

CQRS Local

System Administration & Account Management

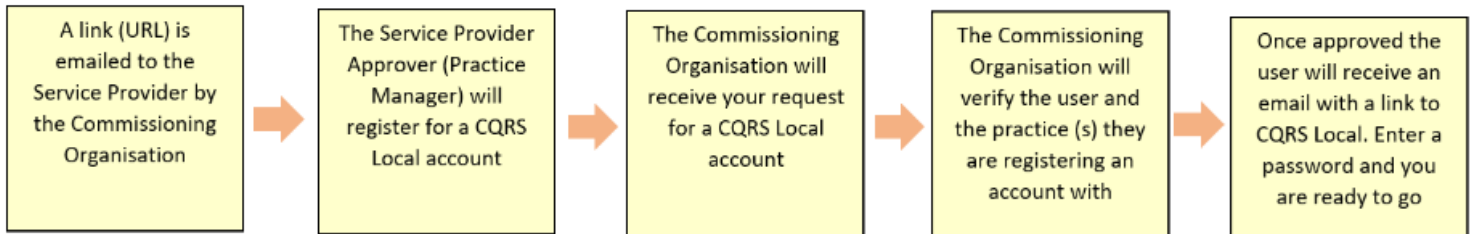
Version 1.4

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1. GP Practice Sign-up Process

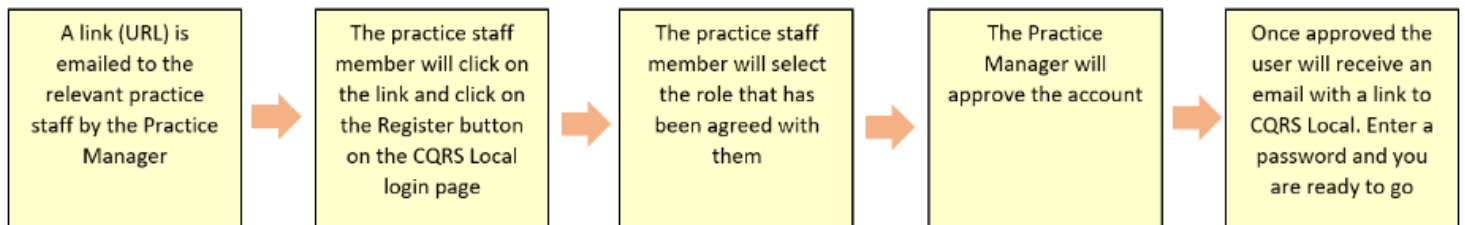
The below process will assist the GP Practice Manager to gain access to CQRS Local.

1. Self-registration and account verification process for the Practice Manager (Provider Approver)



The below process will assist other practice staff to gain access to CQRS Local.

2. Self-registration and account set up by other practice staff



Important Commissioner Note: If a GP practice has opted for a single-level approval process, this will mean that all CQRS Local account registrations will come straight to the Commissioning Organisation to approve in the first instance. If a practice has opted for a multi-level approval process, the requests will go to the Provider Approver. To get to the settings for this, the Commissioner will need to be an approver. Go to: [CQRS Local Home Page - Providers - View - Tick/Untick Multi-level approval box.](#)

2. Administration - System Rights

The CQRS Local Service Desk has full administration rights and all below functionality is available to them.

Below is a table detailing the system administration rights and what users can/can't do.

Note – If a Commissioner Approver locks their account they will need to consult with their Super user. If the super user locks their account they will need to call the Service Desk. If a Provider Approver locks their account they will need to consult with their Commissioning Organisation or call the Service Desk.

A Commissioning Organisation

Commissioning Organisation Activity	Comm Approver (Admin)	Comm User	Comm Super	Comm Finance	Service Desk
Setting up a new Commissioner staff member with system access	Yes	No	Yes	No	Yes
Approving system access	Yes	No	Yes	No	Yes
Unlocking a Commissioner staff member's account	Yes	No	Yes	No	Yes
Resetting a Commissioner staff	No (self)	No (self)	No (self)	No (self)	No

member's password	service)	service)	service)	service)	
Re-enabling /Disabling/Revoking a Comm staff member's account	Yes	No	Yes	No	Yes

A Service Provider

Service Provider Activity	SP Approver (Admin)	SP User	SP Finance	Service Desk
Setting up a new Service Provider staff member with system access (not an Approver account)	Yes	No	No	Yes
Approving system access	Yes	No	No	Yes
Unlocking a SP staff member's account	Yes	No	No	Yes
Re-setting a SP staff member's password	No (self service)	No (self service)	No (self service)	No (self service)
Re-enabling /Disabling/Revoking a SP staff member's account	Yes	No	No	Yes

3. Inviting a user



Important Service Provider Note: – this function can only be carried out by practices who have opted to be a multi-level approval practice. Any practice who are single-level approval you will need to register all users. Please refer to the section on [registering for an account](#).

