



KLINIK  
HEALTHCARE  
SOLUTIONS

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# Klinik ProUI How to Guide



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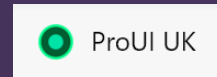


# How to...

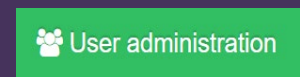
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## Add a New User

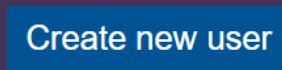
1. Log in to the **Professional User Interface**



2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



3. Select **Create New User**

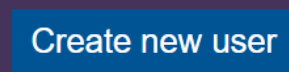


4. Complete all mandatory fields in the box marked with an asterisk \*  
All fields except the user phone number are required.

The **Units** are the teams that we have created for your practice. The units you select at this stage will give the user access and permission to process enquiries within these units.

5. Allocate a **User Role** to grant the appropriate level of rights to the individual.

6. Select **Create New User** to save the account.



The User will then receive an automatic activation email from a Klinik no-reply email address to set up their account.

# Frequently Asked Questions

**Q:** How do I know which User Role to select?

**A:** If you hover over the Information Icon, an explanation of the permissions you are granting will be displayed.



For example, a Standard User will have access and visibility of the patient cases listings, (as determined and set by a Super User) and Connect (the telephone tool), but they will not have access to the Dashboard or User Administration function.

**Q:** What should I do if my users job role is not listed in the drop down?

**A:** This list is standard across all our Klinik practices and is as concise as possible to avoid a user having to scroll and search. If possible, please use a similar job role, but if not please select **Other**.

You can of course use the Send Feedback feature if you feel that an additional job role is necessary.

A rectangular button with a white background and a dark border. It contains a dark envelope icon followed by the text "Send feedback".

**Q:** A new user cannot activate their account, why is this?

**A:** The user will need to activate the link sent to their email account within 14 days, otherwise this will expire, and you will need to delete and then recreate the account.

**Q:** I need to create an account for a user who already has a Klinik account at another site, what should I do?

**A:** Please refer to our '**How to... Create a multi-user account**'

## How to...



# Remove a User Account or Amend Access Rights

1. Log in to the **Professional User Interface**



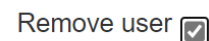
2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



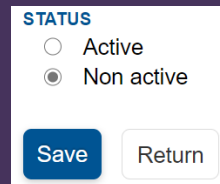
3. Search for the User Account you wish to remove or amend.

4. Left click on the username and the Edit user information box will appear.

5. Select Remove User in the bottom right-hand corner of the box if you wish to remove the account completely.



6. You can also amend rights to units, change the users access type rights, e.g standard user etc or make the account in active- if the user is on long-term sick for example and then active again when they return to work.



STATUS

Active

Non active

Save Return

7. Once you have completed any of the above actions you then select Save to complete the action and the user will no longer be able to access their account, or their access rights will have changed.

Save

## Frequently Asked Questions

**Q:** For what reason do I need to remove a user?

**A:** You should remove a user who leaves your practice or a user who no longer requires access to the ProUI. Practice Super Users hold responsibility for keeping their practice user access rights up to date.

**Q:** What should I do if a User is on sick leave or a long period of absence?

**A:** You can make a user inactivate by following the steps above to make their account inactive.

**Q:** What if I delete the account in error?

**A:** You simply need to recreate the account. You can follow our '**How to... Create a New User**' for support.

**Q:** Do I need to notify you if I remove a user account?

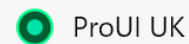
**A:** No, we do not need to know, but if you need any support or advice, please do not hesitate to contact us.

## How to...



# Unable to log into ProUI

You can access ProUI here <https://proui.klinik.co.uk/>



### Accessing your account.

1. You will only be able to log into **ProUI** to view patient enquiries if you have been given authority to do so by one of your designated practice **Super Users**.
2. If an account has been created for you, you will have received a link to activate your account from [no-reply@klinik.co.uk](mailto:no-reply@klinik.co.uk)
3. If more than 2 weeks has passed since this link was created it will have expired and you will then need to approach a **Super User** to delete and re-add your account for you.

### Forgotten Password

4. If you cannot access **ProUI** because you have forgotten your password, you can re-set this using the '**forgot your password**' link. To see further detail and a step by step by step process please refer to '**How to... Reset your Password**'.

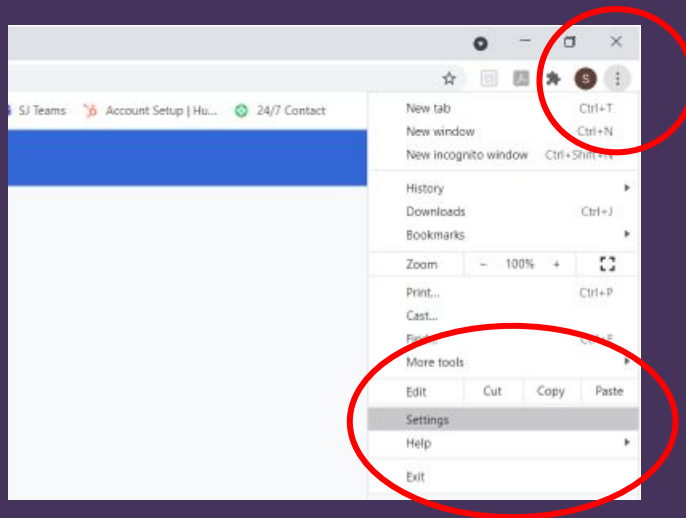
Please log in

[Forgot your password?](#)

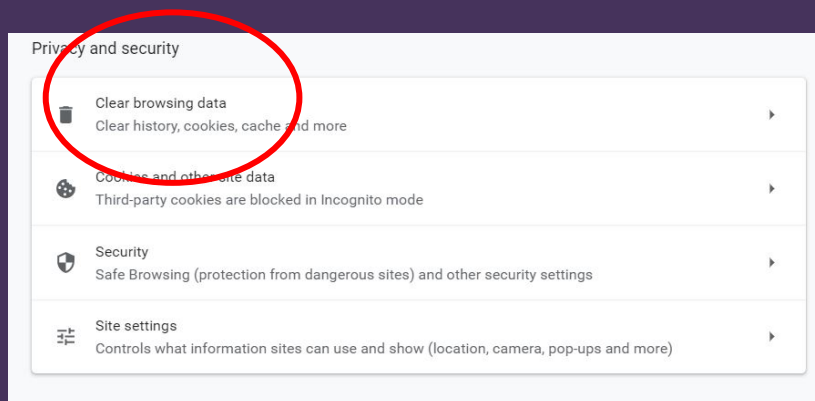


## Browser Settings

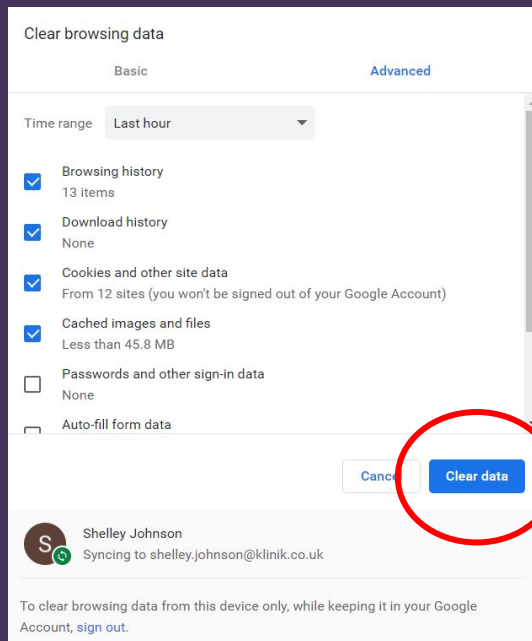
5. If you have an authorised log in and know your password and are still unable to log into **ProUI**, or it does not load correctly please take the following steps:
  - a) Log out of ProUI
  - b) Clear your browser history by going to 'Settings' by using the drop down under the three white dots to the right of your browser search bar.



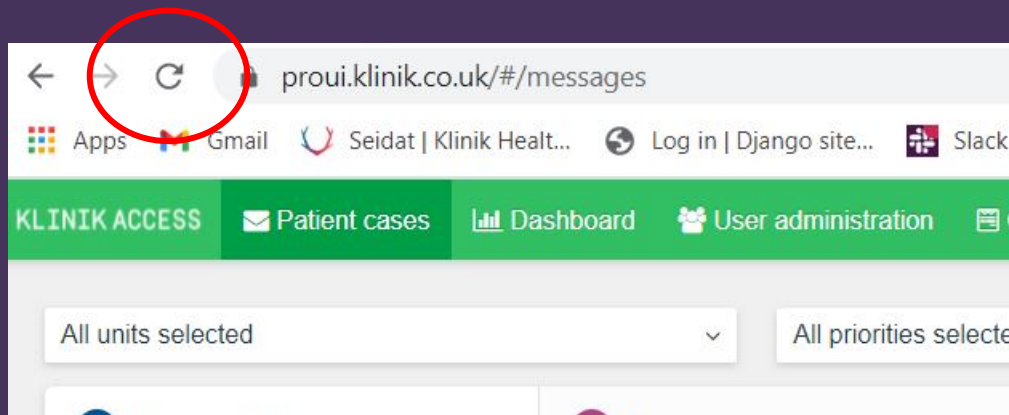
- c) Go to 'Privacy & Settings' and select 'Clear Browsing data'.



d) Then select 'clear data'



6. Then log back into **ProUI** and ensure you refresh your browser as below or select 'Ctrl shift R'



## Frequently Asked Questions

**Q:** What do I do if I haven't received a link to log into **ProUI**?

**A:** Please approach one of your practice **Super Users** who will be able to resolve this for you.

**Q:** What if I have carried out all steps above and I still can't access the **ProUI**?

**A:** Please refer to your **Super users** in the first instance who will try to resolve the issue for you. If they cannot resolve the issue they can refer to our IT support team for further help.

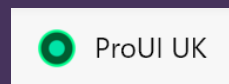


## How to...

# Reset your Password

Should you forget your password please complete the following steps.

