Setting Up a New User Checklist

This guide is a checklist to setting up a new user in **Vision 3**. It is meant as a training aid and as such is not exhaustive. Please refer to the relevant links for full reference to associated topics.

Setting Up a New User

Before setting up a new user, you need to obtain the following information:

- Personal information is required, such as Surname, Forename, Sex, Title, and Short name (this is unique to the user and displays in the journal)
- Role details, for example, nurse prescriber, GP, receptionist, secretary
- Prescribing numbers
- Registration details, for example, NMC Pin, GMC number
- Local GP codes, for example, HB number
- Email addresses

Roles and Requirements below details what codes are required and provides some examples.

Roles and Requirements

Partners

England	Northern Ireland	Scotland	Wales	Notes
GMP Code - 8 characters made up of the 6-character PPA number, for example, 345654, prefixed with a G and a unique check digit at the end. An example GMP number is G3456549.	**Prescribing Number** - 6 digit prescribing number.	**Prescribing Number** - Prescribing number is 5 digits and is prefixed with the HB cipher, for example G (Glasgow), N (Grampian). An example prescribing number is N12345.	**GMP Code** - 8 characters made up of the 6-character PPA number, for example, 345654, prefixed with a G and a unique check digit at the end. An example GMP number is G3456549.	This information is setup in **Management Tools** - **Control Panel** - **File Maintenance** - **Staff** See Adding Doctors for more details.
GMC Number - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	
HB Code - Local GP code provided by your CCG.	**HB Code** - Local GP code provided by your HB.	**HB Code** - Prescribing number without the check digit at the end, for example, N1234.	**HB Code** - Local GP code provided by your HB.	

Salaried GP

England	Northern Ireland	Scotland	Wales	Notes
GMP Code - 8 characters made up of the 6-character PPA number, for example, 345654, prefixed with a G and a unique check digit at the end. An example GMP number is G3456549.	**Prescribing Number** - 6 digit prescribing number.	**Prescribing Number** - Prescribing number is 5 digits and is prefixed with the HB cipher, for example G (Glasgow), N (Grampian). An example prescribing number is N12345.	**GMP Code** - 8 characters made up of the 6-character PPA number, for example, 345654, prefixed with a G and a unique check digit at the end. An example GMP number is G3456549.	This information is setup in **Management Tools** - **Control Panel** - **File Maintenance** - **Staff** See Adding Doctors for more details.
GMC Number - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	**GMC Number** - Unique for each GP 7 numeric characters.	

Registrars

England	Northern Ireland	Scotland	Wales	Notes
GMP Code - The registrar is linked to the responsible partner which automatically picks up the responsible partners GMP code.	**GMP Code** - The registrar is linked to the responsible partner which automatically picks up the responsible partners GMP code.	**Prescribing Number** - Each practice in Scotland has a generic prescribing number that is used for their registrars. You can either add this to the new registrar or create a generic salaried GP with this prescribing number and assign the Registrar to this generic salaried GP.	**GMP Code** - The registrar is linked to the responsible partner which automatically picks up the responsible partners GMP code.	For Med3s to be printed electronically, GMC Numbers must be recorded for all registrars. This information is setup in **Management Tools - Control Panel - File Maintenance - Staff.** See Adding Doctors for more details.
GMC Number - Unique for each Registrar - 7 numeric characters.	**GMC Number** - Unique for each Registrar - 7 numeric characters.	**GMC Number** - Unique for each Registrar - 7 numeric characters.	**GMC Number** - Unique for each Registrar - 7 numeric characters.	

Nurse Prescribers

England	Northern Ireland	Scotland	Wales	Notes
Prescribing Number - 8 character alphanumeric with the format NNANNNNA where N is a number and A is a letter, for example 12A3456B (upper or lower case is allowed).	**Prescribing Number** - 4 digit prescribing number.	**Prescribing Number** - 5 characters. The first character is the HB cipher, the second 2 are the unique identifier for the nurse and the last two identify the practice. The number is usually in the format of GDDAA (alphabetical only).	**Prescribing Number** - 8 character alphanumeric with the format NNANNNNA where N is a number and A is a letter, for example 12A3456B (upper or lower case is allowed).	This information is setup in **Management Tools** - **Control Panel** - **File Maintenance** - **Staff** See Adding Nurses for more details. Tick the supplementary prescriber box for Nurse Prescribers.
NMC Pin Number - Registration number.	**NMC Pin Number** - Registration number.	**NMC Pin Number** - Registration number, a mixture of letters and numbers with the nnannnna format, where a is a letter and n is a number.	**HSW Registration Number** - Registration number.	

Pharmacists

England	Northern Ireland	Scotland	Wales	Notes
Prescribing Number - This is the pharmacists RPSGB code.	**Prescribing Number** - This is the pharmacists RPSGB code.	**Prescribing Number** - A unique 7 letter code for each practice worked at.	**Prescribing Number** - This is the pharmacists RPSGB code.	This information is setup in **Management Tools** - **Control Panel** - **File Maintenance** - **Staff** See Adding Pharmacists for more details. Tick either the Supplementary or Independent prescriber as appropriate.
GPhC Registration number - Registration number.	**GPhC Registration number** - Registration number.	**GPhC Registration number** - A 7 digit code starting with a 2.	**GPhC Registration number** - Registration number.	

