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.

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
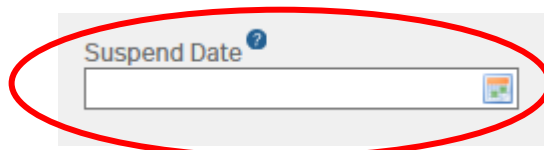
If there are any modifications needed to the EPRO user account, **right click** on the directory entry and click **Edit** to open the user's EPRO account for editing
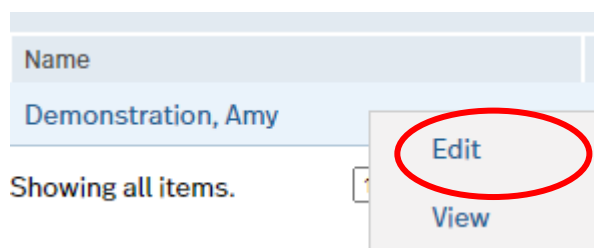
If the **Login code** (active directory username) is wrong or absent then this can be amended here
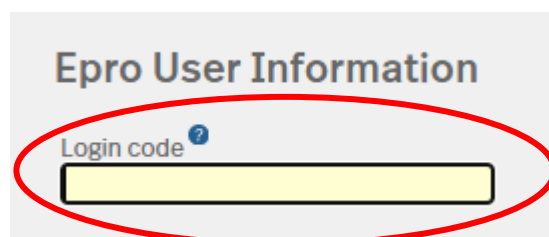
Ensure the **Suspend date** field is empty

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.
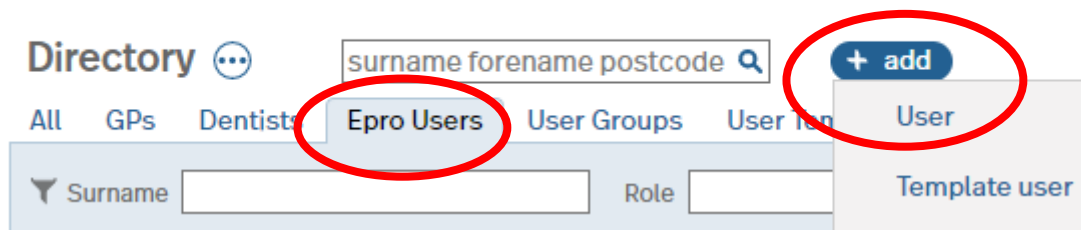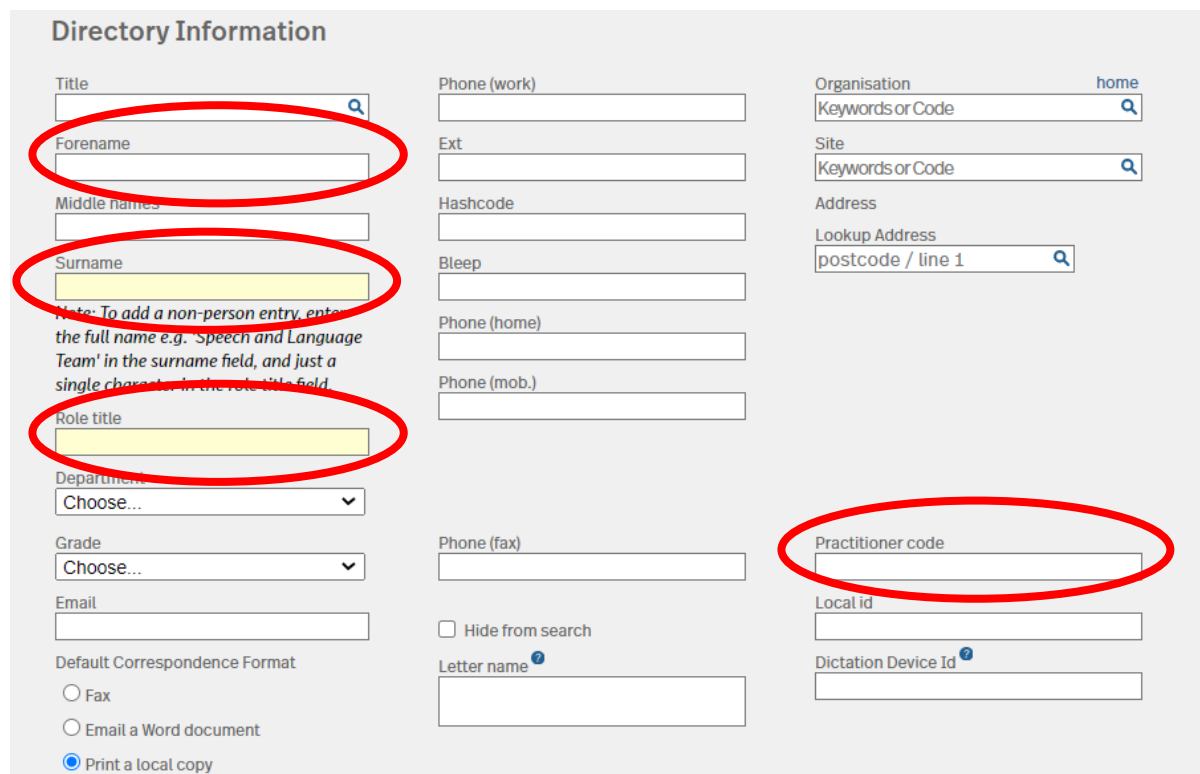

Click **save**

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
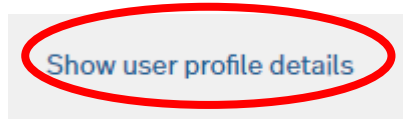

Ensure all mandatory fields are completed with the indiviudal's **name, role, and professional registration number (which is entered under 'practitioner code')**
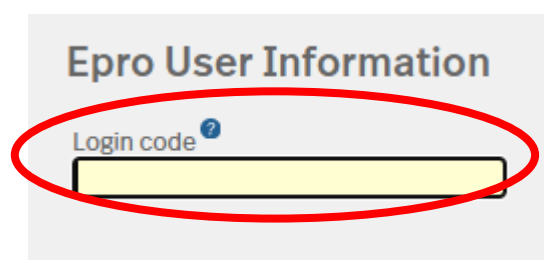

Click **Show user profile details** and under the **Login Code** section enter the user's **active directory (AD) username** here. Check this is done exactly right as it is easy to make an error here. This field is not case sensitive.
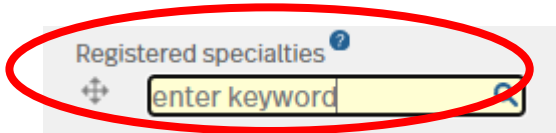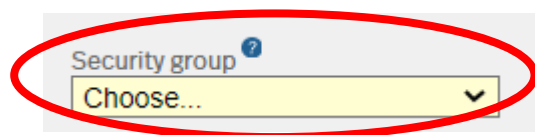
Enter the individuals **registered speciality** if applicable, or put 'not known' or 'non-medical' if appropriate

Registered specialties

enter keyword

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 is 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.

Security group

Choose...

When you are done, click save

SAVE

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.