot shows the 'Add user' dialog box in the EMIS system. The 'Role' tab is active. The 'Job Category' is set to 'General Medical Practitioner'. The 'User Mnemonic' is 'medidata'. 'Authorise Prescriptions' is set to 'None'. 'Relationship' is 'Associated'. 'Contract Start Date' is '06-Nov-2018'. The 'OK' button is highlighted with a blue arrow.

Role	
* Job Category	General Medical Practitioner
Appointment Session Holder	<input type="radio"/> Yes <input checked="" type="radio"/> No
Patient Facing Services Booking	None
Consulter	<input checked="" type="radio"/> Yes <input type="radio"/> No
* User Mnemonic	medidata
* Authorise Prescriptions	None
Permit Medication Issue Warning Override	<input type="radio"/> Yes <input checked="" type="radio"/> No
Permit Issuing Drugs with General Alert	<input type="radio"/> Yes <input checked="" type="radio"/> No
Stamp User Choice	Please select...
Formulary	EMIS Standard
Default Location	
Contractual Information	
* Relationship	Associated
* Contract Start Date	06-Nov-2018
Contract End Date	dd-MMM-yyyy
Professional Numbers	
GMC Number	
Doctor Index Number	
GMP PPD Code	
FP10PCD prescriber code	

Press 'OK' to accept

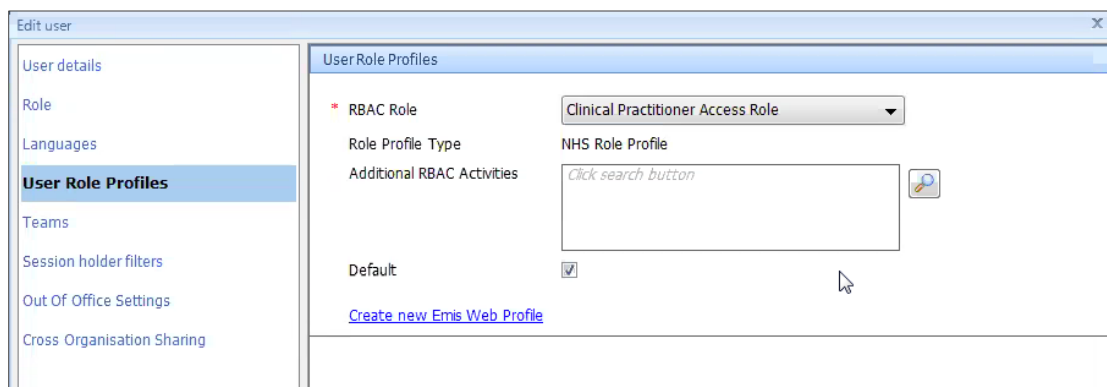
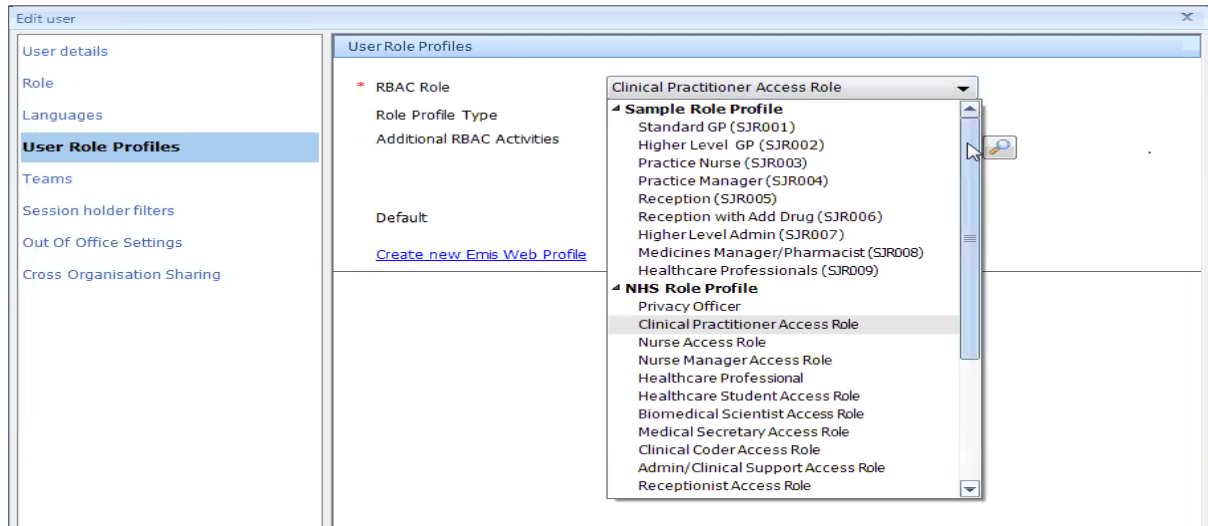
## If your Surgery has RBAC user role permissions – Please give Mr Medidata Access a suitable RBAC Role

