



SURGERY CONNECT

The Phonebar Webinar

Presented by James Delves

Phonebar

Active Patient Window

Appointments list

Expand to show phone controls



Access Help pages

Minimised

Patient Details

Contact options

Maximised

Phone controls

Settings Availability

Mr John Smith ✕
 Age 50 (30/12/1971)

    

>>  Enter phone number     Available   



Session Agenda

- Accessing the Phonebar
- Phonebar icons
- Phone controls
- Settings
- Active Patient options
- Appointment List

Accessing the Phonebar

Once downloaded, the Phonebar will have a shortcut on your desktop.



Once set up, it will start automatically when you log in to the PC and will connect to the clinical database when you log in.



Accessing the Phonebar

The screenshot displays the EMIS Web Health Care System interface. At the top, the title bar reads "EMIS Web Health Care System - Test Organisation - 28824". Below the title bar, a yellow notification bar states "New priority Workflow Items received - GP2GP". The main content area is divided into several sections:

- Quick Launch Menu:** Contains links for Care Record (Summary, Medication), Workflow (Workflow Manager), Appointments (Appointment Book, Planner), Registration, and Reporting (Population Reporting).
- Organisation Notepad:** A text area with a message: "Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad."
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 - News** - Monday 06 June 2022: [The EMIS Practice Handbook](#). The EMIS Practice Handbook is available on EMIS Now, providing a full overview of our support services, learning and training opportunities, and ways to contact us. [Read more...](#)
 - News** - Tuesday 31 May 2022: [Registering new & returning patients](#). This free EMIS Live session is to help users identify the most efficient process to register new and returning patients. [Read more...](#)
 - News** - Thursday 19 May 2022: [Patient mismatches & PDS synchronisation](#). This free EMIS Live session is to assist users with the correct actions to take in order to synchronise patients with the PDS. [Read more...](#)
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At the bottom of the screen, the taskbar shows the Phonebar icon (a blue circle with a white telephone handset) next to the NHS logo and other system icons. A speech bubble points to this icon with the text: "The Phonebar will show as an icon in front of the clinical database attached to your taskbar".

System information at the bottom of the window includes: "Ver: 9.14.3.0000 (Microsoft Windows 10 Pro 64-bit)", "Last sign in: 20-May-2022 13:39", "Last Local Backup: 14-Mar-2022 on 11-Mar-2022 09:27", and a [Run Backup](#) link.

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A callout box in the bottom right corner contains the text: "The Phonebar can be moved from side to side by clicking and dragging to the new position". The Phonebar is located at the bottom of the screen, featuring icons for Home, Search, and Help.

The Phonebar can be moved from side to side by clicking and dragging to the new position

Phonebar Icons

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At the bottom of the screen, a phonebar contains several icons: a home icon, a user profile icon, a calendar icon, and a help icon (a question mark inside a circle). A callout box points to the help icon with the text: "Find help articles for using Surgery Connect by clicking the Surgery Connect logo".

Find help articles for using Surgery Connect by clicking the Surgery Connect logo

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At the bottom of the screen, the phonebar contains several icons: a grid of small icons, a user profile icon, a calendar icon, and a question mark icon. A speech bubble points to the calendar icon with the text: "Access your appointments list, and call patients directly from there, using the Appointments List icon".

The bottom status bar shows: NHS | Practice Manager Role | D. James (Dr) | Organisation: Test Organisation | Location: X-on medical centre (demo)

Phonebar Icons

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At the bottom of the screen, a phonebar contains three icons: a user profile icon, a calendar icon, and a help icon. A speech bubble points to the user profile icon with the text: "See the communication options for the currently selected patient using the Active Patient icon".

NHS Practice Manager Role | D. James (Dr) | Organisation: Test Organisation | Location: X-on medical centre (demo)

Phonebar Icons

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- RSS Feed:** A section with a green refresh icon and a status message: "The RSS feed has failed to load."

