System One Optimisation

This guide is designed to give System One users a list of modifications that they can make to their System One settings to allow for greater speed and efficiency when using System One.

It is expected that readers of this guide already have a basic understanding of how to use System One in their day-to-day work.

The guide is primarily targeted towards clinical staff although there will likely be useful information contained within that will be helpful to all users of System One.

Some readers will already be familiar with a lot of the information contained within but hopefully everyone will find something to improve their System One experience.

The Toolbar

Making use of the System One toolbar (the bit at the top with all the icons) is vital to using System One in an efficient way. Many of the topics discussed later on in this guide will suggest the use of the toolbar.

If you find yourself accessing a specific part of System One on a regular basis then you should add it to the toolbar.

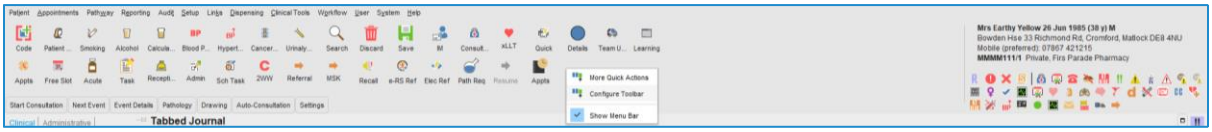
Example

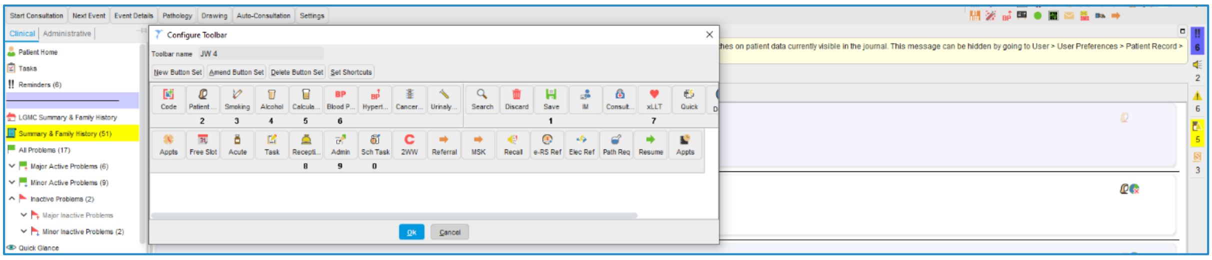
If your default toolbar does not include an icon for setting up a scheduled task, creating a new pathology request or issuing a new med3 then all of these icons and more can be searched for and added to the toolbar.

How To:

All you have to do is right click on the toolbar (the list of icons at the top of the System One screen) and select "Configure Toolbar" and you will be given a range of options to modify it.

When you click on the options "New Button Set" or "Amend Button Set" you can search for any System One function that you want to use.





Task Templates

Do you find yourself often sending the same task, of the same type, to the same colleagues with the same information?

This is where task templates come in to save you time and effort.

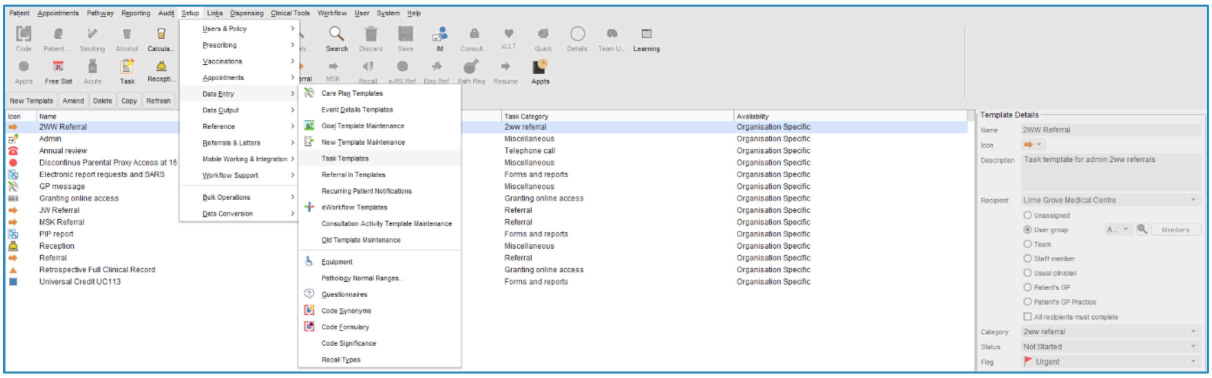
Task templates allow users to create a pre-established set of criteria that will automatically populate a task.

Example

If you send referrals letters via a task you can create a task template complete with the appropriate recipient and any task type and task flag that is required. You can even pre-populate the task template with phrases such as “Dear colleague,” and “Yours sincerely,” so that you do not have to type these out every time you make a referral.

How To:

Click on the “Setup” drop down menu at the top of the screen then select - “Data entry” - “Task Templates” - “New Template”. From here you can specify the criteria that you want to auto-populate your task.



The next time you open up a task to send it you will notice that next to the “Ok” button there is an “Apply Template” button that you can click to apply the desired template.

Remember that anyone can edit task templates so if you want to make one for yourself you should ensure that you make a new task template or copy a pre-exisiting one.

