



Outcomes
Manager

Outcomes Manager GP User Guide

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Table of Contents

Outcomes Manager GP	5
Signing In	6
Administration	8
Administration Options	8
User Accounts	9
Add User	10
Edit User	14
Logged in Users	18
Notifications	20
Edit or Delete Notifications	23
Patient Consent	25
Opt out of Sharing Data	26
Enable Sharing of Data	27
Sharing Patient Identifiable Data with Selected Organisations/Extracts ...	28
Patient Extracts	30
Opt In to Data Sharing	30
Read Codes	30
SNOMED Concepts	30
Opt Out of Data Sharing	31
Read Codes	31
SNOMED concepts	31
Template Management	32
Edit Template Properties	33
Formatting	35
Available Templates	44

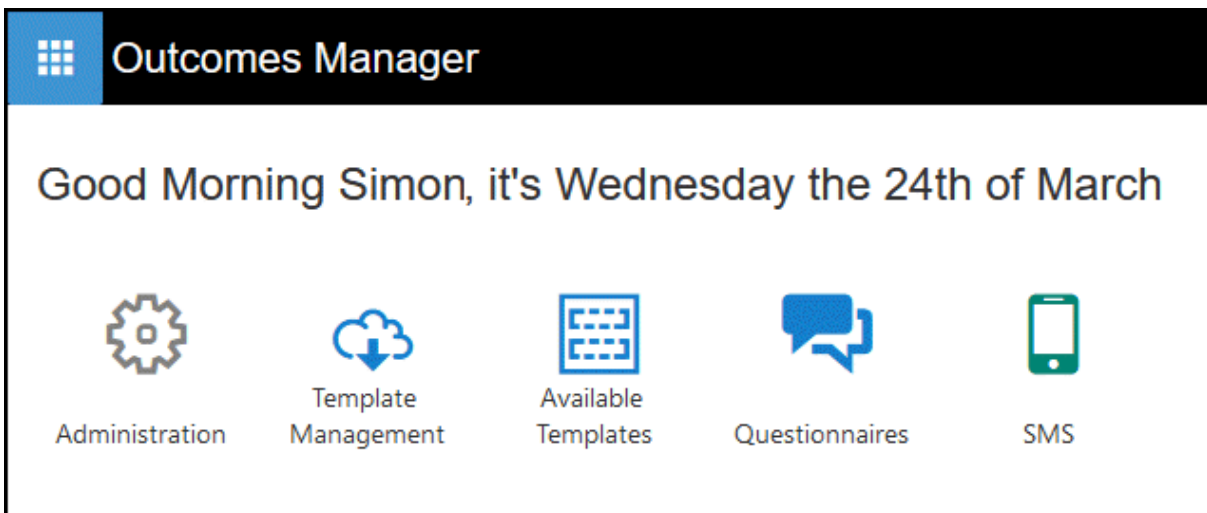
Searching for a Template	46
Using Filters	47
Download Templates	48
Message Author	50
Remove Template	51
Viewing Extracted Data	52
Filters	54
Apply Filters	54
Export Data	55
Reporting - Add Data	57
Questionnaires	59
To Access/View Questionnaires	60

Outcomes Manager GP

A simple and innovative approach to population health management, Outcomes Manager uses a cloud based dashboard for monitoring and reporting on patient data and outcomes across geographic areas.

Outcomes Manager GP enables you to:

- **Manage your user accounts**
See - [Add User on page 10](#), [Edit User on page 14](#) and [Logged in Users on page 18](#).
- **Manage Data Sharing options**
See - [Patient Consent on page 25](#).
- **View data extracted from your practice**
See - [Viewing Extracted Data on page 52](#).



The screenshot shows the Outcomes Manager dashboard interface. At the top left, there is a blue header with a grid icon and the text "Outcomes Manager". Below the header, a greeting reads "Good Morning Simon, it's Wednesday the 24th of March". Underneath the greeting, there are five icons representing different dashboard sections: a gear for "Administration", a cloud with a downward arrow for "Template Management", a keyboard for "Available Templates", two speech bubbles for "Questionnaires", and a smartphone for "SMS".



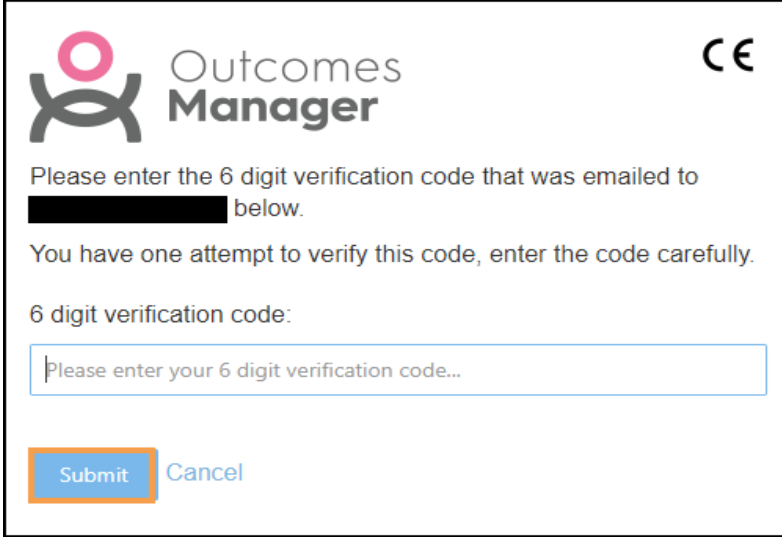
Note - The options available may vary by practice.


Signing In

Outcomes Manager uses **Two Factor Authentication (2FA)** to provide additional security to your account.

This generates an email to your registered email address containing a unique 6-digit security code.

1. When signing into Outcomes Manager a message displays "Please enter the 6 digit one time password that was emailed to XXXXX@nhs.uk in the text box below".



 Outcomes
Manager CE

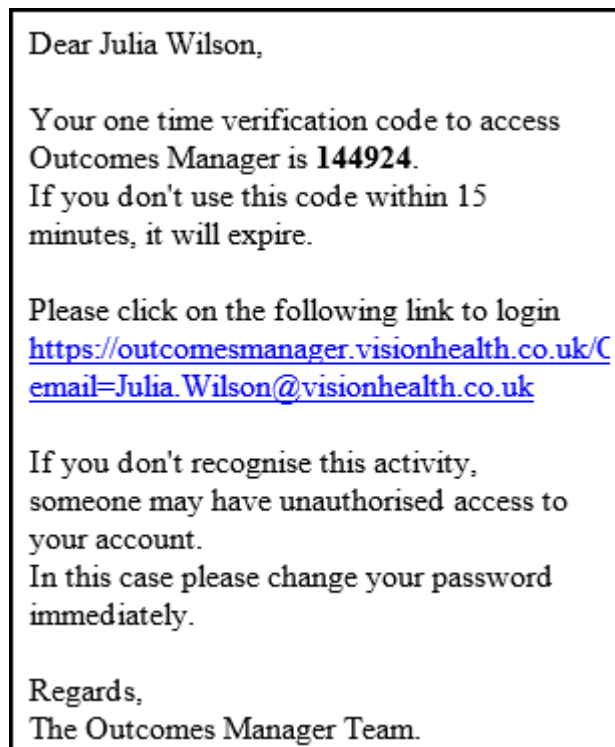
Please enter the 6 digit verification code that was emailed to [REDACTED] below.

You have one attempt to verify this code, enter the code carefully.

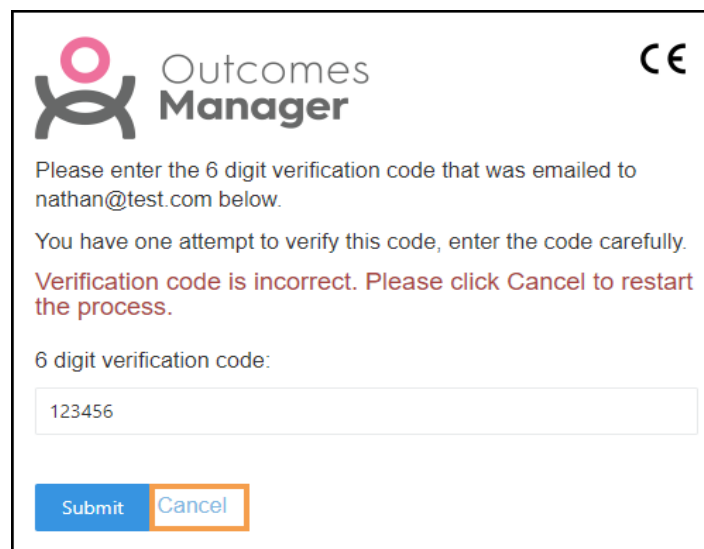
6 digit verification code:

An email automatically generates to your registered email address.

2. Select the link in the email.

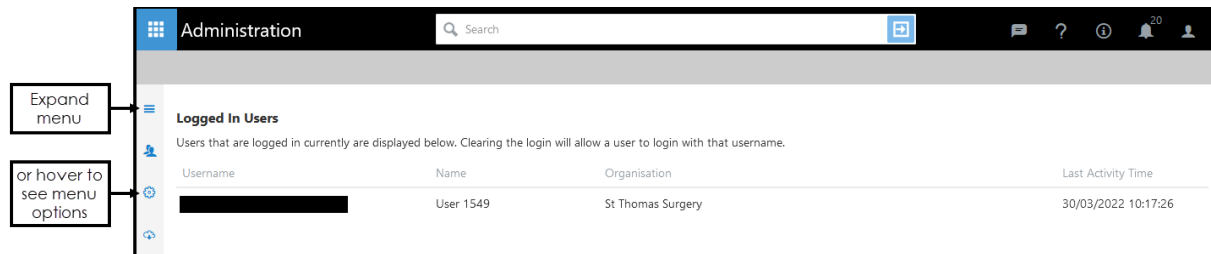


3. Enter your unique 6-digit code.
You can now use **Outcomes Manager**.
4. If you enter an incorrect number a message "Security code is incorrect. Please click Cancel to restart the process." displays.
Select **Cancel**.



Administration

The **Administration** section of **Outcomes Manager GP** enables you to manage users, licences, notifications, and sharing of data.



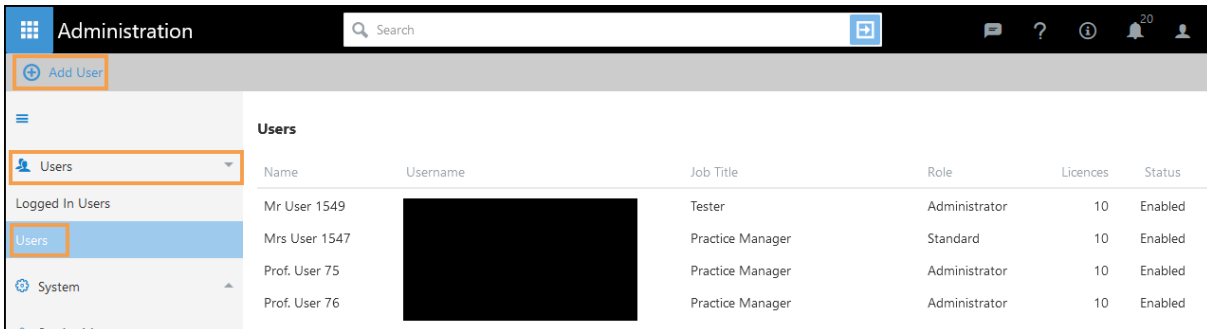
Administration Options

- **Users**
Create and manage user accounts, passwords and licences.
See - [User Accounts on the next page](#).
- **System**
Create and manage the notifications that display to your practice.
See - [Notifications on page 20](#).
- **Service Management**
Manage **Patient Data Sharing Consent** for exports of patient identifiable data.
See - [Patient Consent on page 25](#).

User Accounts

After selecting the **Administration** tile, you can access the **Users** section from the left menu.

This includes all **Users** (Active and inactivated within 28 days) for your practice.



Administration						
Search						
Add User						
Users						
Name	Username	Job Title	Role	Licences	Status	
Mr User 1549		Tester	Administrator	10	Enabled	
Mrs User 1547		Practice Manager	Standard	10	Enabled	
Prof. User 75		Practice Manager	Administrator	10	Enabled	
Prof. User 76		Practice Manager	Administrator	10	Enabled	

Administrators have full control of managing the user list for your practice including:

- **Creating User Accounts**
See - [Add User on the facing page.](#)
- **Edit or Inactivating User Accounts**
See - [Edit User on page 14.](#)
- **Reset Passwords**
See - [Change Password.](#)
- **Unlock Accounts**
See - [Logged in Users on page 18.](#)

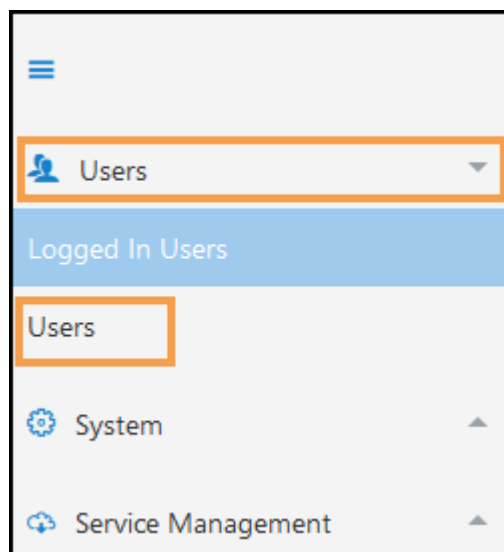
[→](#) See - [Administration on the previous page.](#)

Add User

Adding a **User** involves two stages:

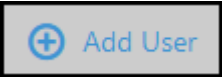
- Enter **User Detail**
- Allocate **Licences**

1. From the **Home** page select the **Administration** tile.
The **Logged in Users** list displays.
2. Select **Users** from the menu.



Users list displays.

3. From the upper left corner, select **Add User**

 A rectangular button with a blue plus sign icon and the text "Add User" in blue.

The **Add New User** pop-up displays.

