

# Q-Flow Guidance

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# Accessing the QFlow Admin Site

The site can be accessed via the following link:

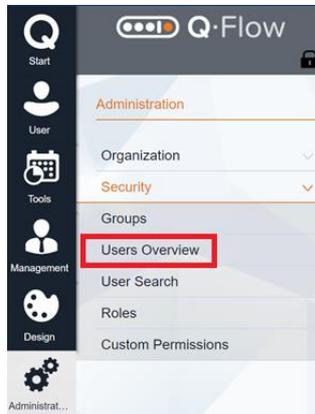
<https://www.nhs.uk/book-a-coronavirus-vaccination/admin/>

## Create & manage user accounts

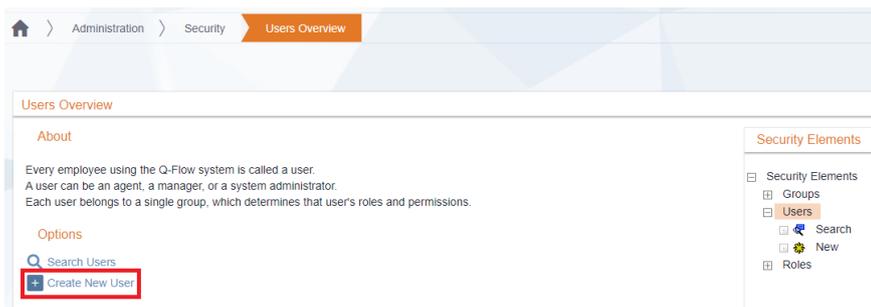
Every employee using Q-Flow is called a user and each user belongs to a single group that determines their roles and permissions.

### Creating a new user account

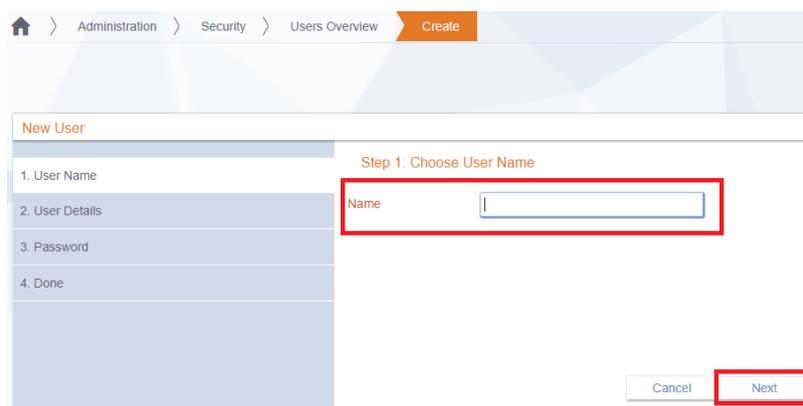
1. Select **Administration > Security > Users Overview**.  
(This opens the **Users Overview** screen)



2. Select **Create New User**.  
(This opens the **Create new user** screen)



3. Complete the **Name** field with the user's email address (usually @nhs.net) then select **Next**.  
(This opens the **User Details** screen)



4. Complete each of the following fields on the **User Details** screen:

- *First Name*
- *Last Name*
- *Email Address*
- *Group*
- *Top Unit*

**New User**

Step 2: User Details

1. User Name

2. User Details

3. Password

4. Done

First Name

Last Name

Tel Number

Email

Group: NHS Site Managers

Top Unit

- East of England region
- London region
- Midlands region
- North East and Yorkshire region

5. Create a **Password**. This can be manually created by you or you can let Q-Flow create this. (Password must be a minimum of 10 characters long)

**New User**

Step 3: Password

1. User Name

2. User Details

3. Password

4. Done

Manually enter the password for this account (Must be a minimum of 10 alphanumeric characters)

Password

Confirm Password

Let Q-Flow generate the password

Previous Finish Cancel

6. Select **Finish** when complete. The username and password will be confirmed on the **Done** screen.

(Email the user with the **Username, Password and a links to Q-Flow**)

**New User**

1. User Name

2. User Details

3. Password

4. Done

Done!