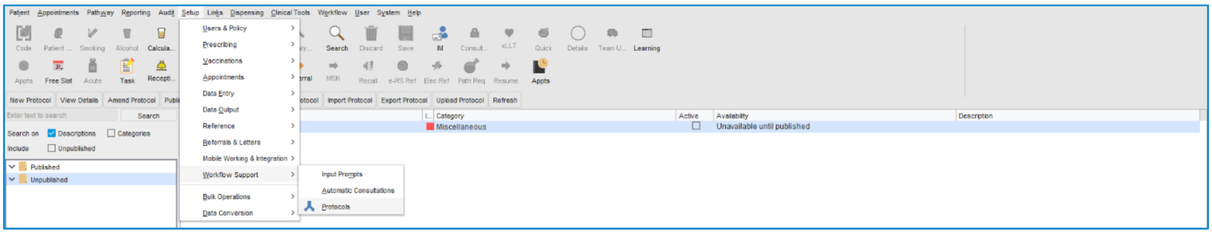
Task templates can be launched from the toolbar (see below).

Protocols

Protocols allow System One users to create a series of steps that can be automatically triggered (such as when opening a specific template) or when selecting a specific icon in System One.

How To:

Click on the “Setup” drop down menu at the top of the screen then - “Workflow Support” - “Protocols” - “New Protocol”.



You can name the protocol, give it an icon and select it to be launched manually in the “Trigger” tab.

In the “Design” tab you can choose what you want the protocol to do from the “Output” section. This might be to select a specific read code for example. You can select multiple outputs if desired. You can then link the “Go” section of the “Start” of the protocol to the other steps in the protocol (see below).

When you are happy with the protocol you can save this and then select it from the “Unpublished” section of the same page where you clicked on the “New Protocol” button and you can then right click the protocol and select “Publish” protocol.

When a protocol launches a pop-up window showing the protocol flow-chart will be displayed. This pop-up can be deactivated (see below).

You can add a protocol to the System One toolbar (see below).

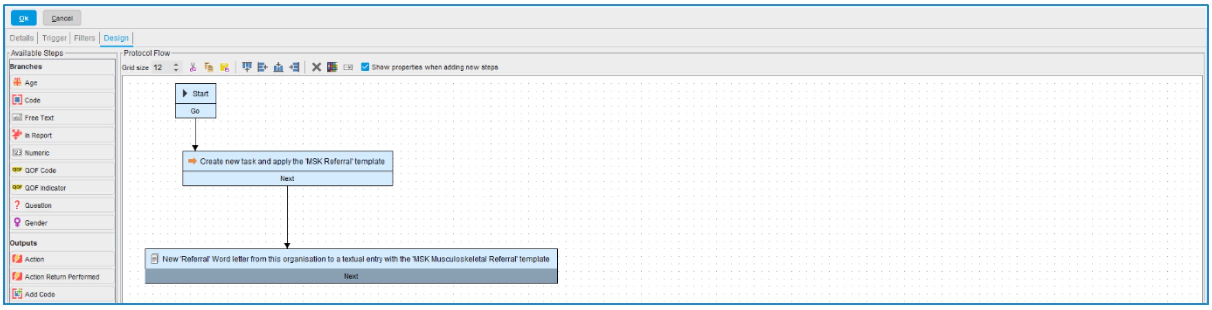
Example

You want to create an icon in the toolbar that sends a task to your admin team and simultaneously opens up a referral letter template to document your referral. This is common for referral forms to physiotherapy/MSK teams.

A protocol can be crated that informs your admin team via a task to send the form and opens up the correct letter template for you to document and save.

In the “Design” tab you would choose the “Action” to be to select “Specific Word letter template with sender, recipient and letter type...” under the “New Letter” dropdown menu.

You can then select another "Action” to “Apply task template” (under the “New Task...” menu) which would allow for a specific task template to be automatically generated to then send to the pre-selected group to inform them that a letter had been generated and was ready to send.



Caution!

If you create a protocol that includes a referral letter it is important that you are sure that the included letter template is up to date. For this reason it is not recommended to create a protocol for 2ww referrals for this situation as if the form or referral process changes you may not be able to ensure that the protocol has been updated.