Add User ✕

Save
Discard

Information ▼

Title:
Select title ▼

Name: Please enter a name **Surname:** Please enter surname

Email: Please enter an email **Job Title:** Please enter a job title

Authentication Type:
Select authentication type ▼

Enabled:

Organisation Details ▼

Organisation:
Select an organisation ▼

Roles:
▼

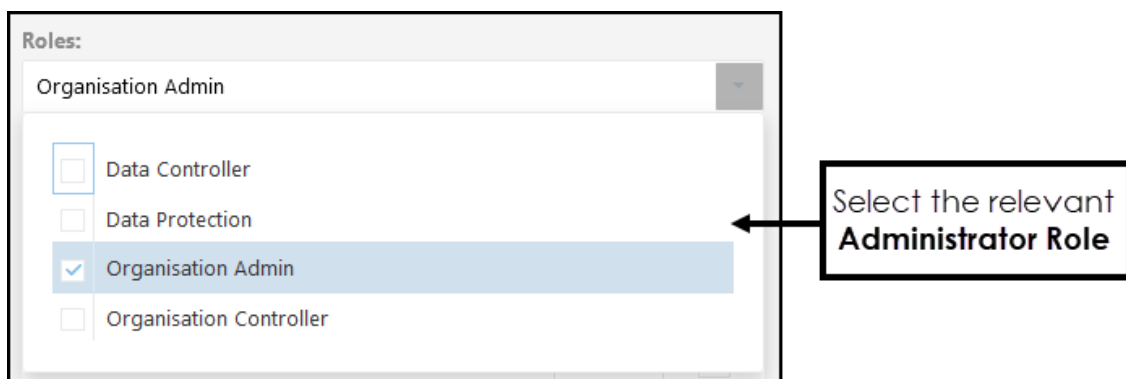
Licences:

Product	Available	Assign
Central Reporting Dashboard	23	<input type="checkbox"/>

4. In the **Information** section, enter the following:

- **Title** (Mandatory)
 Choose from the drop-down list:
Ms, Miss, Mrs, Mr, Dr or Prof.

- **Name** (Mandatory)
 - **Surname** (Mandatory)
 - **Email Address** (Mandatory)
This must be an email address.
 - **Job Title**
 - **Authentication Type** (Mandatory)
Choose from **Normal authentication** or **Two Factor authentication - email** (recommended).
 - **Enabled** (selected by default) activates the user.
5. In the **Organisation Details** section your organisation populates automatically.
6. To set the user as an **Administrator**, select the **Is administrator** checkbox.



7. In the **Licences** section select **Assign** to allocate available product licenses.

Licences:		
Product	Available	Assign
Questionnaires	96	<input checked="" type="checkbox"/>
Vision+	96	<input checked="" type="checkbox"/>
Vision+ - Pathways	96	<input checked="" type="checkbox"/>
Vision+ - QOF	96	<input checked="" type="checkbox"/>
Vision+ - SMS Replies	96	<input checked="" type="checkbox"/>
Vision+ - Warfarin/INR	96	<input checked="" type="checkbox"/>

8. Select **Save** to add the new user.

An email generates to notify the user and includes a system generated password, which they are prompted to change on first use.

 See - [Edit User](#).

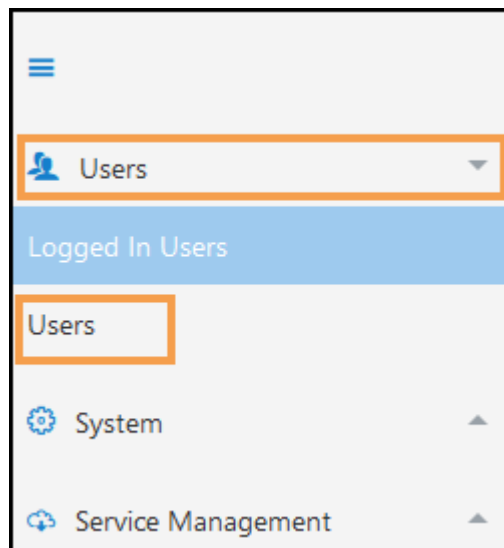
Edit User

The **Edit User** function enables you to:

- **Amend User Details**
- **Inactivate User**
- **Set/remove Administration rights**
- **Update Licences**

To select a user:

1. From the main **Dashboard** select the **Administration** tile.
2. Select **Users** from the menu.

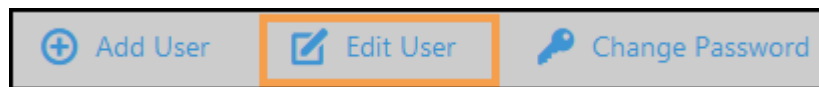


Users list displays.

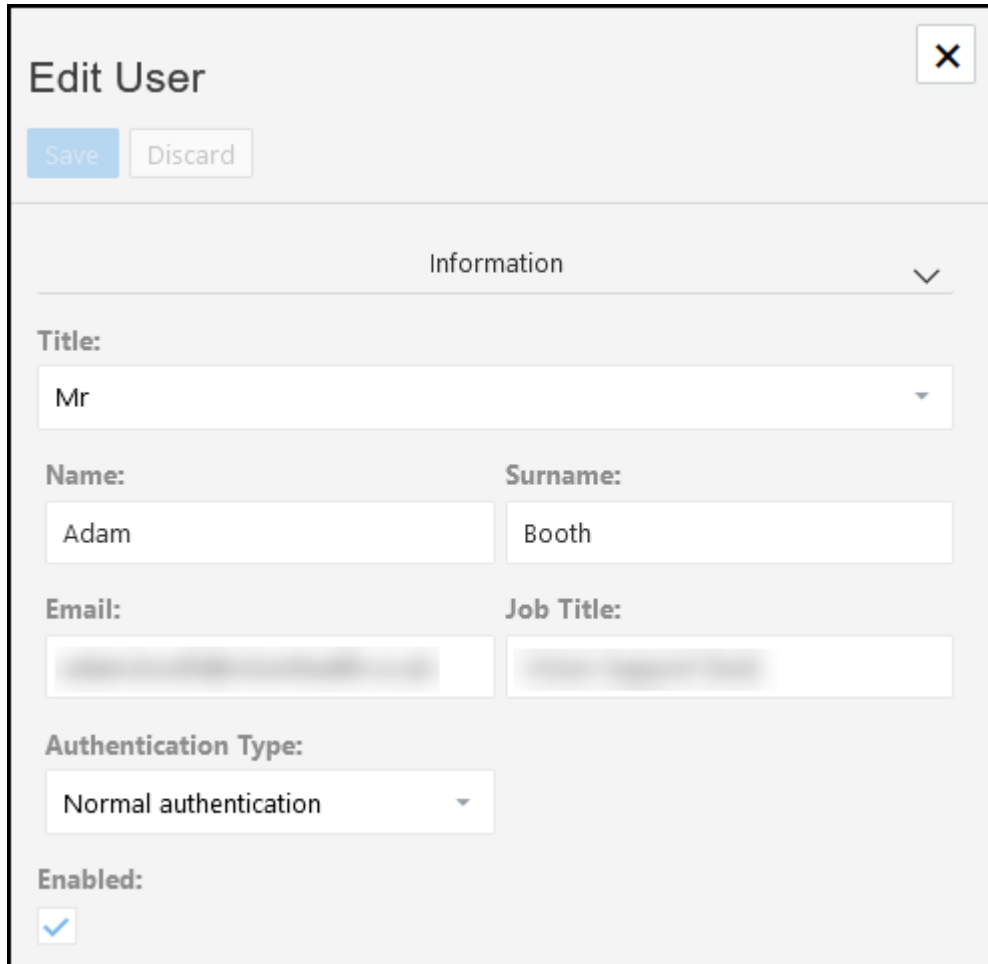
3. Select the **User** you want to edit.

Users					
Name	Username	Job Title	Role	Licences	Status
Andrew Neill	[REDACTED]	Tester	Administrator	10	Enabled
Andrew Nicholls	[REDACTED]	Practice Manager	Standard	10	Enabled
Andrew Ochana	practice.user3@nhs.net	Practice Manager	Administrator	10	Enabled
Andrew Smith	practice.user1@nhs.net	Practice Manager	Administrator	10	Enabled

4. From the toolbar select the **Edit User**.



5. Update **User details** as required:

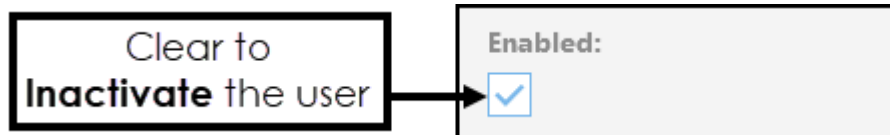
A screenshot of the 'Edit User' form. At the top right is a close button (X). Below the title are 'Save' and 'Discard' buttons. A section header 'Information' is followed by a dropdown arrow. The form contains several fields: 'Title' (dropdown menu with 'Mr' selected), 'Name' (text input with 'Adam'), 'Surname' (text input with 'Booth'), 'Email' (text input, blurred), and 'Job Title' (text input, blurred). Below these is 'Authentication Type' (dropdown menu with 'Normal authentication') and 'Enabled' (checkbox with a checkmark).

- **Title** (Mandatory)
Choose from the drop-down list:
Ms, Miss, Mrs, Mr, Dr or **Prof**.
- **Name** (Mandatory)
- **Surname** (Mandatory)
- **Email Address** (Mandatory)
This must be an email address.
- **Job Title**

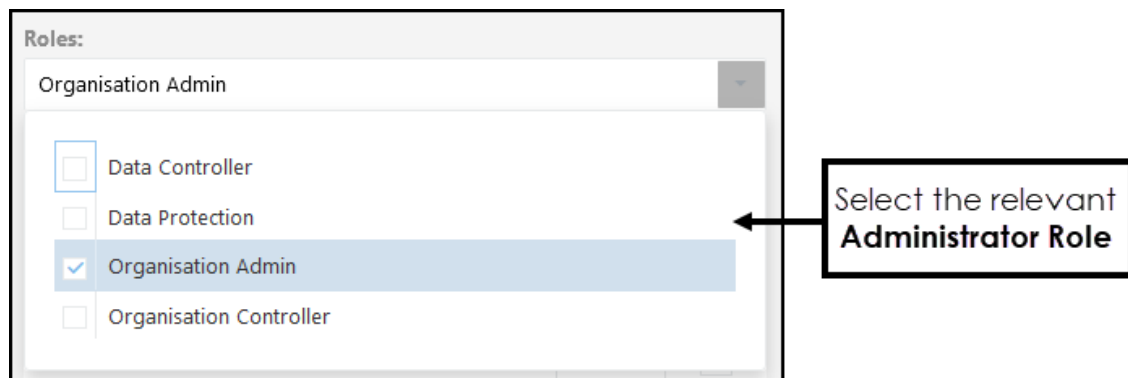
- **Authentication Type** (Mandatory)
Choose from **Normal authentication** or **Two Factor authentication - email** (recommended).
- **Enabled** (selected by default) activates the user account.

Select **Save** to update.

6. To **Inactivate** a user, clear the **Enabled** checkbox.



7. To set the user as an **Administrator**, select the **Is administrator** checkbox.



Alternatively, clear the **Is administrator** checkbox to remove **Administration** rights.

8. To manage **User Licenses**:

Licences:		
Product	Available	Assign
Questionnaires	96	<input checked="" type="checkbox"/>
Vision+	96	<input checked="" type="checkbox"/>
Vision+ - Pathways	96	<input checked="" type="checkbox"/>
Vision+ - QOF	96	<input checked="" type="checkbox"/>
Vision+ - SMS Replies	96	<input checked="" type="checkbox"/>
Vision+ - Warfarin/INR	96	<input checked="" type="checkbox"/>

In the **Licences** section select **Assign** to allocate available product licenses or clear the **Assign** checkbox to revoke a **License**.



Note - Revoked licences can be reallocated to other users.

9. Select **Save** to update.



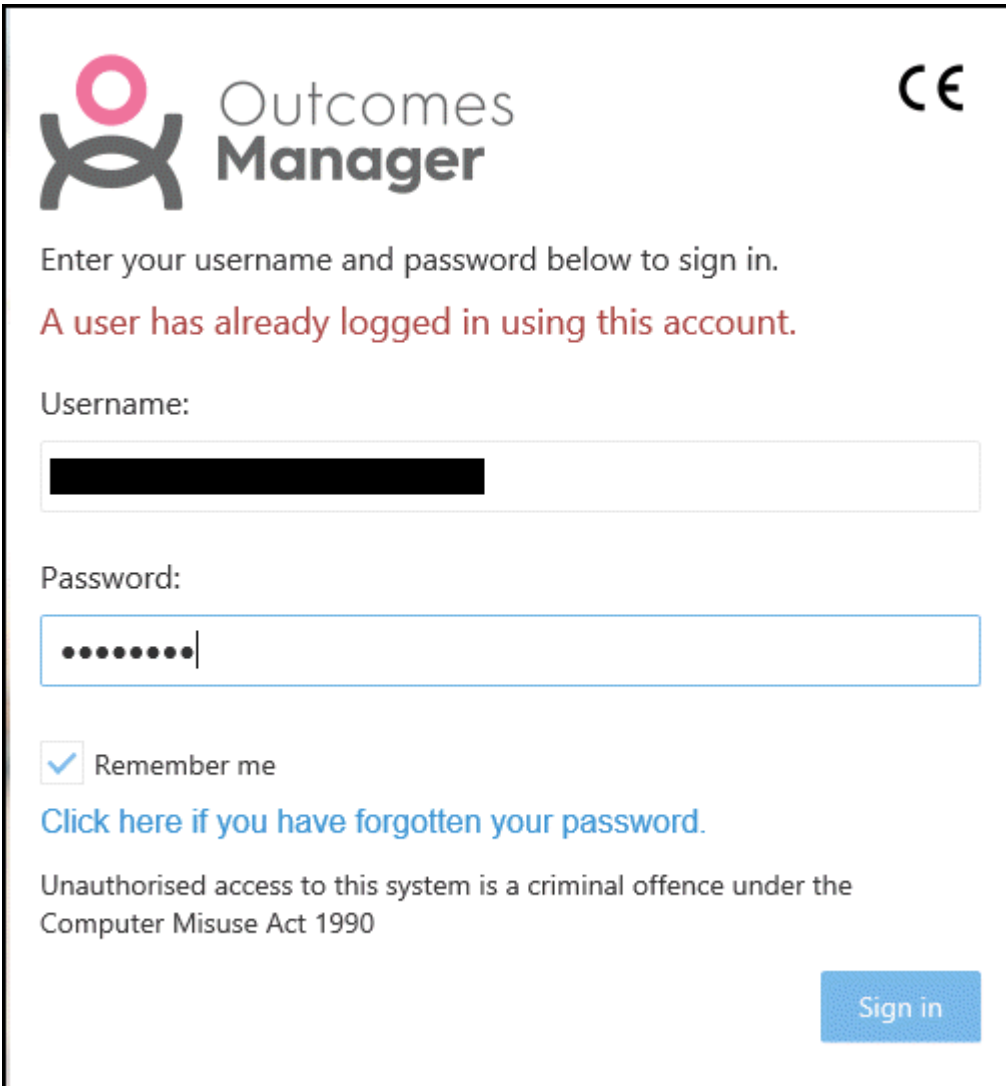
See - [Add User on page 10](#).

Logged in Users

The **Logged in Users** view displays a list of all the staff within your organisation that are currently logged into **Outcomes Manager GP**.

This view can also be used to **Unlock** an account. A staff member can be locked out of their account for several reasons, for example, the user's browser or device may have closed down unexpectedly.

On trying to log back in the error message "A user has already logged in using this account" displays.

