

Updating your CaseNotes account to an OCS account

User Guidance

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

Included in this document

- An introduction to the Oxfordshire Care Summary (OCS) account upgrade process
- OCS account upgrade process flow diagram (Appendix A)

Introduction

The process for upgrading a CaseNotes account to be able to access the Oxfordshire Care Summary follows three stages:

- Application
- Approval
- Authorisation

This process can also be used to update contact details, and by those who have been given approving/authorising access, and want to add clinical access to their accounts. The main difference for approvers/authorisers will be that they will need to approve/authorise themselves.

Application

It is understood that those applying for access to the OCS have a clinical requirement to access the information held on the OCS and will be based in the following locations:

Emergency Department	Out of Hours GP	Regular GPs
MIUs and EMUs	OUH Clinicians and Pharmacists	Oxford Health Clinicians

Approval

The person who Approves applications to progress to the final (Authorisation) stage will be your line manager. You will be able to select your line manager, or deputy, from a list after you have chosen the organisation and department from the various drop-down lists located on the on-line form.

Authoriser

The person who will Authorise your application is the Caldicott Guardian for the organisation. The Caldicott Guardians for the various organisations are listed below:

Organisation	Caldicott Guardian
General Practitioners	Specific to GP practice
Oxford Health Foundation Trust	Mark Hancock and Sue Haynes (listed as OHFT Caldicott Guardian)
Oxford University Hospitals NHS Trust	Chris Bunch
Principle Medical Ltd	Laura Spurs

NOTE: If you are upgrading your account then your approver and authoriser should appear in the correct fields automatically. However, you will still be able to input them manually if they do not.

Process

1. Go to the Oxfordshire Care Summary login page:

<https://oci.oxnet.nhs.uk/casenotes/stxx/PasswordLogin.jsp>

2. Click on the **Oxfordshire Care Summary new user sign up here** hyperlink



Patient Searches: Use ward/clinic lists to ensure current MRN is selected for patient. Some patients may have multiple MRNs, you must search via name, DOB or NHS number to return all results.

Enter log-in details below:

Username:

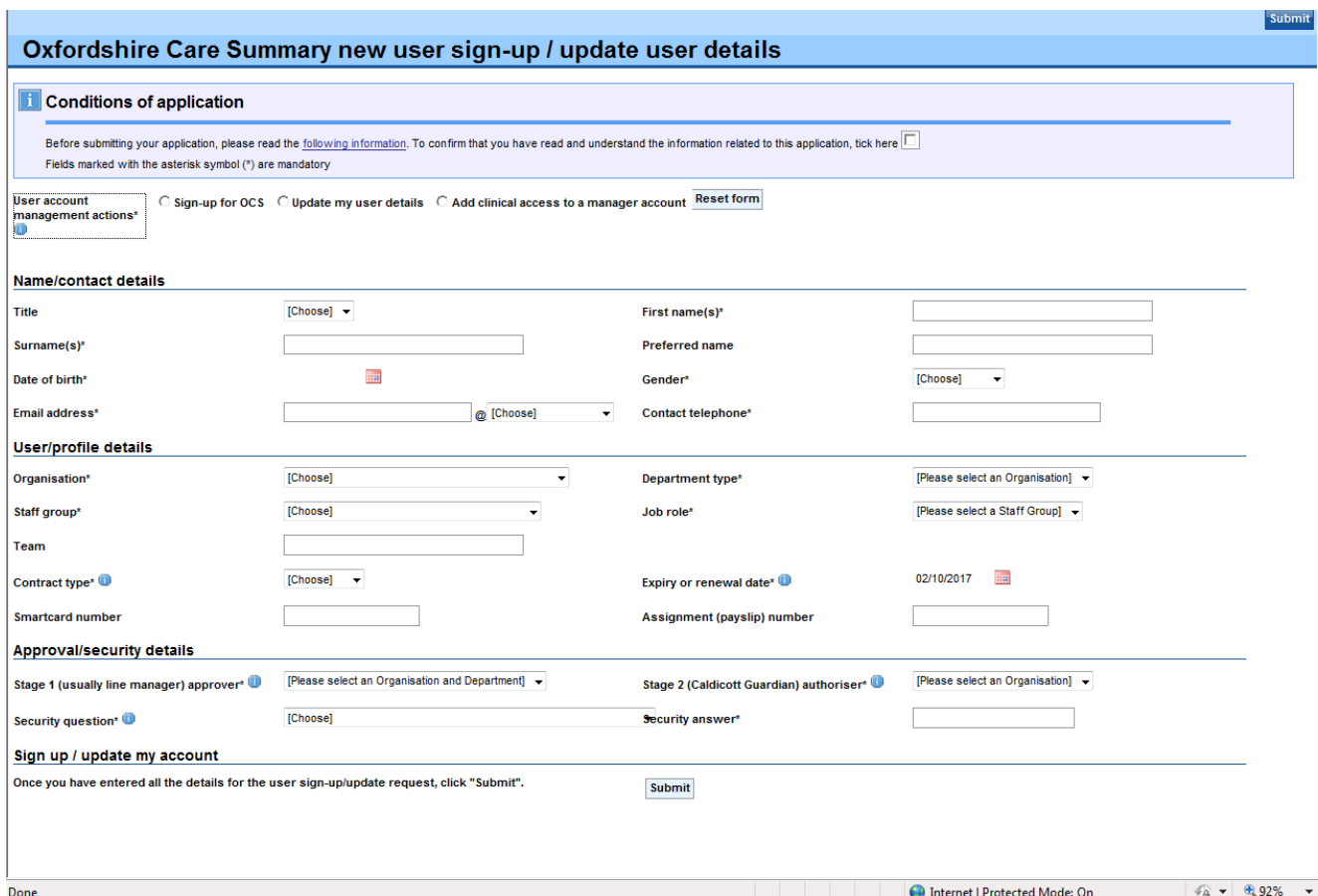
Password:

[Oxfordshire Care Summary New user sign up here](#)

Need Help?
Any problems please contact the OUH IM&T Service Desk: +44 (0)1865 (2)22822 or e-mail: imandservicedesk@ouh.nhs.uk
REMINDER - Get your SmartCard!

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Build: B287 R3 (cnvmt)

The online sign-up form will launch (as below)



Oxfordshire Care Summary new user sign-up / update user details

Conditions of application

Before submitting your application, please read the [following information](#). To confirm that you have read and understand the information related to this application, tick here

Fields marked with the asterisk symbol (*) are mandatory

User account management actions* Sign-up for OCS Update my user details Add clinical access to a manager account

Name/contact details

Title [Choose] First name(s)*

Surname(s)* Preferred name

Date of birth* Gender* [Choose]

Email address* @ [Choose] Contact telephone*

User/profile details

Organisation* [Choose] Department type* [Please select an Organisation]

Staff group* [Choose] Job role* [Please select a Staff Group]

Team

Contract type* [Choose] Expiry or renewal date* 02/10/2017

Smartcard number Assignment (payslip) number

Approval/security details

Stage 1 (usually line manager) approver* [Please select an Organisation and Department] Stage 2 (Caldicott Guardian) authoriser* [Please select an Organisation]

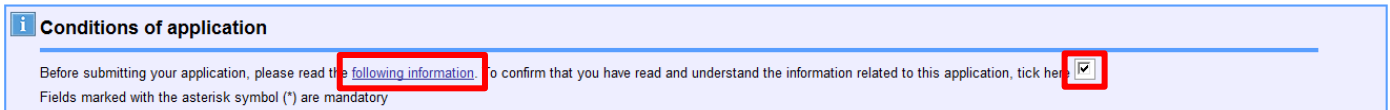
Security question* [Choose] Security answer*

Sign up / update my account

Once you have entered all the details for the user sign-up/update request, click "Submit".

Done Internet | Protected Mode: On 92%

- Users must first confirm that they have understood the OCS Terms and conditions, which can be accessed via the hyperlink provided

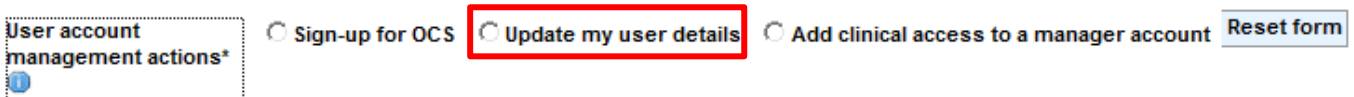


Conditions of application

Before submitting your application, please read the [following information](#) to confirm that you have read and understand the information related to this application, tick here

