



eMR Quick Setup Guide for EMIS Web Users

'Process SARs and Medical Reports in minutes'

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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/>

eMR: support and training completely free to your surgery

Check our website for up to date information www.medi2data.com/contact

1. Create an eMR account

To set up eMR click emr.medi2data.com/onboarding/step-1

1.1. 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:

Clinical System Code is your EMIS code. This should be 1-6 digit number at the top of your EMIS screen.

Central surgery email address: this will be the email that all the medical report instructions will be sent to.

Read and accept T&C's – click on the blue “[here](#)” to read, scroll down to the bottom and click the blue “accept” button.

Accept contact from MediData and click submit.

1.2. Set up your own account

Fill in the details to set up your account.

- Email address – please ensure you use your individual email address for your own login - email address is case sensitive
- Password - please make a note of your password as you will need it to login to eMR.
- 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.

1.3. Add additional Users (optional)

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

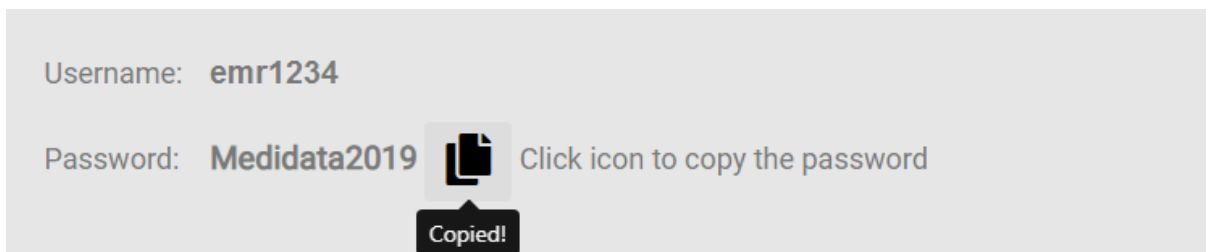
Simply add their names, email addresses and select an appropriate role. You will need a mobile number for them as part of our security protocols- as mentioned above. They will then each be sent an email notification giving them access to eMR.

2. Connect eMR to EMIS Web

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. Some security settings may prevent you from pasting in information. In which case, make a note of this password as you will need it throughout the setup process.

2.1. Create a user in EMIS

First you will need to add a new user

On EMIS Select configuration > Organisation configuration > Add > Add new user

Then input the following:

User Details: all lower case

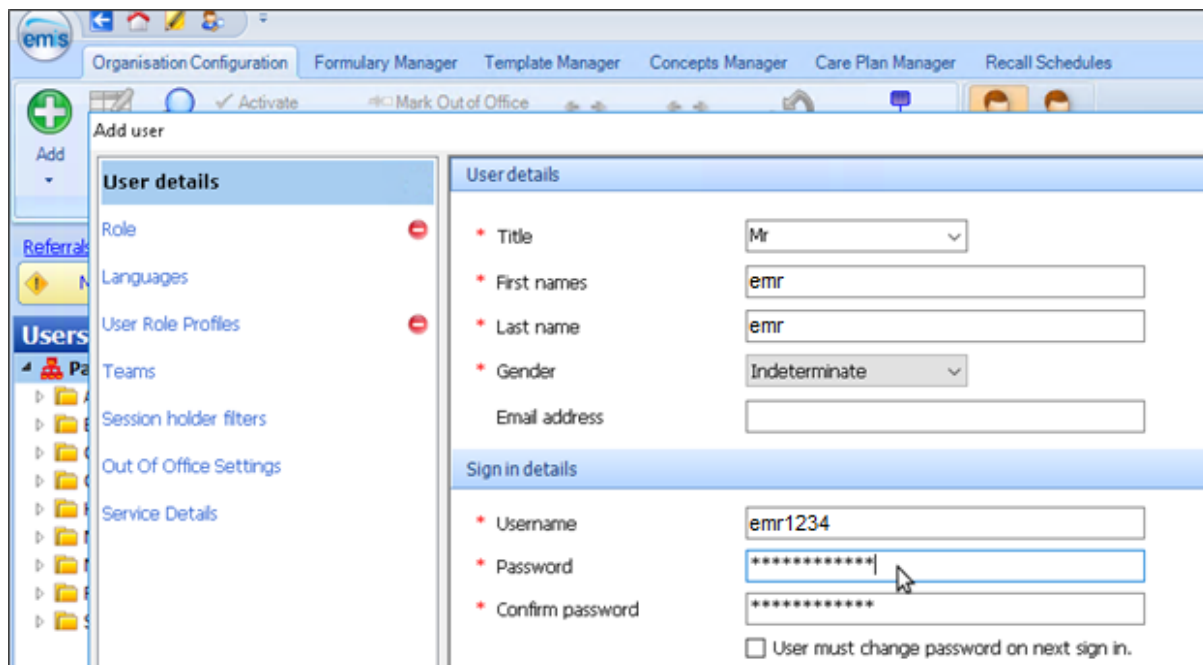
- **Title:** Mr
- **First Name:** emr
- **Surname:** emr
- **Gender-** Indeterminate
- **Email address-** emr@medi2data.com