Title: Mr

First name: Medidata

Surname: Access

**Add suitable role** – Clinical Practitioner Access Role -Screen shot of RBAC dropdown listing below.



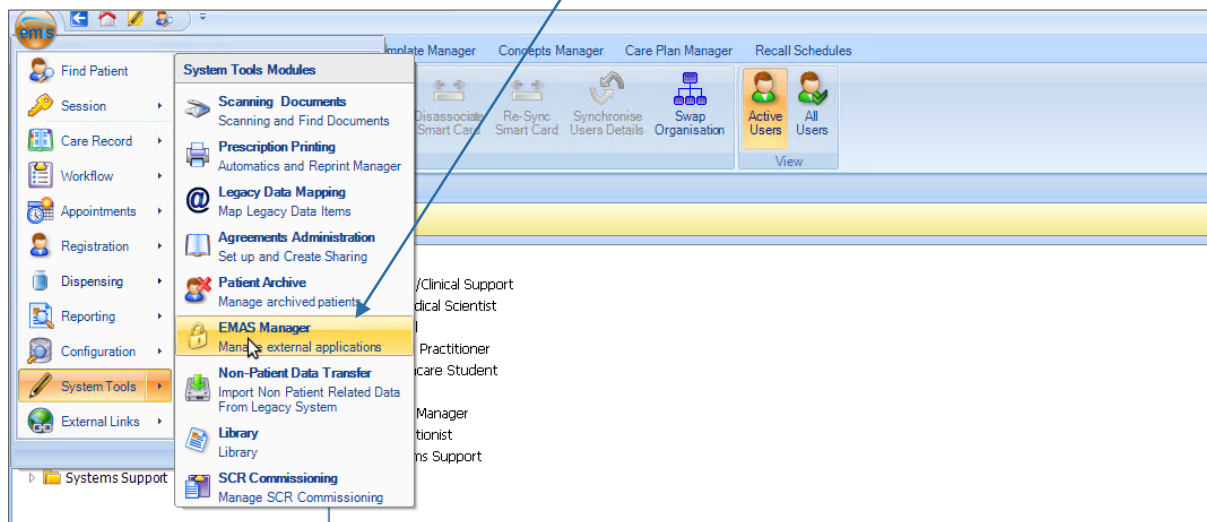
Click OK to accept.

This step is necessary to allow you to have a successful “Check Set Up” and gives sufficient permissions to access and view a Medical report .