Fields marked with the asterisk symbol (*) are mandatory

- Select **Update my user details** as below



User account management actions*

Sign-up for OCS **Update my user details** Add clinical access to a manager account

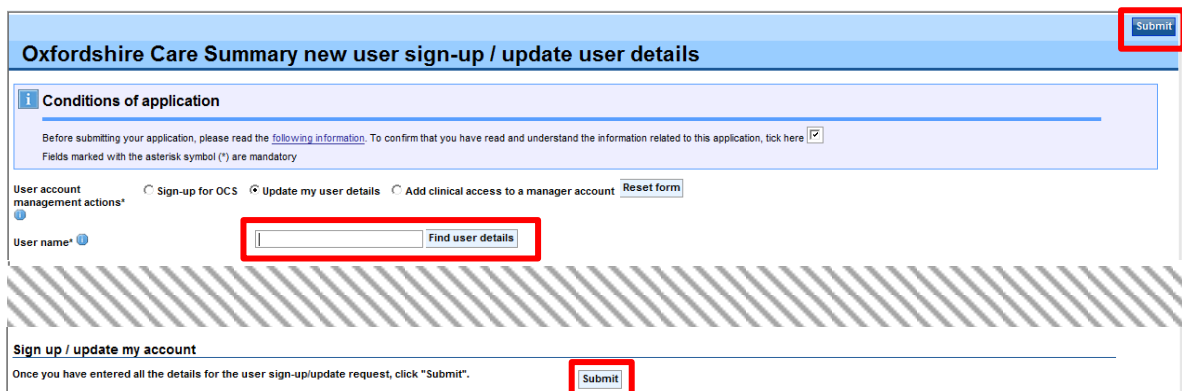
- You will need to enter the username of the account that needs updating (as below).

NOTE: If you try to update user details and you do not already have an account, user details will not be pulled through to the form

- The form will auto-populate with your known name/contact details, as well as your user/profile details. Make sure that all the details are entered correctly. You will need to enter your security question and answer manually.

NOTE: You will need to enter your security answer exactly the same way as you entered it when you first received a CaseNotes account, otherwise the update will fail. Where some answers have been carried across from written forms, some rogue spaces or other characters may exist. **If you are certain that you have answered your security question correctly and the form is not accepting, please email oxfordshire.caresummary@nhs.net and our team will get back to you.**

- After completing the form, select **Submit** (either at the top of the form or the bottom).



Oxfordshire Care Summary new user sign-up / update user details

Conditions of application

Before submitting your application, please read the [following information](#). To confirm that you have read and understand the information related to this application, tick here

Fields marked with the asterisk symbol (*) are mandatory

User account management actions* Sign-up for OCS **Update my user details** Add clinical access to a manager account

User name*

Sign up / update my account

Once you have entered all the details for the user sign-up/update request, click "Submit".

8. After successfully completing the form a confirmation screen will show:


New user sign up / update existing user request successfully initiated

i The new user sign-up / update existing user request has been successfully initiated.
An email has been sent to the email address specified in the sign-up request, which you **must** acknowledge for the sign-up process to continue. If this email is not received then please click [here](#) to go back and try again.

9. Go to your email and open the confirmation email that has been sent

10. Click the link embedded in the email to complete the confirmation process (image below)

From: SignUp OCS (NHS CENTRAL SOUTHERN COMMISSIONING SUPPORT UNIT) Sent: Wed 02/12/2015 15:41
To: Brown Ed (NHS CENTRAL SOUTHERN COMMISSIONING SUPPORT UNIT)
Cc:
Subject: Sent by Oxfordshire Care Summary regarding a user update request


Oxfordshire Care Summary

Dear Ed Brown,
Your update request has been received, please click [here](#) and follow the resulting instructions to confirm your request. Once this acknowledgement has been received, this request will automatically be passed on to your selected approver, Laura Atyeo (email laura.atyeo@nhs.net), for approval.

- The approver is someone who can confirm your need to access OCS, for example, your line manager
- After initial approval, the authoriser then gives final approval for OCS access; he or she is the Caldicott Guardian or someone with delegated authority

Note: If you did not make such a request then please report via the following email address, oxfordshire.caresummary@nhs.net, and this will be investigated further.

