What is SystmConnect?

SystmConnect is the total triage and online consultation platform that enables effective online communication between your organisation and patients. Patients are able to navigate to a bespoke online gateway for your healthcare service that allows patients to submit requests directly into your organisation. SystmConnect requests can be initiated online via the SystmConnect website or in person via the SystmConnect requests overview available within SystmOne. SystmConnect has been developed in line with NHS England's Digital Pathways framework, and fully meets the framework requirements.

What organisations can enable SystmConnect?

SystmConnect works with all SystmOne modules, and it can also be used as a standalone solution.

TPP are initially rolling out SystmConnect to GP services.

Working across a PCN/ICB

SystmConnect scales with your organisation, PCN and ICB. Content can be created and managed at a regional level. Reference to cross-organisation features is detailed in appropriate sections throughout this guidance.

Working across branches

If you use Branches within your organisation(s), you can filter and view requests based on patients' 'Usual Branch' (set in *Patient* > *Patient Care*) for requests that have been matched to patients. Requests that are not matched to a patient record will not have a Usual Branch. See 'SystmConnect Requests screen' for more detail.

SystmConnect website

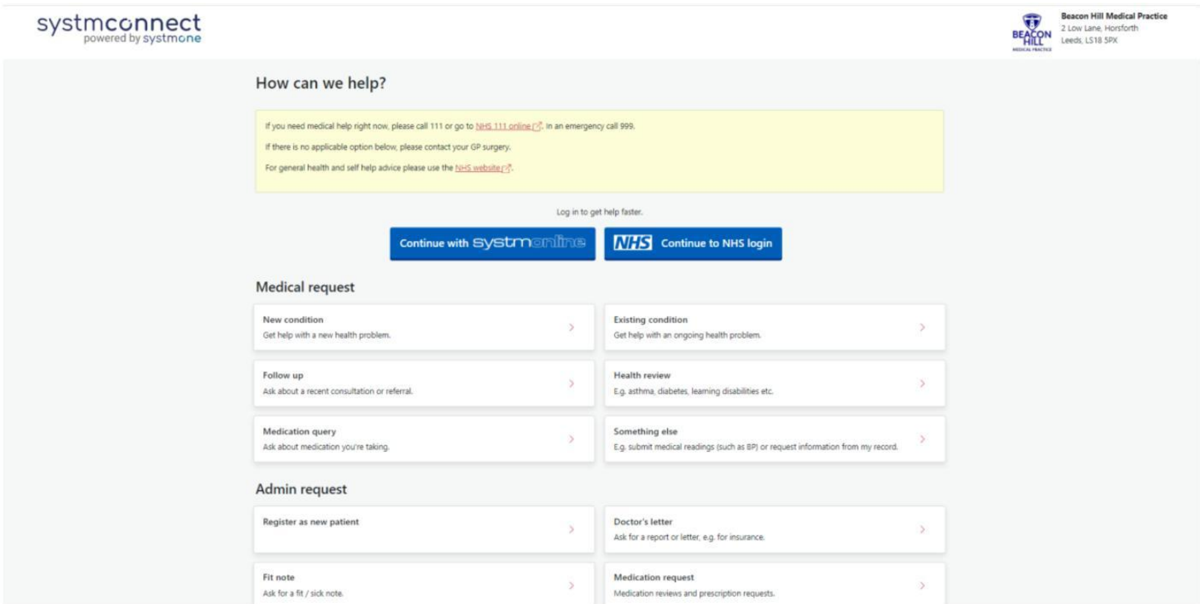

Figure 11: SystmConnect website

In order to access SystmConnect, patients will need to be provided with the unique SystmConnect website address for your organisation. You may also wish to provide a link to the SystmConnect webpage from your organisation website. The SystmConnect URL can be found in the SystmConnect Global Settings node in SystmOne organisation preferences.

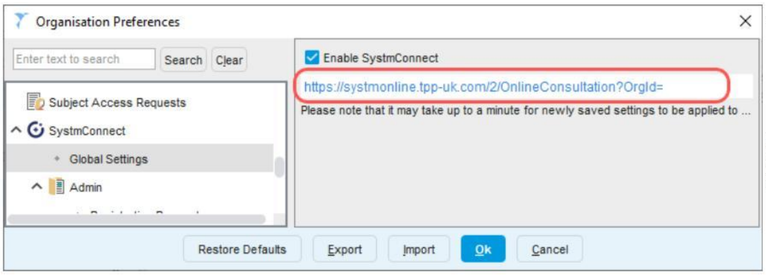

Figure 12: SystmConnect URL in organisation preferences

When a patient navigates to the website they will only see the request types that you have enabled at your organisation.

When a patient selects a request type on the website, e.g. New condition, they will then only see the categories/questionnaires that you have made available e.g. Sleeping problems, Ear problems etc.

The SystmConnect online experience is optimised to work on desktop, tablet and smartphone devices.

Questionnaires

SystmConnect displays a web version of the questionnaires configured in SystmOne. Mandatory fields are denoted with red asterisks next to the question title. The website will prevent questionnaires from being submitted if mandatory questions have not been completed.

