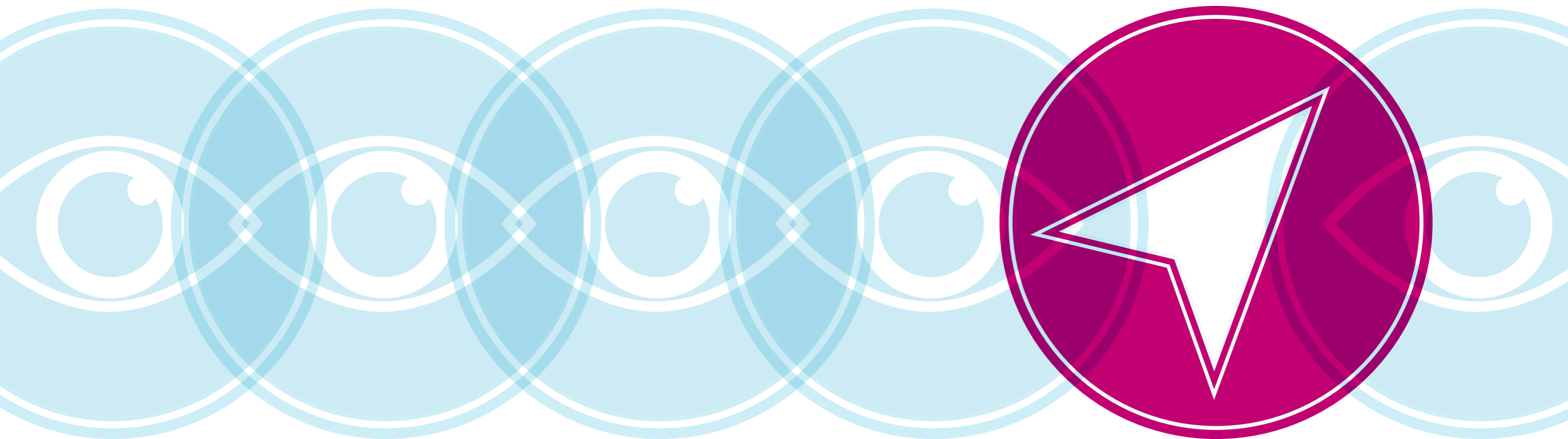


# User Management for PCSE Online

## Ophthalmic User Management Guide



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## 1. User Administrator Overview

### 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 Administrator Roles

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

| PCSE Online Role                      | Role Description   |
|---------------------------------------|--|
| PL Organisation User Administration   | Ophthalmic Performer List User Administrator – responsible for providing PCSE Online user accounts for Performers within their practice. |
| OPTO Organisation User Administration | Ophthalmic User Administrator – responsible for providing PCSE Online user accounts for Ophthalmic Payments users within their practice. |

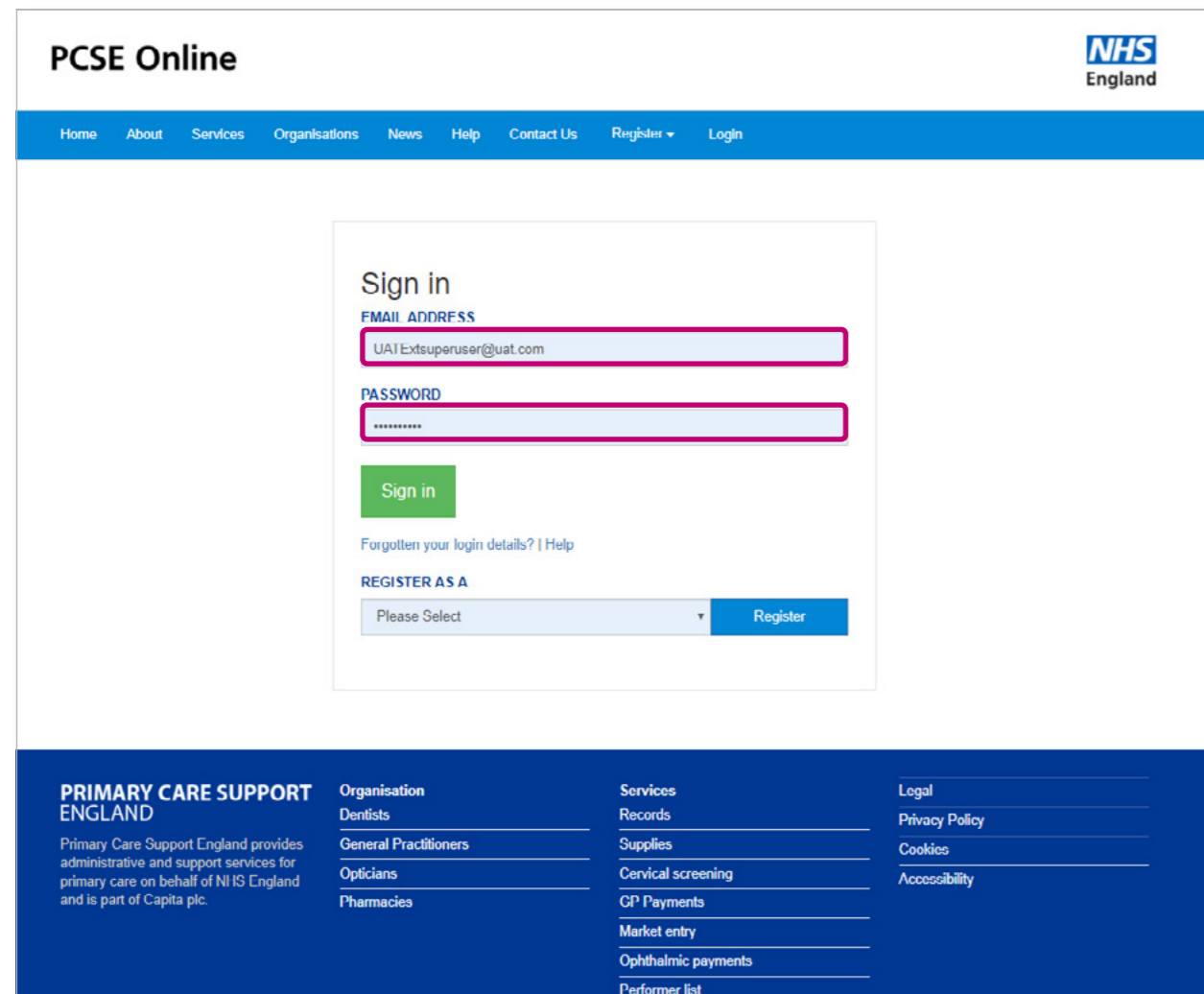
### Ophthalmic Performers

The User Administrator must set up PCSE Online user accounts for Performers within their practice by following the steps below.

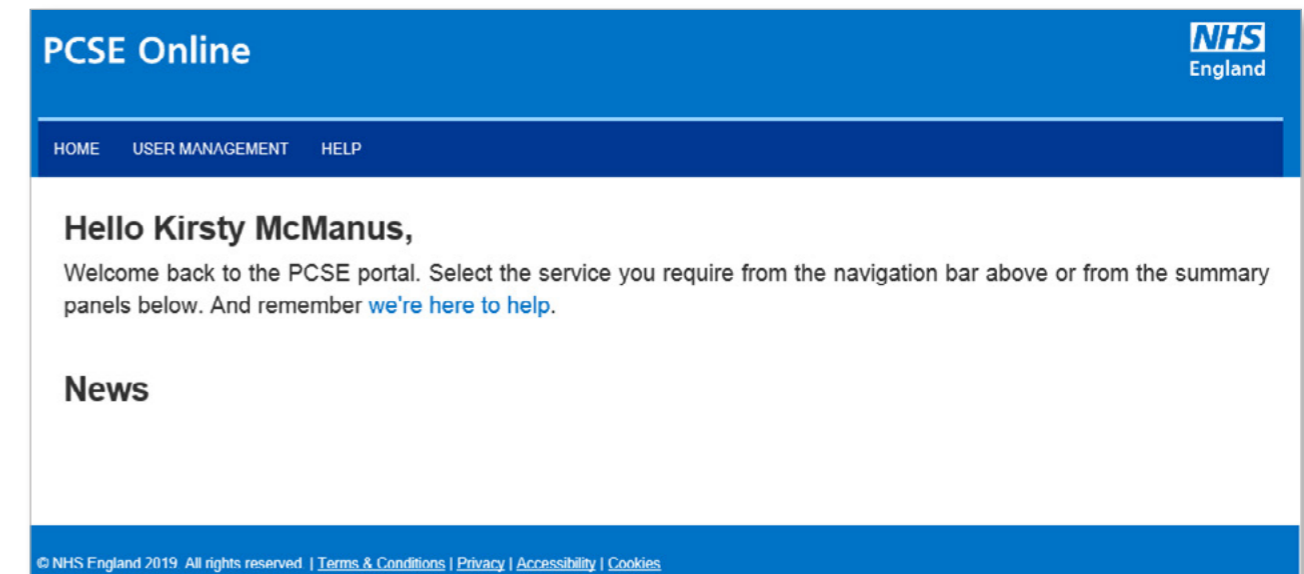
## 2. How to Create a Portal User as a Performer

### Step by step guide to creating a PCSE Online user account for a Performer

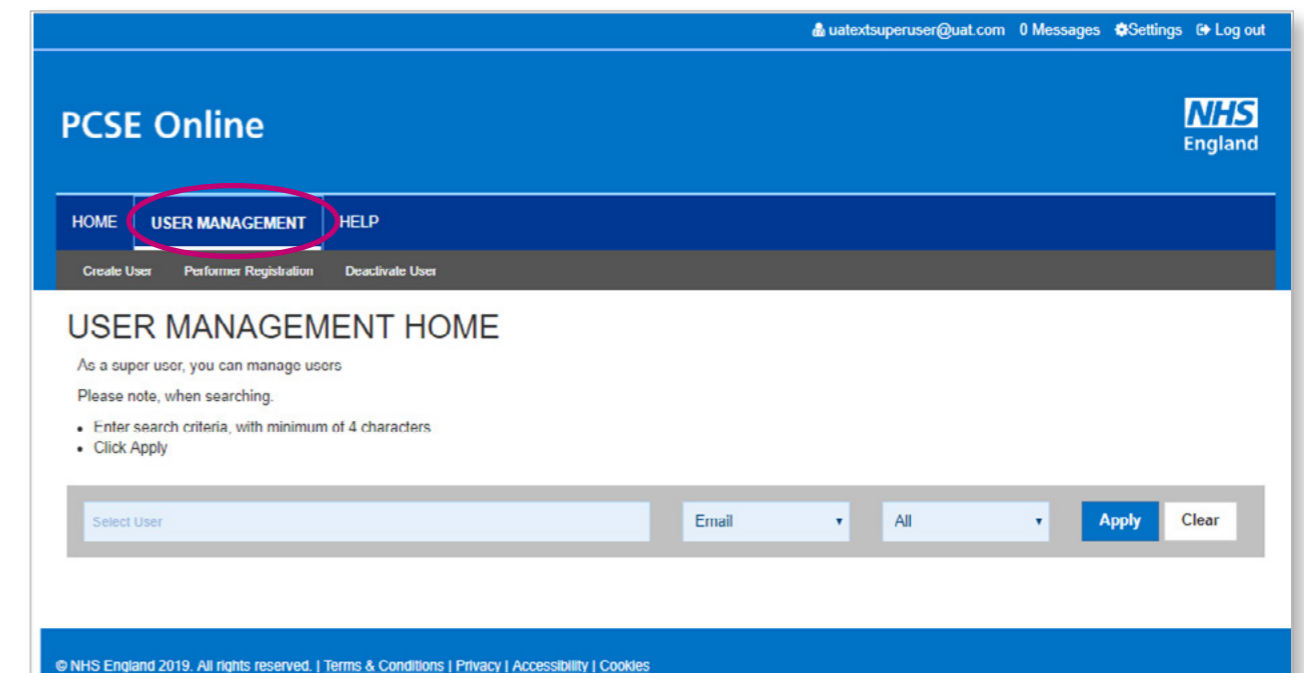
1. User Administrator logs into PCSE Online. Enter **email address** and **password**.



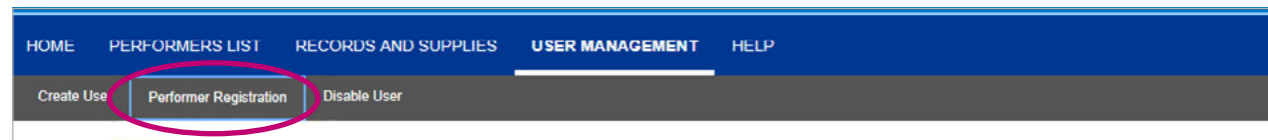
2. Access the User Management Landing Page.



