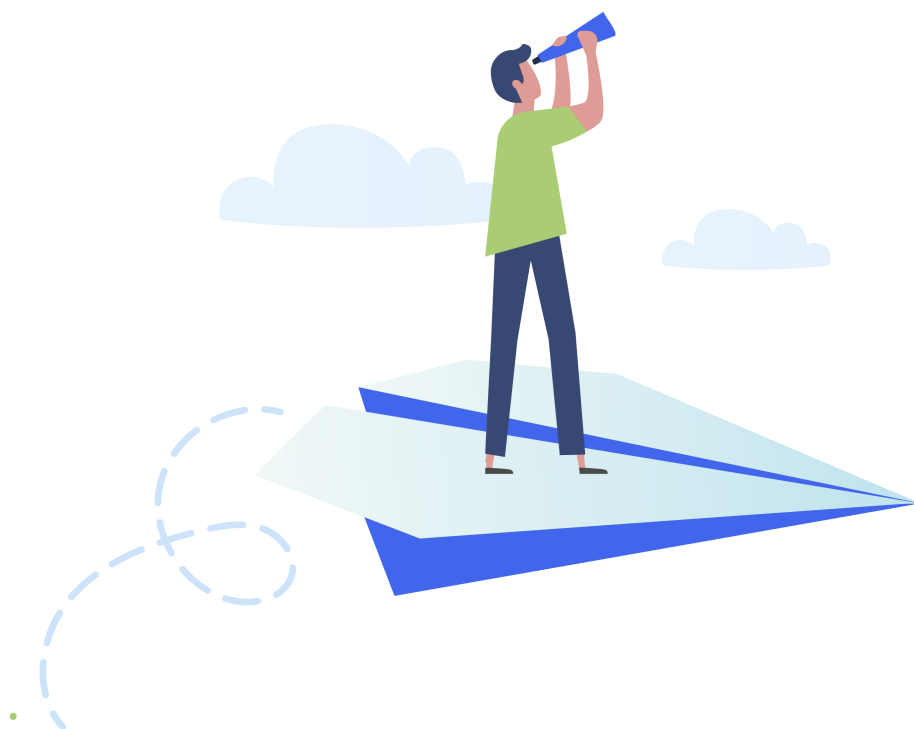




Outcomes Manager GP User Guide

Version 2.0

13 July 2022



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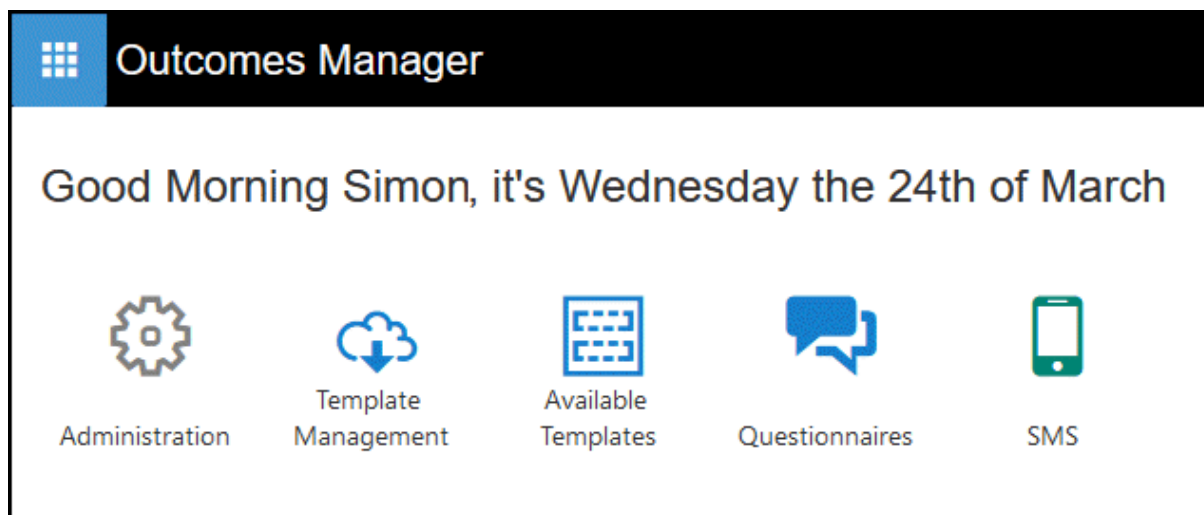
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Outcomes Manager GP

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](#).
- **View your practice's Licenses**
See - Outcomes Manager GP - Licences.
- **Manage Data Sharing options**
See - [Patient Consent on page 27](#).
- **View data extracted from your practice**
See - [Reporting Dashboard on page 45](#).



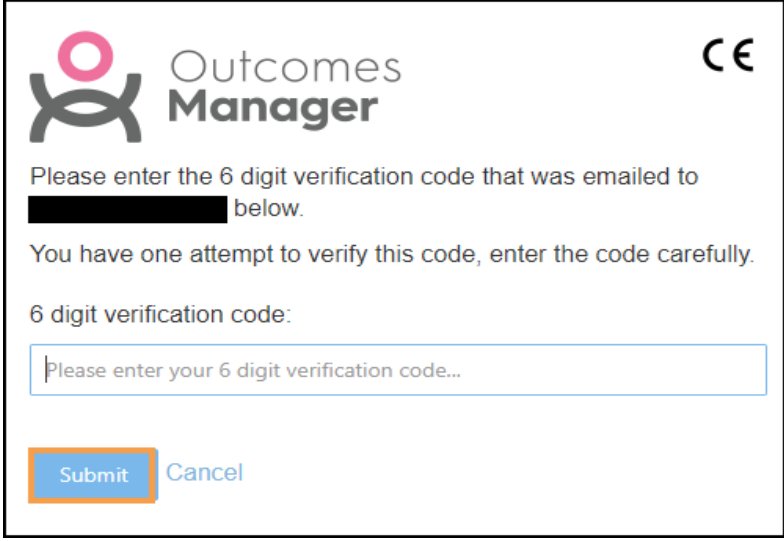
Note - The options available may vary by practice.


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 in to 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

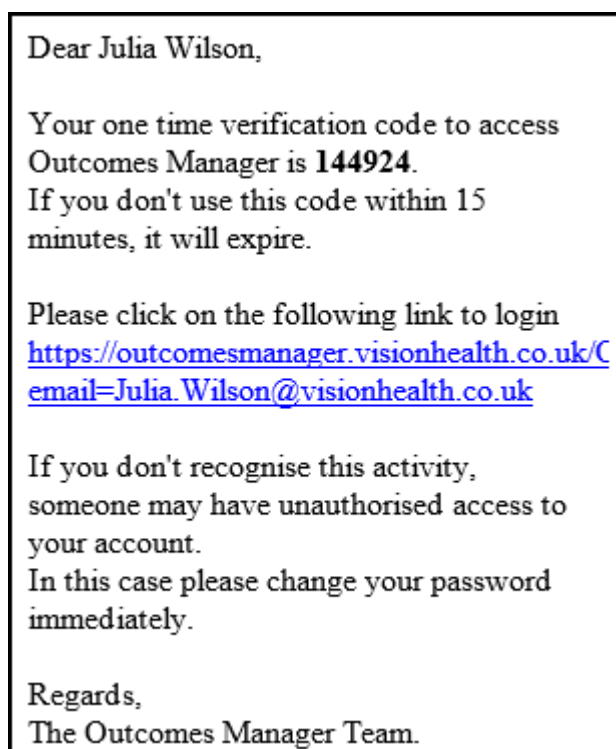
Please enter the 6 digit verification code that was emailed to [redacted] below.

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

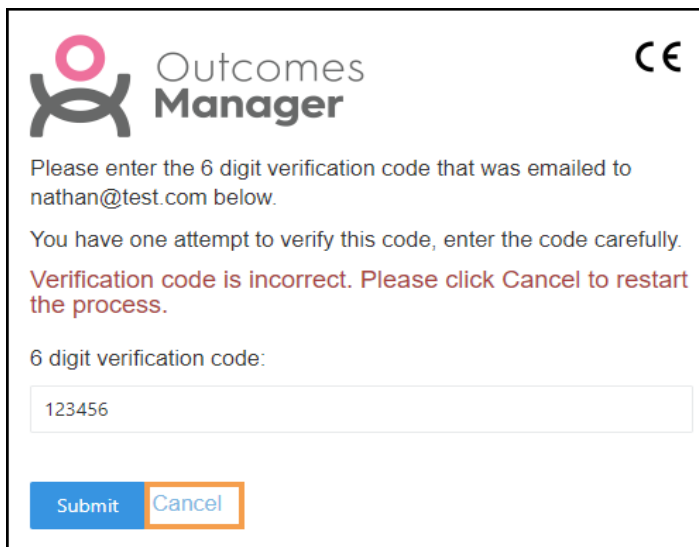
6 digit verification code:


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**.



 Outcomes
Manager CE

Please enter the 6 digit verification code that was emailed to nathan@test.com below.

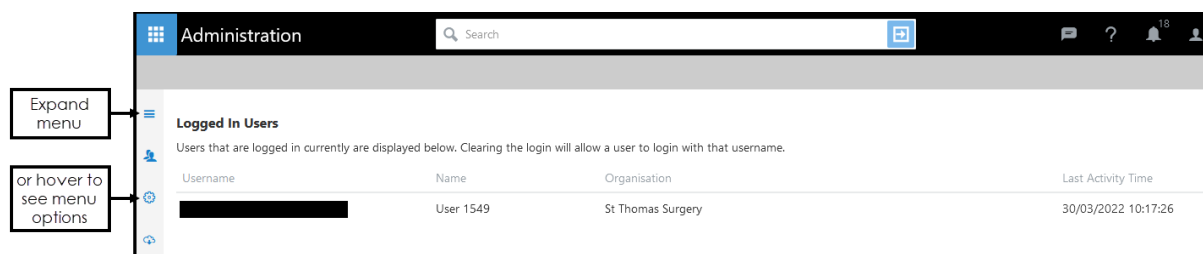
You have one attempt to verify this code, enter the code carefully.