This function allows you to invite a new user to access your organisation's CQRS Local. To invite a user, please follow the below process.

1. From your CQRS Local homepage, click on the **Users** menu tile.



2. Next is to click on the **Invite** button.



3. Enter the email address of the user that you would like to invite.
4. After you have entered the person's email address, click on the **blue arrow**.

The screenshot shows a web interface with two tabs: 'Send invitation' (active) and 'Pending Invitation'. Below the tabs is a section titled 'User'. A text prompt reads: 'Please enter the email address of the user that you would like to invite:'. Below this is an input field containing the email address 'jessica.finn@fis.nhs.uk'. To the right of the input field is a blue button with a white right-pointing arrow. A red arrow points to this button. Below the input field, there is a small note: 'Invitation can be sent to a new user only.'

- 5. Enter the first and last name of the new user.
- 6. Click on **Next**.

The screenshot shows a web interface with a section titled 'User Details'. A text prompt reads: 'This user does not exist in the system, please enter their details:'. Below this are two input fields: 'First Name' containing 'Jessica' and 'Last Name' containing 'Finn'. At the bottom right of the form are two blue buttons: 'Previous' and 'Next'. A red arrow points down to the 'Next' button.

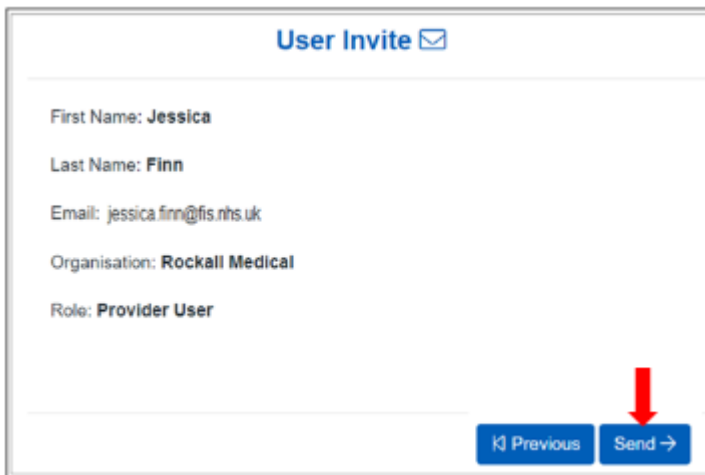
- 7. Select the organisation you want to invite the new user to and click **Next**.


The screenshot shows a web interface with a section titled 'User Organisation'. A text prompt reads: 'Please select the organisation you want to invite Jessica to:'. Below this is a list of organisations, with 'Rockall Medical' selected and highlighted in blue. At the bottom right of the form are two blue buttons: 'Previous' and 'Next'. A red arrow points down to the 'Next' button.

- 8. Next is to select the role you wish for the user to be set up with. Note – if the role is for an approver role, this can only be done by a Commissioner Approver.
- 9. Click the **Next** button.

The screenshot shows a web interface with a section titled 'User Role'. A text prompt reads: 'Please select a role for Jessica at Rockall Medical:'. Below this is a list of roles, with 'Provider User' selected and highlighted in blue. At the bottom right of the form are two blue buttons: 'Previous' and 'Next'. A red arrow points down to the 'Next' button.

