User Management for PCSE Online

Assigning roles to PCSE Online users in your practice

The contract holder is responsible for nominating up to four User Administrators. Once the User Administrators have been set up they will receive an email from PCSE advising them of next steps.

What are the responsibilities of User Administrator(s)?

- setting up colleagues within their practice with the appropriate role(s) for their position
- deactivating users who leave their organisation
- editing users access within their practice to ensure users have the appropriate role(s) for their position.

Ophthalmic User Roles

The table below provides details of the User Roles that can be assigned.

PCSE Online Role	Role Description	Typical Practice Role(s)
Contractor Signatory	This role is for a GOS contractor or a nominated contractor signatory who needs to be able to enter patient details to create a GOS claim, complete the contractor/supplier section of a claim and sign the contractor/supplier declarations.	Contractor or nominated contractor signatory who is authorised to submit GOS claims on the contractor's behalf.
GOS Performer	This role is for ophthalmic performers who need to be able to enter patient details to create a GOS claim, complete the performer section of a claim and sign the performer declaration.	Optometrist (or Ophthalmic Medical Practitioner) who is on the NHS England Ophthalmic Performer List and provides NHS sight tests in the practice.
GOS Claim Manager	This role is for practice staff who need to be able to enter patient details to create a GOS claim, and view and edit all GOS claims within the practice (excluding editing the signed performer and contractor declarations).	Dispensing Optician, Dispensing Assistant, Practice Manager, Admin Staff, Receptionist.
OPH Statement View	This role is for any member of practice staff who only needs to be able to view GOS statements.	Practice Administrator (Finance).
OPH Supplier Signatory (Eng)	This role is for staff who need to be able to enter patient details to create a GOS claim, complete the supplier section of a GOS3 or GOS4 claim and sign the supplier declarations.	Practice Manager, Dispensing Optician or support staff who are involved in the dispensing and collection of glasses.
OPH Head Office	This role is for head office based staff of optical chains who need to be able to view GOS statements for practices in their chain.	Head Office Administrator (Finance)

Additional roles

Please be aware the following may appear on the list of roles for an Ophthalmic User Administrator but these should be ignored:

CET PRT Supervisor

CETPRTClaimant

CETPRTReadOnly

CETPRTClaimManager

OPHCentralOpticalFundStatementView

OPHEyecareTrustStatementView

Users with multiple roles

Please note, it is possible for a user to have more than one role e.g. an optometrist who is both a Performer and a Contractor would be assigned the Contractor Signatory and GOS Performer roles.

Step by step guide to creating PCSE Online Users

1. User Administrator logs into PCSE online.
   Enter email address and password

2. Access the User Management Landing Page

3. Click on "User Management"

4. Click "Create User"

PCSE Online

HOME | **USER MANAGEMENT** | HELP

Create User | Performer Registration | Deactivate User

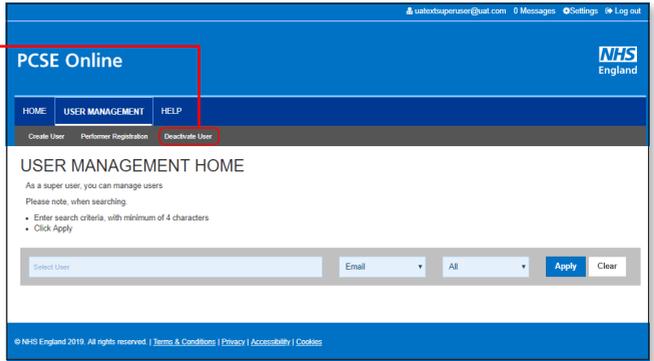### USER MANAGEMENT HOME

As a super user, you can manage users

Please note, when searching.

- Enter search criteria, with minimum of 4 characters
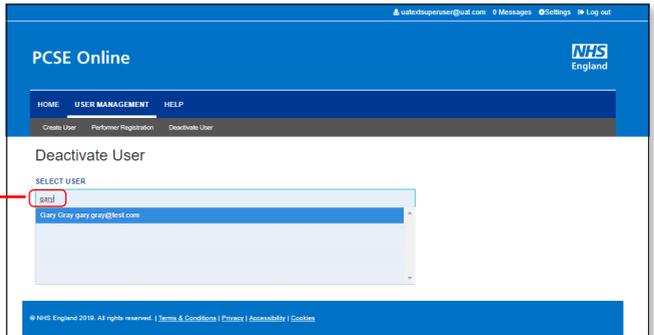- Click Apply

| Select User | | Email ▼ | All ▼ | Apply | Clear |

© NHS England 2019. All rights reserved. | Terms & Conditions | Privacy | Accessibility | Cookies
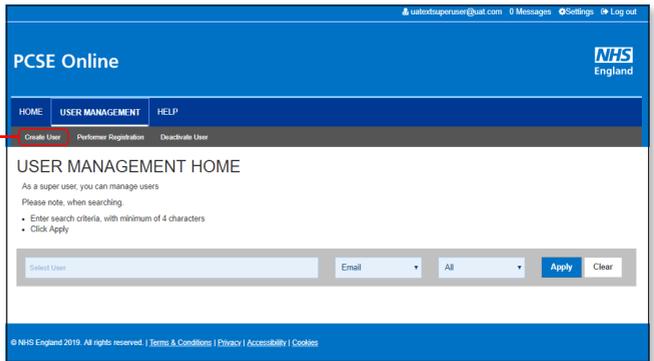
5. Assign user role(s).
   Enter user details and assign role(s). Then click "Submit"

