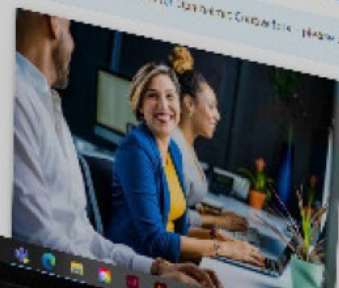


Primary Care Support England

Home About Us Services My Account Help Contact Us Register / Login

Find out more about GP Practices



PCSE Online



User Management

Version V.7 - September 2023

NHS

England

Primary Care Support England

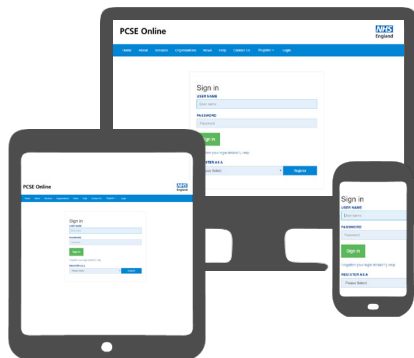
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Introduction

Those with the User Management permission in PCSE Online are responsible for assigning permissions to other users within their organisation.

This guide will show you how to navigate the User Management processes in PCSE Online.

PCSE Online can be accessed from PCs, laptops, tablets and mobile phones, so users are not limited to being connected to an office network. It is important to manage the users you have at your organisation and if they leave your organisation, you should deactivate them. This will ensure that users who are no longer part of your organisation cannot complete transactions or access your organisation information. If a user registers with a new organisation using the same email address, they will only have access to the information for their new organisation



You may already have a User Administrator role for another PCSE Online service:

- **Performer List User Administrator**
- **Supplies and Records Main Contact**

These roles do not automatically include GP Payments and Pensions admin rights. If you do not see the option to assign GPPP roles, you are not the GPPP User Administrator for your practice

Contents

If there is a specific section in this guide that you would like to see, please **click** one of the icons below to be taken straight to that section.

	User Management landing page
	Create a new user
	View the PCSE Online users in my practice
	Amend a user's permissions
	Deactivate a user
	PCSE Online Role Descriptions
	Further support

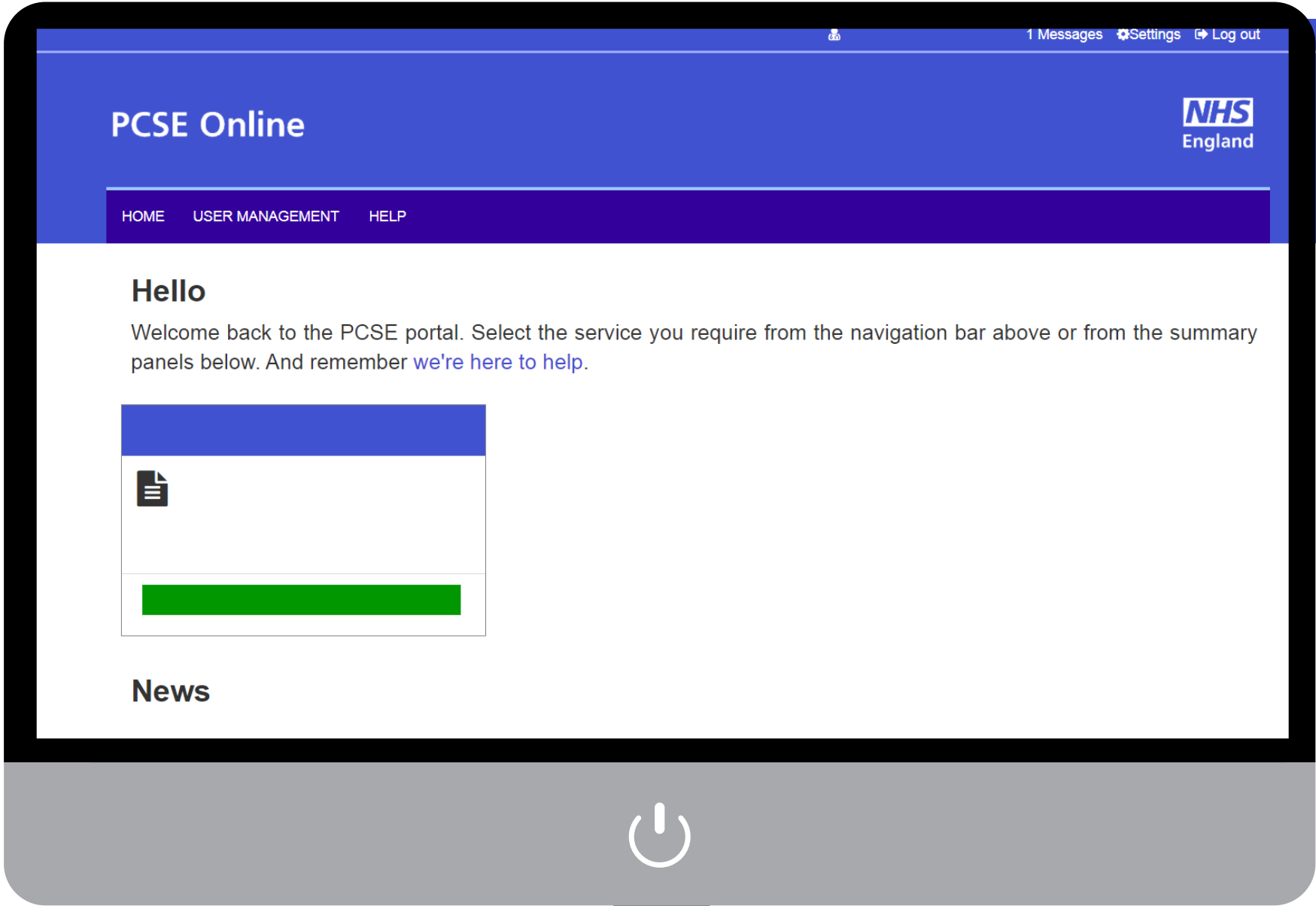


User Management landing page

Log in to PCSE Online using your email address and password.

Those with the User Management permission in PCSE Online will have a User Management option in the dark blue ribbon towards the top of the screen.

Click on the magnifying glass icons to see more information.