10. An email invite will generate. Check that everything is correct and then click **Send**.



User Invite 

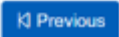

First Name: **Jessica**

Last Name: **Finn**

Email: **jessica.finn@fis.nhs.uk**

Organisation: **Rockall Medical**

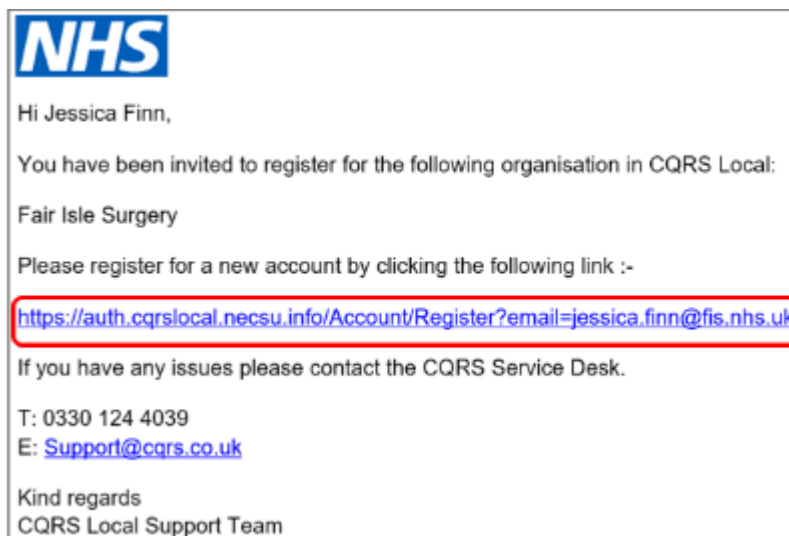
Role: **Provider User**

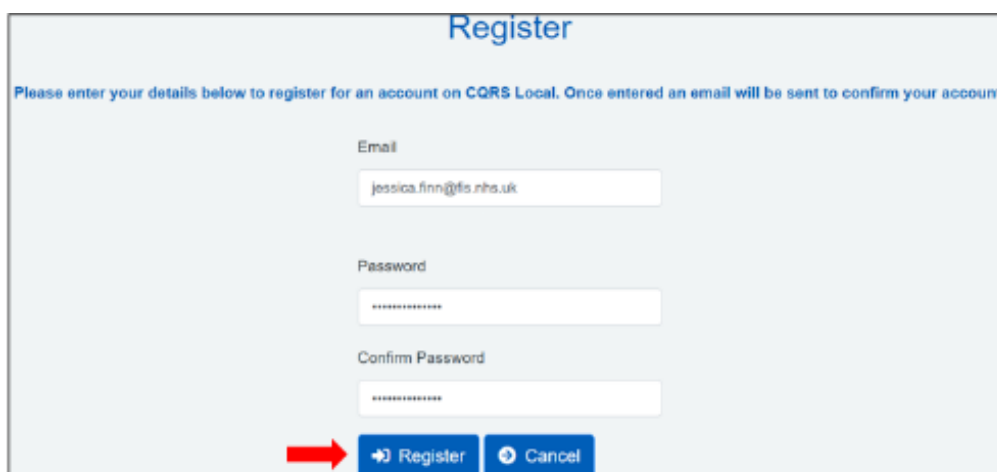
After you have clicked on **Send**, you will receive notification that the invite was successfully sent.

What will happen now?

The recipient will then receive an email which will look similar to the one shown below. They will then click on the link within the emails as highlighted below.



The user will need to enter their details and click on the **Register** button to register for an account. Once entered an email will be sent to confirm the account.





Register

Please enter your details below to register for an account on CQRS Local. Once entered an email will be sent to confirm your account.

Email

Password

Confirm Password

A message will then appear on-screen advising that an email was sent to the account to confirm it.

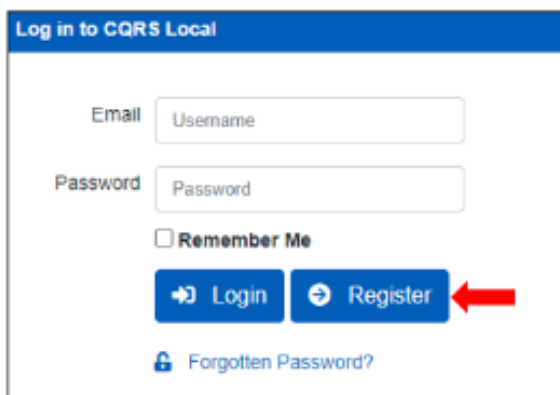
Access to CQRS Local has now been granted and the user should now be able to log in.

4. Registering for an account

Before registering for an account, it is important to read the comment please read the [Important Commissioner Note](#) in section 1.

Any user who wishes to register for an account can follow the below instructions.

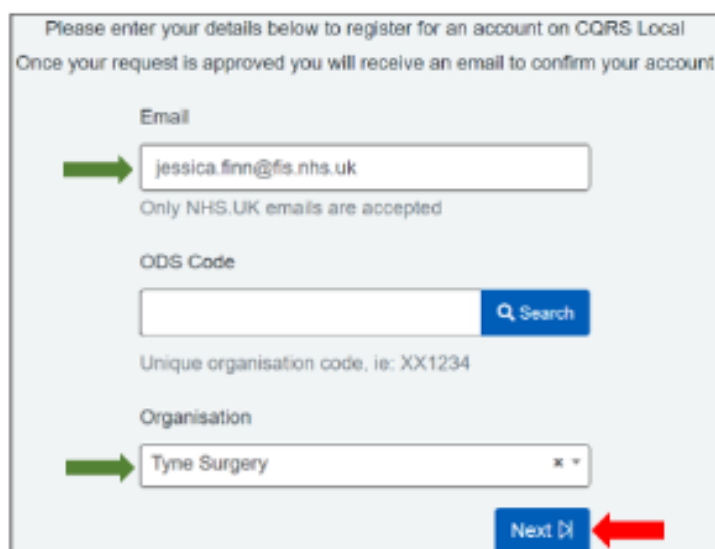
1. Click on the **Register** button.