Patient/proxy details

After completing any questionnaire, website users are prompted to record the details of who is submitting the SystmConnect request. Requests can be submitted by the patient themselves, a healthcare professional or someone else on the patient's behalf e.g. a relative.

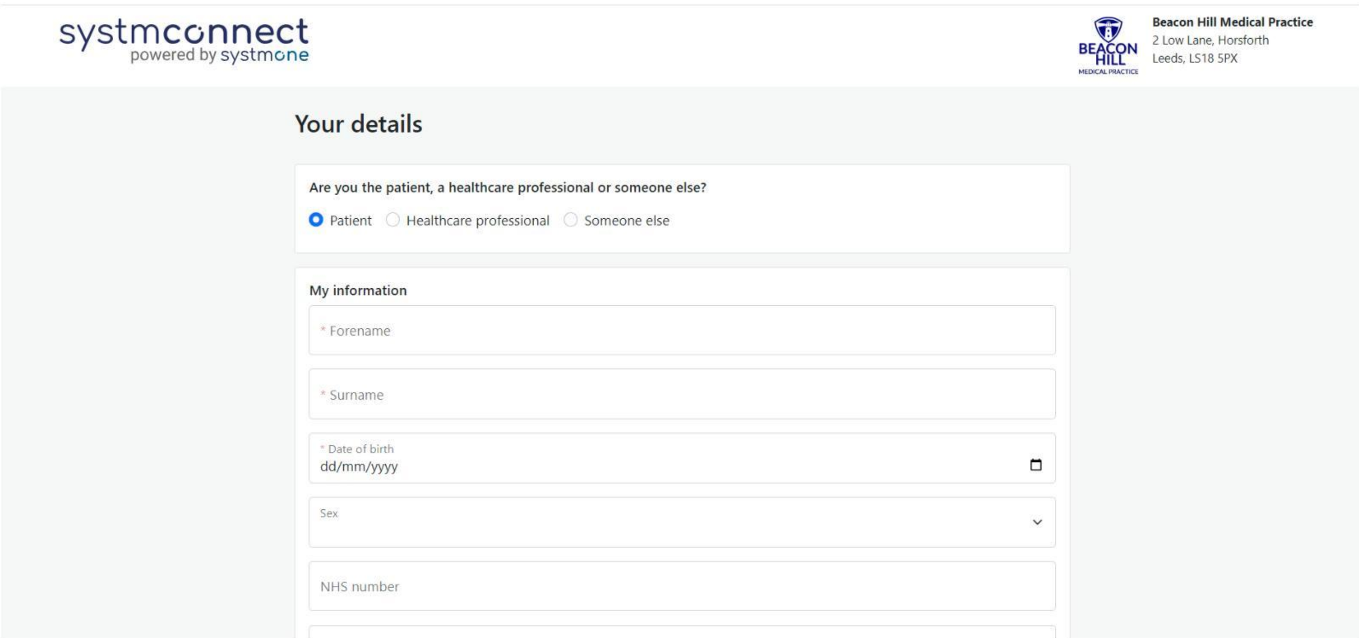

Figure 13: Recording patient details in SystmConnect

Logging in

If a patient has opted to log into SystmConnect using their NHS login, SystmOnline, or Airmid credentials, then patient details will be prepopulated on the submission form.

SystmConnect Requests screen

When a request has been submitted via the SystmConnect website, it will appear on the 'SystmConnect Requests' screen that can be found in the 'Workflow' menu of SystmOne.

