



Newcomers and Leavers Vision

A guide on how to register new users
and remove any leavers



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1. Introduction

This document outlines the steps required to register and remove users from the DXS Point-of-Care system. It is very important to follow the subsequent steps; this will ensure that the user sees the correct CCG documents. Failing to do so may result in the incorrect CCG documents being displayed.

2. Newcomers – Enable DXS Point-of-Care

Follow your usual local practice procedures for adding the new user to the Vision system.

You will need to navigate into the Vision Control Panel in order to change user settings.

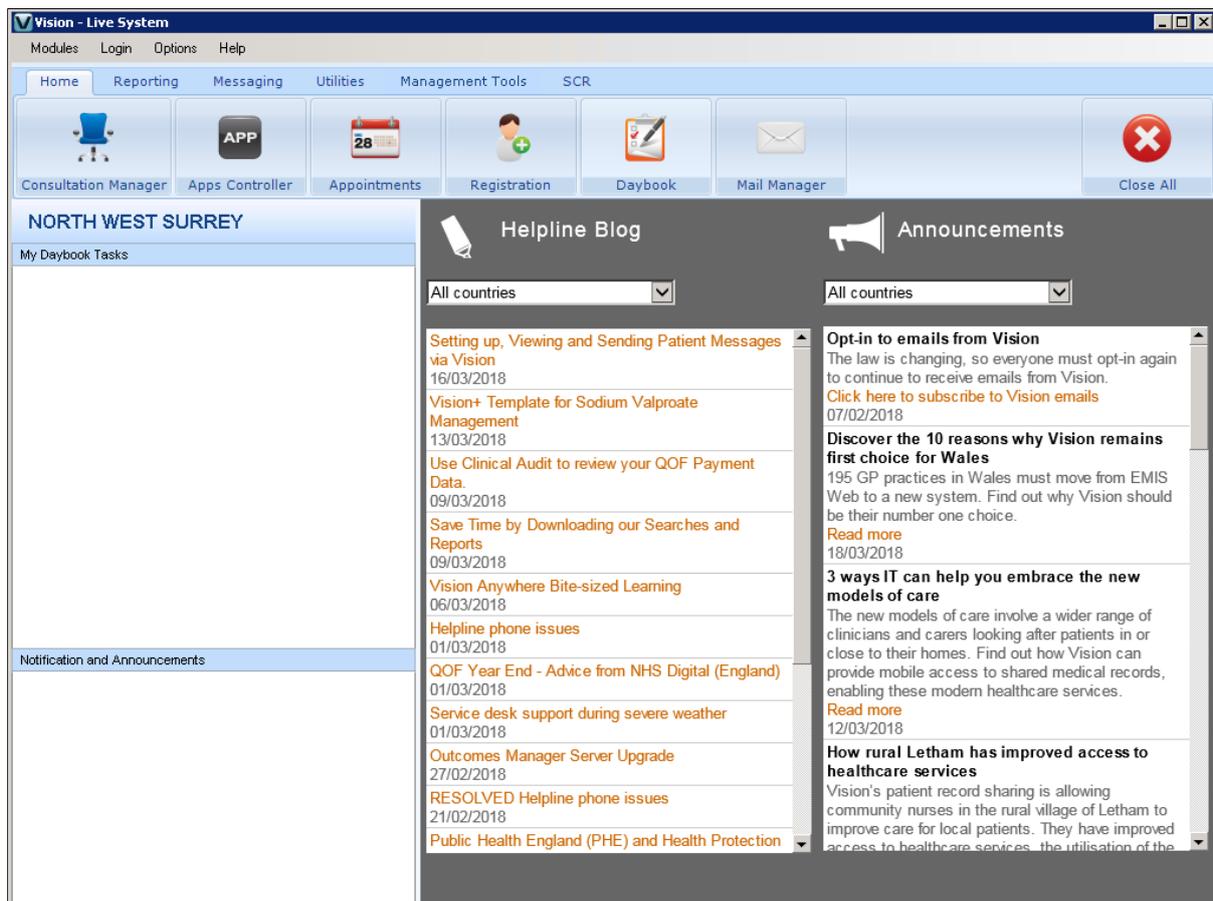


Figure 1: Vision Home Screen

1. Select the “Management Tools” tab.

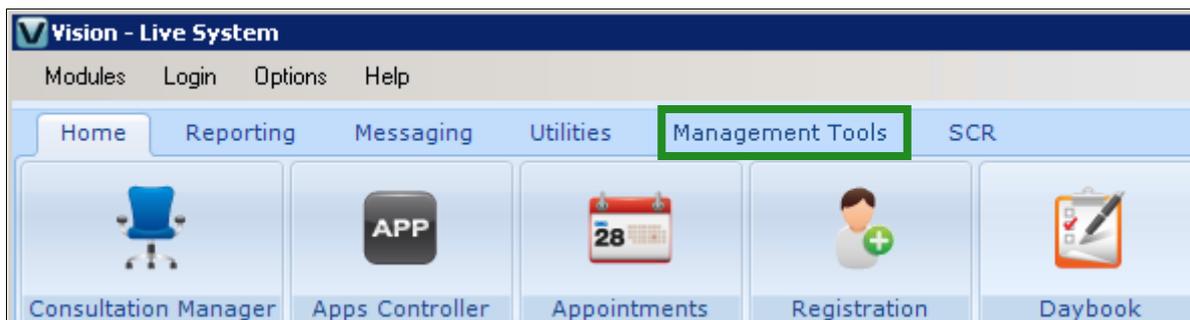


Figure 2: Management Tools

- This will open the “Management Tools” ribbon on the toolbar. Select the “Control Panel” option.

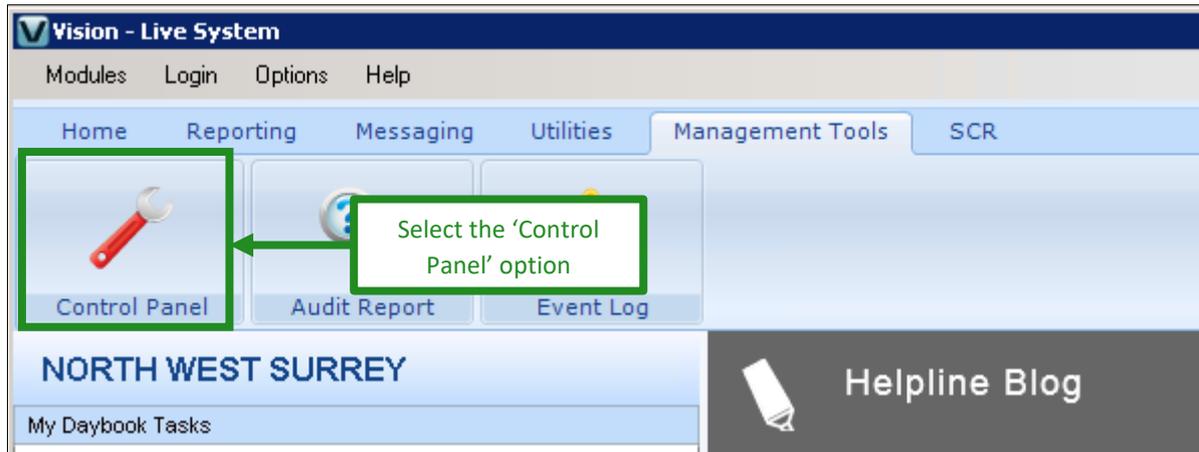


Figure 3: Management Tool Ribbon

- The Vision Control Panel will open. Click on “File Maintenance” and then select the relevant user.