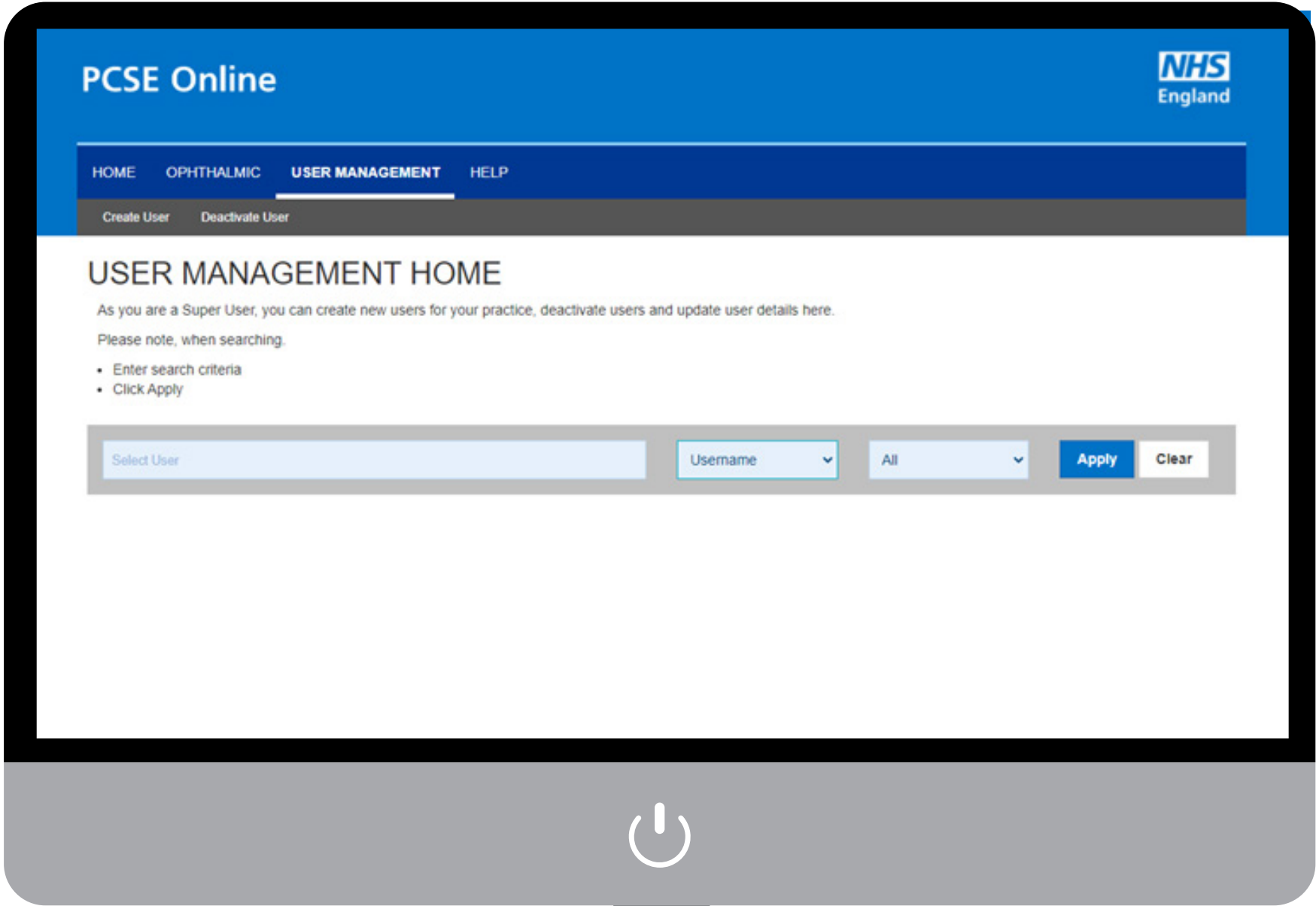
User Management landing page

In the grey ribbon, you now have the option to:

- **Create User**
- **Deactivate User**

You can also search for an existing user in the search bar.

Click on the magnifying glass icons to see more information.



Create a new user

- Log into PCSE Online
- Select Create User
- Complete all the light blue boxes
- Grey boxes will be automatically completed

This is also the process to follow if you wish to give an accountant access

Scroll down the page to select the permissions you wish to grant to this new user.

Please note: A pop up message will appear when you click **Create New User**. It will ask you confirm if the new PCSE Online user is a Performer or not.

If you click **Yes**, you are taken directly to the Performer Registration screen. If you click **No**, you will be taken to the Create New User page.

Remember! If you wish to create an account for a Performer, you need to use the Performer Registration page.

Click on the magnifying glass icons to see more information.

