

What do we do when a GP leaves?

This quick reference guide explains the actions you need to take in **Vision 3** when a GP leaves your surgery:

- **Control Panel** - Reassigning trainees, locums and registrars to a different GP, see [Reassign Trainees, Locums and Registrars](#) on page 1 for details.
- **Registration** - Reallocate patients, see [Reallocating Patients](#) on page 2 for details.
- **Appointments** - Remove book owners in **Appointments**, see [Appointments - Removing Book Owner](#) on page 5 for details.
- **Mail Manager** - Set up a forward for any incoming mail, see [Forwarding Incoming Mail](#) on page 8 for details.
- **Daybook** - Complete or reassign any outstanding tasks, see [Completing or Reassigning Outstanding Tasks](#) on page 9 for details.
- **Control Panel** - Finally, inactivate their log in, see [Inactive user](#) on page 10 for details.

Reassign Trainees, Locums and Registrars

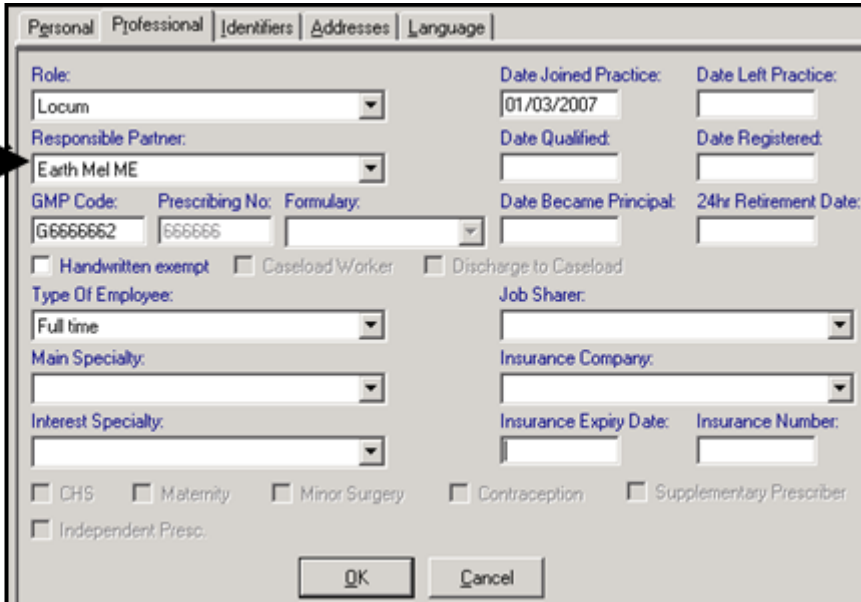
When a GP leaves your practice, each trainee, locum and registrar that they are responsible for need to be assigned to another clinician.

To select a new **Responsible Partner**:



1. From **Management Tools**, select **Control Panel** - **File 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



The screenshot shows the 'Edit Staff' dialog box with the 'Professional' tab selected. The 'Responsible Partner' dropdown menu is highlighted with an arrow from the callout box. The form contains various fields for staff details, including Role, Date Joined Practice, Date Left Practice, Responsible Partner, Date Qualified, Date Registered, GMP Code, Prescribing No, Formulary, Date Became Principal, 24hr Retirement Date, Type Of Employee, Job Sharer, Insurance Company, Insurance Expiry Date, Insurance Number, and checkboxes for CHS, Maternity, Minor Surgery, Contraception, Supplementary Prescriber, and Independent Prescriber.

4. Select **OK** to save.

Reallocating Patients

Any patients allocated to a GP that is leaving need 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](#) on page 3 for details.
 - [Reallocating a Registered GP](#) on page 4 for details.
-



Important - Neither of these processes update the patients **Acceptance date**.



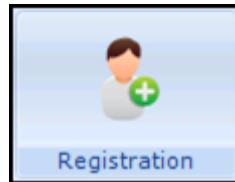
Training Tip - It is a good idea to run a search and save as a group, patients registered to the leaving GP and patients that have the leaving GP as their usual GP both before the transfer and after it. This enables you to double check the reallocation process. See [Search and Reports - Search Criteria Help topics for further details Search and Reports Help Centre](#) (http://help.visionhealth.co.uk/Search_and_Reports/Content/Full%20Help%20Topics_SR/Search%20Criteria/Search%20Criteria.htm).