1. Open the **ProUI**



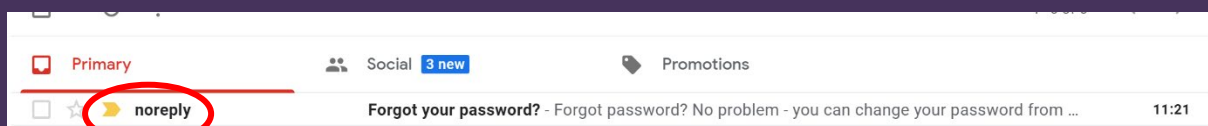
2. Select the **Forgot your password?** link.

A screenshot of a login form titled "Please log in" in green. It contains two input fields: the first contains the email address "hannah.snelson@klinik.co.uk" and the second is labeled "Password". Below the fields are two buttons: a blue "Log in" button and a blue link "Forgot your password?" which is circled in red.

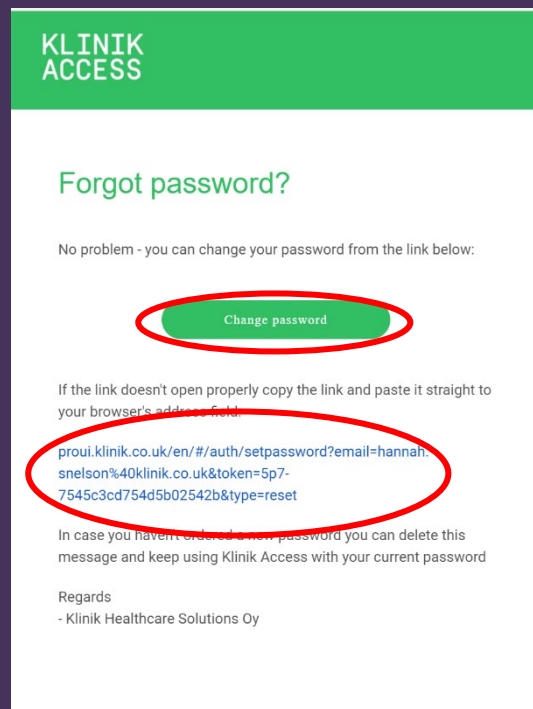
3. Insert your NHS (or professional) email address into the field provided.

A screenshot of a "Renew password" form. The title "Renew password" is circled in red. It features an "Email" input field and a blue "Send" button. A link "Back to log in screen" is located at the bottom right.

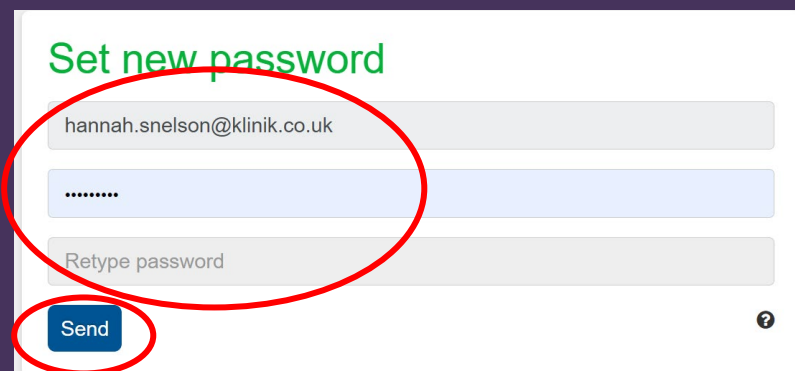
4. Select **Send**
5. Go to your email account e.g., NHS Email account
6. Open the email received from the [no-reply@klinik.co.uk](mailto:no-reply@klinik.co.uk)



7. Select **the Change password** link or copy and paste the link in the email into your browser address field.

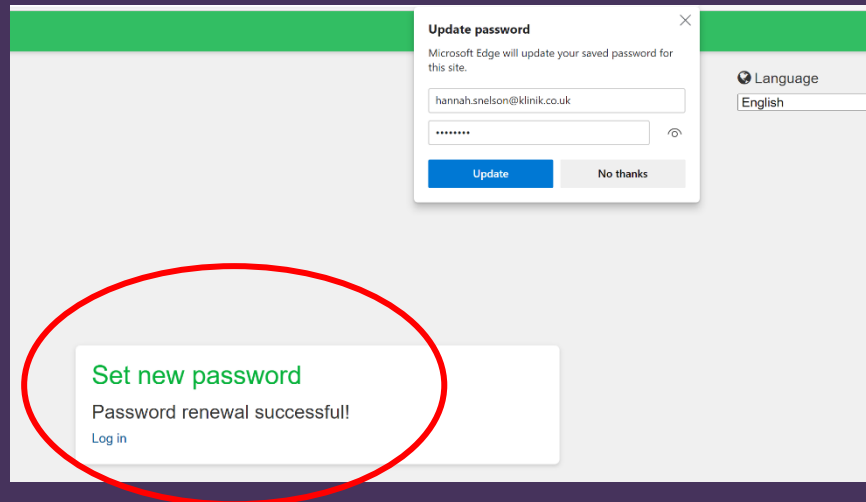


8. You will then be required to **Set new password, Re-type password** and then press **Send**.



9. Your password must be at least 8 characters long and contain both lower and uppercase letters and numbers.

10. You will then be notified that the password renewal has been successful, and you can then update your saved passwords if you wish to do so.



## Frequently Asked Questions

**Q:** Can I reset someone else's password for them?

**A:** You can complete steps 1-4 above for another user, but they are required to create their own password and this information should not be shared.

**Q:** I have tried to reset my password but it failed, why?

**A:** Please ensure you have completed the above steps and if you continue to have problems speak to your Super User. A practice Super User can remove your account and recreate it if necessary. If you require further support please contact [I.T.Support@klinik.co.uk](mailto:I.T.Support@klinik.co.uk)

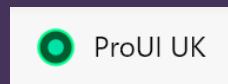
## How to...



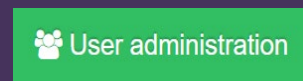
# Create a Multi-site User Account

The following steps should be taken if you wish to create a user who already has an account with another Klinik practice.

1. Log in to the **Professional User Interface**



2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



3. Select **Create New User**

Create new user

4. Complete all mandatory fields in the box marked with an asterisk \*

All fields except the user phone number is required.

The **Units** are the teams that we have created for your practice. The units you select at this stage will give the user access and permission to process to these enquiries.

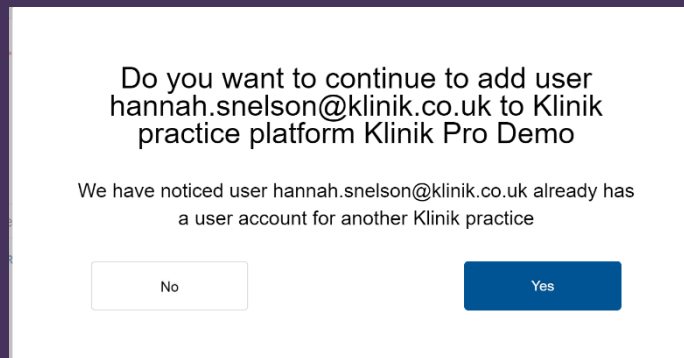
5. Allocate a **User Role** to grant the appropriate level of rights to the individual.



6. Select **Create New User** to save the account.

Create new user

7. You will then receive a notification box advising that the User has another Klinik account. If you wish to proceed, select **Yes**.



8. Once you have selected Yes, the user will then be able to access the additional Klinik ProUI you have granted them access to.

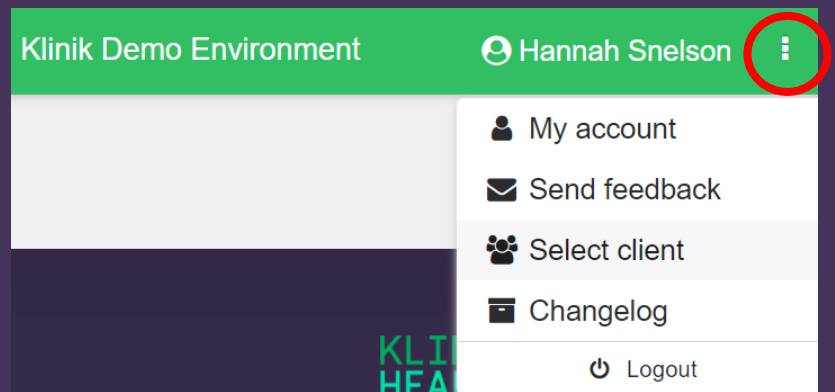
If a user has access to more than one practice, they can switch between practices using the following steps:

1. Log into the **Professional User Interface**

ProUI UK

2. Within the interface, select the three dots in top right-hand corner.

3. Choose **Select Client**



4. The User should then select the required practice from the list that populates.

The user should be aware that when logging into ProUI, the patient listing will default to the last practice viewed and so the user should always check the relevant practice name is displaying on the upper green bar of the interface before proceeding to manage any patient enquiries.

## Frequently Asked Questions

**Q:** If I grant access rights to a user from another practice what can they see?

**A:** The access level rights and units you have ticket will allow the user to migrate through your practice platform in exactly the same way as any other user.

**Q:** What happens if the user no longer needs to see my practice patient data?

**A:** Practice Super Users are responsible for ensuring user rights and access to the ProUI remain up to date. Users that no longer need access should simply be removed in User Administration. (see **How to.... Remove a User Account or Amend Access Rights**)

**Q:** Why would I need to grant a user from another practice access to my practice Klinik ProUI?

**A:** This is designed to facilitate the sharing of resources across your PCN where required.



## How to...

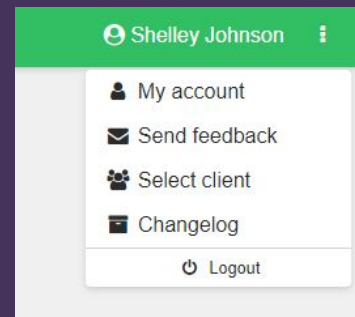
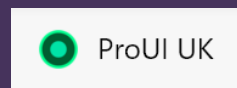


# Switch Klinik Practice Patient Lists

If you have been given access to the patient lists for another practice within your PCN which uses Klinik you will be able to access both platforms from within **ProUI**.