You will then be directed to the Registration page.

2. Enter in your email address.

3. Next is to enter in your ODS code (Organisation Data Service). If this is something you are unsure of, you can type in the name of the GP practice into the Organisation field.



4. Once you have done this, click on the **Next** button.

5. Now select the role you will undertake followed by your first and last name.

6. Finally, click on the **Register** button. Once your request is approved you will receive an email to confirm your account.

Register

Please enter your details below to register for an account on CQRS Local
 Once your request is approved you will receive an email to confirm your account

Organisation role

Provider Approver
 Provider Finance
 Provider User

First Name: Jessica Last Name: Finn

Previous Register

You will then receive the following on-screen message advising you that your request is currently under review. You will receive an email to the address you registered with once our review is complete.

Thank you for registering with CQRS Local

Your request is currently under review. You will receive an email to the address you registered with once our review is complete.

What will happen now?

The Provider Approver at the practice you have requested to have access to will receive notification of your request. This will be via email and also sent as a notification to CQRS Local. The Provider Approver will then perform one of the following actions:

1. From the Approver’s CQRS Local homepage, they will click on the Notifications menu tile or click on the Users menu tile.
2. Click on the **View** button.

Home / Users

10 Search First Name or Last Name

Organisation Name	First Name	Last Name	Email	Status	Action
Tyne Surgery	Jessica	Finn	jessica.finn@fis.nhs.uk	Pending Access Request	<input type="button" value="View"/>

3. Alternatively if you have accessed this via your Notifications menu tile they will then click on the **Review** button to see the request.

Home / Notifications

Notifications

Date & Time	Type	Name	Action
02/06/2021 12:31	Request for New User Account	New user created- 17231- Provider User	<input type="button" value="Review"/>

4. The details of the request will then be presented to you. Click **Approve** or **Reject** (if your decision was to reject the request, you will need to state a reason why).

5. Lastly, click on the **Confirm** button.

Details for Jessica Finn

Outstanding Request For Additional Role

Date	Role	Reason for Role
02 Jun 2021	ProviderUser	New account request- self registration

Approve
 Reject

Username	First Name	Last Name	Email
jessica.finn@fis.nhs.uk	Jessica	Finn	jessica.finn@fis.nhs.uk

Email Confirmed
 Access Denied

6. You will then receive an email to thank you for registering for CQRS Local. Within the email will contain a secure login link which when clicked on will take you to the CQRS Local login page where you will be able to set your password.

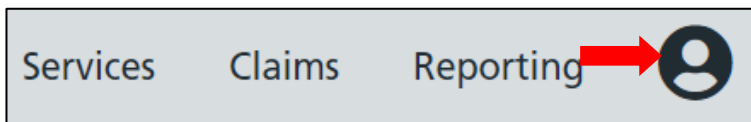
5. Resetting Your Password



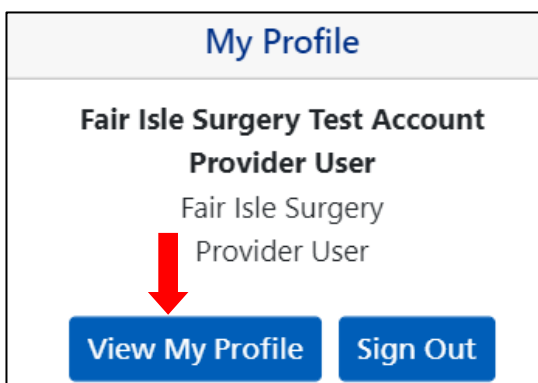
Password re-sets are self-service and must be done by the user themselves. You can reset this from the main screen. You would only need to ring the service desk if you've forgotten both your username and password.

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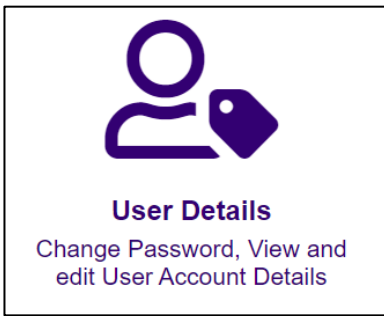
1. From your Home page, click on the **View My Profile** icon.



