



# 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

PCSE Online

Home About Services Organisations News Help Contact Us Register Login

Sign in

EMAIL ADDRESS  
UATExtSupUser@buat.com

PASSWORD  
.....

Sign in

Forgot your login details? | Help

REGISTER AS A  
Please Select Register

PRIMARY CARE SUPPORT ENGLAND  
Primary Care Support England provides administrative and support services for primary care on behalf of NHS England and is part of Copley plc.

Organisation Details  
General Practitioners  
Opticians  
Pharmacies

Services Records  
Stipples  
Cervical screening  
GP Payments  
Market entry  
Cytathatic payments  
Performer list

Legal  
Privacy Policy  
Cookies  
Accessibility

2. Access the User Management Landing Page

PCSE Online

HOME USER MANAGEMENT HELP

Hello Kirsty McManus,  
Welcome back to the PCSE portal. Select the service you require from the navigation bar above or from the summary panels below. And remember [we're here to help](#).

News

© NHS England 2019. All rights reserved | Terms & Conditions | Privacy | Accessibility | Cookies

3. Click on "User Management"

PCSE Online

HOME USER MANAGEMENT HELP

Create User Performer Registration Deactivate User

USER MANAGEMENT HOME

As a super user, you can manage users

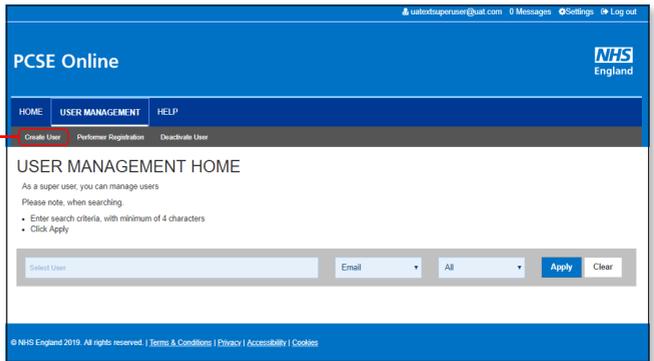
Please note, when searching.

- 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

4. Click "Create User"



5. Assign user role(s).  
Enter user details and assign  
role(s). Then click "Submit"

The screenshot shows the 'CREATE NEW USER' form. It contains several input fields: 'TITLE' (dropdown menu with 'Mr.' selected), 'FIRST NAMES' (text input with 'Gary'), 'SURNAME' (text input with 'Gray'), 'EMAIL' (text input with 'gary.gray@test.com'), 'TELEPHONE' (text input with '0111111111'), 'MOBILE' (text input with '0111111111'), and 'REQUESTER'S EMAIL' (text input with 'UATE:stsuperuser@tst.com'). There is also a field for 'ORGANISATION CODE' with the value 'England Optico Practice 1'. Below these fields is a table of roles with checkboxes for selection:

Role	Status
CET PRT Supervisor	<input type="checkbox"/>
Contractor/Signatory	<input type="checkbox"/>
OPHStatementView	<input type="checkbox"/>
OPHHeadOffice	<input type="checkbox"/>
OPHCentralOpticalFundStatementView	<input type="checkbox"/>
OPHEyeCareTrustStatementView	<input type="checkbox"/>
OPH Supplier Signatory (Eng)	<input type="checkbox"/>
GOSClaimManager	<input type="checkbox"/>
CETPRTClaissant	<input type="checkbox"/>
CETPRTCReadOnly	<input type="checkbox"/>
CETPRTClaissantManager	<input type="checkbox"/>
GOSPerformer	<input checked="" type="checkbox"/>
GOSReadOnly	<input type="checkbox"/>

At the bottom of the form, there are 'Cancel' and 'Create' buttons.

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

PCSE Online

Home About Services Organisations News Help Contact Us Register Login

Sign in

EMAIL ADDRESS  
UATExtSupervisor@uat.com

PASSWORD  
\*\*\*\*\*

Sign in

Forgotten your login details? | Help

REGISTER AS A  
Please Select Register

PRIMARY CARE SUPPORT ENGLAND

Organisation  
Dentists  
General Practitioners  
Opticians  
Pharmacies

Services  
Records  
Supplies  
Cervical screening  
GP Payments  
Market entry  
Ophthalmic payments  
Performer list

Legal  
Privacy Policy  
Cookies  
Accessibility

2. Access the User Management Landing Page

PCSE Online

HOME USER MANAGEMENT HELP

Hello Kirsty McManus,  
Welcome back to the PCSE portal. Select the service you require from the navigation bar above or from the summary panels below. And remember [we're here to help](#).

News

© NHS England 2019. All rights reserved | Terms & Conditions | Privacy | Accessibility | Cookies

3. Click on "User Management"

PCSE Online

HOME USER MANAGEMENT HELP

Create User Performer Registration Deactivate User

USER MANAGEMENT HOME

As a super user, you can manage users

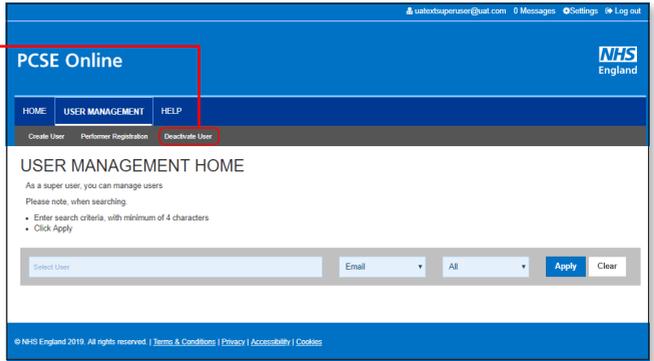
Please note, when searching

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

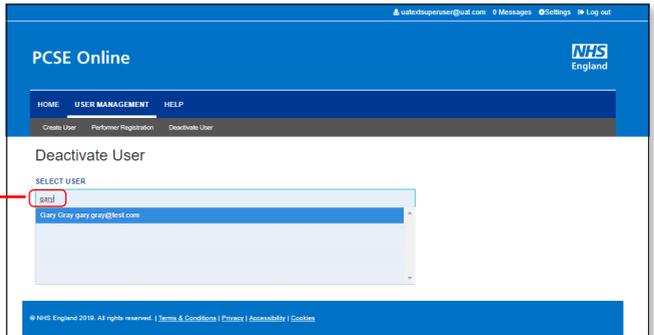
Select User Email All Apply Clear

© NHS England 2019. All rights reserved | Terms & Conditions | Privacy | Accessibility | Cookies