To switch to another practice platform, complete the following steps:

1. Log in to the Professional User Interface
2. Select the **three white dots** on the upper green bar of **ProUI**.
3. Then select **Client** from the drop down menu.



4. Then you will see a list of the practice platforms available to you on the left hand side of the screen. Select the practice that you wish to view from the options available under the messaging.

To switch to another practice:

1. Select the practice from the left hand column list
2. Select the units you wish to view
3. Press the 'Save' button
4. \* IMPORTANT\* Confirm the practice name has changed to the one you wish to view on the upper green bar before navigating to the patient list. **NB- the practice you selected when last logged into ProUI will automatically appear when you next log in so it's important that you check the correct practice name is displayed before accessing the patient list.**

Klinik Pro Demo

5. It's important to remember that the default interface when next logging into Klinik will always be the last one viewed so a check should be made each time to ensure the correct practice name is displayed on the upper green bar as in the following example.

The screenshot shows the Klinik Pro Demo interface. At the top, a green header bar displays "Klinik Demo Environment" on the left and "Shelley Johnson" on the right. Below the header, the main content area is divided into three sections: "Unhandled patient cases" with a blue button showing "55" and "Show only unhandled patient cases"; "Urgent patient cases" with an orange button showing "38" and "Show only urgent patient cases"; and "Unhandled messages" with a green checkmark icon and the text "There are no unhandled messages". At the bottom of the main content area, there is a grey button labeled "Show all patient cases". A large green arrow points from the text above to the top of the interface.

6. If you are still experiencing a problem, please firstly ensure you are using **Google Chrome** as your default browser, **clear your browser cache** and log out and back into all programmes. Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).

## Frequently Asked Questions

**Q:** Why would I need to see another practice interface

**A:** Another practice within your PCN may have granted you access to assist with workloads and promote collaborative working.

**Q:** If I leave my employer do I need to advise them that I have access to another **Klinik platform?**

**A:** Whilst your practice super users should check this, it is good practice to inform them as your account will need to be removed for all Klinik platforms separately.



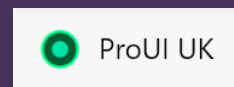
# How to...



## D.O.B not showing in ProUI

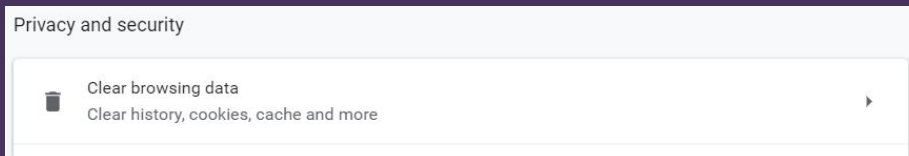
If a patient D.O.B is showing as 'invalid' in **ProUI** you should complete the following steps:

1. Log out of the Professional User Interface

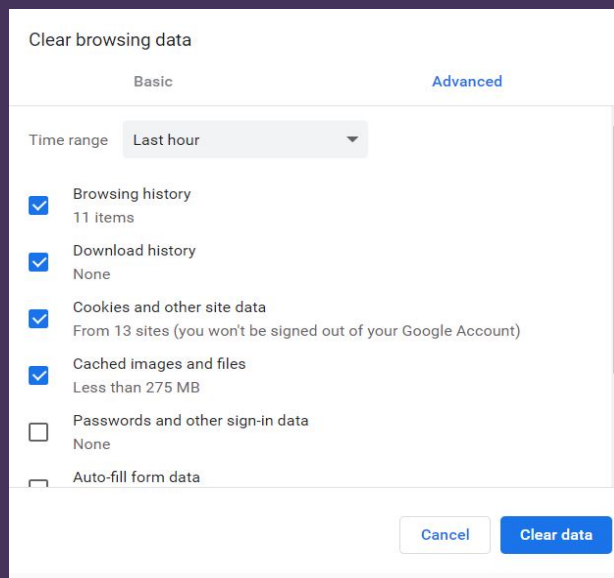


2. Select **Settings** or this may be called **Customise and Control** (three dots) to the right of the URL browser bar.

3. Scroll to **Privacy & security**, then select **Clear browsing data**.



4. Then select **clear data** to clear the search history and previous versions of ProUI.



- Log back into ProUI and refresh the page. The D.O.B. will then appear in the correct format in each patient enquiry.

The screenshot shows the ProUI web application interface. The browser address bar shows the URL 'proi.klinik.co.uk/#/messages'. A red circle highlights the refresh button in the browser's navigation bar. The application header includes 'KLINIK ACCESS' and navigation tabs for 'Patient cases', 'Dashboard', 'User administration', 'Connect', and 'Instructions'. Below the header, there are filters for 'All units selected' and 'All priorities selected', along with a search bar. The main content area displays a table of patient messages with columns for 'ARRIVED', 'PATIENT / CASE', 'SUBJECT', and 'UNIT'. The table lists various patient enquiries with their arrival times, names, subjects, and units.

ARRIVED	PATIENT / CASE	SUBJECT	UNIT
Time 15:57	Andrew Thomas	Long-term condition review	Nursing/HCA Marlow
Time 15:56	Alan Harris	Blood Tests	Nursing/HCA Marlow
Time 15:51	Julia Miles-griffiths	Family Planning/Contraception	RAC
Time 15:48	Eve Kitchen	Urgent appointment	RAC
Time 15:47	Andrew Moynihan	Routine appointment request	GP Lane End
Time 15:43	Ronnie Murphy	Children's Immunisations	Nursing/HCA Marlow
Time 15:39	David Bone	Routine appointment request	GP Lane End
Time 15:35	Sarah Butler	Follow up appt	Reception Marlow
Time 15:35	Bushra Birchall	Urgent appointment	RAC
Time 15:33	Pamela (Mrs.) SPICKSLEY	Submit Information	GP Marlow
Time 15:32	Leeza Johnson	Submit Information	Reception Marlow
Time 15:23	Graeme Coole	Urgent appointment	RAC
Time 15:23	Christine Swinburn	Prescription Queries	Pharmacy

- Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).



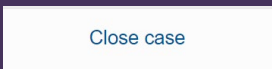
## How to...



# Close a Case in the ProUI

You should only close a case that has been triaged and managed appropriately in line with your agreed practice procedures. If you require support or advice, please seek assistance from your Practice Super User(s).

1. Once you have processed a case and there is no further action required, you can then close the record in the Professional Interface. However you first must ensure you copy the enquiry from Klinik into the patient's clinical record. (see **How to..... Copy text from ProUI and Connect**)
2. In order to close an enquiry the case must be moved to **'In progress'**
3. Select **Close Case** at the top of the patient enquiry form.



4. You will then be asked to provide your own judgement of the urgency of the need for care for cases that have the algorithm attached. If you are a non-clinician we recommend you validate the urgency recommendation provided by the algorithm.

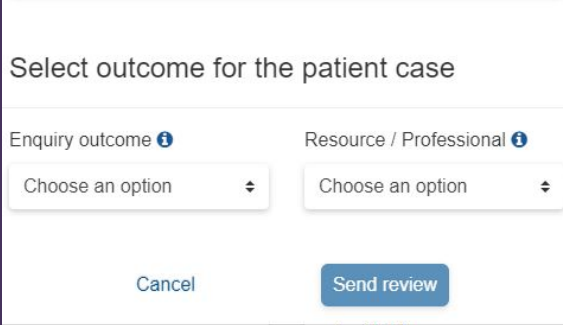
Give your own estimate

Give your own judgment on the urgency of the need for care

The evaluation of the system: **Non-urgent need for care**

	<b>Emergency</b> (Immediate need for care)
	<b>Urgent</b> (Need for care in 1-2 days)
	<b>Non-urgent need for care</b>
	<b>Non-urgent or suitable for self-care</b>

5. For all enquiry types you will also be asked to select the **Enquiry outcome** and **Resource outcome**. This should summarise how the patient enquiry was dealt with and which type of resource dealt with the enquiry. Note this should not be the resource that closed the enquiry.



The screenshot shows a web form titled "Select outcome for the patient case". It contains two dropdown menus: "Enquiry outcome" and "Resource / Professional". Both dropdowns currently display "Choose an option" with a downward arrow. Below the dropdowns are two buttons: "Cancel" and "Send review".

## Frequently Asked Questions

**Q:** Why do I need to provide my own evaluation of the urgency of a patient enquiry?

**A:** We use this information at Klinik to validate our urgency detection categories.

**Q:** What if I close a case in error?

**A:** You can select the archive tab, and search for the case using the **search button**, select it by left clicking the enquiry in the list, then select **Return in progress** and the enquiry will be moved back to the **New patient cases** list where you can access and progress the enquiry.

## How to...



# Copy Text from ProUI and Connect

Once you have processed a case and there is no further action required, you need to copy the enquiry from Klinik into the patient's clinical record. Below are the instructions on how to do this from both the **ProUI** and **Connect**.

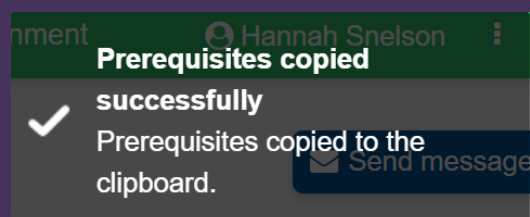
## ProUI

1. Within ProUI, once a patient enquiry has been moved to 'In progress' you must always ensure you copy the enquiry form into the patient health record before closing the enquiry in Klinik.
2. On the right-hand side of the screen inside the body of the enquiry form, beside **Prerequisite information** select **Copy**.



Prerequisite information  Copy

3. A black box will then appear advising the copy has been successful.



4. Alternatively, you can highlight the information and press **Ctrl and C** (Copy) on your keyboard.
5. You then need to paste the information into the correct patient's clinical record using **Ctrl and V** on your keyboard.

## Connect

You are only required to copy the enquiry from **Connect** into the patient Clinical record if you are closing the case and not directing it to a unit within **ProUI**. If you are unsure, please see **How to... Close a Case in Connect for more information**.

1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



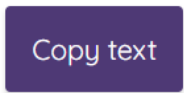
SUMMARY

2. You should only then select **Case Close** if there is no further action required and the enquiry does not need to be triaged as this will send the enquiry to the archive and it will not be seen in ProUI.