Paramedics

England	Northern Ireland	Scotland	Wales	Notes
Prescribing number - Record the Paramedics prescribing number. See Tip below.	**Paramedic Role** - Paramedics in Northern Ireland can be setup with a staff role but no prescribing number yet.	**Paramedic Role** - This is a 7 digit code, usually a unique code for each practice worked at.	**Prescribing number** - Record the Paramedics prescribing number.	This information is setup in **Management Tools** - **Control Panel** - **File Maintenance** - **Staff** See Adding Paramedics for more details. Tick the supplementary prescriber box for Paramedics.
		HCPC Number - A 7 digit code starting with PA		

Training Tip – For English Paramedics only, **Vision 3** uses 5 digits after the initial two alpha digits for validation. If the prescribing number has 6 digits after the initial 2 alpha digits, with a leading zero omit the leading zero. For example, PA012345 should be entered as PA12345.

Steps to Creating a New User in Vision 3

Step	Module or Function	Brief Description	Complete Yes/No
1	Login as a **System Administrator**.	At least one person in your practice should have administrator rights, if not, this can be set using the SYS role.	
2	**Staff Details** Management Tools – Control Panel – File Maintenance – Add Staff	You need to create a staff profile for the new user. See Adding Staff for more details. If your clinician is using the new Vision applications their email address must be setup within their staff details.	
3	**Security – Log in** Management Tools – Control Panel – Security	Security is where you setup a login and a temporary password. See Adding a User in Security for more details.	
4	**Staff Groups** Management Tools – Control Panel – File Maintenance – Staff Groups	If you use staff groups in Mail Manager or send tasks using Daybook/Tasks you must ensure the new user is added to the appropriate group. See Adding Users to Groups for more details.	

5	**Mail Maintenance** Management Tools – Control Panel – Mail Maintenance – Staff Access	You should check Mail Maintenance to make sure the new user has the correct staff access to mailboxes for example do they just need to view their mail, or can they access other mailboxes. See Mail Maintenance - Staff Access for more details.	
6	**User Profiles -Apps Controller** Apps Controller – System Utilities – User Profile Manager	Apps Controller enables you to setup user profiles that incorporates most of the Consultation Manager user settings. You can also copy another user's settings. See User Profile Manager for more details.	
7	**Consultation Manager User Settings** Consultation Manager – Options - Setup	Consultation Manager setup is used to check that you are using the correct view. All other setup is done in Apps Controller. See Consultation Manager Setup for more details.	
8	**Mail Manager Setup** Vision 3 front screen – Mail Manager at Start-up Mail Manager -Filter Mail Manager – Tools -Options	Mail Manager can be switched on so that it is launched at start-up. See Mail Manager Setup for more details. The number of messages shown in Mail Manager is determined by a date filter and needs to be customised for the new user. You can also quickly move onto the next message by selecting an option in Mail Manager. See Mail Manager What do I need to do? for more details.	

9	If using **Vision 3 Appointments**: Create a Book Owner Create a Personal Plan Change the Views Extend the Books	If you are going to book appointments for the new user, you need to create a book owner. See [Appointment Book Owners](#) for more details. Create a personal plan, see [Personal Plan](#) for more details Change the Reception of Book view to include the new owner, see [Saving Views](#) for more details. Extend the Books, see [Extend Books](#) for more details.	
	If using **Appointments** and **Appointments Setup**: Create a Book Owner Create a Weekly Plan Owner Extensions Extend the Books	If you are going to book appointments for the new user, you need to create a book owner. See [Adding a Book Owner - Staff](#) for more details. Create a weekly plan, see [Add Weekly Plans](#) for more details. Owner Extensions, see [Owner Extensions](#) for more details. Extend the Books, see [Extend Books](#) for more details.	
10	If using **Daybook**: Daybook - Tools - Options Daybook - Tasks - Maintain Frequent Task Lists	If using Daybook, you can personalise Daybook settings for dealing with tasks. See [Daybook Settings](#) for more details.	
	If using **Tasks**:	If using Tasks, you can personalise settings for dealing with tasks. See [Tasks](#) for more details.	

11	**Vision+** - Configuration and Settings	Each user has Vision+ settings which need to be adapted for the new user. See Vision+ Configuration and Settings for more details.	
12	**Control Panel** - File Maintenance - Online	If the new user is a clinician, you need to ensure that they are setup for patient online services. See Online Services Configuration for more details.	
13	**eLearning** Register your new user with the Learning zone	Register for access to the Learning Zone. See The Learning Zone for more details. **Note** - Internet Explorer 11 is not supported.	

Note - Steps 1 to 3 should be done first. The remaining steps can be completed in any order and should comply with your practice protocol.

Note - This list does not include how to setup items such as users on the network, ICE, SCI Gateway or Role base access for Smartcards etc.