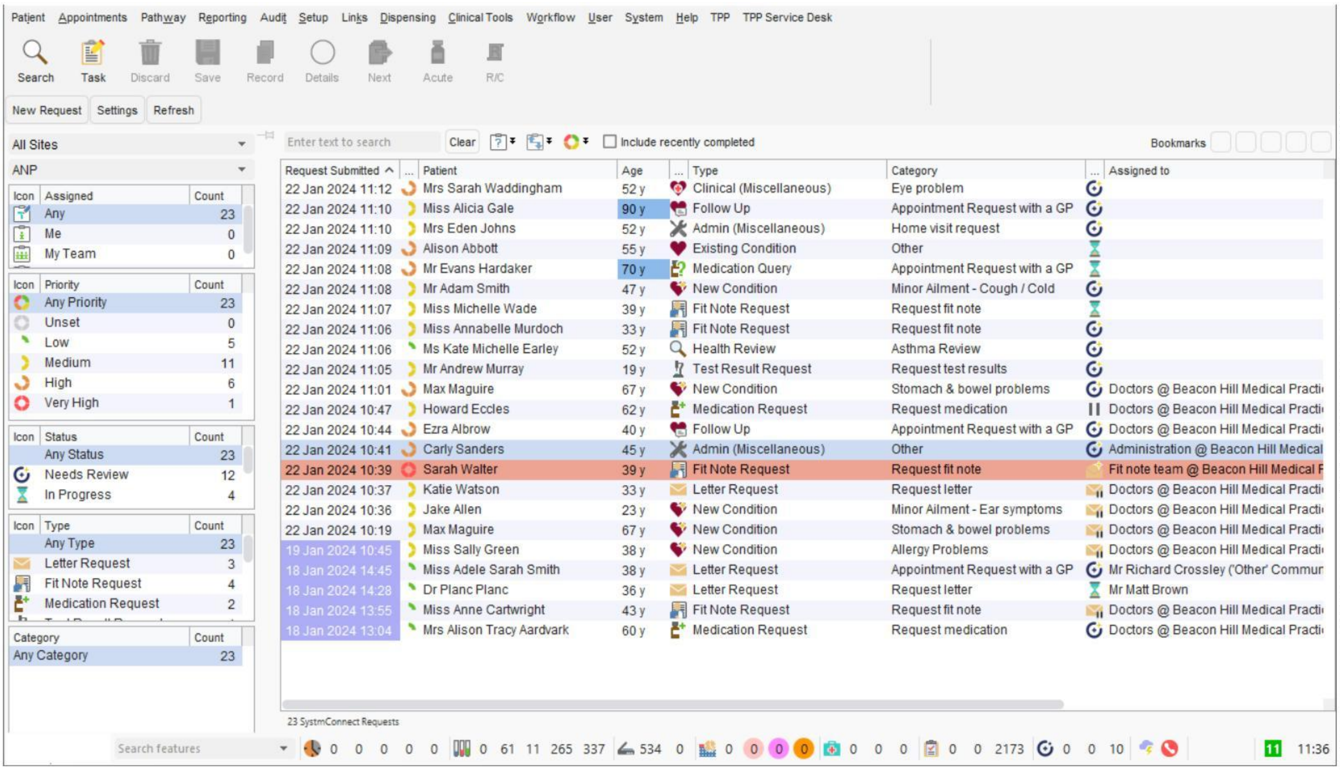

Figure 14: SystmConnect Requests screen

Filters

The screen lists a table of all open SystmConnect requests that have received. To the left of the main table, there are the following filters:

- **Assigned to**
- **Priority**
- **Status**
- **Type**
- **Category** – Category options only become available when a Type has been selected.
- **Site** – This is only available if you are in a shared administration group, and will filter to show requests that have been submitted to that organisation via that organisation's SystmConnect webpage. This will still be the case even if a request has been matched to a patient record at a different organisation to the one that the request was submitted to.
- **Usual Branch** – This displays the branches under the Site that has been selected, and will filter to requests for patients that have that branch set as their Usual Branch in Patient > Patient Care.

Beneath the bookmarks option, there is a checkbox for 'Include recently completed'. When checked, this will include all requests that have been completed in the previous 24 hours.

If your organisation is in a shared administration organisation group, then you can also filter to viewing the requests submitted across the shared admin group, or at a particular organisation within the group, by using the 'Sites' filter in the top left-hand corner of the screen.

Bookmarks

If you would like to save a selection of filters for future use then you can do so by clicking on one of the empty bookmark options in the top right-hand corner of the screen 

. You can then either click that corresponding bookmark or press the keyboard shortcut (e.g. Ctrl + Shift + 1) on the keyboard to apply that filter.

If you select multiple rows in the main table, you can quickly set who requests have been assigned to, their status, and their priority in bulk by clicking on the associated buttons in the top left-hand corner of the table:


When right-clicking on a row in the main table, you will be presented with the following list of options:

- **Open –** This opens the request in a separate window to view/process. Double-clicking the row has the same action.
- **Assign** – Allows you to (re)assign the request to a team or individual staff member.
- **Status** – Allows you to amend the status of the request.
- **Priority** – Allows you to amend the priority of the request.
- **Retrieve patient** – Retrieves the relevant patient record (this is only available if the request has been matched to a patient record).
- **Table** – This includes a submenu of options typical of all tables in SystmOne. However, two additional options are also included.
  - Table > **Configure Columns**

    This allows you to configure which columns display and in which order they are displayed for different staff members, teams or across the entire organisation.