Verification code is incorrect. Please click Cancel to restart the process.

6 digit verification code:

Administration

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



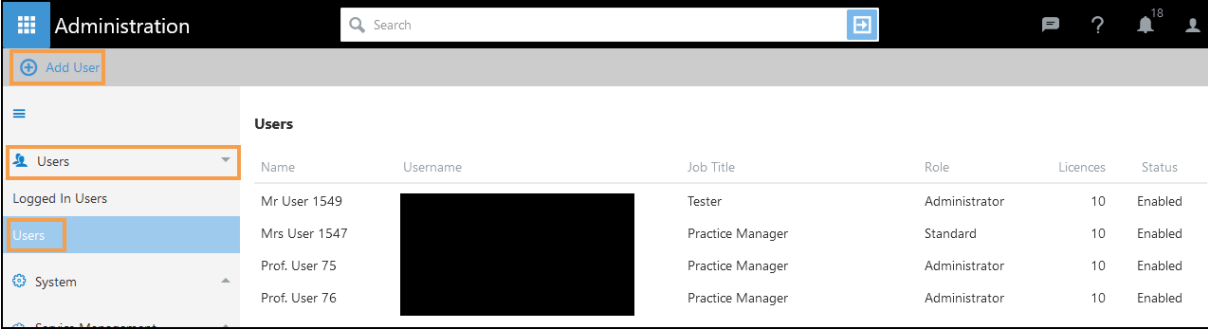
Administration Options

- **Users**
Create and manage user accounts, passwords and licences.
See - [User Accounts on the facing page](#).
- **System**
Create and manage the notifications that display to your practice.
See - [Notifications on page 22](#).
- **Service Management**
Manage **Patient Data Sharing Consent** for exports of patient identifiable data.
See - [Patient Consent on page 27](#).

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.



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 next page.](#)
- **Edit or Inactivating User Accounts**
See - [Edit User on page 14.](#)
- **Reset Passwords**
See - [Change Password on page 20.](#)
- **Unlock Accounts**
See - [Logged in Users on page 18.](#)

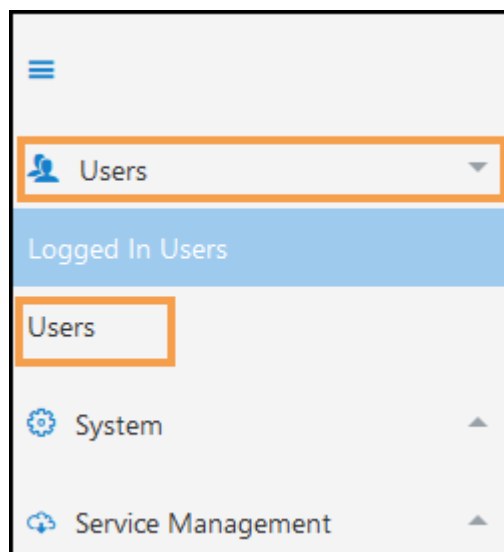
 See - [Administration on the previous page.](#)

Add User

Adding a **User** involves two stages:

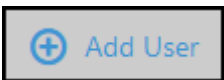
- Enter **User Detail**
- Allocate **Licences**

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**



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 method

Enabled:

☒

Organisation Details

Organisation:

Administrator:

☐ Is administrator

Licences:

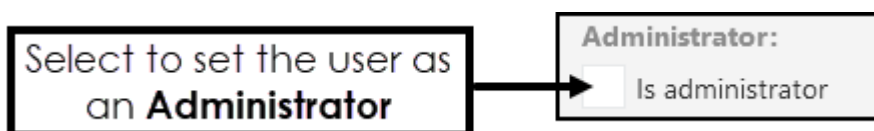
Product	Available	Assign

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 **Licenses** 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](#).

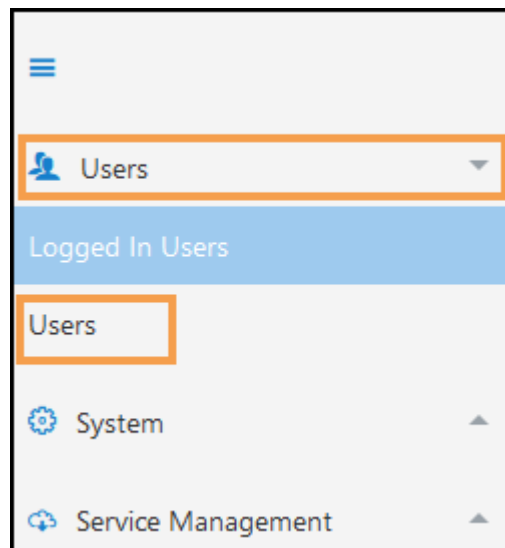
Edit User

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.

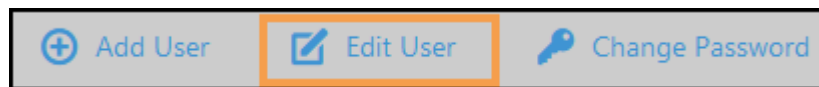


Users list displays.

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

Users					
Select a User					
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.user3@nhs.net	Practice Manager	Administrator	10	Enabled
Prof. User 76	practice.user1@nhs.net	Practice Manager	Administrator	10	Enabled

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



- Update **User details** as required:

Edit User

Save
Discard

Information

Title:

Ms

Name:

User

Surname:

75

Email:

practice.user3@nhs.net

Job Title:

Practice Manager

Authentication Type:

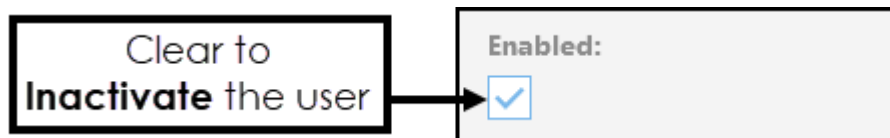
Normal authentication

- **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**

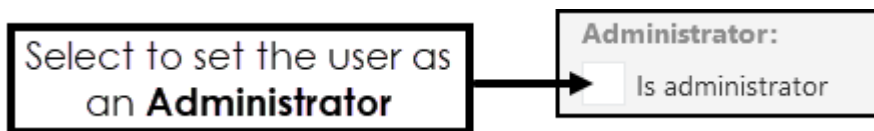
- **Authentication Type** (Mandatory)
Choose from **Normal authentication** or **Two Factor authentication - email** (recommended).
- **Enabled** (selected by default) activates the user account.

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 **Licenses** 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.



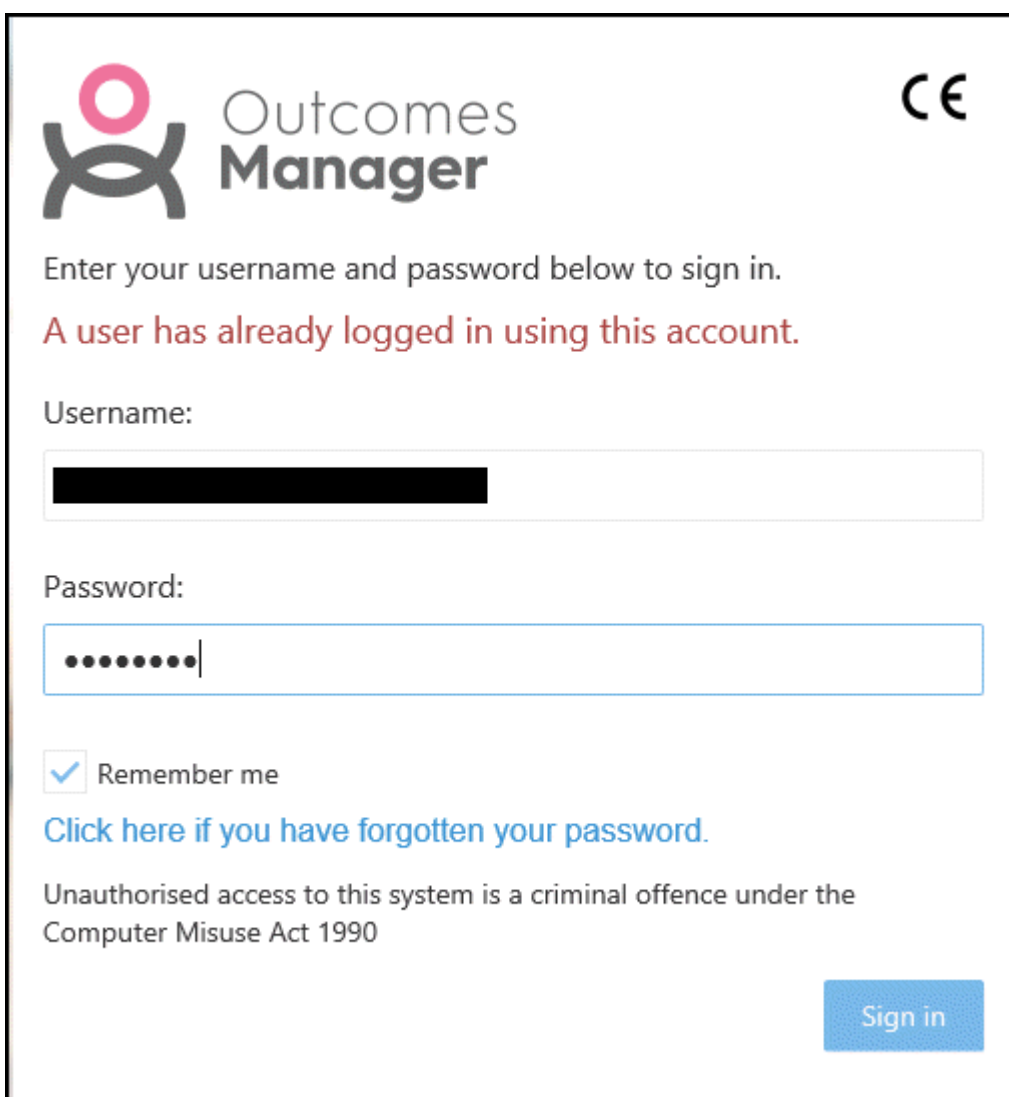
See - [Add User on page 10](#) and [Change Password on page 20](#).

