

# 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   



# 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), Consultations, Investigations, 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."
- Latest Updates from EMIS Now:** A news section with several items:
  - 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...](#)
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  - News** (Tuesday 10 May 2022): [Update on EMIS Web system performance](#). We've published a further update on EMIS Web system performance and what we're...

At the bottom of the screen, the Windows taskbar is visible, showing the Phonebar icon (a blue circle with a white telephone handset) next to the Start button and other taskbar 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".

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- Quick Launch Menu:** A vertical sidebar on the left containing categories like Care Record, Workflow, Appointments, Registration, and Reporting, with sub-items such as Summary, Medication, Consultations, Investigations, Workflow Manager, Appointment Book, Planner, and Population Reporting.
- Organisation Notepad:** A central panel with a green header and a message: "Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad."
- Latest Updates from EMIS Now:** A right-hand panel with a green header and a list of news items, including "The EMIS Practice Handbook", "Registering new & returning patients", "Patient mismatches & PDS synchronisation", and "Update on EMIS Web system performance".

A callout box with a blue border and white background is positioned in the lower right, containing the text: "The Phonebar can be moved from side to side by clicking and dragging to the new position". The Phonebar itself is located at the bottom right of the interface, featuring icons for home, user profile, calendar, and help.

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

# Phonebar Icons

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:

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  - 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." (Monday 06 June 2022)
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  - Update on EMIS Web system performance:** "We've published a further update on EMIS Web system performance and what we're" (Tuesday 10 May 2022)

At the bottom of the screen, a phonebar contains three icons: a home icon, a search icon, and a help icon. A callout box points to the help icon with the text: "Find help articles for using Surgery Connect by clicking the Surgery Connect logo".

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

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At the bottom of the screen, a phonebar contains three icons: a user profile icon, an appointments icon, and a help icon. A callout box points to the appointments icon with the text: "Access your appointments list, and call patients directly from there, using the Appointments List icon".

At the bottom left, the NHS logo is visible, along with the text: "Practice Manager Role | D. James (Dr) | Organisation: Test Organisation | Location: X-on medical centre (demo)".

# Phonebar Icons

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  - News** - Tuesday 10 May 2022: [Update on EMIS Web system performance](#). We've published a further update on EMIS Web system performance and what we're

At the bottom of the screen, a phonebar contains several icons. A callout bubble points to the communication icons, stating: "See the communication options for the currently selected patient using the Active Patient icon". The phonebar also includes icons for a user profile, a calendar, and a help/question mark.

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 status message: "The RSS feed has failed to load."

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 help/question mark icon. A speech bubble 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)

Expand the Phonebar to see the phone controls by clicking on the keypad icon



# Phonebar Icons

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: 'Quick Launch Menu' on the left, 'Organisation Notepad' in the center, and 'Latest Updates from EMIS Now' on the right. The 'Quick Launch Menu' includes options like 'Care Record', 'Medication', 'Workflow Manager', 'Appointment Book', 'Registration', and 'Reporting'. The 'Organisation Notepad' contains a message about adding notes. The 'Latest Updates' section lists several news items, including 'The EMIS Practice Handbook', 'Registering new & returning patients', 'Patient mismatches & PDS synchronisation', and 'Update on EMIS Web system performance'. At the bottom, there's a 'Phonebar' with several icons: a phone 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 point to these icons with the following text:

- Select the device to use
- Access contact numbers in the directory or via the call history
- Choose your system settings
- Set your availability to receive calls

# Phone Controls

The screenshot displays the EMIS Web Health Care System interface. At the top, a yellow banner indicates "New priority Workflow Items received - GP2GP". The main content area is divided into several sections:

- Quick Launch Menu:** Includes Care Record (Summary, Medication), Workflow (Workflow Manager), Appointments (Appointment Book, Planner), Registration (Registration), and Reporting (Population Reporting).
- Organisation Notepad:** A text area with a prompt: "Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad."
- Latest Updates from EMIS Now:** A news feed with items such as "The EMIS Practice Handbook" (Monday 06 June 2022), "Registering new & returning patients" (Tuesday 31 May 2022), "Patient mismatches & PDS synchronisation" (Thursday 19 May 2022), and "Update on EMIS Web system performance" (Tuesday 10 May 2022).
- RSS Feed:** A section with a message: "The RSS feed has failed to load. Refresh the feed or click Configure RSS Feed to configure your RSS feed."