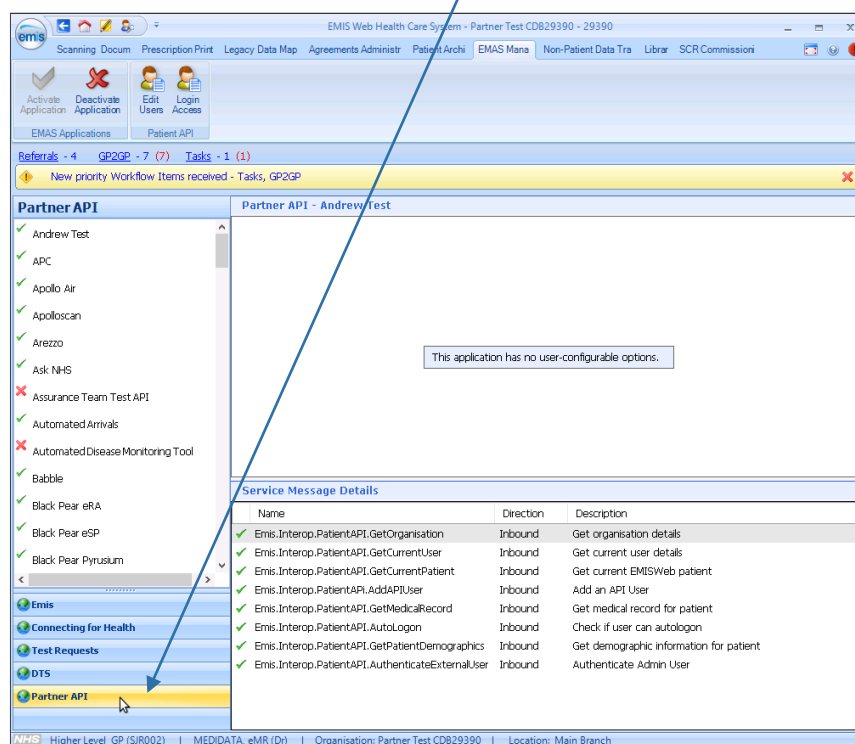
## Step 2: Select and Activate eMR

All your partner products are listed in your EMAS Manager module - this step is simply about selecting eMR. You can do this as follows:

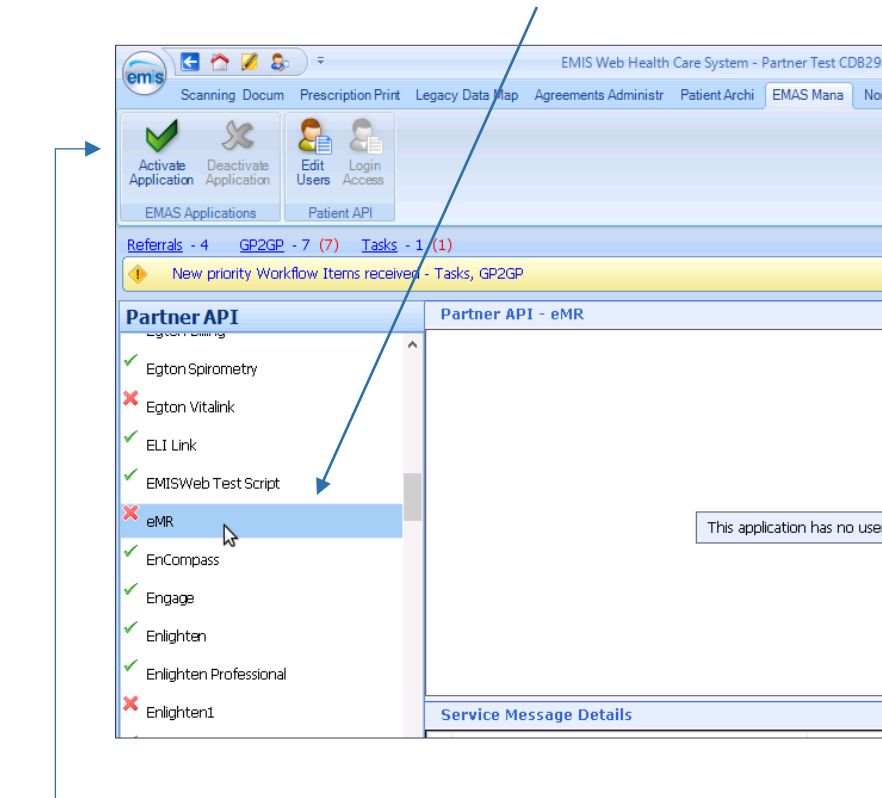
### a) Menu > System Tools > EMAS Manager