PCSE Online

NHS England

HOME

OPHTHALMIC

USER MANAGEMENT

HELP

Create User

Deactivate User

CREATE NEW USER

TITLE

Please Select

FIRST NAMES

First Names

SURNAME

Surname

USER NAME

User Name

TELEPHONE

Telephone

MOBILE

Mobile

REQUESTER'S EMAIL

internaladmin@sit4.com

ORGANISATION CODE

Organisation Code

List of available roles will populate once Practice is selected

Role	Status
Main Contact	☐

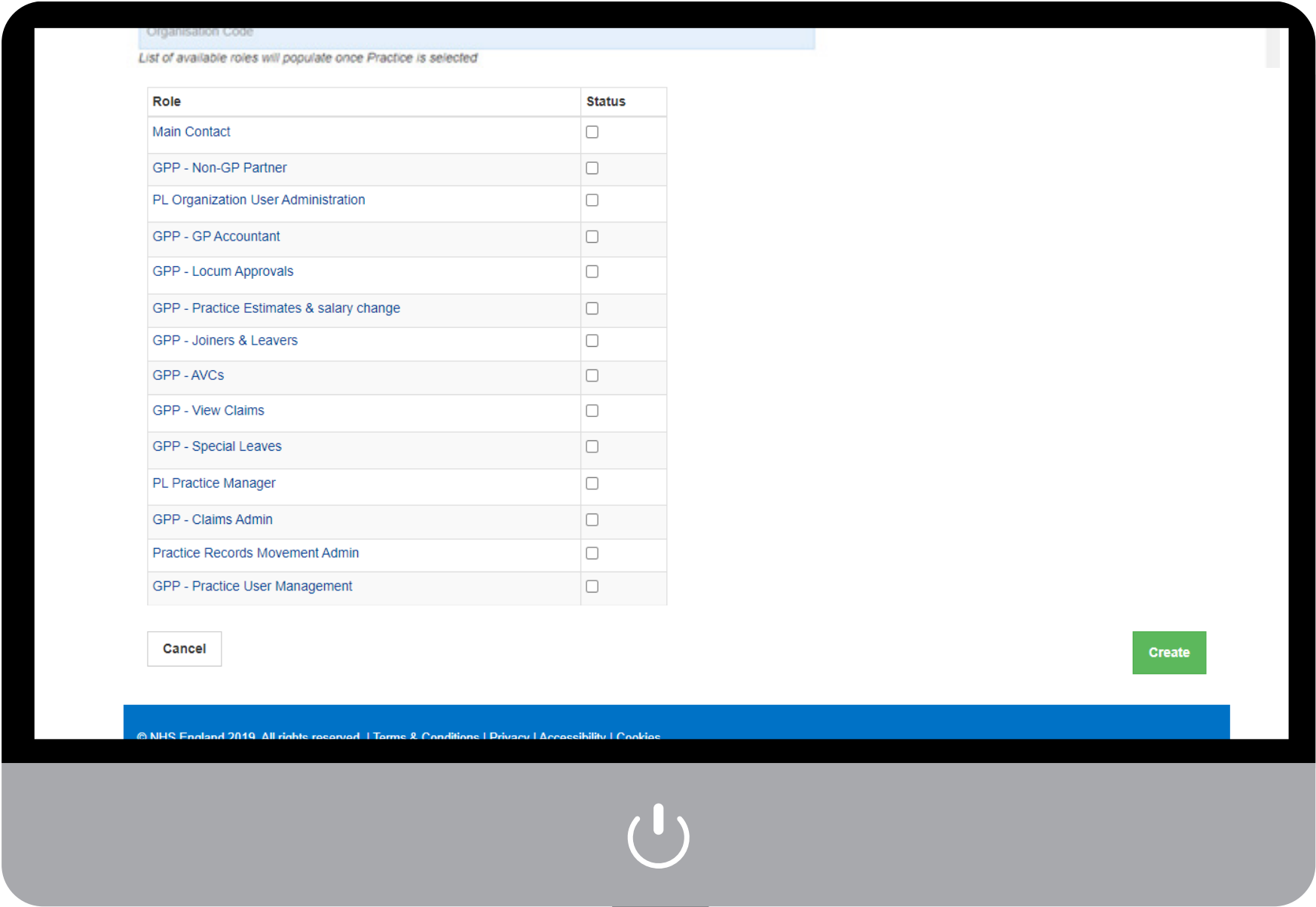
Create a new user

Tick the boxes under the status column to grant the user this permission. Take care to only grant suitable permissions.

Once the user has been given all the suitable permissions, click the create button.

How to create a new user
1m 10s

Click to play the video



How can I view the PCSE Online users in my practice?

In PCSE Online, you will be able to see a list of all the PCSE Online users registered with your Practice/Organisation.

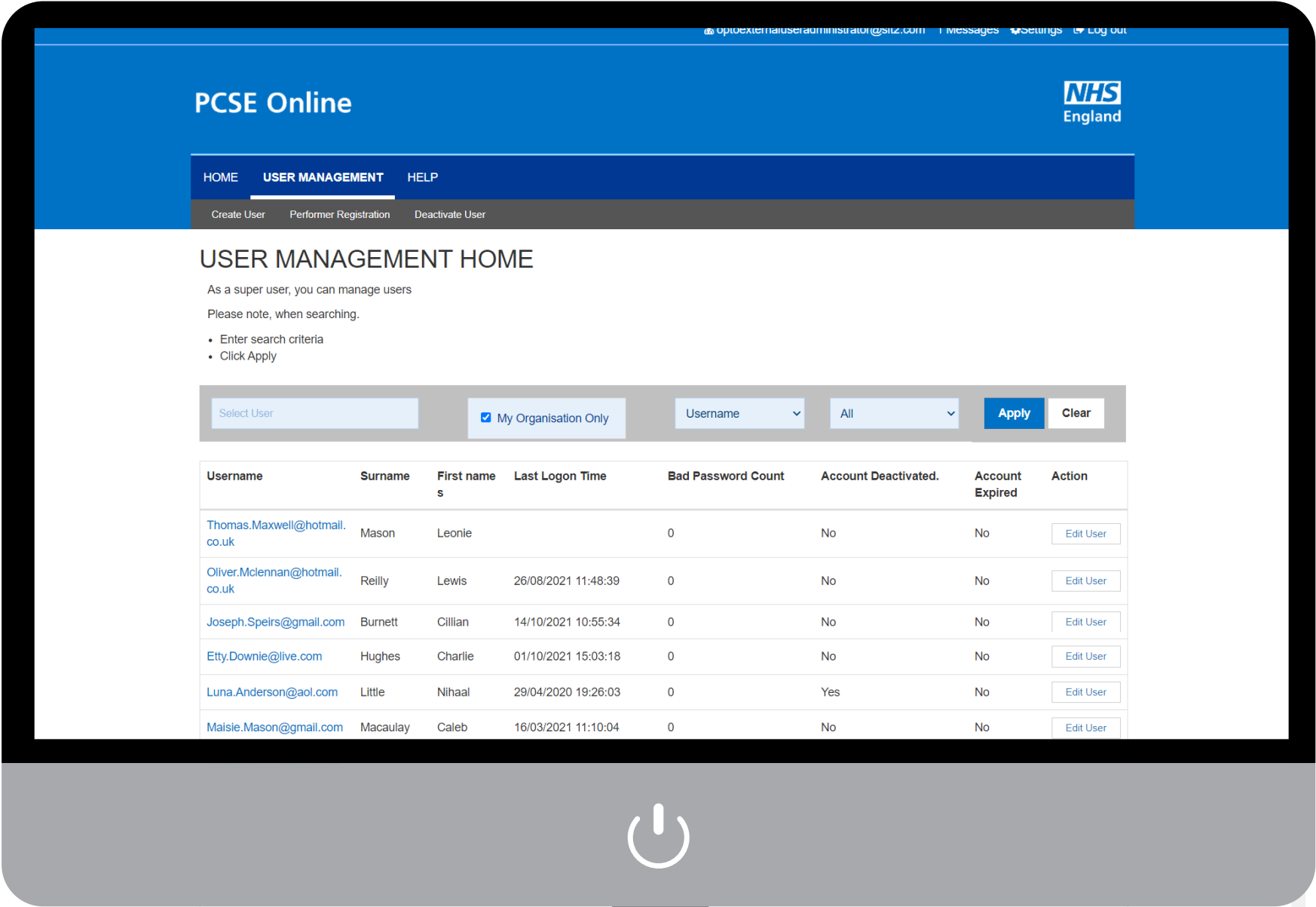
To do this, you will need to:

- Log into PCSE Online
- Click User Management
- Complete all the light blue boxes
- Grey boxes will be automatically completed

You will now be on the User Management search screen.

Please note! It is the practices responsibility to manage their PCSE Online users (**current and previous**) PCSE is not responsible for the removal or edits of registered practice users.

Click on the magnifying glass icon to see more information:





How to amend a user's permissions

You can amend a user's details, as well as assign and remove existing permissions in PCSE Online.

To do this, log in to PCSE Online and click on the User Management tab.

