Appointments

Using Appointments in a Shared Care Setting

Version 1

26 April 2022

cegedim
Healthcare Solutions

Contents

Using Appointments in a Shared Care Setting

Appointments can be used in the following shared care settings:

- **Federations (England) or Clusters (Scotland and Wales)**

  - **A Common Book** - Providing a sharing agreement is set up, multiple practices can access a common appointment book, for example, a Physiotherapy clinic. Each practice can book appointments for their own patients in the shared service and can view their own patient's information, but appointments booked for patients registered elsewhere display as **Booked** with no further information available:
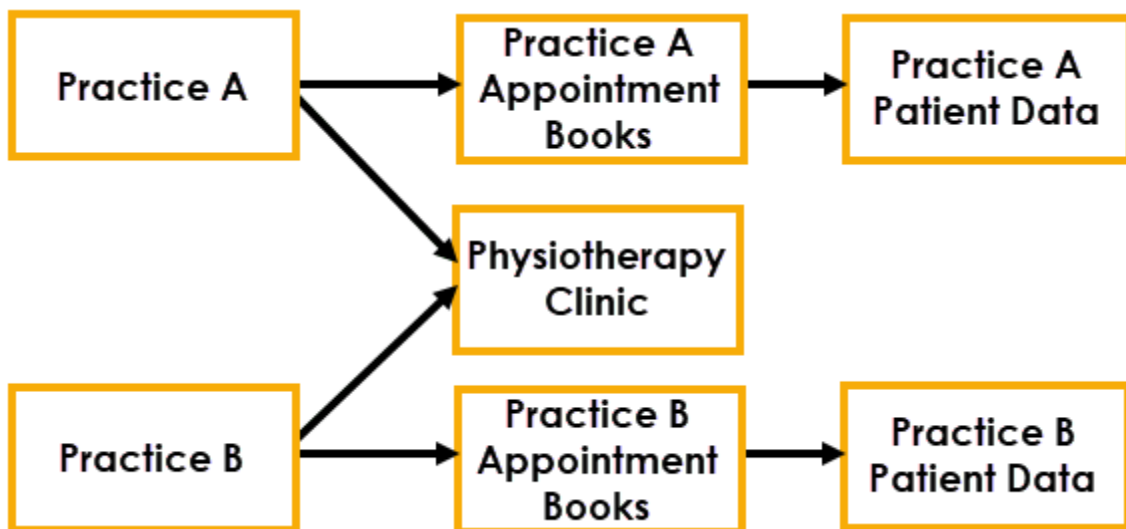
  - **Full Shared Care access** - Providing a sharing agreement is set up, a practice can have full access to another practice's patient details, for example, where a practice acts as an 'Out of Hours' service for one or more other practices:
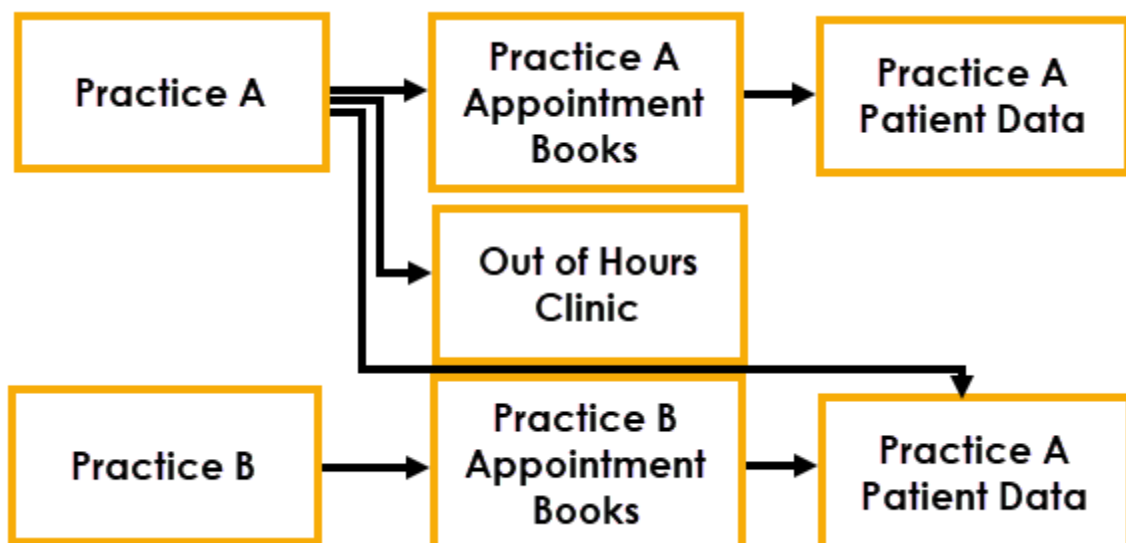
Most **Appointments** functionality is the same whether you are accessing your practice's patients or you are working as part of a shared care organisation.