A call control overlay is visible in the bottom right corner, titled "User Status". It contains the following options:

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

A speech bubble points to the "Available" option with the text: "Set your availability for calls".

The bottom status bar shows the user's role as "Practice Manager Role", the user name "D. James (D)", and the organisation "Test Organisation". It also includes a "Phone" icon and a "Phone number" input field.

# Phone Controls

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- Quick Launch Menu:** Contains links for Care Record (Summary, Medication, Consultations, Investigations), Workflow (Workflow Manager), Appointments (Appointment Book, Planner), Registration, and Reporting (Population Reporting).
- Organisation Notepad:** A text area with the instruction: "Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad."
- Latest Updates from EMIS Now:** A news feed with several items:
  - 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...](#)"
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  - News** (Tuesday 10 May 2022): [Update on EMIS Web system performance](#) - "We've published a further update on EMIS Web system performance and what we're..."
- RSS Feed:** A message stating: "The RSS feed has failed to load. Refresh the feed or click Configure RSS Feed to configure your RSS feed."

At the bottom of the screen, a blue navigation bar contains a "Phone" icon, a text input field "Enter phone number", and a "Call" button. A "Select Device" dialog box is open over the phone icon, listing three options:

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

Two callout boxes provide instructions:

- A callout pointing to the "Select Device" dialog box says: "Select the device from those available on your profile".
- A callout pointing to the "Desk Phone" option in the dialog box says: "Click the device icon".

The bottom status bar shows the user's role as "Practice Manager Role", the user name "D. James (D)", and the organisation "Test Organisation".

# Phone Controls

The screenshot displays the EMIS Web Health Care System interface. The main content area is divided into several sections:

- Quick Launch Menu:** Includes Care Record (Summary, Medication), Workflow (Workflow Manager), Appointments (Appointment Book, Planner), Registration (Registration), and Reporting (Population Reporting).
- Organisation Notepad:** A text area for notes, with a prompt to click the 'Add Organisation Note' button.
- Latest Updates from EMIS Now:** A news feed with items such as 'The EMIS Practice Handbook', 'Registering new & returning patients', 'Patient mismatches & PDS synchronisation', and 'Update on EMIS Web system performance'.
- RSS Feed:** A section for RSS updates, currently showing a failure to load.

Overlaid on the interface are two callout boxes:

- Search for your colleagues and see their availability:** Points to the 'Colleagues' panel, which includes a search bar and lists users under categories like Appointments, General Enquiries, and Hotdesk Group. Each user has a 'Call' icon (a blue circle with a white telephone handset) next to their name.
- Make a call using the Call icon for available Users:** Points to the 'Call' icon for a user in the 'Appointments' section.

At the bottom of the screen, there is a navigation bar with the following elements:

- NHS logo and 'Practice Manager Role'.
- User name: 'D. James (D)'.
- Organisation: 'Test Organisation'.
- Navigation icons: Home, Phone, Refresh, Settings, and Help.
- Status: 'Available'.
- Calendar and Help icons.

# Phone Controls

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 interface is divided into several sections:

- Quick Launch Menu:** Includes Care Record (Summary, Medication), Workflow (Workflow Manager), Appointments (Appointment Book), Registration (Registration), and Reporting (Population Reporting).
- Organisation Notepad:** Contains a message: 'Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad.'
- Latest Updates from EMIS Now:** Lists several news items:
  - 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.'
  - 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.'
  - 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.'
  - Tuesday 10 May 2022:** 'Update on EMIS Web system performance' - 'We've published a further update on EMIS Web system performance and what we're...'
- RSS Feed:** A message stating 'The RSS feed has failed to load. Refresh the feed or click Configure RSS Feed to configure your RSS feed.'

A 'Call History' pop-up window is overlaid on the interface, showing a search bar and a list of call records:

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

A speech bubble points to the 'Call History' window with the text: 'See your Call History and dial numbers from there'. At the bottom of the interface, there is a navigation bar with a search field labeled 'Enter phone number' and various system icons.

# Phone Controls

EMIS Web Health Care System - Test Organisation - 28824

GP2GP - 17 (17)

New priority Workflow Items received - GP2GP

Ver: 9.15.4.0000 (Microsoft Windows 10 Pro 64-bit)  
Last sign in: 14-Jun-2022 09:48  
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 Book
- Registration
  - Registration
- Reporting
  - Population Reporting

Consultations  
Investigations

Planner

Organisation Notepad

G, Mhai (Reverend), 16-Jun-2022 17:48  
It was a good day.