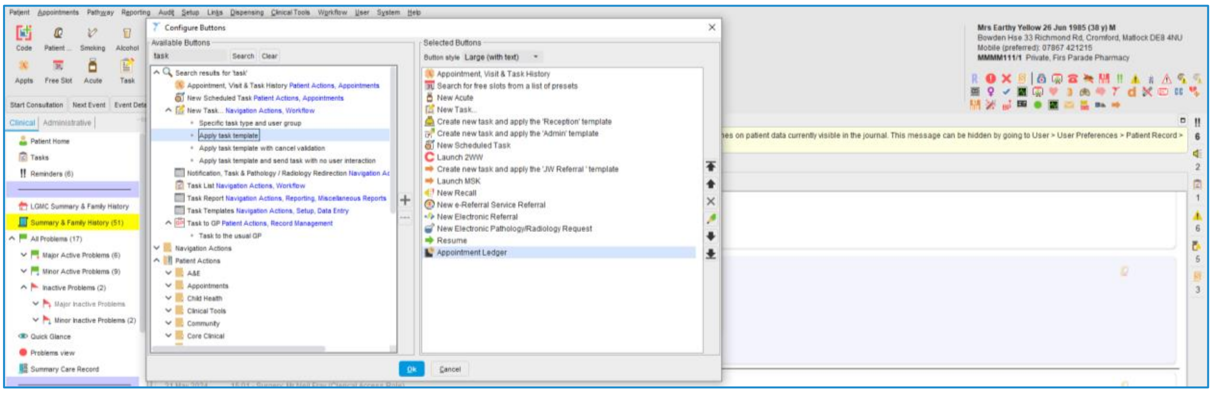
Toolbar Shortcuts

Task Templates

You can a shortcut to open up a specific task template directly to the toolbar. Refer to the above set of steps that you would normally use to add a new icon to the toolbar.

When searching for the appropriate icon under the “Available Buttons” heading, type in the word “task” and his the “Search” button.

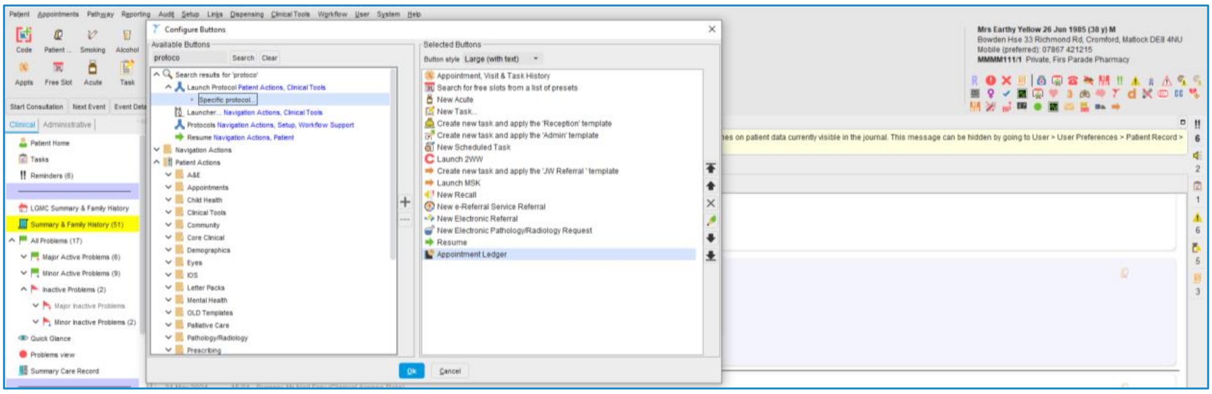
Select “Apply new task template” under the “New Task” heading and double click on this to bring up the list of task templates to apply. When you have selected the one that you want, be sure to alter the name of it to something that makes sense to you (such as “Referral” or “Task Admin”).



Protocols

As mentioned above, you can also add an icon to launch a protocol from the System One toolbar.

Just search the word “protocol” in the “Available Buttons” menu and “Specific protocol...” under the “Launch Protocol” dropdown.



Resume Button

For users of Ardens (a System One add on that provides additional templates and functions) the requirement to cancel or suspect a template in order to access different areas of System One can be frustrating.

A solution to this is to add a toolbar icon that can be selected to allow the user to resume a previously suspended template.

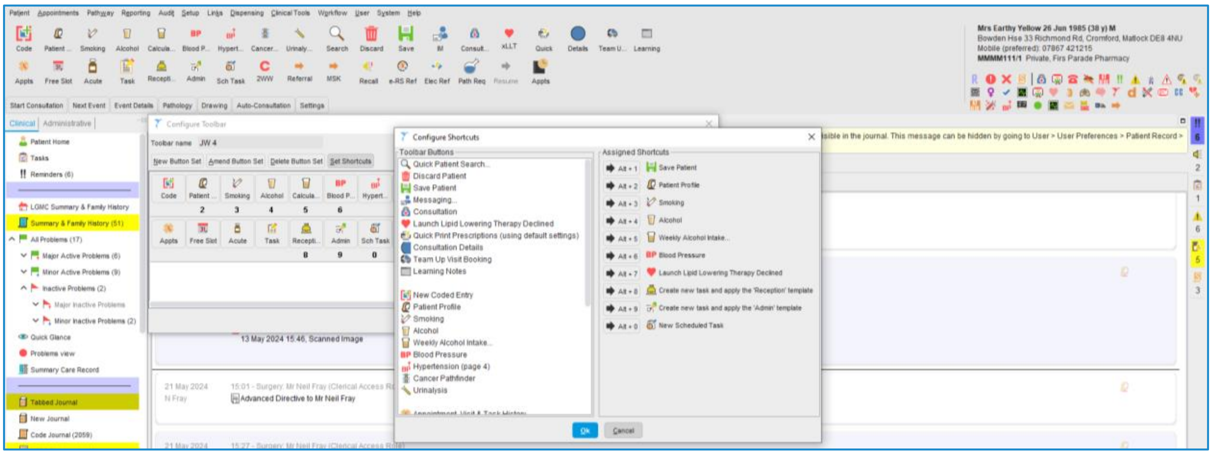
Example

You have opened up the “End of Life and Palliative Care” template but want to look at the patient journal without having to find the template again and re-open it. You can click the “Suspend” box to do this and when you want to open the template back up you can select the “Resume” icon that you have placed in the toolbar.