The following functionality is specific to shared care access:

- **Uploading EMIS patients** - In order to have access to all the **EMIS** patient data available within your shared care settings, you must upload it to **Vision360**.

See **Uploading Patients from EMIS to Vision360** on page **7** for details.

- **Logging in** - To use the shared care options within **Appointments**, you must log in from your Desktop.

- **Selecting Role** - When you log in to **Appointments** from your desktop, if you have more than one role assigned to you in **Vision360**, you have the option to select your local practice, if you have one, or the shared care service required. Your choice here, determines the initial appointments list(s) offered.

- **Change Service** - You can also change the service you are viewing from within **Appointments**. From relevant screens, a select service option displays, select from the available list as required:
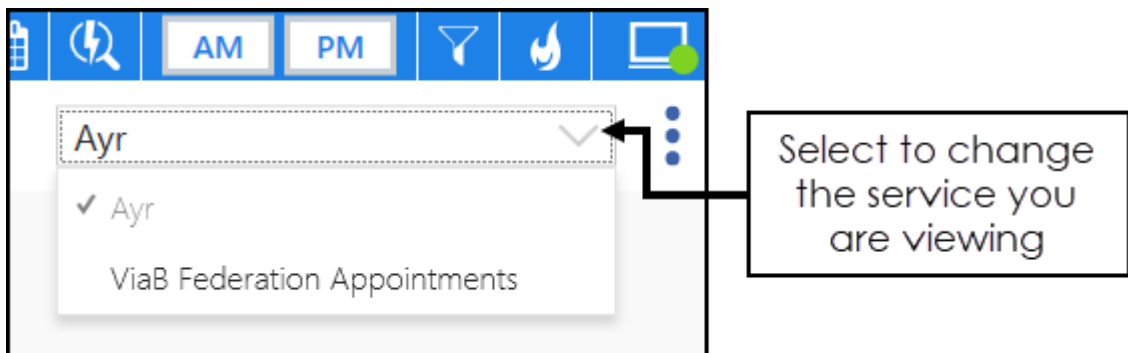
- **Viewing Appointments Booked**:

  - **A Common book** - In a shared service with a common book, appointments booked for patients not registered at your practice, display as '**Booked**' in the **Reception View**:
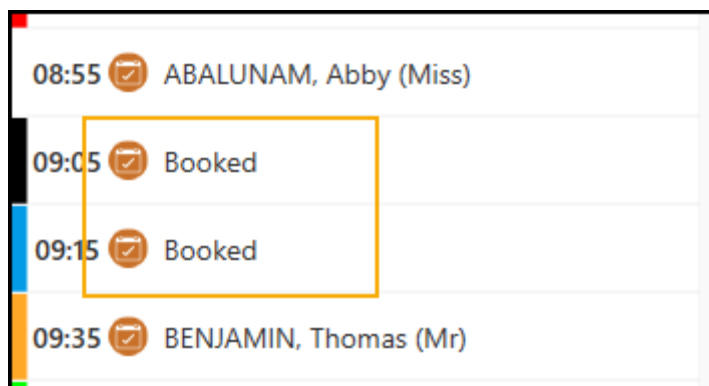
  - **Full Shared Care access** - In a full shared care service, the patient name displays in the **Reception View** regardless of their registered practice.