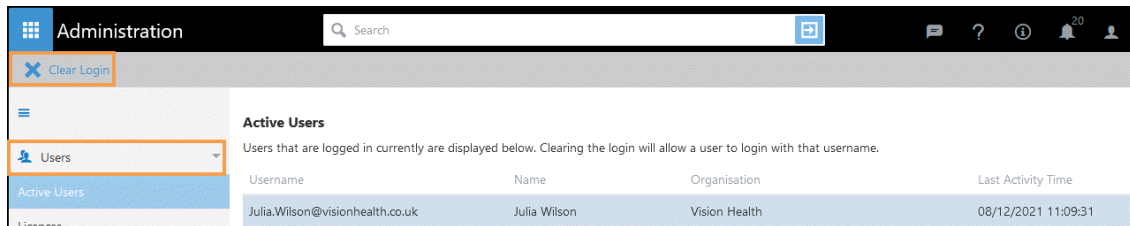


The screenshot shows the Outcomes Manager login interface. At the top left is the Outcomes Manager logo, and at the top right is a CE mark. Below the logo, the text reads: "Enter your username and password below to sign in." A red error message states: "A user has already logged in using this account." There are two input fields: "Username:" with a blacked-out field, and "Password:" with a field containing ten dots. Below the password field is a checked checkbox labeled "Remember me". A blue link says "Click here if you have forgotten your password." At the bottom, a warning states: "Unauthorised access to this system is a criminal offence under the Computer Misuse Act 1990". A blue "Sign in" button is located in the bottom right corner.

The system automatically unlocks the account after 10 minutes. Alternatively, an administrator can release the locked account.

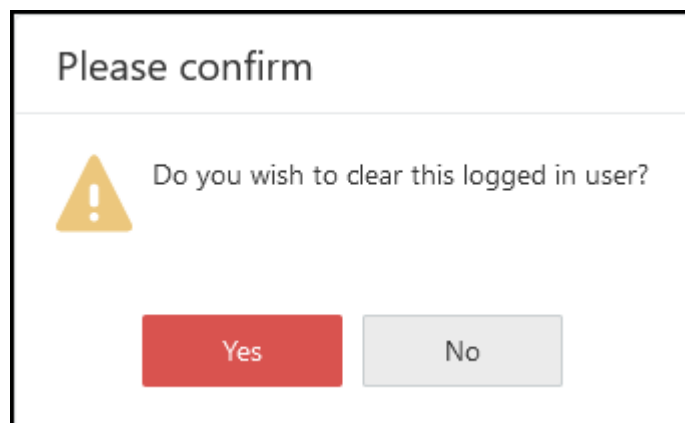
1. From the main **Dashboard** select the **Administration** tile.

A list of **Logged in users** for your organisation displays.



2. Select the locked user and **Clear Login** displays at the upper left of the view.
3. Select **Clear Login**.

An alert displays "Do you wish to clear this logged in user?".



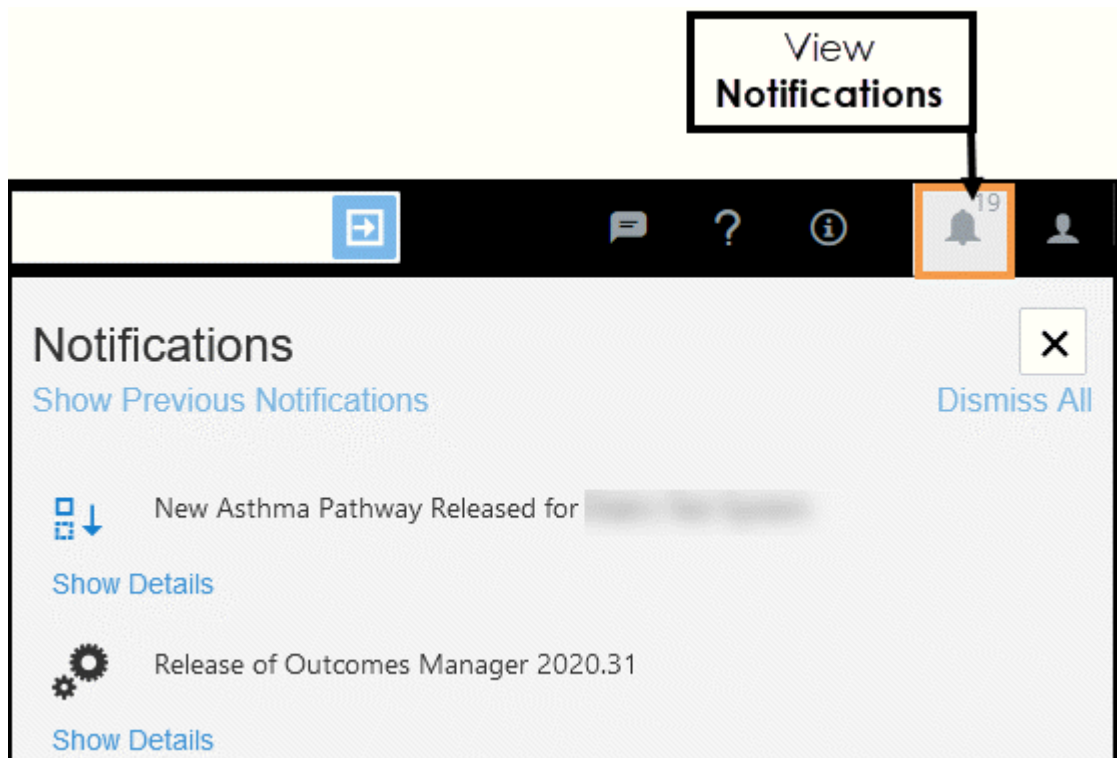
4. Select **Yes** on the confirmation message to delete the lock.
- The user can now log back in.

 See - [User Accounts on page 9](#).

Notifications

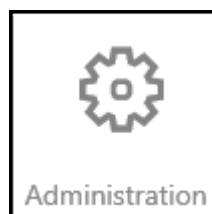
Administrators can create **Notifications**, these display as latest news on the **Outcomes Manager Dashboard**.

For example, a notification of a new pathway.



To create a **Notification**:

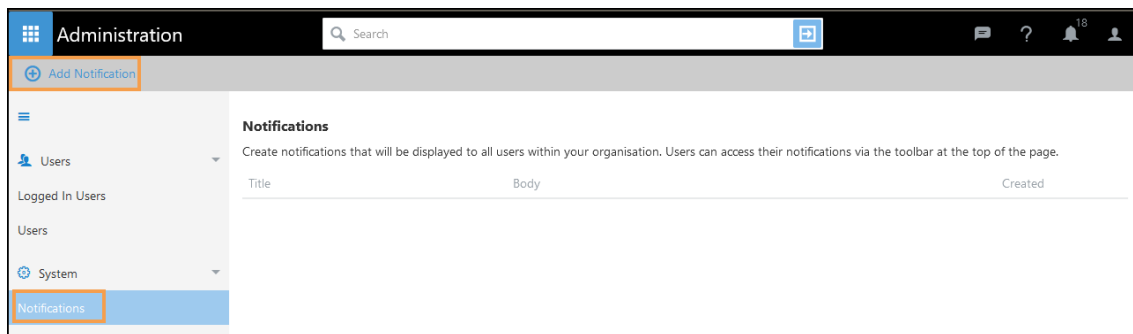
1. From the main **Dashboard** select the **Administration** tile.



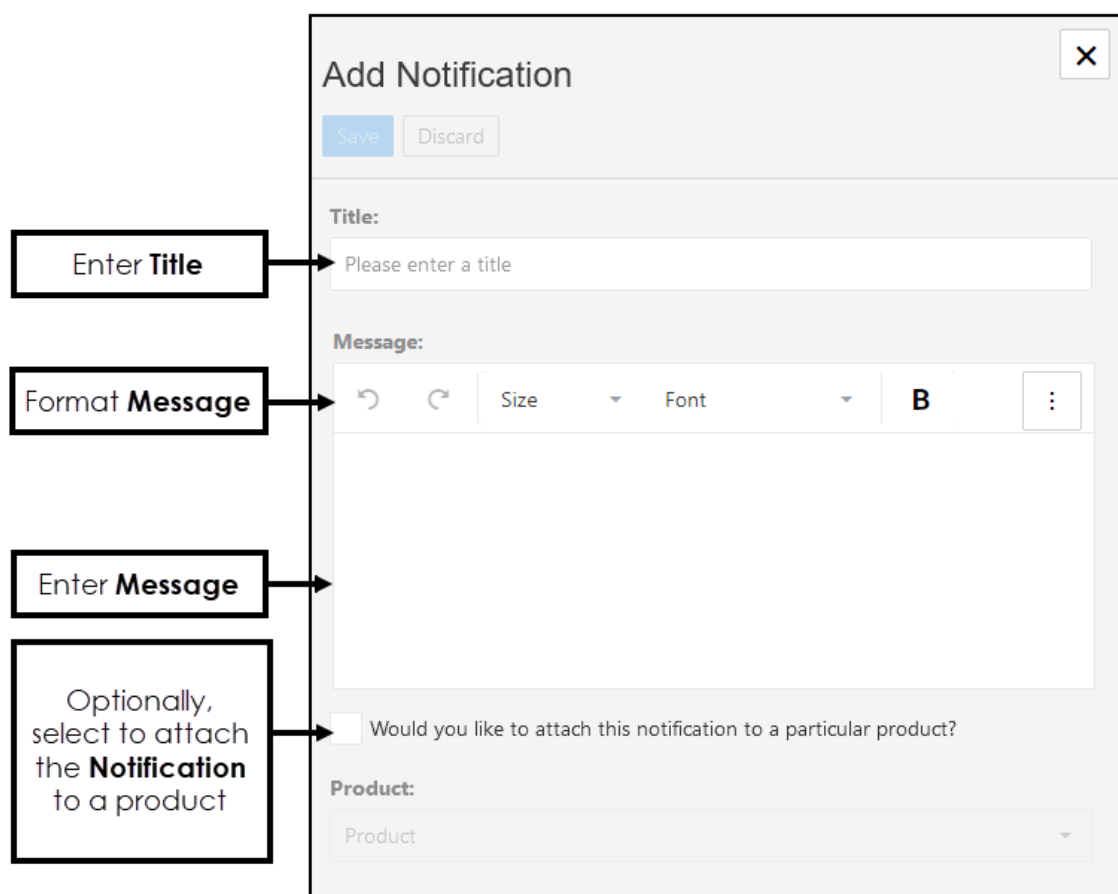
2. Select **System** from the left menu.

- Choose **Notifications** from the drop-down list.

The **Notifications** display.



- Select **Add Notification** from the upper left.



- Enter **Title** and **Message**.
- Optionally, select a **Product** to restrict the notification to users of that product only.

The list of products available is dependent on your organisation.

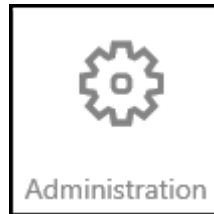
7. Select **Save** to finish.

Users can access their notifications via the toolbar at the top of the **Dash-board**.

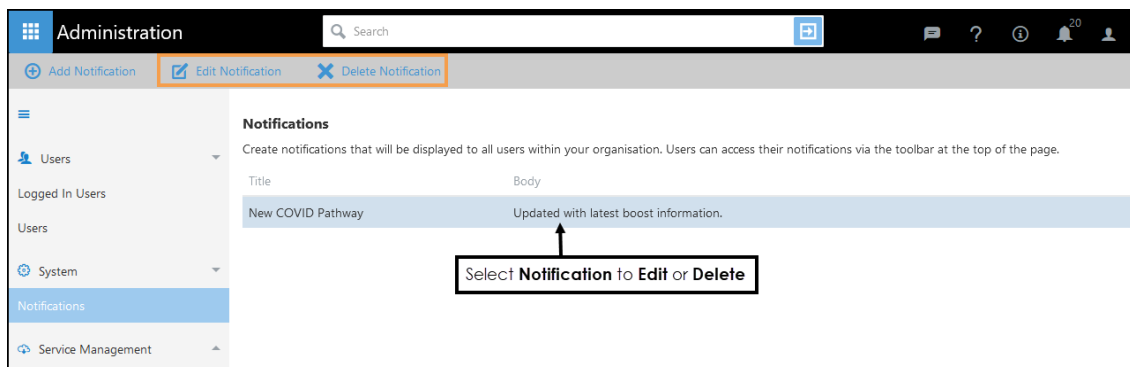
 See - [Edit/Delete Notifications](#).

Edit or Delete Notifications


1. From the main **Dashboard** select the **Administration** tile.



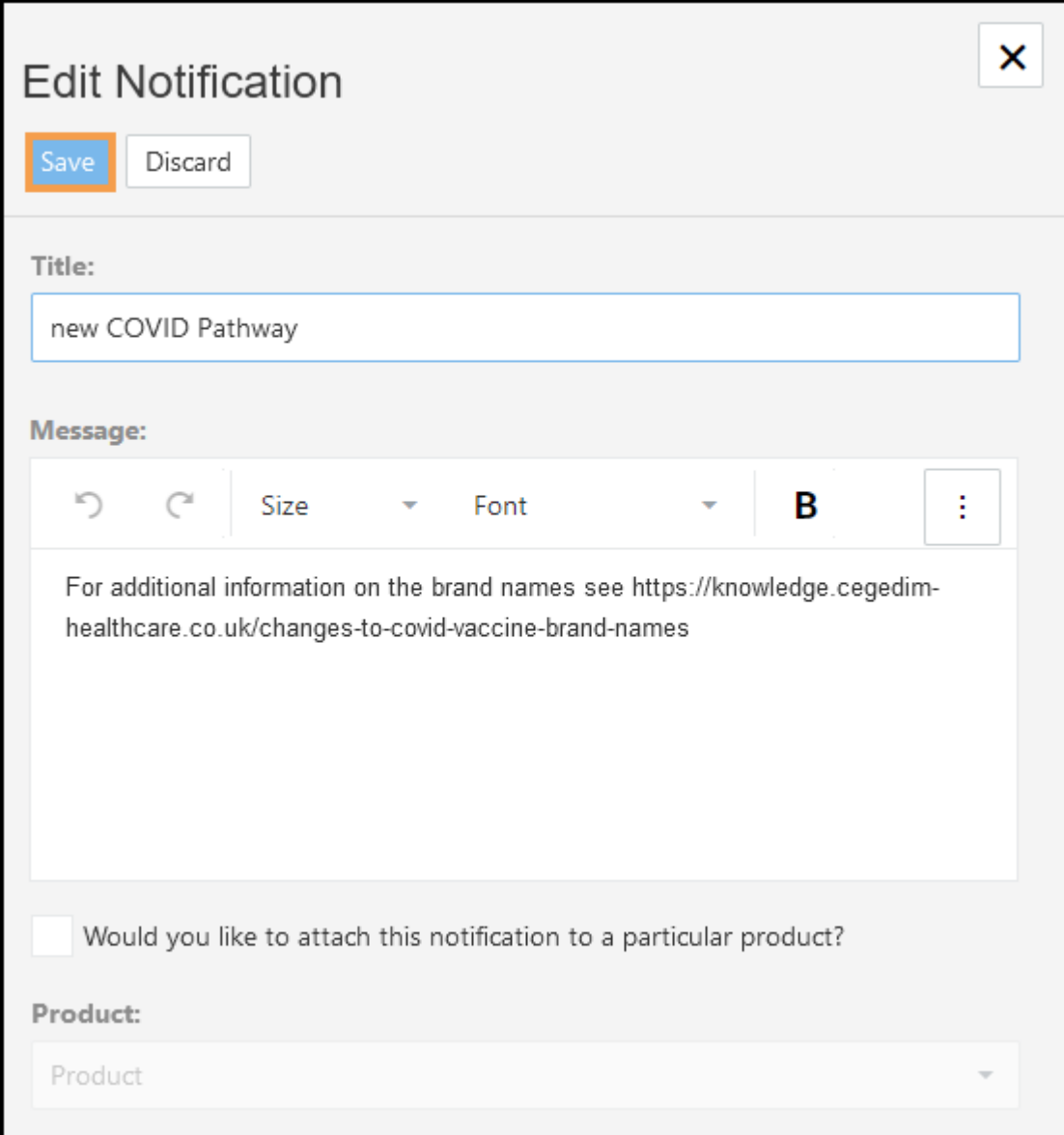
2. Select **System** from the left menu.
3. Select **Notifications** from the drop-down list.
Notifications display.
4. Select the **Notification** you want to **Edit/Delete**.