Kind regards,
Oxfordshire Care Summary Team
NHS South, Central and West Commissioning Support Unit
Jubilee House, 5510 John Smith Drive, Cowley, Oxford OX4 2LH
E: oxfordshire.caresummary@nhs.net

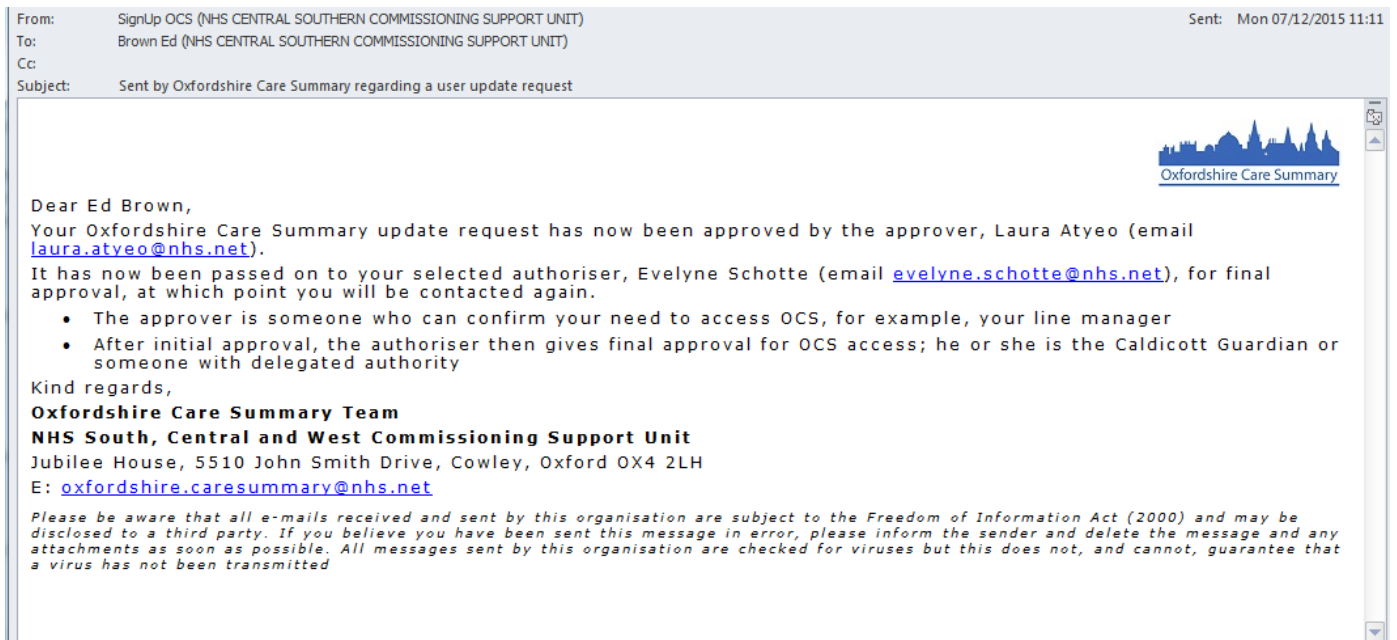
Please be aware that all e-mails received and sent by this organisation are subject to the Freedom of Information Act (2000) and may be disclosed to a third party. If you believe you have been sent this message in error, please inform the sender and delete the message and any attachments as soon as possible. All messages sent by this organisation are checked for viruses but this does not, and cannot, guarantee that a virus has not been transmitted