Search for the user by entering either their:

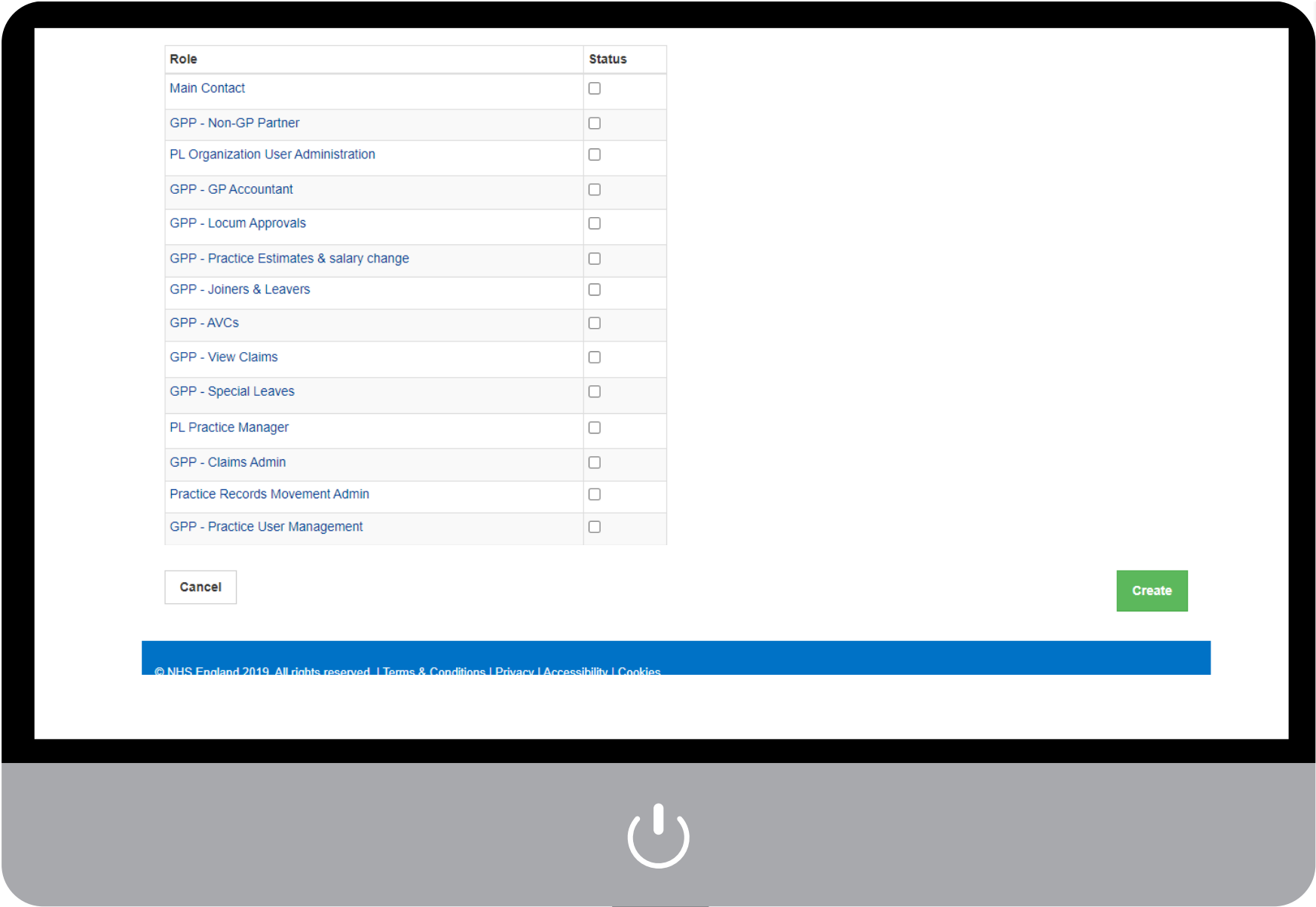
- **User name (email address search is recommended)**
- **Forename**
- **Surname**

Once entered, click enter. You should now be able to see the user's profile.

Click on the magnifying glass icons to see more information.

How to amend a user
1m 22s

Click to play the video



Deactivate a user

You can deactivate any users who have left your organisation or no longer require access to PCSE Online.

Any leavers who move to a similar organisation may use their same email address and it's important that you remove their access to your organisation.

If you deactivate a user in error, you will need to go back to the user management tab and then enter the user's email address, then edit the user from there. You will then select the roles they require and click on the update button.

To deactivate a user:

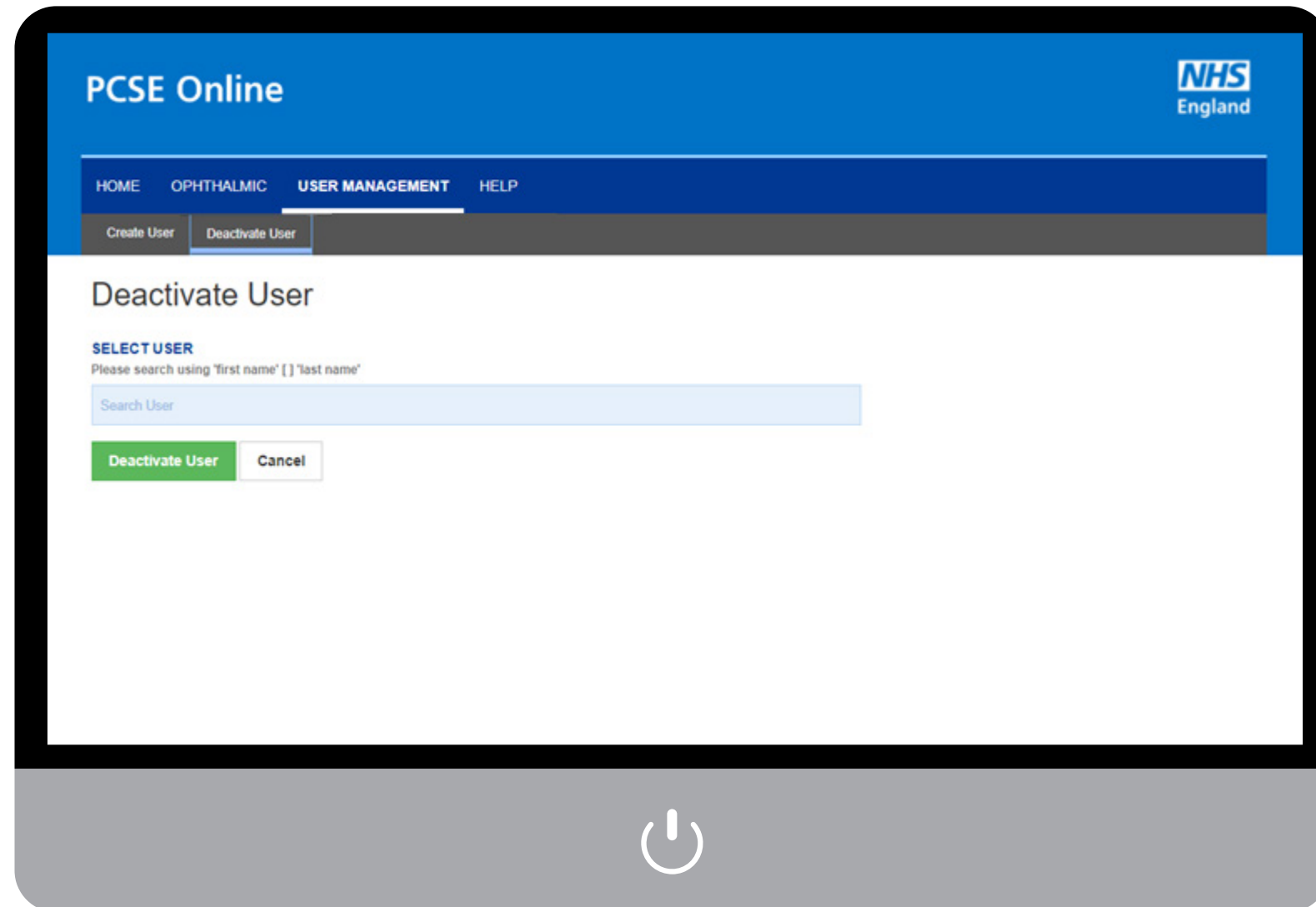
- **Select Deactivate User in the grey bar to be taken to this screen.**
- **Begin to type the user's name and the blue box will begin to show you users**
- **Linked to your organisation.**
- **Choose the user you wish to deactivate.**
- **Click the Deactivate User button.**

