
What do we do when a GP leaves?

This quick reference guide explains the actions you need to take in Vision when a GP leaves your surgery.

- **Control Panel** - Reassigning Trainees, Locums and Registrars to a different GP, see [Reassign Trainees, Locums and Registrars](#) (page 1).
- **Registration** - Reallocate patients, see [Reallocating Patients](#) (page 2).
- **Appointments** - Remove Book Owners in Appointments, see [Appointments - Removing Book Owner](#) (page 6).
- **Mail Manager** - Set up a forward for any incoming mail, see [Forwarding Incoming Mail](#) (page 8).
- **Daybook** - Complete or reassign any outstanding tasks, see [Completing or Reassigning Outstanding Tasks](#) (page 9).
- **Control Panel** - Finally, inactivate their log in, see [Inactive user](#) (page 10).



Reassign Trainees, Locums and Registrars

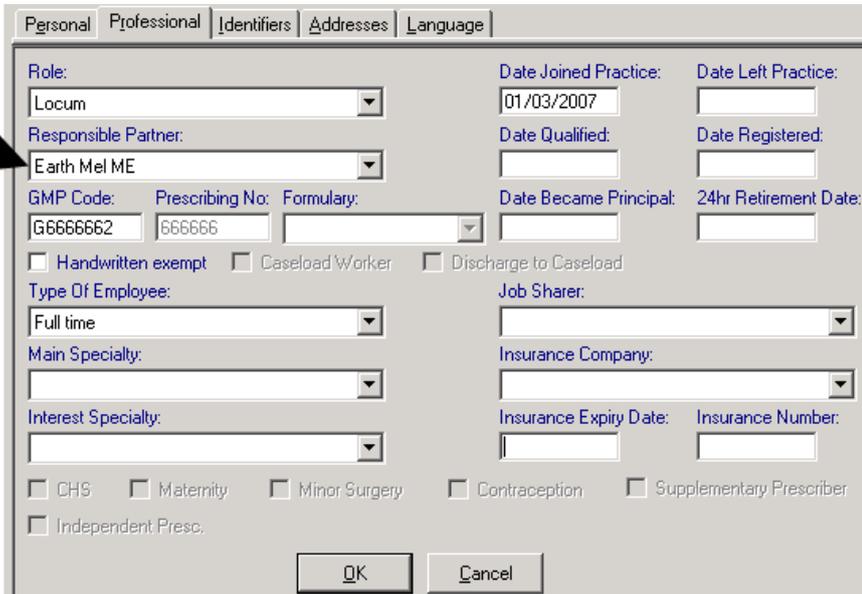
When a GP leaves your practice, each trainee, locum and registrar that they are responsible for need to be assigned to another clinician.

To select a new **Responsible Partner**:



1. From **Management Tools**, select **Control Panel Maintenance**.
2. Right click on the staff member to be reassigned and select **Edit Staff**.
3. Select their **Professional** tab and select a new **Responsible Partner** from the available list.

Select a new Responsible Partner from here →



The screenshot shows the 'Edit Staff' dialog box with the 'Professional' tab selected. The 'Responsible Partner' dropdown menu is highlighted with a handwritten note and an arrow pointing to it. The dropdown currently shows 'Earth Mel ME'. Other fields in the dialog include 'Role' (Locum), 'Date Joined Practice' (01/03/2007), 'GMP Code' (G6666662), and 'Prescribing No' (666666). There are also checkboxes for 'Handwritten exempt', 'Caseload Worker', 'Discharge to Caseload', 'CHS', 'Maternity', 'Minor Surgery', 'Contraception', 'Supplementary Prescriber', and 'Independent Presc.'. The 'Type Of Employee' is set to 'Full time' and 'Job Sharer' is set to 'No'. 'Main Specialty' and 'Interest Specialty' are empty. 'Insurance Company', 'Insurance Expiry Date', and 'Insurance Number' are also empty. 'Date Qualified' and 'Date Registered' are empty. 'Date Became Principal' and '24hr Retirement Date' are empty. 'Date Left Practice' is empty. 'OK' and 'Cancel' buttons are at the bottom.

4. Select **OK** to save.

Reallocating Patients

Any patients allocated to a GP that is leaving needs to be transferred to another GP. A GP can be set as a Usual GP and/or a Registered GP, both need to be addressed:

 **Note** - If you are planning on splitting your patients over several GP's ensure you have created the appropriate groups before starting this process.

To reallocate your patients see:

- [Reallocating a Usual GP](#) (page 3)
 - [Reallocating a Registered GP](#) (page 4)
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 **Important** - Neither of these processes update the patients **Acceptance date**.