Clicking **here** completes the confirmation process

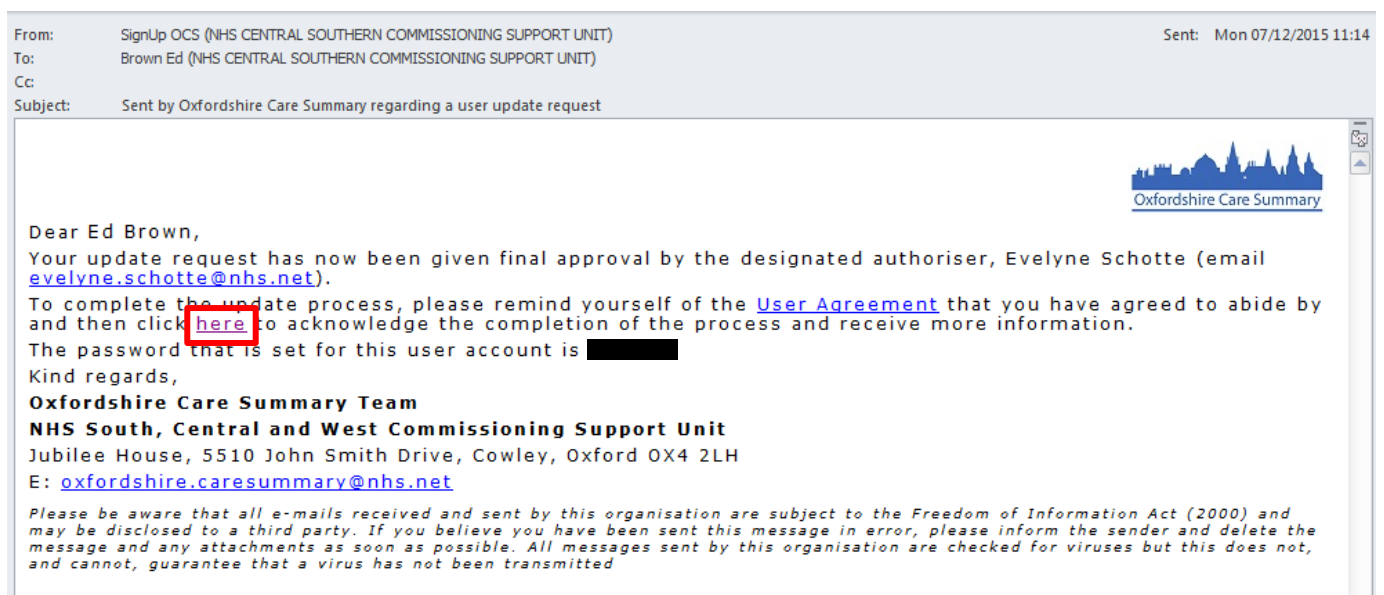
New user sign up / user update request confirmation

i You have now confirmed that you wish to continue with the new user sign-up / user update request you initiated.
Your new user sign-up / user update request will now be passed onto the approver that you selected for further processing.

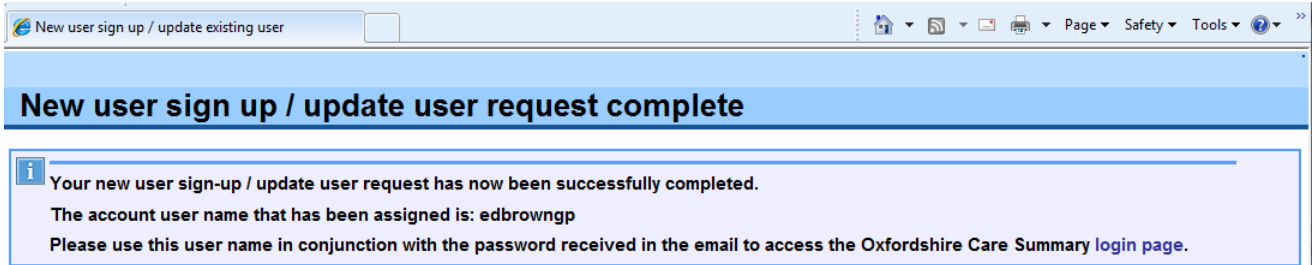
After your identified Approver has processed your upgrade application, you will receive another email to confirm the status and, if confirmed, you will be notified that your application progressed to the final stage of the application process: the Authoriser stage.



After your application has been **Authorised**, you will receive a final email that will give you a link to access the Oxfordshire Care Summary, as well as a link to remind yourself of the **User Agreement**.