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.

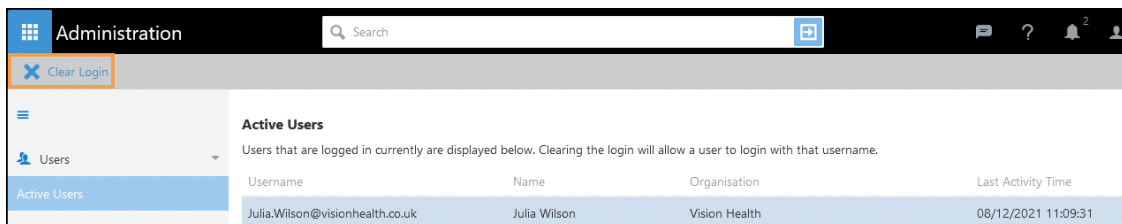


The screenshot shows the Outcomes Manager login interface. At the top left is the Outcomes Manager logo, and at the top right is a CE mark. Below the logo, it says "Enter your username and password below to sign in." followed by a red error message: "A user has already logged in using this account." There are input fields for "Username:" and "Password:". The username field contains a blacked-out string, and the password field contains a series of dots. Below the password field is a checkbox labeled "Remember me" which is checked. 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 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.

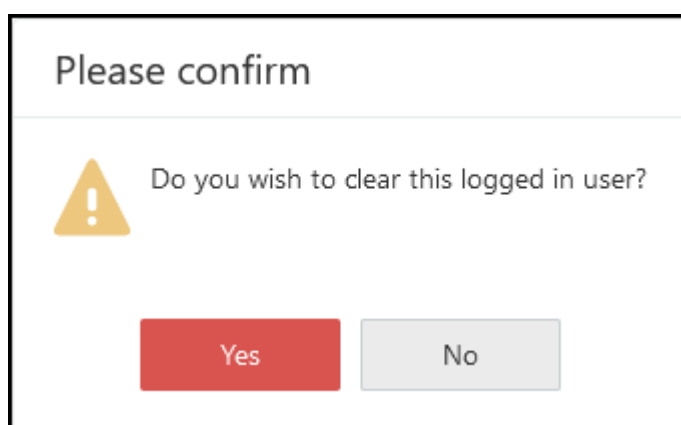
A list of **Logged in users** for your organisation displays.



Administration				
Search				
<div>Clear Login</div>				
<div>Users</div>				
<div>Active Users</div>				
<div>Active Users</div>				
<div>Users that are logged in currently are displayed below. Clearing the login will allow a user to login with that username.</div>				
Username	Name	Organisation	Last Activity Time	
Julia.Wilson@visionhealth.co.uk	Julia Wilson	Vision Health	08/12/2021 11:09:31	

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.

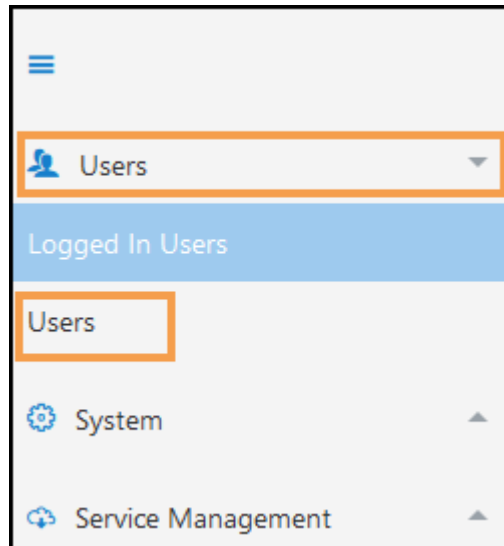
The user can now log back in.

➔ See - [User Accounts on page 9](#).

Change Password

To reset a password:

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

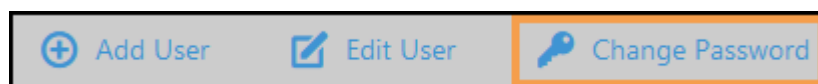


Users list displays.

3. Select the **User** you want to reset the password for.

Users					
Select a User					
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.user3@nhs.net	Practice Manager	Administrator	10	Enabled
Prof. User 76	practice.user1@nhs.net	Practice Manager	Administrator	10	Enabled

4. From the toolbar select the **Change Password**.



5. Enter the **Password**, then enter again in **Confirm Password**.



The image shows a 'Change Password' dialog box with a title bar, a close button (X), and two buttons: 'Save' and 'Discard'. Below the buttons is a section titled 'Information' with a dropdown arrow. Under 'Information', there are two sections: 'New Password:' and 'Confirm Password:'. Each section has a text input field. To the right of the dialog box, there are two labels: 'Enter Password' and 'Confirm Password', each with an arrow pointing to its respective input field.



Note - Password must contain at least one of each of the following: uppercase letter, lowercase letter and number/symbol.

The minimum length must be either 12 characters for a standard user or 16 characters for Administrators.

6. Select **Save** to update and **X** to close the pop-up.

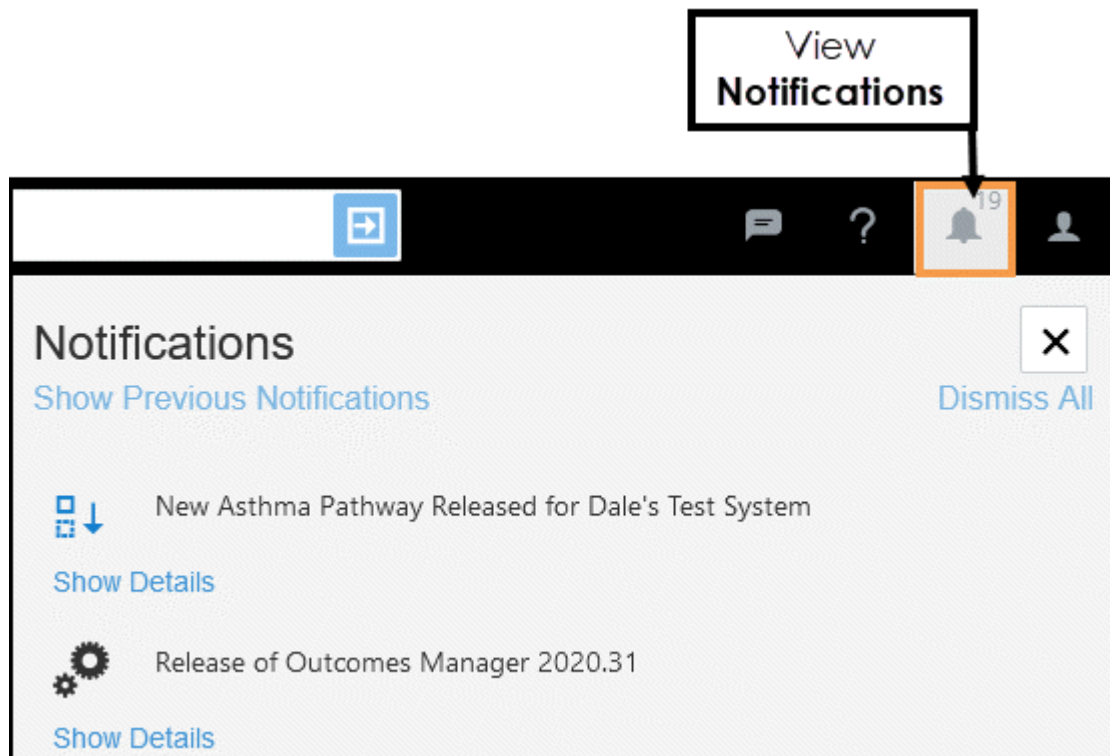


See - [Edit User on page 14](#).

Notifications

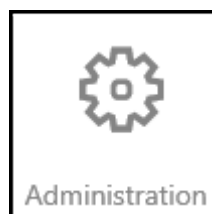
Administrators can create **Notifications**, these display as latest news on the **Outcomes Manager Dashboard**.

For example, a notification of a new pathway.



To create a **Notification**:

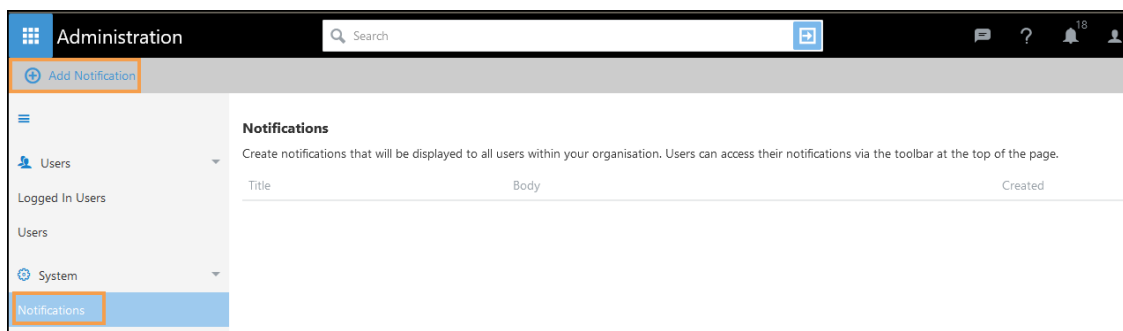
1. From the main **Dashboard** select the **Administration** tile.