The user Test.User2 was created successfully.  
The new user's password is dPD-vKY6J

+ Create another user

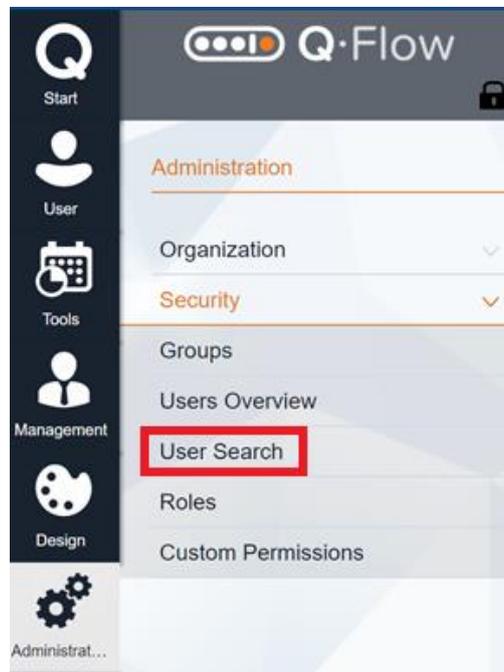
Edit the new user account

Return to Security Manager

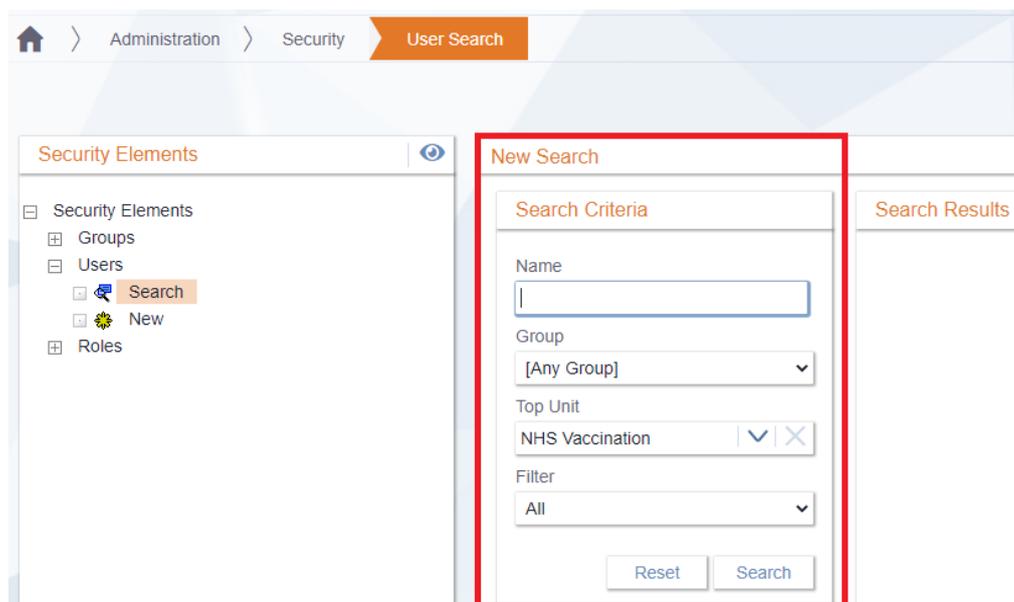
# Search for a User

## Creating a new user account

1. Select **Administration > Security > User Search**.  
(This opens the **User Search** screen)



2. Enter the name of the user in the **Name** field. You can also filter by **Group** (role) and by **Top Unit** (region/location).  
(Select **Search** and the name of the user will appear in **Search Results**)