Reallocating a Usual GP

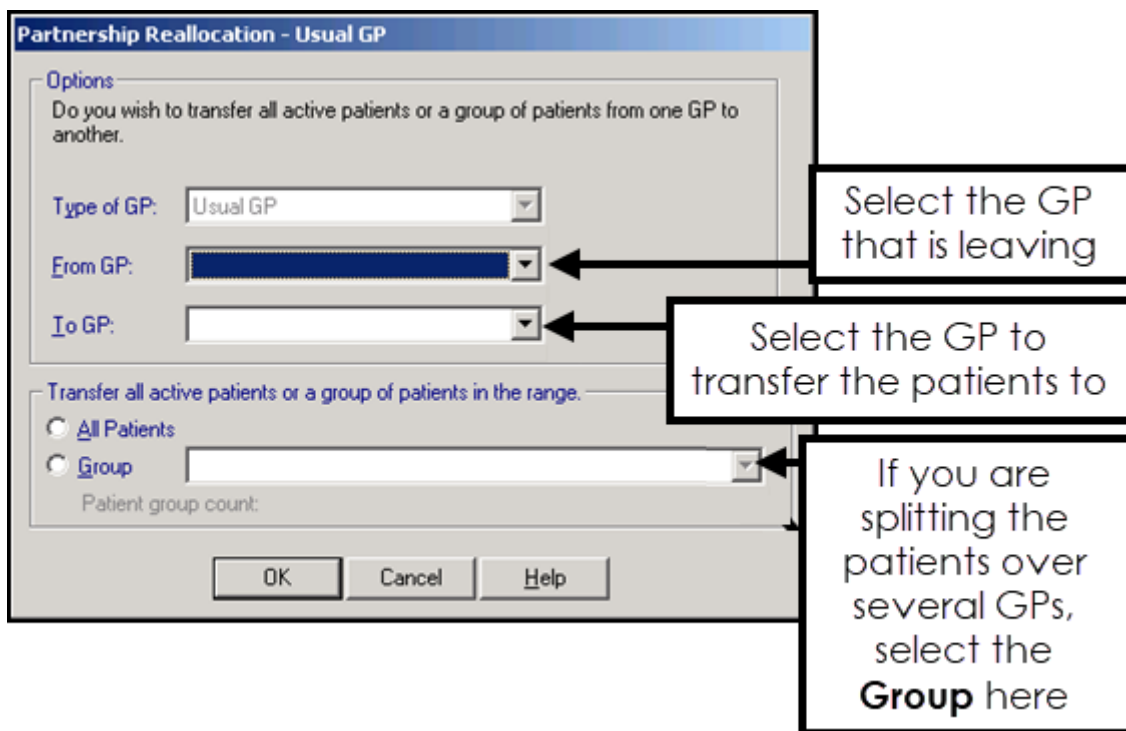
Reallocating the Usual GP is important for prescriptions, so you must do this as well as reallocating the registered GP.

i 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 Usual GP:



1. From **Registration**, select **Transfer - Partnership Reallocation - Usual GP**.
2. The **Partnership Reallocation - Usual GP** screen displays:



The screenshot shows the 'Partnership Reallocation - Usual GP' dialog box. It has a title bar and a main area with the following elements:

- Options:** A section with the text 'Do you wish to transfer all active patients or a group of patients from one GP to another.'
- Type of GP:** A dropdown menu currently set to 'Usual GP'.
- From GP:** A dropdown menu with a blue highlight.
- To GP:** A dropdown menu.
- Transfer all active patients or a group of patients in the range:** A section with two radio buttons: 'All Patients' (selected) and 'Group'.
- Group:** A dropdown menu next to the 'Group' radio button.
- Patient group count:** A text field.
- Buttons:** 'OK', 'Cancel', and 'Help' at the bottom.

Annotations with arrows point to the following fields:

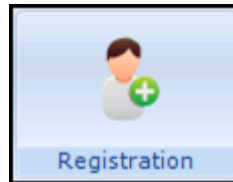
- 'Select the GP that is leaving' points to the 'From GP' dropdown.
- 'Select the GP to transfer the patients to' points to the 'To GP' dropdown.
- 'If you are splitting the patients over several GPs, select the **Group** here' points to the 'Group' radio button and its associated dropdown.

3. Select 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** - To include all patients, or
 - **Group** - If you are splitting the patients over several GP's, select the **Group** here.
4. Select **OK** to start the reallocation, a progress bar displays.