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

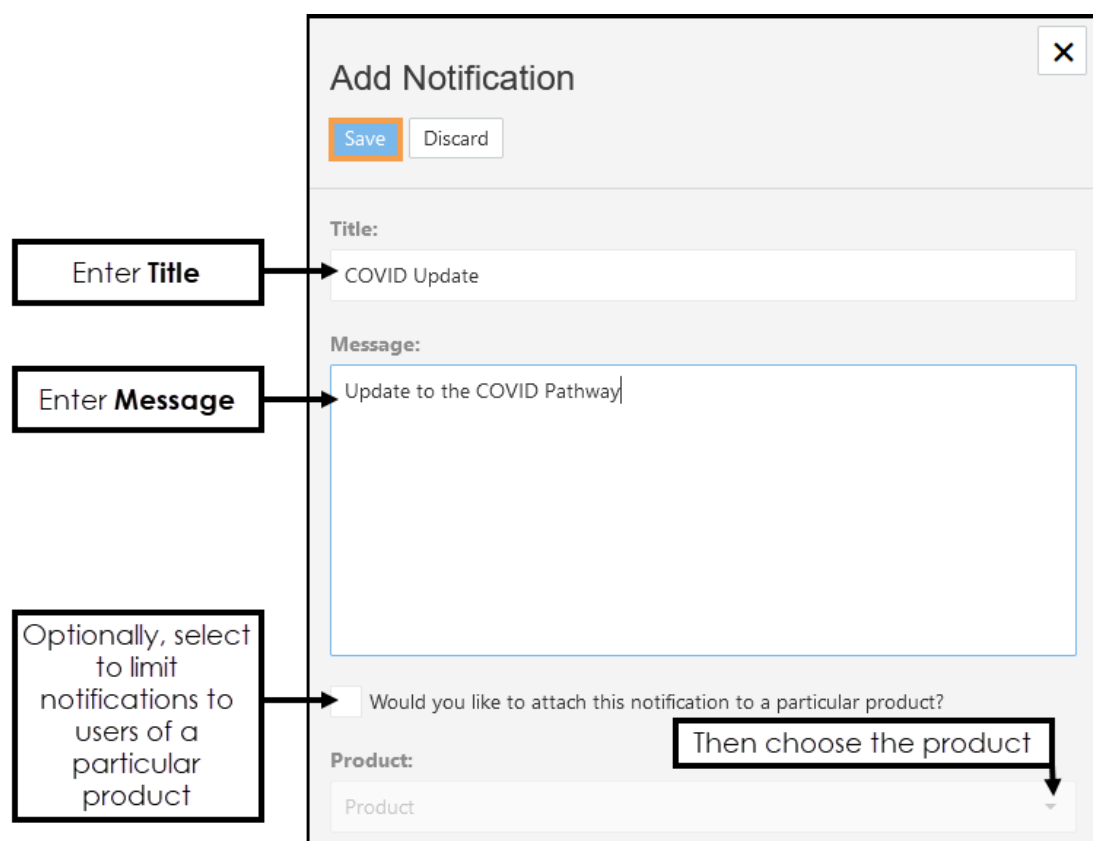
- Choose **Notifications** from the drop-down list.

The **Notifications** display.



The screenshot shows the 'Administration' page with a search bar and a sidebar. The 'Add Notification' button is highlighted in the top left. The 'Notifications' section is selected in the sidebar. The main content area shows a table with columns 'Title', 'Body', and 'Created'. Below the table, there is a description: 'Create notifications that will be displayed to all users within your organisation. Users can access their notifications via the toolbar at the top of the page.'

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



The 'Add Notification' dialog box is shown with the following annotations:

- Enter Title**: Points to the 'Title' input field, which contains 'COVID Update'.
- Enter Message**: Points to the 'Message' text area, which contains 'Update to the COVID Pathway'.
- Optionally, select to limit notifications to users of a particular product**: Points to the checkbox labeled 'Would you like to attach this notification to a particular product?'. Below this is a 'Product' dropdown menu.
- Then choose the product**: Points to the 'Product' dropdown menu.

At the top of the dialog, there are 'Save' and 'Discard' buttons. A close button (X) is in the top right corner.

- 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.

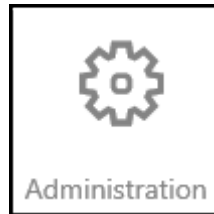
Users can access their notifications via the toolbar at the top of the **Dash-board**.



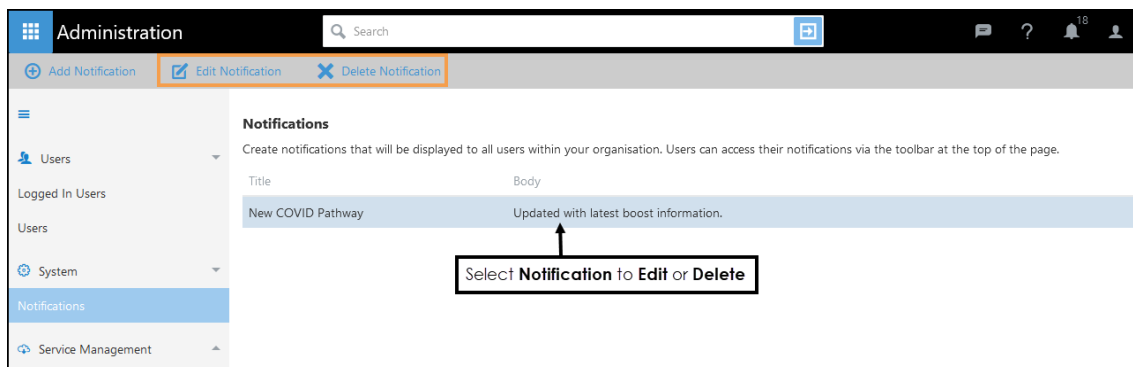
See - [Edit/Delete Notifications](#).

Edit or Delete Notifications


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



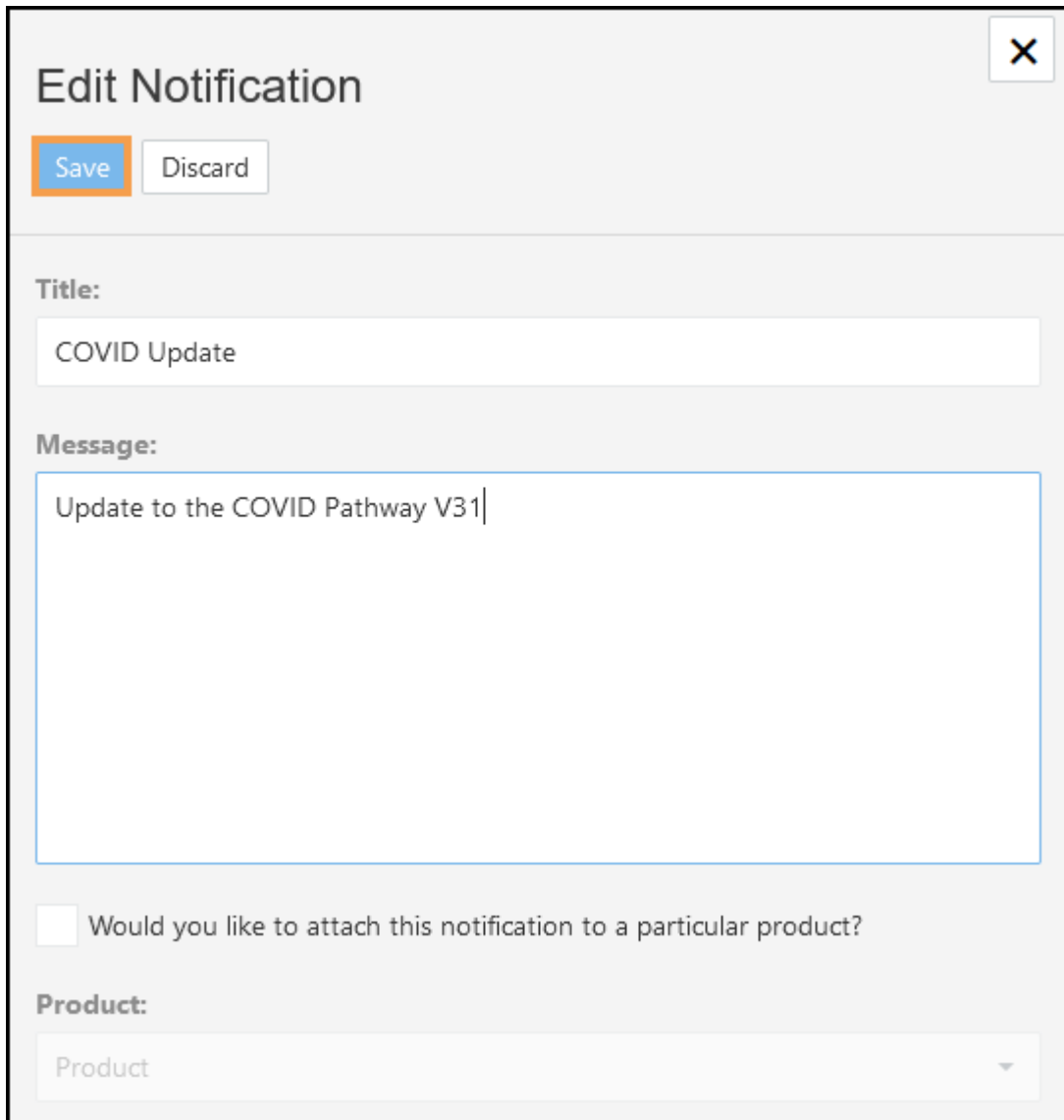
2. Select **System** from the left menu.
3. Select **Notifications** from the drop-down list.
Notifications display.
4. Select the **Notification** you want to **Edit/Delete**.