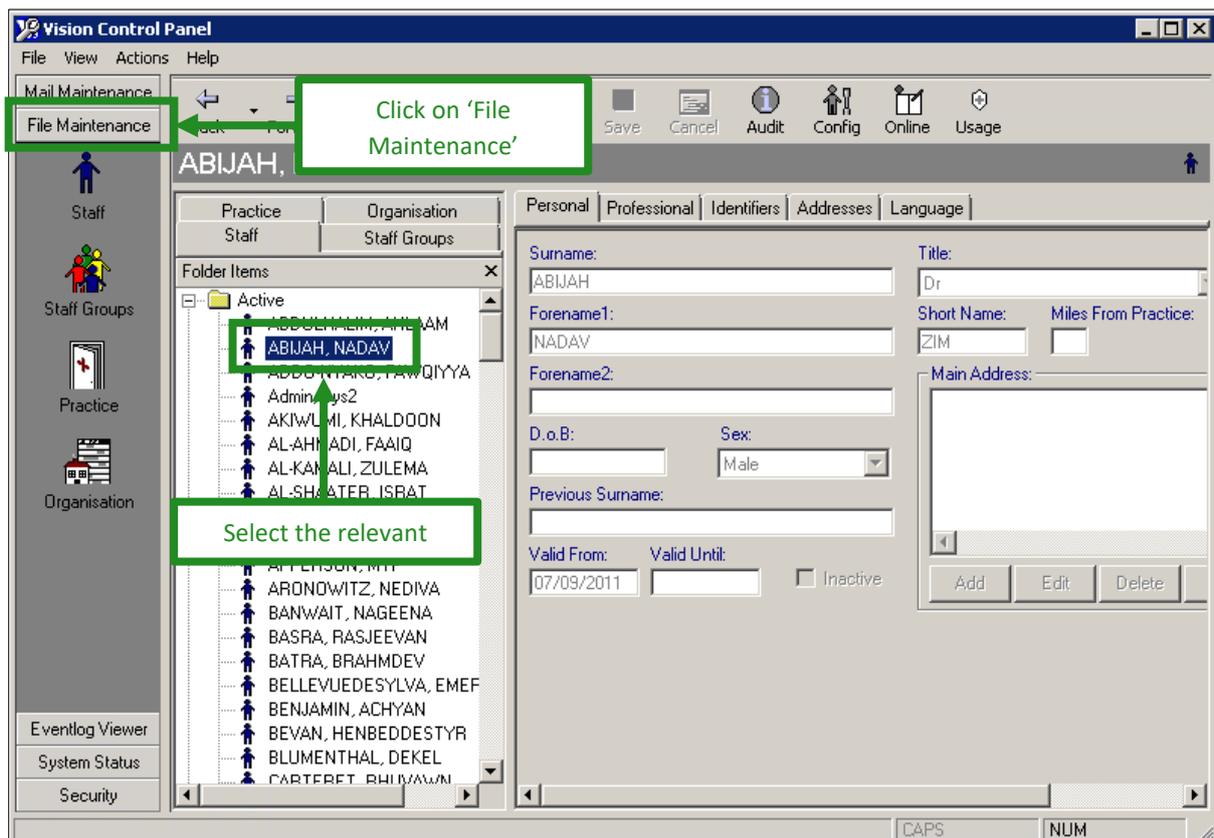


Figure 4: Control Panel

- The user's details will be displayed, with tabs labelled: Personal, Professional, Identifiers, Addresses and Language. Click on the "Professional" tab.

The screenshot shows a software window with five tabs: Personal, Professional, Identifiers, Addresses, and Language. The 'Professional' tab is selected and highlighted with a green box. The form contains the following fields and options:

- Role:** A dropdown menu with 'Locum' selected.
- Date Joined Practice:** A date field containing '07/09/2011'.
- Responsible Partner:** A dropdown menu with 'A Moonstone PRR' selected.
- Date Qualified:** An empty date field.
- GMP Code:** A text field containing 'G7777799'.
- Prescribing No:** A text field containing '777779'.
- Formulary:** A dropdown menu.
- Date Became Principal:** An empty date field.
- 24hr f:** An empty text field.
- Handwritten exempt:**
- Caseload Worker:**
- Discharge to Caseload:**
- DXS:**
- Type Of Employee:** A dropdown menu.
- Job Sharer:** A dropdown menu.
- Main Specialty:** A dropdown menu.
- Insurance Company:** A text field.
- Interest Specialty:** A dropdown menu.
- Insurance Expiry Date:** A date field.
- CHS:**
- Maternity:**
- Minor Surgery:**
- Contraception:**
- Supplemen:**
- Independent Presc.:**

At the bottom of the form are 'OK' and 'Cancel' buttons. The status bar at the very bottom shows 'CAPS' and 'NUM'.

Figure 5: Professional Tab

- To edit the user's details, click on the "Edit" button on the toolbar at the top of the window.

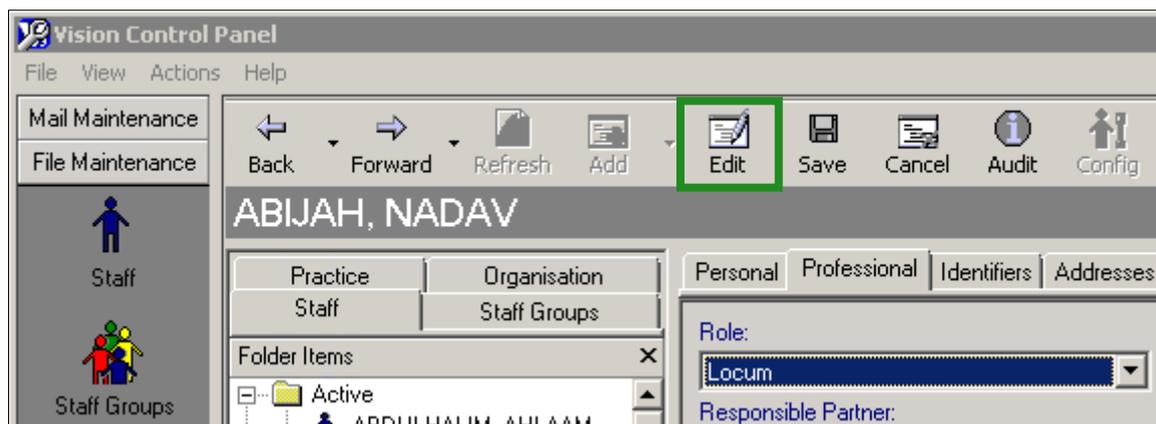


Figure 6: Edit Button

- To enable DXS for this user, tick the DXS box and click "OK".