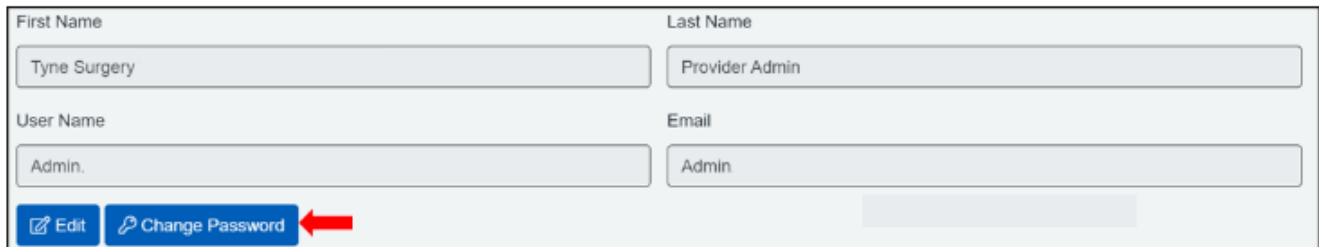
2. Click on the **View My Profile** button.



3. Click on the **User Details** menu tile.



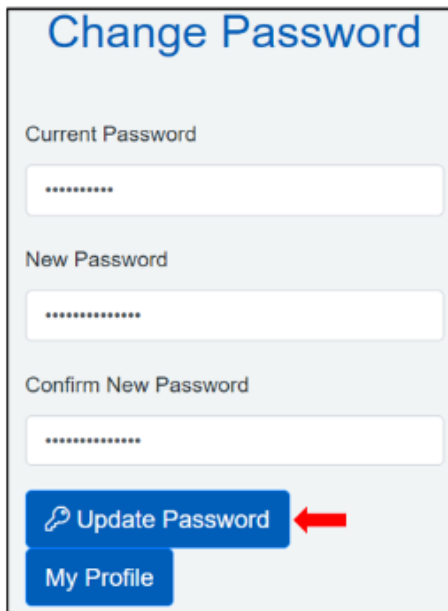
4. From the User Details section, click on **Change Password**.

A form with four input fields: "First Name" (Tyne Surgery), "Last Name" (Provider Admin), "User Name" (Admin.), and "Email" (Admin.). Below the fields are two buttons: "Edit" and "Change Password". A red arrow points to the "Change Password" button.

5. Type in your current password and then type on your new password and then confirm it.

Please note: Passwords must be at least 8 characters and contain all of the following: upper case (A-Z), lower case (a-z), number (0-9) and special character (e.g. !@#\$%^&*)

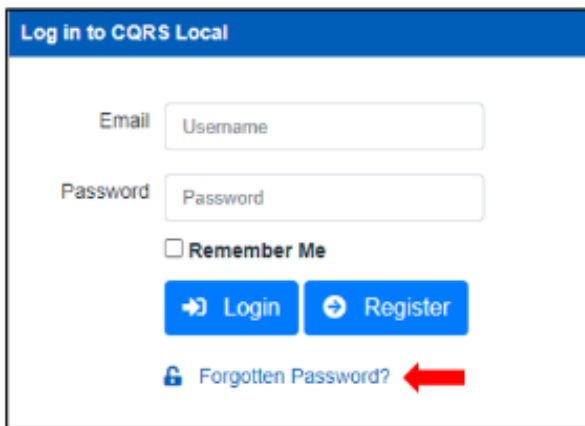
6. Lastly, when you have completed this, click on the **Update Password** button.

A form titled "Change Password" with three input fields: "Current Password", "New Password", and "Confirm New Password". Below the fields are two buttons: "Update Password" and "My Profile". A red arrow points to the "Update Password" button.

6. Forgotten Password

All password resets are self-service – you can reset this from the main screen. You would only need to ring the service desk if you've forgotten both your username and password.

1. If you have forgotten your password, click on the **Forgotten Password** link. You will be presented with the following screen.



Log in to CQRS Local

Email Username

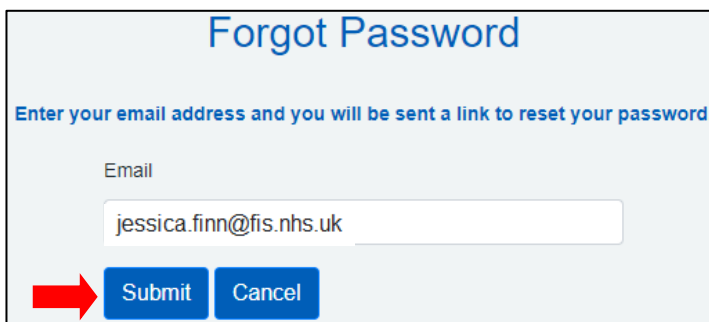
Password Password

Remember Me

→ Login ← Register

🔒 Forgotten Password? ←

2. Enter the email address that your account was registered with and click on the **Submit** button. When you receive your email from CQRS Local, follow the steps.



