

Procedure for creating / fixing issues with EPRO user accounts

This procedure assumes that the user being set up has a functional active directory (AD) account in place

Step 1: Confirm training details

1.1: Ensure EPMA training has been completed before proceeding. If training has not been completed yet direct the caller to the online EPMA training resource to complete the EPMA training relevant to their role

<https://www.epmatraining.org> - an automatic confirmation email will be sent to EPMA@wvt.nhs.uk and CSG@wvt.nhs.uk when the training and assessment is completed.

If required, look up training completion details by searching for the caller's details (name / registration number) in the training records in the EPMA inbox under the 'completed training' subfolder for most users, or in the 'ID medical subfolder' for ID medical staff.

1.2: Visit <https://www.nmc.org.uk/registration/search-the-register/> for Nurses / Midwives or <https://www.gmc-uk.org/registration-and-licensing/the-medical-register> for Medical staff and confirm that the individual is registered under the profession for which they require access.

Step 2: Create / activate an EPRO user account

2.1: First, check if the individual already has an EPRO user account in place. To do this, access the EPRO directory and search for the individual by surname. Most EPRO user accounts have the account holder's own professional registration number listed under 'practitioner code' to enable you to confirm ownership of the user account by the individual.

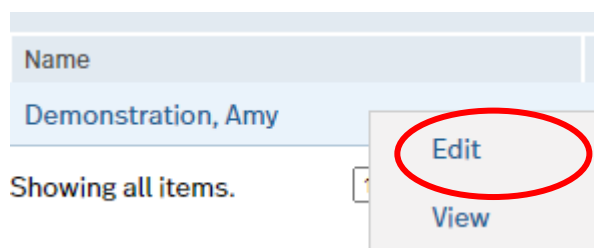
The screenshot shows the EPRO system interface. At the top, there is a 'Menu' dropdown with options: Administrator, Auto correct / auto text, Coding, Dictate, and Directory. The 'Directory' option is selected. Below the menu, the 'Directory' page is displayed. It has a search bar with the text 'surname forename postcode' and a '+ add' button. The search results are filtered by 'Epro Users'. The search criteria are: Surname 'demonstration', Role (empty), and User name (empty). The results table shows one user: 'Demonstration, Amy' with User Name 'amy.demonstration', Suspend Date (empty), Active status 'yes', Last Login '01 Jun 2022 14:23', Practitioner Code '15B1159F', and Security Group 'Nurse'. The table also shows 'Showing all items.' and '100 items per page'.

Name	User Name	Suspend Date	Active	Last Login	Practitioner Code	Security Group
Demonstration, Amy	amy.demonstration		yes	01 Jun 2022 14:23	15B1159F	Nurse

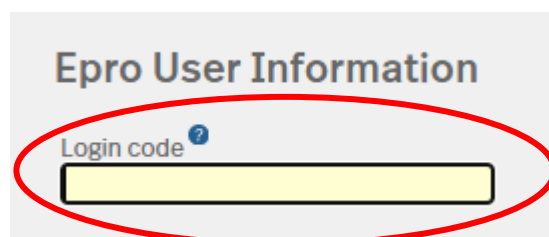
2.2.1: If the individual **does have** their own EPRO account in place then this can be checked and edited to ensure all the necessary details are present and correct, see fields circled above

- **The user name field** should precisely match the user's active directory (AD) username. This is not case sensitive, but any other errors will result in the login not working for the user. Check this carefully as this could easily be the cause of a login problem
- **The suspend date field** should be empty. If there is a date entered in this field it will block access to EPRO from the chosen date onwards. Suspended accounts are often set up by the EPMA management team in lieu of training completion so the account is mostly set up and ready
- **The last login date** can be an important indicator. If this date is more than 90 days ago then the user's EPRO account may well be fine and the issue is that the underlying active directory account or 'Trust login' has been frozen due to inactivity

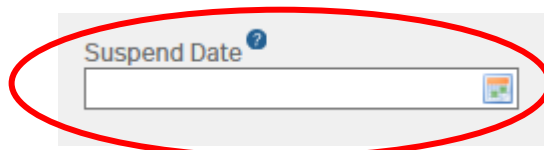
If there are any modifications needed to the EPRO user account, **right click** on the directory entry and click **Edit** to open the user's EPRO account for editing



If the **Login code** (active directory username) is wrong or absent then this can be amended here



Ensure the **Suspend date** field is empty



If the **Practitioner code** field is empty but you have confirmed satisfactorily the ownership of the EPRO account, enter the caller's professional registration number now. This is not mandatory but is good practice.

