



**Primary Care**  
Customer Services  
Handbook

**iSOFT**



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# Welcome

Welcome to the iSOFT Primary Care Customer Services Handbook. This guide provides the information required to contact the iSOFT Service Desk to log incidents and get help with your iSOFT solution. It details the various Service Desk numbers you can contact, the core hours of our standard service and the information that you need to consider prior to logging an incident with our Service Desk team.

This guide covers how your incident will be dealt with, from logging the incident, investigation of the issue, through to resolution and closure. Generic information about the severity of incidents, how to escalate problems if necessary and details of how any data provided to iSOFT is treated is also included.

The aim of this guide is to give you an overview of how the Service Desk works and to act as a quick reference when you need to contact us. Our teams are here to help you with product related issues and will be happy to provide further information around our Service Desk and the services iSOFT can provide.

For the latest information relating to telephone numbers, Service Level Agreements (SLA), hours of service and escalation details please refer to the iSOFT User Group portal.

[http://www.usergroups.isofthealth.com/groups/primary-care.](http://www.usergroups.isofthealth.com/groups/primary-care)

## How to contact Customer Services

There are a number of methods available to you for contacting iSOFT's Primary Care Customer Service team.

- web: <https://www.primarycaresupport.isofthealth.com/serviceportal>
- telephone our Service Desk: **0844 736 9433**
- fax: **0844 736 9434**
- international free phone number: **00800 47638 000 (00800 iSOFT 000)**
- email for general Primary Care enquiries: [primarycaresupport@isofthealth.com](mailto:primarycaresupport@isofthealth.com)
- email to report an incident: [support.health@isofthealth.com](mailto:support.health@isofthealth.com)  
To use this functionality you must be a registered user of the system, please email Customer Services using the general enquiry email address to request an account.



# About our Service Desk

The iSOFT Service Desk is our United Kingdom and Irish customers' main point of contact and is based in Banbury. Support cover times will depend on your individual contract, but standard support cover is 9.00am to 5.30pm, Monday to Friday and Saturday mornings, excluding English and Irish national holidays.

On telephoning iSOFT you will be presented with a number of menu options. Select the correct option and you will be connected to the Customer Service Team . If you get stuck, press \* to hear the options again.

iSOFT recognises that customers' time is valuable and with so many competing priorities, every spare moment is important. In order to streamline the support process, iSOFT has launched The Primary Care Incident Portal, through which non-business critical incidents can be raised without the need for customers to pick up the telephone.

Via the portal, customers can now:

- report an incident outside core hours
- check on the status of all incidents raised by your practice
- update existing incidents with additional notes and attachments to expedite resolution
- request progress updates on open incidents and close incidents if no longer relevant
- avoid calling the service desk at busy periods for non-severity 1 calls.

Registering an account:

In order to use the portal you must register to create an account and provide a password. Please email [primarycaresupport@isofthealth.com](mailto:primarycaresupport@isofthealth.com) with your preferred password ensuring that it complies with the following password criteria:

- 8 characters long (minimum)
- 1+ uppercase character
- 1+ lowercase character
- 1+ number
- 1+ special character (! £ % : ? etc).

The incident portal can be accessed via this link:


**<https://primarycaresupport.isofthealth.com/serviceportal>**

Please save the link into your favourites for easy access.

A tutorial video showing the operational features of the incident portal can be accessed via the help menu.

Please note that while we strongly advocate the use of this portal for non-business critical incidents, we recommend that all business critical incidents are telephoned into the Service Desk in the usual manner to ensure minimal practice downtime.

Please contact us at [primarycaresupport@isofthealth.com](mailto:primarycaresupport@isofthealth.com) with any queries.



# Details required when logging a new incident

When you log a new incident you are required to provide specific details relating to your issue.

It is essential that you include as much detail as possible and be prepared to give as a minimum the following information:

- details from your checklist investigations (see below)
- any messages appearing on screen with relevant screenshots which can be attached to the incident
- what was running when the error occurred or what was the last action you tried to perform?
- any recent upgrades to your system/hardware or third party applications/software that may have affected functionality
- **do not include any patient identifiable data.**

## Checklist prior to logging an incident

Check	Definition
<b>Incident contact</b>	This person should be available to approve remote access/system downtime and confirm incident closure when complete.
<b>Contact number</b>	The telephone number we can call you back on.
<b>Practice ID</b>	Your site code or NHS number.
<b>Product</b>	Which iSOFT product or system are you calling about?
<b>Name of the server or workstation affected</b>	The computer name as stored in the Windows system properties.
<b>Version confirmation?</b>	Are you logging the call on the current version of the product?
<b>Did it work?</b>	Has this function worked before? If so, when?
<b>Any changes?</b>	Has anything else changed (PC, network, new system or new functionality?)
<b>Process?</b>	Can you describe the process that generated the error (ideally exact keystrokes)?
<b>Impact?</b>	Do you know the impact of this on your business and have you stated this on the issue?
<b>Urgency</b>	How severe is your problem?
<b>More than one PC?</b>	Does this happen on more than one PC or terminal, can it be repeated?
<b>More than one user?</b>	How many users are affected?
<b>More than one site?</b>	Does this happen at your main and/or branch site?
<b>System access</b>	Will you give us access to connect to your system? Please advise if there are any time constraints?