Case close ›

3. Once you have selected **Case Close** you will then be required to copy the text into the patient's Clinical record. Select **Copy text**.



Copy text

4. Alternatively, you can highlight the required text and press Ctrl and C (Copy) on your keyboard.
5. You are then able to paste the information into the correct patient's clinical record using **Ctrl and V** on your keyboard.

## Important!

- Please be aware that if the copy function is selected and the patient enquiry stored on the clipboard is not immediately pasted into the clinical record, there is a risk that a patient enquiry could be pasted into the wrong clinical record, as the clipboard will store the last copied enquiry.
- It is therefore essential that each time you copy a record you review the pasted information to ensure it has been added to the correct patient's clinical record.
- Please ensure all clinical information related to the patient enquiry is copied over. The copy function will only include the information that the patient has recorded. If you use Klinik to record treatment notes or comments or send the patient an SMS these records will not appear in the clinical record unless you copy these over separately.
- SMS messages and comments added to each patient enquiry can separately be copied into the clinical record, but the same care should be taken to ensure on each occasion the correct information has been pasted into the correct record.
- We recommend that once all the information has been copied over from ProUI, and the enquiry is ready to be closed that both records are closed at the same time.

## Frequently Asked Questions

**Q:** I have completed the steps you have advised, but the information is not pasting into the clinical record. Why?

**A:** Please ensure you are using Google Chrome as your default browser for a better experience. Please delete your browsing cache and log out and back into all systems before trying again. If you continue to experience problems once you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk)



## How to...



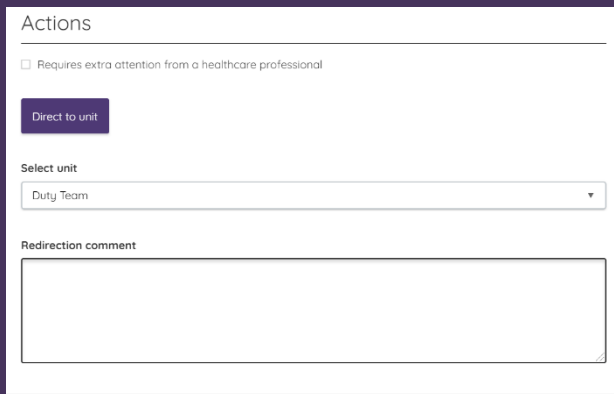
# Direct a Case to a Unit in Connect

1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



SUMMARY

2. At the bottom of the **Summary** page, you can select **Direct to unit**, to send the enquiry to appropriate team within your practice.
3. You will be required to select the appropriate unit from a drop-down list, and you can add a **Redirection comment** below if you choose.



Actions

Requires extra attention from a healthcare professional

Direct to unit

Select unit

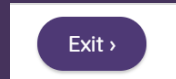
Duty Team

Redirection comment

4. You can now select **Submit** to direct the enquiry to the chosen unit within the **Professional User Interface**.



5. There is no requirement for you to **Copy text** at this stage as you can copy the information from the ProUI once the case has been triaged and processed. Here you should press **Exit** to return to the **Connect** platform.



## Frequently Asked Questions

**Q:** What should I do if I direct the case to the wrong unit?

**A:** If you have access to the unit which you have initially directed the case to within the **ProUI**, you can here **Direct to another unit** if necessary. If you do not have access to the unit, you can contact a Super User to action this for you, or if the person triaging feels it is inappropriate for their team, they can redirect the case.

**Q:** What if the case does not need triaging and is suitable for closure?

**A:** Please see **How to... Close a Case in Connect** for guidance.

# How to...



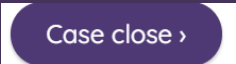
## Close a Case in Connect

You should only close a case in Connect that requires **no further action**. All cases that are closed within Connect will be directed to the Archive. If you require support with this, or you are unsure, please seek assistance from your Practice Super User(s) before closing the case.

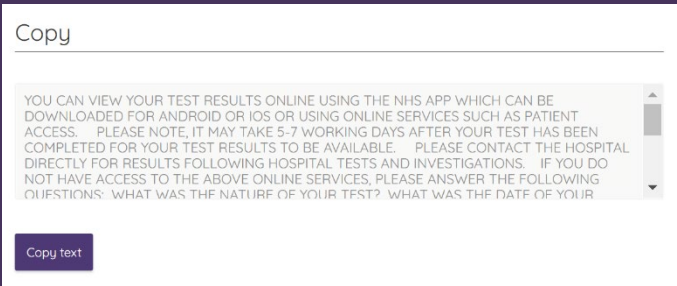
1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



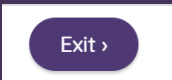
2. You should only then select **Case Close** if there is no further action required and the enquiry does not need to be triaged.



3. Once you have selected **Case Close** you will then be required to Copy the text into the patient's Clinical record. Please see **How to...Copy Text** for further guidance if required.



4. Once you have copied the text into the Clinical record you can now press **Exit**, and this will return you to the Connect platform.



## Frequently Asked Questions

**Q:** When should I be closing a case in Connect?

**A:** This is entirely down to your practice procedures and some practices may wish to triage all enquiries. We suggest that the **Case close** button should only be used for cases that require no further action. An example of this may be a patient who is calling to find out their recent test result. Once the call-handler has given the patient this result (in line with internal procedures) the case may be suitable for closing as it does not then require triaging by a Clinician or an appointment. Please refer to your practice management if you are unsure if you can close a case in Connect.

**Q:** What should I do if I press **Case Close** by mistake?

**A:** The case will be directed to the **Archive** in the **ProUI**. You can select the case and return it to **In progress** which will then send the enquiry to the **New patient cases listing**. Here you can **Add a comment** or **Direct to another unit** if appropriate.

**Q:** How do I direct a case to a unit within **Connect**?

**A:** Please see **How to... Direct a Case in Connect** for guidance.

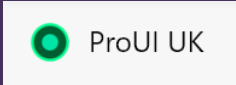
# How to...



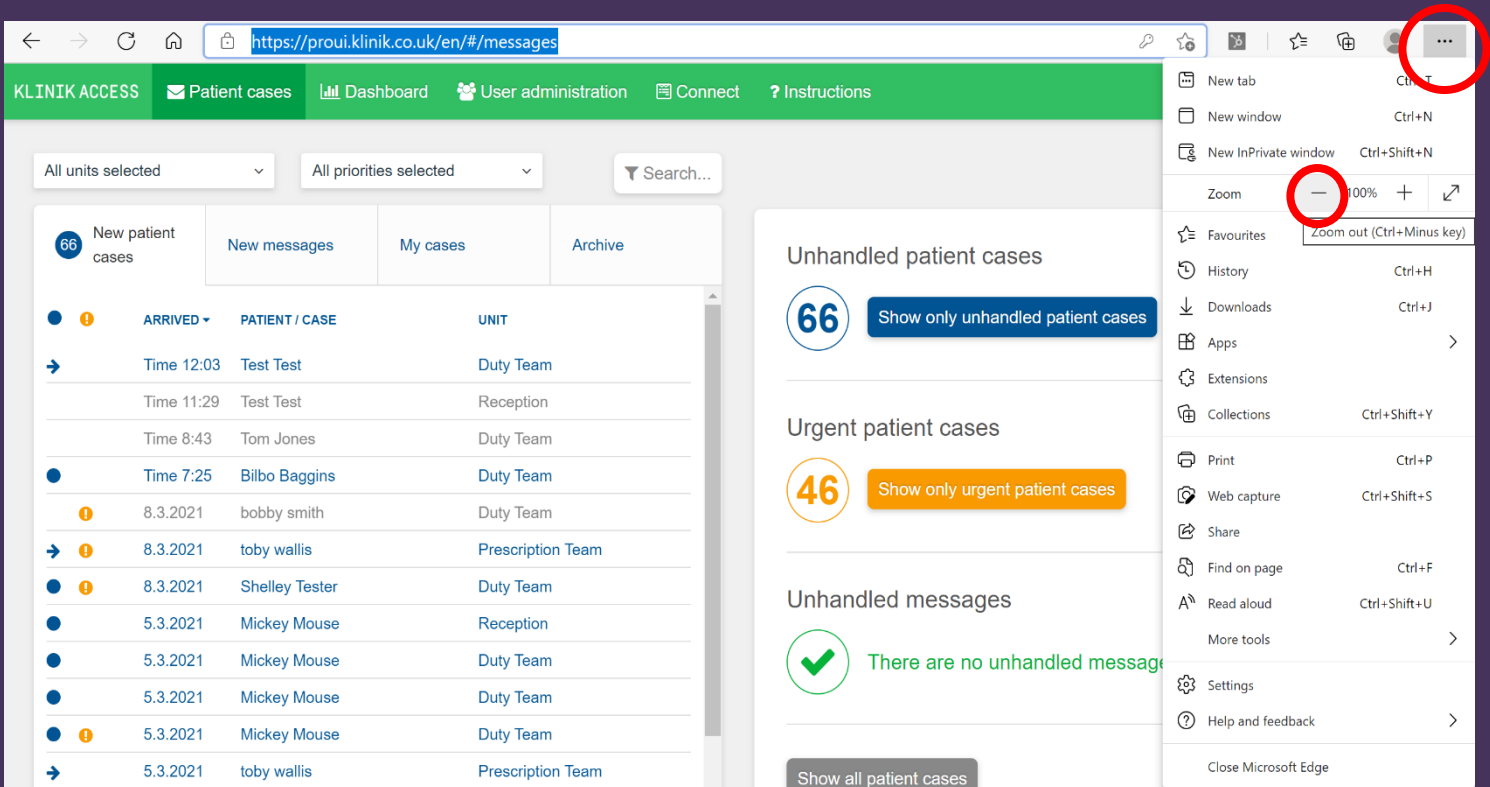
## Adjust your Screen Resolution

If you cannot see the practice name on the upper green bar of the professional interface and/or the patient list view as you normally can please take the following steps.