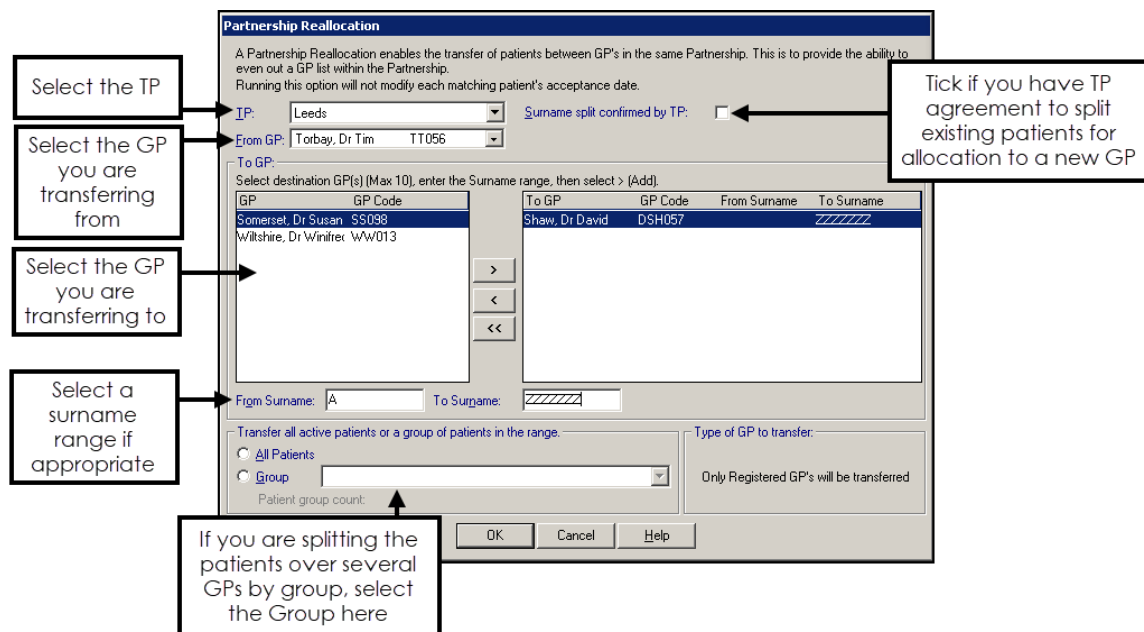
Reallocating a Registered GP

i Important - We recommend that if you are splitting your patients over several GPs 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** screen displays:



Partnership Reallocation

A Partnership Reallocation enables the transfer of patients between GP's in the same Partnership. This is to provide the ability to even out a GP list within the Partnership. Running this option will not modify each matching patient's acceptance date.

TP: Surname split confirmed by TP: ☐

From GP:

To GP:

Select destination GP(s) (Max 10), enter the Surname range, then select > (Add).

GP	GP Code	To GP	GP Code	From Surname	To Surname
Somerset, Dr Susan	SS098	Shaw, Dr David	DSH057		
Wiltshire, Dr Winitre	WW013				

From Surname: To Surname:

Transfer all active patients or a group of patients in the range:

☐ All Patients ☐ Group

Tick if you have TP agreement to split existing patients for allocation to a new GP

If you are splitting the patients over several GPs by group, select the Group here

Only Registered GP's will be transferred

OK Cancel Help

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** - To include all patients, or
 - **Group** - If you are splitting the patients over several GP's by group, select the **Group** here.
4. Select **OK** to start the reallocation, a progress bar displays.

Appointments - Inactivating Book Owner

You must inactivate any appointment books for the clinician leaving:

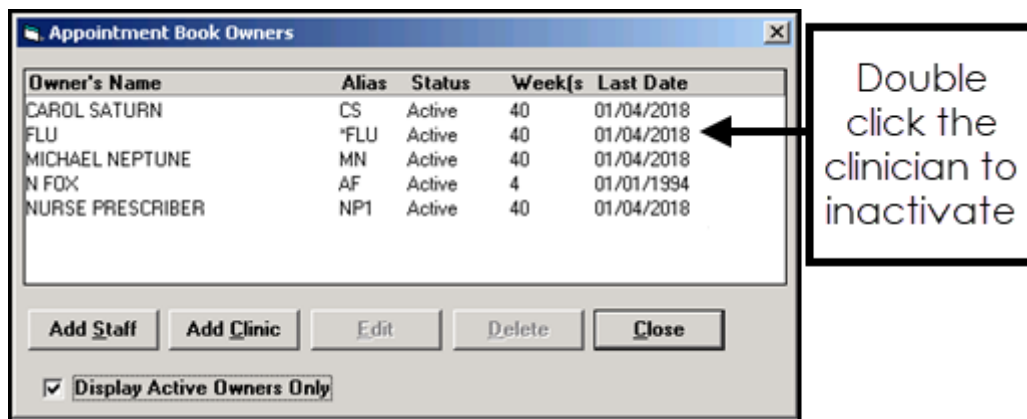


Note - Books can only be deleted if unused books have a last date (appointment) of more than seven days ago.