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

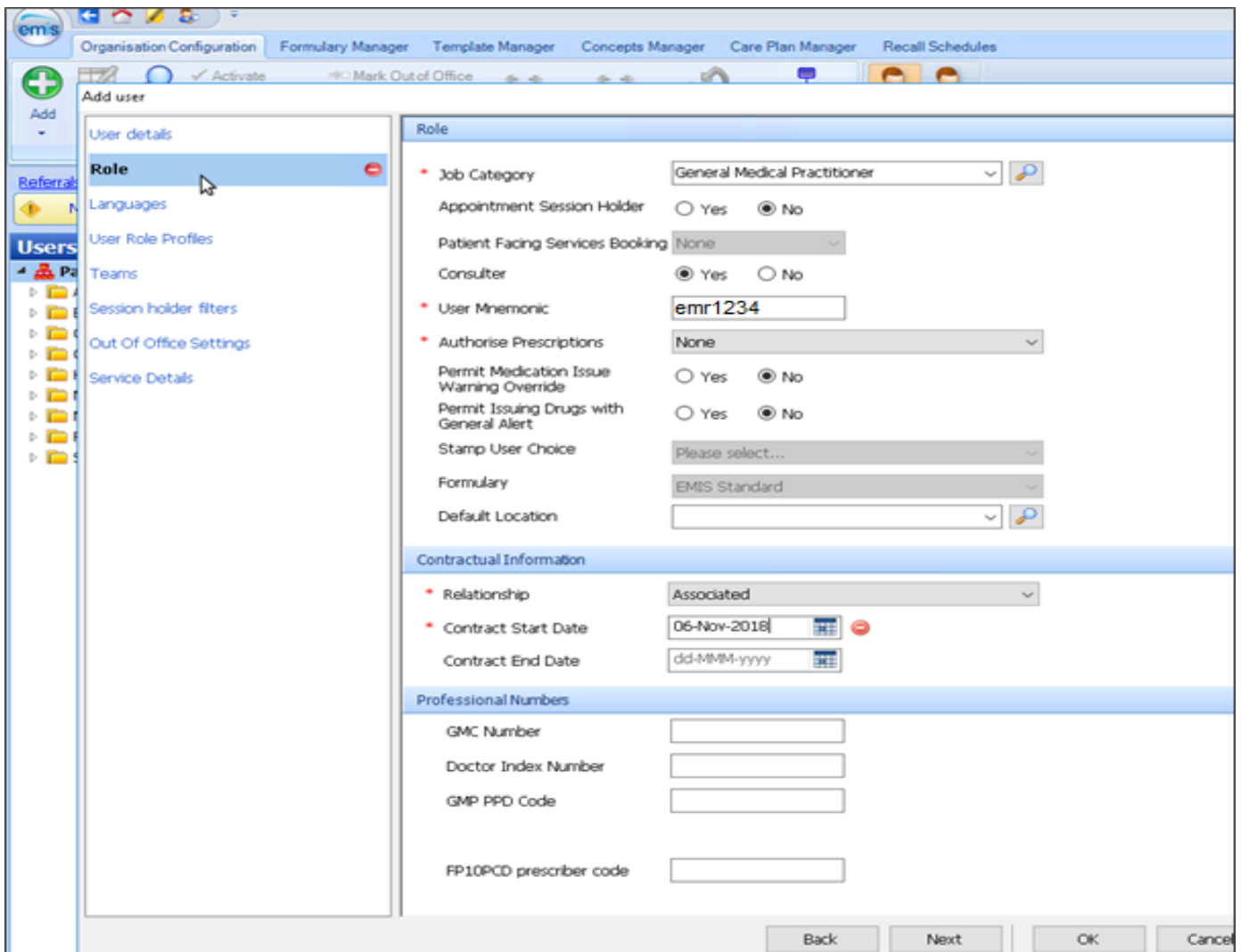
Password: Click "clipboard" icon to copy and right click with the mouse and paste the password into field.



