

New User application to the OCS

Authoriser Guidance

NOTE: For any issues or queries regarding the online form, please contact: oxfordshire.caresummary@nhs.net

Included in this document:

- **Authoriser user guidance**
- **Authoriser process flow (Appendix A)**

Authorisers will receive an automated email advising there are applications and include key information about the applicant including: name, job role and email address.

1. Click on the **here** hyperlink to be taken to the Oxfordshire Care Summary login page

From: SignUp OCS (NHS CENTRAL SOUTHERN COMMISSIONING SUPPORT UNIT)
Sent: 13 May 2015 14:15
To: Atyeo Laura (NHS CENTRAL SOUTHERN COMMISSIONING SUPPORT UNIT)
Subject: Sent by Oxfordshire Care Summary regarding a new user sign-up request

You have a new user application to approve, details as follows:

- Name: Todd Davidson
- Job role: Consultant
- Email: todddavidson@nhs.net

Please click [here](#) to access the approval page, or log in the Oxfordshire Care Summary and go to the 'Manage new user signup / update requests' page.

2. After logging in, select **Manage New User Sign Up/Update** requests hyperlink

User's Name:	OxCS Maggie	Users are reminded that their actions are logged and that they should be careful when dealing with patients with whom they have a legitimate clinical/professional relationship. NHS Confidential: Personal Data about a patient
Previous Log-in:	First Login	
Failed Log-ins:	0	
Find Patient		
Manage New User Sign Up / Update Requests		

3. Click on **Action**

Manage new user sign up / update requests

Current filter settings (click 'Filter' button to update settings)

Request Status: Active Requests Only (default) Request Type: All Request Types (default) Requests Order By: Request Date (default)

Approver (line manager) new user / update existing user requests assigned to your user						
Type	Name	Email	Telephone	Request Date	Status	Action
There are no new user / update existing user requests currently assigned to your user in the role of Approver.						
Authoriser (Caldicott Guardian/department manager) new user / update existing user requests assigned to your user						
Type	Name	Email	Telephone	Request Date	Status	Action
New	Todd Davidson	todddavidson@nhs.net	07557456793	13 May 2015 14:15	Approver_Approved	Action

4. Review the applicant details and select the most appropriate action including:

- **Approve**
- **Reject**
- **Cancel** (NOTE: selecting Cancel returns you to the previous screen)

PLEASE NOTE: Authorisers are accountable for their decisions. In the event of an incident or a user inappropriately accessing a patient record, the Authoriser will be consulted about the incident and the individual in question.

Approve Reject Cancel

New user sign up request approval

New user

Please review the new user sign-up / edit user request details and approve/reject the request by selecting the appropriate option above.

Title	Mr	Forename	Todd
Surname	Davidson	Preferred name	
Date of birth	06 Sep 1968	Gender	Male
Email address	todddavidson@nhs.net	Telephone	
Organisation	Oxford Health NHS Foundation Trust	Department	Adult services
Staff group	Medical and dental	Job role	Consultant
Team		Contract type	Permanent
Account expiry date	13 May 2017	Windows login (ouh employees only)	
Professional registration number		Smartcard number	
Assignment (payslip) number		Stage 1 (usually line manager) approver	Laura Atyeo
Stage 2 (Caldicott Guardian) authoriser	Maggie Lay	Date submitted	13 May 2015 14:15:20

5. Click **Confirm**

New user sign up request approval

Confirm New user approval

Please confirm that you want to approve the selected new user / update user request (details below)?

Confirm Cancel

6. After completing the authorisation process, you will be taken back to the **Manage new user sign up/update requests** screen where the applicant will no longer appear. If there are any other applications to review, you will see them here.

User's Name: OxCS Maggie

Previous Log-in: First Login

Failed Log-ins: 0

Users are reminded that their actions are logged and that they may only access records of patients with whom they have a legitimate clinical/professional relationship.

NHS Confidential: Personal Data about a patient

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Find Patient Filter

OxCS Patient Search

Manage New User Sign Up / Update Requests

Manage new user sign up / update requests

Current filter settings (click 'Filter' button to update settings)

Request Status: Active Requests Only (default) Request Type: All Request Types (default) Requests Order By: Request Date (default)

Approver (line manager) new user / update existing user requests assigned to your user						
Type	Name	Email	Telephone	Request Date	Status	Action
There are no new user / update existing user requests currently assigned to your user in the role of Approver.						

