


Registration Links

A Quick Guide to Performing a Quarterly Archive for Practices in Scotland

You are automatically prompted to do an archive on the 3rd day of a new quarter, provided there are no outstanding registration transactions. The archive removes all completed transactions for the quarter about to be closed and provides a capitation figure and a summary of the quarterly registrations. The prompts appear on:

- **3rd January**
- **3rd April**
- **3rd July**
- **3rd October**

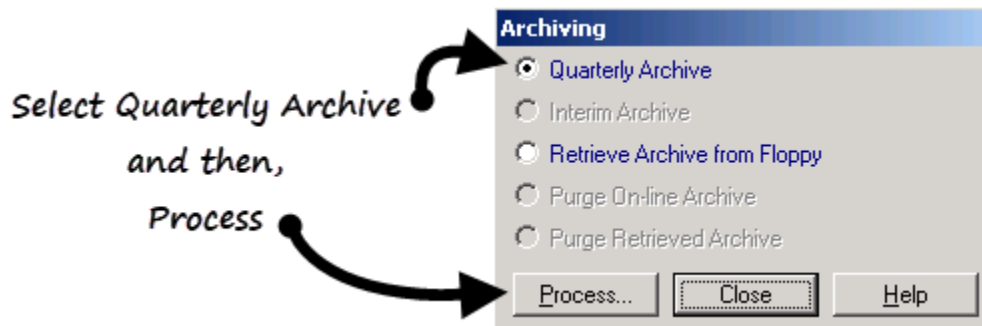
 **Note** - An archive cannot be performed until all transactions within that quarter have been successfully completed. If you see the message "An archive would be due but there are unacknowledged acceptances outstanding", it means you have new patients waiting to be approved. Please contact your TP/HB/PSD.

Below are instructions on how to perform a quarterly archive:

- 1.** From the Vision front screen, select **Messaging** and then **Registration Links**



- 2.** Select **Archive**  and the Archiving screen is displayed:



3. Select **Quarterly Archive** and then click **Process**.

4. When prompted, select a destination folder.



Training Tip - Make sure the printer is on and there is plenty paper in it.

5. The archive process continues automatically from this point and a prompt appears once complete.

6. Two sets of reports are printed detailing capitation figures and quarterly transactions. Depending on your HB area you may need to keep one set and send the other to your HB.