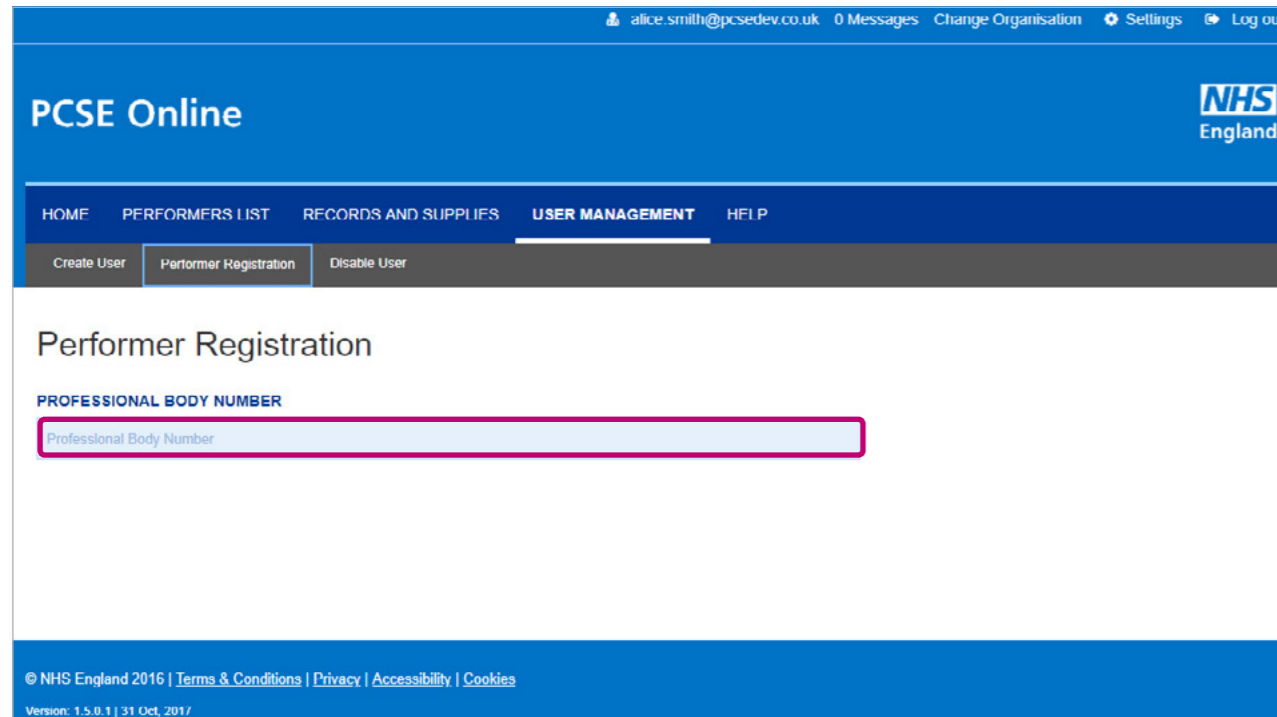
3. Click on 'User Management'.



From the User Management menu, choose the **Performer Registration** option.

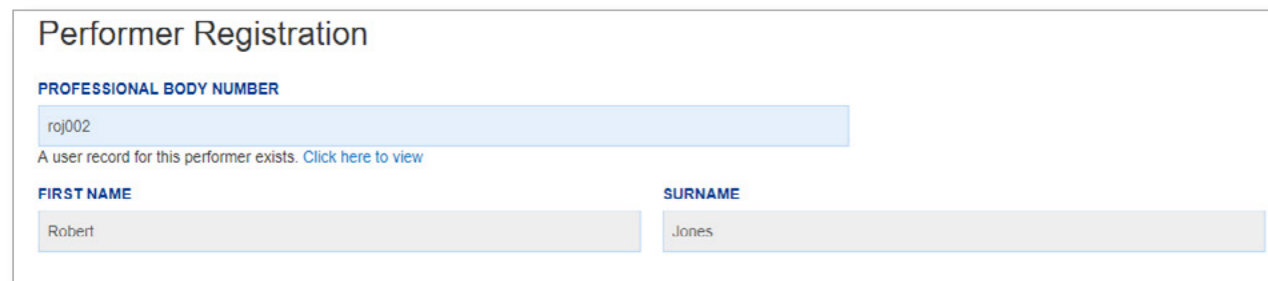


You will see the screen below where you must provide the **Professional Body Number** (GOC, number) of the Performer.



Specify the Professional Body Number and press the **'Enter'** key.

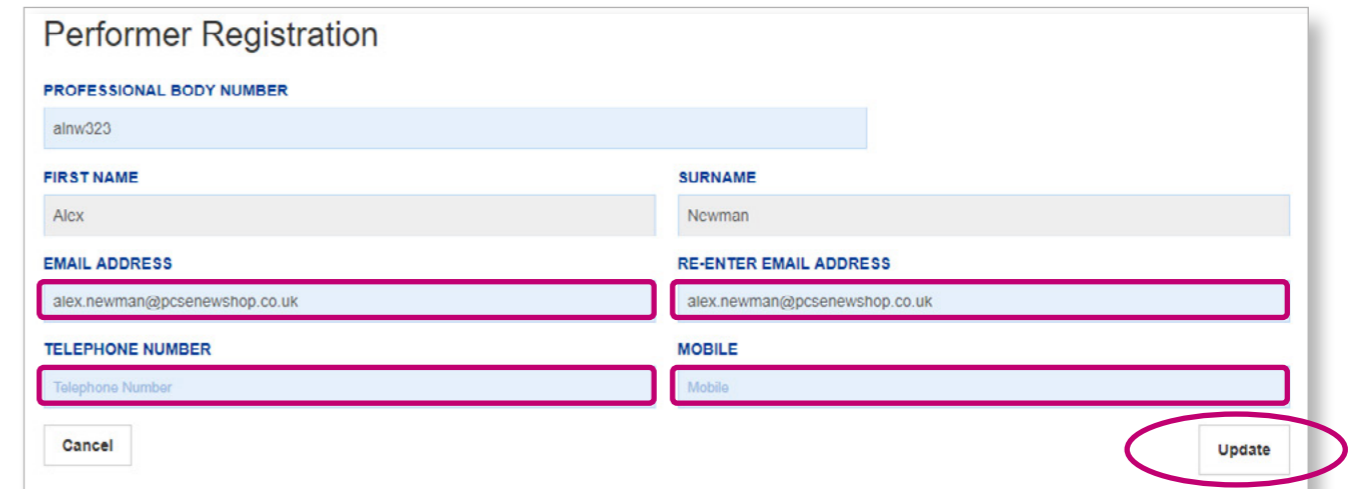
If the Performer is already a Portal User, you will be shown the first name and surname of the Performer.



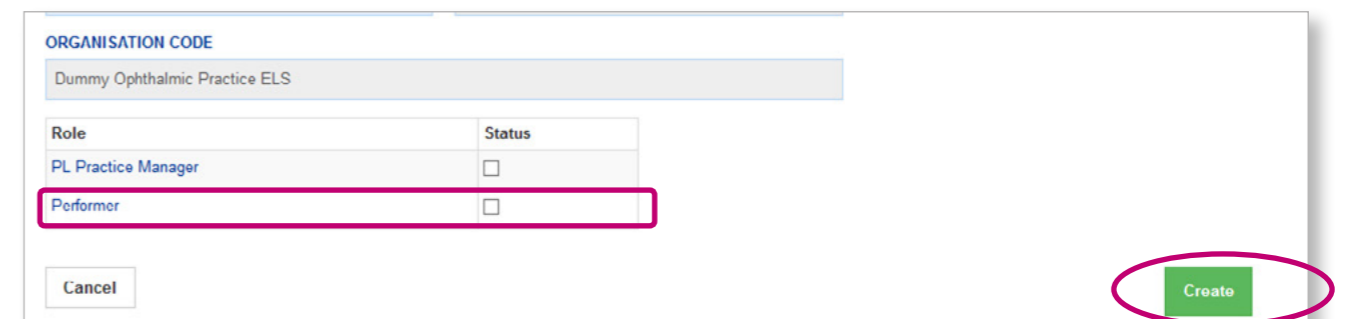
You can click on the **'Click here to view'** link to see the full details of the Performer's Portal User. The screen that opens when you click on the link is same as the one for **'Update Portal User'**.

### 1. Performer is not already a Portal User

If the Performer is not already a Portal User, you will need to confirm the Performer's email address and telephone numbers and click the **'Update'** button.



You will be taken to the **'Create Portal User'** Screen with the fields populated with the Performer's details. You should select a the **'Performer'** Portal Role and click the **'Create'** button.



If you see any error messages during this process, please contact the Customer Support Centre via <https://pcse.england.nhs.uk/contact-us/> or phone **0333 014 2884**.

### 2. Performer verifies User Account

Once the user account has been created, the Performer will receive an email with a link for them to verify the account and set up a password.

### 3. Performer is already a Portal User

If the Performer is already a Portal User, you will be shown the first name and surname of the Performer.

**Performer Registration**

**PROFESSIONAL BODY NUMBER**

roj002  
A user record for this performer exists. [Click here to view](#)

**FIRST NAME**                      **SURNAME**

Robert                                  Jones

You can click on the **‘Click here to view’** link to see the full details of the Performer’s Portal User Account.

### 4. Professional Body Number is invalid

If the Professional Body Number specified is invalid, you will see an error message ‘Performer not found’.

**Performer Registration**

**PROFESSIONAL BODY NUMBER**

AAXX  
**Performer not found.**



If the Professional Body is not found, please contact the Customer Support Centre via <https://pcse.england.nhs.uk/contact-us/> or phone **0333 014 2884**.

## 3. User Administrator Roles

### 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.<br><br>You must create a PCSE Online account for a Performer by following the steps in Section x before assigning the role of GOS Performer for the Ophthalmic Payments system, |
| 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** **NHS**  
England

Home About Services Organisations News Help Contact Us Register Login

**Sign in**

EMAIL ADDRESS

PASSWORD

[Sign in](#)

[Forgotten 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 NIS England and is part of Capita plc.

Organisation

- [Dentists](#)
- [General Practitioners](#)
- [Opticians](#)
- [Pharmacies](#)

Services

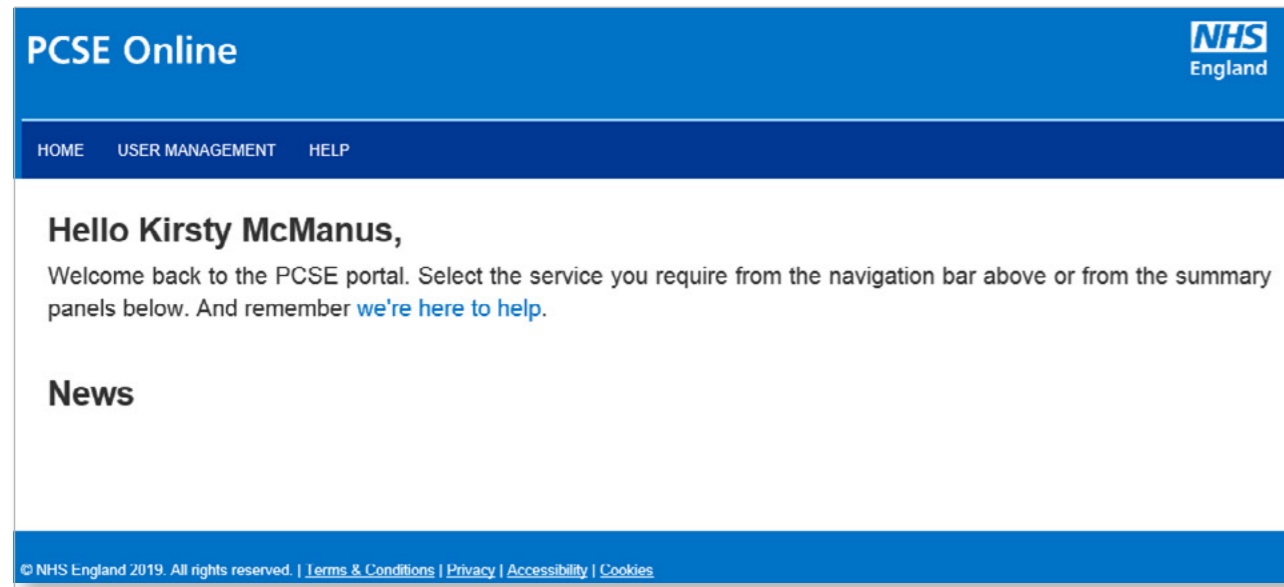
- [Records](#)
- [Supplies](#)
- [Cervical screening](#)
- [GP Payments](#)
- [Market entry](#)
- [Ophthalmic payments](#)
- [Performer list](#)