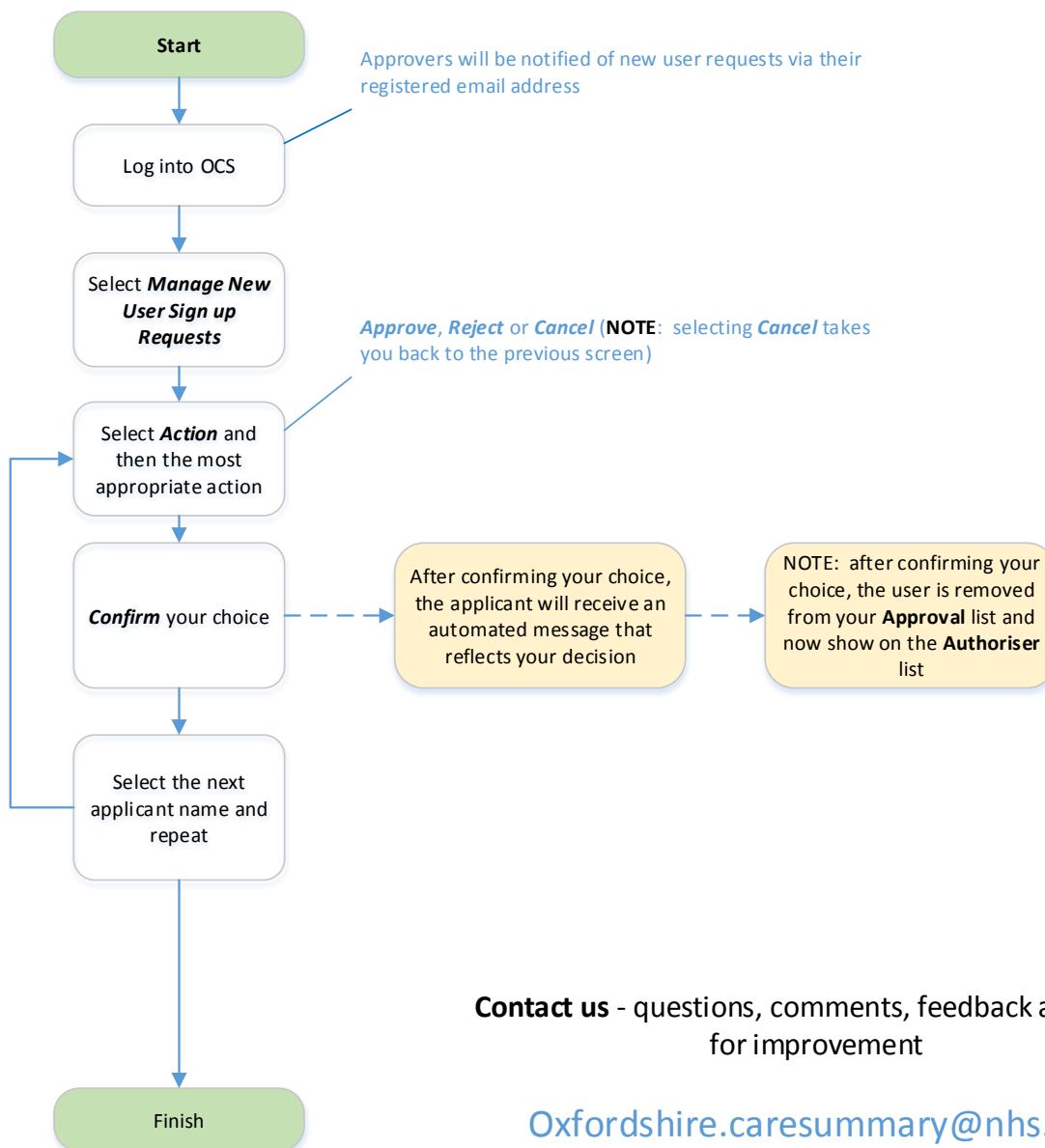
Authoriser (Caldicott Guardian/department manager) new user / update existing user requests assigned to your user						
Type	Name	Email	Telephone	Request Date	Status	Action
There are no new user / update existing user requests currently assigned to your user in the role of Authoriser.						

Ends

Appendix A – Authoriser process flow



Approver process



Contact us - questions, comments, feedback and ideas for improvement

Oxfordshire.caresummary@nhs.net