1. Log out of the Professional User Interface



2. Select **Settings** or this may be called **Customise and Control** (three dots) to the right of the URL browser bar.



3. The **Subject** heading and the Practice Name should now be visible.
4. If you are still experiencing a problem, please firstly ensure you are using **Google Chrome** as your default browser, **clear your browser cache** and log out and back into all programmes. Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).



## How To...

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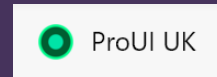


# How to...

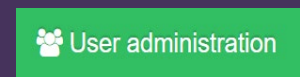
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## Add a New User

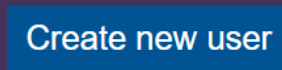
1. Log in to the **Professional User Interface**



2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



3. Select **Create New User**

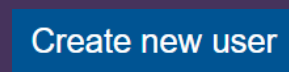


4. Complete all mandatory fields in the box marked with an asterisk \*  
All fields except the user phone number are required.

The **Units** are the teams that we have created for your practice. The units you select at this stage will give the user access and permission to process enquiries within these units.

5. Allocate a **User Role** to grant the appropriate level of rights to the individual.

6. Select **Create New User** to save the account.



The User will then receive an automatic activation email from a Klinik no-reply email address to set up their account.

# Frequently Asked Questions

**Q:** How do I know which User Role to select?

**A:** If you hover over the Information Icon, an explanation of the permissions you are granting will be displayed.



For example, a Standard User will have access and visibility of the patient cases listings, (as determined and set by a Super User) and Connect (the telephone tool), but they will not have access to the Dashboard or User Administration function.

**Q:** What should I do if my users job role is not listed in the drop down?

**A:** This list is standard across all our Klinik practices and is as concise as possible to avoid a user having to scroll and search. If possible, please use a similar job role, but if not please select **Other**.

You can of course use the Send Feedback feature if you feel that an additional job role is necessary.

Send feedback

**Q:** A new user cannot activate their account, why is this?

**A:** The user will need to activate the link sent to their email account within 14 days, otherwise this will expire, and you will need to delete and then recreate the account.

**Q:** I need to create an account for a user who already has a Klinik account at another site, what should I do?

**A:** Please refer to our '**How to... Create a multi-user account**'

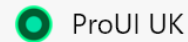
## How to...



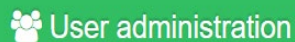


# Remove a User Account or Amend Access Rights

1. Log in to the **Professional User Interface**



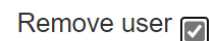
2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



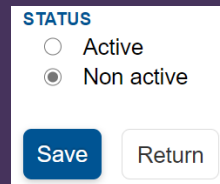
3. Search for the User Account you wish to remove or amend.

4. Left click on the username and the Edit user information box will appear.

5. Select Remove User in the bottom right-hand corner of the box if you wish to remove the account completely.



6. You can also amend rights to units, change the users access type rights, e.g standard user etc or make the account in active- if the user is on long-term sick for example and then active again when they return to work.



STATUS

Active

Non active

Save Return

7. Once you have completed any of the above actions you then select Save to complete the action and the user will no longer be able to access their account, or their access rights will have changed.

Save

## Frequently Asked Questions

**Q:** For what reason do I need to remove a user?

**A:** You should remove a user who leaves your practice or a user who no longer requires access to the ProUI. Practice Super Users hold responsibility for keeping their practice user access rights up to date.

**Q:** What should I do if a User is on sick leave or a long period of absence?

**A:** You can make a user inactivate by following the steps above to make their account inactive.

**Q:** What if I delete the account in error?

**A:** You simply need to recreate the account. You can follow our '**How to... Create a New User**' for support.

**Q:** Do I need to notify you if I remove a user account?

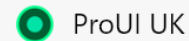
**A:** No, we do not need to know, but if you need any support or advice, please do not hesitate to contact us.

## How to...



# Unable to log into ProUI

You can access ProUI here <https://proui.klinik.co.uk/>



### Accessing your account.

1. You will only be able to log into **ProUI** to view patient enquiries if you have been given authority to do so by one of your designated practice **Super Users**.
2. If an account has been created for you, you will have received a link to activate your account from [no-reply@klinik.co.uk](mailto:no-reply@klinik.co.uk)
3. If more than 2 weeks has passed since this link was created it will have expired and you will then need to approach a **Super User** to delete and re-add your account for you.

### Forgotten Password

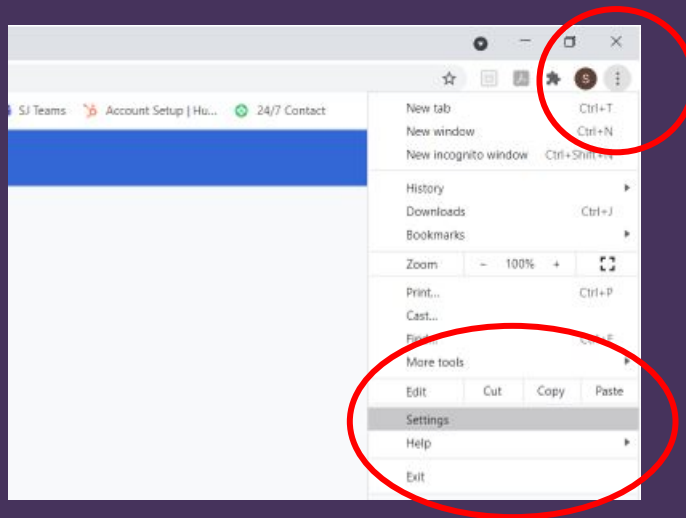
4. If you cannot access **ProUI** because you have forgotten your password, you can re-set this using the '**forgot your password**' link. To see further detail and a step by step by step process please refer to '**How to... Reset your Password**'.

Please log in

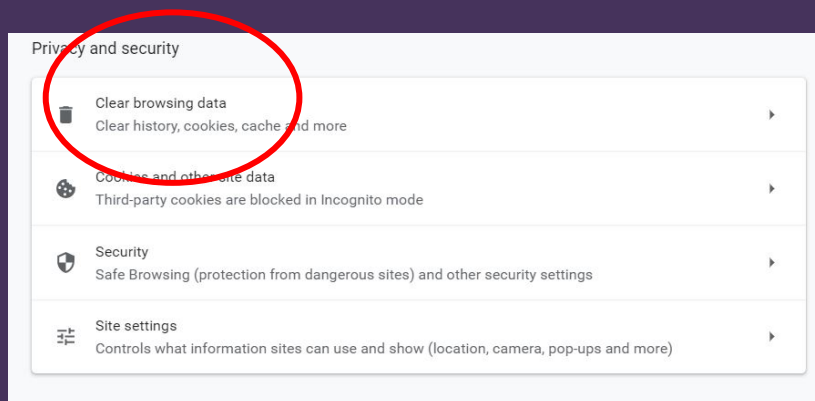
[Forgot your password?](#)

## Browser Settings

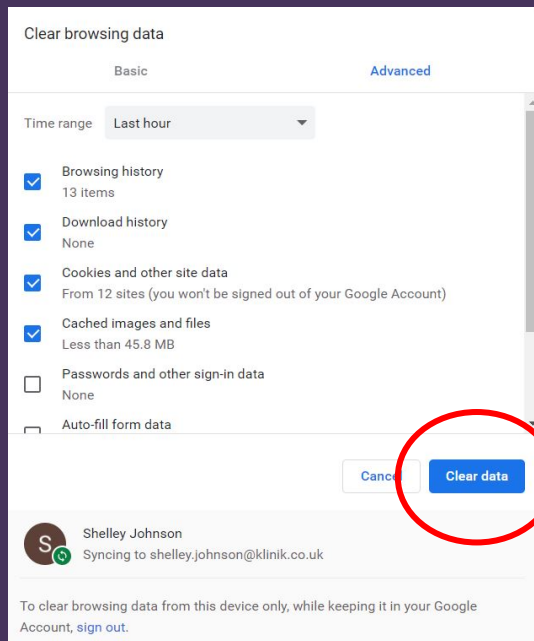
5. If you have an authorised log in and know your password and are still unable to log into **ProUI**, or it does not load correctly please take the following steps:
  - a) Log out of ProUI
  - b) Clear your browser history by going to 'Settings' by using the drop down under the three white dots to the right of your browser search bar.



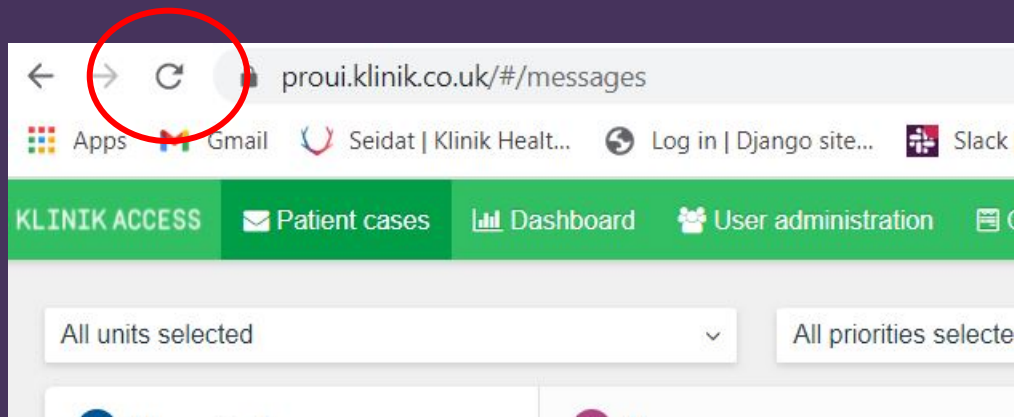
- c) Go to 'Privacy & Settings' and select 'Clear Browsing data'.



d) Then select 'clear data'



6. Then log back into **ProUI** and ensure you refresh your browser as below or select 'Ctrl shift R'



## Frequently Asked Questions

**Q:** What do I do if I haven't received a link to log into **ProUI**?

**A:** Please approach one of your practice **Super Users** who will be able to resolve this for you.

**Q:** What if I have carried out all steps above and I still can't access the **ProUI**?

**A:** Please refer to your **Super users** in the first instance who will try to resolve the issue for you. If they cannot resolve the issue they can refer to our IT support team for further help.

