



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

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

Version 2.0

## Overview of Process

### Stage 1 - Create a Surgery Account in eMR

### Stage 2 - Create your account in eMR

### Stage 3 - Connect eMR to EMIS Web

Comprising the following steps

- i. Add a new user to EMIS Web for eMR
- ii. Activate the eMR partner product
- iii. Give the new EMIS Web permission to use eMR
- iv. Check that eMR can communicate with your EMIS Web system

As well as this guide you will also find onscreen instructions to assist you.



To start, please ensure you use Chrome as your preferred browser: click here to install <https://www.google.com/chrome/>



To set up eMR click <https://emr.medi2data.com/onboarding/step-1/>

#### **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)

## Stage One: Create a Surgery Account in eMR

Add details about your surgery. If you start with your Practice Code then additional fields may be completed automatically.

Points to note:

-[Central surgery email address](#): this will be the email that all the medical report instructions will be sent to. This must be different to the email you used for your own login.

Then:

[Read and accept T&C's](#) – click on these to read, this then allows a tick to be added to accept.

Accept contact from MediData

## Stage 2 - Create your account in eMR

**Set up your own account by completing the form on screen.**

1. [Email address](#) – please ensure you use [your individual email address](#) for your own login- eMR is case sensitive
2. [Password note](#) Please make a note of your password as you will need it to login to eMR.
3. [Mobile number](#)- We ask for your mobile number as part of our security protocols. This will also allow you to access eMR off-site, outside the secure HSCN NHS environment. We will not use your mobile number for any other reason.

### Add additional Users

You now have the choice to either [set up other members of staff](#) now or later.

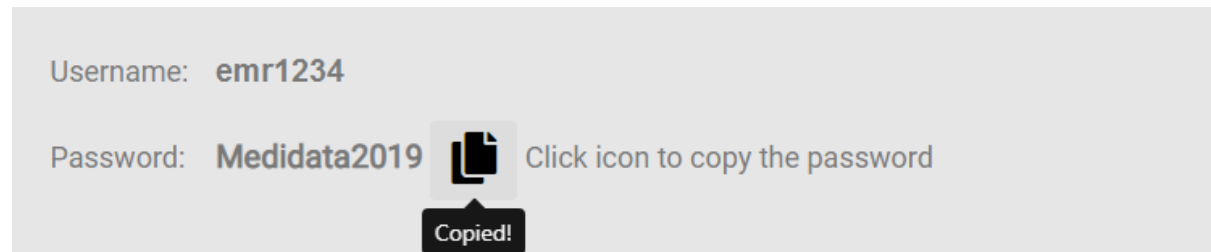
Simply add their names, email addresses and select an appropriate role. You will need a mobile number for them as part of our security protocols- as mentioned above. They will then each be sent an email notification giving them access to eMR.

***That is Stage 2 complete!***

**Now you need to go to your EMIS Web system.**

**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 screens or follow your printed version of the user guide.

eMR will generate a unique password for you to use in EMIS. As you go through the on-screen instructions you will see the following:



Simply click the “clipboard”, you will then see a message that says ‘Copied’ and then [right click to paste](#) when you are asked for a password in EMIS Web and EMAS manager.

## Stage 3: Connect eMR to EMIS Web

### Step 1: 'Add eMR as a new user'

>Select configuration >Organisation configuration >Add >Add new user

Then input the following:

**User Details: all lower case**

**Title:** Optional (This guide uses Mr)

**First Name:** emr

**Surname:** emr

**Gender-** optional

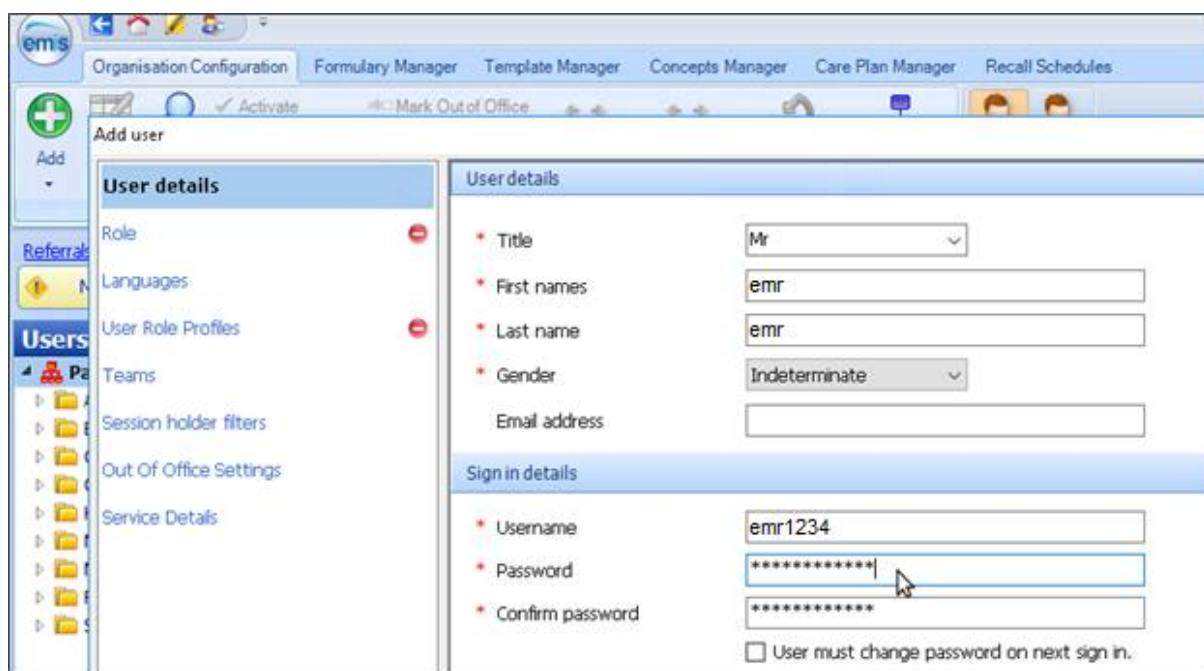
**Email address-** not required

#### Sign in details

Your **user name**, in EMIS web when you create a user will be 'emr' followed by your unique EMIS code e.g. 'emr1234'

**Username:** emr[insert EMIS code] e.g emr1234

**Password:** Click "clipboard" icon to copy and right click with the mouse and paste the password into field.



The screenshot shows the 'Add user' form in the EMIS web application. The form is divided into two main sections: 'User details' and 'Sign in details'. In the 'User details' section, the 'Title' is set to 'Mr', 'First names' is 'emr', 'Last name' is 'emr', and 'Gender' is 'Indeterminate'. The 'Email address' field is empty. In the 'Sign in details' section, the 'Username' is 'emr1234', the 'Password' and 'Confirm password' fields are masked with asterisks, and the checkbox 'User must change password on next sign in.' is unchecked. The left sidebar shows the navigation menu with 'Users' selected.

**Please Untick 'User must change password on next sign in'**

## Assign the correct role

- Give 'emr emr' the role of 'General Medical Practitioner'
- User Mnemonic – this will be your emr+EMIS code as before. (This guide uses 'emr1234' as an example)
- Authorised Prescriptions - None
- Relationship - Associated
- Contract Start date - Today's date

The screenshot shows the 'Add user' dialog box in the EMIS system. The 'Role' tab is selected in the left sidebar. The main area is divided into several sections:

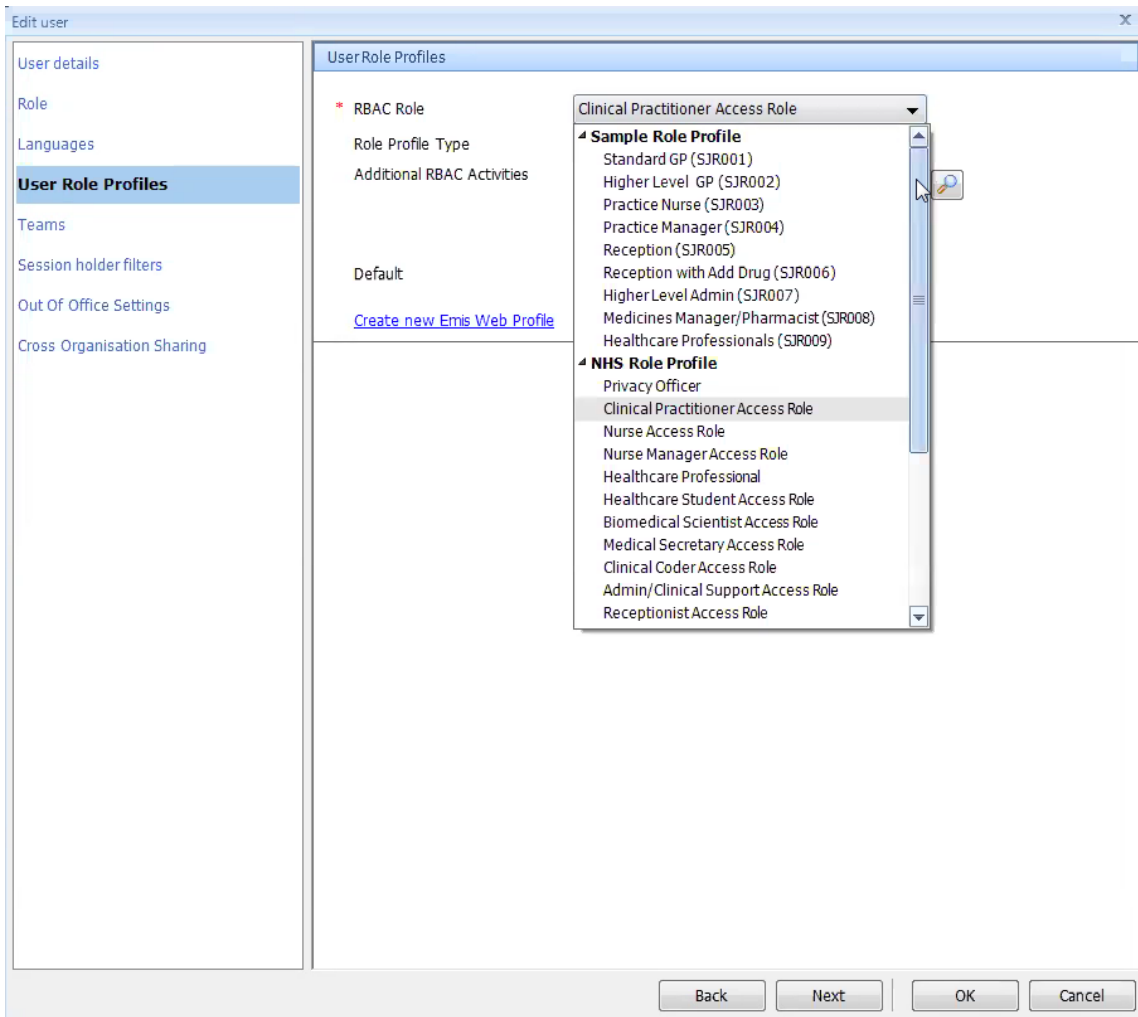
- Role:**
  - Job Category: General Medical Practitioner
  - Appointment Session Holder: ☐ Yes ☒ No
  - Patient Facing Services Booking: None
  - Consultant: ☒ Yes ☐ No
  - User Mnemonic: emr1234
  - Authorise Prescriptions: None
  - Permit Medication Issue Warning Override: ☐ Yes ☒ No
  - Permit Issuing Drugs with General Alert: ☐ Yes ☒ No
  - Stamp User Choice: Please select...
  - Formulary: EMIS Standard
  - Default Location: [Empty field]
- Contractual Information:**
  - Relationship: Associated
  - Contract Start Date: 05-Nov-2018
  - Contract End Date: dd-MMM-yyyy
- Professional Numbers:**
  - GMC Number: [Empty field]
  - Doctor Index Number: [Empty field]
  - GMP PPD Code: [Empty field]
  - FP10PCD prescriber code: [Empty field]

Navigation buttons (Back, Next, OK, Cancel) are located at the bottom right of the dialog box.

## Check Role Profiles (RBAC)

If you have RBAC roles in your surgery, please ensure you add 'Mr **emr emr**' and assign him as '**Clinical Practitioner Access Role**'

Click OK.



## Step 2: Activate the eMR partner product

- Menu > System Tools > EMAS Manager
  - Select "Partner API" at the bottom left hand side
  - Select "eMR" in the Partner API list
  - Click "Activate Application" at the top left.
- ✓ eMR will now have a green tick next to it.

### Step 3: Give the new EMIS Web permission to use eMR

This allows eMR to use 'emr emr' to securely process your medical records.

- a) Click **"Edits Users"** button from your top menu bar.
- b) Find the new user **'emr'** and tick the box to the left
- c) You will be asked for the **unique password** provided to you earlier- paste it into the correct field and click 'OK'
- d) Click **"Login Access"** button on your menu bar
- e) Find **'emr emr'** and tick both boxes to the right of it and click **'OK'**
- f) Click into eMR setup screen and continue – click next on all the pictures until you see the progress bar is at 90%

### Step 4: Check that eMR can communicate with your EMIS Web system

**To check it is all working.** Click the "Check Setup" button. You should now see the following message: **'Connected'**

### You are now set up in eMR

Please go the Resource Centre (see left hand bar in your menu) and view the SARs video to learn how easy it is to use. We suggest you practice on a 'dummy patient' to familiarise yourself with the system.

### This is your link to access eMR

<https://emr.medi2data.com/accounts/login>

**You may want to bookmark or create a shortcut for this on your desktop.**



### **Adding users at a later time**

From within the home screen go to 'User management' from the menu on the right-hand side.

**Add users** –ensure you click

- 1) "Generate password" after adding users.
- 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 you have any problems, please contact us- we are here to help.**

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