Click on the magnifying glass icons to see more information.

How to deactivate a user

0m 47s

Click to play the video





PCSE Online Role Descriptions

There are a number of different permissions that can be allocated to users within PCSE Online. A user can also be given multiple permissions.

These permissions, or roles, will allow users to complete specific actions within the system.

Click on the organisation icon that you work in to see which roles may apply to you:

Please note: If you wish to print this guide, you will see additional pages with the different permissions for each service line at the end of the guide.

Practices

General Practice



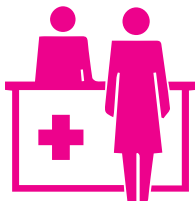
Dental



Ophthalmic



Pharmacy



Support Organisations

Commissioner



NHS England



General Practice Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Supplies and Logistics	Performers List Services	GP Pensions and Payments	
Main Contact User Admin role for Supplies and Medical Records	PL Organisation User Administrator User Admin role for Performers List	GPP – Practice User Management User Admin role for GP Payments and Pensions	PCN permissions
Practice Order Entry Clerk Needed to order supplies for the Practice	PL Practice Manager Needed to approve performer changes	View Claims Needed to view Claims submitted by the practice	Practice Estimates & salary change Needed to submit annual estimates and GP salary changes
Practice Records Movement Admin Needed to manage medical records movements for the Practice		Claims Admin Needed to complete Claims	AVCs Needed to view contributions and statements
		Statements Needed to view Practice Statements and adjustments	Joiners and Leavers Needed to stop and start pensions contributions taken from the practice
		Special Leavers Needed to submit applications and view statements	Locum Applications Needed to approve Locum A submissions

User role name	What can I do with this role?	Who assigns this role?

Dental Practice Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Supplies and Logistics	Performers List Services
Main Contact User Admin role for Supplies and Medical Records	PL Organisation Administrator User Admin role for Performers List
Practice Order Entry Clerk Needed to order supplies for the Practice	PL Practice Manager Needed to approve performer changes

User role name	What can I do with this role?	Who assigns this role?

Pharmacy Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Supplies and Logistics	Market Entry
Main Contact User Admin role for Supplies and Medical Records	Market Entry Applicant User Admin User Admin role for Market Entry applications
Practice Order Entry Clerk Needed to order supplies for the Practice	Market Entry Applicant Permission to given to applicants and allows them to view their own ME application

User role name	What can I do with this role?	Who assigns this role?

Ophthalmic Practice Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Supplies and Logistics	Performers List Services	Ophthalmic Payments	
Main Contact User Admin role for Supplies and Medical Records	PL Organisation Administrator User Admin role for Performers List	User Management (Organisation) User admin role for practice GOS payments	
Practice Order Entry Clerk Needed to order supplies for the Practice	PL Practice Manager Needed to approve performer changes	GOS Claim Manager Needed to view and manage practice claims	OPH Statement View Needed to view practice statements
		GOS Performer Needed to manage their own claims	OPH Head Office Needed to view a practice GOS claims
		GOS Read Only Needed to view claims only	Contract Signatory Needed to manage practice GOS 3/4 claims

User role name	What can I do with this role?	Who assigns this role?

NHS England Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Performer List Services		GP Pensions and Payments	
PL Authority Admin User User Admin role for Performers List	PL Administrator	GPP - REG User Management User Admin role for GP Payments and GP Pensions	
NHS England User	PL National User	GPP - REG Approver Needed to view practice payments actions within PCSE Online	GPP - REG Appraiser Admin Restricted to processing solo forms for Appraisal work (RMS) and approval of locum forms.
PL Approver RICS and Re-inclusions	PL Approver (Non RICS)	GPP - REG Data Entry Needed to view practice payment actions and submit or bulk upload PMS / APMS baseline data	NHSE Central Finance Bulk upload Solo RMS files and approve Practice Adjustments (all practices across all commissioners)
PL Approver RICS not Re-inclusions		GPP - REG R/O Needed to view practice statements	PCN Regional View

User role name	What can I do with this role?	Who assigns this role?

Commissioner Permissions

Below is a list of permissions broken down into specific services lines. **Click** on the Information Icon () to see more information about that role which will appear at the bottom of the screen:

Performer List Services	GP Pensions and Payments		
PL Authority Admin User User Admin role for Performers List	GPP - COM User Management User Admin role for GP Payments and GP Pensions	ICB (PCN) User Approver	PCN - ICB Data Administrator
PL Approver Contract (COM) Needed to accept employee changes and 24 hour retirement	GPP - dCOM Approver View practice payment actions and give final approval to claims	GPP - dCOM R/O View practice statements	PCN - Regional View
	GPP - dCOM Data Entry View practice payment actions and give first approval to claims	GPP - dCOM R/O Process solo and locum forms	PCN - Variation Data Entry
	GPP - Non-delegated COM Read only access but can submit solo forms	CSU Role for outsourced commissioners and is managed by the user administrator at Commissioners level	PCN - Variation Approver

User role name	What can I do with this role?	Who assigns this role?



