

CQRS Local

System Administration and Account Management

Version 2.0
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1. GP Practice Sign-up Process	2
2. All User Roles Explained	2
3. A Commissioner Inviting a User	3
4. Registering for an Account	5
5. Resetting Your Password	7
6. Forgotten Password	9
7. Forgotten User Name	9
8. Requesting Access To Another Organisation	9
9. Switching User Roles (Commissioner)	13
10. Disabling Your CQRS Local Account.....	14
11. Re-enabling Account Access.....	15
12. Revoking an Account	15
13. Locked out Accounts	15
14. Stopping/Setting up Email Notifications	15
15. Help and Support	16

1. GP Practice Sign-up Process

The below processes will assist Service Providers with gaining access to CQRS Local depending on your chosen approval level set up.

1. The CQRS Local Team will set up a Commissioner as an Commissioning Account Administrator who can set other users up at their Commissioning Organisation. These other roles could be; Tier 1, Tier 2 (Approver) or Commissioning Finance.
2. A Commissioner will then email out a [registration link to](#) their GP practices' requesting for them to register for a CQRS Local account.
3. Each person at the practice who will be using CQRS Local will [register](#) for an account providing this has been agreed by their Practice Manager.
4. The Commissioning Account Administrator will receive notification of this request and will approve the account.
5. Once approved, an automated email will be sent to the Practice User who will click on a link and follow the on-screen instructions for account activation.

Key

CO – Commissioning Organisation. **SP** – Service Provider. **PM/BM** – Practice Manager/Business Manager

2. All User Roles Explained

Service Provider Roles	
Role	Responsibility
Provider User - Single-Level Approval Practices	To prepare all claims including any evidence documentation (if required) and submit to the Commissioning Organisation.
Provider User - Multi-Level Approval Practices	To prepare all claims including any evidence documentation (if required) and submit to the Provider Approver (PM).
Provider Approver (PM) - Multi-Level Practices	To check all internally submitted claims and submit to the Commissioning Organisation. This role cannot make a claim - they only approve them.

Commissioner Roles	
Role	Responsibility
Administrator	To set up/approve all CQRS Local accounts - whether this is a Commissioning colleague or a Service Provider. The Administrator will also revoke/disable accounts too.
Tier 1	To initially check all claims that are submitted by the Service Provider. This involves checking any evidence files and general vetting of claim submissions.
Tier 2	To approve all claims from a financial aspect and submit for payment.
Finance	To approve claims that have a high monetary value. These are usually claims that exceed £15,000 per practice (per claim) or go beyond the tier 2 approval limit.

NHSE Regional Roles	
Role	Responsibility
NHSE Regional Administrator	To approve all CQRS Local accounts – whether this be a NHSE Regional colleague or a Service Provider. Multiple users can have this role.
NHSE Regional User (tier 1)	To initially check all claims that are submitted by General Practice. This involves checking any evidence files and general vetting of claim submissions.
NHSE Regional Approver (tier 2)	To approve all claims from a financial aspect and submit for payment.
NHSE Regional Finance	To approve claims that have a high monetary value. These are usually claims that exceed £15,000 per practice (per claim).

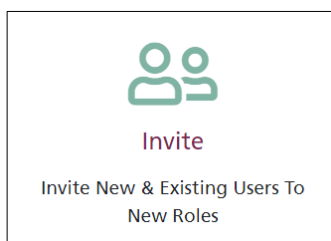
3.A Commissioner Inviting a User



Other than the Service Desk, a Commissioning Account Administrator is the only person who can [invite a new user to register for a CQRS Local account](#). A new user could be a Commissioner or a member of staff from a GP practice.

To invite a user, please follow the below process.

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



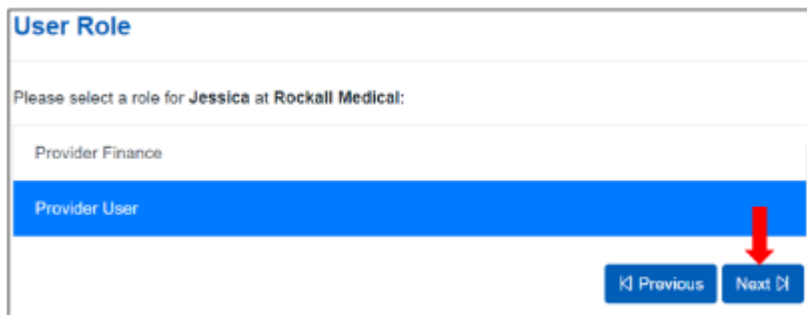
2. Enter the email address of the user that you would like to invite and click on the **blue arrow**.