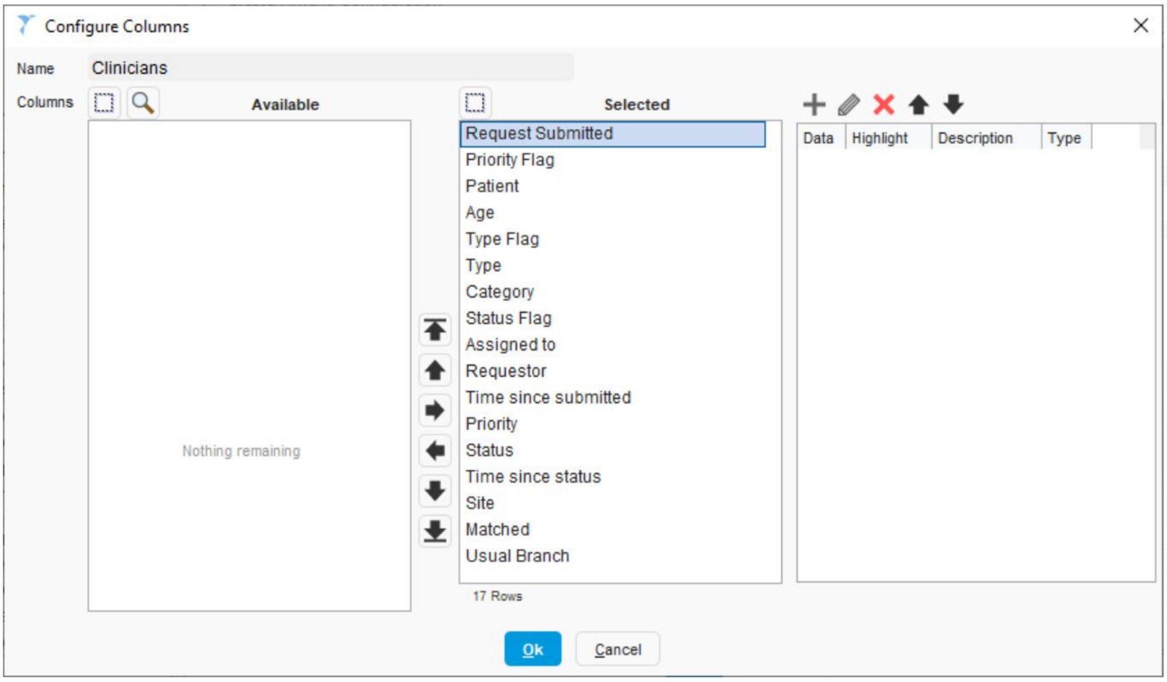

Figure 15: Configure columns dialog

  - Table > **Configure Highlights**

    This allows you to highlight rows or cells in the table based on their content e.g. you may want a row in the table to have a red background if the request has not been processed 24 hours since receipt.

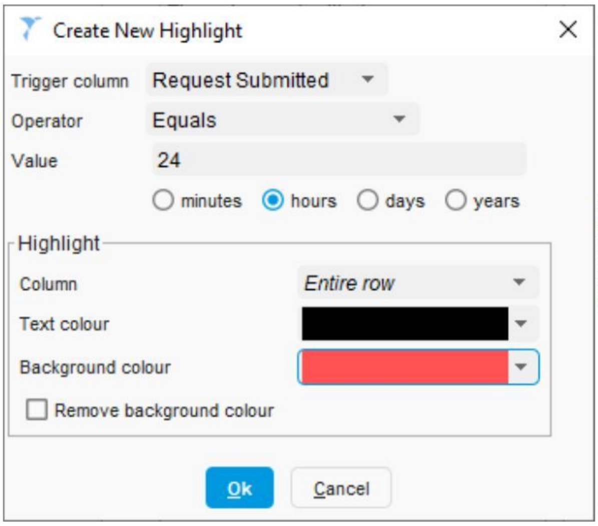

Figure 16: Configure highlights dialog

New request (Total Triage)

The 'New request' button (visible in the top left-hand corner of the screen) should be used if your organisation operates a Total Triage model.

This allows a patient to be triaged via the SystmConnect workflow within SystmOne, for example when a patient has presented in person at your organisation or you are triaging the case over the phone.

After 'New Case' is selected, you are prompted to search for the patient. With the patient selected, you are then prompted to record the SystmConnect Type followed by the Category.

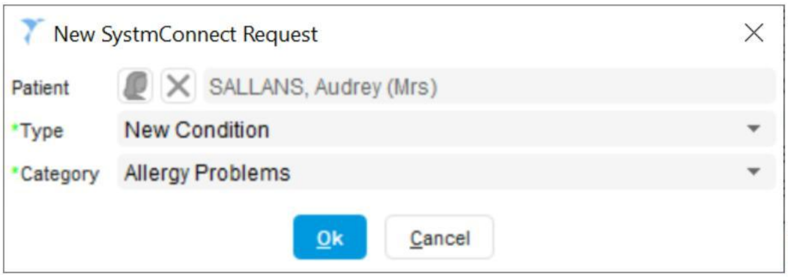

Figure 17: New SystmConnect Request dialog

When you have pressed 'Ok' on this dialog, you will be presented with the questionnaire associated with that SystmConnect type. When completed, this request will be added to the SystmConnect requests screen, alongside any requests generated by patients online.