User role name	Role description	What can I do?	Who assigns this role?
GPP - REG User Management	RLT Administrator role for GP Payments and Pensions, with the ability to set-up users and apply applicable roles to colleagues within their organisation.	• Create RLT user • Deactivate RLT user • Assign and Manage Role Permissions	PCSE will assign a user administrator role
GPP - REG Approver	RLT's are the authorisation body (for GP payments and pensions) for all non-delegated commissioners. They also have overall commissioning responsibility for all Commissioners in hierarchy (both delegated and non-delegated). This role is restricted to View and approvals within their own hierarchy.	• View standard claims *RLTs should advise practices when to start submitting claims using PCSE Online • Final Approval of standard claims • View practice statements • View practice GSUM opt-out statuses • View practice contract types • View practice QOF data • View practice adjustments • Submit adjustments / contract variations • View PMS / APMS baseline data • View committed Solo pension contribution payments	NHS England user Administrator (GPP - RLT User Management) will assign this role
GPP - REG Data Entry	RLT's are the authorisation body (for GP payments and pensions) for all non-delegated Commissioners. They also have overall commissioning responsibility for all Commissioners in hierarchy (both delegated and non-delegated). This role is restricted to View, create, and edit privileges within their own hierarchy. Their approvals are restricted to first line approvals of standard claims only.	• View standard claims *RLTs should advise practices when to start submitting claims using PCSE Online • 1'st line approval of standard claims • View practice statements • View practice GSUM opt-out statuses • View practice contract types • View practice QOF data • View / enter practice adjustments and contract variations • View PMS / APMS baseline data • Submit or bulk upload PMS / APMS baseline data	NHS England user Administrator (GPP - RLT User Management) will assign this role

User role name	Role description	What can I do?	Who assigns this role?
GPP - REG Appraiser Admin	Restricted to processing solo forms for Appraisal work (RMS) and approval of locum forms.	- Submit solo forms for work undertaken for the RLT (individually or via bulk upload) - View submitted Solo forms - Notify PCSE of upcoming SOLO payments related to submitted SOLO forms - View and approve Locum A forms - Bulk upload "Income Stream records for Solo Payments"	NHS England user Administrator (GPP - RLT User Management) will assign this role
NHSE Central Finance	Highest level authorising body for NHS England. Requires same privileges as NHSE_Commissioner but at a national level. Focussed on viewing financial reports and approving adjustments in exceptional scenarios. This role will also view the Pension reports (e.g. monthly pensions pay-over, annual assurance & compliance reports).	- Bulk upload Solo RMS files - Approve Practice Adjustments (all practices across all commissioners)	NHS England user Administrator (GPP - RLT User Management) will assign this role
GPP - REG R/O	RLT's are the authorisation body (for GP payments and pensions) for all non-delegated Commissioners. They also have overall commissioning responsibility for all Commissioners in hierarchy (both delegated and non-delegated). This role is restricted to R/O access to practice statements & pension reports (e.g. monthly pensions pay-over, annual assurance & compliance reports) only.	View practice statements	NHS England user Administrator (GPP - RLT User Management) will assign this role

Commissioner

User role name	Role description	What can I do?	Who assigns this role?
GPP - COM User Management	Commissioner Administrator role, with the ability to set-up users and apply applicable roles to colleagues within their organisation (also to delegated teams like CCU)	- Create user - Deactivate user - Assign and Manage Role Permissions	PCSE will assign a user administrator role
GPP - dCOM Approver	Authorisation body (for GP payments and pensions) for all delegated Commissionerss. This role is restricted to View and approvals within their own hierarchy.	- View standard claims *Commissionerss should advise practices when to start submitting claims using PCSE Online - Final Approval of standard claims - View practice statements - View practice GSUM opt-out statuses - View practice contract types - View practice QOF data - View practice adjustments - Submit adjustments / contract variations - View PMS / APMS baseline data - View committed Solo pension contribution payments	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role
GPP - dCOM Data Entry	Authorisation body (for GP payments and pensions) for all delegated Commissionerss. This role is restricted to View, create, and edit privileges within their own hierarchy. Their approvals are restricted to first line approvals of standard claims only.	- View standard claims *Commissionerss should advise practices when to start submitting claims using PCSE Online 1'st line approval of standard claims - View practice statements - View practice GSUM opt-out statuses - View practice contract types - View practice QOF data - View / enter practice adjustments and contract variations - View PMS / APMS baseline data - Submit or bulk upload PMS / APMS baseline data	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role

Commissioner

User role name	Role description	What can I do?	Who assigns this role?
GPP - dCOM R/O	The authorisation body (for GP payments and pensions) for all delegated Commissioners. This role is restricted to R/O access to practice statements & pension reports (e.g. monthly pensions pay-over, annual assurance & compliance reports) only.	View practice statements	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role
GPP - dCOM Solo & Locum Admin	Restricted to processing solo forms for Clinical and board members and approval of locum forms.	- Submit solo forms for work undertaken for the dCommissioners (individually or via bulk upload) - View submitted Solo forms - Notify PCSE of upcoming SOLO payments related to submitted SOLO forms - Approve Locum A forms, where the Commissioners is the commissioning body - Bulk upload "Income Stream records for Solo Payments"	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role
GPP - Non-delegated COM	Read-only access to certain information. Not an authorising role for the purposes of PCSE Online. Can process SOLO applications.	- Submit solo forms for work undertaken for the non-delegated Commissioners (individually or via bulk upload) - View submitted Solo forms - Notify PCSE of upcoming SOLO payments related to submitted SOLO forms - View and approve Locum A forms - View Practice statements - Bulk upload "Income Stream records for SOLO Payments"	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role

Commissioner

User role name	Role description	What can I do?	Who assigns this role?
CSU	This role caters for scenarios where the Commissioner outsources the administration of Solo and locum work. The CSU is not a separate organisation and will login as a Commissioner user with access managed by the Commissioners' user management. Access restricted to administration of solo forms (Commissioning Support Unit support Commissioners in administrative tasks). System access will be administered by Commissioners.	• Submit solo forms for work undertaken at the Commissioners (individually or via bulk upload) • View submitted Solo forms • Notify PCSE of upcoming SOLO payments related to submitted SOLO forms • View and approve Locum A forms • Bulk upload "Income Stream records for SOLO Payments"	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role
GPP - dCOM R/O	The authorisation body (for GP payments and pensions) for all delegated Commissionerss. This role is restricted to R/O access to practice statements & pension reports (e.g. monthly pensions pay-over, annual assurance & compliance reports) only.	• View practice statements	Commissioners user Administrator (GPP - Commissioners User Management) Will assign this role

Out Of Hours Provider

User role name	Role description	What can I do?	Who assigns this role?
GPP - OOHP User Management (Organisation)	Out of Hours Provider Administrator role, with the ability to set-up users and apply applicable roles to colleagues within their organisation.	- Create user - Deactivate user - Assign and Manage Role Permissions	PCSE will assign a user administrator role
Solo Provider	This role is for an organisation specifically employing a GP SOLO for additional work outside of main GMS & A/PMS contracts. Mainly relates to pension contributions.	- Submit solo forms for work undertaken at the OOHP (individually or via bulk upload) - View submitted Solo forms - Notify PCSE of upcoming SOLO payments related to submitted SOLO forms - Bulk upload "Income Stream records for Solo Payments"	User administrator (GPP - OOHP User Management) will assign this role



Locum Chambers

User role name	Role description	What can I do?	Who assigns this role?
GPP - Chambers User Management (Organisation)	Locum Chambers Administrator role, with the ability to set-up users and apply applicable roles to colleagues within their organisation.	- Create user - Deactivate user - Assign and Manage Role Permissions	PCSE will assign a user administrator role
Locum Upload	Locum Chambers who can bulk upload A forms ONLY on behalf of their locum GPs. The system then auto generates the B forms and requests payment from GP.	Bulk upload locum A forms on behalf of GPs	User administrator (GPP - Chambers User Management) will assign this role