Shortcuts

You can assign keyboard shortcuts to the icons in the toolbar via the “Configure Toolbar” selection from right clicking on the toolbar.

Try setting the “Save” icon to “Alt+1” so that when you have finished typing in your consult you can easily hit this key combination to save the record immediately.



Tabbed Journal

Making use of the Tabbed Journal in an efficient way can make searching through patient notes a much more pleasant experience.

If you have not already created a custom tab then this is the best place to start.

Show only your own Journal Entries:

This is a useful way of quickly identifying if you have seen a patient previously and what your last entry was.

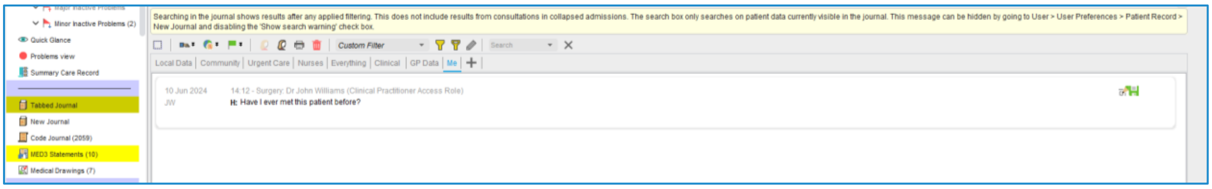
On the tabbed journal click the plus (+) icon and select the check box "Events recorded by specific staff or organisations".

Click the search box and select the "Here" option at the top of the pop-up box to view users in your organisation.

Select your own name from the drop down list.

Before clicking ok to save the tab you will need to name it in the "Tab name" box at the top of the screen. You could call this new tab “Me” for example.

There are a number of other criteria that you can set up depending on what information you want your custom tab to show.



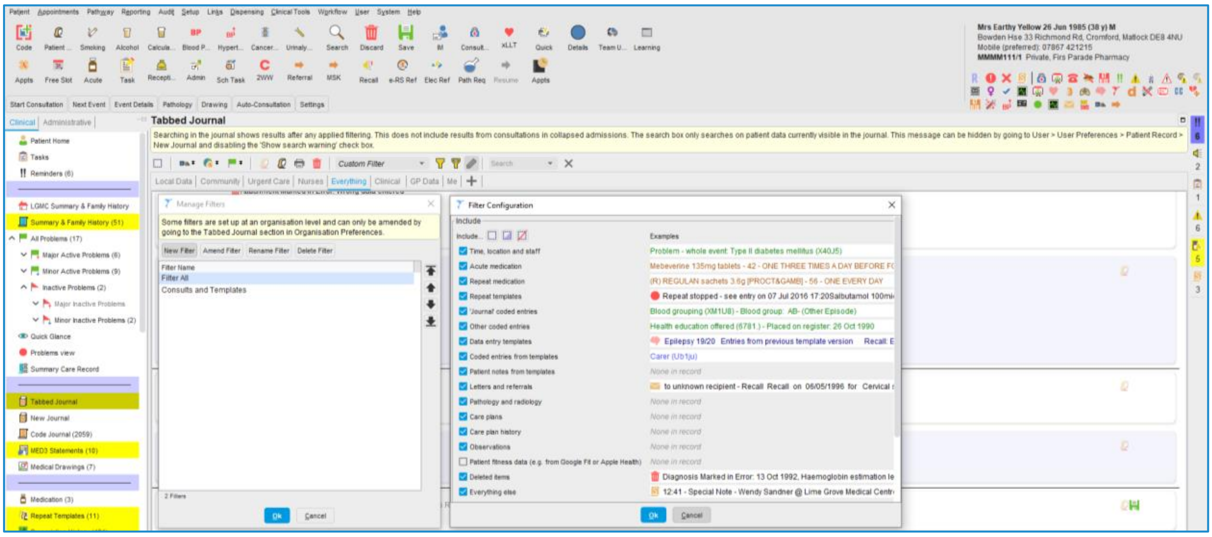
Filter the Journal:

You will notice above the journal tabs there is a box that allows you to select different filters for the journal so that only specific information is shown. This is not dissimilar to creating a custom tab except for the fact that it can allow for more specific information to be filtered.

If you click on the pencil icon next to the filter icons you can create your own custom filter.

Try unchecking every box other than “Time, location and staff” and making this into a new filter. This filter will essentially show everything that has been documented without clogging up the journal with prescriptions, letters, read codes and other distractions. This is useful for quickly seeing what colleagues have documented without having to scroll far back into the notes.

Note that to see documentation from templates you will also need the “Coded entries from templates” box to be selected.