The **Edit/Delete** options display on the toolbar.

5. Select **Edit Notification**  to make changes.

Update the **Edit Notification** pop-up as required and select **Save**.



Edit Notification ✕

Save **Discard**

Title:

new COVID Pathway

Message:

↶ ↷ Size ▼ Font ▼ **B** ⋮

For additional information on the brand names see <https://knowledge.cegedim-healthcare.co.uk/changes-to-covid-vaccine-brand-names>

Would you like to attach this notification to a particular product?

Product:

Product ▼

6. Or select **Delete Notification**  to remove.

 See - [Notifications on page 20](#).

Patient Consent

Patient Data Sharing Consent authorises **Outcomes Manager** to extract patient identifiable data for trusted organisations.

This produces aggregated data on a dashboard that can be drilled down to show patient details. A practice must opt in for this to occur.

Patient Data Sharing Consent

Please indicate how you want to share your patient identifiable data using the options below. If an organisation is selected, any patient identifiable data will be shared to all extracts within that organisation (unless a patient has explicitly opted out of sharing their data). Please ensure that you carefully read the relevant data sharing agreements for each organisation/extract that you select. Please note, this only affects extracts that are currently distributed to your practice.

- Do not allow patient identifiable data to be shared Allow patient identifiable data to be shared to any organisation
 Allow patient identifiable data to be shared to the selected organisations/extracts

There are three options available:

- **Do not allow patient identifiable data to be shared** (default)
- **Allow patient identifiable data to be shared to any organisation**
Shares data with any organisations your practice has a relationship with.
- **Allow patient identifiable data to be shared to the selected organisations/extracts**
Choose which organisations/extracts you want to share patient identifiable data with.

i **Important** - Regardless of the option selected if a patient's record states they have opted out of record sharing their demographic information is not exported.

Opt out of Sharing Data

To disable data sharing:

1. From the **Home** screen select the **Administration** tile.
2. From the **Administration** menu expand **Service Management**.
3. Select **Patient Data Sharing Consent**.

The **Patient Data Sharing Consent** options display.

4. Select the **Do not allow patient identifiable data to be shared** check box.

Patient Data Sharing Consent

Please indicate how you want to share your patient identifiable data using the options below. If an organisation is selected, any patient identifiable data will be shared organisation (unless a patient has explicitly opted out of sharing their data). Please ensure that you carefully read the relevant data sharing agreements for each organ Please note, this only affects extracts that are currently distributed to your practice.

Do not allow patient identifiable data to be shared Allow patient identifiable data to be shared to any organisation

Allow patient identifiable data to be shared to the selected organisations/extracts

5. Select **Save** from the toolbar.

An alert displays '*Please confirm that you do not allow patient data to be shared? All existing patient data will be removed.*'

Please Confirm...

 Please confirm that you do not allow patient data to be shared? All existing patient data will be removed.

6. Select **Yes** to confirm or **No** to cancel.

Enable Sharing of Data

To enable data sharing with organisations you have a relationship with:

1. From the **Home** screen select the **Administration** tile.
2. From the **Administration** menu expand **Service Management**.
3. Select **Patient Data Sharing Consent**.

The **Patient Data Sharing Consent** options display.

4. Select the **Allow patient identifiable data to be shared to any organisation** check box.

Patient Data Sharing Consent


Please indicate how you want to share your patient identifiable data using the options below. If an organisation is selected, any patient identifiable data will be shared to that organisation (unless a patient has explicitly opted out of sharing their data). Please ensure that you carefully read the relevant data sharing agreements for each organisation. Please note, this only affects extracts that are currently distributed to your practice.

Do not allow patient identifiable data to be shared Allow patient identifiable data to be shared to any organisation
 Allow patient identifiable data to be shared to the selected organisations/extracts

5. Select **Save Consent** from the toolbar.

An alert displays 'Please confirm that you wish to allow patient data to be shared to any extract that requires it?'

Please Confirm...

 Please confirm that you wish to allow patient data to be shared to any extract that requires it?

6. Select **Yes** to confirm or **No** to cancel.

Sharing Patient Identifiable Data with Selected Organisations/Extracts












To manage which **Organisations** or **Extracts** you want to share patient identifiable data with, for example, choose to share data for a specific pathway rather than all pathways for an organisation:

1. From the **Home** screen select the **Administration** file.
2. From the **Administration** menu expand **Service Management**.
3. Select **Patient Data Sharing Consent**.
The **Patient Data Sharing Consent** options display.
4. Select the **Allow patient identifiable data to be shared to the selected organisations/extracts** check box.
The list of **Organisations** and **Extracts** displays.
5. Optionally, to view more information about an extract, select **View Data Sharing Agreement**.
6. To share data for all the extracts belonging to a specific organisation select the check box next to the organisation's name.

Patient Data Sharing Consent

Please indicate how you want to share your patient identifiable data using the options below. If an organisation is selected, any patient identifiable data will be shared to that organisation (unless a patient has explicitly opted out of sharing their data). Please ensure that you carefully read the relevant data sharing agreements for each organisation. Please note, this only affects extracts that are currently distributed to your practice.

Do not allow patient identifiable data to be shared
 Allow patient identifiable data to be shared to any organisation
 Allow patient identifiable data to be shared to the selected organisations/extracts

-  ██████████
 -  1153 - Active Patients Central Report
 -  189 - CKD Manager
 -  Federation 13
 -  1421 - Coronavirus (COVID-19) Management
 -  Federation 22
 -  1421 - Coronavirus (COVID-19) Management
 -  Primis
 -  845 - Primis Test Pathway
 -  ██████████ [View Data Sharing Agreement](#)
 -  747 - Standard medication review NHS ██████████

Select which **Organisations** and **Extracts** you want to share patient data with

Select to **View Data Sharing Agreement**


Note - If you select an organisation, you are automatically sharing data for any future extracts.

See - [Patient Extracts on page 30](#).


- Alternatively, to share data relating to specific extracts only, select the check box next to the extract.
- To remove consent, clear the check box next to the relevant **Organisation/Extract**.
- Review your choices, then select **Save Consent** from the upper left of the screen.

A notification 'Please confirm that you are allowing patient data to be shared to the following organisations/extracts and agree with the associated data agreements' displays.

Please Confirm...

 Please confirm that you are allowing patient data to be shared to the following organisations/extracts and agree with the associated data agreements?

- Select **Yes** to proceed or **No** to cancel changes.

 **Important** - Once you have given consent to share **Patient Identifiable Data**, this only applies to extracts taken after consent. It is not retrospectively applied to any historical extracts.

Patient Extracts

Patients can opt in or out of sharing their identifiable data as part of practice extracts, this is based on entries in their medical record.

Opt In to Data Sharing

The absence of an opt in or out code automatically includes the patient's data in the extract.

The patient's data is also included if the latest consent entry matches either:

Read Codes

- **9Nd7** - Consent given for electronic record sharing
- **9Nu1** - Dissent withdrawn second use of GP patient identifiable data



SNOMED Concepts

- **425691002** - Consent given for electronic record sharing (finding)
- **827261000000102** - Dissent withdrawn for secondary use of general practitioner patient identifiable data (finding)

Opt Out of Data Sharing

The following codes exclude the patient data from the extract:



Read Codes

- **9Nd1** - No consent for elec recor shar
- **9Nu0** - Dis sec use GP pt identif data
- **9NdH** - Dec con shar pt data 3rd party

SNOMED concepts

- **414859005** - No consent for electronic record sharing (finding)
- **827241000000103** - Dissent from secondary use of general practitioner patient identifiable data
- **320011000000108** - Declined consent to share patient data with specified third party (finding)

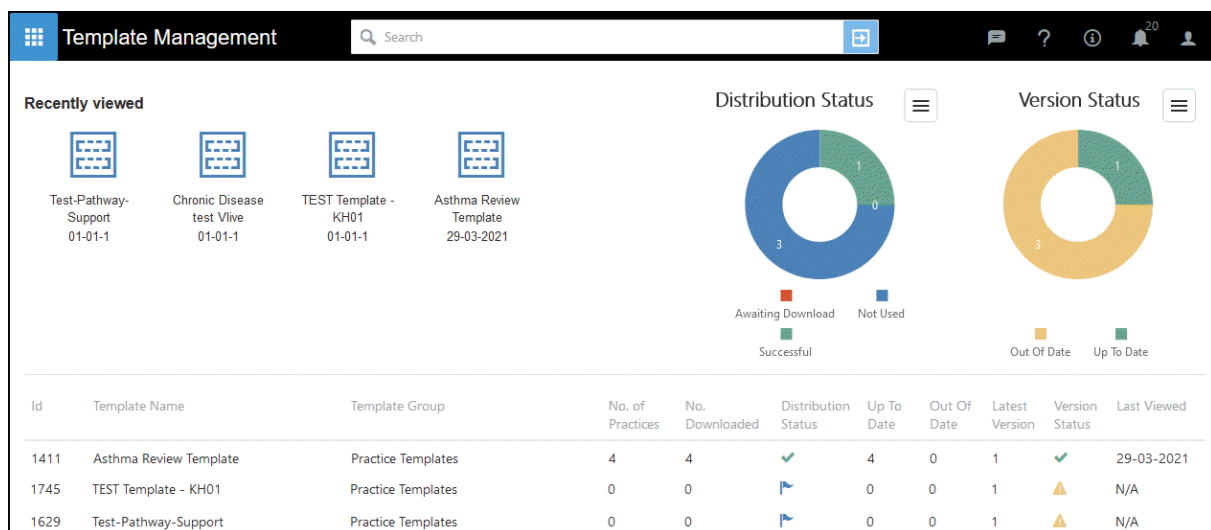
i **Important** - These codes can be superseded by use of the *Dissent withdrawn for secondary data use* code as detailed under Opt In.

Template Management

As a practice you can create templates using **Vision+ Template Designer**, these can then be uploaded and shared to any practice in your country.

To share a template, click [here](#) for full instructions.

The **Template Management** view displays all your shared templates, along with details of usage.



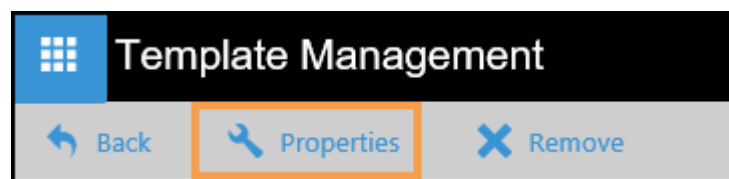
Select a **Template** to access the **Properties**, from here you can provide a description for end users or you can **Remove** the template.

➔ See - [Edit Template Properties on the next page](#) and [Remove Template on page 51](#)

Edit Template Properties

Templates you have shared can include descriptions, these provide practices with information about the content.

1. From the main **Dashboard** select the **Template Management** tile.
2. Select a **Template**, for example, *Anti Coagulation Management*.
The **Template** displays.
3. From the toolbar select **Properties**.

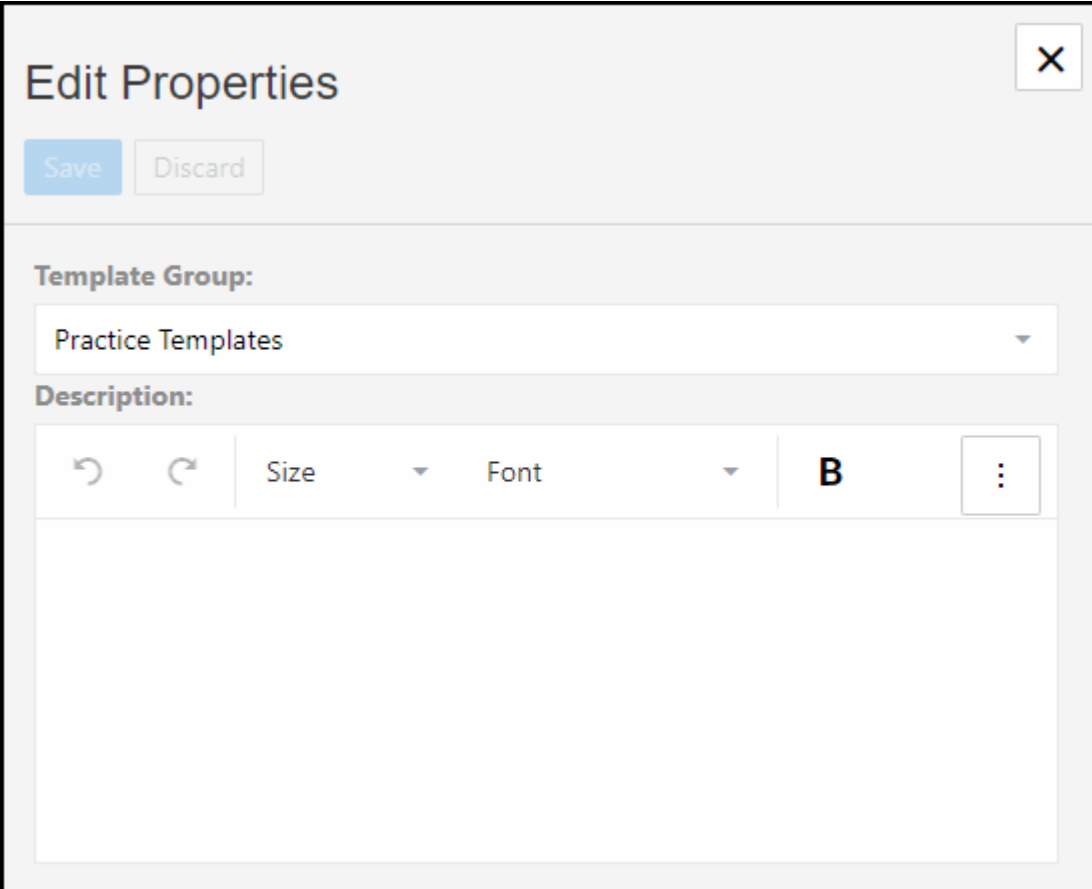


The **Edit Properties** pop-up displays.