HARNESS, Test (M), 16-Jun-2022 10:32  
Have a good day :)

Latest Updates from EMIS Now

**News** Friday 17 June 2022

**Data Saves Lives strategy launched**  
The government has launched the Data Saves Lives strategy, which describes how we will use data and technology to improve the health and care of individuals. [Read more...](#)

**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 10 May 2022

**Update on EMIS Web system performance**  
We've published a further update on EMIS Web system performance and what we're doing to improve this. [Read more...](#)

**News** Monday 11 April 2022

**Changes to EMIS Support - April update**  
We've published another update on further improvements we're making to your

RSS Feed

The RSS feed has failed to load.  
Refresh the feed or click Configure RSS Feed to configure your RSS feed.

When a call is presented, you may see patient names displayed

Answer by clicking the green phone icon

Transfer the call

Put the call on Hold

00:15 Talking Dr. James D.

Available

# 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 red circle with a white dot, a right-pointing arrow, a hand with a red dot, a microphone, a grid of dots, a plus sign, a red telephone handset, a gear, a green 'Available' indicator, a person icon, a calendar icon, and a question mark icon.

Four call control icons are highlighted with callouts:

- Record icon:** A red circle with a white dot. Callout: "Pause a call recording by clicking the Record icon".
- Transfer icon:** A right-pointing arrow. Callout: "Transfer the call".
- Hold icon:** A hand with a red dot. Callout: "Put the call on Hold".
- Microphone icon:** A microphone. Callout: "When a call is connected, you will see call control icons".

The main interface includes a navigation menu on the left, an 'Organisation Notepad' in the center, and a 'Latest Updates from EMIS Now' section on the right. The 'Organisation Notepad' shows two entries: 'G, Mhai (Reverend), 16-Jun-2022 17:48' with the note 'It was a good day.', and 'HARNISS, Test (M), 16-Jun-2022 10:32' with the note 'Have a good day :)'. The 'Latest Updates' section lists several news items, including '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 bottom of the screen, there is a taskbar with several icons for call control. Five callout boxes point to these icons with the following text:

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

The interface also displays a navigation menu on the left, an 'Organisation Notepad' with patient notes, and a 'Latest Updates from EMIS Now' section on the right. The system status bar at the bottom shows 'Talking', 'Dr James D', and '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".

The main interface is divided into several sections:

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A blue speech bubble with white text is overlaid on the bottom right of the screen, pointing towards the settings gear icon in the taskbar. The text inside the bubble reads: "Change how the Phonebar interacts with the clinical database in Settings".

The taskbar at the bottom includes the NHS logo, the user role "Practice Manager Role", the user name "D. James (D)", the organisation name "Test Organisation", and a settings gear icon. The settings icon is highlighted with a green dot and the text "Available".

# Settings

The screenshot displays the EMIS Web Health Care System interface. A 'Settings' window is open, showing 'APPLICATION PREFERENCES' for 'Dr James D'. The preferences include:

- Quick File:** A toggle switch is turned off. Description: 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:** A toggle switch is turned on. Description: Look up the EMIS patient record of the caller when you receive an incoming call.
- Auto login:** A toggle switch is turned on. Description: Automatically log into your deskphone when you start the Surgery Connect application. Below this, there are two radio button options: 'On' (selected) with the subtext 'Automatically log me in on the phone.', and 'Confirm' with the subtext 'Ask me what to do each time.'

Callouts provide additional context:

- File communications as soon as it's complete using Quick File** (points to the Quick File toggle)
- Use the Phonebar to log in to a deskphone** (points to the Auto login section)
- Automatically search the clinical database on inbound calls** (points to the Find patient record for incoming calls toggle)

The background interface shows a 'New priority Workflow Items received - GP2GP' notification, a 'Quick Launch Menu' with options like 'Care Record', 'Workflow Manager', and 'Appointments', and a 'Phonebar' at the bottom with an 'Enter phone number' field and a 'Phone' icon.

# Active Patient options

The screenshot displays the EMIS Web Health Care System interface. At the top, a yellow banner indicates "New priority Workflow Items received - GP2GP". The main content area is divided into several sections:

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- RSS Feed:** A message stating: "The RSS feed has failed to load. Refresh the feed or click Configure RSS Feed to configure your RSS feed."