### b) Select "Partner API" at the bottom



**c) Select "eMR" in the Partner API list**



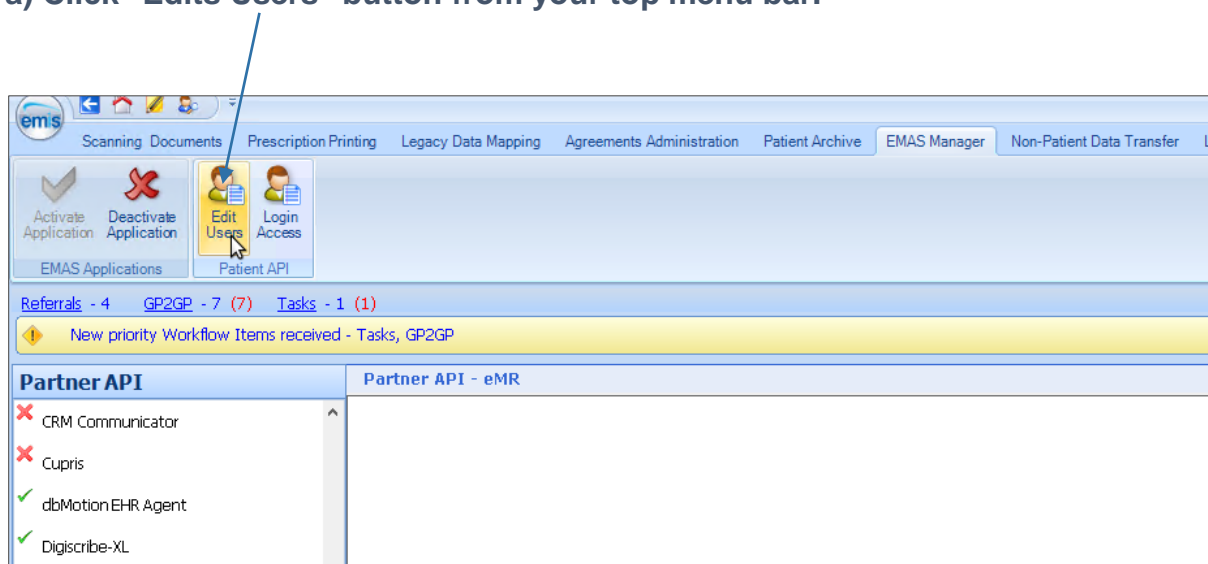
**e) Click "Activate Application" at the top left.**

eMR will now have a green tick next to it.

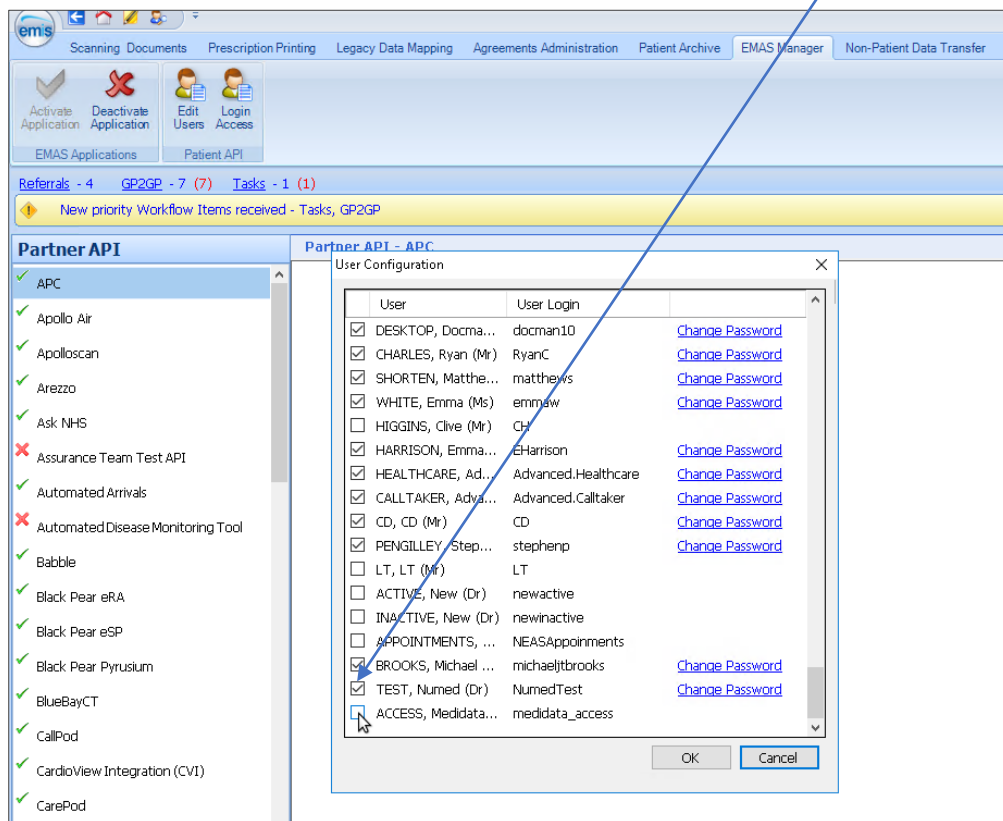
**Step 3: Give permission to eMR to process information**

This allows eMR to use the new user account, 'MediData Access' to securely process your medical records.