- **Searching for a Patient** - If you have full shared care access, the patient search results include the patient's registered practice:
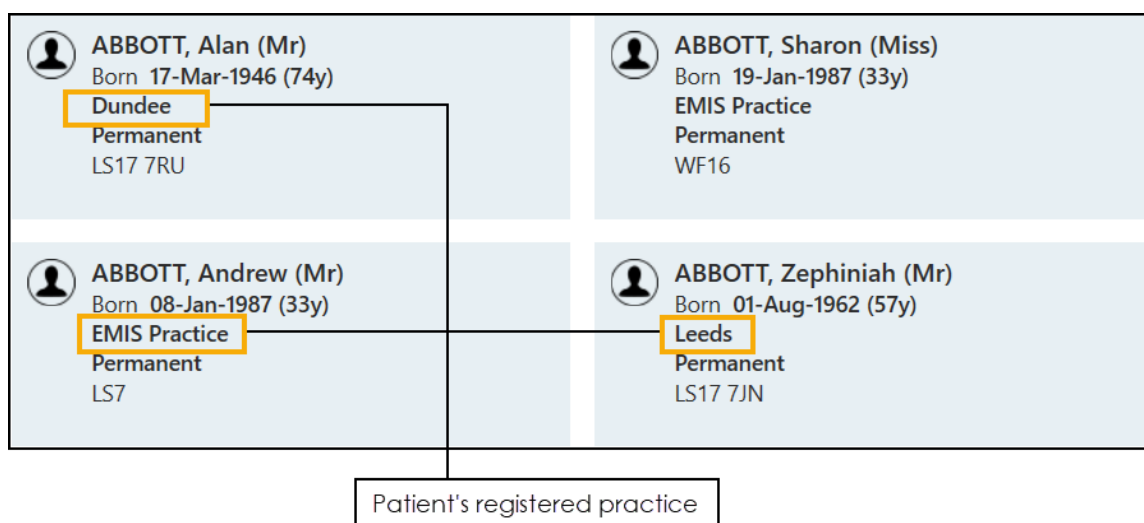
ⓘ **Important** - You cannot access **Appointments Setup** for any practice except your own.

✎ **Note** - Appointment books for shared care services are currently set up in **Vision360**, see Appointments Administration for details.

Uploading Patients from EMIS to Vision360

In order to have access to all the **EMIS** patient data available within your shared care setting, you must upload it to **Vision360**. You should run an initial upload and then a daily update.

To upload and update your patient list to **Vision360**:

1. From your desktop, double click **Patient Demographic Uploader**

2. The **Vision - Patient Demographic Uploader** and **npm** screens display:
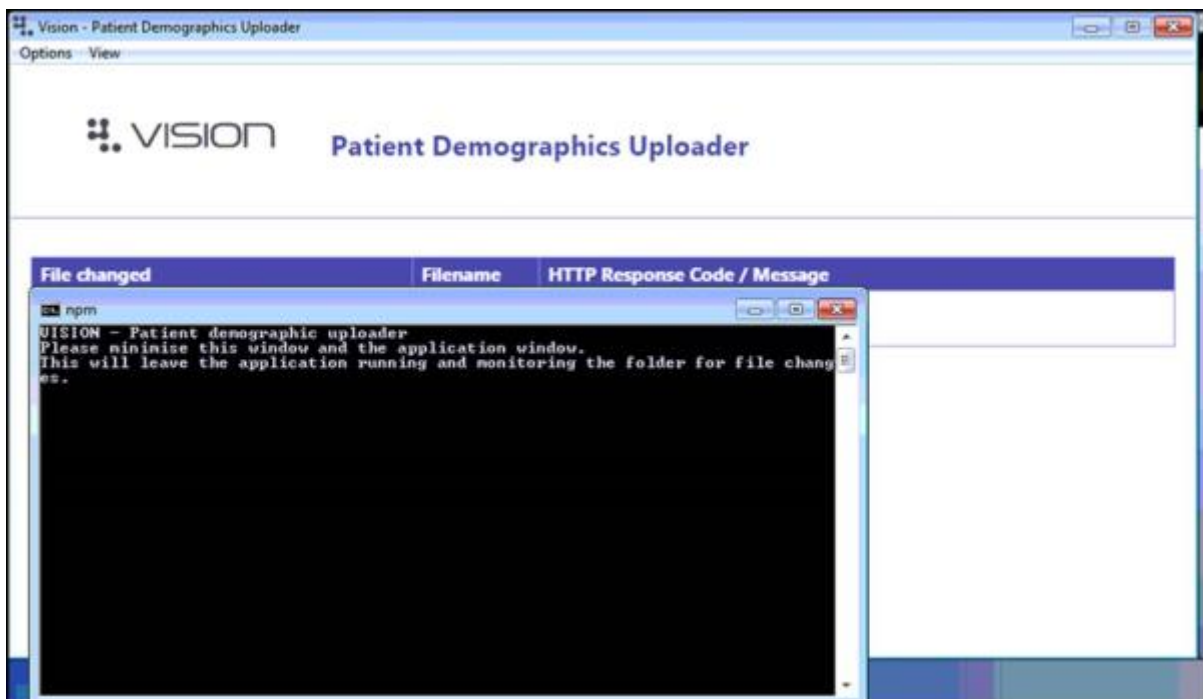
3. Open **EMIS Web**, if it is not already open and select **Reporting – Population Reporting**:

4. Double click the **INPS** or **Vision** folder and the **INPS/Vision – Patient Report** displays:

5. Select **Run** .

6. Once the report completes, select **View Results**.
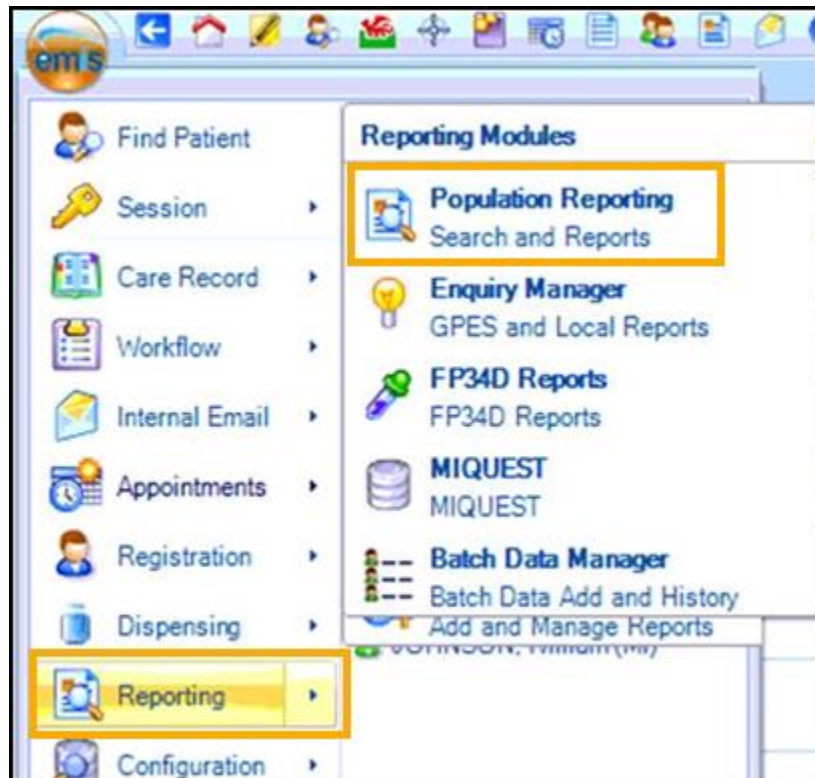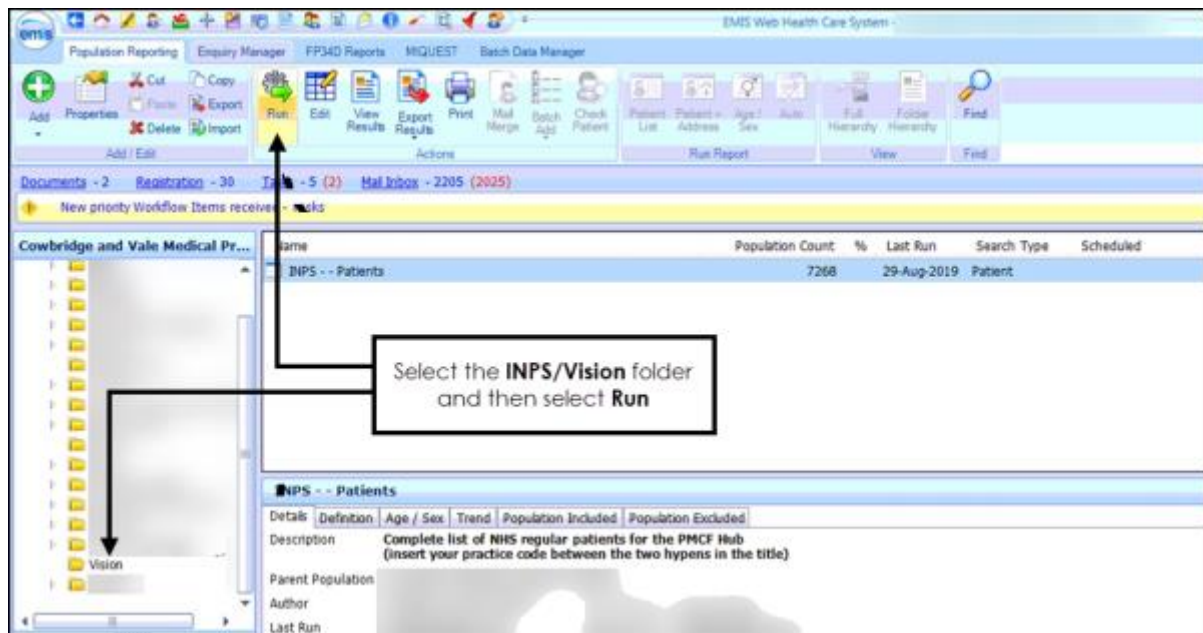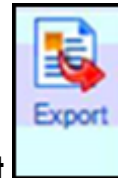
7. The **INPS - Patients** tab displays, select **Export**.

