

Creating a Shared Care User

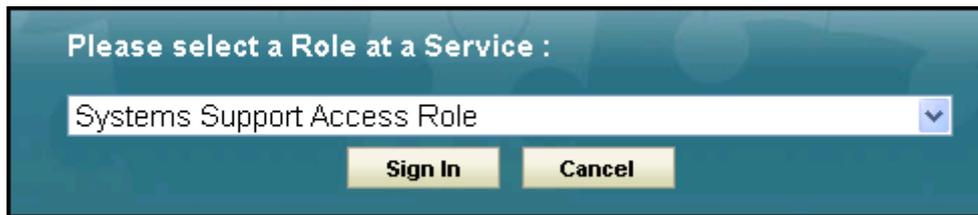
In order to use any **Cegedim Healthcare Solutions** applications in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

To create a user in **Organisational Services** and then add them to a service:

1. Open your browser and access **Vision360** using the URL provided by the **Cegedim Healthcare Solutions** implementation team.
2. Login to **Vision360** by entering your user name and password and select **Sign In**.



3. From **Please select a Role at a Service**, select **Systems Support Access Role**:



4. The **Vision360** home screen displays, select **Organisational Services**



5. The **Service Details** screen displays.
6. Check to see if the user already exists.
 - If the user exists, you can simply add the service required, see [Add a User to a Service](#) on page 4.
 - If the user does not exist, they must be added, see [Create a User in Organisational Services](#) on page 2.

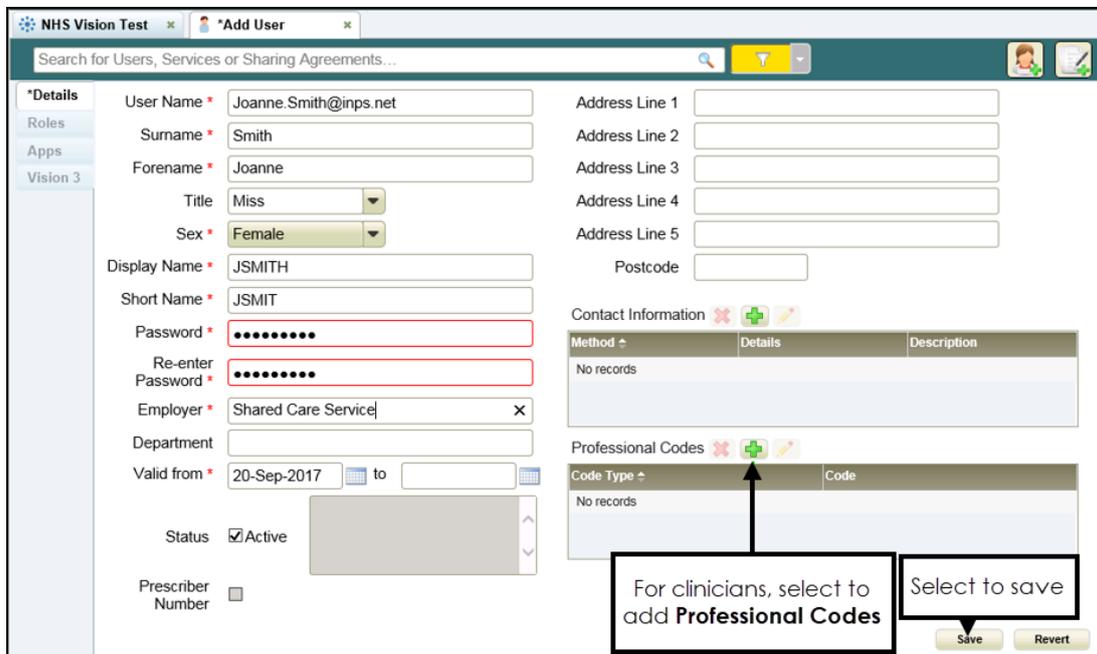
Now complete the following as required:

Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to.



2. Select **Create User** and the new **Add User** tab displays:



The screenshot shows the 'Add User' form with the following fields and sections:

- User Name:** Joanne.Smith@inps.net
- Surname:** Smith
- Forename:** Joanne
- Title:** Miss
- Sex:** Female
- Display Name:** JSMITH
- Short Name:** JSMIT
- Password:** (masked with dots)
- Re-enter Password:** (masked with dots)
- Employer:** Shared Care Service
- Department:** (empty)
- Valid from:** 20-Sep-2017 to (empty)
- Status:** Active
- Prescriber Number:** (empty)
- Address Lines 1-5:** (empty)
- Postcode:** (empty)
- Contact Information:** (No records)
- Professional Codes:** (No records)