4. To change the **Template Group**, select the drop-down arrow and choose from the list.

This is the **Template Category** heading in the clinical system's **Download Web Files** section.

5. **Add/Edit** the description.



For further formatting choices select **Options** .

See - [Formatting on the next page](#) for more information.

6. Select **Save** to update.

This information displays to users in the **Available Templates** view.

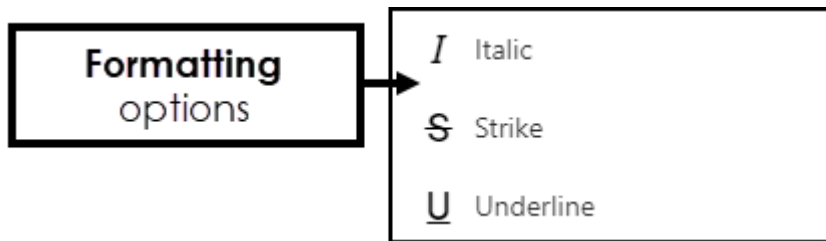
See - [Available Templates on page 44](#).

Formatting

Select **Options**  to format the message:

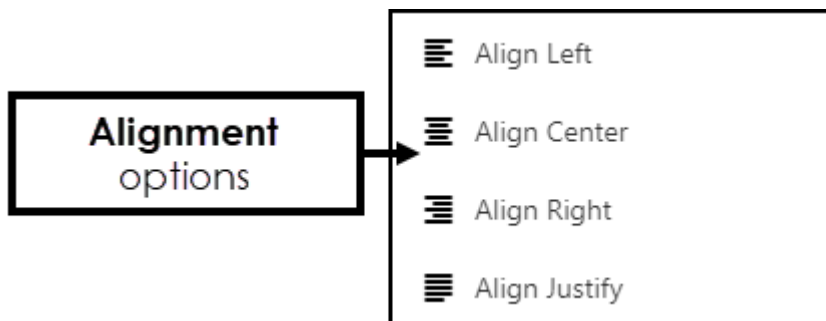
Text Formatting Options

1. Select the **Text** you want to format.
2. Choose from **Italic**, **Strike** or **Underline**.



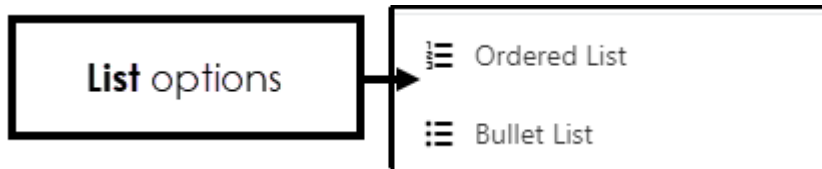
Alignment Options

1. Select the **Text** you want to align.
2. Choose from **Align Left**, **Align Centre**, **Align Right**, and **Align Justify**.



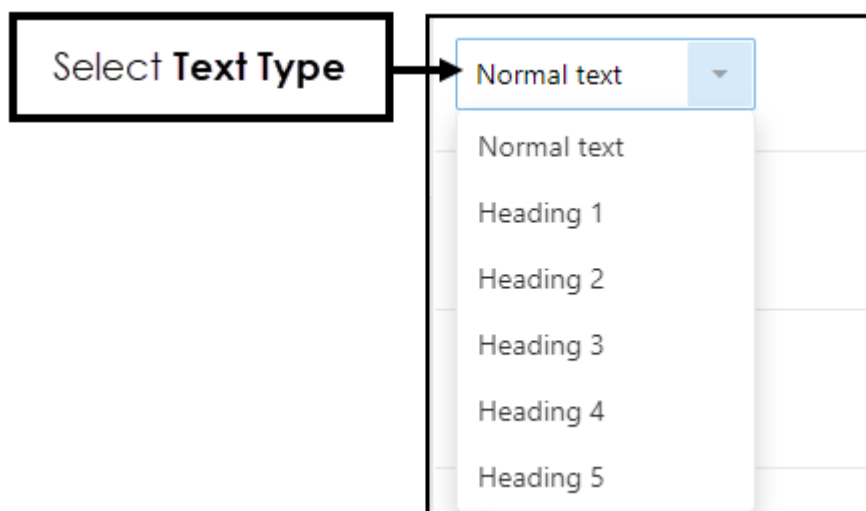
List Options

1. Select the **Paragraph** you want to format as a list.
2. Choose from **Ordered List** (numeric) or **Bullet List**.



Text type

1. Select the **Text** you want to format.
2. Select **Normal text** to access the drop-down list.
3. Choose from **Heading 1**, **Heading 2**, **Heading 3**, **Heading 4**, **Heading 5** or **Normal text**.



Colour Options

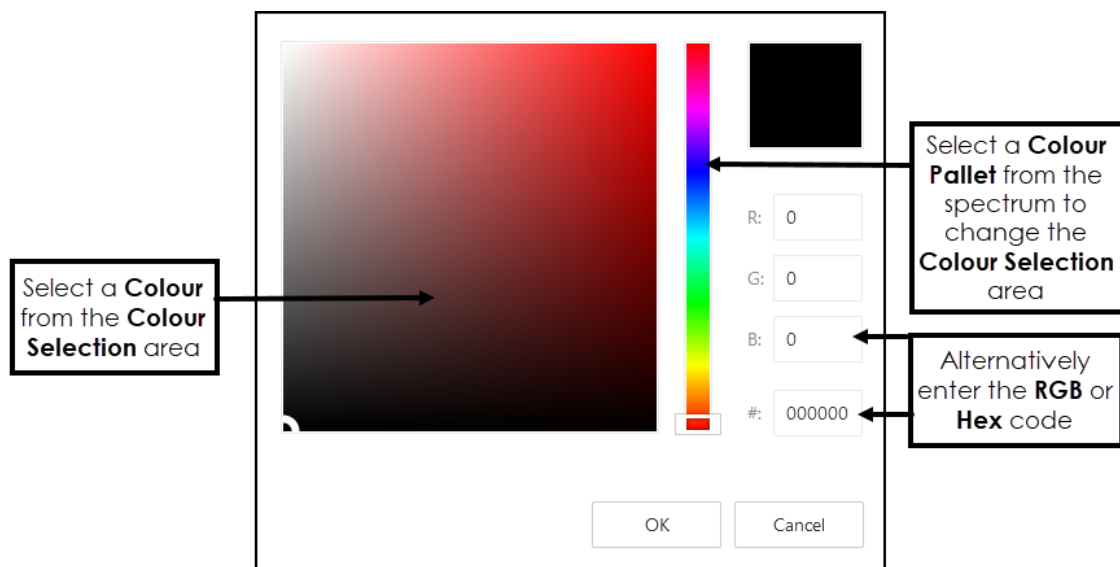
Change the Text colour:

1. Highlight the text.

2. Select **Font Colour**  Font Color

3. Select from the **Colour Selection** area, to change the available colours select from the **Colour Pallet** on the right.

Alternatively, enter the **RGB** or **Hex** code directly.



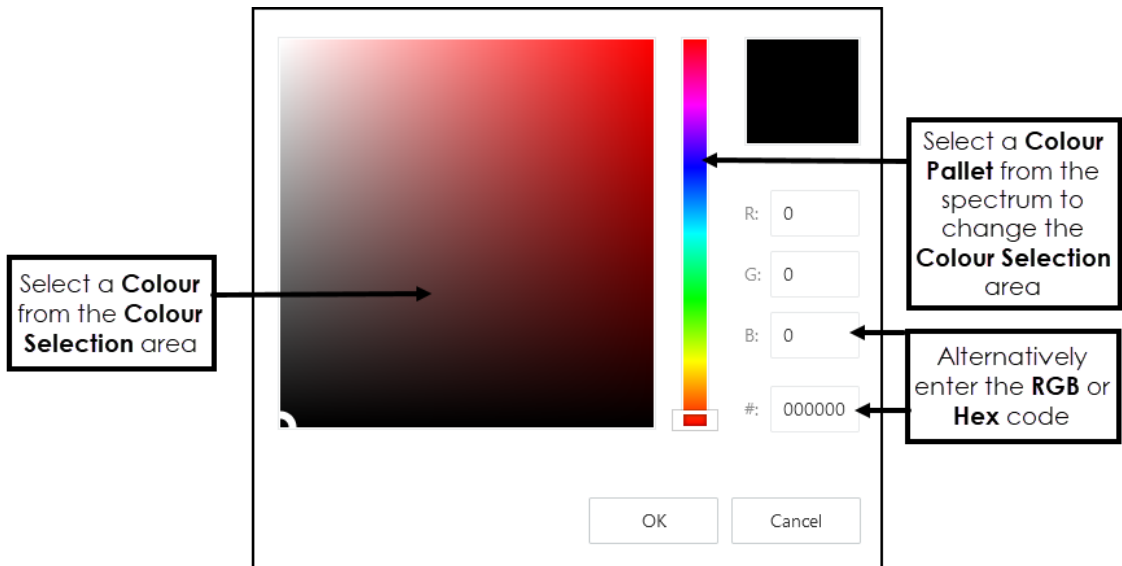
4. Select **Ok**.

Change the Background Colour

1. Select **Background**  Background Color

2. Select from the **Colour Selection** area, to change the available colours select from the **Colour Pallet** on the right.

Alternatively, enter the **RGB** or **Hex** code directly.

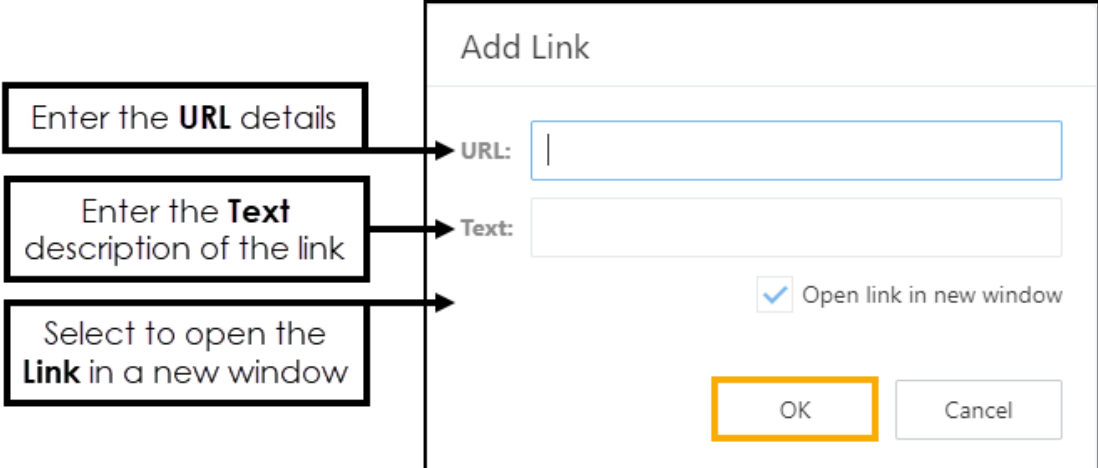


3. Select **Ok**.

Insert Options

Insert Link

1. Select **Link** .
2. Enter the **URL** details.



The screenshot shows the 'Add Link' dialog box with three callout boxes on the left pointing to specific fields:

- Callout 1: "Enter the **URL** details" points to the "URL:" text input field.
- Callout 2: "Enter the **Text** description of the link" points to the "Text:" text input field.
- Callout 3: "Select to open the **Link** in a new window" points to the "Open link in new window" checkbox, which is checked.

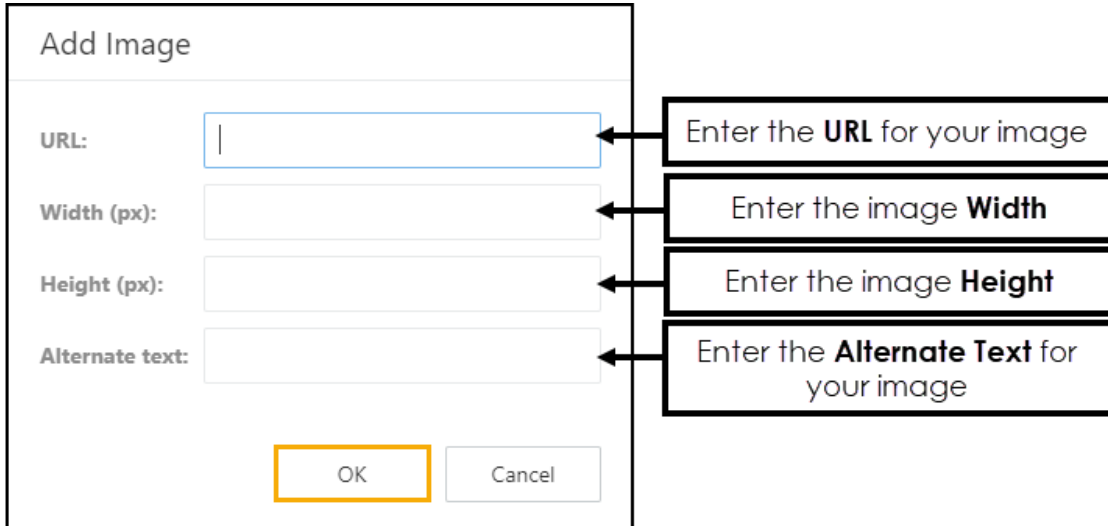
The dialog box contains the following elements:

- Title: Add Link
- URL: [Text input field]
- Text: [Text input field]
- Open link in new window
- OK button (highlighted with a yellow border)
- Cancel button

3. Enter the **Text** description of the **URL**.
4. Select the **Open Link in new window** checkbox, to display the link in a new window.
5. Select **OK** to save.

Insert Image

1. Select **Add Image** .
2. Enter the **URL** location of your image.



The screenshot shows a dialog box titled "Add Image" with the following fields and callouts:

- URL:** A text input field with a callout: "Enter the **URL** for your image".
- Width (px):** A text input field with a callout: "Enter the image **Width**".
- Height (px):** A text input field with a callout: "Enter the image **Height**".
- Alternate text:** A text input field with a callout: "Enter the **Alternate Text** for your image".

