


Creating a Shared Care User

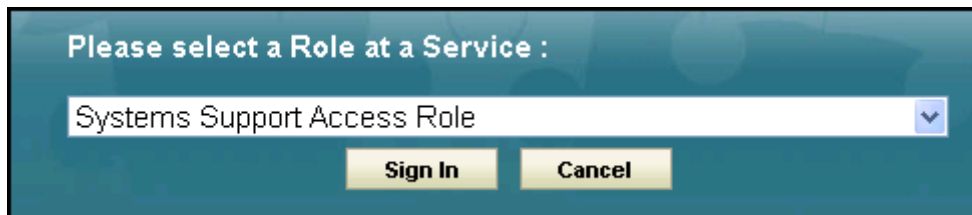
In order to use any **Cegedim Healthcare Solutions** applications in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

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.

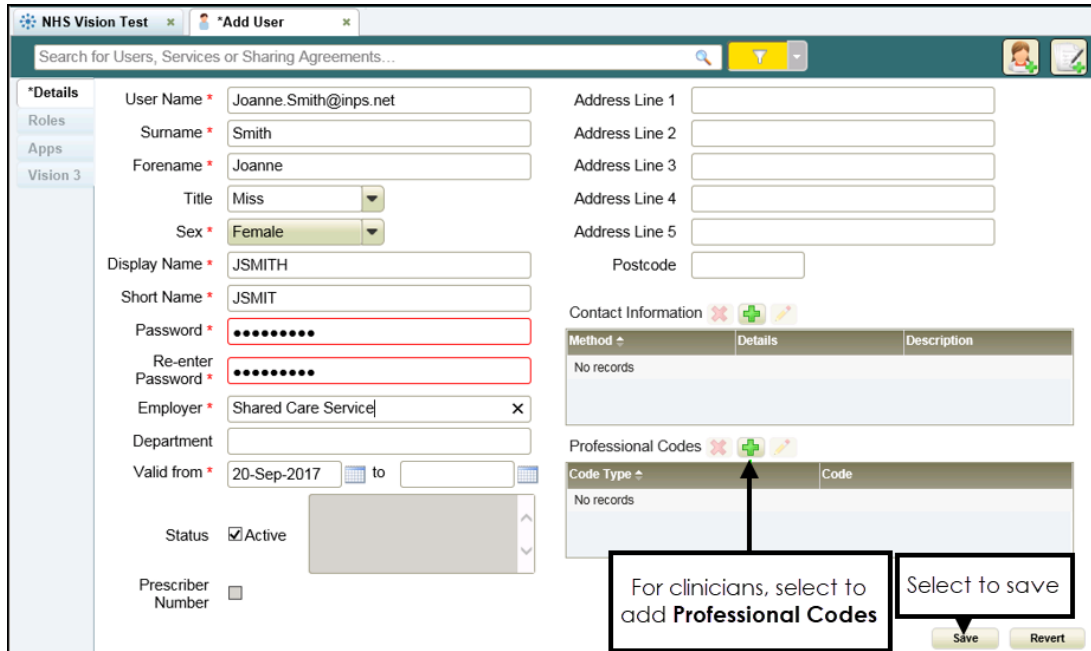
Now complete the following as required:

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:




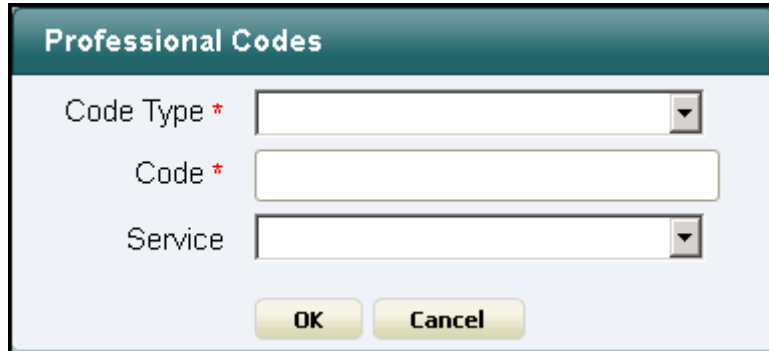
The screenshot shows the 'Add User' form in the NHS Vision Test system. The form is divided into several sections:

- User Details:** Includes fields for User Name (Joanne.Smith@inps.net), Surname (Smith), Forename (Joanne), Title (Miss), Sex (Female), Display Name (JSMITH), Short Name (JSMIT), Password (masked), Re-enter Password (masked), Employer (Shared Care Service), Department, Valid from (20-Sep-2017), Status (Active), and Prescriber Number.
- Contact Information:** Includes fields for Address Line 1 through 5 and Postcode.
- Professional Codes:** A section with a table for adding codes. A callout box points to the '+' icon in this section with the text: "For clinicians, select to add Professional Codes".
- Buttons:** At the bottom right, there are 'Save' and 'Revert' buttons. A callout box points to the 'Save' button with the text: "Select to save".


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:



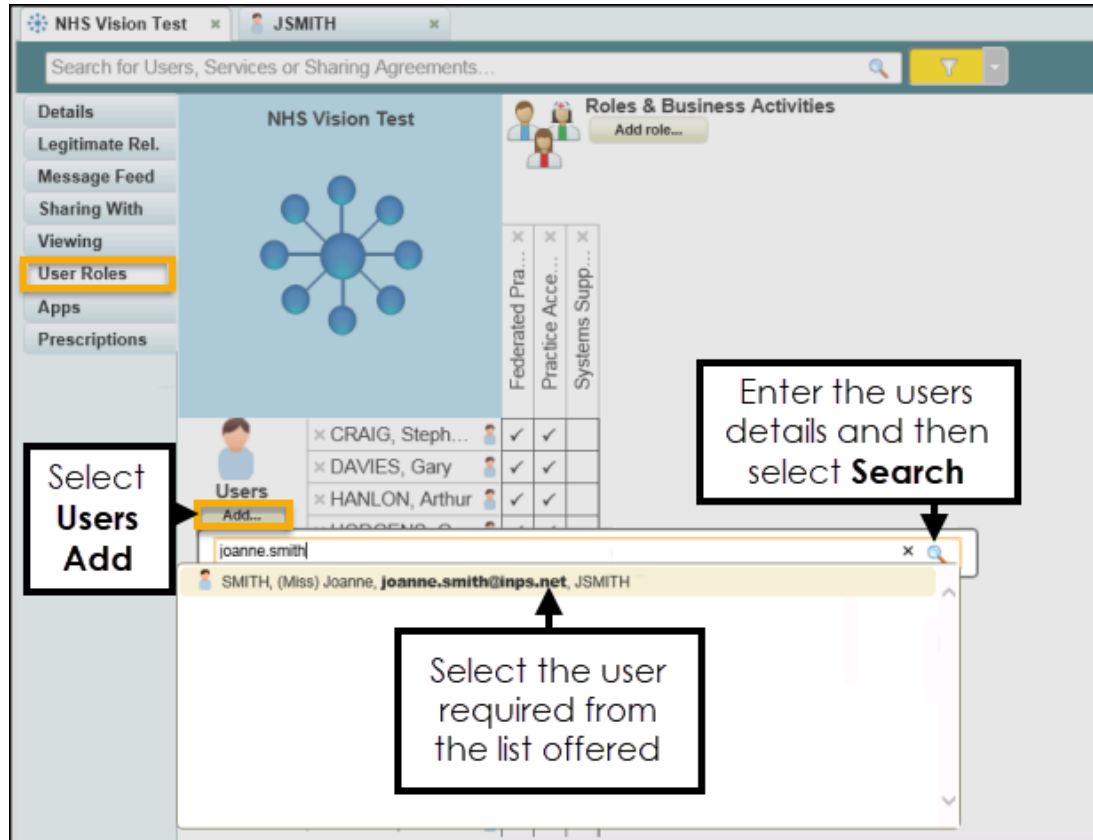
The screenshot shows a window titled "Professional Codes". It contains three input fields: "Code Type *" (a dropdown menu), "Code *" (a text box), and "Service" (a dropdown menu). At the bottom of the window are two buttons: "OK" and "Cancel".


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.