Legal

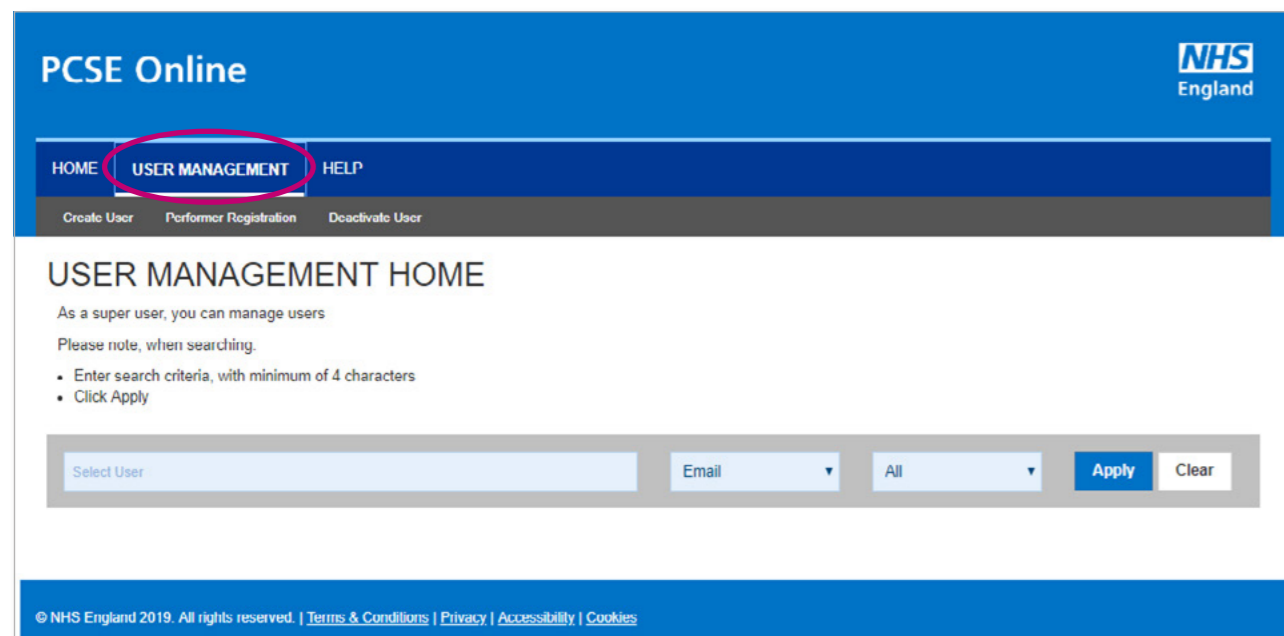
- [Privacy Policy](#)
- [Cookies](#)
- [Accessibility](#)



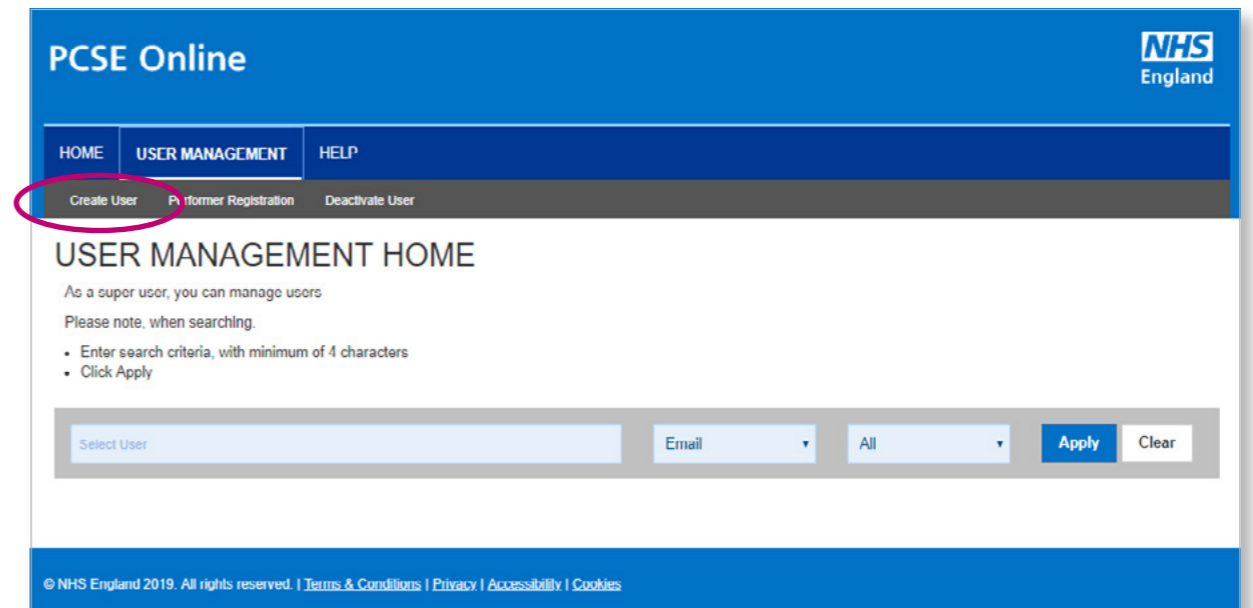
2. Access the User Management Landing Page.



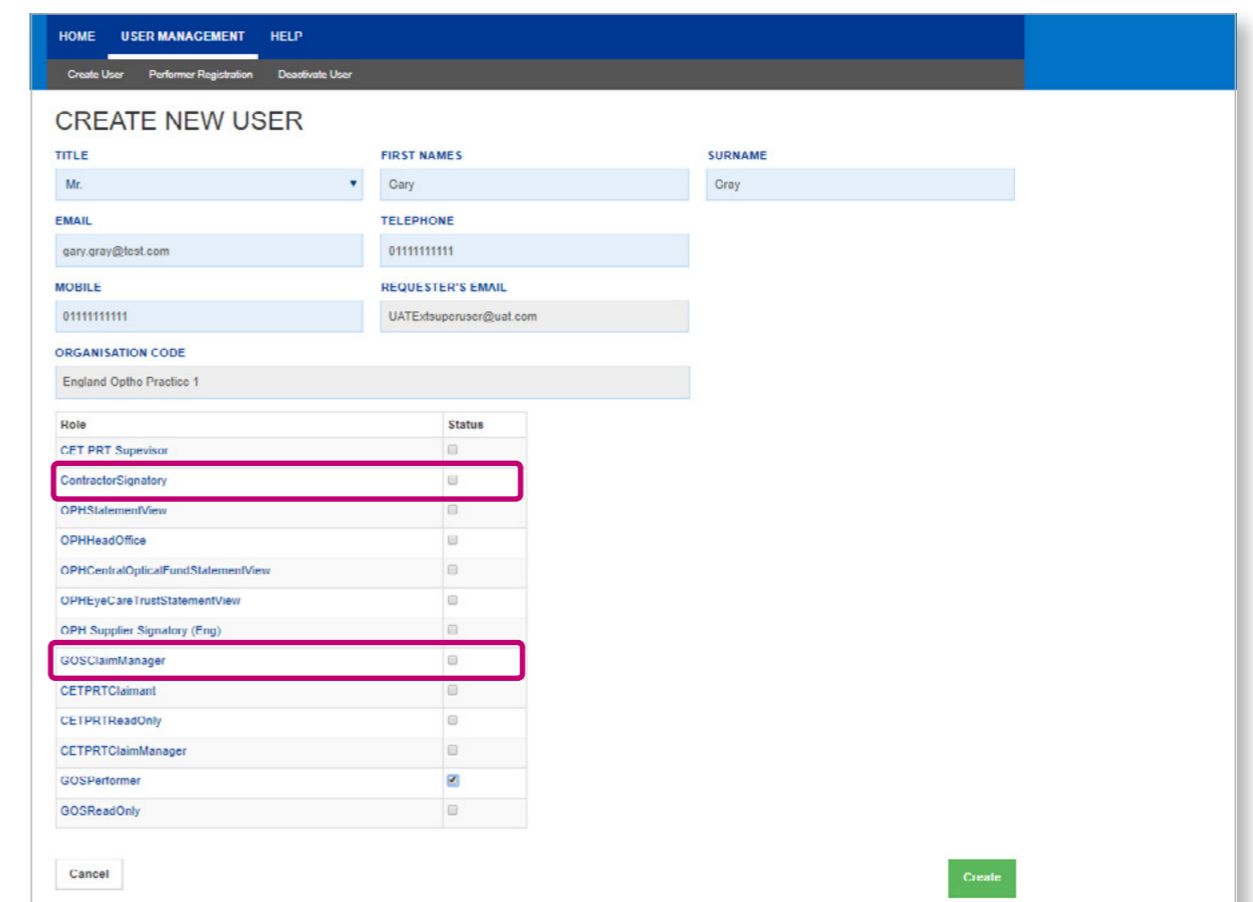
3. Click on 'User Management'.



Click 'Create User'



Assign user role(s). Enter user details and assign role(s). Then click 'Create'.



If you see any error messages during this process, please contact the Customer Support Centre via <https://pcse.england.nhs.uk/contact-us/> or phone **0333 014 2884**.

**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

## 4. User has forgotten their log in details

### User has forgotten their password

If a user has forgotten their password, they should click “**Forgotten your login details**” on the PCSE Online homepage.

The User should then enter their user name and click “**Reset Password**”.

### User has forgotten their User Name

If a User has forgotten their User Name then they must contact their User Administrator.

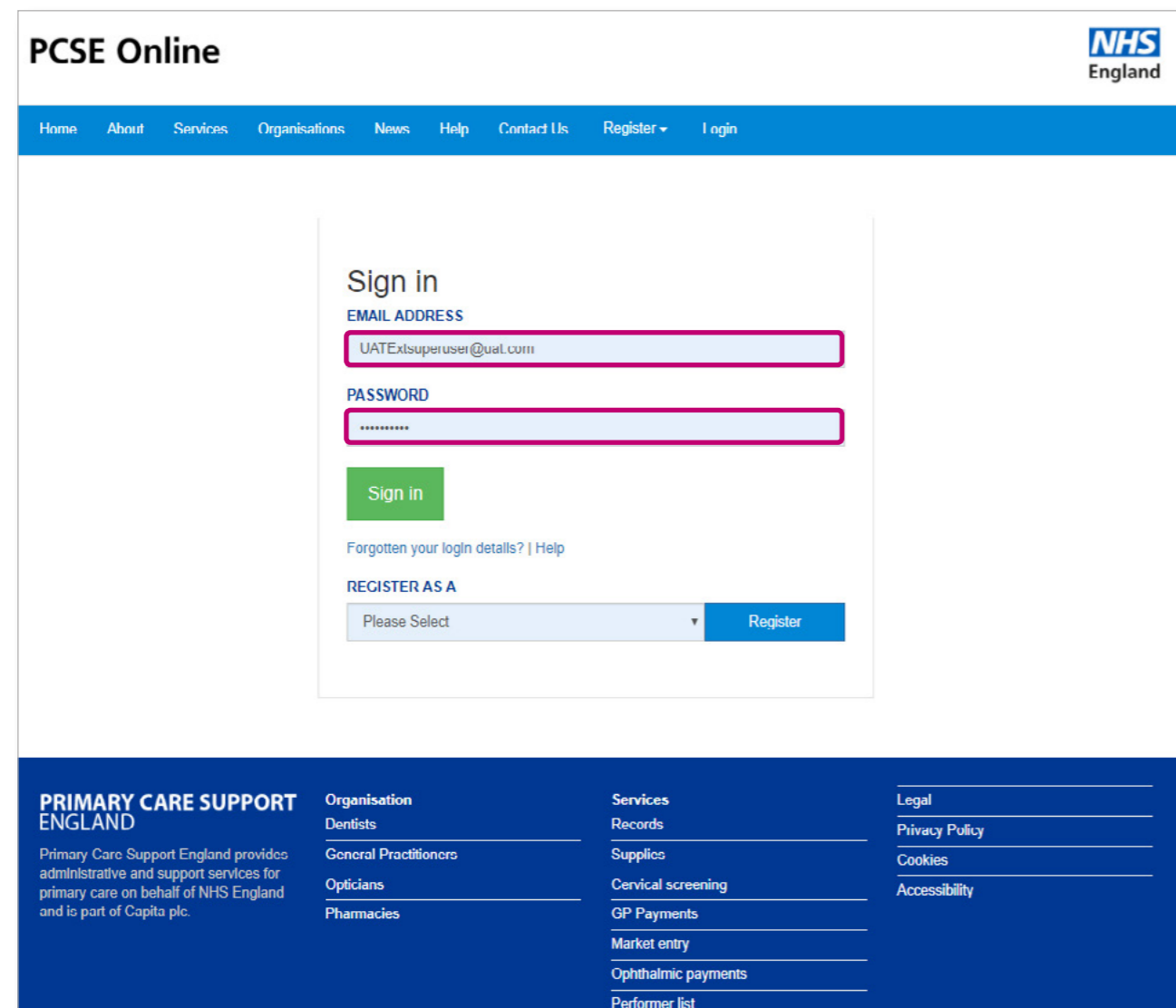


# 5. Deactivating User roles

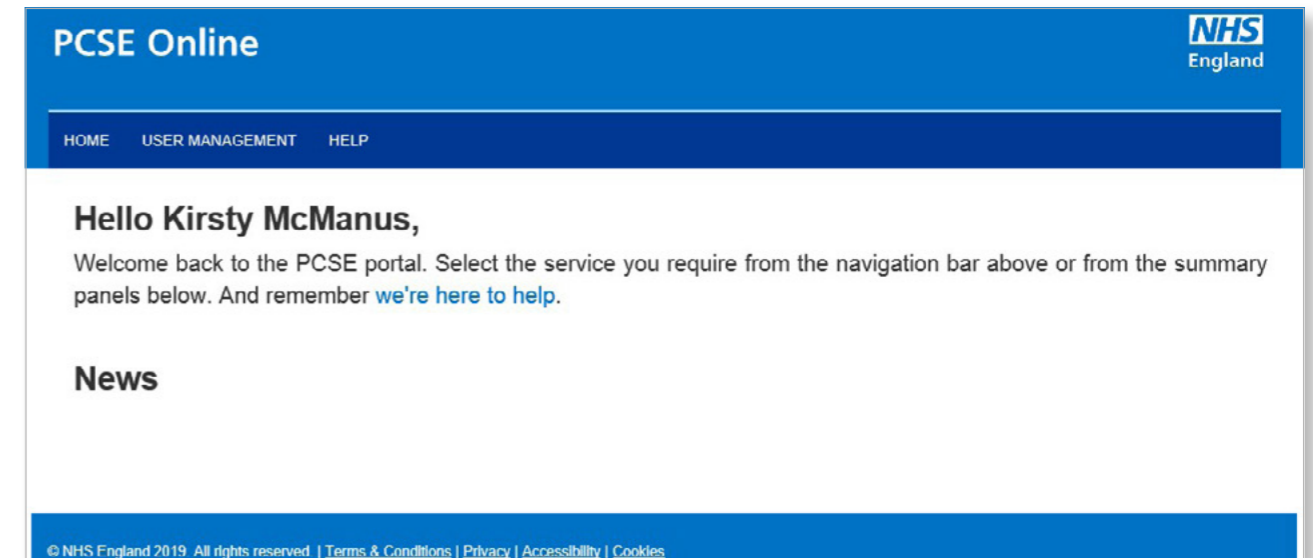
## Step by step guide to deactivate a PCSE Online User