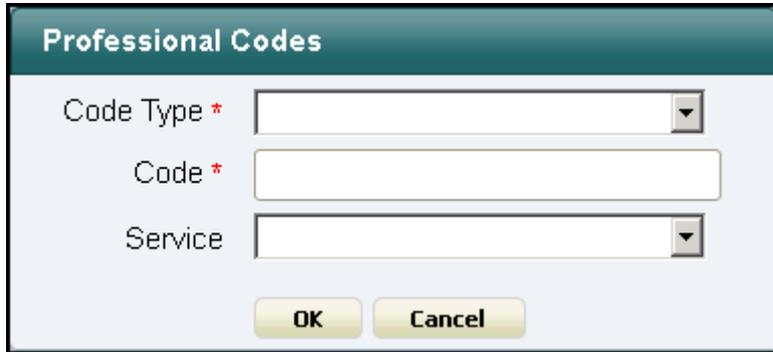
Callout boxes in the screenshot:

- For clinicians, select to add **Professional Codes** (points to the '+' icon in the Professional Codes section)
- Select to save (points to the 'Save' button)

3. Enter the new users details, items marked * are mandatory fields.
 - The password must be a minimum of 6 characters and contain characters from at least three of the following categories:
 - Upper case
 - Lower case
 - Numbers
 - Non-alphanumeric characters: ~!@#\$%^*_+=`|\(){}[]:;'.?/
 - No spaces at the beginning or end of the password
 - The password must not contain three or more consecutive characters (case insensitive) from the user name, forename or surname.
4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:

Adding a Professional Codes

1. From **Professional Codes**, select **Add** .
2. The **Professional Codes** screen displays:



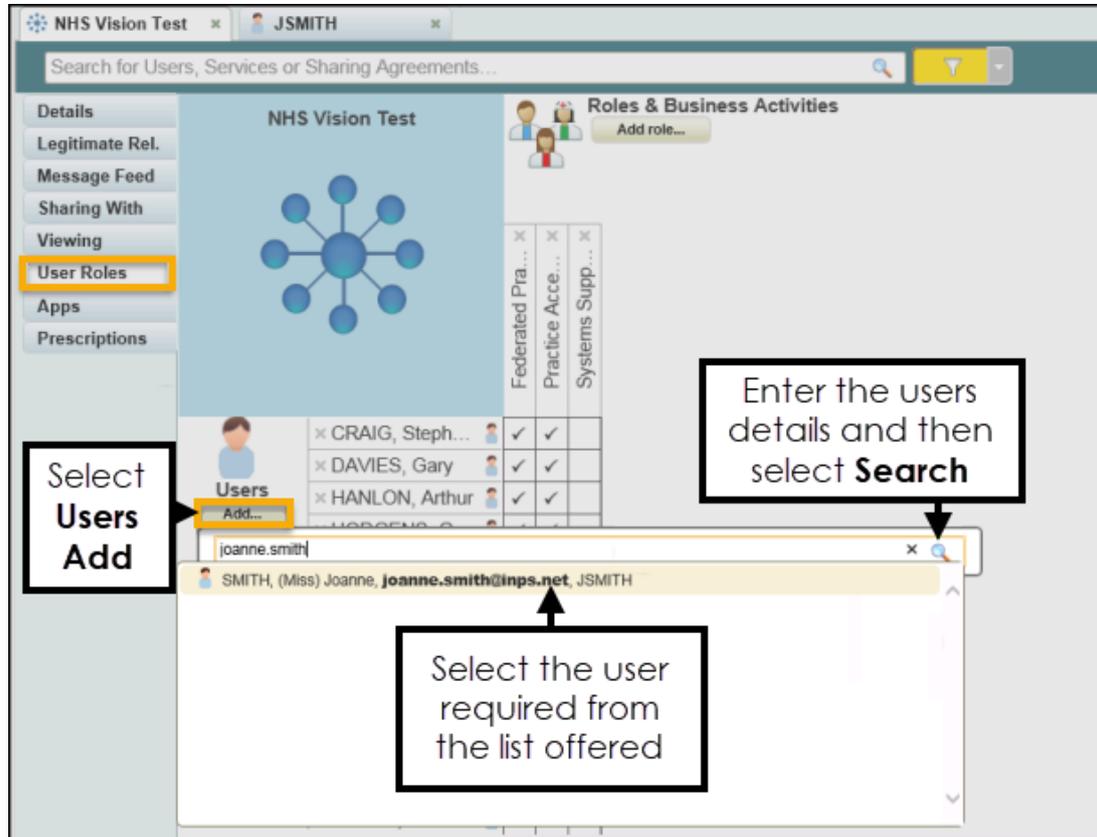
The screenshot shows a dialog box titled "Professional Codes". It contains three input fields: "Code Type" with a dropdown arrow, "Code" with a text input field, and "Service" with a dropdown arrow. At the bottom, there are two buttons: "OK" and "Cancel".

3. Complete as required:
 - **Code Type** - Select the type of code to record
 - **Code** - Enter the code
 - **Service** - Select from the list of services available for this user.
4. Select **OK**.
5. Select **Save** .



Add a User to a Service

1. Open the **Shared Care Service** view, if you have just created the user, this is still open at the top of your screen.
2. Select **User Roles**:



3. Select **Users Add...**
4. Enter user's details in the search bar and select **Search** .
5. Select the user from the results.
6. The user is assigned to the shared care service.
7. Tick next to the user's name under the appropriate heading, to allocate their role.

 **Note** - To remove rights from a user, simply untick the box.