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



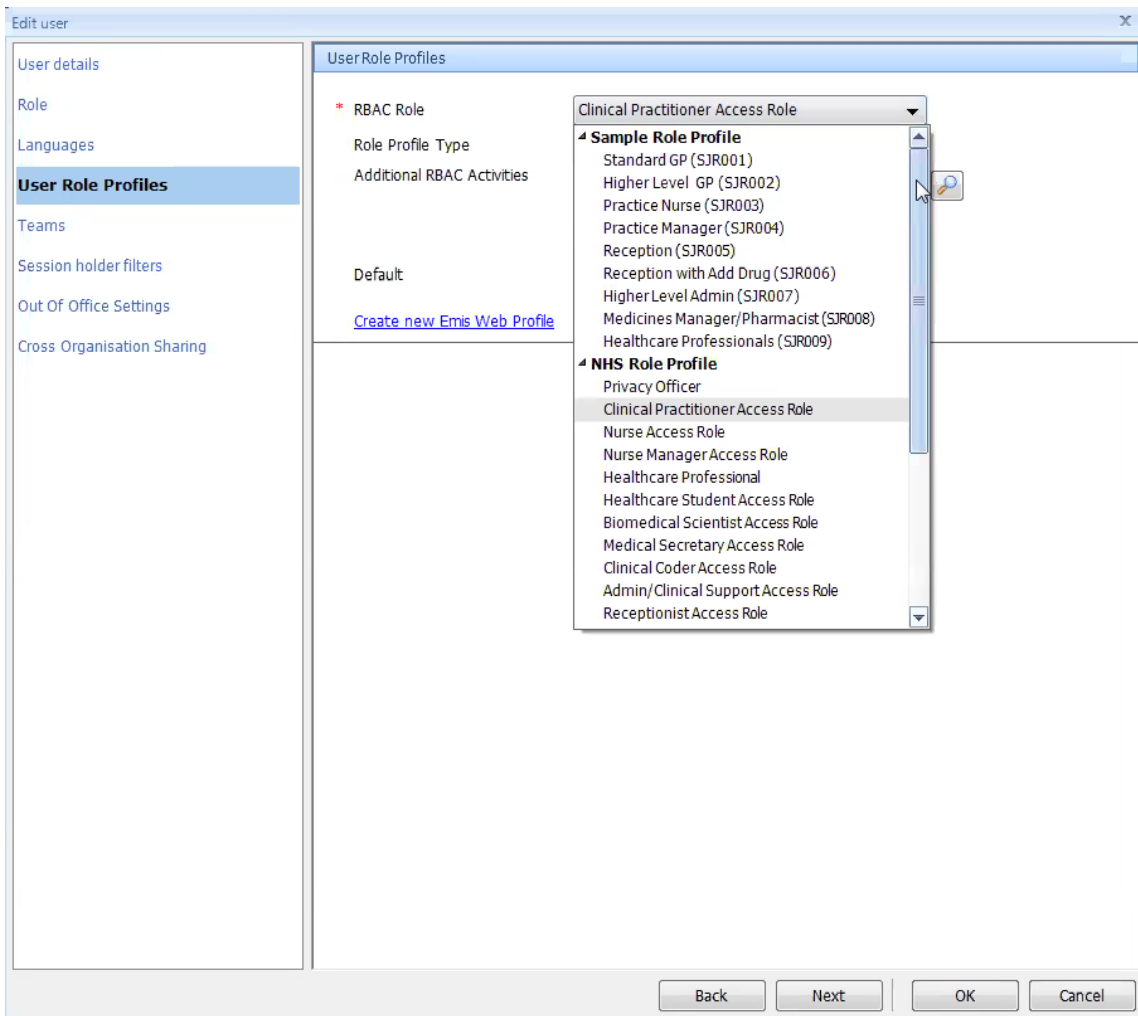
The screenshot shows the 'Add user' dialog box with the following configuration:

Field	Value
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	emr1234
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	

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.



2.2. Enable eMR Partner Application

1. Menu > System Tools > EMAS Manager
 2. Select "Partner API" at the bottom left hand side
 3. Select "**eMR1**" in the Partner API list. If you cannot see the option for "**eMR1**" select "eMR (Medidata Exchange Limited)"
 4. Click "Activate Application" at the top left.
- ✓ eMR will now have a green tick next to it.

2.3. Give permission to eMR to process information

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

- a) Click "**Edit 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 or type 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 to 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.