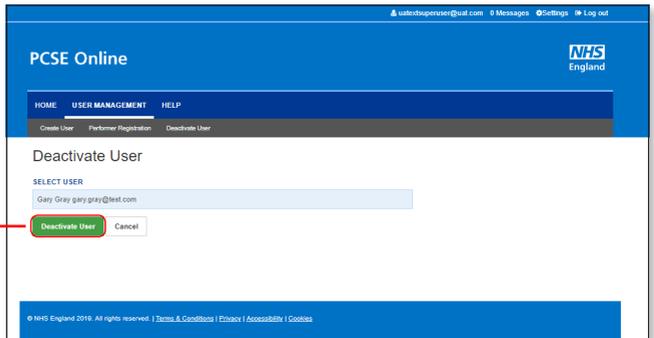
4. Click "Deactivate User"



5. Enter User Name

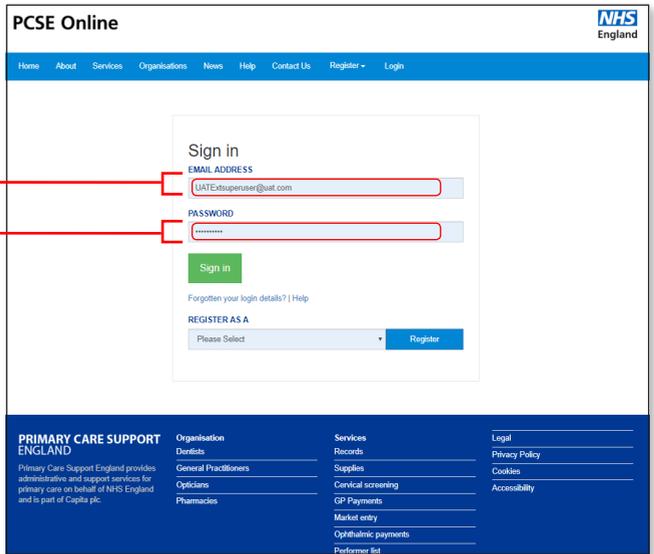


6. Check user name and click "Deactivate User"

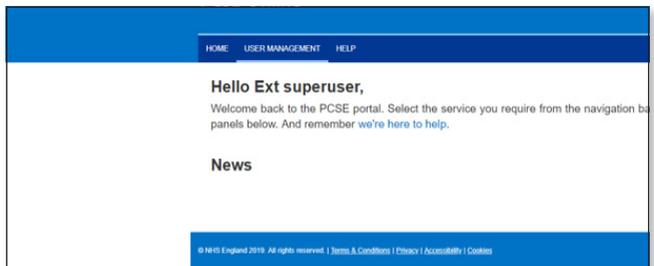


# Step by step guide for editing a PCSE Online user's role(s)

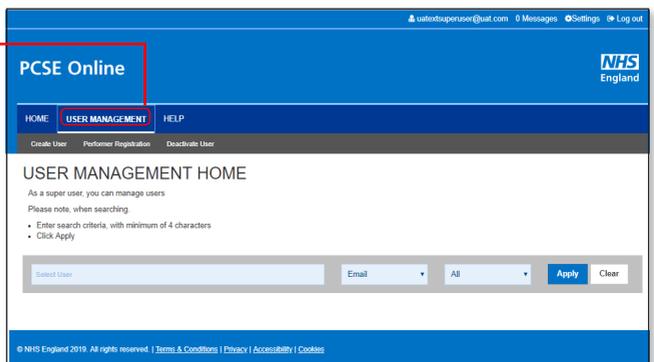
1. User Administrator logs into PCSE online.  
Enter email address and password



2. Access the User Management Landing Page



3. Click on "User Management"



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

The screenshot shows the 'PCSE Online' interface. At the top, there is a navigation bar with 'HOME', 'USER MANAGEMENT', and 'HELP'. Below this, there are links for 'Create User', 'Performer Registration', and 'Deactivate User'. The main heading is 'Deactivate User'. Underneath, there is a 'SELECT USER' section with a search input field containing the text 'gray'. A dropdown menu is visible below the search field, showing a single entry: 'Gray User gray.gray@nhs.uk'. A red box highlights the search input field. At the bottom of the page, there is a footer with the text '© NHS England 2019. All rights reserved | Terms & Conditions | Privacy | Accessibility | Cookies'.

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

The screenshot shows the 'Deactivate User' form. At the top, there is a field for 'ORGANISATION CODE' with the value 'Dummy Ophthalmic Practice ELS'. Below this, there is a table with two columns: 'Role' and 'Status'. The 'Role' column has two entries: 'PL Practice Manager' and 'Performer'. The 'Status' column has two checkboxes, one for each role. A red box highlights the checkboxes. At the bottom left, there is a 'Cancel' button. At the bottom right, there is a green 'Create' button.

Role	Status
PL Practice Manager	<input type="checkbox"/>
Performer	<input type="checkbox"/>