3. Enter the first and last name of the new user.
4. Click on **Next**.

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

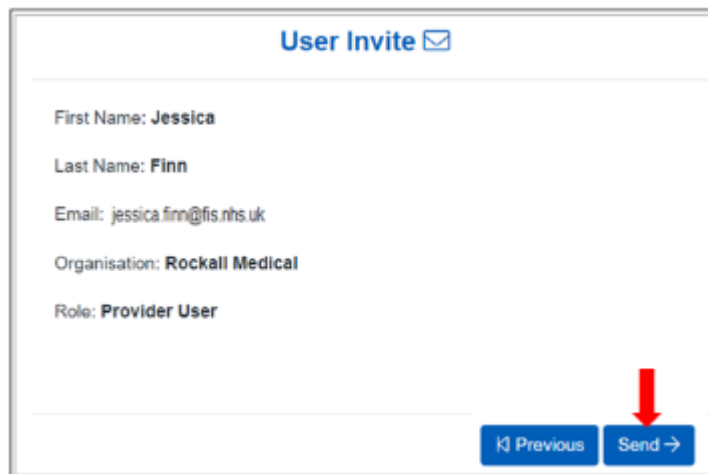
6. Next is to select the role you wish for the user to be set up with. Note – if the role is for an approver role, this can only be done by a Commissioner Approver.

7. Click the **Next** button.



The screenshot shows a web form titled "User Role". Below the title, it says "Please select a role for Jessica at Rockall Medical:". There are two radio button options: "Provider Finance" and "Provider User". The "Provider User" option is selected, indicated by a blue bar. At the bottom right, there are two buttons: "Previous" and "Next". A red arrow points to the "Next" button.

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

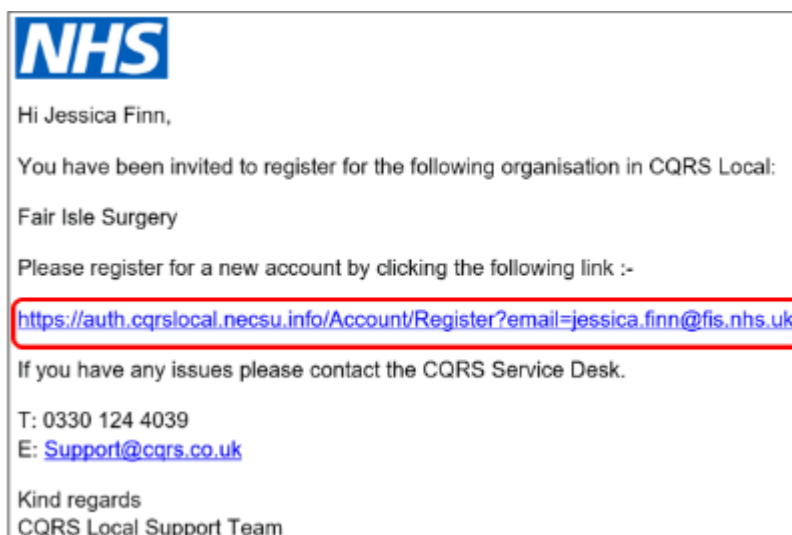


The screenshot shows a web form titled "User Invite" with an envelope icon. It displays the following information: "First Name: Jessica", "Last Name: Finn", "Email: jessica.finn@fis.nhs.uk", "Organisation: Rockall Medical", and "Role: Provider User". At the bottom right, there are two buttons: "Previous" and "Send". A red arrow points to the "Send" button.