At the bottom of the screen, the phonebar is visible, containing icons for a keypad, a user profile, a calendar, and a help/question mark. A callout box points to these icons with the text: "Expand the Phonebar to see the phone controls by clicking on the keypad icon".

System information at the bottom left includes: NHS Practice Manager Role, D. James (Dr), Organisation: Test Organisation, Location: X-on medical centre (demo).

Phonebar Icons

The screenshot shows the EMIS Web Health Care System interface. The top navigation bar includes the EMIS logo, system version (Ver: 9.14.3.0000), and user information (D. James (D)). A yellow notification bar at the top indicates 'New priority Workflow Items received - GP2GP'. The main content area is divided into several sections: 'Quick Launch Menu' on the left, 'Organisation Notepad' in the center, and 'Latest Updates from EMIS Now' on the right. The 'Quick Launch Menu' contains icons for Care Record, Medication, Workflow Manager, Appointment Book, Registration, and Reporting. The 'Organisation Notepad' contains a message about adding notes. The 'Latest Updates' section lists news items such as 'The EMIS Practice Handbook', 'Registering new & returning patients', 'Patient mismatches & PDS synchronisation', and 'Update on EMIS Web system performance'. At the bottom, the 'Phonebar' contains several icons: a call icon, a search icon, a settings icon, an 'Available' status indicator, a user profile icon, a calendar icon, and a help icon. Four callout boxes provide instructions for these icons:

- Select the device to use**: Points to the call icon.
- Access contact numbers in the directory or via the call history**: Points to the search icon.
- Choose your system settings**: Points to the settings icon.
- Set your availability to receive calls**: Points to the 'Available' status indicator.

Phone Controls

The screenshot displays the EMIS Web Health Care System interface. At the top, the browser title is "EMIS Web Health Care System - Test Organisation - 28824". Below the browser title, there is a yellow notification bar that reads "New priority Workflow Items received - GP2GP".

The main interface is divided into several sections:

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A call control bar is located at the bottom of the screen. It includes a "User Status" dropdown menu with the following options:

- Available
- Direct Calls Only
- Do Not Disturb
- Away

A speech bubble points to the "Available" option in the dropdown menu, containing the text: "Set your availability for calls".

At the bottom left, the taskbar shows the NHS logo, the user's role "Practice Manager Role", the user name "D. James (D)", and the organisation "Test Organisation". The call control bar also features a "Enter phone number" field and a "Phone" icon.

Phone Controls

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At the bottom of the screen, a navigation bar contains several icons. A callout box points to the "Select Device" dialog box, which is open over the navigation bar. The dialog box lists the following options:

- Desktop app (here) Softphone
- Forward to mobile 07759 703538
- Desk Phone Deskphone T31P (selected with a checkmark)

Another callout box points to the "Select Device" dialog box with the text: "Select the device from those available on your profile". A third callout box points to the "Select Device" dialog box with the text: "Click the device icon".

The bottom navigation bar also includes a search bar with the placeholder text "Enter phone number", a settings gear icon, and a status indicator showing "Available".

Phone Controls

The screenshot displays the EMIS Web Health Care System interface. The main window title is "EMIS Web Health Care System - Test Organisation - 28824". The interface includes a "Quick Launch Menu" on the left with categories like Care Record, Workflow, Appointments, Registration, and Reporting. A "Colleagues" panel is open in the center, showing a search bar and a list of users with call icons. A "Phone Controls" bar at the bottom contains a search field, a call icon, and a status indicator.

Search for your colleagues and see their availability

Make a call using the Call icon for available Users

Colleagues

Search...

Appointments

- Dr Lorna
- Dr Melissa A

General Enquiries

- Dr Bensley

Hotdesk Group

Enter phone number

Available

Phone Controls

The screenshot displays the EMIS Web Health Care System interface. The main window title is "EMIS Web Health Care System - Test Organisation - 28824". The interface includes a navigation menu on the left, a central "Organisation Notepad" area, and a right-hand sidebar with "Latest Updates from EMIS Now" and "RSS Feed".