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**.



The 'Edit Notification' pop-up form has a title bar with a close button (X). Below the title bar are two buttons: 'Save' (highlighted with an orange border) and 'Discard'. The form contains two main sections: 'Title:' with a text input field containing 'COVID Update', and 'Message:' with a larger text area containing 'Update to the COVID Pathway V31'. Below these is a checkbox labeled 'Would you like to attach this notification to a particular product?'. At the bottom is a 'Product:' section with a dropdown menu currently showing 'Product'.

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

 See - [Notifications on page 22](#).

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.

 **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.

Yes
No

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?

Yes
No

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** 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 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 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 32](#).

7. Alternatively, to share data relating to specific extracts only, select the check box next to the extract.
8. To remove consent, clear the check box next to the relevant **Organisation/Extract**.
9. 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?

Yes
No

10. 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)

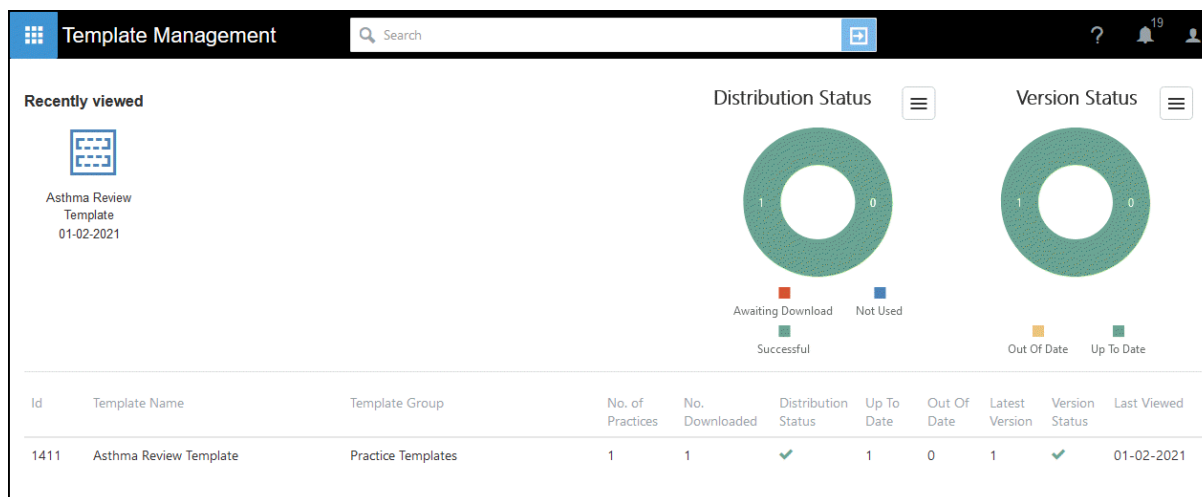
i **Important** - These codes can be superseded by use of the *Dissent withdrawn for secondary data use* code as detailed under Opt In.

→ See - [Patient Consent on page 27](#).

Template Management

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

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.

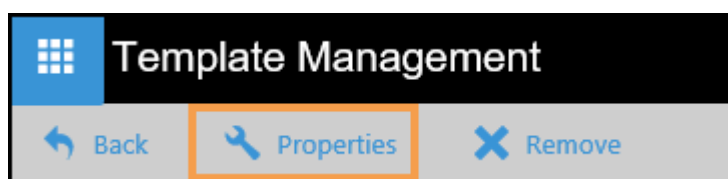


See - [Edit Template Properties on the facing page](#) and [Remove Template on page 44](#)

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**.

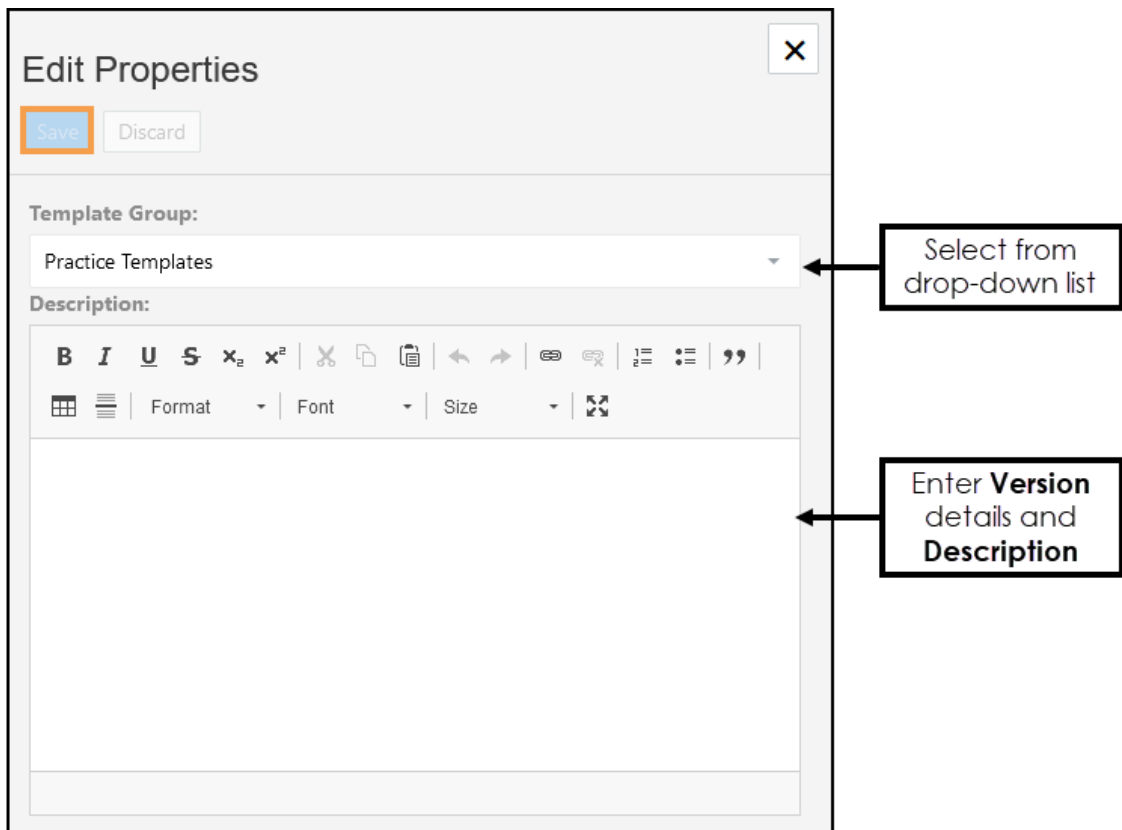


The **Edit Properties** pop-up displays.

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.



Edit Properties

Save Discard

Template Group:

Practice Templates

Description:

B I U S x₂ x² | Cut Copy Paste | Undo Redo | Link Unlink | Bulleted List Numbered List | Quote

Format Font Size

Select from drop-down list

Enter **Version** details and **Description**

6. Select **Save** to update.

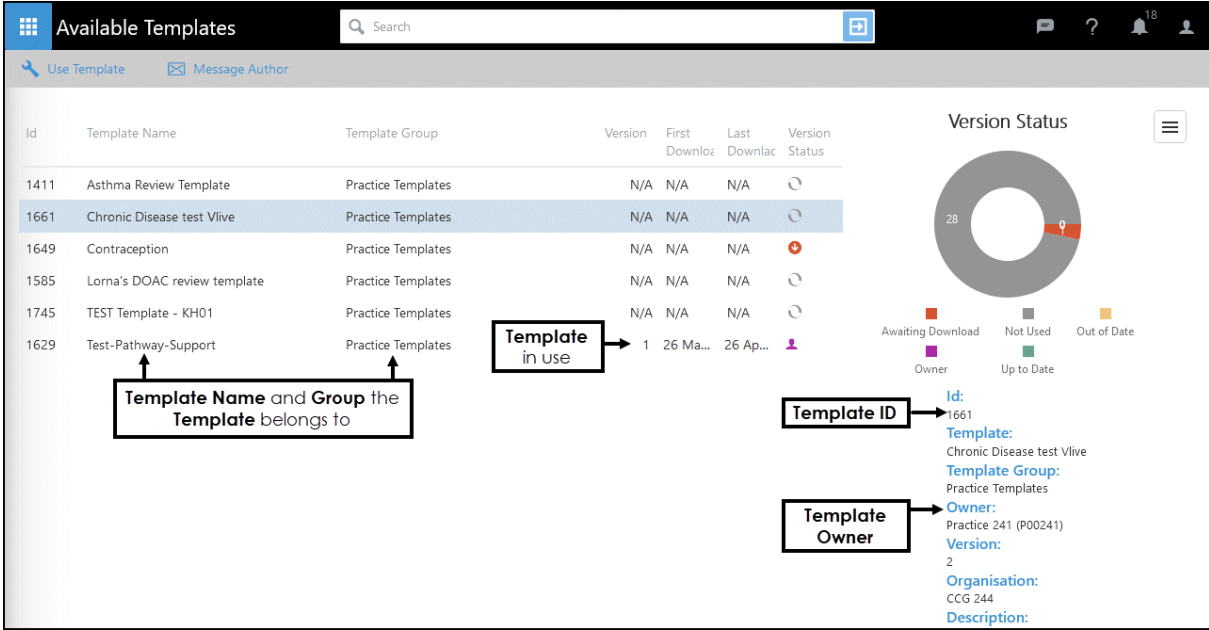
This information displays to users in the **Available Templates** view.