GP Practice

User role name	Role description	What can I do?	Who assigns this role?
GPP - Practice User Management	GP Practice User Administrator role for GP Payments and Pensions, with the ability to create users and apply applicable roles to colleagues within their organisation. This role will provide access to both internal practice users (e.g. GP's, practice managers etc.) and external users (i.e. Accountants) to enable necessary processing.	• Create user • Change the roles of PCSE Online users within your organisation • Deactivate users	GP Practice User Administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.
GPP - GP Principal	GP principal needs access to process applications on behalf of their self only (e.g. T1, estimates, AVC, SOLO, LOCUM, opt-in/out, special leave etc.) If they take on additional responsibility as a practice owner, then additional roles will need to be assigned (e.g. practice / finance management)	• Complete and submit an Annual certificate • Submit an Annual certificate completed by practice Accountant • View your previous Annual certificates • Complete your individual estimated income • Submit & view your locum A&B applications • Approve Solo applications raised by Solo providers for work you have executed • View your AVC applications • Complete payment details relating to Locum, Solo and AVC contributions • Opt-out or into the pension scheme (including viewing submitted applications) • Submit and view your break in service applications • View employee contribution statements • Complete an opt-out on behalf of a Performer/NCP • View annual certificates / Self assessments for other GPs at the practice	GPs listed as a Principal GP on the Performers List are automatically assigned this role, if they have a registered assignment



GP Practice

User role name	Role description	What can I do?	Who assigns this role?
GPP - GP Salaried	Salaried GP needs access to process applications on behalf of their self only (e.g. T2, estimates, AVC, SOLO, LOCUM, opting/out, special leave etc.) All GPs with access to PCSE online can view their employee contribution statements regardless of association to a practice.	• Complete and submit a Self-Assessment application • Submit a Self-Assessment completed by practice Accountant • View your previous Self-Assessments • Complete your individual estimated income • Submit & view your locum A&B applications • Approve Solo applications raised by Solo providers for work you have executed • View your AVC applications • Complete payment details relating to Locum, Solo and AVC contributions • Opt-out or into the pension scheme (including viewing submitted applications) • Submit and view your break in service applications • View employee contribution statements • Complete an opt-out on behalf of a Performer/NCP	GP Practice User Administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.
GPP - Non-GP Partner	Non-GP partner needs the same access as a GP Principal, only they are not a medical performer. Access to process applications on behalf of their self only (e.g. T1, estimates, AVC, SOLO, LOCUM, opt-in/out, special leave etc.) If they take on additional responsibility as a practice owner, then additional roles will need to be assigned (e.g. practice / finance management)	• Complete and submit an Annual certificate • Submit an Annual certificate completed by practice Accountant • View your previous Annual certificates • Complete your individual estimated income • View your AVC applications • Complete payment details relating to AVC lump sum contributions • Opt-out or into the pension scheme (including viewing submitted applications) • Submit and view your break in service applications • View employee contribution statements • Complete an opt-out on behalf of a Performer/NCP	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role



GP Practice

User role name	Role description	What can I do?	Who assigns this role?
GPP - View Claims	This role would generally be given to a practice user and allows the user to view standard claims (Locum / premises) submitted at that GP practice only.	- View standard claims submitted at that practice (including status e.g. approved, rejected etc.) - View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Claims Admin	This role would generally be given to a practice user and allows the user to submit & recall standard claims (Locum / premises) at that GP practice only.	- Complete, submit and view standard claims at that practice - View employee contribution statements Your Commissioners will advise you when to start submitting claims through PCSE Online	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Statements	This role would generally be given to a practice user and allows the user to view practice statements, QOF payments, adjustments made, GSUM opt-in status only and will be notified of late drugs payment.	- View practice statements (current and old) - View GSUM opt-in Status for practice - View QOF data for practice - View pension adjustments - View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Practice Estimates & salary change	This role would generally be given to a practice user and allows the user to complete and submit practice estimates and GP salary changes at that practice only.	- Accept / reject individual estimates entered by GPs / partners at the practice - Submit practice estimates - View submitted practice estimates - Submitting / viewing GP or Partner salary changes - View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Locum Applications	This role would generally be given to a practice user and allows the user to approve/reject Locum A applications only, at that practice.	- Approve / reject Locum A applications received - View previous locum applications received - View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role

GP Practice

User role name	Role description	What can I do?	Who assigns this role?
GPP - AVCs	This role would generally be given to a practice user and allows the user to view AVC applications for GPs at that practice.	• View AVC applications for GPs / Non-clinical partners working at that practice • View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Joiners & Leavers	This role would generally be given to a practice user and allows them to start a joiners contributions at their new practice. And stop contributions for practice leavers.	• Process practice joiners to start their contributions • Process practice leavers to stop their contributions • View employee contribution statements	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role
GPP - Special Leaves	This role would generally be given to a practice user and allows the user to manage special leave applications (i.e. Parental & Break in Service) for GP's / NCP at that practice.	• Submit parental leave applications • View submitted parental leave applications for that practice • Submit break in service applications • View submitted parental leave applications for that practice • View employee contribution statements • CP	Practice GPPP User Administrator (GPP - Practice User Management) will assign this role

NHS England and Commissioners

User role name	Role description	What can I do?	Who assigns this role?
PL Authority Admin User	The Performers List administrator role is effectively a Main Contact Role and can create other users within the system. The role should be given to limited people due to the permissions give with the role.	- Create new users and give them the appropriate permissions (listed in this document) - Add permission to users - Add/ remove an organisation from a user	A User Administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.
NHS England Local Office User	This is a general role that is not given in isolation and is only used with the following roles: - PL Approver RICS and Re-inclusions - PL Approver RICS not Re-inclusions - PL Approver (non RICS) - PL Administrator This role should be given to anyone expected to carry out approvals within PCSE Online for applications or transactions the Performers submit.		
PL Approver RICS and Re-inclusions	See NHS England Local Office User section	- Approve Inclusion on to the Performer list - Re-include based on previous status - RICS - impose or vary conditions - RICS discretionary removal - RICS Mandatory removal - RICS Suspend Performer - Print out all uploaded documents - Print out all application data entered	NHS England user Administrator (PL Authority Admin User) will assign this role
PL Approver RICS not Re-inclusions	See NHS England Local Office User section	- Approve Inclusion on to the Performer list - RICS impose or vary conditions - RICS discretionary removal - RICS Mandatory removal - RICS Suspend Performer - Print out all uploaded documents - Print out all application data entered	NHS England user Administrator (PL Authority Admin User) will assign this role