At the bottom of the dialog box are two buttons: "OK" (highlighted with a yellow border) and "Cancel".

3. Enter the image **Width (px)**.
4. Enter the Image **Height (px)**.
5. Enter the **Alternate Text** for your image.
6. Select **Ok** to Save.

Developer Options

- **Clear Formatting**

Select the **Code Block** or **Blockquote** you want to remove, and select **Clear Formatting** to delete.

- **Code Block**

Select **Code Block** to toggle the application of a **Code Block** element, you can then copy and paste code into this item.

- **Blockquote**

Select **Blockquote** to toggle the application of a **Blockquote** indentation element to the selected item.

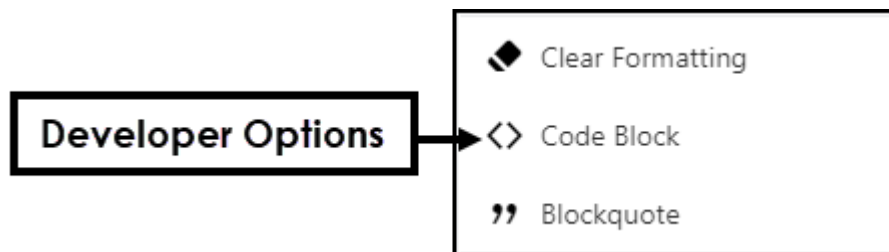



Table Options

Insert Table

1. Select the location for your **Table**.
2. Select **Insert Table**  from the toolbar.
3. In the **Insert Table** pop-up, enter the number of **Rows** and **Columns** required.



Insert Table

Rows:

Columns:

OK Cancel

4. Select **OK**.
The **Table** displays.

Deleting/Editing Tables

- **Delete Table**

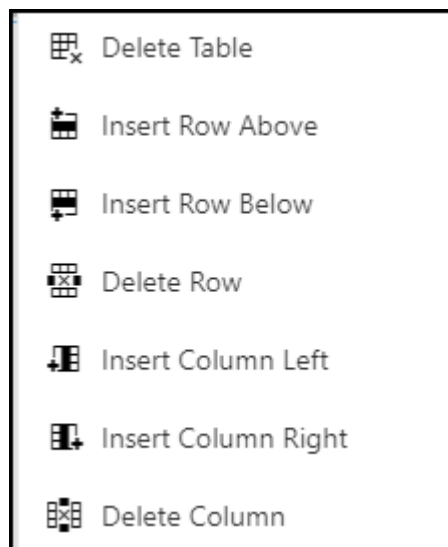
Select the **Table** you want to delete, and select **Delete Table**.

- **Manage Rows**

Select the location of the **Row**, and choose either **Insert Row Above**, **Insert Row Below** or **Delete Row**.

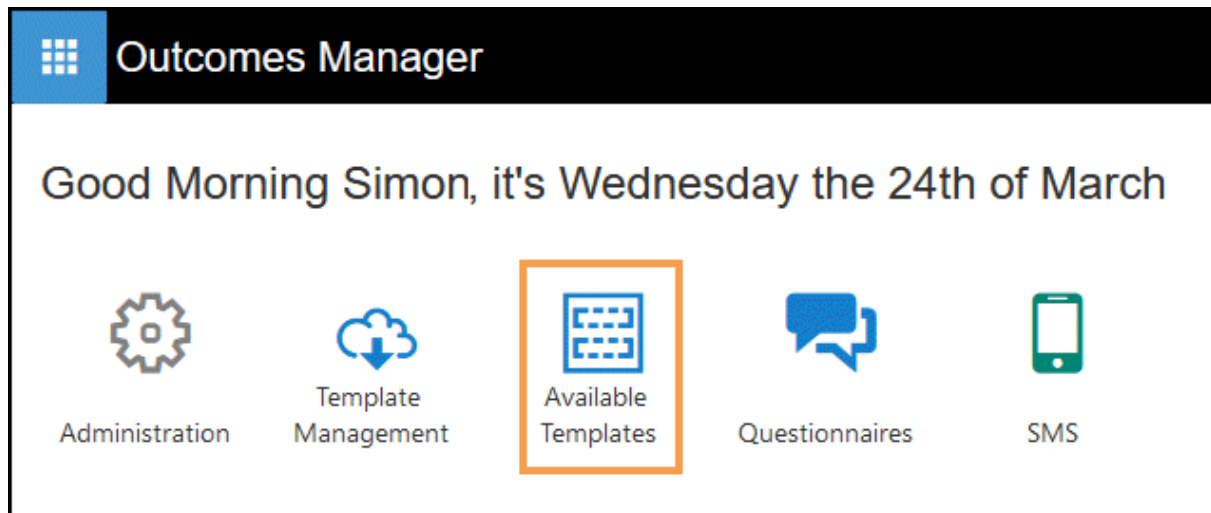
- **Manage Columns**

Select the location of the **Column**, and choose either **Insert Column Left**, **Insert Column Right** or **Delete Column**.



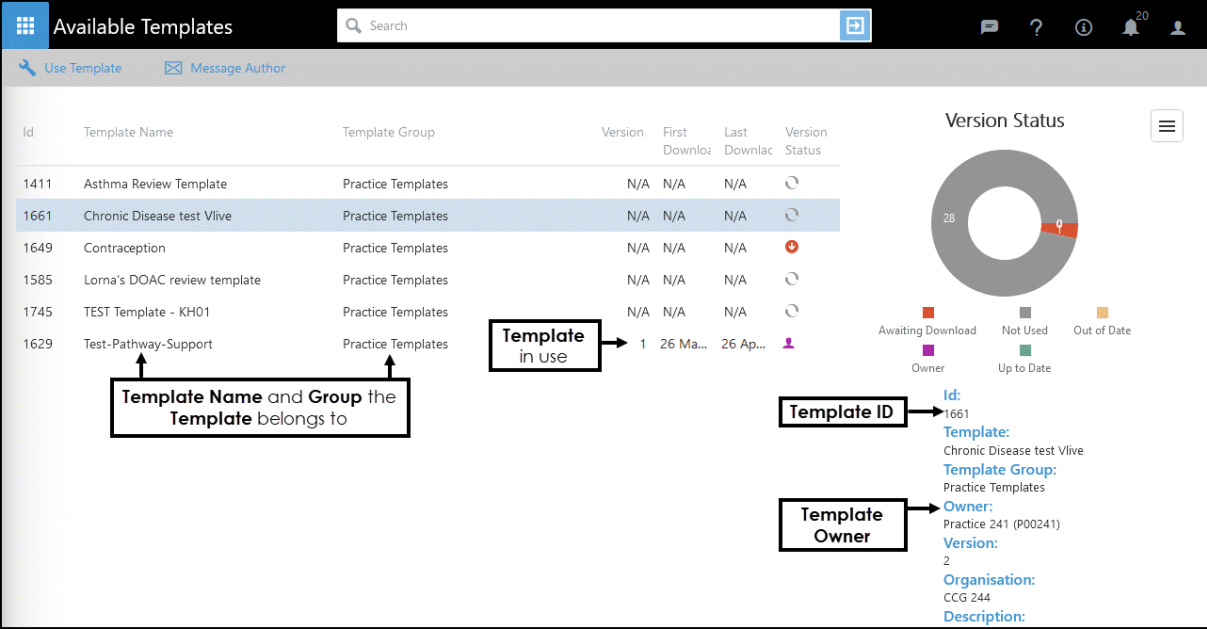
Available Templates

The **Available Templates Dashboard** enables you to browse **Templates** and manage these for use in your practice.



 **Note** - Modules available may vary by practice.

The **Templates** can be from other practices in your country, along with templates designed by organisations, for example, Health Boards or ICBs.



The screenshot shows the "Available Templates" dashboard. It features a table of templates and a "Version Status" donut chart. Annotations explain the table columns and the version status details.

Id	Template Name	Template Group	Version	First Download	Last Download	Version Status
1411	Asthma Review Template	Practice Templates	N/A	N/A	N/A	Up to Date
1661	Chronic Disease test Vlive	Practice Templates	N/A	N/A	N/A	Up to Date
1649	Contraception	Practice Templates	N/A	N/A	N/A	Out of Date
1585	Lorna's DOAC review template	Practice Templates	N/A	N/A	N/A	Up to Date
1745	TEST Template - KH01	Practice Templates	N/A	N/A	N/A	Up to Date
1629	Test-Pathway-Support	Practice Templates	1	26 Ma...	26 Ap...	Owner

Version Status Donut Chart Data:

- Awaiting Download: 28
- Not Used: 0
- Out of Date: 0
- Owner: 0
- Up to Date: 0

Annotations:

- Template Name and Group the Template belongs to:** Points to the "Template Name" and "Template Group" columns.
- Template ID:** Points to the "Id" column.
- Template Owner:** Points to the "Version Status" column.

Version Status Details (for ID 1661):

- Id:** 1661
- Template:** Chronic Disease test Vlive
- Template Group:** Practice Templates
- Owner:** Practice 241 (P00241)
- Version:** 2
- Organisation:** CCG 244
- Description:** (empty)

The dashboard details each available template's name and version number along with the current status:

 **Awaiting Download**

Templates selected for use and awaiting download in your clinical system.

 **Not Used**

Template available for download.

 **Out of Date**

Templates that are out of date and no longer in use.

 **Owner**

Template that your practice has created.

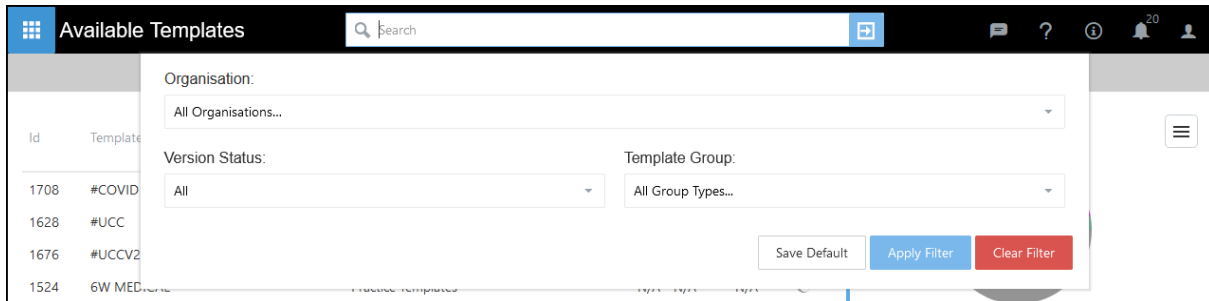
 **Up to Date**

Template already in use at your practice.

 See - [Download Templates on page 48](#) and [Message Author on page 50](#).

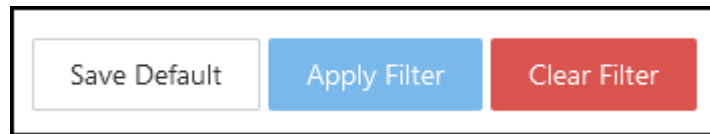
Searching for a Template

There are multiple **Filters** you can apply when searching for a **Template**.



- Organisation**
 Select the drop-down to choose a specific **Organisation** or view **All Organisations** (default).
- Version Status**
 The **Status** of the **Template**:
All - All templates
Awaiting Download - Templates you have requested to download
Not Used - The template has never been downloaded
Out of Date - A template is classified as out of date if a new version has been uploaded by the owner and your practice has not downloaded it yet
Owner - Filter templates you have created
Up to Date - The template is on the latest version
- Template Group**
 Select the drop-down to choose from **All Group Types** or **Practice Templates**.
 The **Template Group** is defined in the **Properties**, therefore, other **Groups** for example **National Programs** or **SIGN Templates** may display.

Using Filters



1. Select the appropriate **Filters**.

For example, a **Version Status** of **Not Used**.

2. Select **Apply Filter**.

The results display.

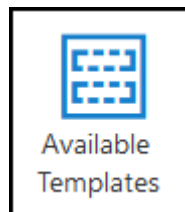
Id	Template Name	Template Group	Version	First Download	Last Download	Version Status
1708	#COVID ES (Adferiad)	Practice Templates	N/A	N/A	N/A	🔄
1628	#UCC	Practice Templates	N/A	N/A	N/A	🔄
1676	#UCCV2	Practice Templates	N/A	N/A	N/A	🔄
1524	6W MEDICAL	Practice Templates	N/A	N/A	N/A	🔄

3. If you are an **Administrator**, you can select **Save Default** to save the **Filter** as a default for your **Organisation**.
4. To remove an active **Filter**, select **Clear Filter**.






Download Templates

To select and download a **Template** to your clinical system:

1. From **Outcomes Manager GP** select **Available Templates**.

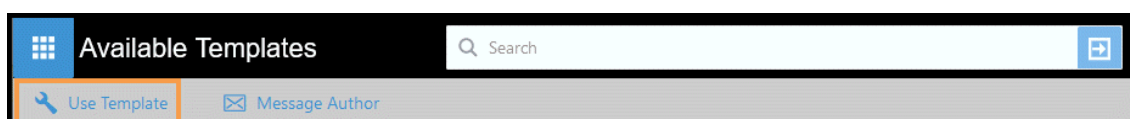


A list of **Templates** displays with the **Version status** to the right of the **Template** details.

-  - **Awaiting Download**
Template already selected and awaiting download in your clinical system.
-  - **Not Used**
Template available for selection.
-  - **Out of Date**
Template out of date and no longer in use.
-  - **Owner**
Template that your practice has created.
-  - **Up to Date**
Template already in use at your practice.

2. Select a **Template**.


Use Template displays below the toolbar.



3. Select **Use Template** from the toolbar.

A **Disclaimer** displays.

Use Template

 These templates have not been reviewed or clinically validated by Vision, and Vision accepts no responsibility for accuracy or safety. Please ensure you review the template before using in clinical practice to ensure you are satisfied with the safety of any content.

Do you accept the terms of this disclaimer?

4. Select **Use Template** to proceed or **No** to cancel.

The **Dashboard** refreshes and the **Template Status** updates to **Awaiting**

Download .

5. Sign into **Vision**, and download the **Templates** as normal.

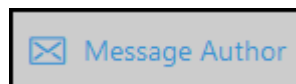
For full instructions [click here](#).

 See - [Available Templates on page 44](#) and [Message Author on the facing page](#).