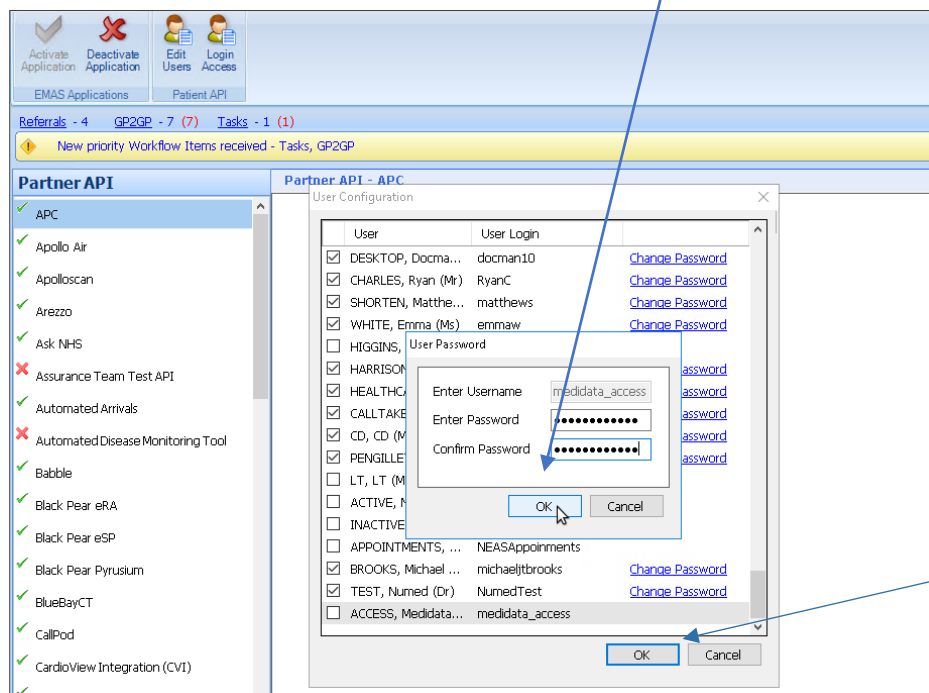
**a) Click "Edits Users" button from your top menu bar.**



a) Find the new user 'MediData Access' and tick the box to the left

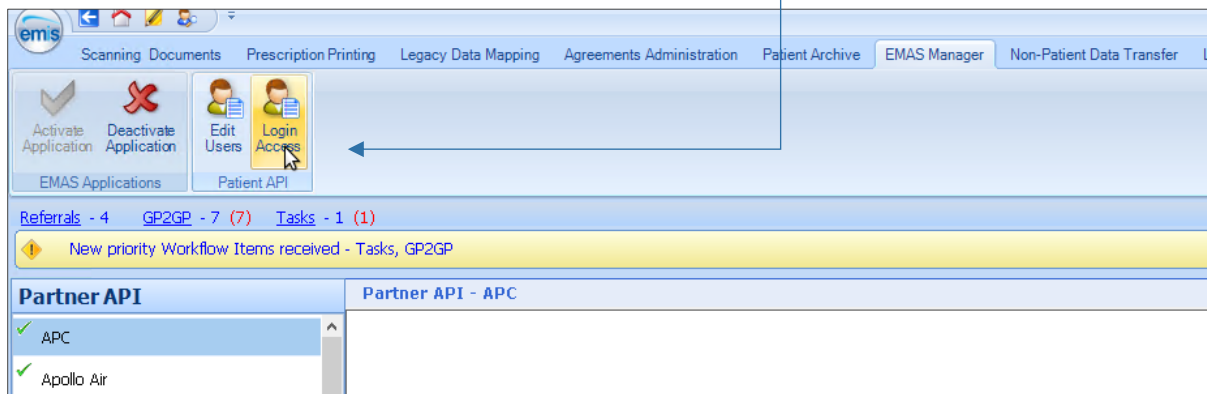


b) You will be asked for the **unique password** provided to you earlier- paste it into the correct field marked below and click 'OK'