Forgot Password

Enter your email address and you will be sent a link to reset your password.

Email

jessica.finn@fis.nhs.uk

→ Submit Cancel

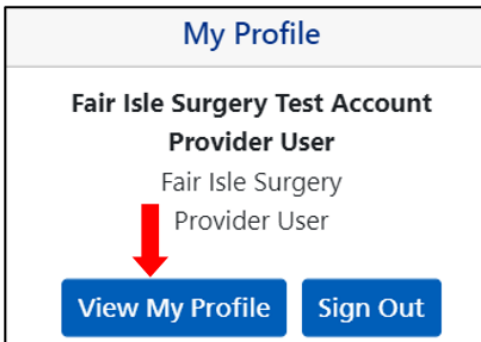
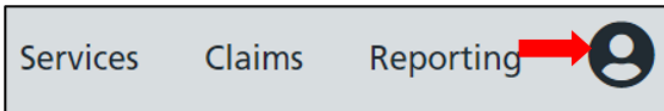
7. Forgotten User Name

Your Username is always your email address. Please speak with your manager if you need to be reminded what your email address is. If you require further assistance with this, please call the Service Desk on 0330 124 4039.

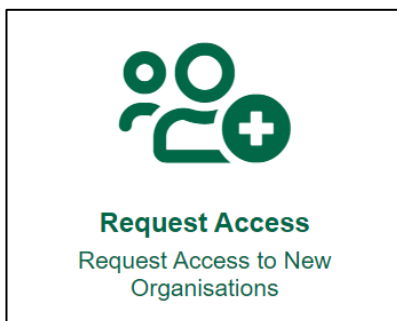
8. Requesting Access / Approving Access

This section is for a user who wishes to request an additional role. This could be access to Commissioning Organisation or a GP practice.

1. Click on the **View My Profile** icon located at the very right upper part of your screen.
2. Next is to click on the **View My Profile** button.



3. From your My Profile screen, click on the **Request Access** menu tile (This is also available by clicking on the Available Roles menu tile followed by clicking on the Request Access link).



4. Carefully type the exact name of the organisation into the search box and click on the organisation name when it is highlighted in blue.

5. Click on the **Next** button.



6. The next page will then ask you to select your role at your chosen organisation along with a reason.

7. Once you have completed this section, click on the **Next** button to proceed.

Role

Please select a role at: **Cromarty Medical**

Provider Approver

Provider Finance

Provider User

Reason For Role

I will be working at your site for 2 days a week and will require Provider User access to assist you with your claims.

Explain reason for role. maximum 250 letters.

⏪ Previous Next ⏩

8. Next is to confirm that you are happy with the information which you be submitting.

9. Finally, click on the **Send** button.

Access Request ✉

First Name: **Fair Isle Surgery Test Account**

Last Name: **Provider Admin**

Email: **Admin.UATP6@nhs.fake**

Organisation: **Cromarty Medical**

Role: **Provider User**

Reason for request: **I will be working at your site for 2 days a week and will require Provider User access to assist you with your claims.**

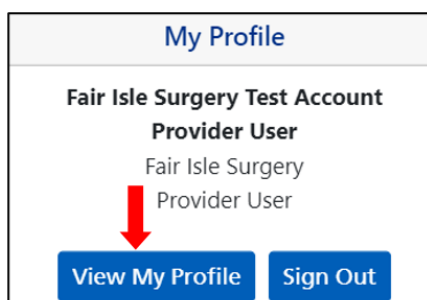
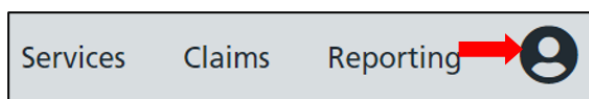
⏪ Previous **Send** →

You will then receive a notification that your request for access was successfully submitted.




You can check to see the status of your access request by following these steps:

10. Click on the **View My Profile** icon located at the very right upper part of your screen.

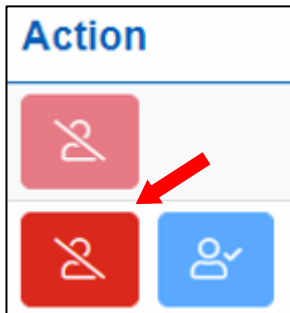
11. Next is to click on the **View My Profile** button.



- Click on the **Available Roles** menu tile.
- You will then see that your status is currently Pending.

Organisation	Role	Status	Action
Fair Isle Surgery	Provider Approver	Active role	
Cromarty Medical	Provider User	Pending	 





14. Should you decide to withdraw the request, you can do this by clicking on the red **Withdraw** icon.



What will happen now?

