Setting up a New User Checklist

The guide is a checklist to setting up a new user in Vision. It is meant as a training aid and as such is not exhaustive. Please refer to the relevant links for full reference to associated topics.

Setting up a New User

Before setting up a new user, you need to obtain the following information:

- Personal information is required, such as Surname, Forename, Sex, Title and Short name (this is unique to the user and displays in the journal).

- Role details eg nurse prescriber, registrar and for clinical staff:

  – Prescribing numbers

  – Registration details

  – Local GP codes

The table below details what codes are required and provides some examples.

Role	England	Northern Ireland	Scotland	Wales	Notes
Partner	• **GMP code** - 8 characters made up of the 6-character PPA number eg 345654, prefixed with a G and an unique check digit at the end eg GMP number is G3456549 • **GMC number** – Unique for each GP 7 numeric characters • **HB Code** - local GP code provided by your HB	• **Prescribing number** - 6 digit prescribing number • **GMC number** – Unique for each GP 7 numeric characters • **HB Code** - local GP code provided by your HB	• **Prescribing number** – Prescribing number is 6 digits and is prefixed with the HB cipher eg G (Glasgow), N (Grampian). An example prescribing number is N12345 • **GMC number** – Unique for each GP 7 numeric characters • **HB Code** – Prescribing number without the check digit at the end eg N1234	• **GMP code** - 8 characters made up of the 6-character PPA number eg 345654, prefixed with a G and an unique check digit at the end eg GMP number is G3456549 • **GMC number** – Unique for each GP 7 numeric characters • **HB Code** - local GP code provided by your HB	This information is setup in Management Tools – Control Panel – File Maintenance - Staff Adding GPs

Salaried GP	• As above but without the HB Code	• As above but without the HB Code	• As above but without the HB Code	• As above but without the HB Code	Adding GPs
Registrar	• The registrar is linked to the Responsible Partner which automatically picks up their GMP code • **GMC number** – Unique for each Registrar - 7 numeric characters	• The registrar is linked to the Responsible Partner which automatically picks up their GMP code • **GMC number** – Unique for each Registrar - 7 numeric characters	• **Prescribing number** - Each practice in Scotland has a generic prescribing number that is used for their registrars. You can either add this to the new registrar or create a generic salaried GP with this prescribing number and assign the Registrar to this generic salaried GP • **GMC number** – Unique for each Registrar - 7 numeric characters	• The registrar is linked to the Responsible Partner, which automatically picks up their GMP code • **GMC number** – Unique for each Registrar - 7 numeric characters	For Med3's to be printed electronically, GMC numbers must be recorded for all registrars

Nurse Prescribers	• **Prescribing number** – 8 character alphanumeric with the format NNANNNNA where N is a number and A is a letter eg 12A3456B (upper or lower case is allowed) • **NMC pin number** – Registration number	• **Prescribing number** – 4 digit prescribing number • **NMC pin numbe**r – Registration number	• **Prescribing number** – 5 characters. The first character is the HB cipher, the second 2 are the unique identifier for the nurse and the last two identify the practice • **NMC pin number** – Registration number	• **Prescribing number** – 8 character alphanumeric with the format NNANNNNA where N is a number and A is a letter eg 12A3456B (upper or lower case is allowed) • **HSW Registration number** - Registration number	This information is setup in Management Tools – Control Panel – File Maintenance – Staff Nurse Prescribers Tick the supplementary prescriber box for Nurse Prescribers
Pharmacists	• **Prescribing number** – This is the pharmacists RPSGB code • **Registration Number**	• **Prescribing number** – This is the pharmacists RPSGB code • **Registration Number**	• **Prescribing number** – This is the pharmacists RPSGB code • **Registration Number**	• **Prescribing number** – This is the pharmacists RPSGB code • **HSW Registration number**	Adding Pharmacists Tick the supplementary prescriber box for Pharmacists

Steps to Creating a New User in Vision

	Module/Function	Brief Description	Completed Yes/No
Step 1	Login as a System Administrator	At least one person in your practice should have administrator rights, if not, the default login is SYS.	
Step 2	Control Panel - File Maintenance - Add Staff	You need to create a staff profile for the new user. Adding Staff If your clinician is using Vision Anywhere their email address must be setup within their staff details. Vision Anywhere Email Addresses	
Step 3	Control Panel - Security	Security is where you setup a login and a temporary password. Adding a User in Security	
Step 4	Control Panel - File Maintenance - Staff Groups	If the practice use staff groups in Mail Manager or if tasks are sent to groups in Daybook, you need to make sure the new user is added to the appropriate group. Adding Users to Groups	
Step 5	Control Panel - Mail Maintenance - Staff Access	You need to check Mail Maintenance to make sure the new user has the correct staff access to Mailboxes eg do they just need to view their own mail, or should they have access to other mailboxes. Mail Maintenance - Staff Access	
Step 6	Apps controller - System Utilities - User Profile Manager	This enables you to setup user profiles which incorporate much of the Consultation Manager user settings. User Profile Manager	
Step 7	Consultation Manager - Options - Setup	This is used to check that you are using the correct view. All the other setup is done in Apps controller. Patient Records View	

Step 8	Vision front screen - Options - Mail Manager at Start-up Mail Manager - Filter Mail Manager - Tools - Options	Mail Manager can be switched on so that it is launched at start up. Mail Manager Setup The number of messages shown in Mail Manager is determined by a date filter and needs to be customised for the new user. You can also quickly move onto the next message by selecting an option in Mail Manager. Mail Manager Quick Reference Guide	
Step 9	Appointments - Maintenance - Book Owners Appointments - Personal Plan Appointments - Views	If you are going to book appointments for the new user, you need to create a book owner. Appointment Book Owners A personal plan. Appointments Personal Plan Change the Reception of Book view to include the new owner. Appointments - Saving Views	
Step 10	Daybook - Tools - Options Daybook - Tasks - Maintain Frequent Task Lists	If using Daybook, you can personalise Daybook settings for dealing with tasks. Daybook	
Step 11	Vision+ - Configuration and Settings	Each user has Vision+ settings which need to be adapted for the new user. Vision+ Settings	
Step 12	Control Panel - File Maintenance - Online	If the new user is a clinician you need to ensure that they are setup online. Online Services Configuration	

Note - Steps 1 - 3 should be done first. The remaining steps can be completed in any order and should comply with your practice protocol.

Note - This list does not include how to setup items such as users on the network, ICE, SCI Gateway or Role based access for Smartcards etc.