Warning, Pop-ups and Task Dialogues

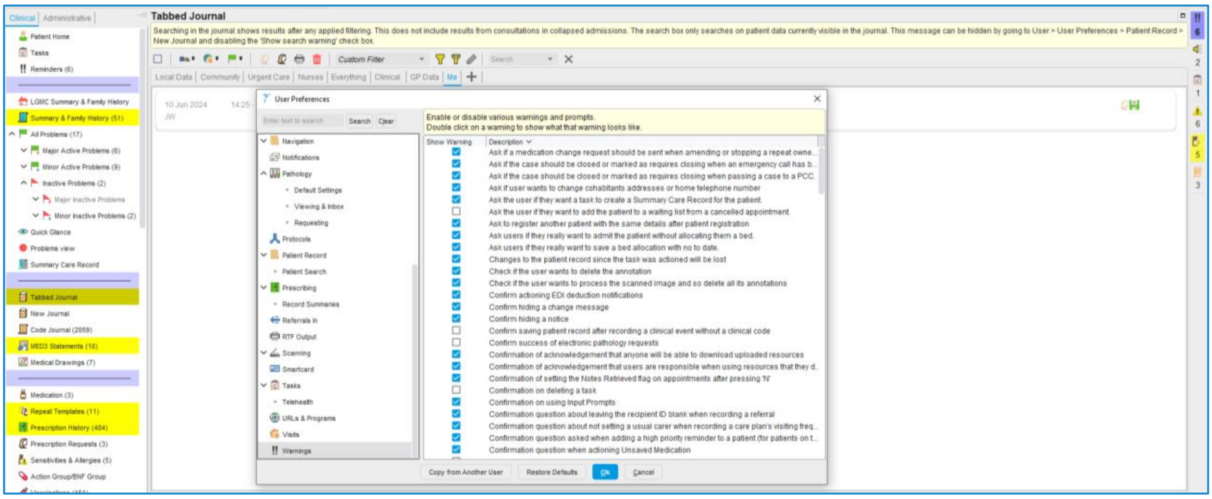
Disable/Enable Warnings

You will notice that as you use System One various actions will trigger messages to appear to confirm an action or warn you of a change to the system. These can be turned off by unticking the appropriate box when the message occurs - “Show message next time”.

These messages can be enabled and disabled in the “Warnings” section in user preferences.

How To:

Go to the “User” drop down menu at the top of the screen then select - “User preferences” - “Warnings” then select the warning check box that is relevant.

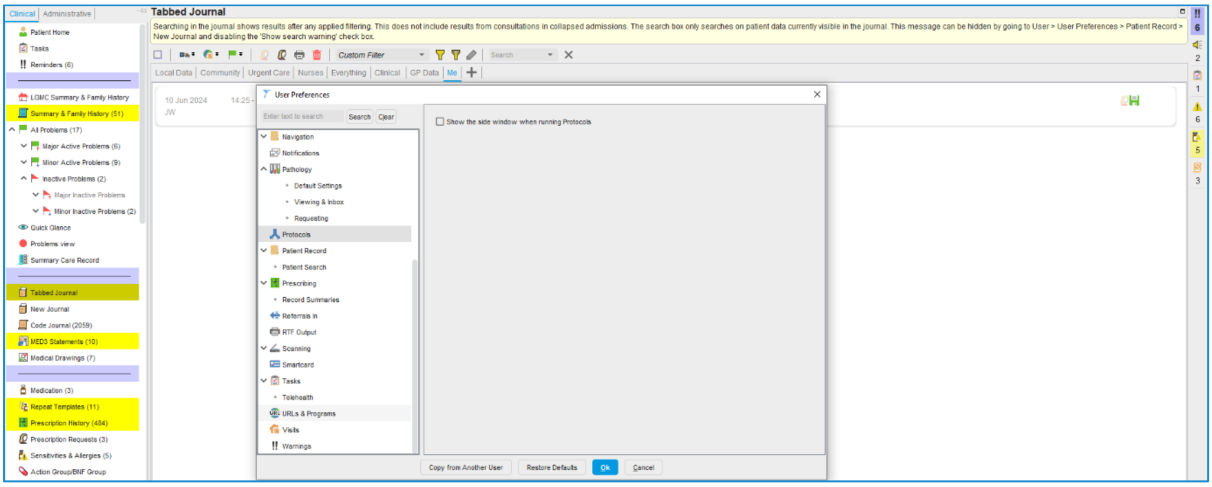


Disable Side Window Pop-up for Protocols

Launching a system one protocol will sometimes lead to an additional window being automatically opened as part of the protocol so that the protocol flow chart can be visualised. While this can be helpful in some situations, the pop-up may be distracting and cause System One to run at a slower speed.

How To:

To deactivate this go to the “User” drop down menu at the top of the screen then select - “User Preferences” – “Protocols” and then uncheck the relevant box.



