

## Vision 3 Housekeeping Checklist - Scotland

This printable checklist details the tasks you should regularly perform within your clinical system if you are in Scotland.

It is designed to be printed and completed as a record of housekeeping activity.

This checklist should be used alongside the on-line help, see [Vision 3 Housekeeping Checklist - Scotland](#) in the **Vision 3 Front Screen Help Centre**



**Remember** - Your system is updated on a regular basis. It is your responsibility to ensure you are using the latest version of this checklist.

**Date of check:**

### Vision 3 Checklist

Registration	Frequency	Completed?
Run an <b>Incomplete Registration Links</b> report.	Weekly	
If used, monitor the <b>Sensitive Patient</b> report.	Ad hoc	

Registration Links	Frequency	Completed?
Process <b>Incoming Transactions</b> , for example, amendments.	Daily	
Resolve any errors in the <b>Error file</b> then delete.	Daily	
Get a list of deductions to export via Docman.	Daily	
Monitor <b>Unacknowledged Acceptances</b> (frozen patients). For <b>Unacknowledged Acceptances</b> that are more than one week old, you should contact the relevant Trading Partner or PSD.	Daily / Weekly	
Run the <b>Records required by TP</b> and <b>Records Sent by TP</b> reports.	Ad hoc	
Perform a <b>Quarterly Archive</b> .	Quarterly	

Mail Manager	Frequency	Completed?
Assign unmatched incoming messages to patients.	Daily	
Allocate unallocated incoming messages to a mailbox.	Daily	
Ensure all incoming messages have a status of filed.	Daily	
Deal with all incoming messages, for example, filed, read, actioned, and completed.	Daily	
Complete messages that have been actioned.	Daily	
Make sure the previous day's mail is read.	Daily	
File <b>GP2GP</b> messages and check that a reminder is attached to the patient record in <b>Consultation Manager</b> .	Daily	
Ensure <b>Withdrawn GP2GP</b> messages are actioned and filed.	Daily	
Check and reprocess any outgoing transmission errors.	Daily	
Review incoming Treatment Summary Reports.	Ad hoc	

Mail Gateway	Frequency	Completed?
Ensure <b>Mail Gateway</b> is open and running.	Daily	
Check the status of the <b>Clinical Scheduler</b> and make sure no errors are displayed. Select <b>Run Now</b> if required.	Daily	

GP Communicator	Frequency	Completed?
Check the <b>Attention</b> folder for errors.	Daily	

Vision Anywhere	Frequency	Completed?
All users of <b>Vision Anywhere</b> should check there are no Encounters that are left open when logging out.	Daily	

Appointments	Frequency	Completed?
Extend the Appointment Books.	Weekly	
Make sure the clip board/note is empty and move any past appointments to the bin.	Ad hoc	
Ensure you inactivate any book owners, not in use.	Ad hoc	
Ensure at least one workstation has the appointment backup enabled.	Ad hoc	

Tasks	Frequency	Completed?
Check for outstanding tasks.	Daily	
<b>Tasks</b> only - Check for and allocate cross-organisational tasks in <b>UNASSIGNED</b> .	Daily	

Clinical Audit	Frequency	Completed?
Download any “topical” audits from the Knowledge Base/Help.	Ad hoc	
Check your audit figures and manage your reminders.	Ad hoc	
Remove any unused audits.	Ad hoc	

Reporting	Frequency	Completed?
Delete old searches (check the date last run).	Ad hoc	
Delete old groups.	Ad hoc	
Remove obsolete groups.	Ad hoc	
Download any relevant Excel reports.	Ad hoc	
Search for patients registered with an inactive Usual or Registered GP and amend.	Ad hoc	
<b>GP2GP</b> - Search for blank priorities and run <b>Priority Update</b> .	Ad hoc	

Vision+	Frequency	Completed?
Check <b>Download Web Files</b> contain the latest templates/reports.	Ad hoc	
Remove any unused templates/reports.	Ad hoc	
Check that SMS Appointment reminders are still relevant and work with the correct saved searches.	Ad hoc	

Management Tools	Frequency	Completed?
Check the staff file does not include staff who no longer work at the practice.	Ad hoc	
Ensure all staff groups are up to date.	Ad hoc	
Check Patient Online configuration is still relevant.	Ad hoc	
Check <b>Actions</b> within <b>Mail Maintenance</b> are still relevant.	Ad hoc	

Knowledge Base	Frequency	Completed?
Review the latest release guides and blogs on the <b>Knowledge Base</b> .	Ad hoc	

The Learning Zone	Frequency	Completed?
Review the eLearning courses and see if any modules are outstanding or new.	Ad hoc	

Docman	Frequency	Completed?
Make sure the Patient/Read synch runs regularly.	Ad hoc	
Move/delete completed workflows.	Ad hoc	
Review Maintain users and ensure the file is up to date.	Ad hoc	

## System Checklist

	Frequency	Completed?
Change passwords.	Monthly	
Local server only - Check your backup log to check last night's backup was successful.	Daily	
Local server only - Run a weekly backup.	Weekly	
Local server only - Run a cleaning tape through your backup device (DAT drive).	Weekly	
Local server only - Check and when required, update your virus software.	Weekly	
Local server only - Run a monthly backup.	Monthly	
Local server only - Replace worn backup tapes.	Ad hoc	