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, specifically towards the navigation bar.

The bottom navigation bar includes a search field with the placeholder "Enter phone number", a user profile icon, a refresh icon, a settings gear, a status indicator "Available", and a help icon.

# Active Patient options

The screenshot displays the EMIS Web Health Care System interface. The main content area shows the 'Organisation Notepad' section with the text: "Click the 'Add Organisation Note' button at the top of this section to add a note to your organisation's notepad." Below this text are two sets of keyboard shortcuts represented by button icons: "Ctrl Shift H" and "Ctrl Shift M".

On the right side, the 'Latest Updates from EMIS Now' section is visible, featuring a news item titled "The EMIS Practice Handbook" dated Monday 06 June 2022, and another dated Tuesday 31 May 2022. Below the news is an "RSS Feed" section with a message: "The RSS feed has failed to load. Refresh the feed or click Configure RSS Feed to configure your RSS feed."

At the bottom right, a patient information popup for "Mr John Smith" (Age 50, 30/12/1971) is shown, containing icons for phone, email, camera, video call, and refresh.

At the bottom of the screen, a navigation bar includes a search icon, a text input field labeled "Enter phone number", and a status indicator "Available".

**Use keyboard Shortcuts to make a call**

**See the communication options for the patient currently active in the clinical database**

- Call the active patient's Home Number.
- Call the active patient's Mobile Number.

# Appointments List

EMIS Web Health Care System - Test Organisation - 28824

GP2GP - 17 (17)

New priority Workflow Items received - GP2GP

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




































**emisWeb**

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

**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	    
<input type="radio"/>	10:00	Mr Gareth Blinx	01/06/1988	    
<input type="radio"/>	10:10	Mr Gareth Blinx	01/06/1988	    
<input type="radio"/>	10:20	Mr Gareth Blinx	01/06/1988	    
<input type="radio"/>	10:30	Mr Gareth Blinx	01/06/1988	    
<input type="radio"/>	10:40	Mr Gareth Blinx	01/06/1988	    
<input type="radio"/>	10:50	Mr Gareth Blinx	01/06/1988	    

Support Centre | My Incidents | EMIS Health

Monday 06 June 2022

adbook  
ook is available on EMIS Now, providing a full overview of  
ning and training opportunities, and ways to contact us.  
Read more...

Tuesday 31 May 2022

urning patients  
n is to help users identify the most efficient process to  
g patients  
Read more...

Thursday 19 May 2022

ad.  
figure RSS Feed to configure your RSS feed.

Select the correct list

Contact the patients directly from the list

View your appointments list

NHS Practice Manager Role | D.James (Dr) | Organisation: Test Organisation | Enter phone number | Available



# Phonebar Prompt Card

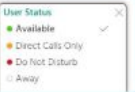

## SURGERY CONNECT

### The Phonebar Prompt Card


Getting Started

Expand the Phonebar using the dialler icon.


Set your device.  

Set your User status.  See online Help by clicking? 


Settings

Click the Settings icon to choose how Phonebar works with your clinical database. 



Receiving calls

Answer or reject an incoming call 

Hold


Put the call on hold (hold icon will pulse), click again to resume the call. 


Making calls


Type in the number and click , or search and select from the directory (internal or Central Directory) or Call History and use the call button. 

There's no need to dial anything for an outside line.


Transfer a call

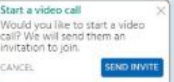

Click 

Select from your colleagues, Central Directory, Call History or dial the number to transfer to. 


Complete or cancel the Transfer 

Video Call


You can initiate, or convert a call to a video call. Click 

Click **Send Invite** to send the SMS to the caller's mobile.  

Active Patient

Call, SMS, request a photograph or video call the current active patient. File the communication using the Contact History. 

Appointment List

Clinicians can work through their appointment lists using the same communication options as those for an active patient. 

# Log out

- Phonebar

User Status ×

- Available
- Direct Calls Only
- Do Not Disturb
- Offline ✓

>>  Enter phone number      Offline   

# Help & Support

## Pre Go Live

- Call Service Delivery 03333320155
- Email [servicedelivery@x-on.co.uk](mailto:servicedelivery@x-on.co.uk)

## After Go Live

- Call Support **0333 332 6633**
- Support Portal

## Training

- Call 0333 332 6777
- Email [training@x-on.co.uk](mailto:training@x-on.co.uk)