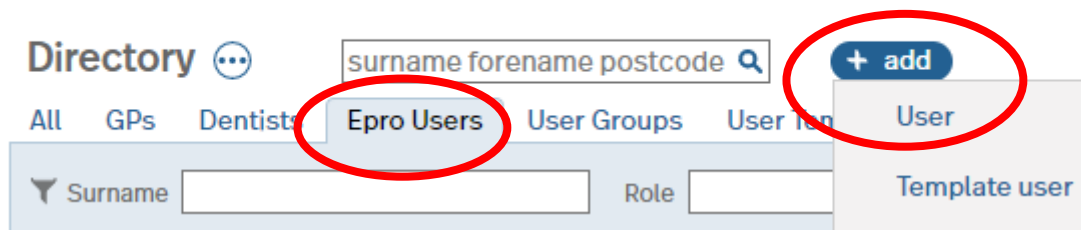


Click **save**



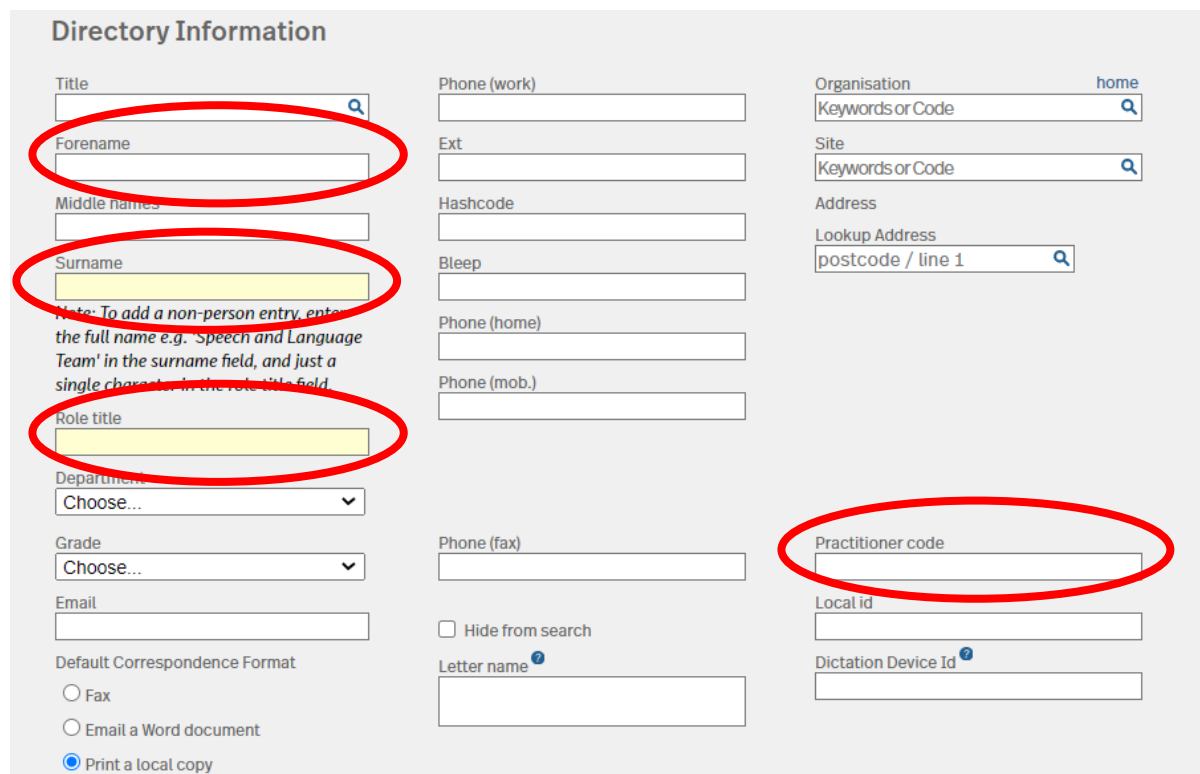
2.2.2: If the individual **does not have** an EPRO user account already then create a new one for them. In the user directory menu click **add** and select **User** to open a new user account entry template

Directory



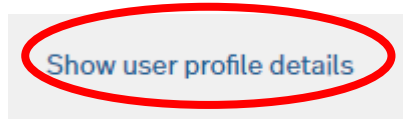
The screenshot shows the 'Directory' menu with a search bar containing 'surname forename postcode'. Below the search bar are tabs for 'All', 'GPs', 'Dentists', 'Epro Users', 'User Groups', and 'User Information'. The 'Epro Users' tab is highlighted. To the right of the tabs is a '+ add' button, which is circled in red. Below the '+ add' button is a dropdown menu with 'User' and 'Template user' options. The 'User' option is circled in red. Below the tabs are input fields for 'Surname' and 'Role'.