 **Training Tip** - It is a good idea to run a search and save as a group, patients registered to the leaving GP and patients that have the leaving GP as their usual GP both before the transfer and after it. This enables you to double check the reallocation process. See [Search and Reports - Search Criteria Help topics for further details](#)
http://help.visionhealth.co.uk/DLM580/Search_and_Reports/index.htm#35900.

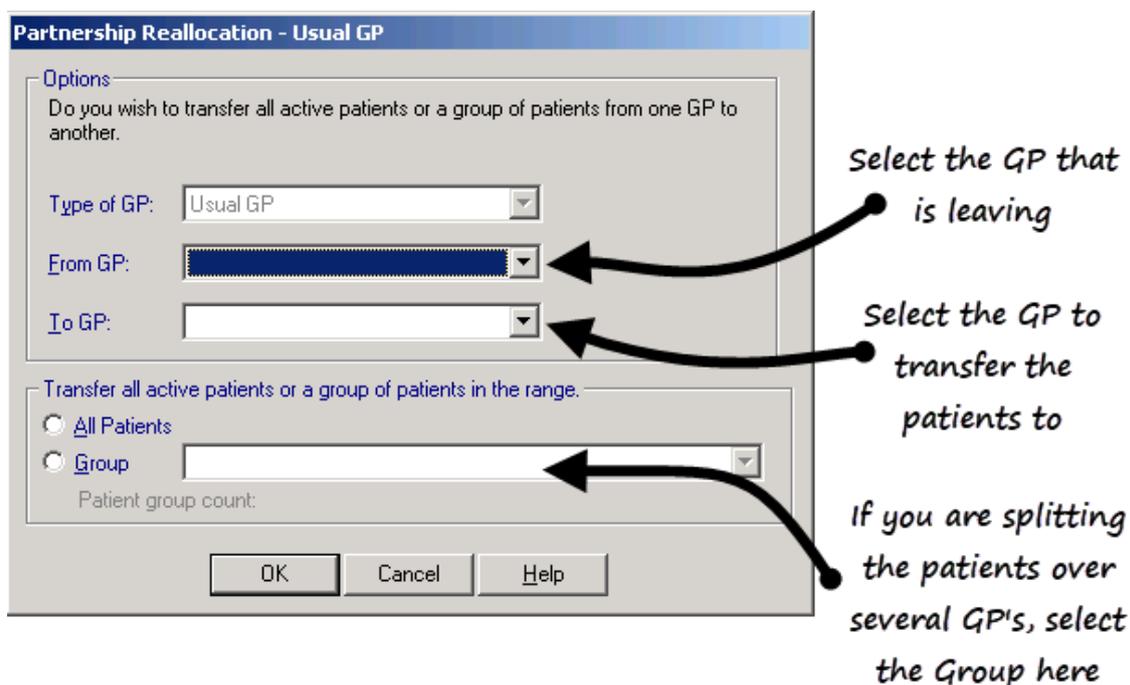
Reallocating a Usual GP

Reallocating the Usual GP is important for prescriptions, so you must do this as well as reallocating the registered GP. To reallocate a Usual GP:



1. From **Registration**, select **Transfer - Partnership Reallocation - Usual GP**.

2. The **Partnership Reallocation - Usual GP** is displayed:



The screenshot shows the 'Partnership Reallocation - Usual GP' dialog box. It has a title bar and an 'Options' section. The 'Options' section contains the following fields and controls:

- Type of GP:** A dropdown menu with 'Usual GP' selected.
- From GP:** A dropdown menu with a blue highlight on the selected item.
- To GP:** A dropdown menu.
- Transfer all active patients or a group of patients in the range:** Two radio buttons: 'All Patients' (selected) and 'Group'. Below the 'Group' radio button is a text input field for 'Patient group count'.

Handwritten annotations with arrows point to the 'From GP' and 'To GP' dropdowns, and the 'Group' radio button. The annotations read:

- 'Select the GP that is leaving' (pointing to 'From GP')
- 'Select the GP to transfer the patients to' (pointing to 'To GP')
- 'If you are splitting the patients over several GP's, select the Group here' (pointing to the 'Group' radio button)

3. Complete as follows:

- **Type of GP** - Defaults to Usual GP and cannot be changed.
- **From GP** - Select the GP the patients are moving from.
- **To GP** - Select the GP the patients are moving to.
- **Transfer all active patients or a group of patients in the range** - Select either:
 - **All Patients**
 - **Group** - If you are splitting the patients over several GP's, select the group required here.