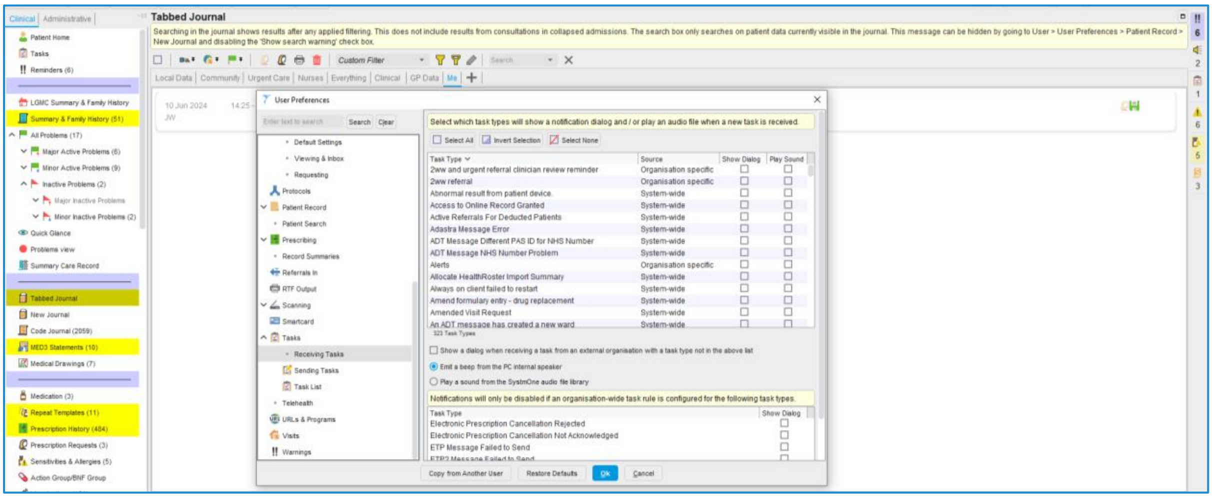
Disable Task Dialogues

Do you get annoying and unnecessary pop-ups when certain task are sent to you that require you to close the pop-up box to continue what you were doing? Sometimes being notified that you have a new task (such as for 2ww referrals) can be useful but for most applications you will not need to be notified about a new task if you are checking your task box on a regular basis.

These dialogues can be deactivated in the User Preferences.

How To:

Go to the “User” drop down menu at the top of the screen then select - “User Preferences” - “Tasks” - “Receiving Tasks” then select the task type and then uncheck the box next to the relevant task type under the headings “Show Dialogue” and “Play Sound”.



Caution!

Certain pop-ups are necessary for safety reasons and your organisation may require that certain task dialogues are required and not disabled for certain task types. If you are unsure if this is the case then you must check with your system administrator before disabling a task dialogue.

Prescribing

Ok & Another

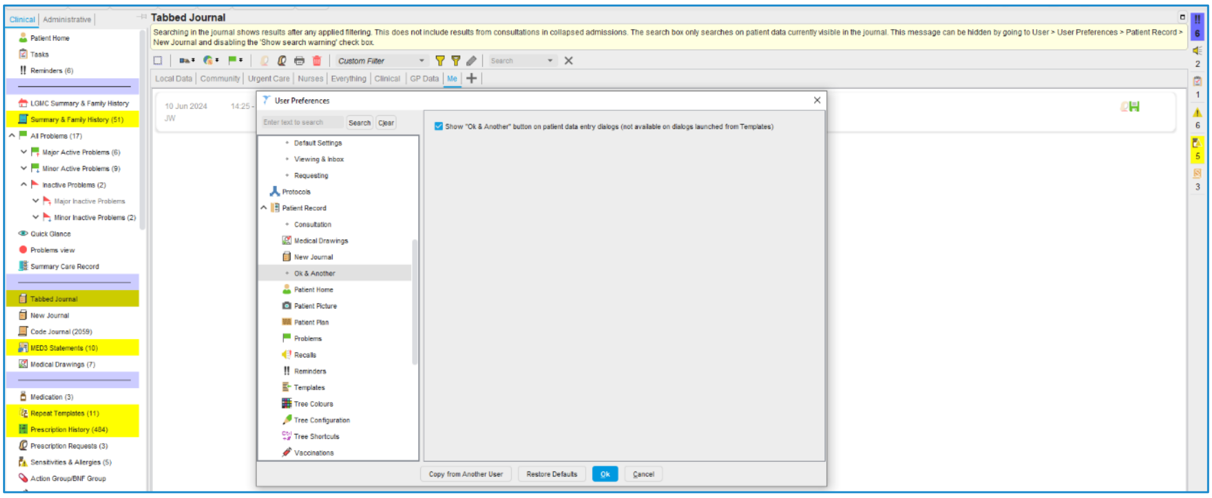
You should make sure that the “Ok & Another” box is activated for when you prescribe medications in System One.

Bizarrely for some users this box is turned off by default even though it is very helpful for prescribing multiple medications.

This setting is also relevant for other "patient date entry dialogs" that you will see in System One.

How To:

Go to the “User” drop down menu at the top of the screen then select - “User Preferences” - “Patient Record” - “Ok & Another” then check the relevant box.



When prescribing a medication, ensuring that the correct box is checked as described above in user preferences will ensure that the “Ok & Another” box is activated for giving the option to immediately open up the medication prescription box again after the first medication is prescribed.

Custom Formulary

You can create your own custom formulary so that the list of options that are presented for the prescription text is presented to you with the exact wording that you would like.