Ensure all mandatory fields are completed with the individual's **name, role, and professional registration number** (which is entered under 'practitioner code')

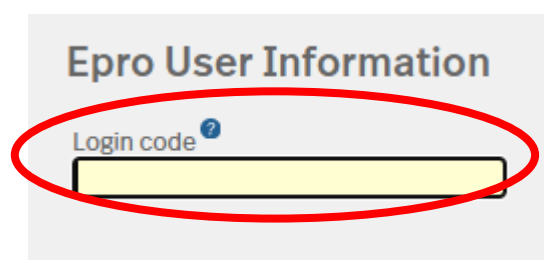


The screenshot shows the 'Directory Information' form. The form is divided into three columns. The first column contains fields for 'Title', 'Forename', 'Middle names', 'Surname', 'Role title', 'Department', 'Grade', 'Email', and 'Default Correspondence Format'. The 'Forename', 'Surname', and 'Role title' fields are highlighted in yellow and circled in red. The second column contains fields for 'Phone (work)', 'Ext', 'Hashcode', 'Bleep', 'Phone (home)', 'Phone (mob.)', 'Phone (fax)', and 'Letter name'. The third column contains fields for 'Organisation', 'Keywords or Code', 'Site', 'Keywords or Code', 'Address', 'Lookup Address', 'postcode / line 1', 'Practitioner code', 'Local id', and 'Dictation Device Id'. The 'Practitioner code' field is highlighted in yellow and circled in red. A note is present: 'Note: To add a non-person entry, enter the full name e.g. 'Speech and Language Team' in the surname field, and just a single character in the role title field.'

Click **Show user profile details** and under the **Login Code** section enter the user's **active directory (AD) username** here. Check this is done exactly right as it is easy to make an error here. This field is not case sensitive.

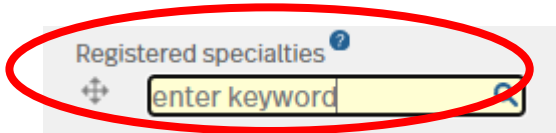


The screenshot shows a button labeled 'Show user profile details', which is circled in red.

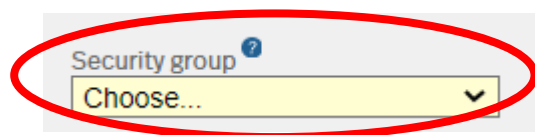


The screenshot shows the 'Epro User Information' form. The 'Login code' field is highlighted in yellow and circled in red. The field is labeled 'Login code' with a question mark icon.


Enter the individuals **registered speciality** if applicable, or put 'not known' or 'non-medical' if appropriate

A screenshot of a web form showing a label 'Registered specialties' with a blue question mark icon. Below the label is a text input field containing the placeholder text 'enter keyword'. A red circle is drawn around the entire input area.

Assign a suitable **Security group** to the individual's EPRO user account to ensure they access to the right system permissions for their role. There are a large number of these to select from and it is important to choose the right one as it controls what the user can and cannot do in the system. The user's profession and the training record would usually be expected to provide enough detail to choose the right security group. If you are unsure ask to speak to the Nurse in charge on the ward to confirm. If you wish you can email the EPMA@wvt.nhs.uk inbox with the user's details to ask the EPMA management team to check the user account the next working day.

A screenshot of a web form showing a label 'Security group' with a blue question mark icon. Below the label is a dropdown menu with the text 'Choose...' and a downward arrow. A red circle is drawn around the entire dropdown area.

When you are done, click save

A screenshot of a web form showing a blue button with the text 'SAVE' in white capital letters. A red circle is drawn around the button.

2.3: The individual should now have access to EPRO by logging in using their usual AD credentials. Check the user is able to log in before ending the call.