The screenshot shows a dialog box titled 'Editing Details' with several tabs: Personal, Professional, Identifiers, Addresses, and Language. The 'Personal' tab is active. The form contains the following fields and controls:

- Role: Locum (dropdown)
- Date Joined Practice: 07/09/2011 (text)
- Responsible Partner: A Moonstone PRR (text)
- GMP Code: G7777799 (text)
- Prescribing No: 777779 (text)
- Formulary: (dropdown)
- Date Became Principal: (text)
- 24hr f: (text)
- Handwritten exempt:
- Caseload Worker:
- Discharge to Caseload:
- DXS: (highlighted with a green box)
- Type Of Employee: (dropdown)
- Job Sharer: (text)
- Main Specialty: (dropdown)
- Insurance Company: (text)
- Interest Specialty: (dropdown)
- Insurance Expiry Date: (text)
- Insurance: (text)
- CHS:
- Maternity:
- Minor Surgery:
- Contraception:
- Supplement:
- Independent Presc.:
- OK button (highlighted with a green box)
- Cancel button

At the bottom of the dialog box, there are two small buttons: CAPS and NUM.

Figure 7: Editing Details

- Repeat steps 3 to 6 for any other relevant people.
- Once complete, you will need to exit the Vision Control Panel.
- Please then send a request to support-uk@dxs-systems.com, detailing the names of any new users, your practice name and NAC/ODS code and CCG name.

NB: This is an essential step and will ensure that the user sees the correct CCG documents. Without doing so, the user might not see any CCG documents.

3. Auto-subscription

New users will have access to their CCG content and/or shared content as soon as they open DXS. They inherit this content based on what other users at their practices are subscribed to. They will, however, still need to be registered for reporting and other purposes, but this will not impact the user directly as they will already be able to see their content.

In the case of new practices, user will still need to be registered and subscribed manually before they can see content, seeing that there has never been a subscription from which these users can inherit content.

4. Leavers – Disable DXS Point-of-Care

Follow your usual local practice procedures for removing a user from the Vision system.

You will need to navigate into the Vision Control Panel in order to change user settings.

1. To disable DXS Point-of-Care, follow the steps as outlined above, untick the DXS box and click "OK".

The screenshot shows a 'Personal' tab in a 'Editing Details' dialog. The 'Role' dropdown is set to 'Locum'. The 'Date Joined Practice' is '07/09/2011'. The 'Responsible Partner' is 'A Moonstone PRR'. The 'GMP Code' is 'G7777799' and the 'Prescribing No' is '777779'. There are checkboxes for 'Handwritten exempt', 'Caseload Worker', 'Discharge to Caseload', and 'DXS'. The 'DXS' checkbox is unchecked. Below these are fields for 'Type Of Employee', 'Job Sharer', 'Main Specialty', 'Insurance Company', 'Interest Specialty', and 'Insurance Expiry Date'. At the bottom, there are checkboxes for 'CHS', 'Maternity', 'Minor Surgery', 'Contraception', 'Supplement', and 'Independent Presc.'. The 'OK' and 'Cancel' buttons are at the bottom. Green annotations highlight the 'DXS' checkbox and the 'OK' button with arrows and text boxes.

Figure 8: Editing Details

2. Repeat for any other relevant people.
3. Once complete, you will need to exit the Vision Control Panel.
4. Please then send a request to support-uk@dxs-systems.com, detailing the names of any users that are leaving, your practice name and NAC/ODS code and CCG name.

5. DXS Support

5.1 Problems?

If you are having any problems registering or removing users or experiencing any technical issues with DXS Point-of-Care, please get in touch with our service desk and one of the members of our team will be more than happy to help you.

✉ support-uk@dxs-systems.com

☎ **0800 028 0004** option 1

5.2 Service desk hours of operation

Monday–Friday	07:30–19:00
Saturday	09:00–13:00
Sunday	Closed

5.3 DXS Training

To view more DXS Training Guides visit our training website at <http://training.dxs-systems.com/>.