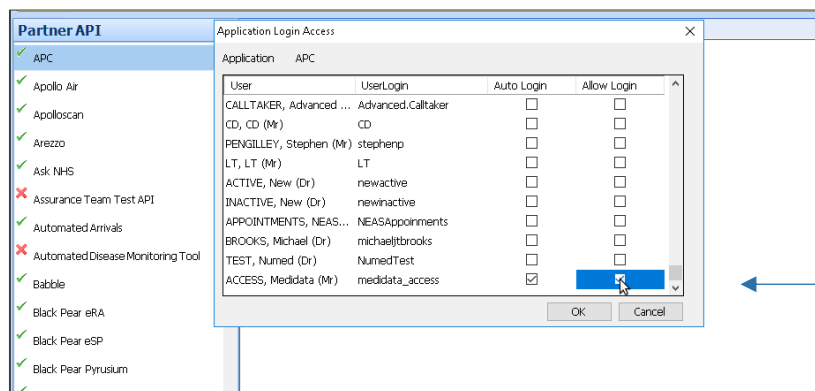


d) Click ok again here

c) Click "Login Access" button on your menu bar.

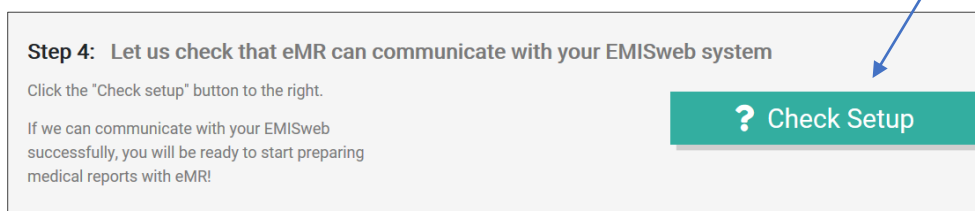


d) Find 'MediData Access' and tick both boxes to the right of it and click 'OK'



*Note: You will not have to use the automatically generated password again- just your own.*

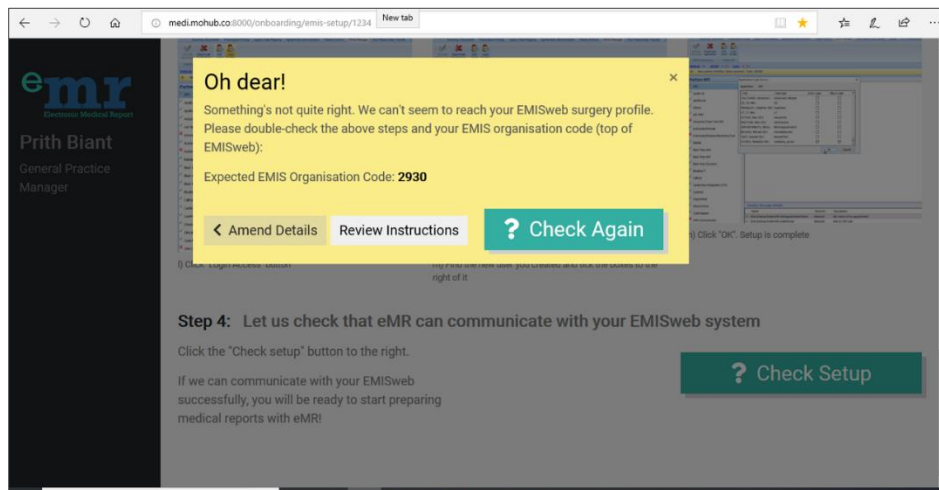
To check it is all working. Click the "Check Setup" button to the right.



*This may take a few moments for the initial connection to EMIS Web to be made*



A 'Login was Successful' message should now be shown. If this was not the case you may see this:



If you receive this message, then your details have not been captured correctly. **Please check and try again.**

When onboarding has been successful you can use eMR.

The first time you use eMR you may see this message. If you do, simply **enter your EMIS Web username and password details.**



## Add users to eMR

### STAGE 3

In this final stage, you come back to eMR, where you will see a screen that has your surgery details pre-populated from the information given in the first section.

**eMR Set Up-Stage 2**

To be completed by an authorised member of the surgery only.

