

Procedure for changing EPRO directory security group in a user account

This procedure assumes that there are no other issues with the user's access to EPMA other than EPRO security group

Step 1: Confirm details

1.1: Identify the EPRO security group that corresponds to the affected user's role in the organisation (see appendix 1 for a full list)

1.2: Ensure the relevant 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 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: Locate and edit EPRO user account

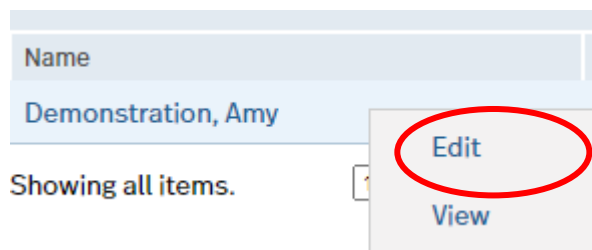
2.1: First, search for and confirm the affected user's EPRO user account in the EPRO directory. To do this, access the EPRO directory and search for the individual by surname. Most EPRO user accounts have the account holder's own professional registration number listed under 'practitioner code' to enable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

The user account will show which EPRO user security group is currently in place.

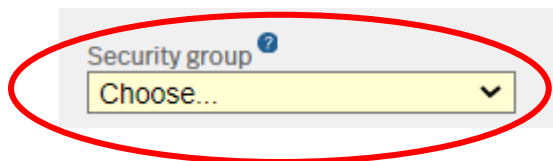
The screenshot shows the EPRO directory interface. At the top, there is a header 'Epro - Modular EPR' with a 'Menu' dropdown and tabs for 'Patients' and 'Tasks'. The 'Menu' dropdown is open, showing options like 'Administrator', 'Auto correct / auto text', 'Coding', 'Dictate', and 'Directory'. The 'Directory' option is highlighted. Below this, the 'Directory' section is visible, showing a search bar with 'surname forename postcode' and a '+ add' button. The search results are displayed in a table with columns: Name, User Name, Suspend Date, Active, Last Login, Practitioner Code, and Security Group. The search results show a user named 'demonstration' with the user name 'amy.demonstration', active status 'yes', last login '01 Jun 2022 14:23', practitioner code '15B1159F', and security group 'Nurse'. The 'Epro Users' tab is selected in the top navigation bar.

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

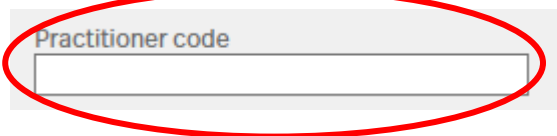
2.2: If the EPRO security group is confirmed to be incorrect for the user's role, this can be edited. To edit, **right click** on the directory entry and click **Edit** to open the user's EPRO account for editing



Locate the Security group field in the user's account and change it to the correct one



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**



2.3: The individual should now have the system permissions they need to perform their role. The user will need to log out and then back in again to activate the new security group. Check the user is able to do what they need to before ending the call.

Appendix 1: List of EPRO user directory security groups and associated organisational roles / requirements

EPRO directory security group	Job Role descriptions associated with these security groups <i>Ensure relevant professional registration and completion of suitable training have been confirmed before adding / changing security permissions</i>
Administrator	EPMA management team only, never assign this to anyone out of hours
Nurse Agency	Agency Nurses, Band 4 Nursing Associates Nurse training, NMC registration
AHP	HCAs, or any role needing read only access to EPMA Read only training (informal)
Dietician	Dieticians Prescriber training, HCPC registration
Doctor	Doctor for adult patients (all grades) Prescriber training, GMC registration
Information Department	Information officer Read only training (informal)
Doctor Locum	Locum Doctor for adult patients Prescriber training, GMC registration
Doctor Paeds Locum	Locum Doctor in paediatrics Prescriber training, GMC registration
NMP	Nurse non-medical prescriber, other types of non-medical prescriber (NMP or IP) in adult patients Nurse training, NMC registration
NMP Paeds	Nurse non-medical prescriber, other types of non-medical prescriber (NMP or IP) in children Nurse training, NMC / HCPC registration
Nurse	Staff Nurse band 5/ Jnr Sister/ Sister/ Nurse specialist roles in adult patients (non-prescriber) Nurse training, NMC / HCPC registration
Paeds Nurse	Staff Nurse band 5/ Jnr Sister/ Sister/ Nurse specialist roles in children (non-prescriber) Nurse training, NMC registration
Doctor Paeds	Doctor in paediatrics (all grades) Prescriber training, GMC registration
Pharmacists ACT	Pre-reg Pharmacists/ Pharmacists/ Prescribing pharmacists (NMP / IP) Pharmacy training/ GPhC registration
Pharmacy ATO	Pharmacy ATO/ Senior Pharmacy ATO Pharmacy training
Pharmacy Technician	Pharmacy Technician/ trainee pharmacy technician Pharmacy training/ GPhC registration
Physicians Associate	Physicians Associate Prescriber training
Student Nurse	Student Nurse/ Trainee Nursing associates/ OSCE nurse prior to registration Nurse training
Midwife	Midwives (including locums) Nurse training, NMC registration
Ward Clerk	Ward clerks/ Assistants Ward clerk training
Allergies only	Any staff member who does not use EPMA directly but requires this level of system access to enable them to enter allergies through the iframe in Maxims No formal training or professional registration needed
Expired access	This is assigned to users who are identified as having dormant accounts that have gone unused for a prolonged period. Role related EPRO security permissions can be restored on request