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

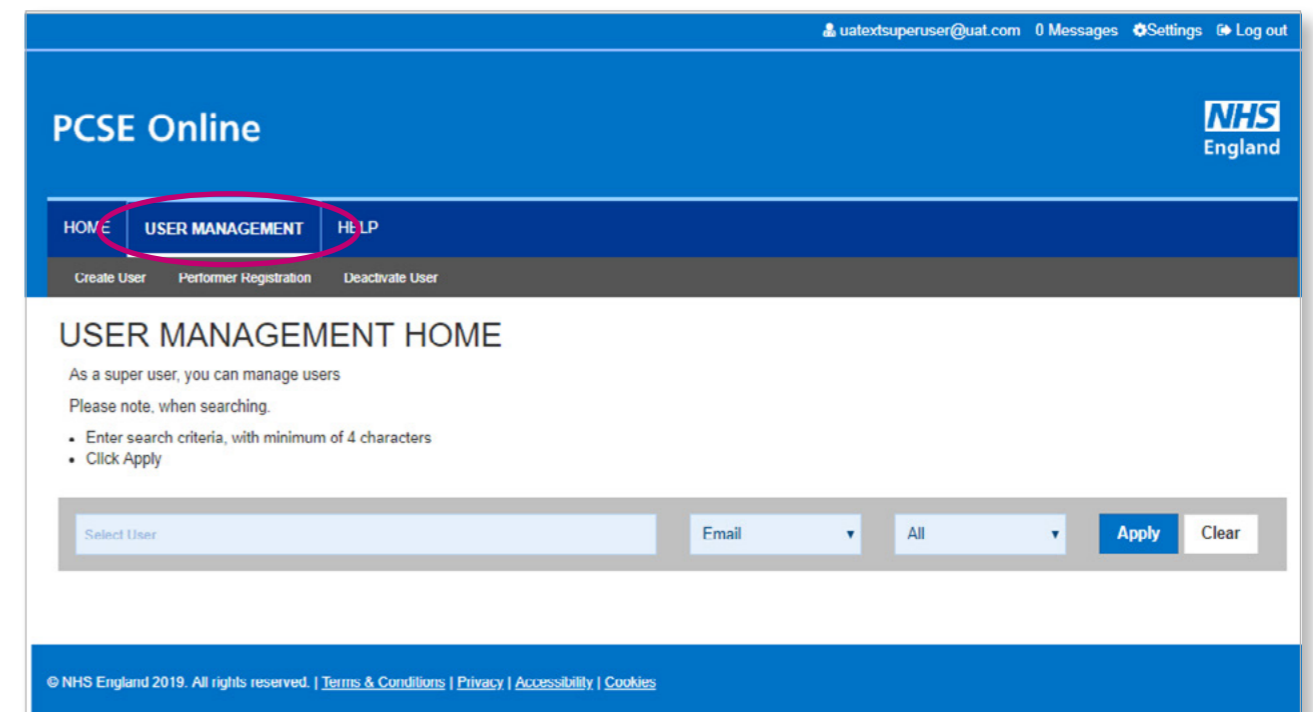
1. Administrator logs into PCSE online. Enter **email address** and **password**



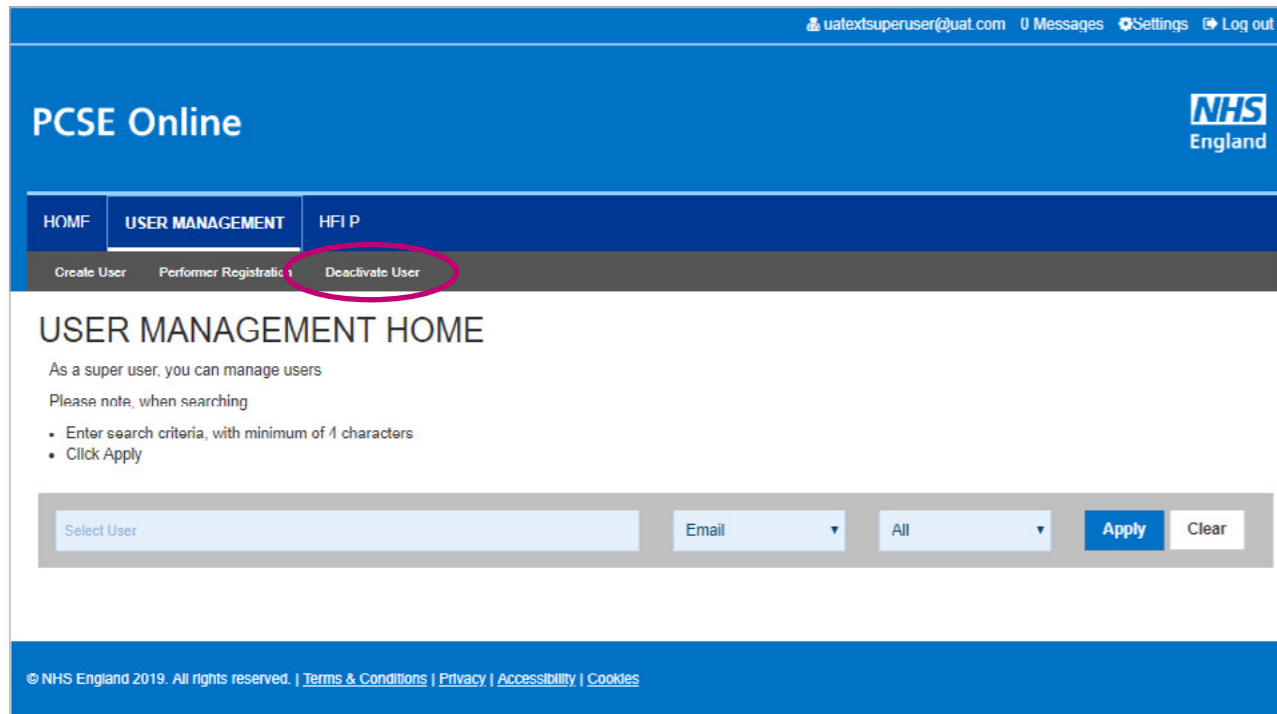
2. Access the User Management Landing Page



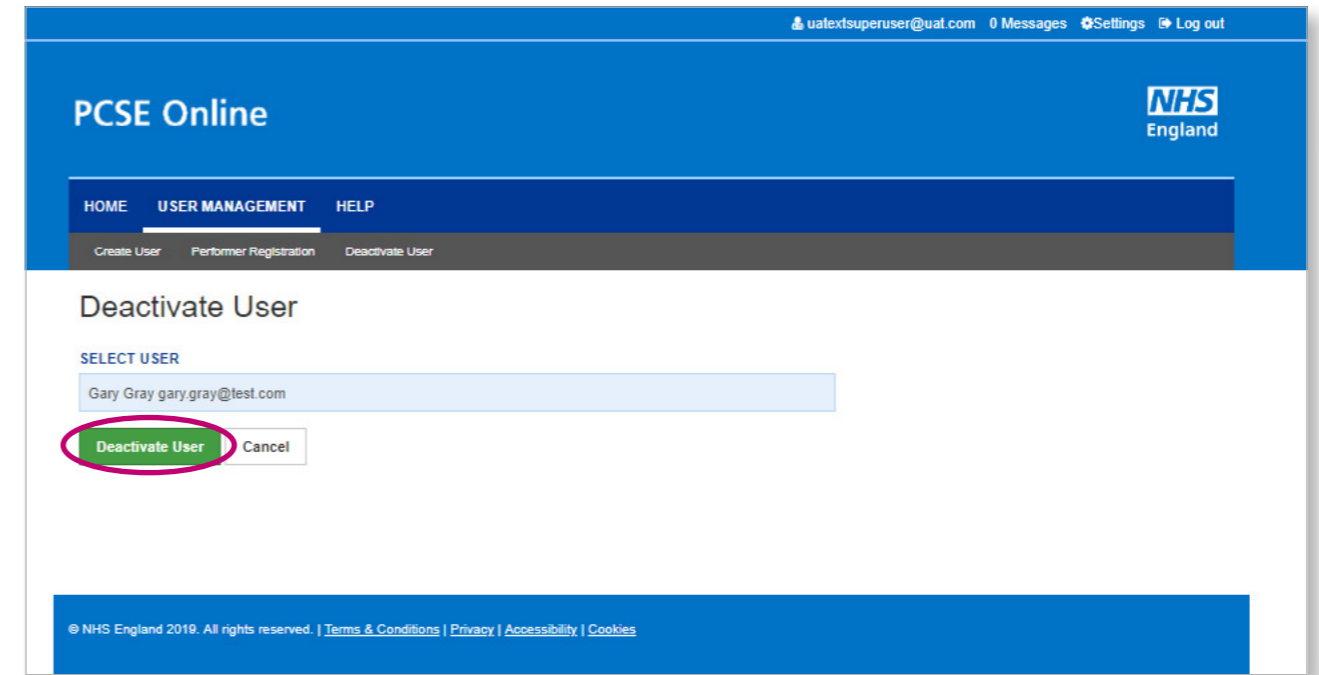
3. Click on 'User Management'



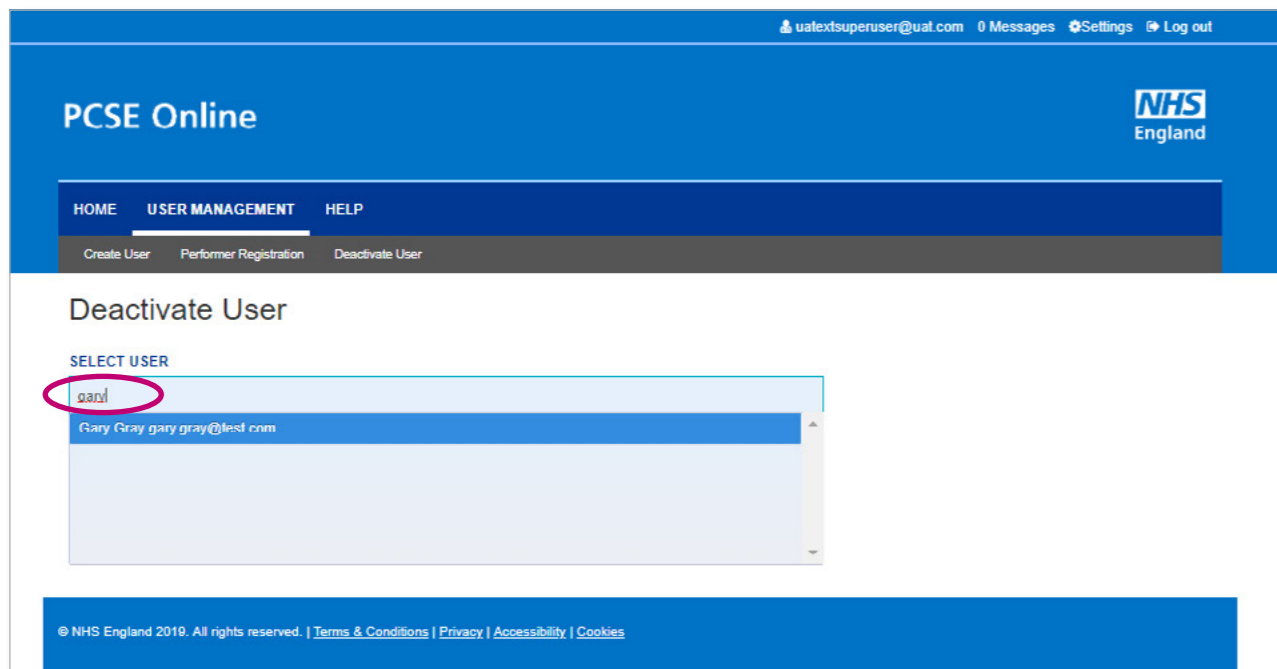
4. Click 'Deactivate User'



Check user name and click 'Deactivate User'