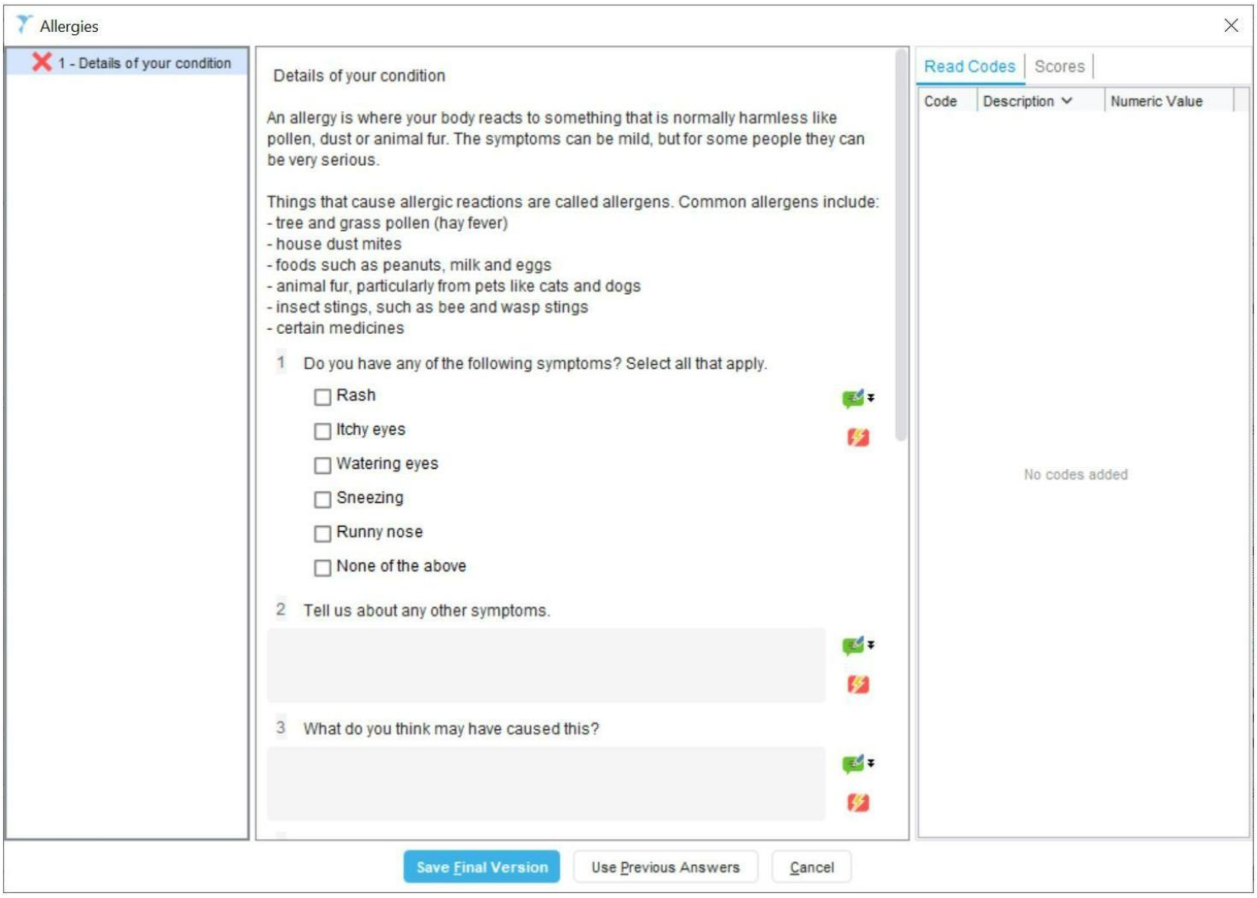

Figure 18: Completing a SystmConnect questionnaire via the 'New request' button

Processing a request

To process a request, either right-click on a row in the main table and select 'Open' or alternatively, double-click on the selected row.

When a request is opened, the 'SystmConnect request' dialog is displayed. This shows the patient's demographics in the header, above the main panel that displays the chronological narrative of the request.

Icons below the demographics describe the current triage status of the request.

To view the details of the questionnaire submitted, click 'View Questionnaire' at the top of this main panel.