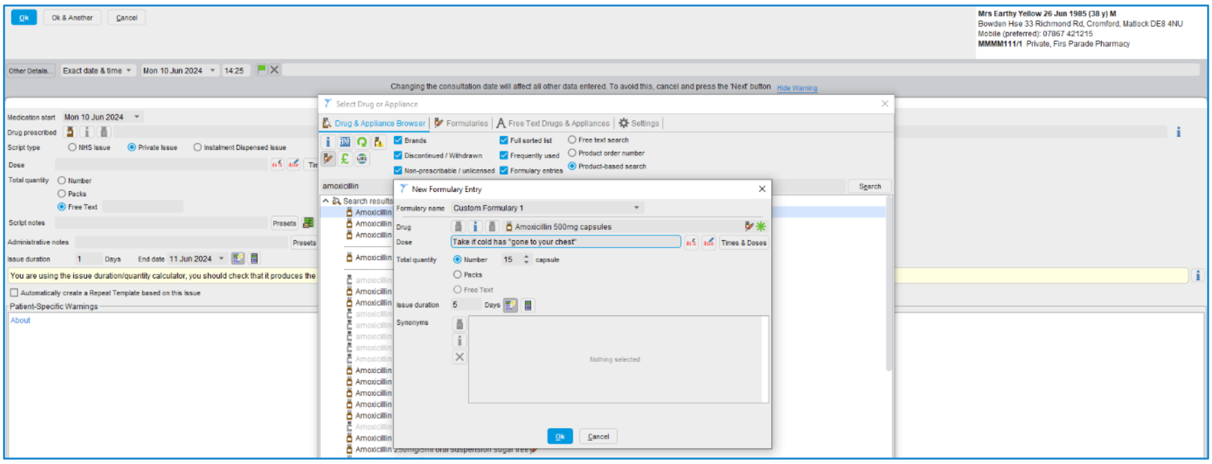
How To:

Go to the “Setup” drop down menu at the top of the screen then select - “Prescribing” - “Drug Formularies”.

You can create a custom formulary – in this case “Custom Formulary 1”. Follow the instructions to add a medication to it (this is the same process as outlined below for further medications that you want to add).

The next time you open up the medication prescription box to record a new medication, find the medication that you want to specify a custom prescription for and click on the icon of the syringe next to the pill bottle. Note that hovering over this icon will display the text “Create drug formulary entry for the selected drug”.

Then select “Custom Formulary” and type in the prescription preset text for the drug. You can also set the quantity supplied.



Click “Ok” and the next time you go to prescribe the drug you will be given the option to use your own custom prescription text.

Caution!

Your custom formulary can be edited and viewed by others in your organisation with the additional prescription suggestions that you create visible when prescribing a new medication. For this reason it is best to discuss with your management team before adding entries to the custom formulary.

Miscellaneous

Search Box

In the lower left-hand corner of System One is the search box that can be used to search for any template, section of a template or System One function.

The search box can be surprisingly underused by some clinicians so it is mentioned in this guide for completeness.

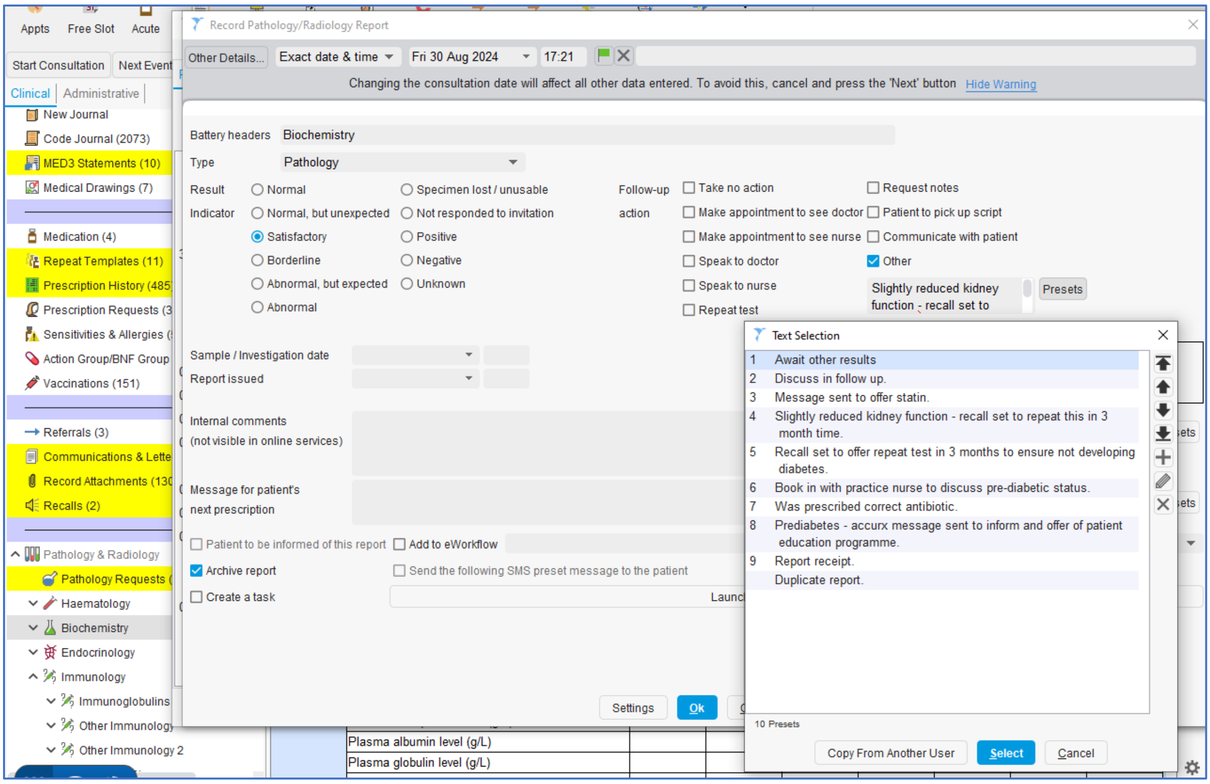
Presets

Ensure that you are making use of “presets” when you are filing results, letters and creating recalls. They can save a great deal of time but many clinicians underuse them.