5. Enter User Name

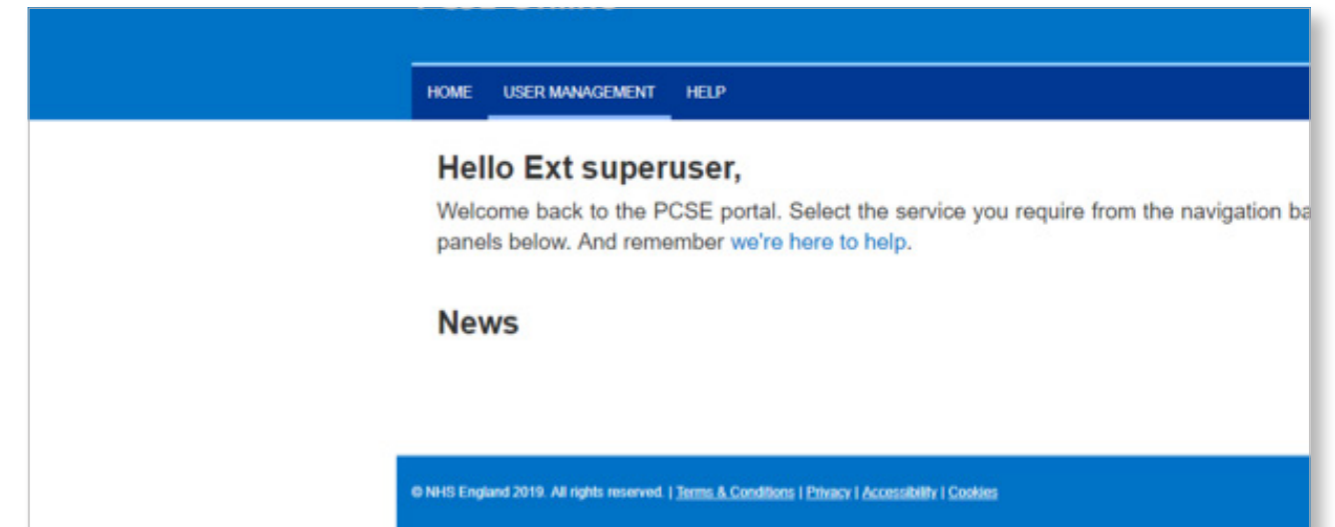


## 6. Editing User roles

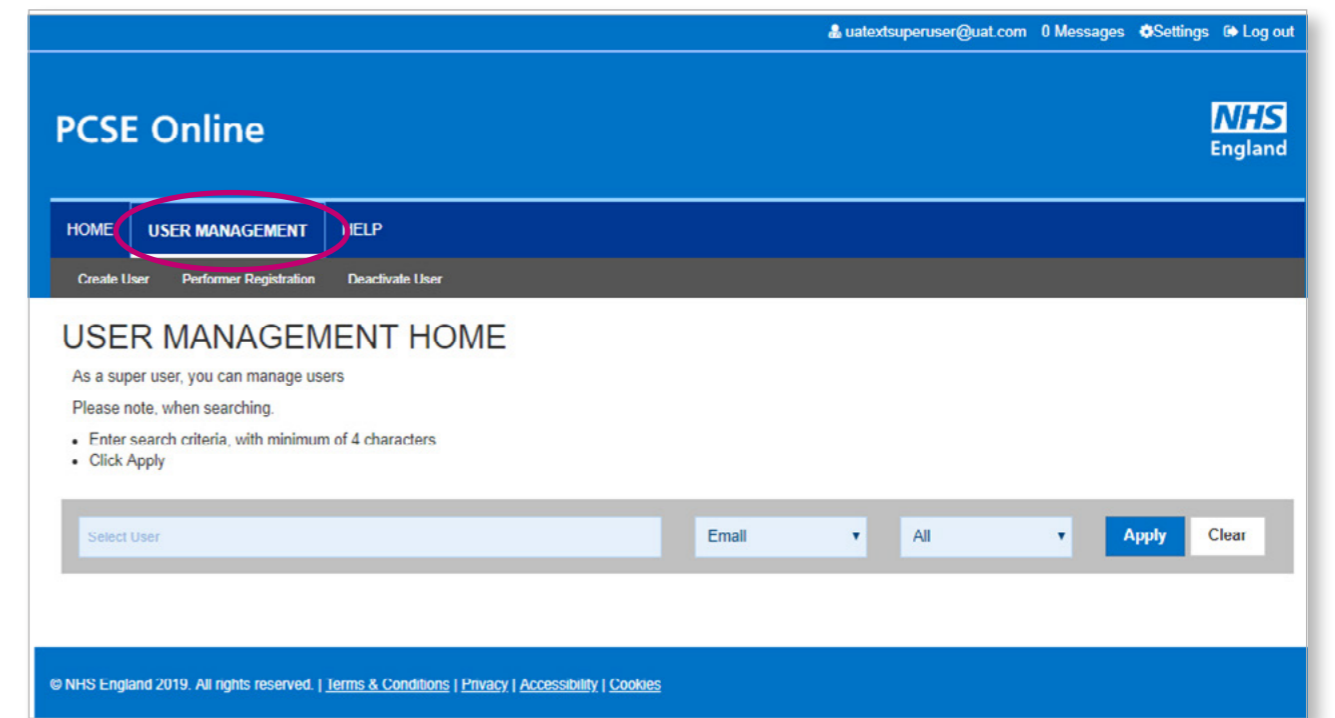
### Step by step guide for editing a PCSE Online user's role(s)

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

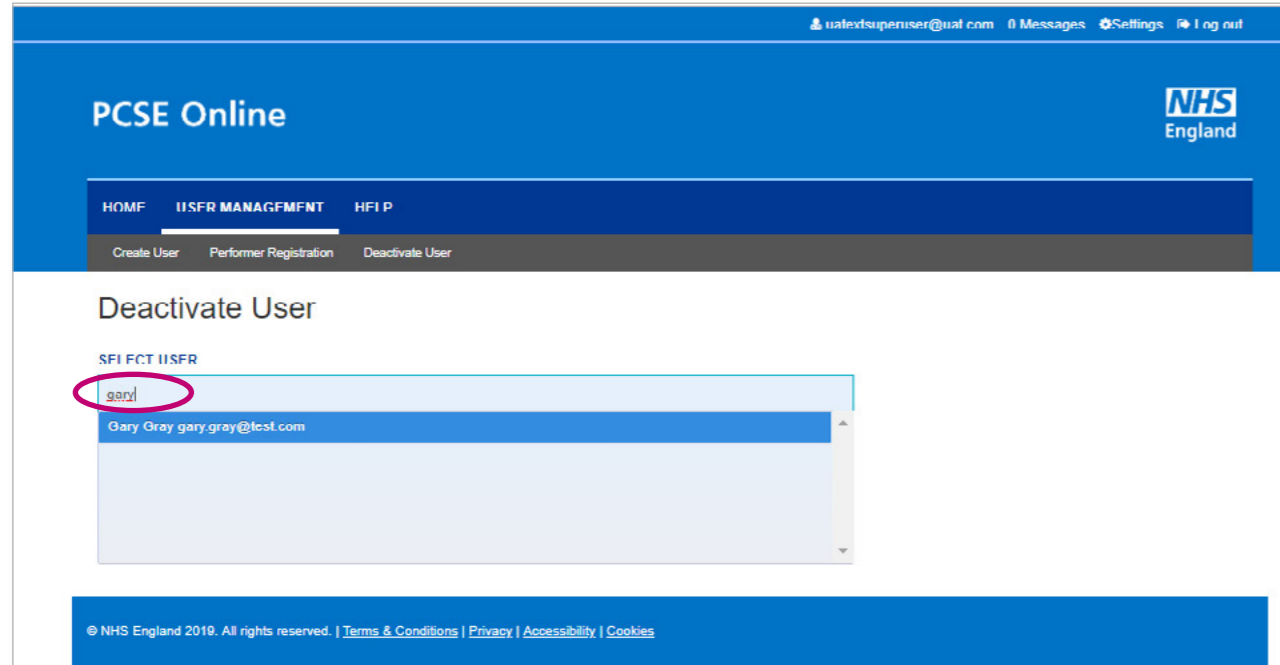
2. Access the User Management Landing Page



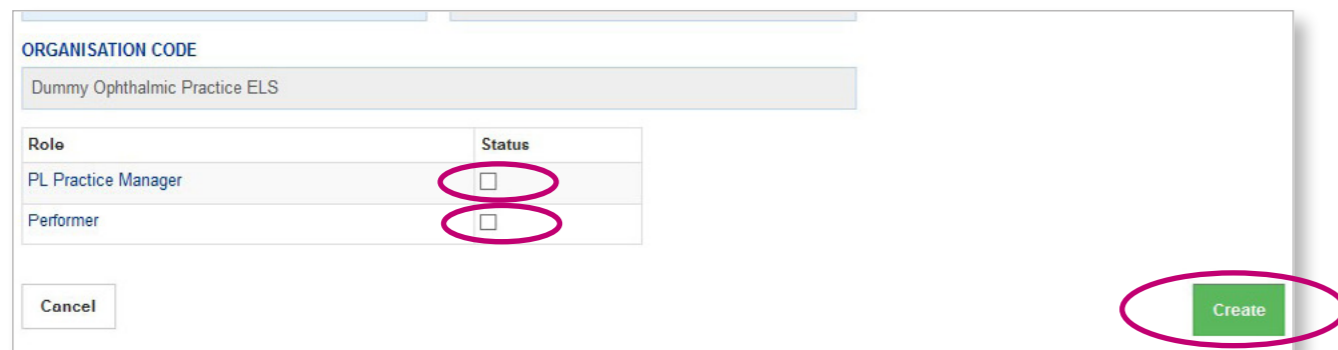
3. Click on 'User Management'



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



5. Tick the box for the appropriate role(s) and click on the **'Create'** button



## 7. Creating User accounts for staff without email

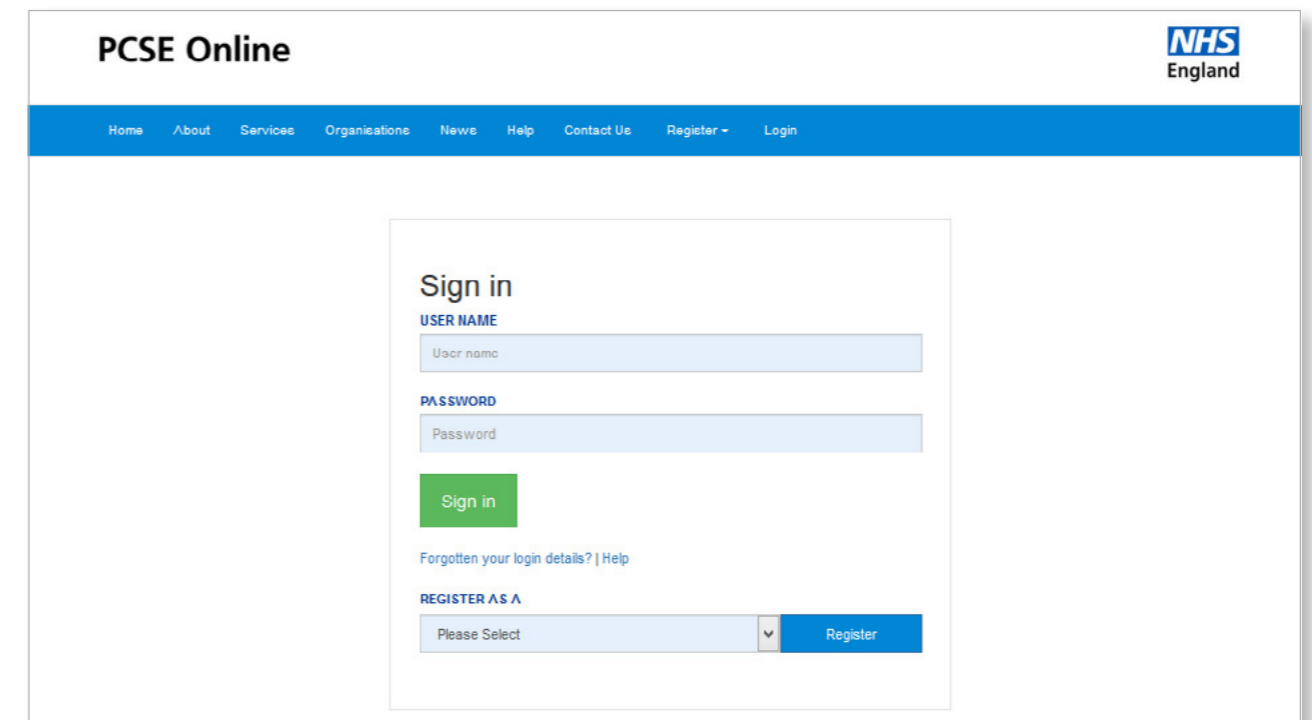
### Step by step guide to creating PCSE Online user accounts for practice staff who don't have an email account

For members of an optical practice team who do not have an email address they can use as their PCSE Online User Name, a practice User Administrator can create a PCSE Online account by following the steps below.