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

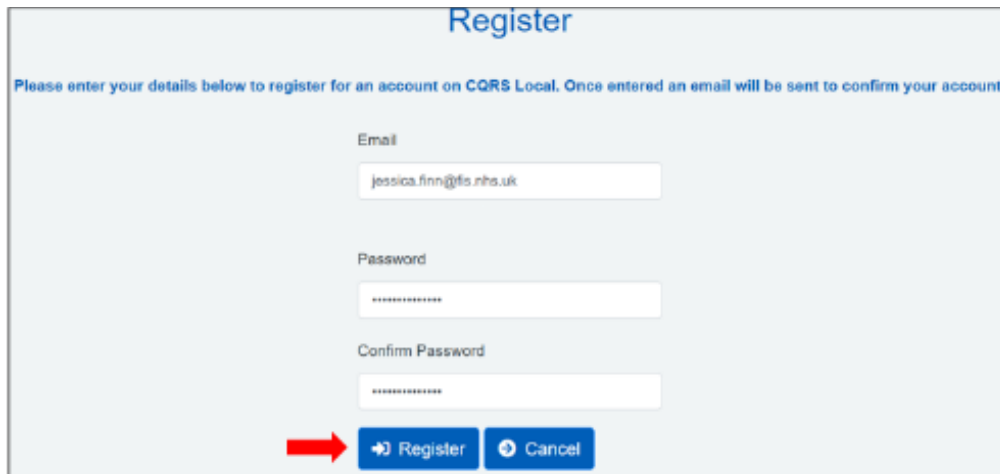
What will happen now?

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 email as highlighted below.



The screenshot shows an email from NHS. The content is as follows: "Hi Jessica Finn, You have been invited to register for the following organisation in CQRS Local: Fair Isle Surgery Please register for a new account by clicking the following link :-". A red box highlights the link: <https://auth.cqrslocal.necsu.info/Account/Register?email=jessica.finn@fis.nhs.uk>. Below the link, it says: "If you have any issues please contact the CQRS Service Desk. T: 0330 124 4039 E: Support@cqrs.co.uk Kind regards CQRS Local Support Team".

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.



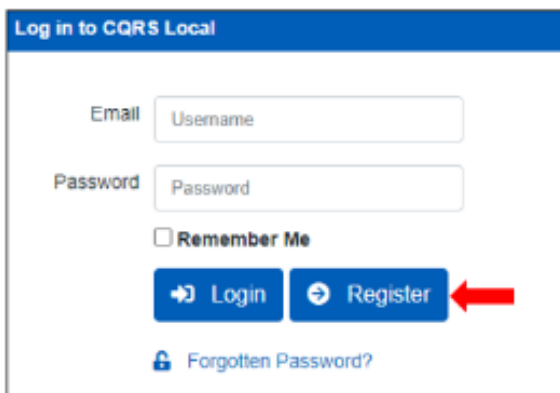
A message will then appear on-screen advising that an email was sent to the account to confirm it.

Access to CQRS Local has now been granted and the user should now be able to log in. If there are any access problems, please contact the Service Desk (details can be found at the end of this document).

4. Registering for an Account

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.

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

Email

Only NHS.UK emails are accepted

ODS Code

Unique organisation code, ie: XX1234

Organisation

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

First Name Last Name

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 Commissioning Account Administrator will receive notification of your request. This will be via email and also sent as a notification to CQRS Local. The Administrator will then perform one of the following actions:

1. From the 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		Q	Invite
Organisation Name	First Name	Last Name	Email	Status	Action
Tyne Surgery	Jessica	Finn	jessica.finn@fis.nhs.uk	Pending Access Request	 View

3. Alternatively if they have accessed this via their 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	 Review


4. The details of the request will then be presented to them. They will click **Approve** or **Reject** (if their decision was to reject the request, they will need to state a reason why).

5. Lastly, they will 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.

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

Services
Claims
Reporting



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

My Profile

Jessica Finn


Provider User

FAIR ISLE SURGERY

View My Profile

Sign Out

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



User Details

Change Password, View and edit User Account Details

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

First Name	Last Name
<input type="text" value="Tyne Surgery"/>	<input type="text" value="Provider Admin"/>
User Name	Email
<input type="text" value="Admin."/>	<input type="text" value="Admin"/>
<div><div>Edit</div><div>Change Password</div></div>	

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.