A "Call History" pop-up window is overlaid on the interface, showing a search bar and a list of call records. A speech bubble points to this window with the text: "See your Call History and dial numbers from there".

Call History Data:

Phone Number	Time	Action
07947 810483	Fri	[Dial]
Dr James D	Fri	[Dial]
Dr Lorna	Fri	[Dial]
Dr Lorna	Fri	[Dial]
Dr James D	Fri	[Dial]
Dr James D	Fri	[Dial]
Dr Lorna	Fri	[Dial]

The bottom of the interface features a taskbar with a search bar labeled "Enter phone number" and various system icons, including a gear for settings, a status indicator "Available", and user profile icons.

Phone Controls

The screenshot displays the EMIS Web Health Care System interface. At the bottom, a call control bar is visible, showing a timer at 00:15, the status 'Talking', and the name 'Dr James D'. The bar contains several icons: a record icon, a transfer icon, a hold icon, and a microphone icon. Four callouts point to these icons with the following instructions:

- When a call is connected, you will see call control icons
- Pause a call recording by clicking the Record icon
- Transfer the call
- Put the call on Hold

The main interface shows a 'Quick Launch Menu' on the left with options like Care Record, Summary, Medication, Workflow, Appointment Book, Registration, and Reporting. The central area displays an 'Organisation Notepad' with entries for 'G, Mihal (Reverend)' and 'HARNISS, Test (M)'. The right sidebar contains 'Latest Updates from EMIS Now' with news items such as 'Data Saves Lives strategy launched', 'The EMIS Practice Handbook', 'Update on EMIS Web system performance', and 'Changes to EMIS Support - April update'.

Phone Controls

The screenshot shows the EMIS Web Health Care System interface. At the top, there's a navigation bar with the EMIS logo and system information. Below that, a yellow banner indicates "New priority Workflow Items received - GP2GP". The main content area is divided into several sections: a "Quick Launch Menu" on the left, an "Organisation Notepad" in the center, and a "Latest Updates from EMIS Now" section on the right. The "Organisation Notepad" contains two entries: "G, Mihai (Reverend), 16-Jun-2022 17:48" with the note "It was a good day," and "HARNES, Test (M), 16-Jun-2022 10:32" with the note "Have a good day :)". The "Latest Updates from EMIS Now" section lists several news items, including "Data Saves Lives strategy launched" (Friday 17 June 2022), "The EMIS Practice Handbook" (Monday 06 June 2022), "Update on EMIS Web system performance" (Tuesday 10 May 2022), and "Changes to EMIS Support - April update" (Monday 11 April 2022).

At the bottom of the screen, there's a taskbar with various icons. Five callout boxes point to specific icons in the taskbar:

- Access the keypad**: Points to the keypad icon (a grid of dots).
- Mute your microphone**: Points to the microphone icon.
- Send the SMS link for a video call**: Points to the video call icon (a camera).
- End the call**: Points to the red phone icon.
- Access the keypad**: Points to the keypad icon.

The taskbar also shows the time as 00:15, the user as "Talking Dr James D", and a status indicator as "Available".

Settings

The screenshot displays the EMIS Web Health Care System interface. At the top, the title bar reads "EMIS Web Health Care System - Test Organisation - 28824". Below the title bar, a yellow notification bar states "New priority Workflow Items received - GP2GP".

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A speech bubble in the lower center of the screen contains the text: "Change how the Phonebar interacts with the clinical database in Settings". A line from this bubble points to the settings gear icon in the bottom right corner of the interface.

The bottom of the screen shows a navigation bar with the following elements: "NHS Practice Manager Role", "D. James (D)", "Organisation: Test Organisation", a "Phonebar" icon, a search input field with "Enter phone number", a "Phone" icon, a "User" icon, a "Refresh" icon, a "Settings" gear icon, an "Available" status indicator, a "User" icon, a "Calendar" icon, and a "Help" icon.