Vision 3 Appointments



1. From **Appointments**, select **Maintenance - Book Owners**.
2. The **Appointment Book Owners** screen displays. Simply double click on the owner to inactivate:



Owner's Name	Alias	Status	Week[s]	Last Date
CAROL SATURN	CS	Active	40	01/04/2018
FLU	*FLU	Active	40	01/04/2018
MICHAEL NEPTUNE	MN	Active	40	01/04/2018
N FOX	AF	Active	4	01/01/1994
NURSE PRESCRIBER	NP1	Active	40	01/04/2018

Buttons: Add Staff, Add Clinic, Edit, Delete, Close

☒ Display Active Owners Only

Double click the clinician to inactivate

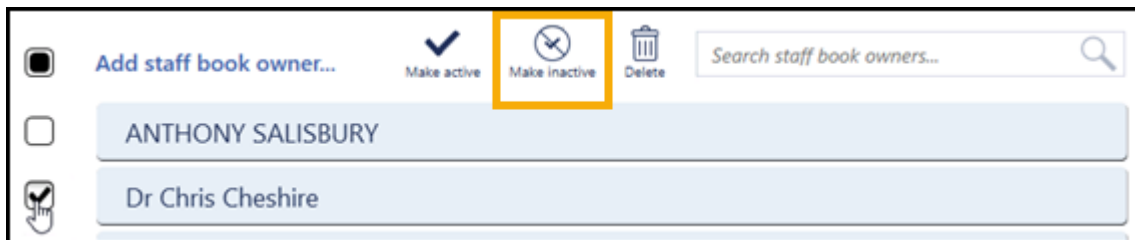
The book owner now has a status of **Out of Use**. To view inactive book owners, remove the tick in **Display Active Owners Only**. Should the clinician return, simply double click an inactive owner to reactivate them.

Appointment Setup

To make a book owner inactive:



1. From **Appointments Setup**, select **Staff** from the Appointments Setup Navigation bar.
2. The book owners display, tick to the left of the staff name and a menu displays at the top of your screen:



3. Select **Make Inactive** to update the status accordingly.
4. Select **Save** at the bottom right of the screen to save changes, or **Reset** to cancel any changes.

Online Services

You must remove the leaving clinician from the list of staff available via your online services, **Patient Services** in England, Scotland and Northern Ireland, and **My Health Online** in Wales.

To remove a clinician from your online services:

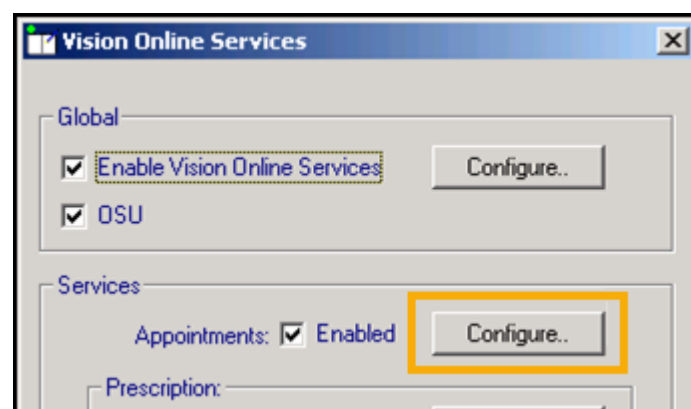
1. From the Vision 3 Front Screen, select **Management Tools - Control**