Change Password

Current Password

New Password

Confirm New Password

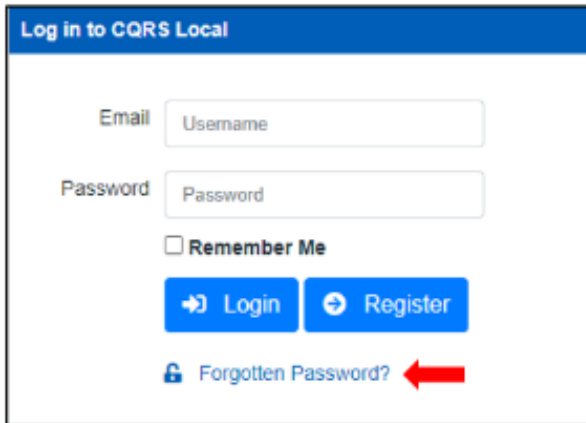
Update Password

My Profile

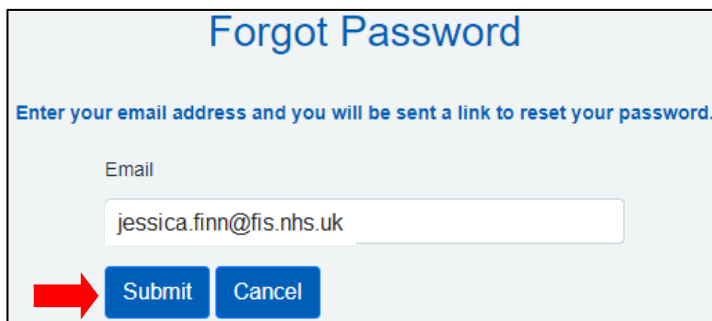
6. Forgotten Password

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.



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.



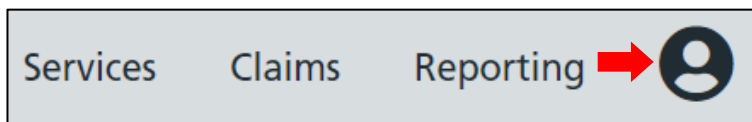
7. Forgotten User Name

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 To Another Organisation

This section is for a user who wishes to request an additional role. This could be for example a Practice Manager who manages more than one 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.

My Profile

Jessica Finn

Provider User

FAIR ISLE SURGERY

View My Profile

Sign Out

3. From your My Profile screen, click on the **Request Access** menu tile.

Request Access

Request Access to New Organisations

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.

Organisation

Please select the organisation you need access to:

Cromarty Medical

Next

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

- Next is to confirm all the information is correct.
- 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. Please now await the Commissioning Account Administrator to approve your request.
- You can check to see the status of your access request by following these steps:
- Click on the **View My Profile** icon located at the very right upper part of your screen.
 - Next is to click on the **View My Profile** button.

Services

Claims

Reporting

My Profile

Fair Isle Surgery Test Account

Provider User

Fair Isle Surgery

Provider User

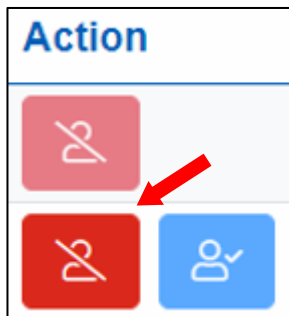
View My Profile

Sign Out

- 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	<div></div>
Cromarty Medical	Provider User	Pending	<div><div></div><div></div></div>

- 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 the Commissioning Account Administrator will need to log in to CQRS Local and approve your request. This is done by:

1. Clicking on the **Users** menu tile from the homepage.
2. 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	View
Cromarty Medical	Cromarty Medical Test Account	Provider Admin	Admin.UATP3@nhs.fake		View
Cromarty Medical	Cromarty Medical Test Account	Provider Finance	Finance.UATP3@nhs.fake		View
Cromarty Medical	Cromarty Medical Test Account	Provider User	User.UATP3@nhs.fake		View

3. 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).
4. 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

Confirm

Username

Admin.UATP6@nhs.fake

First Name

Fair Isle Surgery Test Account

Last Name

Provider Admin

Email

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	X
Cromarty Medical	Provider User		X 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. Switching User Roles (Commissioner)


This is a convenient facility for Commissioners who have more than one CQRS Local user account to switch roles without the need to have multiple logins. Some Commissioners for example will be set up as both the Administrator and Commissioning User. The following instructions will show you how you can easily switch between accounts.

Once you have entered your user name, password and logged into CQRS Local, you will be presented with a screen similar to the one shown below. Simply click on the account that you wish to use. You will then be taken straight to your homepage.