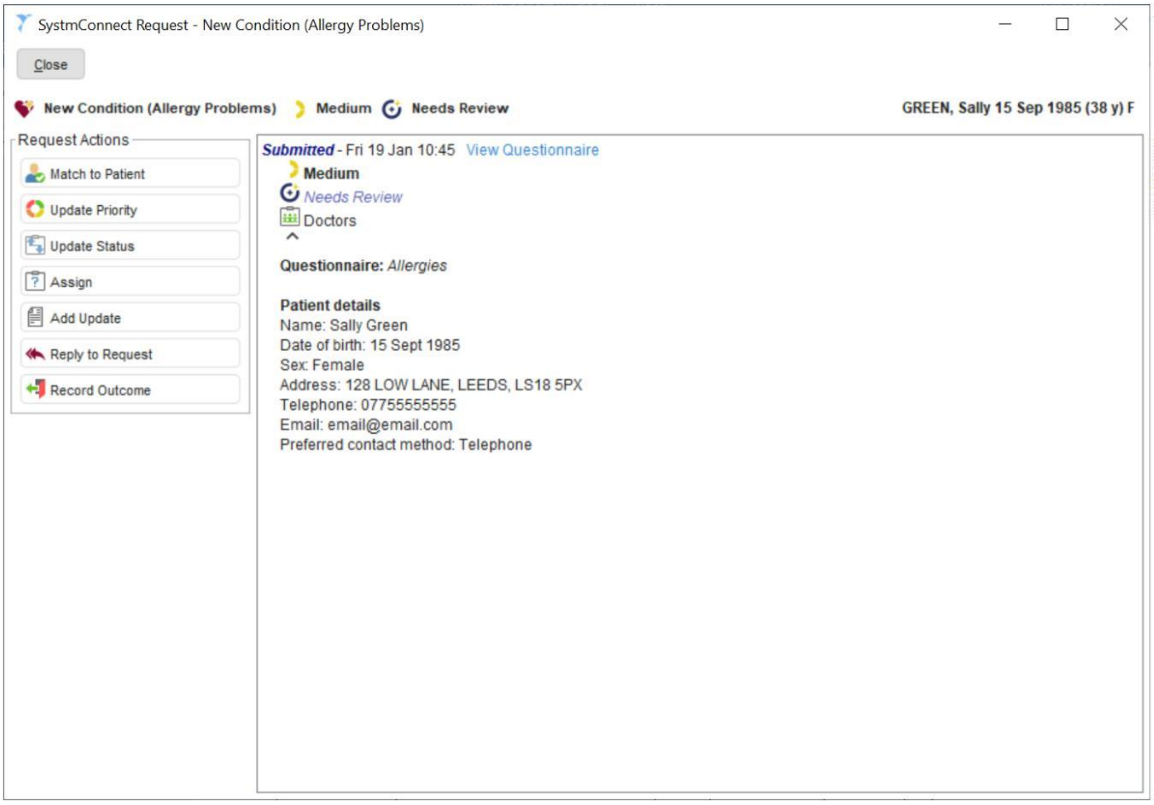

Figure 19: SystmConnect request dialog for an unmatched patient

Matching to a patient record

When the SystmConnect request arrives, the system will use the patient details provided to attempt a match to a patient record registered at your organisation. If this has not been possible, you can manually match to a patient record on SystmOne.

To match manually, click 'Match to patient' and SystmOne will suggest the most likely patient to match the request to from the local patient index for your organisation. When a request has been successfully matched, an additional list of 'Patient Record Actions' will become available in the left-hand action list menu.

If a patient is manually **unmatched** from a request, any data linked to the request will be marked in error in the previously-matched patient's record. The request will retain any request-specific information, such as communications, updates, completed questionnaires, submitted patient details, and events. These will then be linked to the new patient if the request is rematched.

If a patient is manually unmatched **AFTER "Record Outcome"**, you can delete the recorded outcome from the event list and then unmatch from a request.

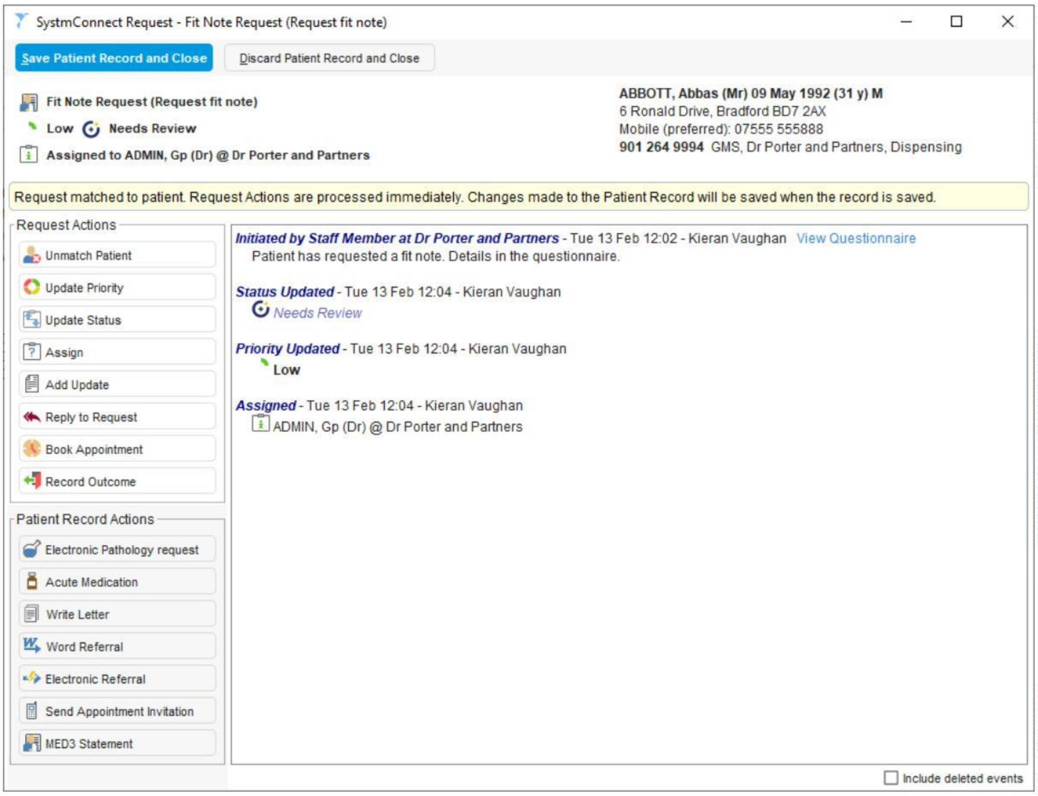

Figure 20: SystmConnect request dialog for a matched patient

Viewing and filing the questionnaire

To view the details that the patient provided online, you can click on the View Questionnaire option. You have the option to add the questionnaire to the patient record (where the request has been linked to a record) by clicking on the File to Record option.

You can set a preference (Setup > Users & Policy > Organisation Preferences > SystmConnect > Global Settings) which will prompt you to file the questionnaire to the record if you have not already done so, when recording the outcome of the request.