# Completion of incident log details


It may be necessary to refer to the severity indicator summary as shown below. It is important to note that the actual severity levels in your contract may differ slightly from these standard definitions.

Upon reporting a new incident you will be issued with a unique incident reference number, which should be noted for future reference and progress checks.

## Classification of severity levels

The following table summarises the standard severity levels:

Severity/Priority	Fault	Description
1	<b>System unavailable</b>	Users cannot log in, the clinical application is completely unavailable.
2	<b>Major fault</b>	Business critical clinical application function or group of functions is unavailable, inaccessible or operating incorrectly
3	<b>Minor fault</b>	Non business critical clinical application function or group of functions is unusable, inaccessible or operating incorrectly.
4	<b>Residual fault</b>	Clinical application has a fault but continues to be usable, or system error has left data corruptions or referential issues which require correcting.
5	<b>Other faults</b>	General queries.



# How your incident will be dealt with

Once you have submitted details of your incident or request you will be given a unique incident reference number. The details logged will then be verified and reviewed prior to the investigation commencing.

If the incident has been identified as a software fault it will be scheduled for either a future planned software release or an emergency software release. The incident log will be updated with these details and wherever possible a temporary workaround will be supplied until the new software release is available.

## **Closing an incident**

Your incident will be marked as resolved once iSOFT has supplied a solution. This incident **will not be closed** until you confirm the solution has resolved your incident. Please be advised that this solution may be a temporary work around until a permanent fix is available.

You are able to close incidents yourself using the Primary Care Incident Portal;  
**<https://primarycaresupport.isofthealth.com/serviceportal>**.

## **Customer satisfaction survey**

On a monthly basis iSOFT conducts a customer satisfaction survey by selecting 25% of the customers who have had an incident closed in the previous month. As no customer will be asked to complete the survey more than once in any rolling six month period, we do ask that you complete the survey when selected as your feedback is very important to us and is used to prioritise service improvements.



# Escalation procedures

Incidents may be escalated using the iSOFT contact details outlined in this document; it is recommended that escalations be telephoned through the Customer Service Desk.

The first point of escalation should be the Customer Service Team Leader responsible for your product or service. Where your contract includes an allocated Customer Liaison Officer (e.g. for a managed service), this is your second point of escalation, otherwise the Customer Service Manager responsible for the product or service concerned will deal with the escalation.

Contact Name	Telephone	Mobile	Email
<b>Amandeep Sidhu</b> Customer Service Team Leader or	01295 274 464	07808 092718	amandeep.kaurSidhu@isofthealth.com
<b>Lee Hickman</b> Customer Service Team Leader Then	01295 274 371	07887 826564	lee.hickman@isofthealth.com
<b>Sarah Elliott</b> Customer Liaison Officer Then	01295 274 533	07771 504353	sarah.elliott@isofthealth.com
<b>Jon Lucas-Garner</b> Customer Service Manager Primary Care Then	01295 274 258	07917 175250	jon.lucas-garner@isofthealth.com
<b>Steve Bateman</b> Head of Customer Services - Europe North Then	01295 274 471	07717 426934	steve.bateman@isofthealth.com
<b>Paul Meskill</b> Primary Care Project Director Then	0844 736 942008	0797 000 2611	paul.meskill@isofthealth.com
<b>Mark Thornton</b> Operational Services Director UKI	01295 274 299	07976 543279	mark.thornton@isofthealth.com

Full details of the escalation procedure details can be found on the iSOFT Primary Care User Group portal:  
<http://www.usergroups.isofthealth.com/groups/primary-care>



# Support confidentiality

Any requirements to confirm the confidentiality or data protection policies should be forwarded to the Head of Customer Service. In order to investigate incidents it is often necessary to access your system. All details relating to remote access and passwords are treated in strictest confidence. All records containing such information are maintained in a secure environment by the Customer Service team. Changes to access codes should be notified to the Customer Service team. iSOFT will not pass on any details of this information to any third party without prior customer approval.

**Customers must NOT attach any documents containing patient identifiable data, or make updates that include patient identifiable data, to any incident record. This would be a breach of your Data Protection Act responsibilities.**

## **About iSOFT Group**

iSOFT Group Limited (ASX: ISF) is the largest health information technology company listed on the Australian Securities Exchange, and among the world's biggest providers of advanced application solutions in modern healthcare economies.

iSOFT works with healthcare professionals to design and build software applications that answer all of the difficult questions posed by today's healthcare delivery challenges. Our solutions act as a catalyst for change, supporting free exchange of critical information across diverse care settings and participating organisations.

Today, more than 13,000 provider organisations in over 40 countries use iSOFT's solutions to manage patient information and drive improvements in their core processes. The group's sustainable development is delivered through careful planning, in-depth analysis of the market, and anticipation of our clients' evolving requirements.

A global network of iSOFT subsidiaries, supported by an extensive partner network, provides substantial experience of national healthcare markets. As a result, we offer our clients comprehensive knowledge of local market requirements in terms of culture, language, working practices, regulation and organisational structure.

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