Message Author

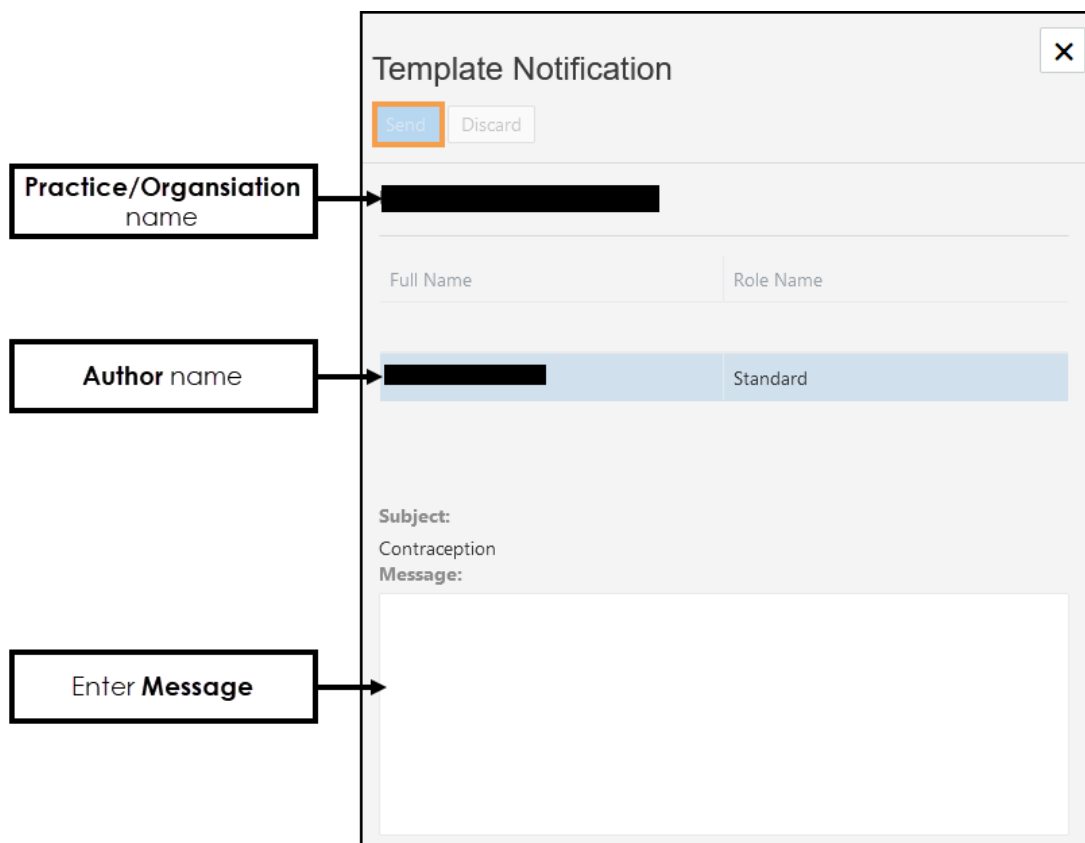
This enables you to send a message to the **Author** of a **Template**.

1. From the **Available Templates** view, select a **Template**.
2. Select **Message Author** from the toolbar.



A pop-up message displays on the right.

3. Enter your message.


 A screenshot of a "Template Notification" pop-up window. The window has a title bar with a close button (X). Below the title bar are two buttons: "Send" (highlighted with an orange border) and "Discard". The form contains several fields:

- A field for "Practice/Organisation name" with a blacked-out value, indicated by an arrow from a label box on the left.
- A table with two columns: "Full Name" and "Role Name". The "Full Name" cell contains a blacked-out value, indicated by an arrow from a label box on the left. The "Role Name" cell contains the text "Standard".
- A "Subject:" field containing the text "Contraception".
- A "Message:" field with a large empty text area below it, indicated by an arrow from a label box on the left that says "Enter Message".

4. Select **Send**.

This generates a **Notification** to the **Author**, and an email alert to let them know they have a new notification. The recipient can respond to the **Notification**, their reply displays in your **Notifications**.

 See - [Available Templates on page 44](#) and [Download Templates on page 48](#).

Remove Template

If you decide you no longer want to share a **Template**, this can be removed.

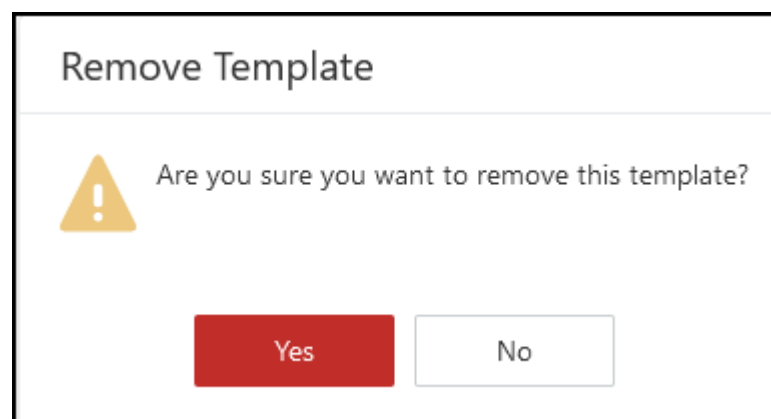
1. From the **Dashboard** select **Template Management**.

2. Select the **Template** from the list.

The **Template** displays.

3. From the toolbar in the upper left, select **Remove**.

An alert displays "Are you sure you want to remove this template?".



4. Select **Yes** to proceed.

The **Template Management** view refreshes.

However, practices need to remove this from **Download Web Files**. A notification 'Obsolete - please delete' displays next to the **Template** to alert the practice.

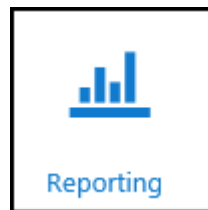
1435 England QOF	Obsolete - please delete	<input type="checkbox"/>	<input checked="" type="checkbox"/>	4	4
------------------	--------------------------	--------------------------	-------------------------------------	---	---

Viewing Extracted Data

The **Reporting Dashboard** enables you to view data from your practice that has been extracted and uploaded to the appropriate organisation.

To view your practice's data:

1. From the **Dashboard** select **Reporting**.

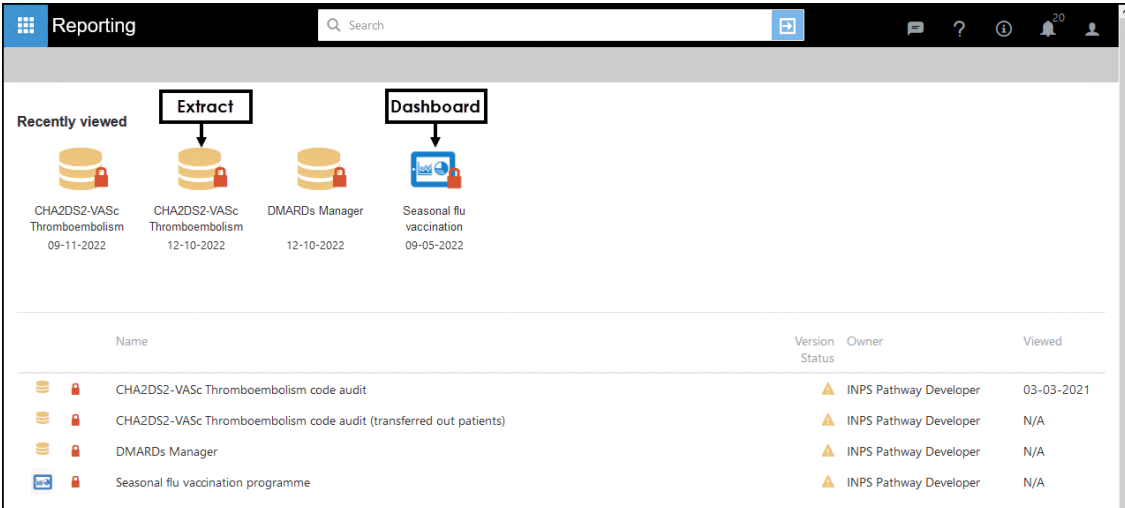










2. Select the **Report** containing the data you want to view.



Note - The **Reporting Dashboard** displays the last five **Extracts/Dashboards** viewed.

Or use the **Search** bar to apply a filter. See - [Filters on page 54](#).



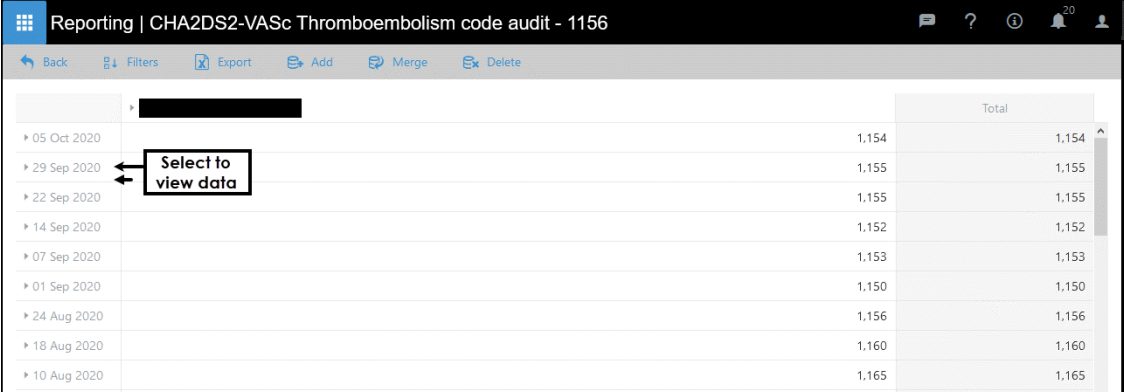
Name	Version Status	Owner	Viewed
 CHA2DS2-VASc Thromboembolism code audit		INPS Pathway Developer	03-03-2021
 CHA2DS2-VASc Thromboembolism code audit (transferred out patients)		INPS Pathway Developer	N/A
 DMARDs Manager		INPS Pathway Developer	N/A
 Seasonal flu vaccination programme		INPS Pathway Developer	N/A

The **View data** screen displays



Note - The **Dashboards** refresh once a day.

3. Select a **Date** to view data.



Reporting | CHA2DS2-VASc Thromboembolism code audit - 1156

Back Filters Export Add Merge Delete

	Total
05 Oct 2020	1,154
29 Sep 2020	1,155
22 Sep 2020	1,155
14 Sep 2020	1,152
07 Sep 2020	1,153
01 Sep 2020	1,150
24 Aug 2020	1,156
18 Aug 2020	1,160
10 Aug 2020	1,165

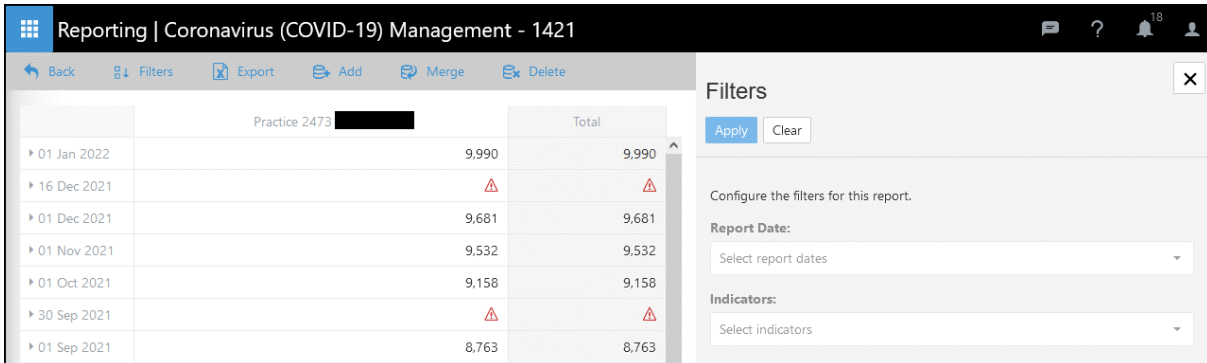
You can also **Filter** and **Export** the data.

- [Filters on the facing page](#)
- [Export Data](#)

Filters

The **Filters** function in **Reporting** enables you to **Filter** by:

- **Report Date**
- **Indicators (report lines)**



The screenshot shows the Reporting interface for 'Coronavirus (COVID-19) Management - 1421'. The main table displays data for 'Practice 2473' with columns for dates, values, and a 'Total' column. The 'Filters' pop-up is open on the right, allowing users to configure filters for the report. The pop-up includes an 'Apply' button and a 'Clear' button. The 'Report Date' section has a dropdown menu labeled 'Select report dates'. The 'Indicators' section has a dropdown menu labeled 'Select indicators'.

	Practice 2473	Total
01 Jan 2022	9,990	9,990
16 Dec 2021	9,681	9,681
01 Dec 2021	9,532	9,532
01 Nov 2021	9,158	9,158
01 Oct 2021	8,763	8,763
30 Sep 2021		
01 Sep 2021		

Apply Filters

1. Select **Filters**.

The **Filters** pop-up displays on the right of your screen.

2. Select from the drop-down lists to **Filter** your reports as required:

- **Report Date**
Choose from the list of dates, press CTRL to select multiple lines.
- **Indicators**
These are the individual report lines, you can select a single line or press CTRL to select multiple lines.

3. Select **Apply** and **X** to close the pop-up.

The report screen refreshes.


4. To revert to the original view, open the **Filters** view and select **Clear**.



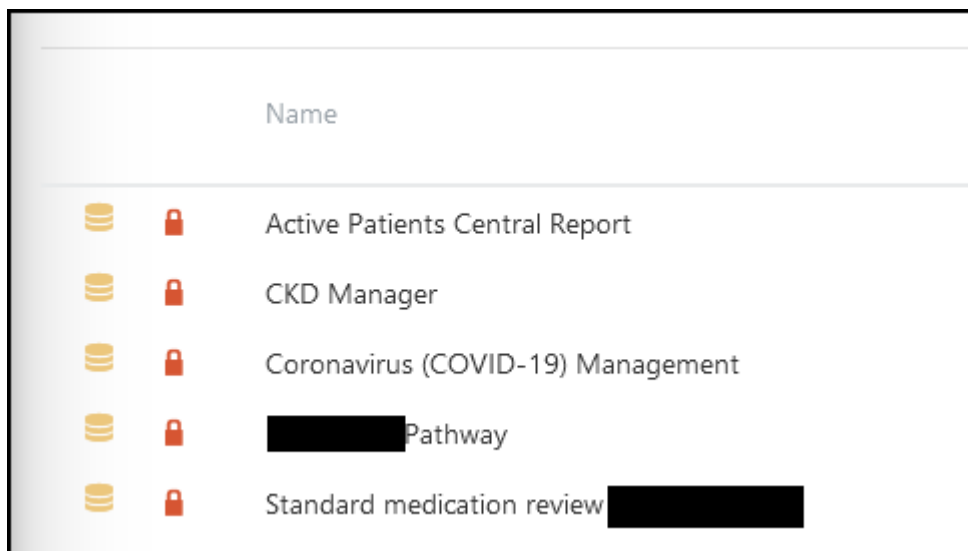
See - [Viewing Extracted Data on page 52](#).

Export Data

When viewing **Reporting Extracts** data can be exported into a spreadsheet, for example, Excel.

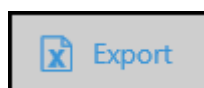
 **Note** - This function exports data exactly how it currently displays. Therefore, if you want to include additional details, expand each of the report lines required.