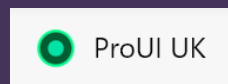


## How to...

# Reset your Password

Should you forget your password please complete the following steps.

1. Open the **ProUI**



2. Select the **Forgot your password?** link.

A screenshot of the "Please log in" form. It has a title "Please log in" in green. Below the title is a text input field containing the email address "hannah.snelson@klinik.co.uk". Underneath is a "Password" input field. At the bottom left is a blue "Log in" button, and at the bottom right is a blue link labeled "Forgot your password?". The link is circled in red.

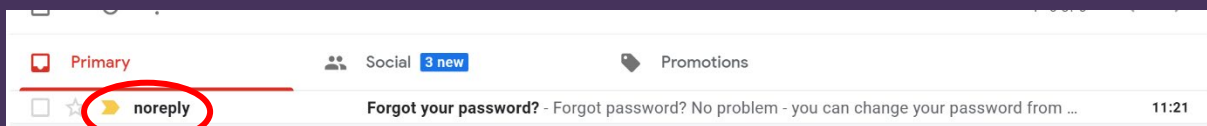
3. Insert your NHS (or professional) email address into the field provided.

A screenshot of the "Renew password" form. The title "Renew password" is in green and circled in red. Below the title is an "Email" input field. At the bottom left is a blue "Send" button, and at the bottom right is a blue link labeled "Back to log in screen".

4. Select **Send**

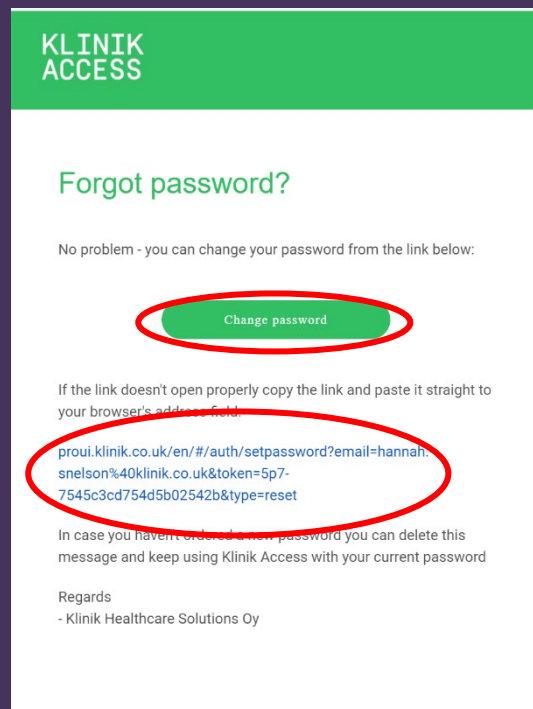
5. Go to your email account e.g., NHS Email account

6. Open the email received from the no-reply@klinik.co.uk

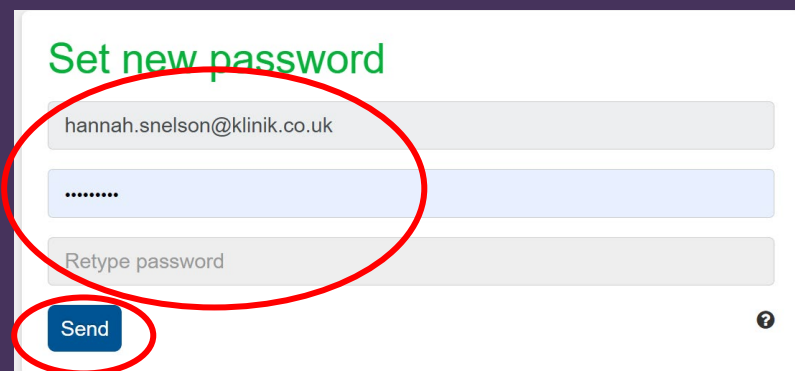




7. Select **the Change password** link or copy and paste the link in the email into your browser address field.

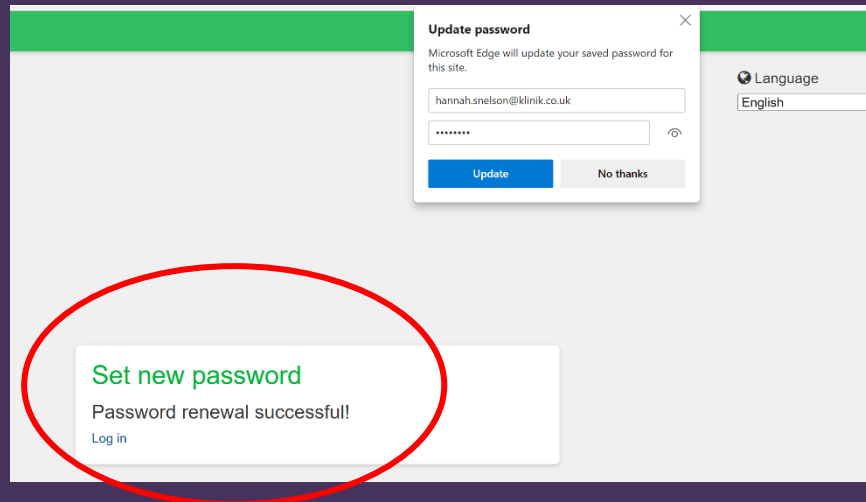


8. You will then be required to **Set new password, Re-type password** and then press **Send**.



9. Your password must be at least 8 characters long and contain both lower and uppercase letters and numbers.

10. You will then be notified that the password renewal has been successful, and you can then update your saved passwords if you wish to do so.



## Frequently Asked Questions

**Q:** Can I reset someone else's password for them?

**A:** You can complete steps 1-4 above for another user, but they are required to create their own password and this information should not be shared.

**Q:** I have tried to reset my password but it failed, why?

**A:** Please ensure you have completed the above steps and if you continue to have problems speak to your Super User. A practice Super User can remove your account and recreate it if necessary. If you require further support please contact [I.T.Support@klinik.co.uk](mailto:I.T.Support@klinik.co.uk)

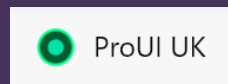
## How to...



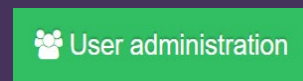
# Create a Multi-site User Account

The following steps should be taken if you wish to create a user who already has an account with another Klinik practice.

1. Log in to the **Professional User Interface**



2. Select **User Administration** from either of the buttons replicated along the top or down the left hand-side of the interface.



3. Select **Create New User**

Create new user

4. Complete all mandatory fields in the box marked with an asterisk \*

All fields except the user phone number is required.

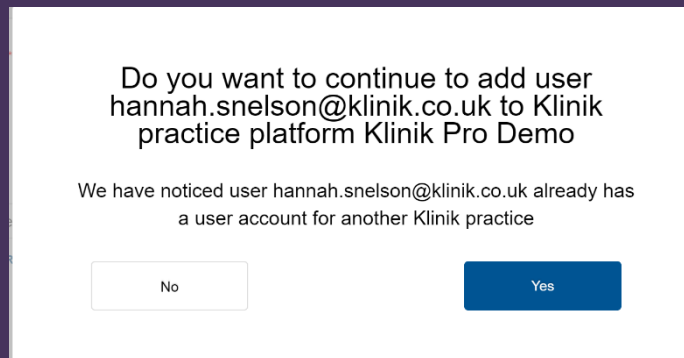
The **Units** are the teams that we have created for your practice. The units you select at this stage will give the user access and permission to process to these enquiries.

5. Allocate a **User Role** to grant the appropriate level of rights to the individual.

6. Select **Create New User** to save the account.

Create new user

7. You will then receive a notification box advising that the User has another Klinik account. If you wish to proceed, select **Yes**.



8. Once you have selected Yes, the user will then be able to access the additional Klinik ProUI you have granted them access to.

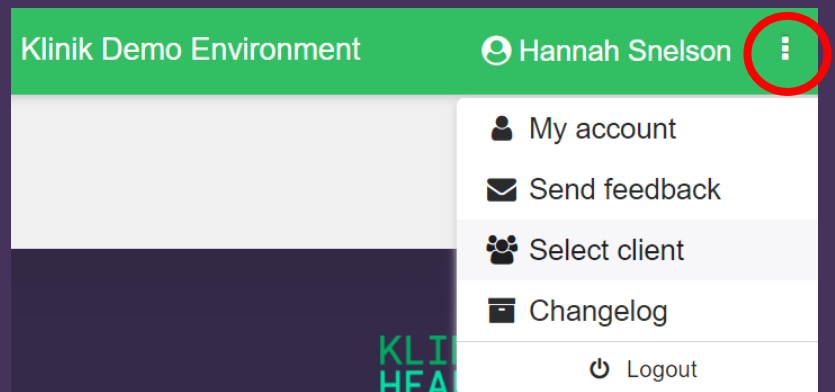
If a user has access to more than one practice, they can switch between practices using the following steps:

1. Log into the **Professional User Interface**

ProUI UK

2. Within the interface, select the three dots in top right-hand corner.

3. Choose **Select Client**



4. The User should then select the required practice from the list that populates.

The user should be aware that when logging into ProUI, the patient listing will default to the last practice viewed and so the user should always check the relevant practice name is displaying on the upper green bar of the interface before proceeding to manage any patient enquiries.

## Frequently Asked Questions

**Q:** If I grant access rights to a user from another practice what can they see?

**A:** The access level rights and units you have ticket will allow the user to migrate through your practice platform in exactly the same way as any other user.

**Q:** What happens if the user no longer needs to see my practice patient data?

**A:** Practice Super Users are responsible for ensuring user rights and access to the ProUI remain up to date. Users that no longer need access should simply be removed in User Administration. (see **How to.... Remove a User Account or Amend Access Rights**)

**Q:** Why would I need to grant a user from another practice access to my practice Klinik ProUI?

**A:** This is designed to facilitate the sharing of resources across your PCN where required.



## How to...

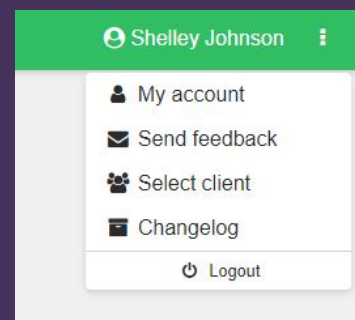
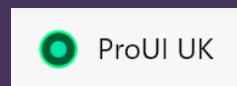


# Switch Klinik Practice Patient Lists

If you have been given access to the patient lists for another practice within your PCN which uses Klinik you will be able to access both platforms from within **ProUI**.