# Edit a user's profile

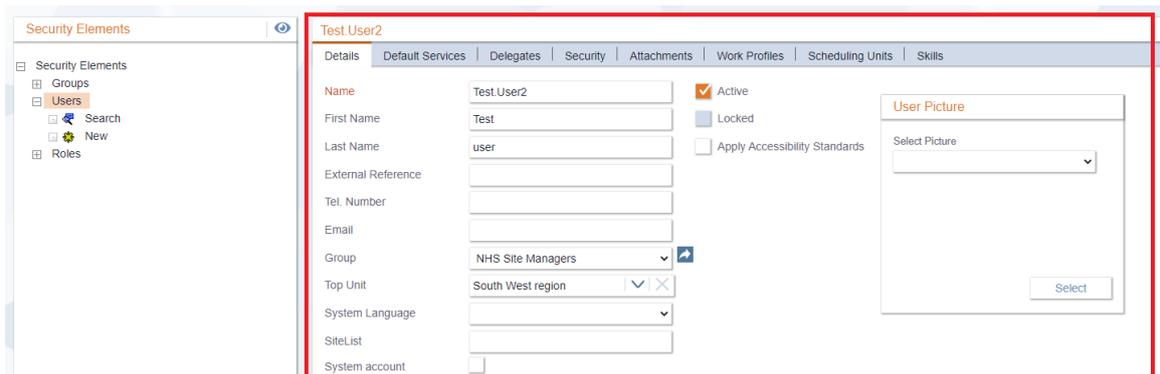
Once you have found the user you are searching for using the 'search for a user' form, you can edit there profile.

## Editing a user's profile

1. Click on the name of the user that appears in the **Search Results** window.  
(This opens the screen which allows you to edit the user's details)

| Search Results  |            |                     |
|---|------------|---------------------|
|   | User Name  | First and Last Name |
|  | Test.User2 | Test user           |

2. Edit the user's details.  
(Click **Save**)



The screenshot shows the 'Test.User2' profile editing page. The left sidebar contains a tree view with 'Security Elements' expanded to 'Users'. The main content area has a red border and contains the following fields:

- Name:** Test.User2
- First Name:** Test
- Last Name:** user
- External Reference:** (empty)
- Tel. Number:** (empty)
- Email:** (empty)
- Group:** NHS Site Managers
- Top Unit:** South West region
- System Language:** (empty)
- SiteList:** (empty)
- System account:** (checkbox)
- Active:**
- Locked:**
- Apply Accessibility Standards:**
- User Picture:** Select Picture (dropdown menu) and Select button

# Unlocking a user's account

To unlock a user's account you will need to search for the user.

## Editing a user's profile

1. Find the name of the user by following the 'Search for a user' steps.  
(This opens the screen which allows you to edit the user's details)
2. Follow the steps in the 'Edit a user's profile' section.  
(Once you have found and clicked on a user's name you can identify if their account is locked if the **Locked** checkbox is ticked)

The screenshot shows the user profile edit page for 'Test.User2'. The 'Security' tab is selected. The 'Locked' checkbox is checked, indicating the account is locked. A red box highlights the 'Active', 'Locked', and 'Apply Accessibility Standards' options.

3. Select the **Security** tab and then click **Unlock Account**.

The screenshot shows the user profile edit page for 'Test.User2'. The 'Security' tab is selected. The account status is 'Locked Out'. The 'Unlock Account' button is highlighted. The account is currently 'Locked Out'.

## Reset a user's password

To reset a user's password, you will need to search for the user.

### Resetting a user's account password

1. Find the name of the user by following the **'Search for a user'** steps.
2. Follow the steps in the **'Edit a user's profile'** section.
3. Follow the steps in the **'Unlock a user's account'** section.  
(You can reset a password in the same place as unlock a user's account)

In the **Security** tab you have the opportunity to reset a user's password.

**Password**

Click [Reset Password](#) to generate a new random password for this account

[Reset Password](#)

Manually set a new password to this account

**New Password**

**Confirm New Password**

## Check a vaccine appointment

- Go to <https://www.nhs.uk/book-a-coronavirus-vaccination/check/login>
- Enter your Q-Flow user name and password and click **Login**

Select the site at which you work then click **Confirm**.