1. Open the **Reporting** view.
2. Select your **Extract** from the list.



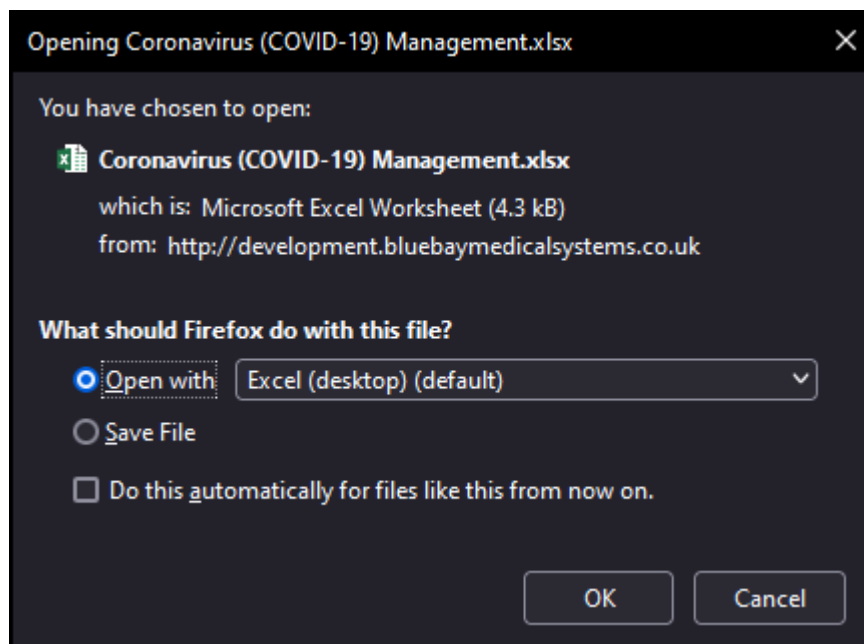
The **Extract** displays

3. Optionally, apply any **Filters** as required.
See - [Filters](#).
4. Expand any reporting lines required.
5. Once you have the view of the required data, select **Export**.



A notification displays within your browser with the options to display or save the file.

6. Choose the appropriate option and select **OK**.



Reporting - Add Data

You can manually add data to your report, for example, following a failed extract.

To **Add Data**:

1. From the **Reporting Dashboard** select your report.
The **Report** displays.
2. From the toolbar select **Add**.



The **Add Manual Data** pop-up displays on the right.

3. Select your practice from the drop-down list.

Add Manual Data
✕

Save
Discard

Practice

Select a practice...
▼

Report Date

Select a report date...
▼

Indicator	Patient Count
Suspected disease caused by 2019-nCoV (novel coronavirus) i...	0
Patient with vulnerable condition(s)	0
On Shielded Patient List (9d44 (443999008) - centrally added)	0
Vulnerable: Works in Care home	0
On Shielded Patient List (65Z.(77248004) - locally added)	0
Vulnerable: Patient pregnant	0
Solid organ transplant recipient - NOT on SPL	0
Vulnerable: Is a Carer	0
Solid organ transplant recipient - On SPL	0
Influenza-like symptoms (3m) with exposure to confirmed case	0
Cancers of blood or bone marrow (from 1/4/2015) - On SPL	0

Select your practice from the list

Select **Report Date**

Manually enter data for the appropriate line

4. Select the **Report Date** from the drop-down list.
5. Enter the data for the appropriate **Indicator**.
6. Select **Save** to update.
A message displays "*Successfully saved manual data!*"
7. Select **X** to close.

Questionnaires

Questionnaires are created centrally and automatically distributed web-based documents.

They can be defined to be completed within certain time frames, and then submitted to provide data that can be viewed centrally.

Questionnaires fall into the following categories:

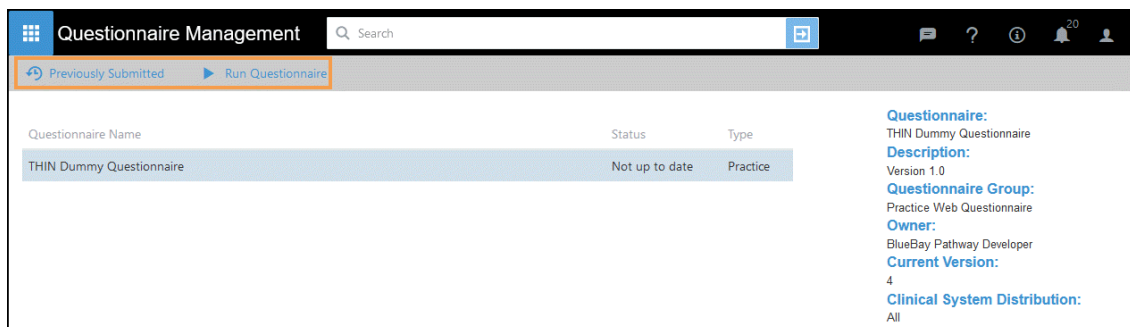
- **Practice level**
Completed once by a single member of the Practice.
These can be defined to be completed and submitted within a time frame.
- **Staff**
A questionnaire can be sent to practice staff to complete, for example, feedback on a training session.
- **Staff Patient Level**
Completed by members of staff against a list of patients. The designers of the questionnaire can email practices with a mail merge letter that invites these patients into the practice to complete the questionnaire with a member of staff.
These can also be time frame specific.
- **Public level**
Completed online by the patient once.

To Access/View Questionnaires

1. From the main **Dashboard** select **Questionnaires**.



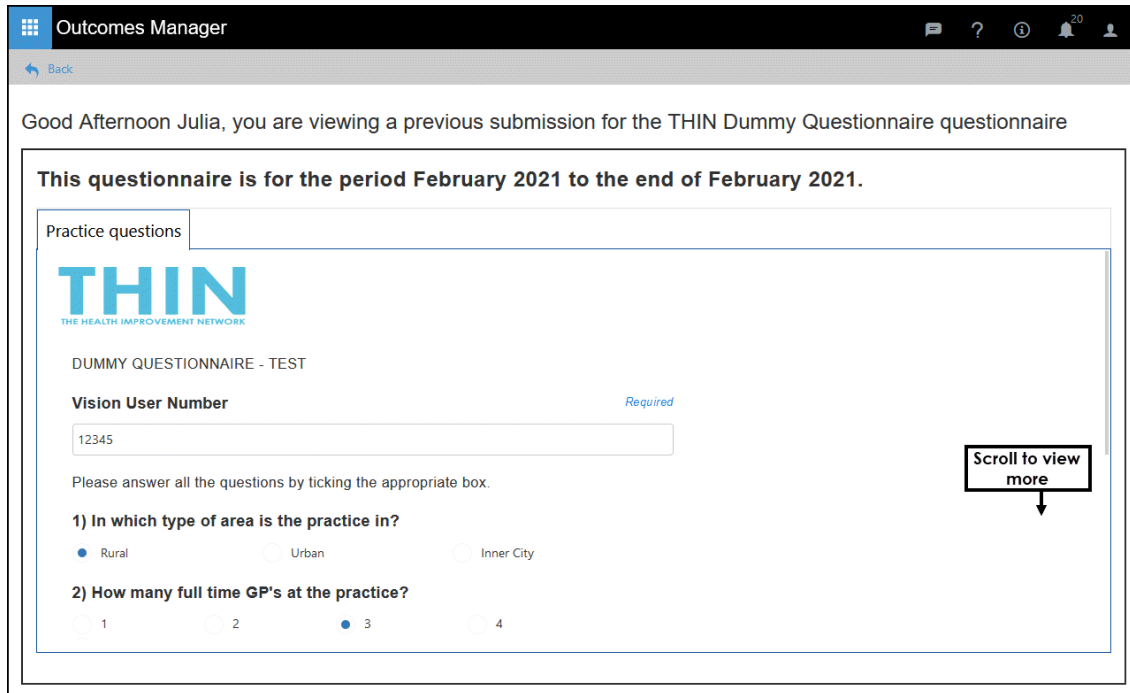
2. Select a **Questionnaire** from the list.



The toolbar refreshes to include the options of:

- **Previously Submitted**
Access all previously submitted entries
- **Run Questionnaire**
Complete the Questionnaire

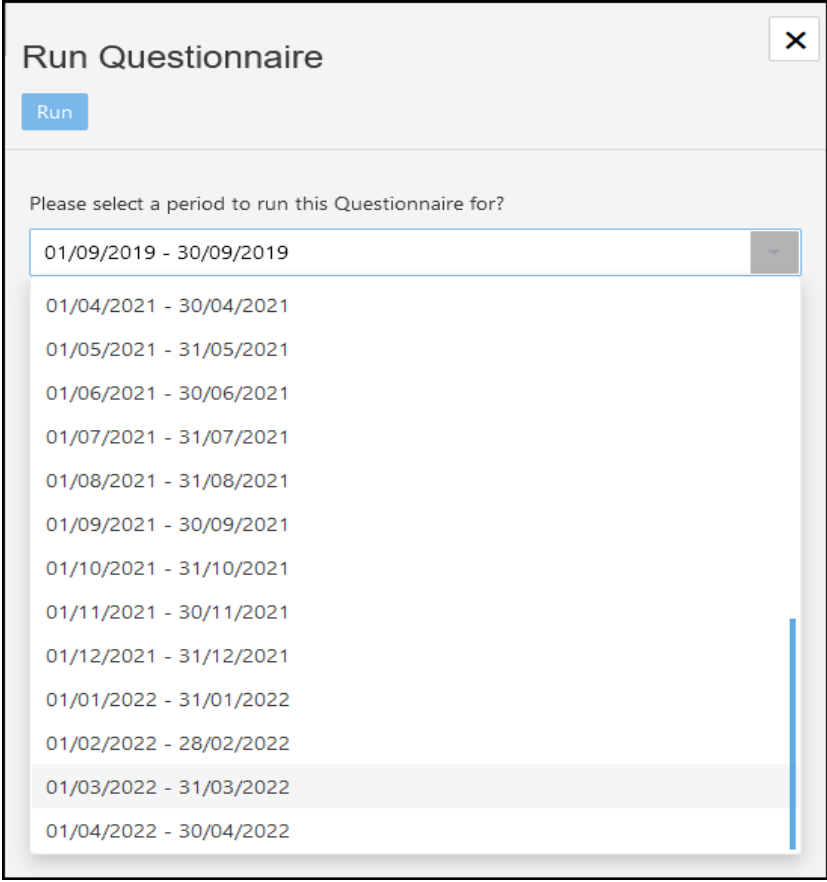
3. To view any previously completed entries, select **Previously Submitted**.
From the list select a submission to view.



The screenshot shows the Outcomes Manager interface. At the top, there is a navigation bar with the 'Outcomes Manager' logo and a 'Back' button. Below the navigation bar, a message reads: 'Good Afternoon Julia, you are viewing a previous submission for the THIN Dummy Questionnaire questionnaire'. The main content area is titled 'This questionnaire is for the period February 2021 to the end of February 2021.' and contains a 'Practice questions' section. The THIN logo is displayed, followed by the text 'DUMMY QUESTIONNAIRE - TEST'. A 'Vision User Number' field is shown with the value '12345' and a 'Required' label. Below this, a message states: 'Please answer all the questions by ticking the appropriate box.' Two questions are listed: '1) In which type of area is the practice in?' with radio buttons for 'Rural' (selected), 'Urban', and 'Inner City'; and '2) How many full time GP's at the practice?' with radio buttons for '1', '2', '3' (selected), and '4'. A 'Scroll to view more' button with a downward arrow is positioned on the right side of the questionnaire content.

The **Questionnaire** displays, scroll to view all submitted information.

4. Select **Run Questionnaire** to submit a new entry.



Run Questionnaire

Run

Please select a period to run this Questionnaire for?

01/09/2019 - 30/09/2019

01/04/2021 - 30/04/2021

01/05/2021 - 31/05/2021

01/06/2021 - 30/06/2021

01/07/2021 - 31/07/2021

01/08/2021 - 31/08/2021

01/09/2021 - 30/09/2021

01/10/2021 - 31/10/2021

01/11/2021 - 30/11/2021

01/12/2021 - 31/12/2021

01/01/2022 - 31/01/2022

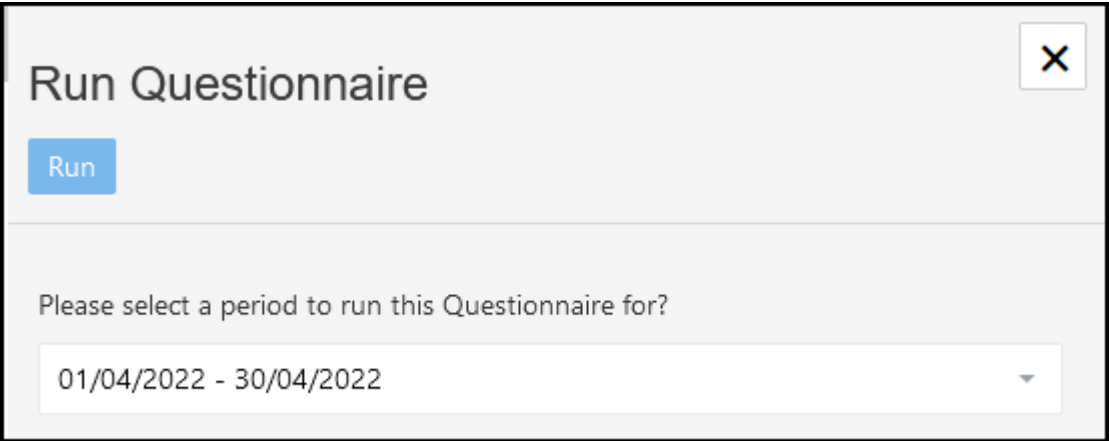
01/02/2022 - 28/02/2022

01/03/2022 - 31/03/2022

01/04/2022 - 30/04/2022

The **Settings** pop-up displays.

5. Select a date from the list, you may need to scroll down to see the latest date.
6. Select **Run** to start the **Questionnaire**.



Run Questionnaire

Run

Please select a period to run this Questionnaire for?

01/04/2022 - 30/04/2022

7. Complete the **Questionnaire**.

Good Morning Mark, you are running the THIN Dummy Questionnaire questionnaire

This questionnaire is for the period April 2022 to the end of April 2022.

Practice questions

1 2 3 4
 Other

3) How many part time GP's at the practice?

1 2 3 4
 Other

4) How many full time nurses at the practice?

1 2 3 4
 Other

5) How many part time nurses at the practice?

1 2 3 4
 Other

Questionnaire completed - thank you for your help.

8. Select **Save and Submit**.

A notification displays 'Are you sure you wish to submit this questionnaire?'

9. Select **OK** to submit.

A notification "Success... Thank you for completing the questionnaire." displays on submission.

Success...

Thank you for completing this questionnaire.