Panel - **Online**

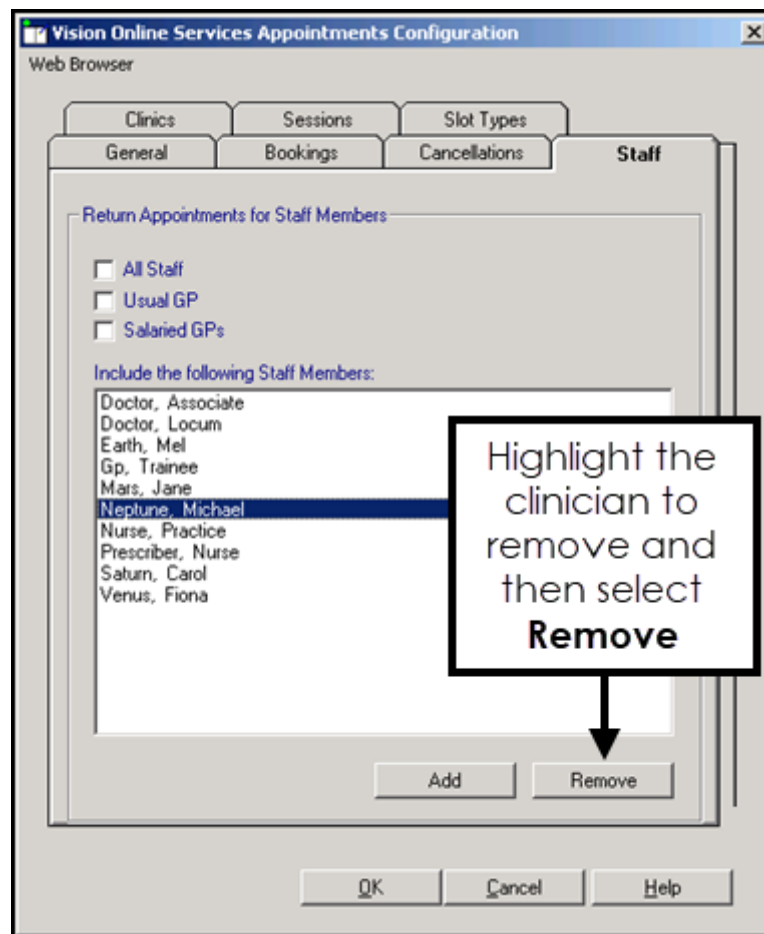


2. The **Vision Online Services** screen displays, in **Services - Appointments**, select **Configure**:



3. The **Vision Online Services Appointments Configuration** screen displays, select the **Staff** tab.

4. A list of available staff displays, highlight the clinician to remove.



5. Select **Remove**.
6. Finally select **OK** to save and close.

Forwarding Incoming Mail

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

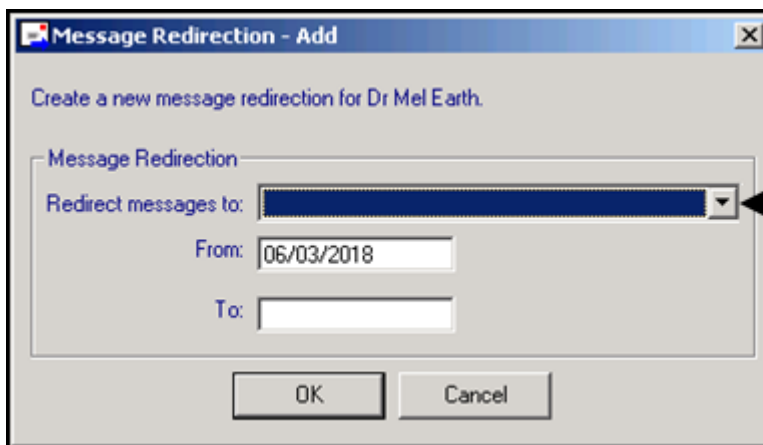
1. From the **Vision 3 Front Screen**, select **Management Tools - Control**



Panel - Mail Maintenance - Msg Redirection



2. Double click the GP leaving and the **Message Redirection - Add** screen displays:



Select who should receive any mail sent to this GP

3. Complete as required.
 - **Redirect messages to** - Select who to forward incoming mail to.
 - **From** - Defaults to todays 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.

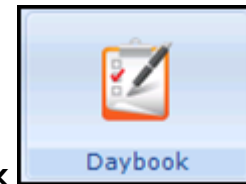
Redirected messages are marked **Redirected** in the audit trail in **Mail**



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 3 Front Screen**, select **Daybook**.
2. Select the **All Outstanding Tasks** tab and then select the **Assigned To** column.
3. All outstanding tasks display 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 3**:



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

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

3. Select the **Professional** tab.



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

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



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

7. A warning that 'All clinicians assigned to this responsible GP should be inactivated' displays, see [Reassign Trainees, Locums and Registrars](#) on page 2 for details, and select **OK**.

8. The **Users** screen displays, 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 3**.