**Surgery details**

Surgery Name: TESTPRITH667

Surgery Code: TEST667

Address: 10 Morgan Arcade Cardiff

Postcode: CF10 1AF

Surgery Tel number: 98273918327

**eMR Users**

Please add the details of anyone who will be using eMR for SARs, Medical Reports, or workflow management. You can skip this step and add users later if you wish.

Title*	First Name*	Surname*	Email*	Role(GP, Other)	Mobile Phone* (required to set up two factor authentication)
---				---	+44
---				---	+44
---				---	+44

- a) You then have the option to add your **'eMR Users.'** These are the people who will be using eMR to process SARs or create medical insurance reports- GPs plus any additional surgery staff. You can come back to this later if you prefer.

**eMR Users**

Please add the details of anyone who will be using eMR for SARs, Medical Reports, or workflow management. You can skip this step and add users later if you wish.

Title*	First Name*	Surname*	Email*	Role(GP, Other)	Mobile Phone* (required to set up two factor authentication)
---				---	+44
---				---	+44
---				---	+44

Please note **the request for mobile phone numbers** are a requirement for secure access to eMR for any staff working remotely i.e. outside of the secure HSCN NHS environment. GPs may wish to use eMR off-site to complete medical reports- in this case you must include their mobile phone numbers here for our dual factor authentication protocol.

Please remember to:

- 1) Click “generate password” after adding users and
- 2) Tick box to send user notification – to send new user an email about their account and allow them to create their login password.
- 3) Tick box to advise of role i.e. Manager, GP or Other Practice Staff

### If adding users at a later time:

From the home screen select ‘User management’ from the menu and add additional members of staff in the same way.

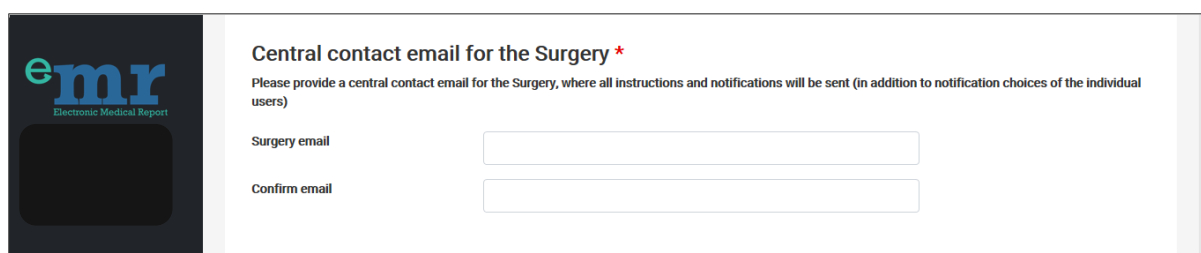
### Permissions

Each user is allocated a permission level. The default position is to give each role permission for all aspects of report processing. This can be changed to suit your surgery.

- b) Next: **Provide a central email account** that will receive **all instructions and notifications** from eMR visible to the WHOLE surgery, if possible.

### Central Contact Email

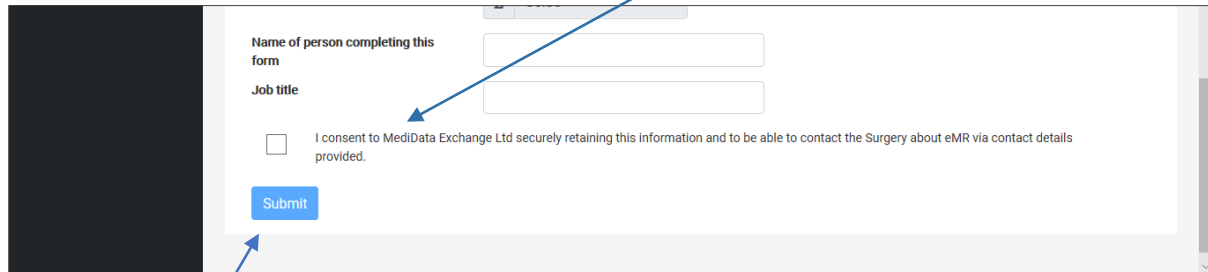
eMR will send all request for insurance medical reports to one central inbox. You can then allocate the requests to GPs within your surgery by accessing the SMART Dashboard. Having one central inbox makes it easier for you to manage the inflow of requests. **Please note this must be different to the email you entered for yourself as a user.**



The screenshot shows the eMR system interface. On the left is a dark sidebar with the 'emr' logo and 'Electronic Medical Report' text. The main content area is white and titled 'Central contact email for the Surgery \*'. Below the title is a instruction: 'Please provide a central contact email for the Surgery, where all instructions and notifications will be sent (in addition to notification choices of the individual users)'. There are two input fields: 'Surgery email' and 'Confirm email', each with a corresponding text box to its right.