After you sent your request off to the organisation the Approver there will need to log in to CQRS Local and approve your request. This is done by:

- Clicking on the **Users** menu tile from the homepage.
- Looking for the organisation that has a status of Pending Access Request and clicking on **View**.


Organisation Name	First Name	Last Name	Email	Status	Action
Fair Isle Surgery	Fair Isle Surgery Test Account	Provider Admin	Admin.UATP6@nhs.fake	Pending Access Request	
Cromarty Medical	Cromarty Medical Test Account	Provider Admin	Admin.UATP3@nhs.fake		
Cromarty Medical	Cromarty Medical Test Account	Provider Finance	Finance.UATP3@nhs.fake		
Cromarty Medical	Cromarty Medical Test Account	Provider User	User.UATP3@nhs.fake		

- Next you will need to verify the name and either **Approve** or **Reject**. (if your decision was to reject the request, you will need to state a reason why).
- Lastly, click on the **Confirm** button.

Details for Fair Isle Surgery Test Account Provider Admin




Outstanding Request For Additional Role

Date: 02 Jun 2021 Role: ProviderUser Reason for Role: I will be working at your site for 2 days a week and will require Provider User access to assist you with your claims.

Approve
 Reject
 

Username	First Name	Last Name	Email
Admin.UATP6@nhs.fake	Fair Isle Surgery Test Account	Provider Admin	Admin.UATP6@nhs.fake

5. The user who requested the access will now see that it is no longer Pending.

Organisation	Role	Status	Action
Fair Isle Surgery	Provider Approver	Active role	
Cromarty Medical	Provider User		 

6. The user who requested the access will know that it has been Approved when they next log in to CQRS Local. Their screen will show that multiple roles are available and therefore they will need to select the appropriate one before clicking on the **Confirm** button.

Multiple Roles Are Available

Please select your preference from the list below

Organisation	Role	Select
Fair Isle Surgery	Provider Approver	<input checked="" type="radio"/>
Cromarty Medical	Provider User	<input type="radio"/>

9. Changing User Roles

This would be for example if a practice changed from a single-level approval to a multi-level approval, which would mean that the Practice Manager would be defaulted to a Provider User and would therefore require an upgrade of role to Provider Approver.

The user will need to either contact their Commissioning Organisation or the Service Desk (details can be found in [section 15](#)) to request that the current account is revoked. Once this has been revoked the user will then log into their account and request the new role. Please follow the instructions under [Requesting Access / Approving Access](#) for guidance.

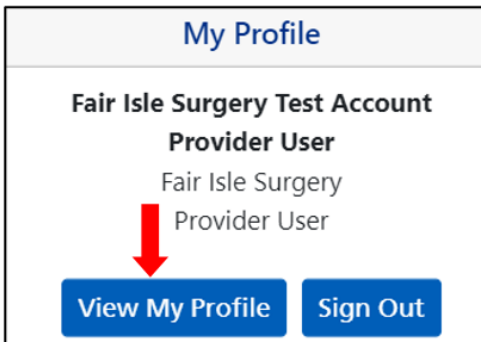
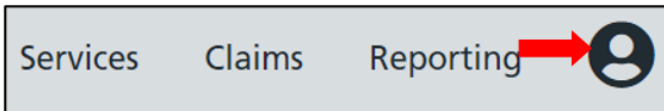
10. Disable Account

Disabling an account - this is in effect an account deletion (their data is retained for audit reasons) so if they try to login into the application, they will be notified that their account has been disabled and therefore will be unable to access CQRS Local for all organisations they are registered at.

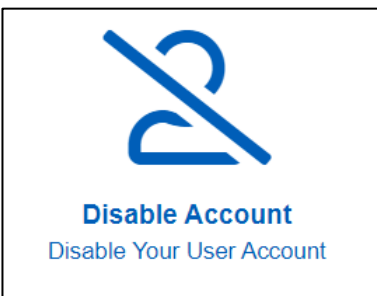
There are two ways in which this could be done. Firstly the user themselves could disable their own account, if for example they no longer required access. Secondly, this can be done by an Approver. We will look at both of these ways.

Disabling your own account:

1. Click on the **View My Profile** icon located at the very right upper part of your screen.
2. Next is to click on the **View My Profile** button.