To use a preset when filing results, select the “Other” option and click on the presets button. From here you can add your own preset comments (or copy another users presets) which will auto-populate the “Other” box and will be visible to the patient in their online record.

Presets can also be created for inputting comments into letters and recalls.

For example, you can create a preset results comment to say “Reduced eGFR, offer repeat test in 3 months” and then a recall preset which will auto-populate to say “Repeat U&E, ?CKD” and set this for 3 months time.



Clinical Tree

The menu on the left hand side of the screen is called the clinical tree for some reason. Right clicking on this menu will open up the "Tree Configuration" option which will allow commonly used sections to be designated a specific colour for easy identification.

You can also set a shortcut to sections that you commonly use or find hard to identify which allows you to hold the "control (ctrl)" key and a specific number key to instantly open the section that you want to go to. For example, if you struggle to locate the med3 section then a shortcut like this can be of real help and you will be able to find the med3 page faster than the patient can say "Sick note".

Learning Notes

The Learning Notes section is a useful place for recording information for your own personal use and learning in a convenient area on System One that is not connected to a patient record.

It can also be useful for storing general notes, numbers and weblinks (although the weblinks are better stored under the "Clinical Tools" drop down menu – see below).

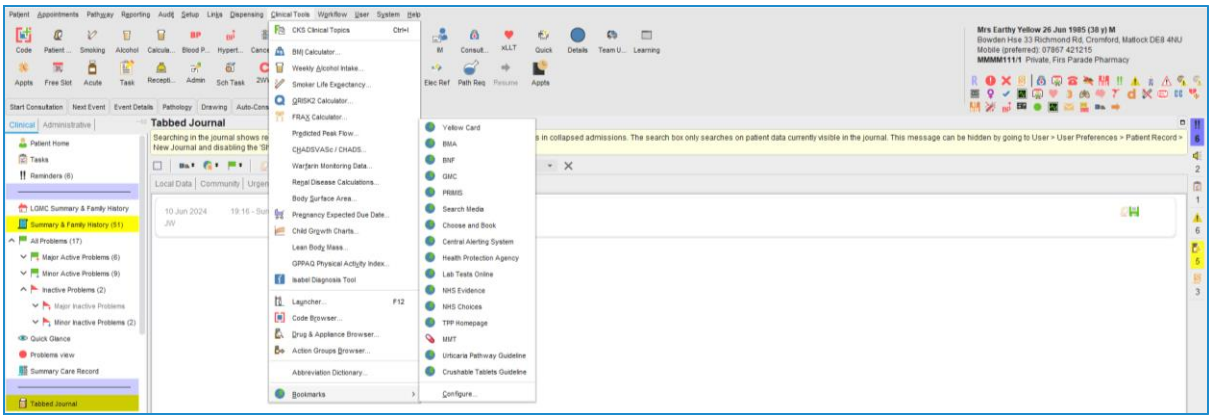
Whilst the learning notes section is useful for documenting learning it should not contain patient specific information as this needs to be protected under GDPR.

How To:

The Learning Notes section is found in the "User" dropdown menu. It may be a good idea to add it to your toolbar so that you remember to use it.

Bookmarks

You can bookmark useful websites in the “Clinical Tools” dropdown menu which will automatically open up the website in your web browser.



Wrap Up

There are many more System One optimisations that are not covered in this guide. The intention behind this is so that the most useful and/or obscure settings are highlighted above whilst leaving more accessible or less relevant settings for the reader to discover for themselves.

Here are some tips for you to further develop your proficiency with System One:

- Your colleagues will no doubt have their own tips and tricks that they use on a daily basis to optimise the use of System One. Ask around to see what people have discovered that works well for them and if you find a useful way of doing things then be sure to share it with others.

- The “User Preferences” section in the “User” dropdown menu is mentioned several times in this guide. It is worth revisiting this section and working down the list of preferences systematically to alter your System One experience to what works best for you. The “PC Settings” section in the “System” dropdown menu allows for further changes to the user experience that may be helpful.

- If you find yourself repeatedly performing the same task or clicking through the same sequence of buttons to achieve the same outcome then ask yourself if there is a way to streamline this process. Can you use a shortcut, task template, protocol or preset to make things faster and easier?

- This guide was heavily inspired by work of Dr Hussian Gandhi on his YouTube channel “eGPlearning” where he has multiple videos that cover the use of System One. It is highly recommended that you take a look at his videos on the topic of System One to supplement the information that is presented in this guide.