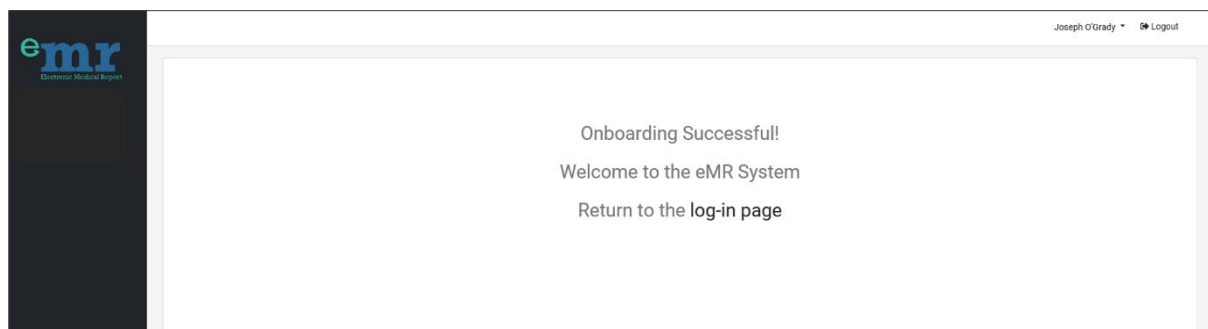
### c) Provide permission for us to contact you

We ask for permission to keep your details, so that we can contact you again under GDPR guidelines.



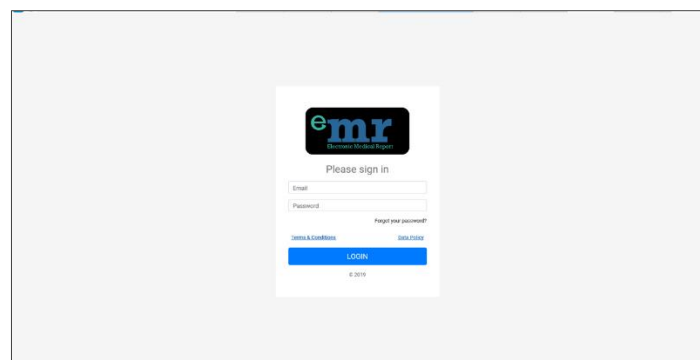
The screenshot shows a web form for onboarding. It has two input fields: "Name of person completing this form" and "Job title". Below these is a checkbox with the text "I consent to MediData Exchange Ltd securely retaining this information and to be able to contact the Surgery about eMR via contact details provided." A blue "Submit" button is at the bottom. Two blue arrows are overlaid: one points to the checkbox, and the other points to the "Submit" button.

Then press submit and set up is complete!



### What next?

Now you are set up please go through our training programme which you can access when you log into eMR. The login link is here <https://emr.medi2data.com/accounts/login/>



eMR is very intuitive, so once you familiarise yourself with the layout and working of the system you will be processing SARs and completing insurance reports in minutes.

You can **find all training materials in our 'Resource Centre'** in the menu bar on the left.

### Create a shortcut

*To log in to eMR quickly you can either- book mark the web link or create an eMR short cut for your desk top. Do this by following the steps below:*

Copy the link <https://emr.medi2data.com/accounts/login>

- *Windows + D (To take you to desktop)*
- *Right click*
- *New*
- *Shortcut*
- *Paste link*
- *Next*
- *Name the link 'eMR'*
- *Finish!*

You will now have a short cut that takes you straight to the log in page.

### **eMR: support and training completely free to your surgery**

For any queries or support required, please contact our support team available from 8.30-17.30 weekdays.

**email:** [emr@medi2data.com](mailto:emr@medi2data.com)

**Tel:** 0333 3055 774 (local call rates apply)

**For a call back** [click here](#) to book into our calendar

[www.medi2data.com](http://www.medi2data.com)