



# Quick Set up Guide for EMIS Web Users

*'Process SARs and Medical Reports  
in minutes'*

Version 2.0

## Stage 1 - Create an eMR account in eMR

## Stage 2 - Connect eMR to EMIS Web

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/sign-up/>

### **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

### About Your Surgery

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

## Next

### Set up your own account

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.

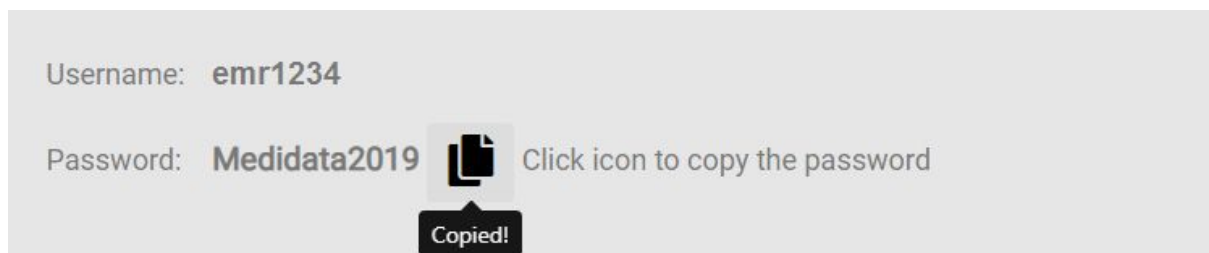
Simply add their names, email addresses and select an appropriate role. You will need a mobile number for them as part of our security protocols- as mentioned above. They will then each be sent an email notification giving them access to eMR.

***That is Stage 1 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 Two:

### 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 interface. The form is divided into two main sections: 'User details' and 'Sign in details'. The 'User details' section includes the following fields: Title (Mr), First names (emr), Last name (emr), Gender (Indeterminate), and Email address. The 'Sign in details' section includes the following fields: Username (emr1234), Password (masked with asterisks), and Confirm password (masked with asterisks). A checkbox labeled 'User must change password on next sign in.' is present at the bottom of the form.

**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+EMIScode 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' form in the EMIS system. The form is divided into several sections:

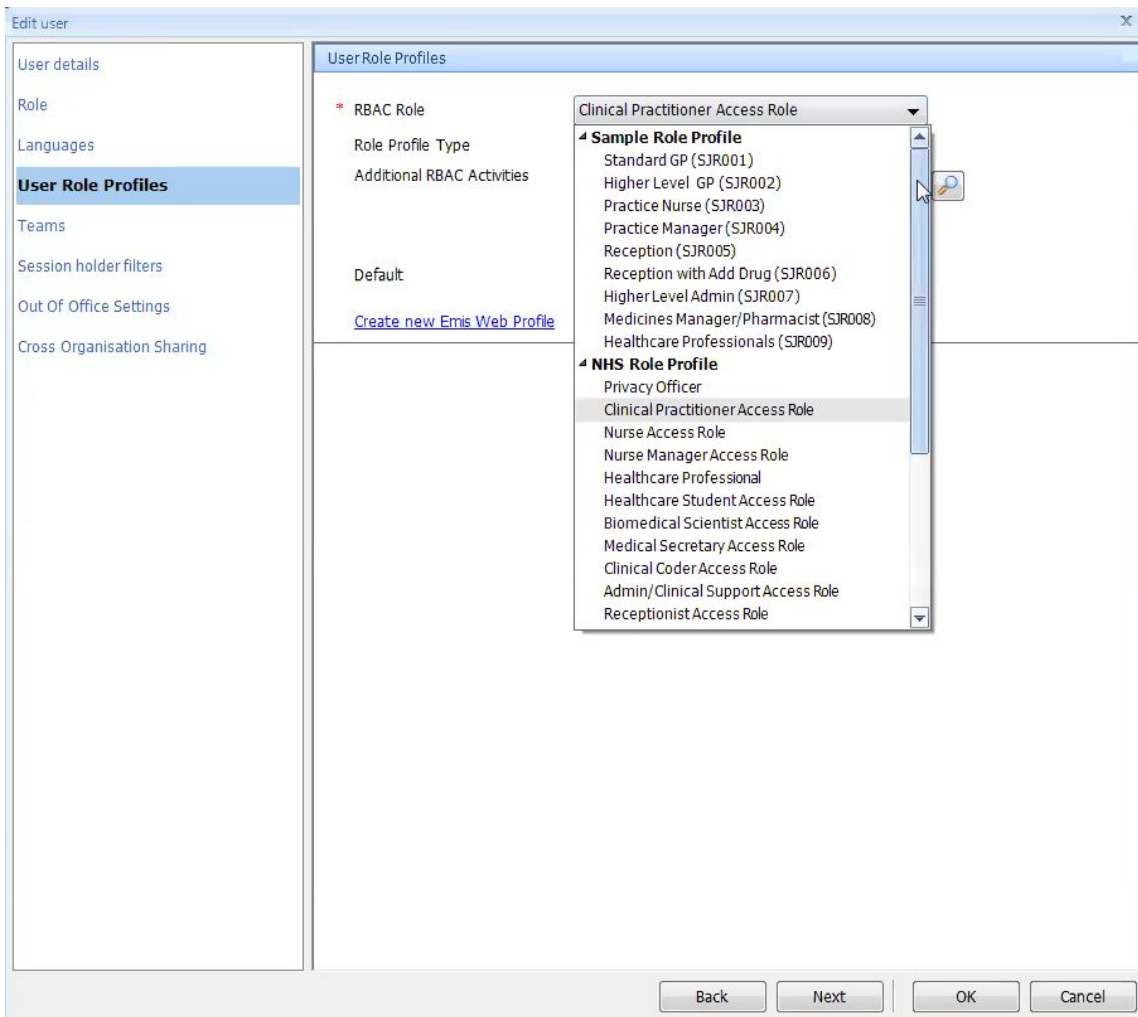
- User details:** Includes fields for 'Role' (set to 'General Medical Practitioner'), 'Appointment Session Holder' (radio buttons for Yes/No, with 'No' selected), 'Patient Facing Services Booking' (set to 'None'), 'Consulter' (radio buttons for Yes/No, with 'Yes' selected), 'User Mnemonic' (text field containing 'emr1234'), 'Authorise Prescriptions' (set to 'None'), 'Permit Medication Issue Warning Override' (radio buttons for Yes/No, with 'No' selected), 'Permit Issuing Drugs with General Alert' (radio buttons for Yes/No, with 'No' selected), 'Stamp User Choice' (set to 'Please select...'), 'Formulary' (set to 'EMIS Standard'), and 'Default Location'.
- Contractual Information:** Includes 'Relationship' (set to 'Associated'), 'Contract Start Date' (text field containing '06-Nov-2018'), and 'Contract End Date' (text field containing 'dd-MMM-yyyy').
- Professional Numbers:** Includes text fields for 'GMC Number', 'Doctor Index Number', 'GMP PPD Code', and 'FP10PCD prescriber code'.

At the bottom of the form, there are buttons for 'Back', 'Next', 'OK', and 'Cancel'.

## 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: Go to EMAS Manager and Select eMR

- a) Menu > System Tools > EMAS Manager
  - b) Select "Partner API" at the bottom left hand side
  - c) Select "eMR" in the Partner API list
  - d) 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 '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%
- g) **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.**

### If adding users at a later time

From within the home screen go to **user management** and

**Add users** – but remember to 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

## Trouble Shooting Guide

### Connection is unsuccessful

If you get the 'Unsuccessful' message some details have not been input correctly. Click on the 'Amend' button and alter any errors.

Things to double check are:

- Your EMIS organisation code
- Organisation password- is it entered correctly into EMAS Manager and EMIS Web
- You have used 'emr emr ' as the new user
- 'Mr emr emr ' has the RBAC role of 'Clinical Practitioner Access Role'

Then click 'check setup' again.

### If still unsuccessful

Log in to EMIS as Mr emr emr to see if eMR is connected,

Login – [emr1234 \(1234 replace with your own EMIS organisation code\)](#)

Password- Use once-only password from the clipboard (which you may have saved)

- Add the EMIS organisation code
- Click Login

Once successfully logged in- use this link to complete the set up

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

Hopefully you are now in.

### You've Timed Out and lost access during the process

If you have 'timed out' this link will take you to where you have left off

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

Log in using your own user details: i.e. your email address and the password you created (in step 1)

If you have any problems, please contact us- we are here to help.

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