Replying to a request

To reply to a request, press the 

button in the left-hand tree.

This will launch the Reply to Request dialog, which uses the Communications Annexe. This allows you to send an SMS or Email back to the patient and also allows you to send questionnaires to the patient or request additional information from they e.g. a photograph for a skin condition.

For further detail on how to use SystmOne's Communication Annexe, refer to *Help > Support & FAQs > Documents & Training Guides > Communications Annexe User Guide.*

The contact details that are shown depend on whether the request was submitted by a patient/their proxy online, or if it was created from within SystmOne by a staff member using Total Triage. If the request was created online, the contact details are those that were entered by the user on the website and will be labelled as such; if the request was created in SystmOne by a staff member, the contact details will be taken from the SystmOne patient record.

If you have allowed a patient to reply to a message that has originated from a SystmConnect request, that reply will be received on the SystmConnect screen (as opposed to the SystmOne Tasks screen).

To see the details of communications between the organisation and the patient you can access the Digital Comms Audit patient record node. This shows the details of the following types of communications:

- SMS message
- E-mail

- Patient Reply
- SystmConnect Request
- Unmatched Communication

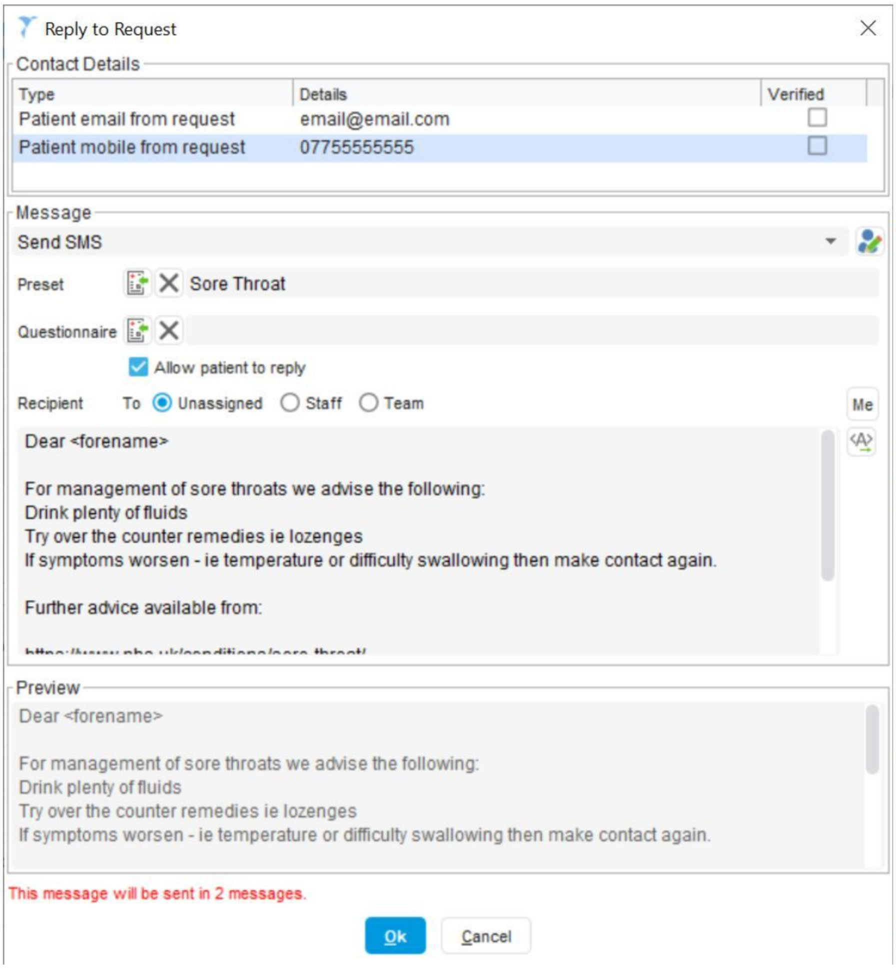

Figure 21: SystmConnect request dialog for a matched patient

Patient record

When a request is matched to a patient record, the record will open whenever the request is opened.

To make processing requests quick and easy, the patient record will open on the node that is the most useful for that request type:

- **Request Letter** - Focus on Communications & Letters node
- **Request Fit Note** - Focus on eMed3 Statements node
- **Request Medication** - Focus on Medication node
- **Request Test Result** - Focus on Pathology & Radiology node
- **New Condition** - Focus on Tabbed Journal node
- **Medication Query** - Focus on Medication node
- **Follow Up** - Focus on Tabbed Journal node

SystmConnect actions

When processing a SystmConnect request, you will be able to use the various actions to the left of the SystmConnect Request dialog. These fall into two groups:

- **Request Actions** – These are available for all SystmConnect requests, and are saved immediately (i.e. do not require the patient record to be saved). The available actions are:

- **Match/Unmatch Patient** - Where the system has not been able to automatically match to a patient record you can search for and match to a registered patient record. If the record has been matched, use this button to unmatch from the patient record.
- **Update Priority** - Set the priority to be unset, Low, Medium, High or Very high.
- **Update Status** - Change the current status of the Online Consultation
- **Assign** - Allocate the Online Consultation to an individual staff member or team.
- **Add Update** - Add a note to the online consultation.
- **Reply to request** - Launches the Communications Annexe providing the ability to message patients via SMS or e-mail.
- **Record Outcome** - Once the online consultation has been dealt with, record the outcome to close the online consultation and remove them from the screen.