4. Select **OK** to start the reallocation, a progress bar is displayed.

Reallocating a Registered GP

Important - We recommend that if you are splitting your patients over several GP's you do this by creating groups and applying the reallocation to those groups, this enables you to identify the patients easily after the reallocation if required.

To reallocate a Registered GP:



1. From **Registration**, select **Transfer - Partnership Reallocation - Reg GP**.

2. The **Partnership Reallocation** is displayed:

The screenshot shows the 'Partnership Reallocation' dialog box. It contains the following fields and options:

- TP:** A dropdown menu with 'Leeds' selected.
- From GP:** A dropdown menu with 'Earth, Dr Mel 666666' selected.
- To GP:** A list of destination GPs with columns for GP Code and Surname. The list includes: Jupiter, Dr Sarah (555555), Mars, Dr Jane (777777), Neptune, Dr Michae (999999), and Venus, Dr Fiona (444444). There are navigation buttons (>, <, <<) between the lists.
- From Surname:** A text field with 'A' entered.
- To Surname:** A text field with 'F' entered.
- Transfer all active patients or a group of patients in the range:** Radio buttons for 'All Patients' (selected) and 'Group'.
- Type of GP to transfer:** A dropdown menu with 'Only Registered GP's will be transferred' selected.
- Surname split confirmed by TP:** A checked checkbox.

Annotations with arrows point to various parts of the dialog:

- 'Select the TP' points to the TP dropdown.
- 'Select the GP you are transferring from' points to the From GP dropdown.
- 'Select the GP you are transferring to' points to the To GP list.
- 'and select a surname range where appropriate' points to the From and To Surname fields.
- 'Select Add to select the recipient GP' points to the > button.
- 'If you have TP agreement to split existing patients for allocation to a new GP, tick here' points to the checked checkbox.
- 'If you are splitting the patients over several GP's by group, select the Group here' points to the Group radio button.

3. Complete as follows:

- **TP** - Select the correct trading partner.
- **Surname split confirmed by TP** - If you have TP agreement to split existing patients for allocation to a new GP, tick here
- **From GP** - Select the GP the patients are moving from.
- **To GP** - Select the GP the patients are moving to, complete the **From Surname** and **To Surname** if relevant and then select **Add >**.
- **Transfer all active patients or a group of patients in the range** - Select either:
 - **All Patients**
 - **Group** - If you are splitting the patients over several GP's by group, select the group required here.

4. Select **OK** to start the reallocation, a progress bar is displayed.

Appointments - Inactivating Book Owner

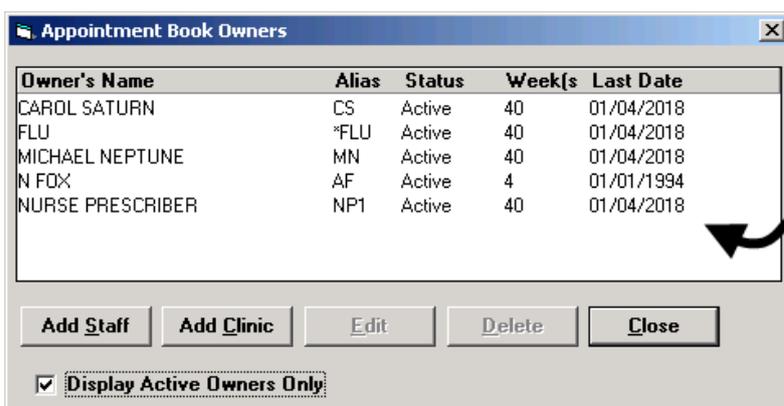
Any appointment books for the clinician leaving should be inactivated:

Note - Books can only be deleted if unused books have a last date (appointment) of more than seven days ago.

Vision 3 Appointments



1. From **Appointments**, select **Maintenance - Book Owners**.
2. The **Appointment Book Owners** screen is displayed.
3. Simply double click on the owner you want to inactivate.



Double click clinician or clinic to inactivate

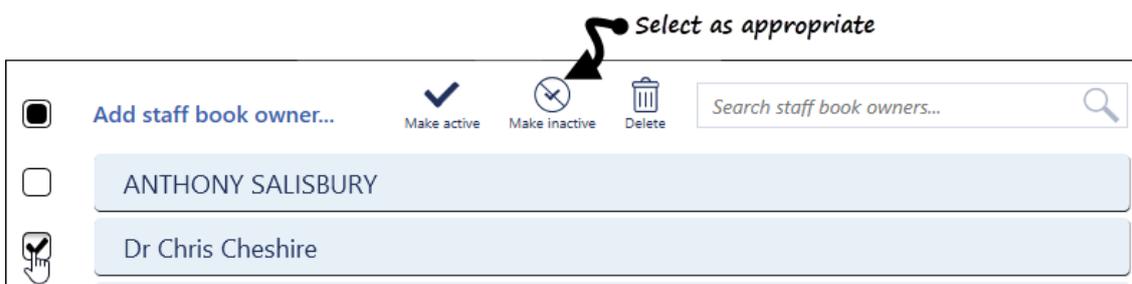
The book owner now has a status of **Out of Use**. To view inactive Book Owners, remove the tick in **Display Active Owners Only**. Should the clinician return, simply double clicking an inactive owner re-activates them.