Multiple Roles Are Available



Commissioning Approver
NHS NORTH UTSIRE




Commissioning Account Administrator
NHS NORTH UTSIRE

If you are already logged in as one role, i.e. Commissioner Approver, and you wanted to switch to your Admin role, then you will need to do the following:

1. Click on your **profile** icon

Commissioning Approver (NHS NORTH UTSIRE)

Services
Contracts
Claims
Providers
Reporting



2. Next is to click on **Switch Role**.

My Profile

Jessica Finn

NHS NORTH UTSIRE

Commissioning Approver

3. You will then be asked to select your account (see image above showing both roles). After you have done this, you will then be taken straight to your CQRS Local homepage.

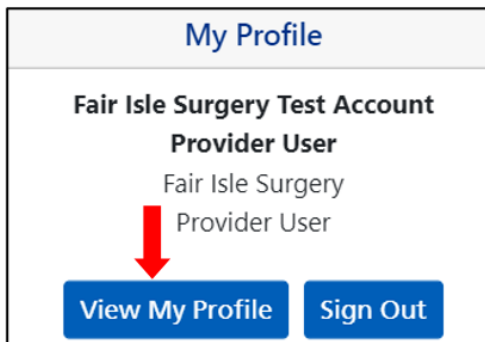
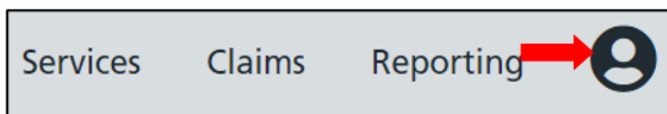
10. Disabling Your CQRS Local Account

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.

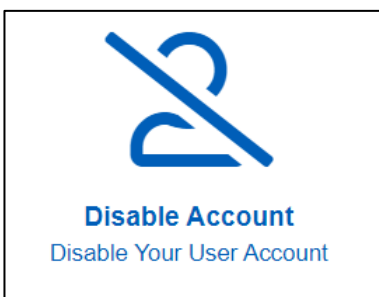
There are two ways in which this could be done. Firstly the user themselves could disable their own account, if for example they no longer required access. Secondly, this can be done by an Approver. We will look at both of these ways.

Disabling your own account:

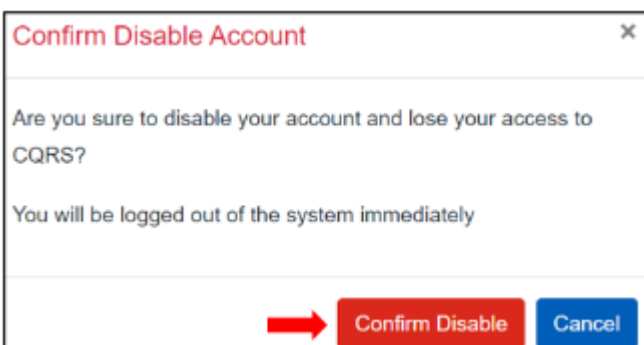
1. Click on the **View My Profile** icon located at the very right upper part of your screen.
2. Next is to click on the **View My Profile** button.



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.



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

Re-enabling a CQRS Local account will need to be undertaken by the Commissioning Account Administrator

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.

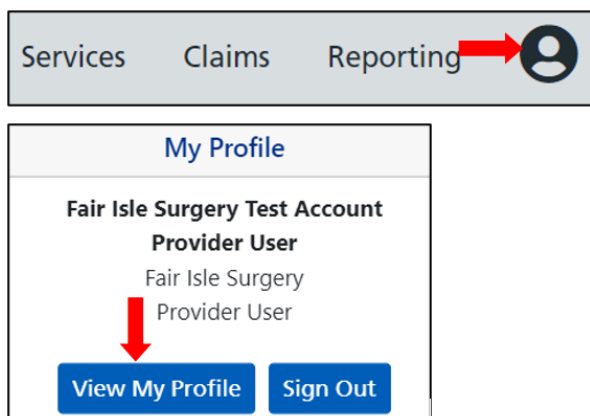
13. Locked out Accounts

For instances of account lockout, please contact the Service Desk. Their details can be found at the end of this document.

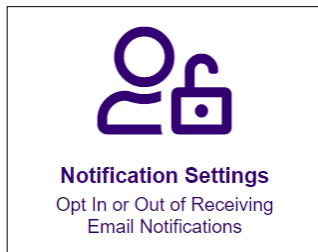
14. Stopping/Setting up Email Notifications

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 are here for you.

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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