- **Patient Record Actions** - These are available only for SystmConnect requests that are matched to a patient record in SystmOne. These are only saved when the patient record has been saved.

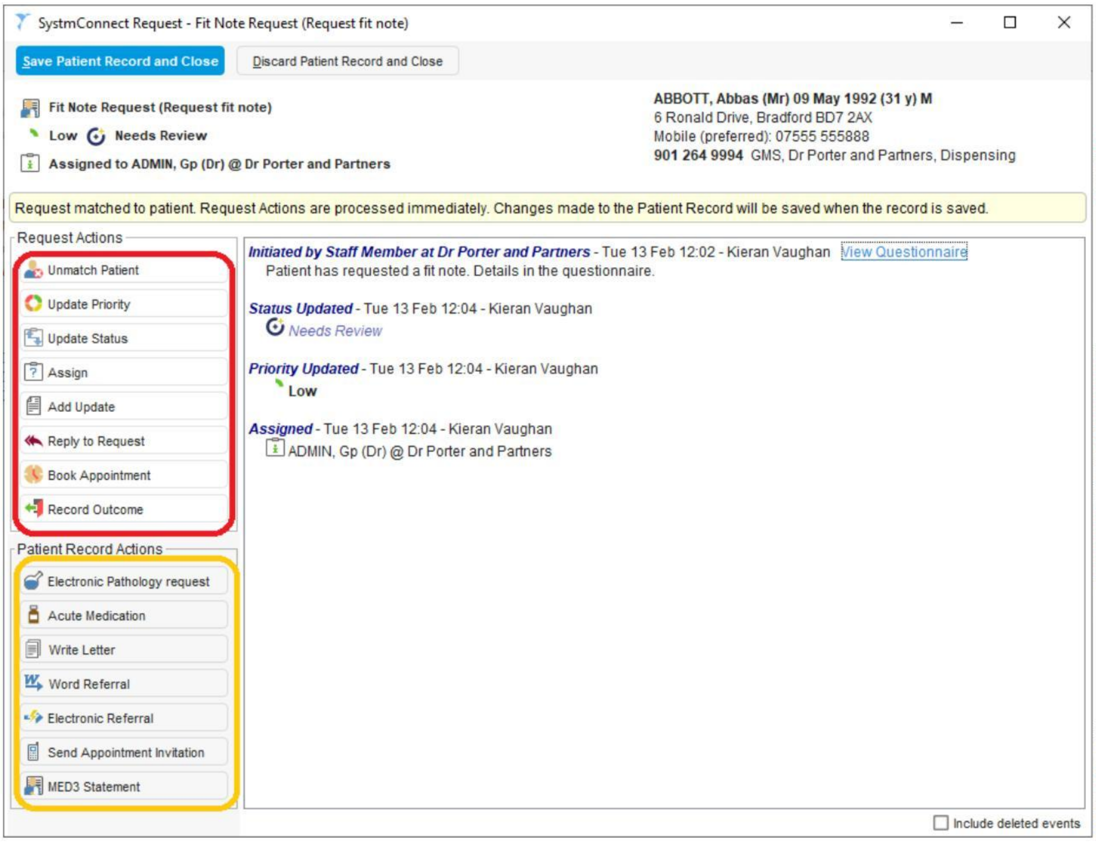

Figure 22: SystmConnect request actions

Recording an outcome

To remove a request from the SystmConnect Requests screen, an outcome must be recorded. This is done using the Record Outcome button that is available when processing a request.

SystmConnect counter

With SystmConnect enabled, a new set of counters specific to SystmConnect requests are made visible at the bottom of the SystmOne window, next to Appointments and Task counters. The numbers are as follows

- Referred to me
- Referred to my team
- Referred to my organisation

Figure 23: SystmConnect counter

SystmConnect information in the record

When requests have been matched to a patient record, information will automatically be added to the Journal when the request is updated.

There is a SystmConnect Requests node that you can add to the clinical tree and this will allow you to quickly see a list of previously submitted SystmConnect Requests for the retrieved patient.

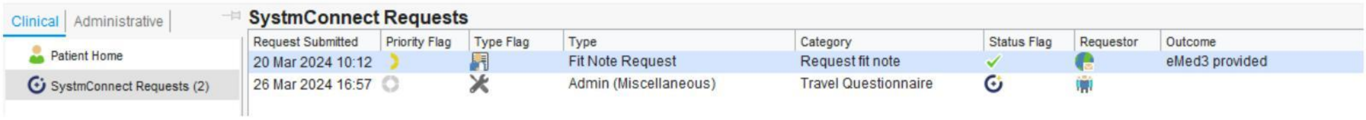

Figure 24: SystmConnect Request node in the patient record