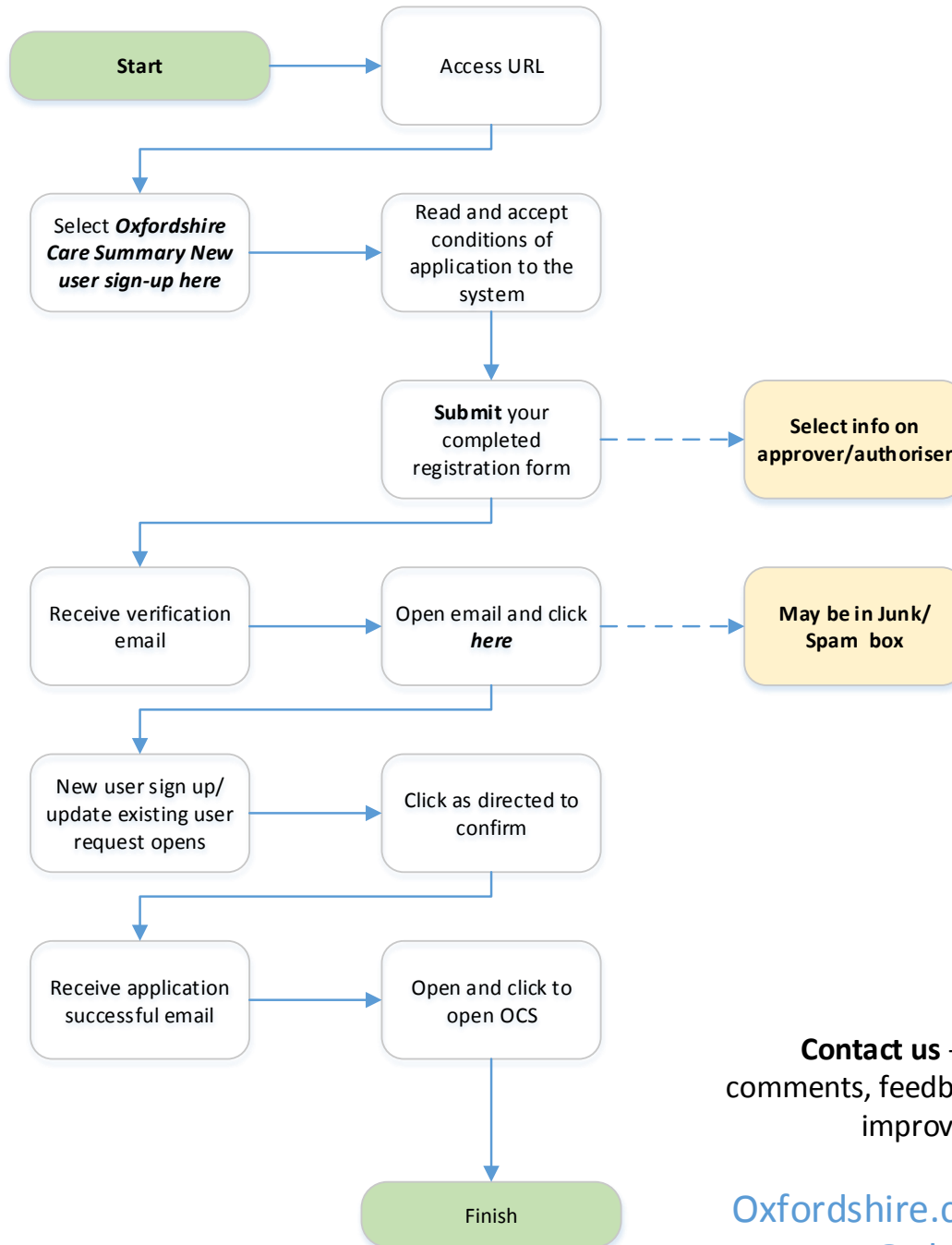
Be sure to read the **User Agreement** and click on **here** to acknowledge the completion of the process



You can now log into and use the Oxfordshire Care Summary

Appendix A. New user sign-up process flow

New user registration



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

Oxfordshire.caresummary@nhs.net

Appendix B – Further OCS resources

Information available on the Oxfordshire CCG website:

- Main page: <http://www.oxfordshireccg.nhs.uk/your-health/oxfordshire-care-summary/>
- Information and clinical governance: <http://www.oxfordshireccg.nhs.uk/your-health/oxfordshire-care-summary/oxfordshire-care-summary-in-detail/>
- Purpose, principles and consent: <http://www.oxfordshireccg.nhs.uk/your-health/oxfordshire-care-summary/oxfordshire-care-summary-in-detail-purpose-principles-and-consent/>
- Oxfordshire Care Summary and the Summary Care Record: <http://www.oxfordshireccg.nhs.uk/your-health/oxfordshire-care-summary/oxfordshire-care-record-and-summary-care-record-resources/>
- Informational video (click on the image below. If that does not work, click on the following link: <https://youtu.be/w8BNK44x-ZI>)