**NHS** Check a vaccination appointment

**Please confirm your current location**

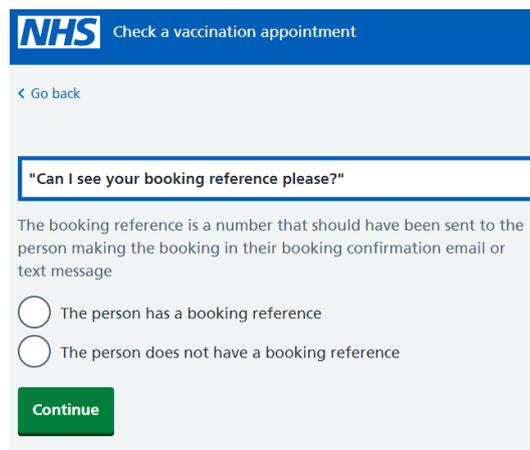
Vaccination centres

Elland Road Stadium - Vaccination Centre

Not listed

**Confirm**

**For each person who arrives at the vaccination centre, you need to ask them for a booking reference.** You will now have a page with two options:



**NHS** Check a vaccination appointment

< Go back

**"Can I see your booking reference please?"**

The booking reference is a number that should have been sent to the person making the booking in their booking confirmation email or text message

The person has a booking reference

The person does not have a booking reference

**Continue**

**Option 1 - The person has a booking reference** - Select this option if the person has a booking reference. They will have been sent this via an email or a text, then select this option. Then click Continue. Enter the booking reference into the relevant field then click Continue again.

**Option 2 - The person does not have a booking reference** - Select this option if the person does not have a booking reference, then click Continue. Enter their last name and date of birth, and then click Continue. This will bring up their appointment.

**The app only searches appointments for today and at the selected vaccination centre.**

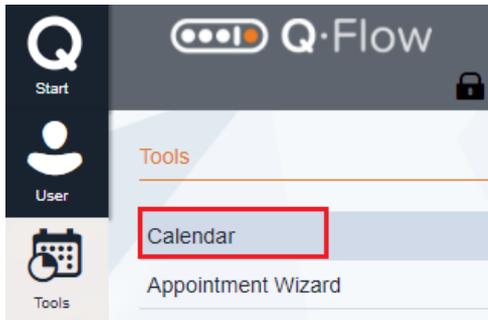
**When you are done, remember to Log Out.** This can be found at the bottom of any page on the app.

# Manage your appointments

As a site manager you can:

## 1. VIEW YOUR CALENDAR:

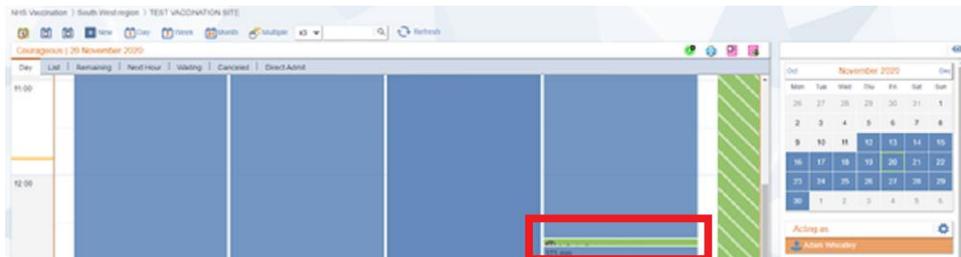
On the left side bar select **Tools > Calendar**.



Change the view by clicking on the **Day**, **Week** or **Month** icon.