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

Available Templates

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

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



Available Templates

Search

Use Template Message Author

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	Awaiting Download
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 Mar...	26 Apr...	Owner

Version Status

28

Awaiting Download Not Used Out of Date Owner Up to Date

Template Name and Group the Template belongs to

Template ID

Template Owner

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

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



Awaiting Down-

load

Templates 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

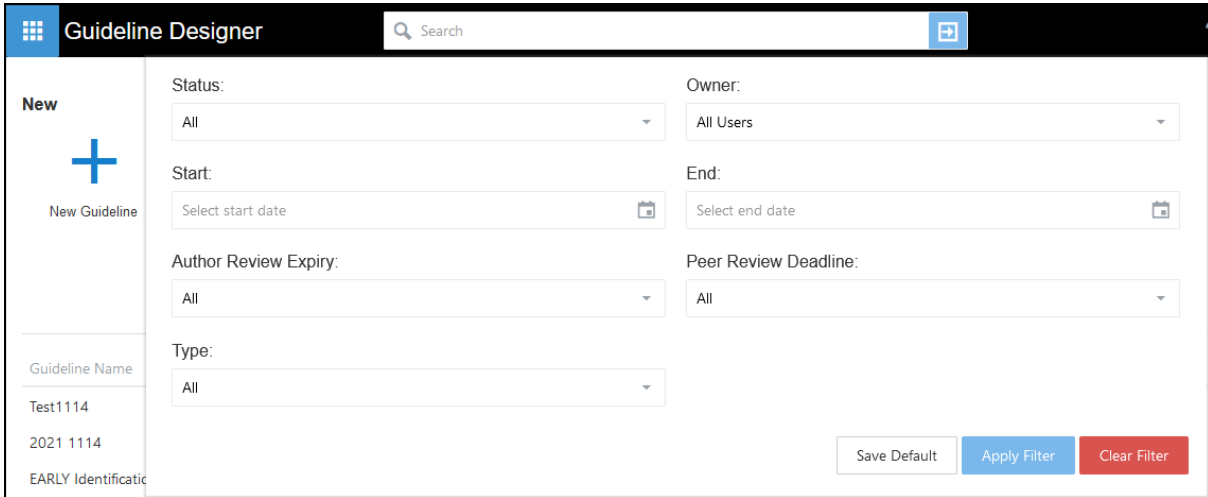
Template already in use at your practice



See - [Download Templates on page 40](#) and [Message Author on page 43](#).

Searching for a Template

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



The screenshot shows the 'Guideline Designer' interface. At the top, there is a search bar with a magnifying glass icon and a 'Search' button. Below the search bar, there are several filter sections:

- Status:** A dropdown menu with 'All' selected.
- Owner:** A dropdown menu with 'All Users' selected.
- Start:** A date picker with 'Select start date' and a calendar icon.
- End:** A date picker with 'Select end date' and a calendar icon.
- Author Review Expiry:** A dropdown menu with 'All' selected.
- Peer Review Deadline:** A dropdown menu with 'All' selected.
- Type:** A dropdown menu with 'All' selected.

On the left side, there is a sidebar with a 'New' button (a blue plus sign) and a 'New Guideline' link. Below this, there is a list of guidelines with columns for 'Guideline Name' and 'EARLY Identification'. The list includes 'Test1114' and '2021 1114'.

At the bottom right, there are three buttons: 'Save Default', 'Apply Filter', and 'Clear Filter'.

- **Status**
The **Status** of the **Guideline**:
All, Archived, Draft, In Review, or Published.
- **Owner**
Select the **Owner** from the drop-down list or start typing the owner's name.
- **Start**
Select a **Start** date from the **Calendar**.
- **End Date**
Select the **End** date from the **Calendar**.
- **Author Review Expiry**
Search for any **Guideline** with a **Review Date**:
All, Author review overdue, Author review due within a month, Author review due within 2 months or Author review due within 3 months.
- **Peer Review Deadline**
Search for any **Guidelines** containing **Peer Reviews**:
All, Peer review overdue, Peer review due within a month, Peer review due within 2 months or Peer review due within 3 months.

- **Type**

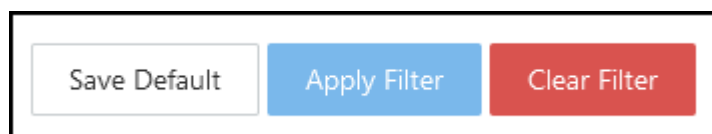
Find any **Guidelines** by type:

All, Guidelines or Templates.



Note - The **All** option returns all the **Guidelines** regardless of status.
For example, **All** under **Peer Review** returns all records with and without a **Peer Review** status.

Using Filters



1. Select the appropriate **Filters**.

For example, a specific owner, and **Peer review** overdue.

2. Select **Apply Filter**.

The results display.

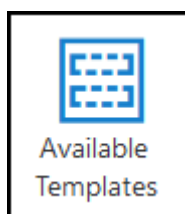
Guideline Name	Type	Status	Owner	Author Review Deadline	Peer Review Deadline	Reviewers	Modified
2021 1114	Guideline	 In Review	Julia Wilson		28/04/2021	Julia Test2	28/04/2021

3. If you are an **Administrator**, you can select **Save Default** to save the filters 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**.

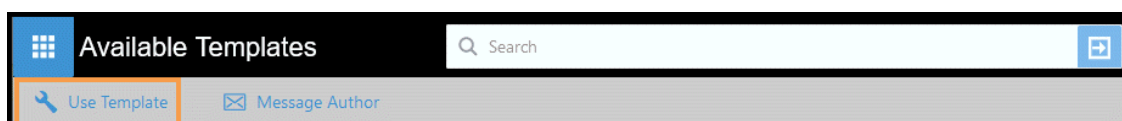


A list of **Templates** displays with the **Version status** to the right of the **Template** details.

-  **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?

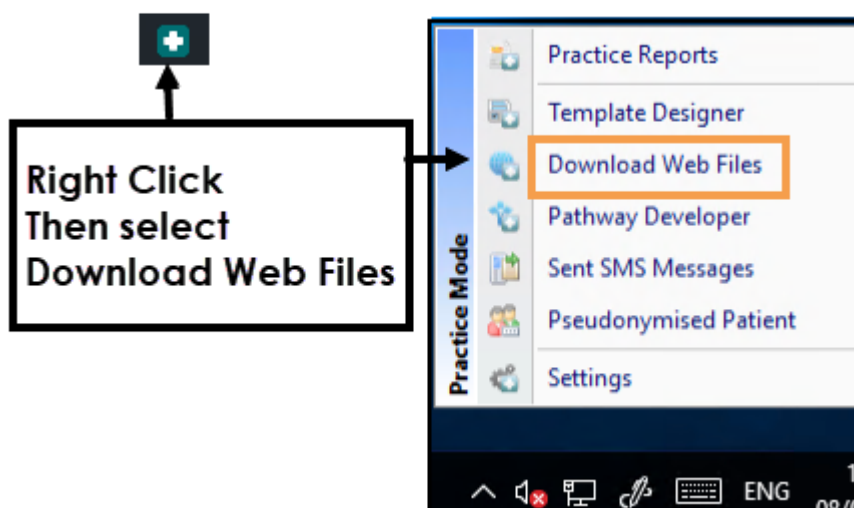
Use Template

No

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

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

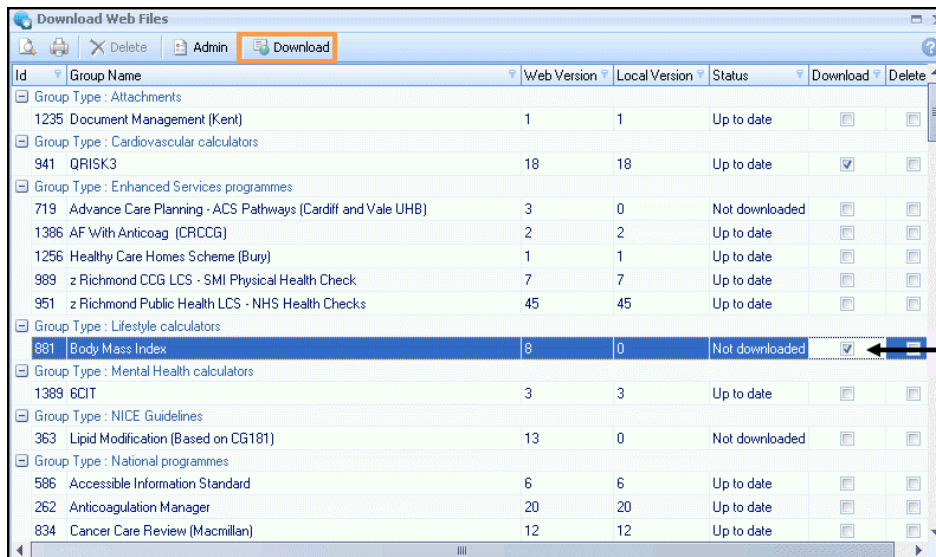
5. Sign in to **Vision**, right click on **Vision +**, and select **Download Web files**.




Note - To access **Download Web Files**, do not have a patient selected in **Consultation Manager**.

A list of **Templates** and **Calculators** available for download and those already in use display.

6. Select **Download** next to the **Template(s)** you want to use in your practice.



Select to download

7. Select **Download** from the toolbar.
8. On completion, select  to close **Download Web Files**.

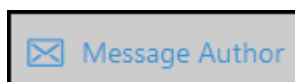
The template(s) are automatically available to everyone in the practice.

➔ See - [Available Templates on page 37](#) and [Message Author on the facing page](#).