To switch to another practice platform, complete the following steps:

1. Log in to the Professional User Interface
2. Select the **three white dots** on the upper green bar of **ProUI**.
3. Then select **Client** from the drop down menu.



4. Then you will see a list of the practice platforms available to you on the left hand side of the screen. Select the practice that you wish to view from the options available under the messaging.



To switch to another practice:

1. Select the practice from the left hand column list
2. Select the units you wish to view
3. Press the 'Save' button
4. \* IMPORTANT\* Confirm the practice name has changed to the one you wish to view on the upper green bar before navigating to the patient list. **NB- the practice you selected when last logged into ProUI will automatically appear when you next log in so it's important that you check the correct practice name is displayed before accessing the patient list.**

Klinik Pro Demo

5. It's important to remember that the default interface when next logging into Klinik will always be the last one viewed so a check should be made each time to ensure the correct practice name is displayed on the upper green bar as in the following example.

The screenshot shows the Klinik Pro Demo interface. At the top, a green header bar displays "Klinik Demo Environment" on the left and "Shelley Johnson" with a user icon on the right. Below the header, the main content area is divided into sections: "Unhandled patient cases" with a blue button showing "55" and "Show only unhandled patient cases"; "Urgent patient cases" with an orange button showing "38" and "Show only urgent patient cases"; and "Unhandled messages" with a green checkmark icon and the text "There are no unhandled messages". At the bottom of the main content area, there is a grey button labeled "Show all patient cases". A large green arrow points from the text above to the top of the interface.

6. If you are still experiencing a problem, please firstly ensure you are using **Google Chrome** as your default browser, **clear your browser cache** and log out and back into all programmes. Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).

## Frequently Asked Questions

**Q:** Why would I need to see another practice interface

**A:** Another practice within your PCN may have granted you access to assist with workloads and promote collaborative working.

**Q:** If I leave my employer do I need to advise them that I have access to another **Klinik platform?**

**A:** Whilst your practice super users should check this, it is good practice to inform them as your account will need to be removed for all Klinik platforms separately.



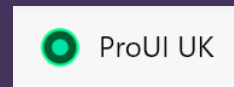
# How to...



## D.O.B not showing in ProUI

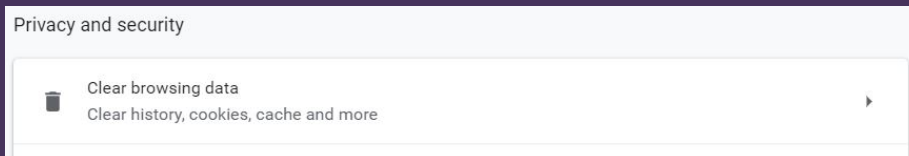
If a patient D.O.B is showing as 'invalid' in **ProUI** you should complete the following steps:

1. Log out of the Professional User Interface

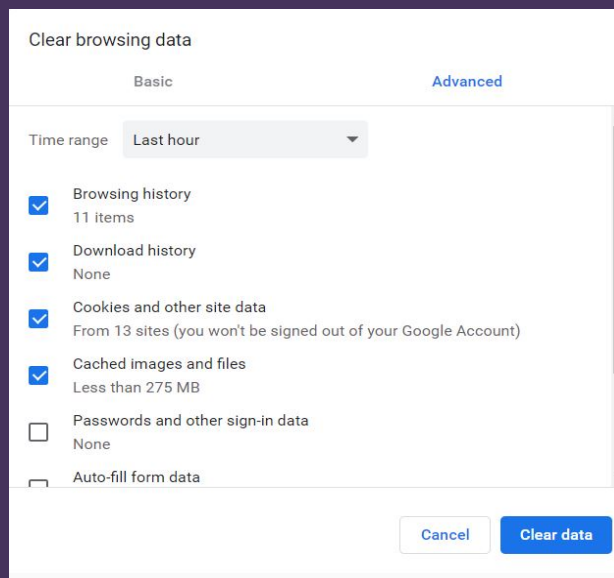


2. Select **Settings** or this may be called **Customise and Control** (three dots) to the right of the URL browser bar.

3. Scroll to **Privacy & security**, then select **Clear browsing data**.



4. Then select **clear data** to clear the search history and previous versions of ProUI.



5. Log back into ProUI and refresh the page. The D.O.B. will then appear in the correct format in each patient enquiry.

The screenshot shows the ProUI web application interface. The browser address bar shows the URL 'proi.klinik.co.uk/#/messages'. A red circle highlights the refresh button in the browser's navigation bar. The application header includes 'KLINIK ACCESS' and navigation tabs for 'Patient cases', 'Dashboard', 'User administration', 'Connect', and 'Instructions'. Below the header, there are filters for 'All units selected' and 'All priorities selected', along with a search bar. The main content area displays a table of patient enquiries with columns for 'ARRIVED', 'PATIENT / CASE', 'SUBJECT', and 'UNIT'. The table lists various patient enquiries with their arrival times, names, subjects, and units.

ARRIVED	PATIENT / CASE	SUBJECT	UNIT
Time 15:57	Andrew Thomas	Long-term condition review	Nursing/HCA Marlow
Time 15:56	Alan Harris	Blood Tests	Nursing/HCA Marlow
Time 15:51	Julia Miles-griffiths	Family Planning/Contraception	RAC
Time 15:48	Eve Kitchen	Urgent appointment	RAC
Time 15:47	Andrew Moynihan	Routine appointment request	GP Lane End
Time 15:43	Ronnie Murphy	Children's Immunisations	Nursing/HCA Marlow
Time 15:39	David Bone	Routine appointment request	GP Lane End
Time 15:35	Sarah Butler	Follow up appt	Reception Marlow
Time 15:35	Bushra Birchall	Urgent appointment	RAC
Time 15:33	Pamela (Mrs.) SPICKSLEY	Submit Information	GP Marlow
Time 15:32	Leeza Johnson	Submit Information	Reception Marlow
Time 15:23	Graeme Coole	Urgent appointment	RAC
Time 15:23	Christine Swinburn	Prescription Queries	Pharmacy

6. Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).

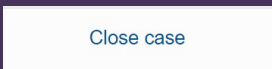
## How to...



# Close a Case in the ProUI

You should only close a case that has been triaged and managed appropriately in line with your agreed practice procedures. If you require support or advice, please seek assistance from your Practice Super User(s).

1. Once you have processed a case and there is no further action required, you can then close the record in the Professional Interface. However you first must ensure you copy the enquiry from Klinik into the patient's clinical record. (see **How to..... Copy text from ProUI and Connect**)
2. In order to close an enquiry the case must be moved to **'In progress'**
3. Select **Close Case** at the top of the patient enquiry form.



4. You will then be asked to provide your own judgement of the urgency of the need for care for cases that have the algorithm attached. If you are a non-clinician we recommend you validate the urgency recommendation provided by the algorithm.

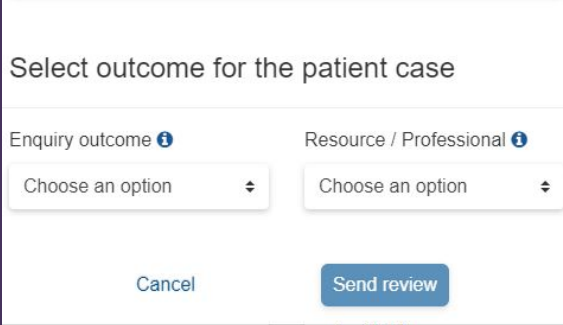
Give your own estimate

Give your own judgment on the urgency of the need for care

The evaluation of the system: **Non-urgent need for care**

	<b>Emergency</b> (Immediate need for care)
	<b>Urgent</b> (Need for care in 1-2 days)
	<b>Non-urgent need for care</b>
	<b>Non-urgent or suitable for self-care</b>

5. For all enquiry types you will also be asked to select the **Enquiry outcome** and **Resource outcome**. This should summarise how the patient enquiry was dealt with and which type of resource dealt with the enquiry. Note this should not be the resource that closed the enquiry.



The screenshot shows a web form titled "Select outcome for the patient case". It contains two dropdown menus: "Enquiry outcome" and "Resource / Professional". Both dropdowns currently display "Choose an option" with a downward arrow. Below the dropdowns are two buttons: "Cancel" and "Send review".

## Frequently Asked Questions

**Q:** Why do I need to provide my own evaluation of the urgency of a patient enquiry?

**A:** We use this information at Klinik to validate our urgency detection categories.

**Q:** What if I close a case in error?

**A:** You can select the archive tab, and search for the case using the **search button**, select it by left clicking the enquiry in the list, then select **Return in progress** and the enquiry will be moved back to the **New patient cases** list where you can access and progress the enquiry.

## How to...



# Copy Text from ProUI and Connect

Once you have processed a case and there is no further action required, you need to copy the enquiry from Klinik into the patient's clinical record. Below are the instructions on how to do this from both the **ProUI** and **Connect**.

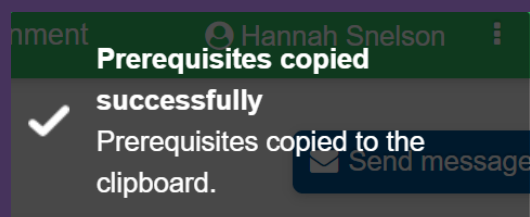
## ProUI

1. Within ProUI, once a patient enquiry has been moved to 'In progress' you must always ensure you copy the enquiry form into the patient health record before closing the enquiry in Klinik.
2. On the right-hand side of the screen inside the body of the enquiry form, beside **Prerequisite information** select **Copy**.



Prerequisite information  Copy

3. A black box will then appear advising the copy has been successful.



4. Alternatively, you can highlight the information and press **Ctrl and C** (Copy) on your keyboard.
5. You then need to paste the information into the correct patient's clinical record using **Ctrl and V** on your keyboard.