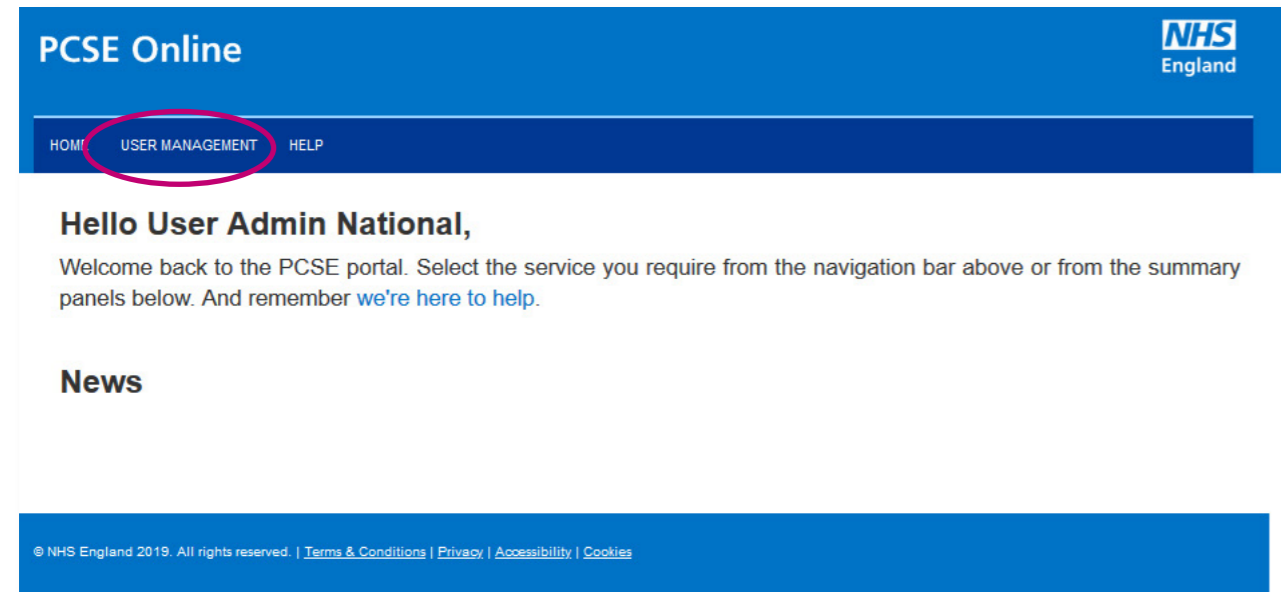
Please note Performers must have an email address and be registered for a portal account through the Performer Registration screen. See [guide].

#### 1. Create a PCSE Online Ophthalmic user with a user name that is not an email address

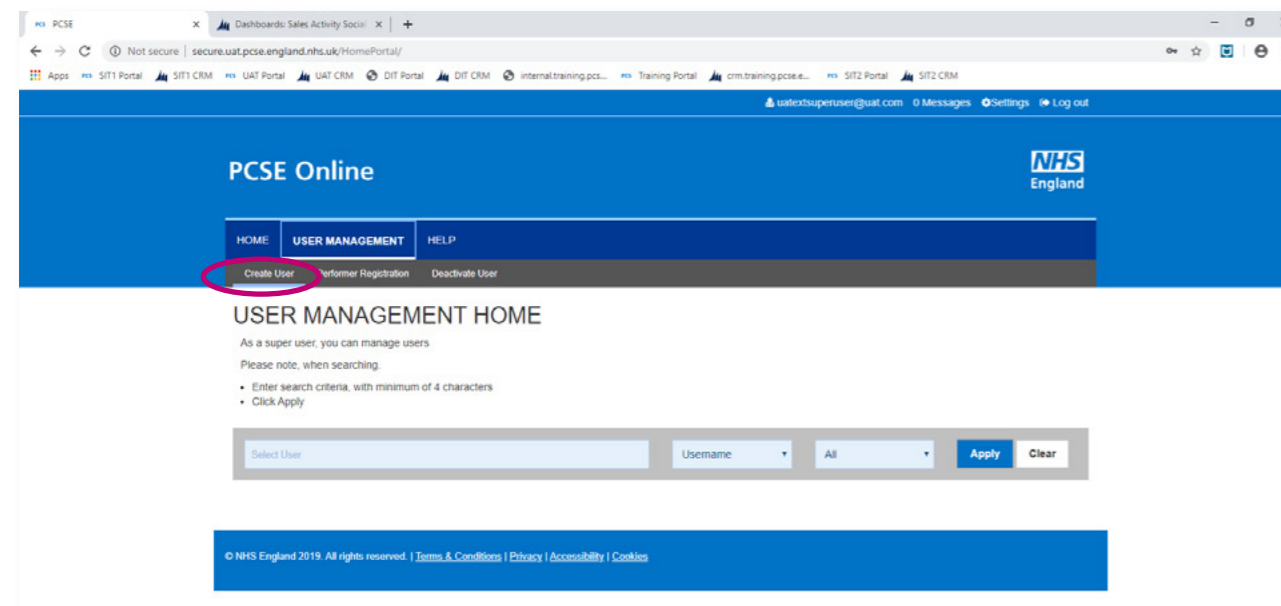
1.1 Ophthalmic User Administrator logs into PCSE Online



1.2 Select 'User management'

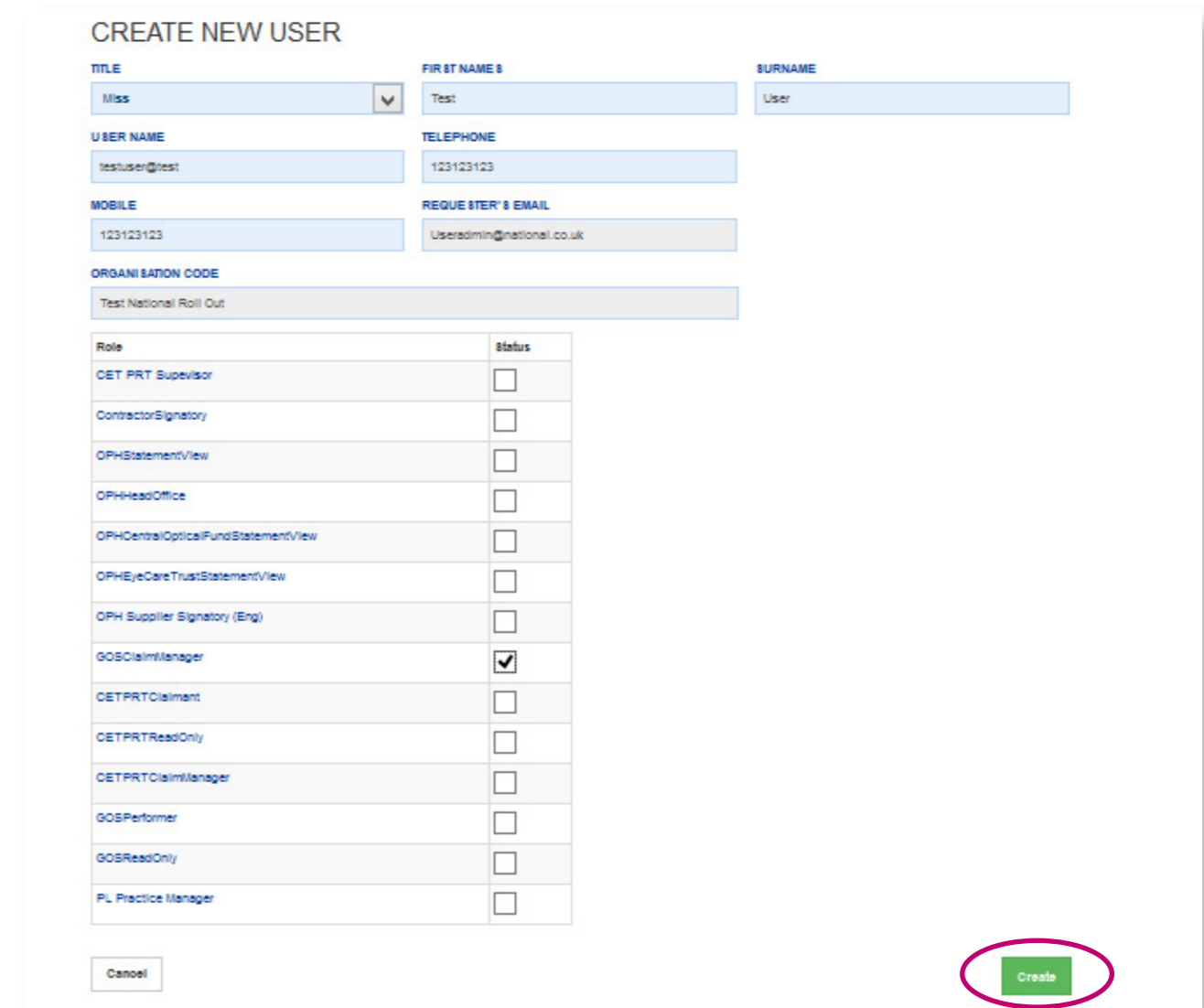


1.3 Select 'Create User'



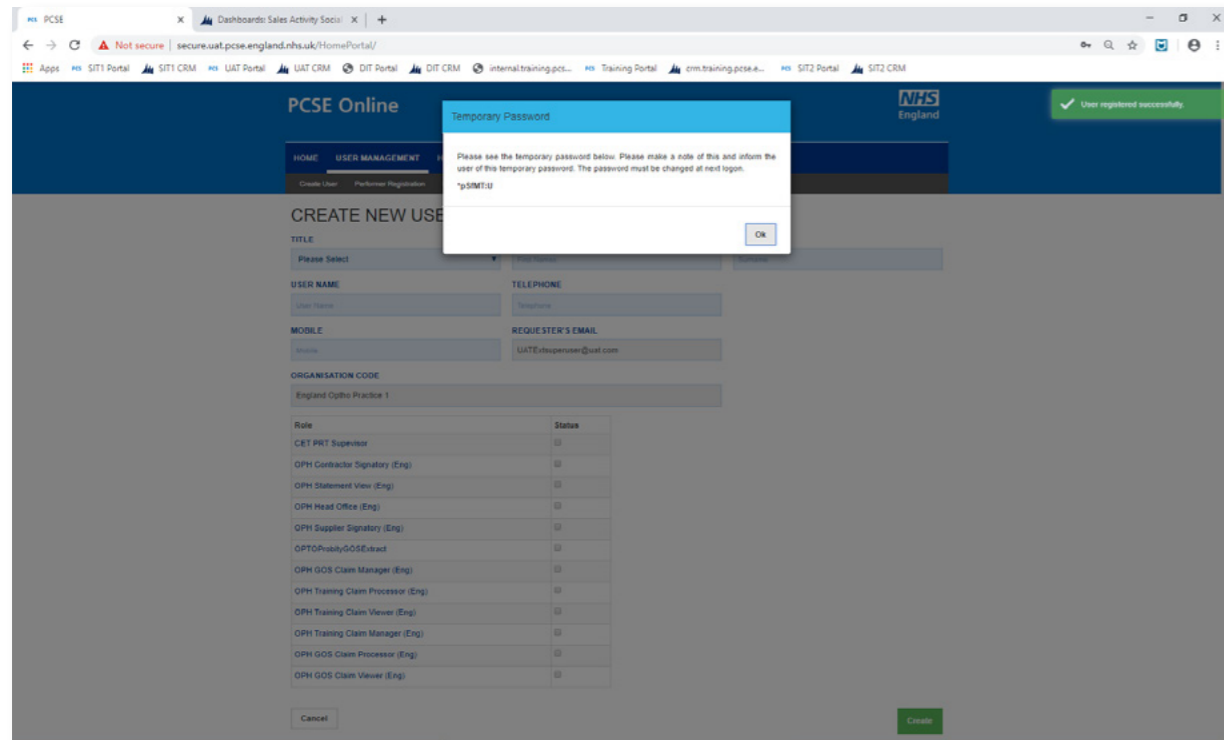
1.4 Enter user's details

- Suggested format for 'User Name': firstnamesurname@practicename e.g. jackbloggs@testoptician
- Select role(s) you want to allocate to the user and click 'Create'