HOME | **USER MANAGEMENT** | HELP

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CREATE NEW USER

| TITLE | FIRST NAMES | SURNAME |
| Mr. ▼ | Gary | Gray |

| EMAIL | TELEPHONE |
| gary.gray@test.com | 01111111111 |

| MOBILE | REQUESTER'S EMAIL |
| 01111111111 | UATextsuperuser@uat.com |

ORGANISATION CODE

England Optho Practice 1

Role	Status
CET PRT Supevisor	☐
ContractorSignatory	☐
OPHStatementView	☐
OPHHeadOffice	☐
OPHCentralOpticalFundStatementView	☐
OPHEyeCareTrustStatementView	☐
OPH Supplier Signatory (Eng)	☐
GOSClaimManager	☐
CETPRTClaimant	☐
CETPRTReadOnly	☐
CETPRTClaimManager	☐
GOSPerformer	☑
GOSReadOnly	☐

Cancel | Create

6. Verify user account.
   Once the user account has been created and role(s) has been assigned, the user will receive an email with a link for them to verify the account and set up a password

Step by step guide to deactivate a PCSE Online User

If a member of staff leaves the practice the User Administrator should terminate their PCSE online user role User

1. Administrator logs into PCSE online.
   Enter email address and password

2. Access the User Management Landing Page
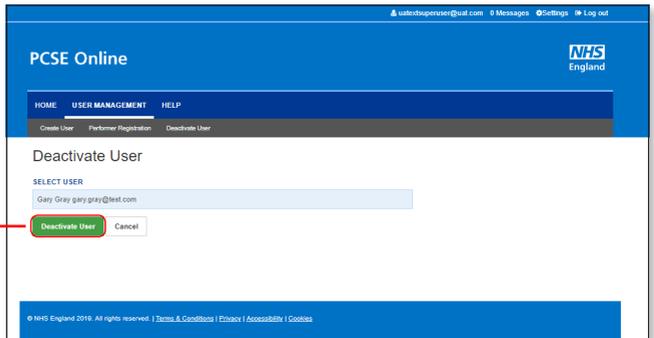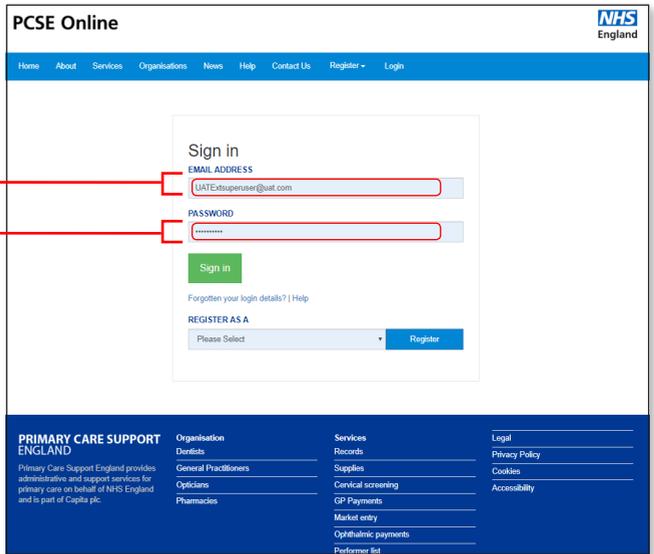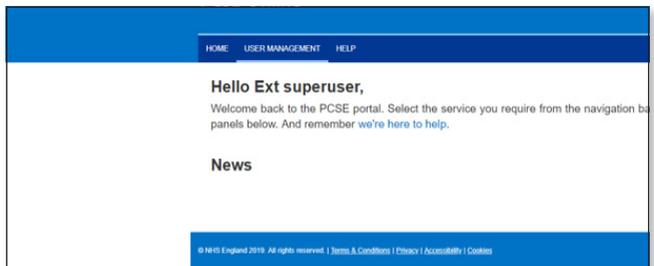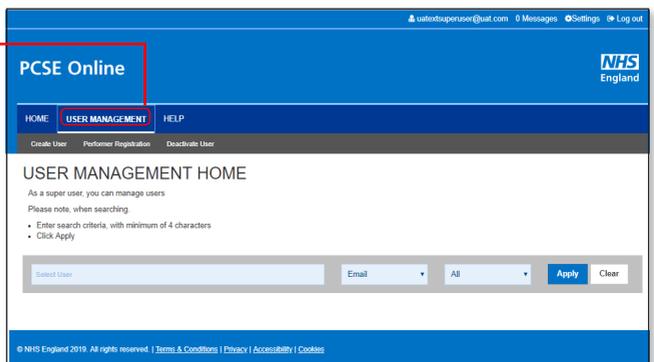

3. Click on "User Management"

4. Click "Deactivate User

5. Enter User Name

6. Check user name and click "Deactivate User"

Step by step guide for editing a PCSE Online user's role(s)

1. User Administrator logs into PCSE online.
   Enter email address and password

2. Access the User Management Landing Page

3. Click on "User Management"

4. Enter User Name and check you have the correct user

5. Tick the box for the appropriate role(s) and click on the update button