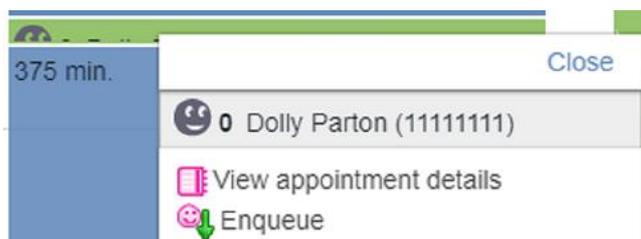


- At the beginning of each day, **PRINT OUT THE APPOINTMENTS** for the day (in case of loss of internet access) PLEASE VIEW NEXT SECTION, 'PRINTING APPOINTMENTS'.
- VIEW THE DETAILS OF BOOKED APPOINTMENTS** (shown as green in the calendar).



Left clicking in their entry to:

- view appointment details,
- enqueue (check patients in)
- view the customer record (patient record), including **Appointment Plans** (appointments for the 2 doses)



You will be able to view important patient information:

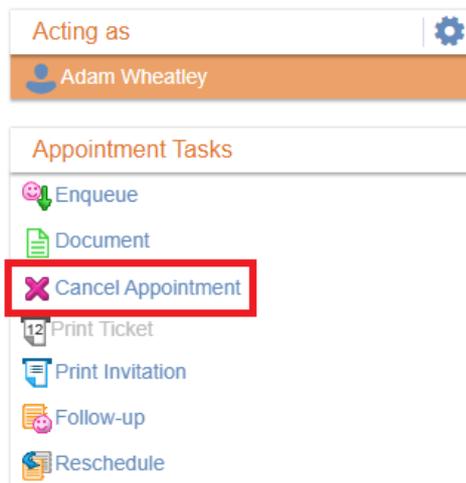
- Name
- Personal ID
- Contact information
- Service (vaccine they are scheduled to receive)
- Date and Time
- Customer status (a black smiley face icon means the patient is expected to arrive, a green smiley face means the patient has arrived for their appointment)
- Case ID (booking reference)



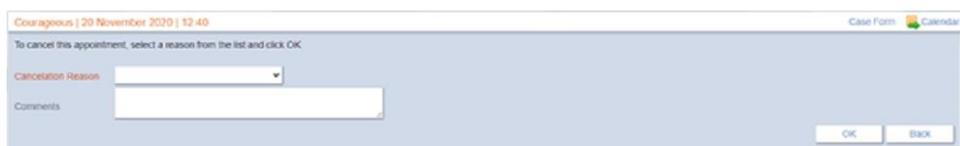
#### 4. CANCEL AN APPOINTMENT.

On the right hand side of the patient screen, there is a menu called **Appointment Tasks**.

1. Select **Cancel Appointment**.



2. When the **Cancellation screen** opens, select **Cancelled by site** in the **Cancellation Reason** drop down box, and click **OK**.



\* If you are cancelling someone's first dose appointment and they have an appointment booked for their second dose, you'll have the option to **cancel all appointments in the plan**.

Courageous | 09 December 2020 | 11:00

Warning: This appointment is part of a appointment plan  
What would you like to do?

- Cancel this appointment only
- Cancel all appointments from this appointment and forward
- Cancel all appointments in the plan

If cancellation is successful, a green confirmation box will appear.

If the **patient's contact information** on the appointment details screen includes:

- **Email address or mobile telephone number** -> they will automatically receive a notification telling them about the cancellation.
- Only includes a **landline telephone number** -> someone at the site will need to phone the patient to confirm the cancellation.
- **No contact** -> there is no way to tell the patient about the cancellation and they will most likely turn up for their appointment.

## Printing Appointments

It is important to print out your calendar at the start of each day as it serves as a backup in case you lose access.

1. Select the **print** icon located above the calendar.



2. Select your printout type from two options:
  - Appointments only
  - Print entire calendar

### Printout Type

- Appointments only  
 Entire calendar

3. Select your boxes for the information you wish to include in the included information list, we recommend selecting all for a comprehensive print out.

### Included Information

- Time  
 NHS number  
 Customer first name  
 Customer last name  
 Customer phone number 1  
 Customer phone number 2

4. Select the print button to open a new screen with a complete list of appointments for the selected date.