Appointment Back Office App

To make a book owner inactive:



1. From the **Appointments Back Office** app, select **Staff** from the Appointments Back Office Navigation bar.
2. The book owners are displayed.
3. Tick the box to the left of the staff name and a menu is displayed at the top of your screen.



Select as appropriate

4. Select **Make Inactive** to update the status accordingly.

5. Select **Save** at the bottom right of the screen to save changes, or **Reset** to cancel any changes.

Online Services -

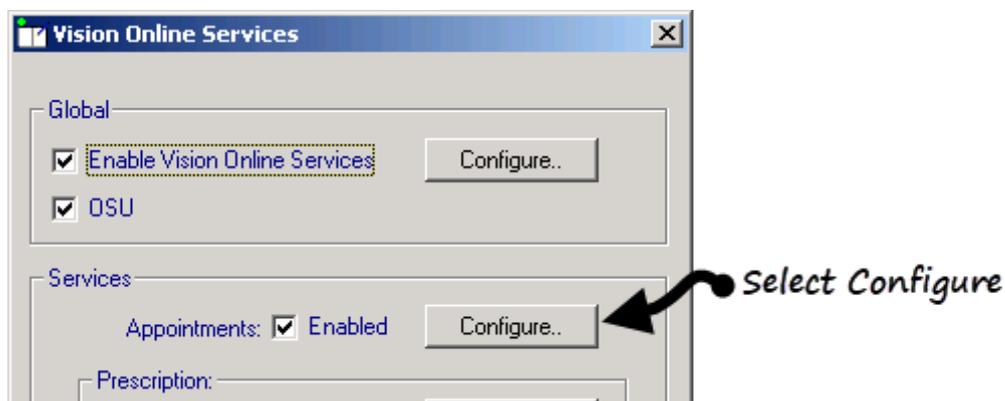
Leaving clinician must be removed from the list of staff available via your online services, **VOS** and **Patient Services** in England, Scotland and Northern Ireland, and **My Health Online** in Wales.

To remove a clinician from your online services:

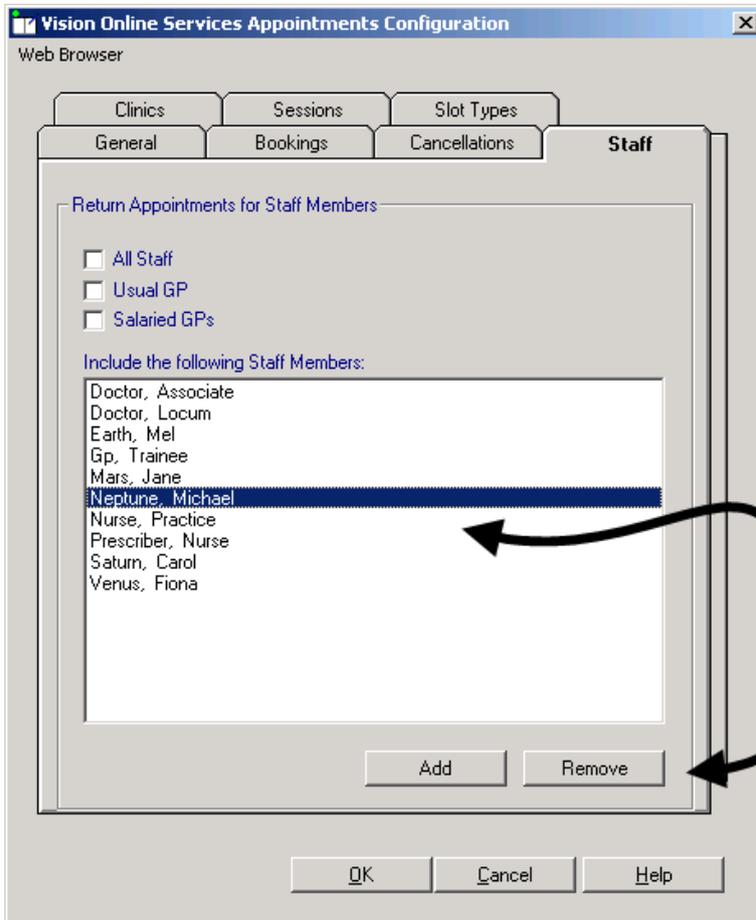
1. From the Vision front screen, select **Management Tools - Control Panel**