NHS England and Commissioners

User role name	Role description	What can I do?	Who assigns this role?
PL Approver (Non RICS)	See NHS England Local Office User section	• Approve Inclusion on to the Performer list • Print out all uploaded documents • Print out all application data entered • Access to reporting at Local Office level • Accept Change of Employment	NHS England user Administrator (PL Authority Admin User) will assign this role
PL Administrator	See NHS England Local Office User section	• Print out all uploaded documents • Print out all application data entered	NHS England user Administrator (PL Authority Admin User) will assign this role

User role name	Role description	What can I do?	Who assigns this role?
PL Approver Contract (Commissioners)	This role will be assigned to the NHS Clinical Commissioning Group	• Accept 24-hour retirement • Accept change of practice of Principal (acknowledge contract change) • Accept change of salaried to principal • Accept withdrawal (resignation/ retirement)	NHS England user Administrator (PL Authority Admin User) will assign this role
PL National User	This role will allow read only access to PCSE Online and will allow the user to view applications and transactions but will not allow any amendments to be made.	• View applications in Local Office Queue	NHS England user Administrator (PL Authority Admin User) will assign this role



Applicant and Practice

Page 1 of 1

User role name	Role description	What can I do?	Who assigns this role?
PL Applicant	This role is a customer role and used in isolation will only permit the customer to view and edit their own PCSE Online profile	- Register to access PCSE Online - Complete a Performers List application for Inclusion - View & amend their own details	This role is given to applicants who register to use PCSE Online to submit an application
PL Performer	This role is a customer role and used in isolation will only permit the customer to view and edit their own PCSE Online profile	- Complete any Performers List process - View & amend their own details	Once an application is approved the Performer will be allocated the PL performer role in PCSE online.
PL Organisation User administration	This role is given to a member of the practice who is responsible for creating PCSE Online users in the practice and assigning appropriate permissions.	- Create PCSE Online User (Practice Only) - Assign permissions	PL Organisation User administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.
PL Practice Manager	Give to any person in the Practice who is permitted to accept a change of employment. This role is assigned by the Practice Main Contact.	Accept Change of Employment	PL Organisation User administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.

Ophthalmic practice

User role name	Role description	What can I do?	Who assigns this role?
GOS Claim Manager	As with all PCE Online roles, an individual user makes require more than one role to complete their tasks. Users can have multiple roles, and these will not conflict.	- Cancel All Claims - Manage Organisation GOS claims - Manage Organisation CET claims - Sign own CET claims - Return Organisation Claims - View Statements for organisation - Choose Statement Preference - Organisation Statement Preference - Patient Level Data Statement View	The person with the User Management (Organisation) permission assigns this role.
GOS Performer		- Manage Organisation GOS claims - Manage my CET Claims - Sign own CET claims - Return Organisation Claims	The person with the User Management (Organisation) permission assigns this role.
GOS Read Only		- View GOS Organisation Claims - View CET Organisation Claims	The person with the User Management (Organisation) permission assigns this role.
Contract Signatory		- Cancel All Claims - Manage Organisation GOS3/4 Claims - Sign Organisation claims - Return Claims - View or Manage Levy Options - View Statements for organisation - Choose Statement Preference - Organisation Statement Preference - Patient Level Data Statement View	The person with the User Management (Organisation) permission assigns this role.
OPH Statement View		- View Statements for organisation - Patient Level Data Statement View	The person with the User Management (Organisation) permission assigns this role.



Ophthalmic practice

User role name	Role description	What can I do?	Who assigns this role?
OPH Head Office	As with all PCE Online roles, an individual user makes require more than one role to complete their tasks. Users can have multiple roles, and these will not conflict.	• View Statements for organisation • Patient Level Data Statement View • Return Claims • Choose Statement Preference • Organisation Statement Preference • View all GOS claims • View Head Office Statements • View Ophthalmic Report	The person with the User Management (Organisation) permission assigns this role.

RLT

User role name	Role description	What can I do?	Who assigns this role?
OPHREGPaymentsUser	As with all PCE Online roles, an individual user makes require more than one role to complete their tasks. Users can have multiple roles, and these will not conflict.	- Return Organisation Claims - View Statements for organisation - Patient Level Data Statement View - View Organisation GOS Claims - View or Manage Adjustments - Approve all Levies	***
REGStatementView		- View Statements for organisation - Patient Level Data Statement View - View 12 Months Statement	***



LOCSU

User role name	Role description	What can I do?	Who assigns this role?
OPH LOC Levies Clerk	As with all PCE Online roles, an individual user makes require more than one role to complete their tasks. Users can have multiple roles, and these will not conflict.	View or Manage Levies	PCSE will assign this role
OPH LOC Statement View		- View 12 Months Statement - View Statements for organisation	PCSE will assign this role

User Management Roles

User role name	Role description	What can I do?	Who assigns this role?
OPH User Administrator	These ophthalmic user roles have no access to Ophthalmic payment options. If these options are needed, they would need to be assigned alongside one of the roles mentioned in the previous ophthalmic sections	- Assign and Manage Role Permissions - Create user - Delete user	PCSE will assign this role. You can contact the user registration team for further support if needed.
R&S User Administrator		- Assign R&S User Role - Create user - Delete user	PCSE will assign this role. You can contact the user registration team for further support if needed.
OPH Authority User Management		- Create user - Delete user - Manage Passwords	PCSE will assign this role. You can contact the user registration team for further support if needed.
User Management (Organisation)		- Create user - Delete user	PCSE will assign this role. You can contact the user registration team for further support if needed.

Market Entry

User role name	Role description	What can I do?	Who assigns this role?
Market Entry Applicant	The applicant can create, view, amend, withdraw, and provide additional/missing information in support of an ME application status dependent)	• Register to access PCSE Online • Complete a Market Entry application • View & amend their own details	The Market Entry Applicant User Admin will assign this role to additional users.
Market Entry Applicant User Admin	The Market Entry Applicant User Admin role is effectively an external Main Contact Role and can create other users within the system. The role should be given to limited people due to the permissions give with the role.	• Create new users and give them the appropriate permissions (listed in this document) • Add permission to users • Add/ remove an organisation from a user	PCSE will assign this role. You can contact the user registration team for further support if needed.



Supplies & Logistics

User role name	Role description	What can I do?	Who assigns this role?
Main Contact	This is a User Administrator role for Supplies and Medical Records management.	- Assign and Manage Role Permissions - Create user - Delete user	A User Administrator assigns this role If you do not have a user who already has this role, contact PCSE who will do this for you.
Practice Order Entry Clerk	This role enables the user to order supplies through PCSE Online	- Submit supply orders - Track Orders	The main contact will assign this role
Practice Records Movement Admin	This role enables the user manage their practice's medical records (Incoming/ Outgoing)	- Submit supply orders - Track Orders	The main contact will assign this role



Primary Care Support England



Very satisfied



Satisfied



Dissatisfied



Very dissatisfied

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For further support and information, please use the links below:



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