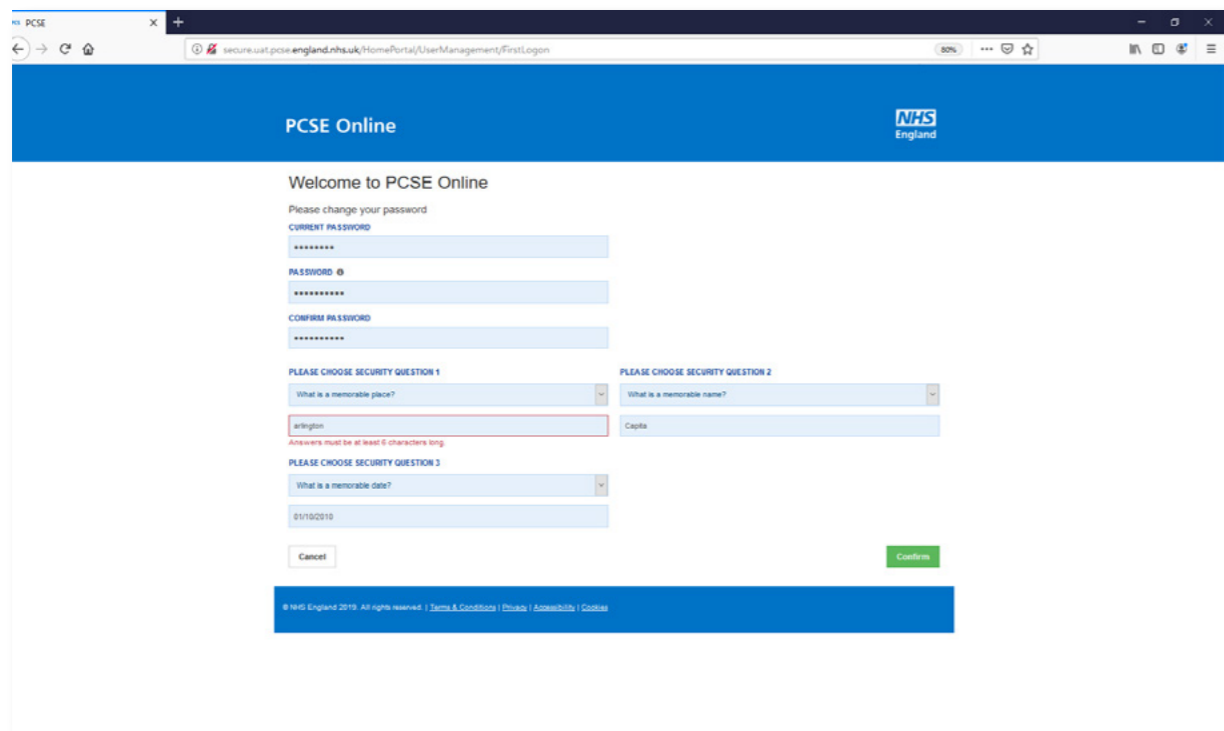




1.5 Make a note of the **Temporary Password** that appears in the pop up and pass it to the user

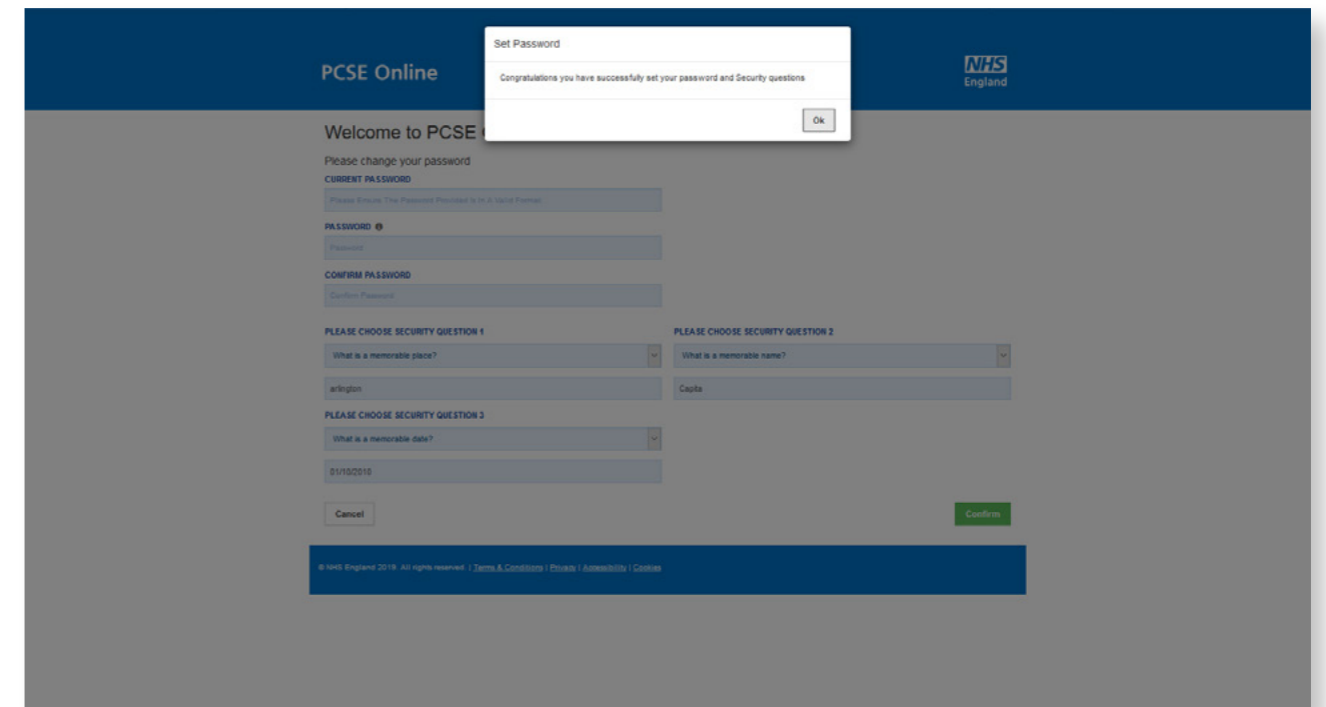


1.6 User logs in to PCSE Online with **User Name** the User Administrator has allocated then and the **Temporary Password**  
 – User enters answers\* to 3 security questions

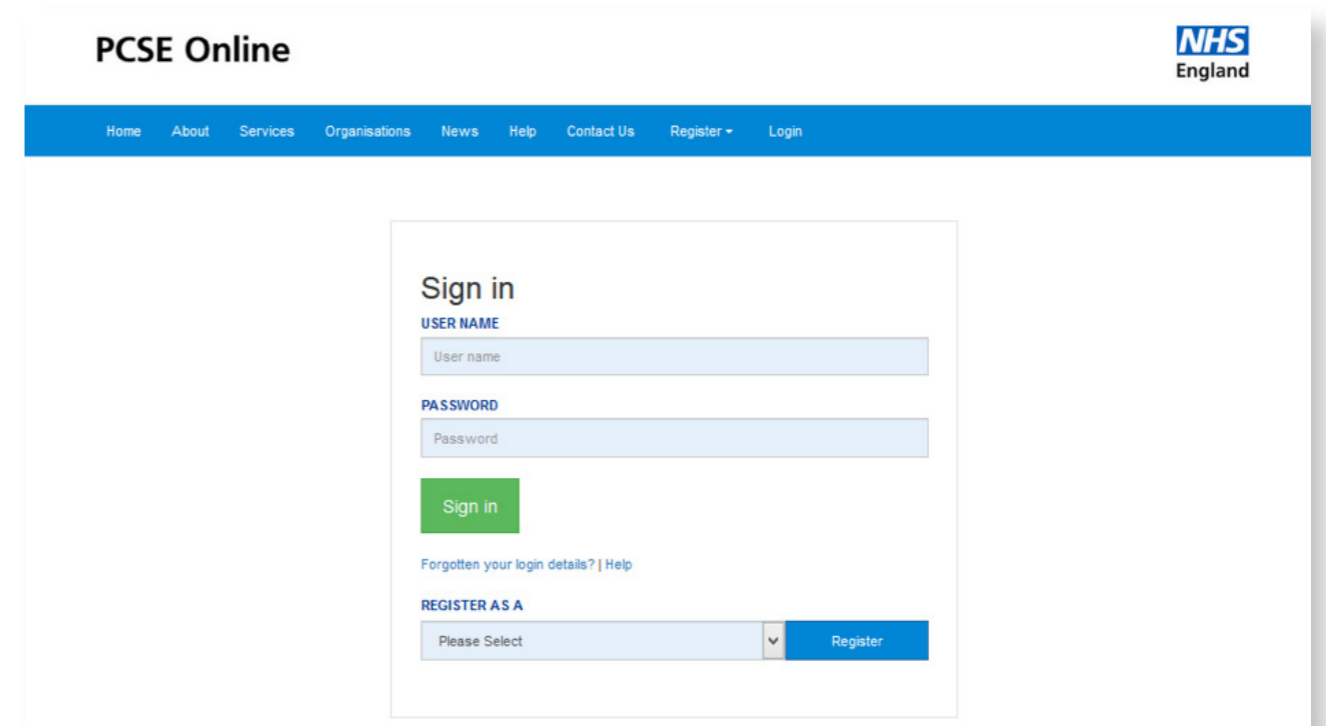


\*answers to security questions must be at least 6 characters long

1.7 Pop up message confirms user's new password has been saved



1.8 User can now log into to PCSE Online with **User Name** (non email) and **Password**





## Password reset for user without an email

2.1 Click **'Forgotten your log in details'** on the Sign in page

The screenshot shows the PCSE Online Sign in page. At the top, there is a navigation bar with links: Home, About, Services, Organisations, News, Help, Contact Us, Register, and Login. The NHS England logo is in the top right. The main content area has a 'Sign in' section with fields for 'USER NAME' (User name) and 'PASSWORD'. Below these is a green 'Sign in' button. A red circle highlights the link 'Forgotten your login details? | Help'. Below the sign in section is a 'REGISTER AS A' dropdown menu with 'Please Select' and a 'Register' button.

2.2 Enter **User Name** and click **'Reset Password'**

The screenshot shows the PCSE Online 'Forgot Password' page. It asks the user to answer two security questions. The first question is 'WHAT IS A MEMORABLE DATE?' with the answer '01/10/2010'. The second question is 'WHAT IS A MEMORABLE PLACE?' with the answer 'Arlington'. There are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is circled in red. At the bottom, there is a footer with copyright information: '© NHS England 2019. All rights reserved. | Terms & Conditions | Privacy | Accessibility | Cookies'.

2.3 Enter answers to the security questions and click **'Confirm'**

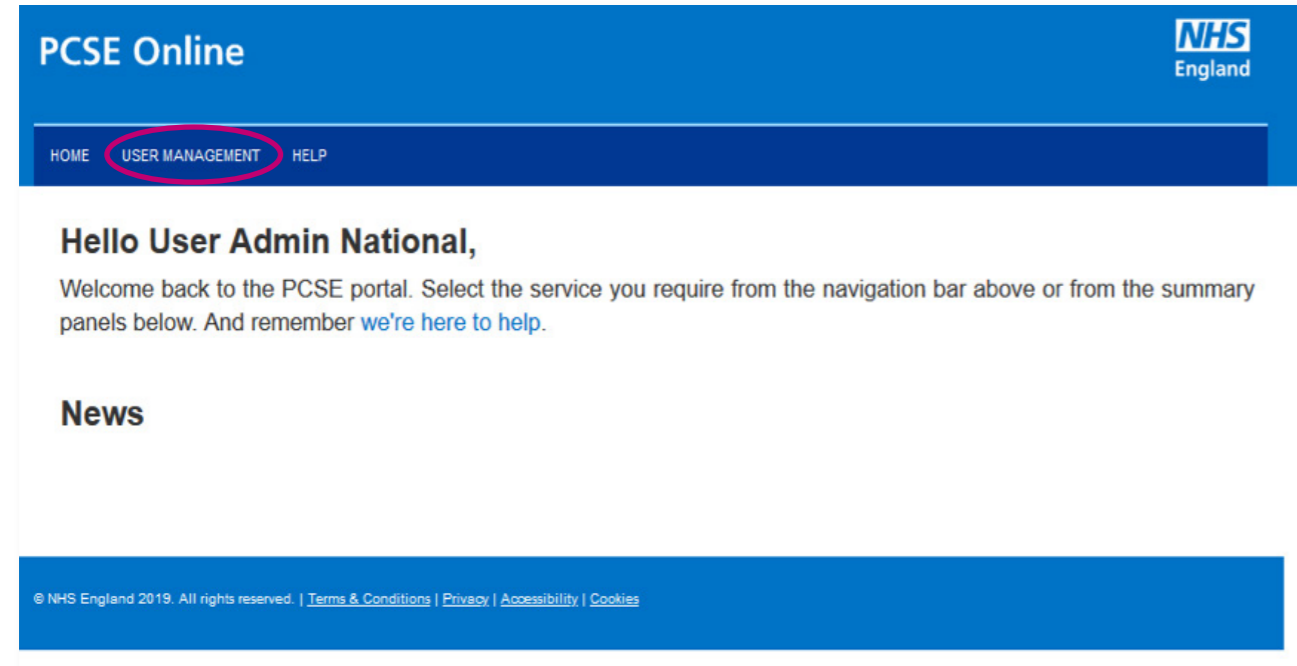
This screenshot is identical to the previous one, showing the 'Forgot Password' page with the 'Confirm' button circled in red.