2. The **Vision Online Services** screen is displayed.
3. In **Services - Appointments**, select **Configure**.



4. The **Vision Online Services Appointments Configuration** screen is displayed, select the **Staff** tab.
5. A list of available staff is displayed, highlight the clinician to remove.
6. Select **Remove**.



Highlight the clinician to remove

Select Remove

7. Finally select **OK** to save and close.

Forwarding Incoming Mail

In Mail Manager you can set a mailbox to redirect any mail received to ensure no incoming mail is delivered to the mailbox of a staff member who has left:

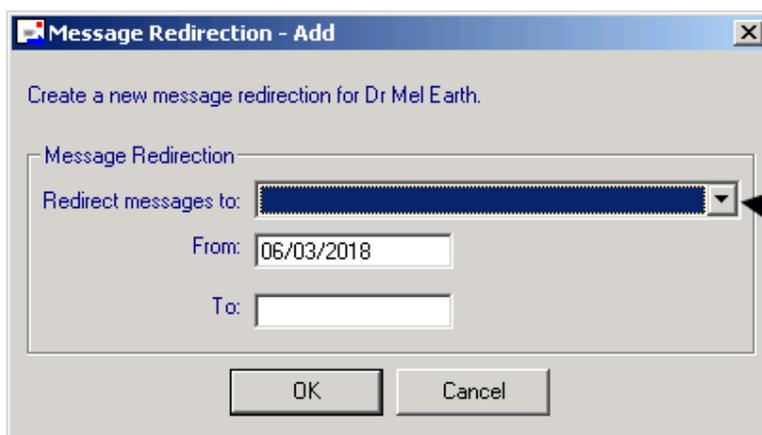
1. From the Vision front screen, select **Management Tools - Control Panel**



- Mail Maintenance - Msg Redirection



2. Double click the GP leaving and the **Message Redirection - Add** screen is displayed.



Select who should receive future mail for this GP

3. Complete as follows:

- **Redirect messages to** - select who to forward incoming mail to.
- **From** - Defaults to today's date, update if required.
- **To** - Leave blank.

4. Select **OK**.

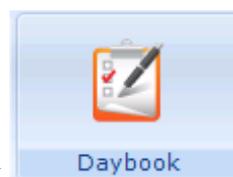
Note – The redirect applies to all mail types, including copied messages.

Once the redirect is set up, when mail is allocated in Mail Manager, if you select a mailbox that has an active redirect, you are prompted: 'A message redirection exists for (Mailbox Name). This message will be re-allocated to (Redirection Recipient Name). Do you wish to continue?'. Select **Yes** to continue.

Redirected messages are marked **Redirected** in the audit trail in **Mail Manager** and displays next to the redirected GP in **Control Panel - Mail Maintenance - Msg Redirection**.

Completing or Reassigning Outstanding Tasks

In Daybook, any outstanding tasks allocated to the leaving GP must be either completed or forwarded to another recipient.



1. From the Vision front screen, select **Daybook**.
2. Select the **All Outstanding Tasks** tab and then select the **Assigned To** column.
3. All outstanding tasks are now displayed in assigned to order.
4. If there are any outstanding tasks assigned to the leaving clinician, highlight the task and then select either:

- **Complete**  - If no further action is required.

- **Edit**  - To select another recipient.

5. Repeat step 4 until all tasks assigned to the leaving GP have been completed or reassigned.

Inactivate user

When a GP leaves and you no longer want them to have access to Vision:



1. From **Management Tools**, select **Control Panel Maintenance**.

2. Right click on the staff member to be inactivated and select **Edit Staff**.

3. Select the **Professional** tab.

Date Left Practice:

4. Enter a date in **Date Left Practice**.

5. Now, select the **Personal** tab.

6. Enter a **Valid Until** date, tick **Inactive** Inactive.

7. A warning that 'All clinicians assigned to this responsible GP should be inactivated' is displayed, see [Reassign Trainees, Locums and Registrars](#) (page 1), select **OK**.

8. The **Users** screen is displayed, warning you that active users associated with the staff member you are inactivating are automatically inactivated.



9. Select **OK**.

The member of staff can no longer log into Vision.