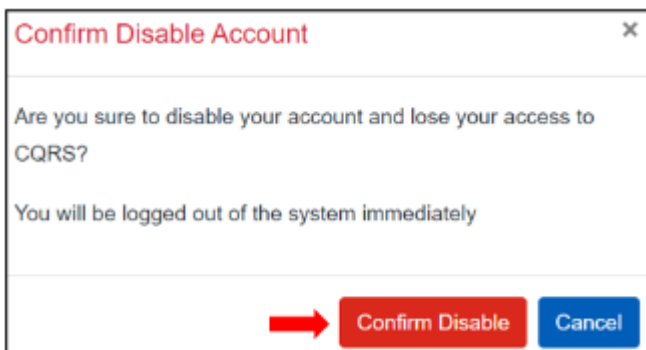


3. Click on the **Disable Account** menu tile.



4. Click the **Disable Account** button.

5. Finally, click the **Confirm Disable** button.



You will then receive a message on screen message advising you that you do not have permission to view the page. At this point you will need to click on the sign out button and log back in again.

[Approver disabling an account:](#)

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the blue **Disable Account** button.
4. You will then be required to select a reason for disabling the account. There will be 3 options which are: Left organisation, moved to another organisation or other. If you select Other, you will be required to provide a reason why up to a maximum of 250 letters.
5. Lastly, click **Confirm** to complete this process.



Please note: Once a user account is **disabled**, the user will no longer be able to have access to CQRS Local but all associated data will be held for a retention period for audit purposes.

11. Re-enabling Account Access

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the blue **Enable Account** button.
4. Click the **Confirm** button.

12. Revoking an Account

Revoking an account is when you remove all the roles associated to the account so a user will be able to login using their credentials and will still be able to get to My Profile page and then can request access to another organisation.

1. From the CQRS Local homepage, click on the **Users** menu tile.
2. Find the user whose account you wish to disable and click on the **View** button.
3. Scroll down to the bottom of the screen and click on the red **Revoke** button.
4. Click the **Confirm** button.

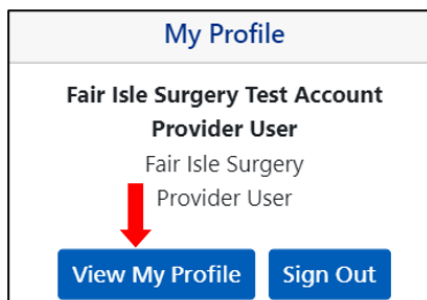
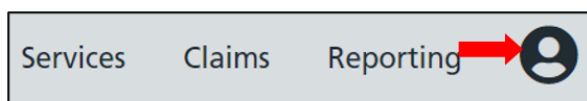
13. Locked out Accounts

Information coming soon

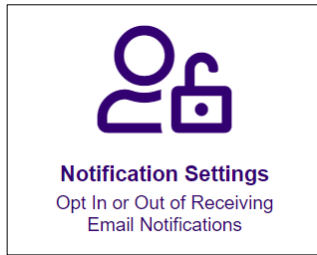
14. Stopping/Setting up Email Notifications

To set up or stop email notifications, please follow the below process.

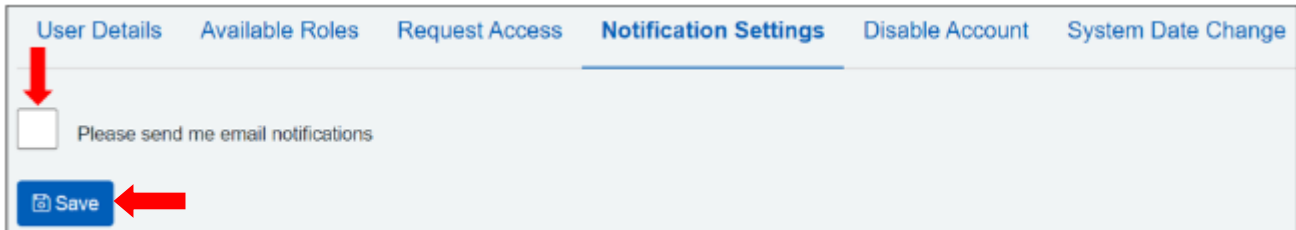
1. Click on the **View My Profile** icon located at the very right upper part of your screen.



2. Next is to click on the **View My Profile** button.
3. Click on the **Notification Settings** menu tile.



4. Tick or untick the send me notifications option.
5. Click **Save** to save your preferred settings.



User Details Available Roles Request Access **Notification Settings** Disable Account System Date Change

Please send me email notifications

Save

15. Help and Support

The CQRS service desk is here to answer any questions you may have.

If you have any queries, please contact us using the contact details below:

Telephone: 0330 124 4039

Email: support@cqrs.co.uk

User Guides & Video Tutorials

Please visit our Academy site for guidance and video tutorials. This can be accessed via the following link:

<https://academy.midlandsandlancashirecsu.nhs.uk/cqrs-local-training/>

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