Message Author

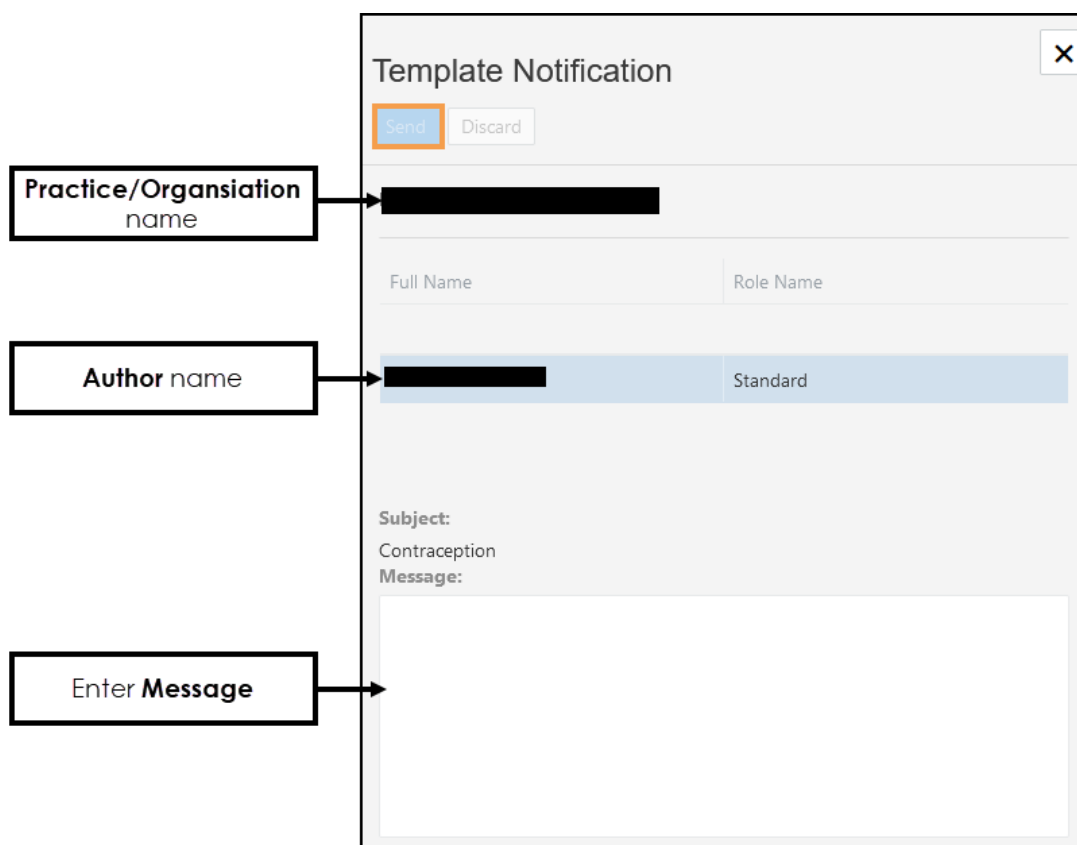
This enables you to send a message to the **Author** of a **Template**.

1. From **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 diagram showing a "Template Notification" pop-up form. On the left, three boxes with arrows point to specific fields in the form: "Practice/Organsiation name" points to the top text field; "Author name" points to the "Full Name" field; and "Enter Message" points to the large text area at the bottom. The form itself has a title bar with a close button (X). Below the title bar are "Send" and "Discard" buttons. The main content area includes fields for "Full Name" and "Role Name", with "Standard" entered in the "Role Name" field. Below these are labels for "Subject:" (with "Contraception" entered) and "Message:" (with a large text area for input).

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 37](#) and [Download Templates on page 40](#).

Remove Template

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

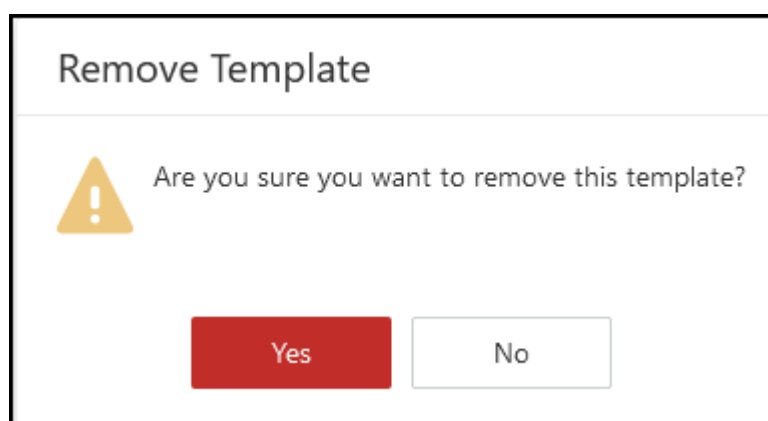
1. From the **Dashboard** select **Template Management**.

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.

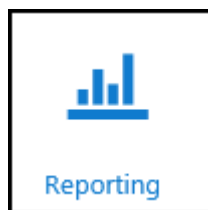
1435 England QOF	Obsolete - please delete			4	4
------------------	--------------------------	---	---	---	---

Reporting Dashboard

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 5 reports viewed.

Or use the **Search** bar to apply a filter. See - [Filters on page 47](#).

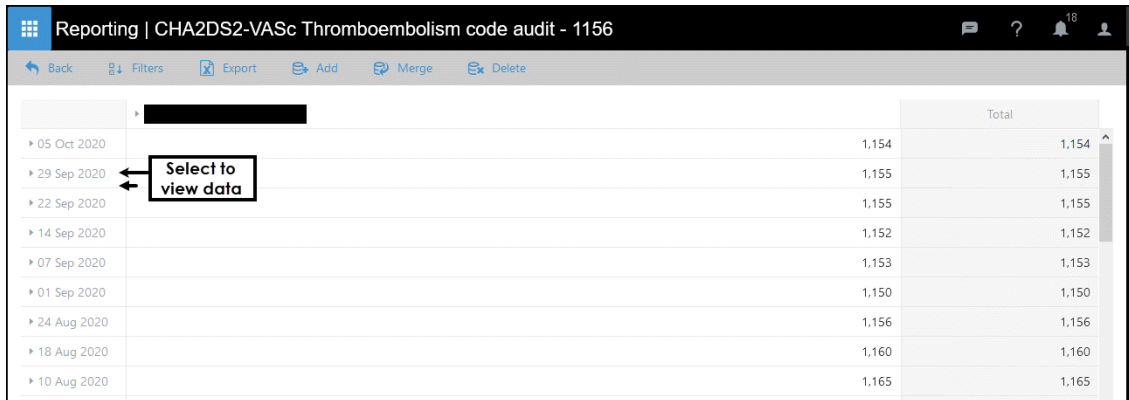
Reporting				
<div> <div>CHA2DS2-VASc Thromboembolism 03-03-2021</div> <div>CHA2DS2-VASc Thromboembolism 01-01-1</div> <div>DMARDs Manager 01-01-1</div> <div>Seasonal flu vaccination 01-01-1</div> </div>				
Name	Version Status	Owner	Viewed	
CHA2DS2-VASc Thromboembolism code audit	▲	INPS Pathway Developer	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	1,154
► 29 Sep 2020	← Select to view data	1,155	1,155
► 22 Sep 2020		1,155	1,155
► 14 Sep 2020		1,152	1,152
► 07 Sep 2020		1,153	1,153
► 01 Sep 2020		1,150	1,150
► 24 Aug 2020		1,156	1,156
► 18 Aug 2020		1,160	1,160
► 10 Aug 2020		1,165	1,165

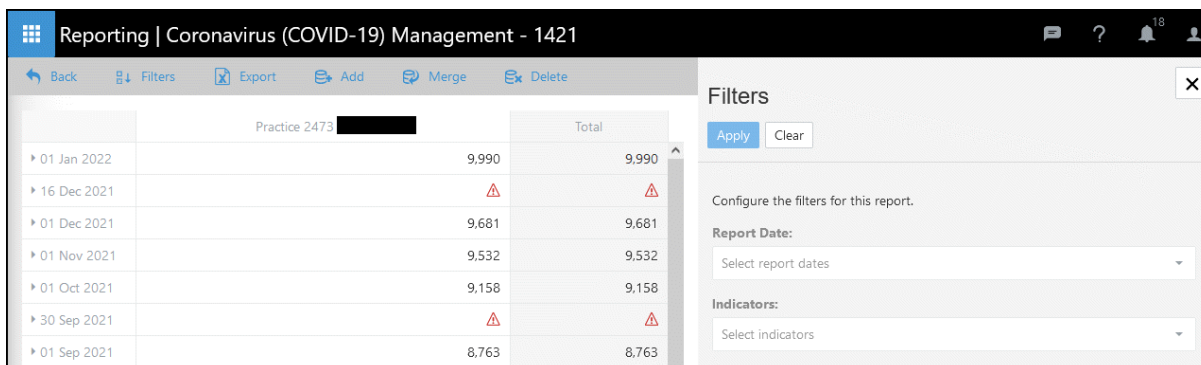
You can also **Filter** and **Export** the data.

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

Filters

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

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



	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 - [Reporting Dashboard on page 45](#).













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.