Settings

GP2GP - 17 (17)
New priority Workflow Items received - GP2GP

Ver: 9.15.4.0000 (Microsoft Windows 10 Pro 64-bit)
Last sign in: 10-Jun-2022 14:35
Last Local Backup: 14-Mar-2022 on 11-Mar-2022 09:27 [Run Backup](#)

emisWeb

Quick Launch Menu
Care Record
Summary
Medication
Workflow
Workflow Manager
Appointments
Appointment
Registration
Registration
Reporting
Population Re

Consultations
Investigations

Settings
Preferences
Audio & Video
About

Dr James D
APPLICATION PREFERENCES

- Quick File** Gives you the option to quickly file a call or SMS to the EMIS record, without having to go to Contact history.
- Find patient record for incoming calls** Look up the EMIS patient record of the caller when you receive an incoming call.
- Auto login** Automatically log into your deskphone when you start the Surgery Connect application.
 - On
Automatically log me in on the phone.
 - Confirm
Ask me what to do each time.

Phonebar: Enter phone number

EMIS Now My Cases EMIS Health
Thursday 09 June 2022
Customising EMIS Web Consultations
ve session is to assist new and existing EMIS Web users with the
figuration for Consultations
Read more...
Thursday 09 June 2022
Workflow Manager for efficiency
ve session is to
Workflow Man
Practice Handbook
e Handbook is
ices, learning
S Web system performance
a further update on EMIS Web system performance and what we're
...
failed to load.
or click Configure RSS Feed to configure your RSS feed.

File communications as soon as it's complete using Quick File

Use the Phonebar to log in to a deskphone

Automatically search the clinical database on inbound calls

Active Patient options

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A callout box with a blue border and white background is positioned over the bottom right of the interface, containing the text: "See the communication options for the patient currently active in the clinical database". The callout box has a pointer directed towards the bottom right corner of the screen, where a toolbar contains icons for a search bar (with "Enter phone number" text), a user profile icon, a refresh icon, a settings gear, and a status indicator showing "Available".

At the bottom of the screen, the NHS logo is visible on the left, followed by the text "Practice Manager Role | D. James (D) | Organisation: Test Organisation".

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A callout box with a speech bubble points to the bottom right of the interface, containing the text: "See the communication options for the patient currently active in the clinical database". This callout points to a patient information card for "Mr John Smith" (Age 50, 30/12/1971) which includes icons for phone, email, camera, video call, and refresh.

The bottom of the screen shows a taskbar with the NHS logo, "Practice Manager Role", "D. James (D)", "Organisation: Test Organisation", and a search bar with the text "Enter phone number".

Active Patient options

Ver: 9.14.3.0000 (Microsoft Win)
Last sign in: 07-Jun-2022 14:52
Last Local Backup: 14-Mar-2022

em^{is}Web

Quick Launch Menu
Care Record
Cor Inv
Plar
Registration
Reporting
Population Reporting

GP2GP - 17 (17)
New priority Workflow Items received - GP2GP

EMIS Web Health Care System - Test Organisation - 28824

Appointments

Session: telephone call back (00:00-00:00) (Dr Lato) | Date: Today | REFRESH

SMS ALL PATIENTS

Actioned	Time ↓	Patient	Date of birth	Contact options
<input type="radio"/>	08:00	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:00	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:10	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:20	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:30	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:40	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh
<input type="radio"/>	10:50	Mr Gareth Blinx	01/06/1988	Phone, Email, Camera, Video, Refresh

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Practice Manager Role | D.James (Dr) | Organisation: Test Organisation

Enter phone number | Available

Select the correct list

Contact the patients directly from the list

View your appointments list

Contact Us

If you may interested in using the Phonebar in your surgery and use EMIS as your clinical database, please email

products@x-on.co.uk

Your registration will be noted and we will contact you shortly.



Summary & Questions

- Accessing the Phonebar
- Phonebar icons
- Phone controls
- Settings
- Active Patient options
- Appointment List

Questions?