## Connect

You are only required to copy the enquiry from **Connect** into the patient Clinical record if you are closing the case and not directing it to a unit within **ProUI**. If you are unsure, please see **How to... Close a Case in Connect for more information**.

1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



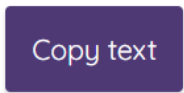
SUMMARY

2. You should only then select **Case Close** if there is no further action required and the enquiry does not need to be triaged as this will send the enquiry to the archive and it will not be seen in ProUI.



Case close ›

3. Once you have selected **Case Close** you will then be required to copy the text into the patient's Clinical record. Select **Copy text**.



Copy text

4. Alternatively, you can highlight the required text and press Ctrl and C (Copy) on your keyboard.
5. You are then able to paste the information into the correct patient's clinical record using **Ctrl and V** on your keyboard.

## Important!

- Please be aware that if the copy function is selected and the patient enquiry stored on the clipboard is not immediately pasted into the clinical record, there is a risk that a patient enquiry could be pasted into the wrong clinical record, as the clipboard will store the last copied enquiry.
- It is therefore essential that each time you copy a record you review the pasted information to ensure it has been added to the correct patient's clinical record.
- Please ensure all clinical information related to the patient enquiry is copied over. The copy function will only include the information that the patient has recorded. If you use Klinik to record treatment notes or comments or send the patient an SMS these records will not appear in the clinical record unless you copy these over separately.
- SMS messages and comments added to each patient enquiry can separately be copied into the clinical record, but the same care should be taken to ensure on each occasion the correct information has been pasted into the correct record.
- We recommend that once all the information has been copied over from ProUI, and the enquiry is ready to be closed that both records are closed at the same time.

## Frequently Asked Questions

**Q:** I have completed the steps you have advised, but the information is not pasting into the clinical record. Why?

**A:** Please ensure you are using Google Chrome as your default browser for a better experience. Please delete your browsing cache and log out and back into all systems before trying again. If you continue to experience problems once you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk)



## How to...




# Direct a Case to a Unit in Connect

1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



SUMMARY

2. At the bottom of the **Summary** page, you can select **Direct to unit**, to send the enquiry to appropriate team within your practice.
3. You will be required to select the appropriate unit from a drop-down list, and you can add a **Redirection comment** below if you choose.



Actions

Requires extra attention from a healthcare professional

Direct to unit

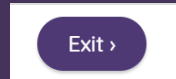
Select unit

Duty Team

Redirection comment

4. You can now select **Submit** to direct the enquiry to the chosen unit within the **Professional User Interface**.

5. There is no requirement for you to **Copy text** at this stage as you can copy the information from the ProUI once the case has been triaged and processed. Here you should press **Exit** to return to the **Connect** platform.



## Frequently Asked Questions

**Q:** What should I do if I direct the case to the wrong unit?

**A:** If you have access to the unit which you have initially directed the case to within the **ProUI**, you can here **Direct to another unit** if necessary. If you do not have access to the unit, you can contact a Super User to action this for you, or if the person triaging feels it is inappropriate for their team, they can redirect the case.

**Q:** What if the case does not need triaging and is suitable for closure?

**A:** Please see **How to... Close a Case in Connect** for guidance.

# How to...



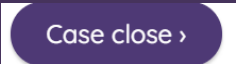
## Close a Case in Connect

You should only close a case in Connect that requires **no further action**. All cases that are closed within Connect will be directed to the Archive. If you require support with this, or you are unsure, please seek assistance from your Practice Super User(s) before closing the case.

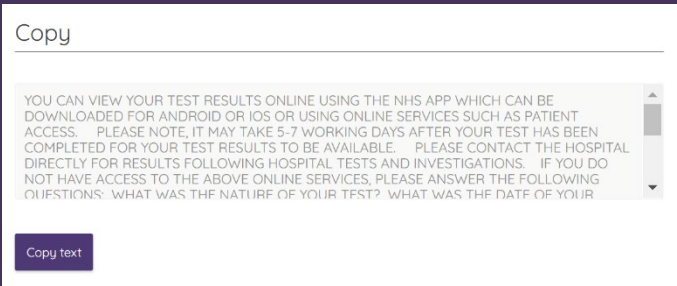
1. Once you have processed an enquiry within **Connect** you will reach the **Summary** page.



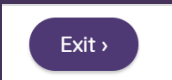
2. You should only then select **Case Close** if there is no further action required and the enquiry does not need to be triaged.



3. Once you have selected **Case Close** you will then be required to Copy the text into the patient's Clinical record. Please see **How to...Copy Text** for further guidance if required.



4. Once you have copied the text into the Clinical record you can now press **Exit**, and this will return you to the Connect platform.



## Frequently Asked Questions

**Q:** When should I be closing a case in Connect?

**A:** This is entirely down to your practice procedures and some practices may wish to triage all enquiries. We suggest that the **Case close** button should only be used for cases that require no further action. An example of this may be a patient who is calling to find out their recent test result. Once the call-handler has given the patient this result (in line with internal procedures) the case may be suitable for closing as it does not then require triaging by a Clinician or an appointment. Please refer to your practice management if you are unsure if you can close a case in Connect.

**Q:** What should I do if I press **Case Close** by mistake?

**A:** The case will be directed to the **Archive** in the **ProUI**. You can select the case and return it to **In progress** which will then send the enquiry to the **New patient cases listing**. Here you can **Add a comment** or **Direct to another unit** if appropriate.

**Q:** How do I direct a case to a unit within **Connect**?

**A:** Please see **How to... Direct a Case in Connect** for guidance.

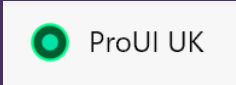
# How to...



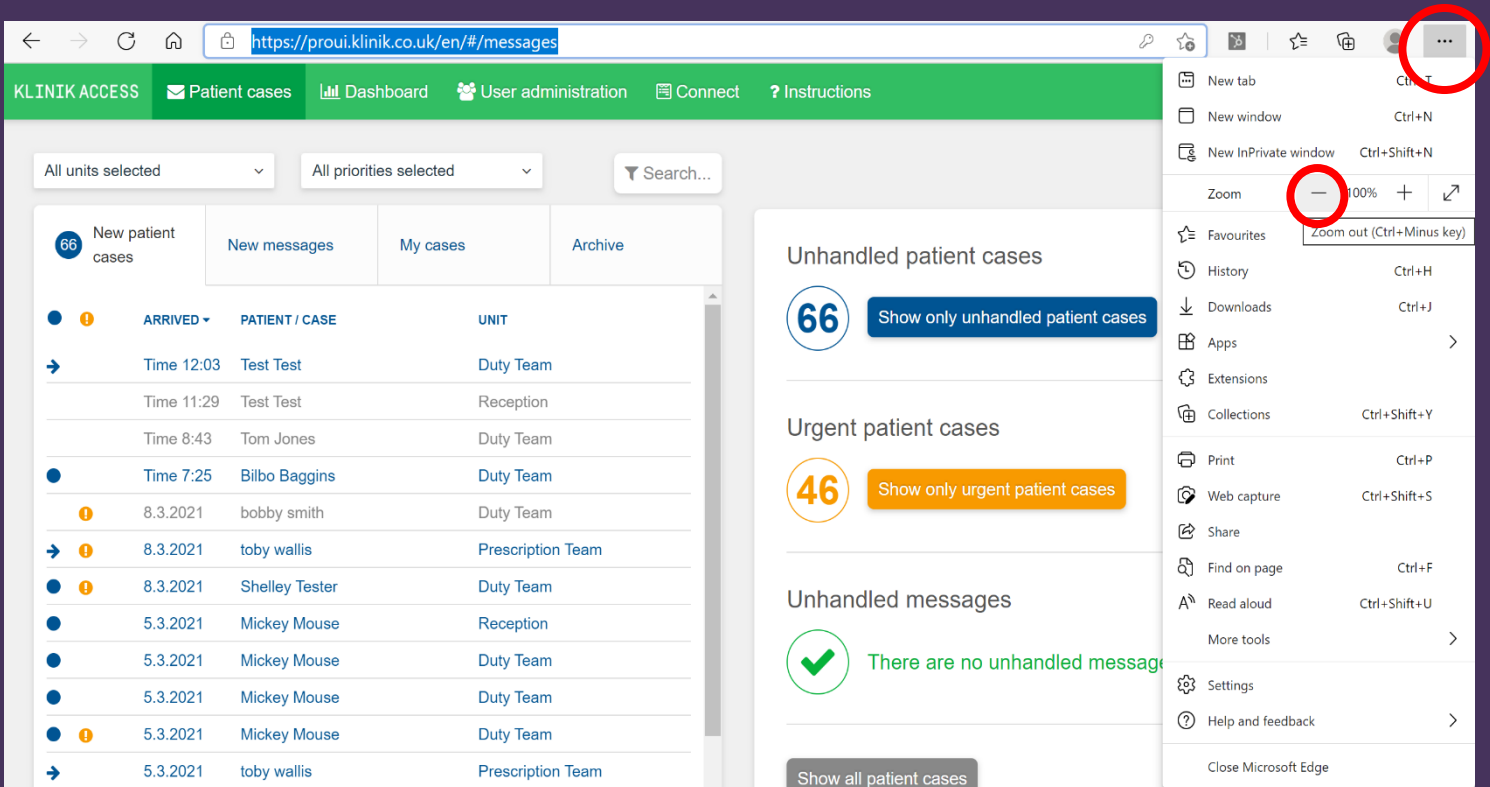
## Adjust your Screen Resolution

If you cannot see the practice name on the upper green bar of the professional interface and/or the patient list view as you normally can please take the following steps.

1. Log out of the Professional User Interface



2. Select **Settings** or this may be called **Customise and Control** (three dots) to the right of the URL browser bar.





3. The **Subject** heading and the Practice Name should now be visible.
4. If you are still experiencing a problem, please firstly ensure you are using **Google Chrome** as your default browser, **clear your browser cache** and log out and back into all programmes. Should the problem continue when you have completed all the above steps, please email [IT.Support@Klinik.co.uk](mailto:IT.Support@Klinik.co.uk). For support with clearing your browser cache please hold **Ctrl** on your keyboard click [here](#).