Name		
		Active Patients Central Report
		CKD Manager
		Coronavirus (COVID-19) Management
		 Pathway
		Standard medication review 

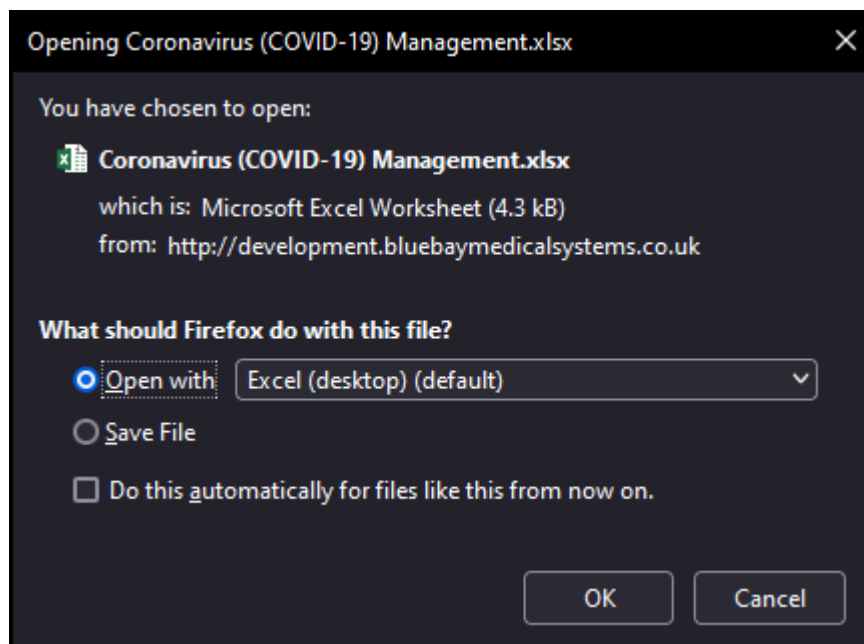
The **Extract** displays

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:

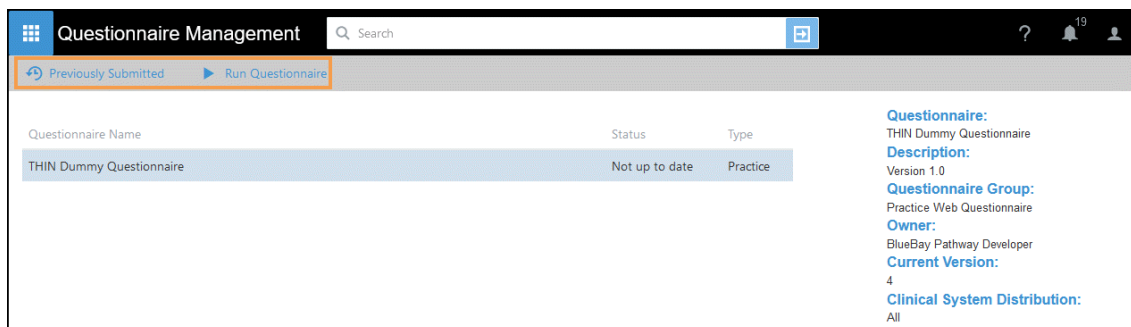
- **Practice level**
Completed once by a single member of the Practice.
These can be defined to be completed and submitted within a time frame.
- **Staff**
A questionnaire can be sent to practice staff to complete, for example, feedback on a training session.
- **Staff Patient Level**
Completed by members 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**.



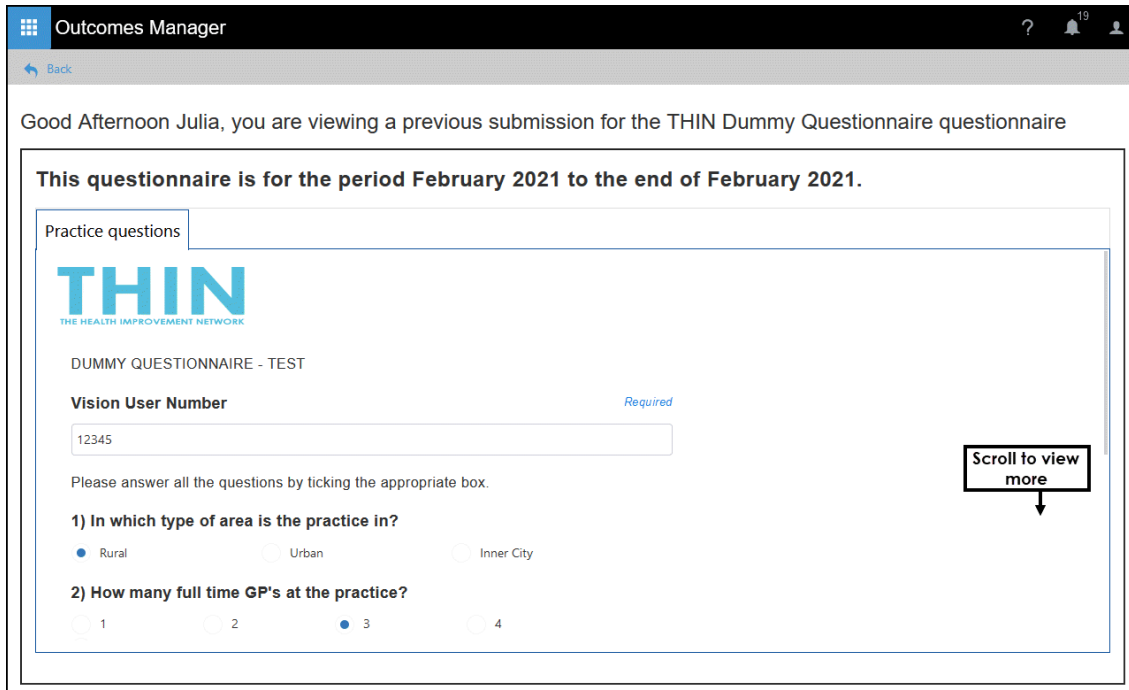
2. Select a **Questionnaire** from the list.



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.



Outcomes Manager

Back

Good Afternoon Julia, you are viewing a previous submission for the THIN Dummy Questionnaire questionnaire

This questionnaire is for the period February 2021 to the end of February 2021.

Practice questions

THIN
THE HEALTH IMPROVEMENT NETWORK

DUMMY QUESTIONNAIRE - TEST

Vision User Number Required

12345

Please answer all the questions by ticking the appropriate box.

1) In which type of area is the practice in?

☒ Rural ☐ Urban ☐ Inner City

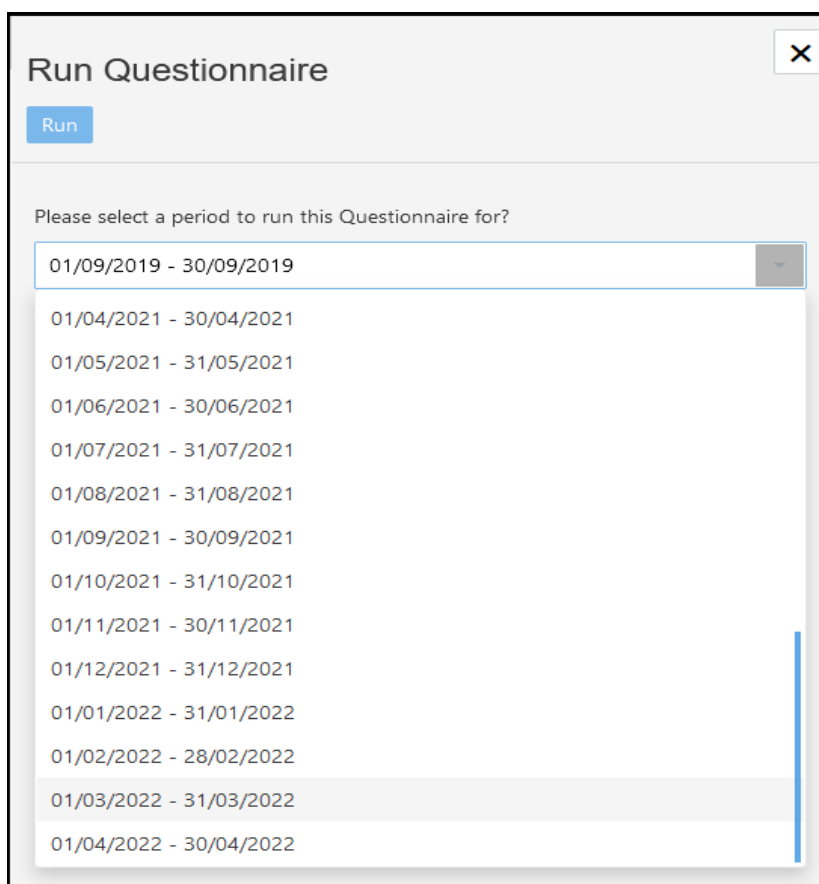
2) How many full time GP's at the practice?

☐ 1 ☐ 2 ☒ 3 ☐ 4

Scroll to view more

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

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



Run Questionnaire [X]

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

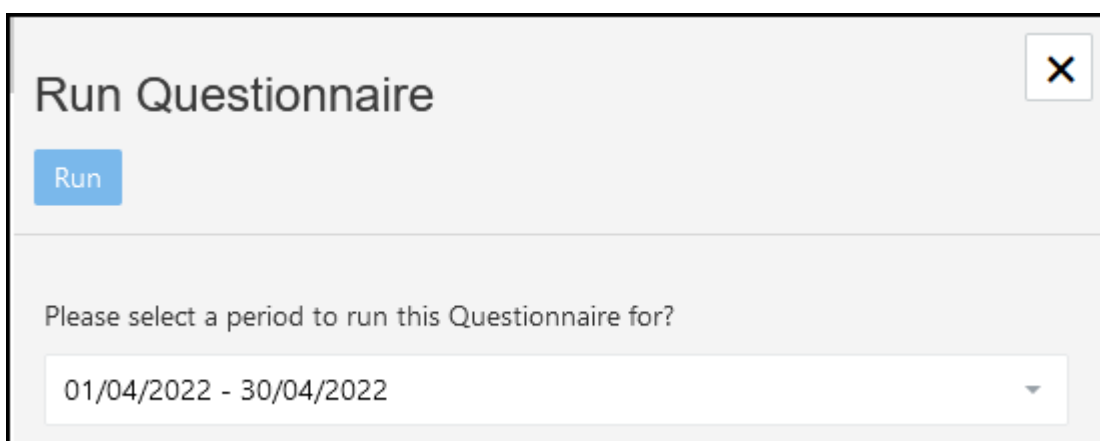
01/02/2022 - 28/02/2022

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 [X]

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.

[Save](#) [Save and Submit](#)

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.

[OK](#)