2.4 Enter **New Password** and click **'Confirm'**

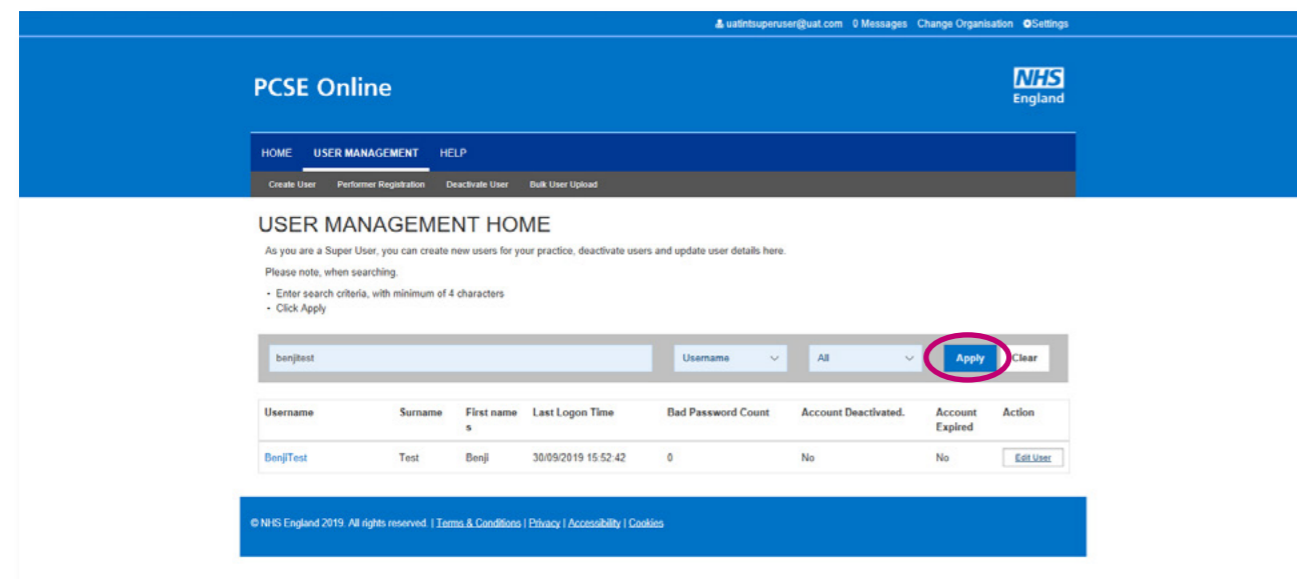
The screenshot shows the PCSE Online 'New Password' page. It has two input fields: 'PLEASE ENTER YOUR NEW PASSWORD' and 'PLEASE CONFIRM YOUR NEW PASSWORD'. Both fields contain asterisks. There are 'Cancel' and 'Confirm' buttons. The 'Confirm' button is circled in red. At the bottom, there is a footer with copyright information: '© NHS England 2019. All rights reserved. | Terms & Conditions | Privacy | Accessibility | Cookies'.

# User without an email is unable to complete Password Reset

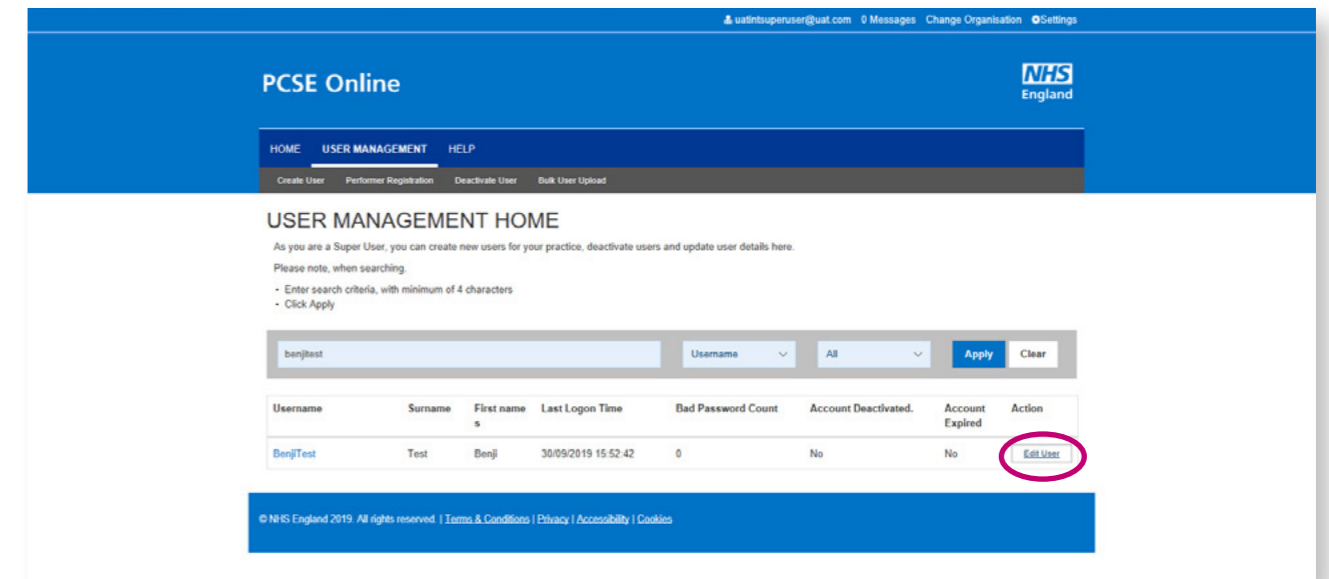
3.1 User Administrator logs into PCSE Online and selects 'User Management'



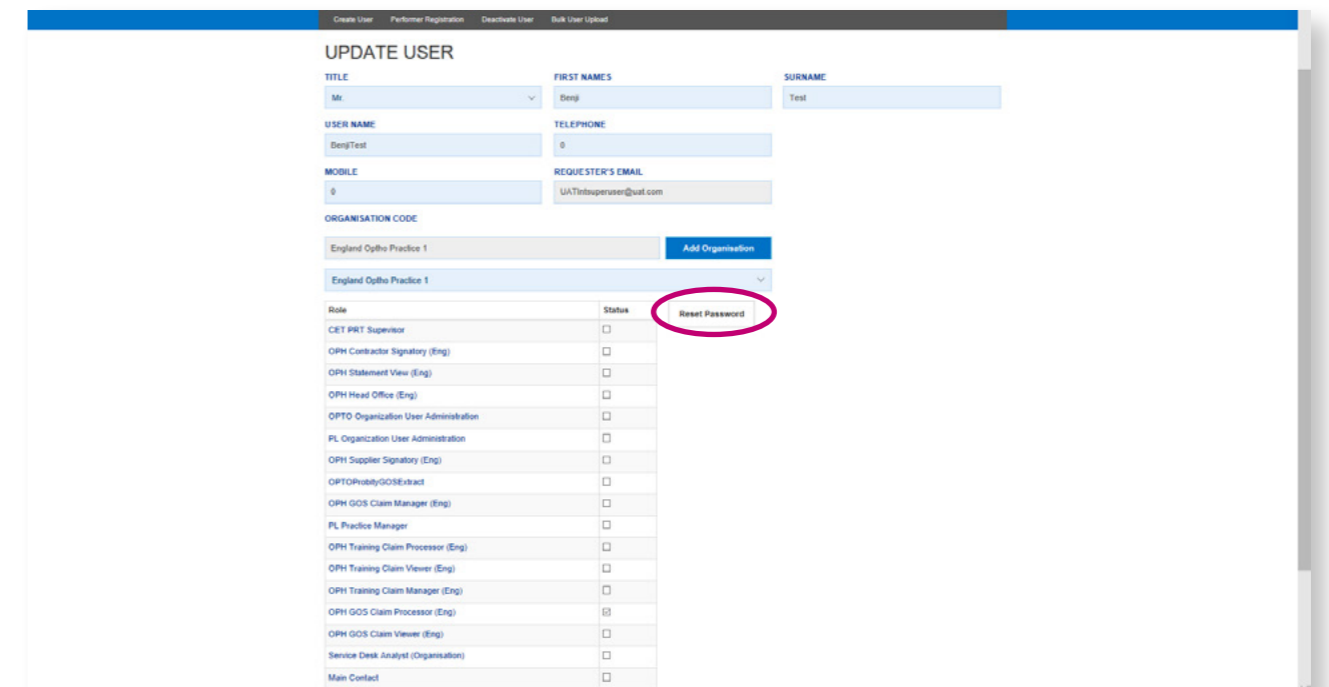
3.2 Enter User Name of user and click 'Apply'



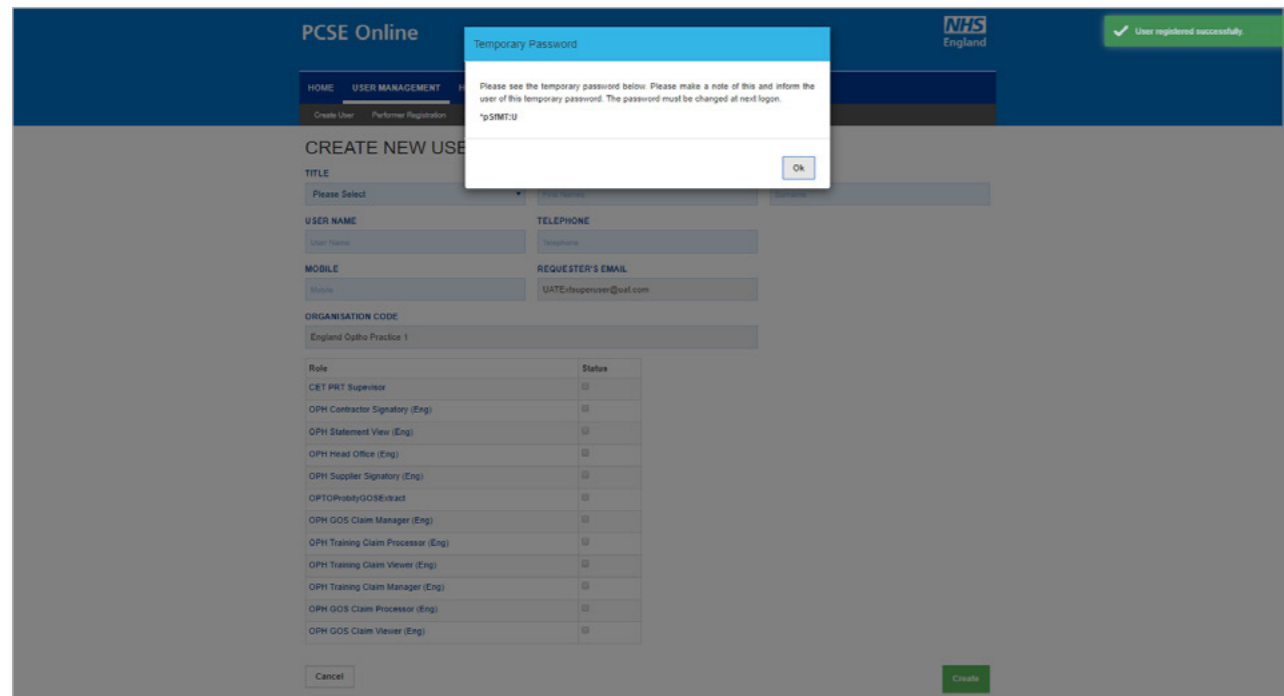
3.3 Click 'Edit User'



3.4 Click 'Reset Password'

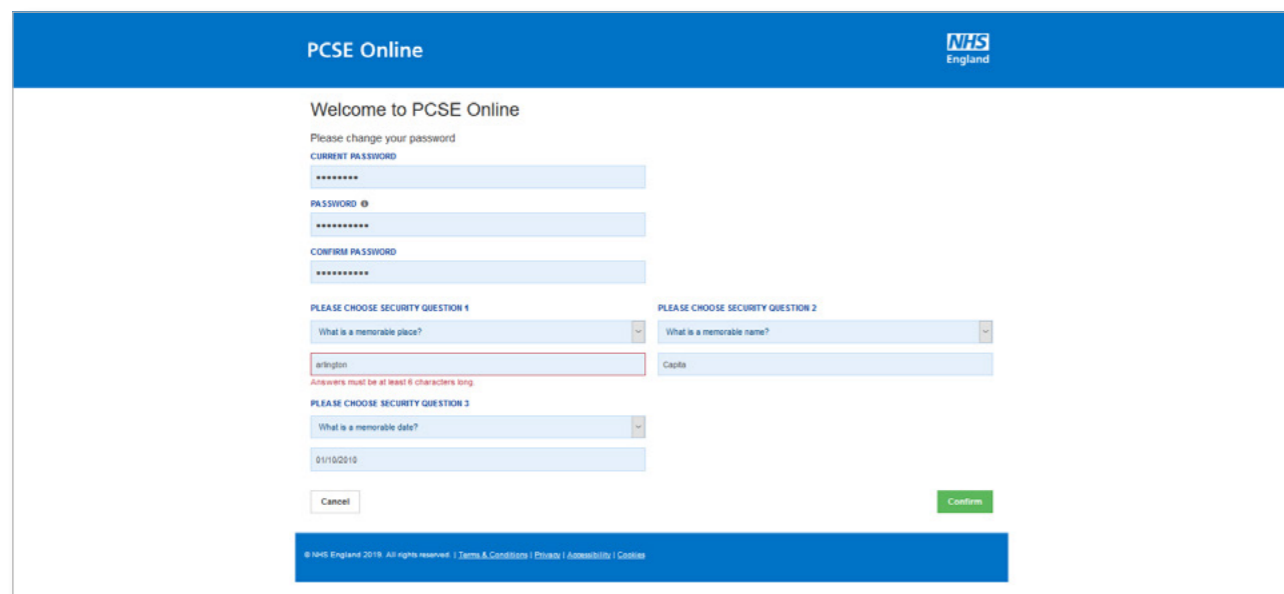


3.5 Make a note of the **Temporary Password** that appears in the pop up and pass it to the user



3.6 User logs in to PCSE Online with their **User Name** and the new **Temporary Password**

– User enters answers\* to 3 security questions



\*answers to security questions must be at least 6 characters long

3.7 Pop up message confirms user's new password has been saved