8. The **Export Report** screen displays, select **CSV**:

Export Report	X
Export format	
⚪ Excel 🔘 CSV ⚪ HTML ⚪ PDF	
☐ Exclude report header	
☐ Replicate column headers	
☐ Override hidden patients where possible	
OK Cancel	
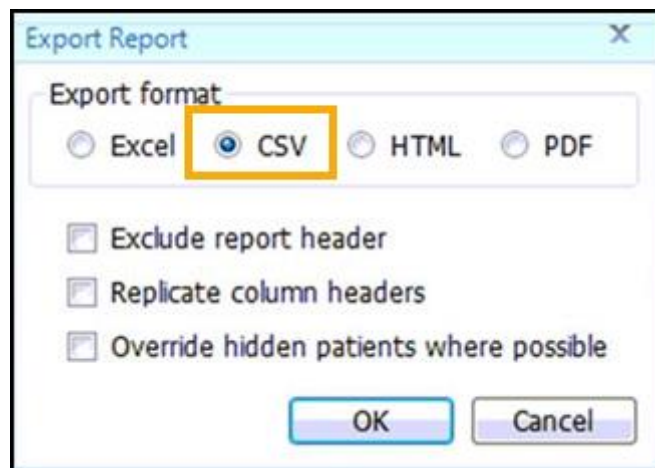
9. Select **OK**.

10. The **Save As** screen displays, navigate to
    C:\Vision\vision_upload\upload_files and double click on any existing
    report in this folder to overwrite it.

11. The **Confirm Save As** screen displays, select **Yes** to confirm.

12. The upload of your patient demographic starts. This takes approximately 15 minutes to complete, you can view the process by selecting **Vision** from your task bar, today's date, time and the response code of **Waiting** should display, this updates to **OK** once successfully completed:
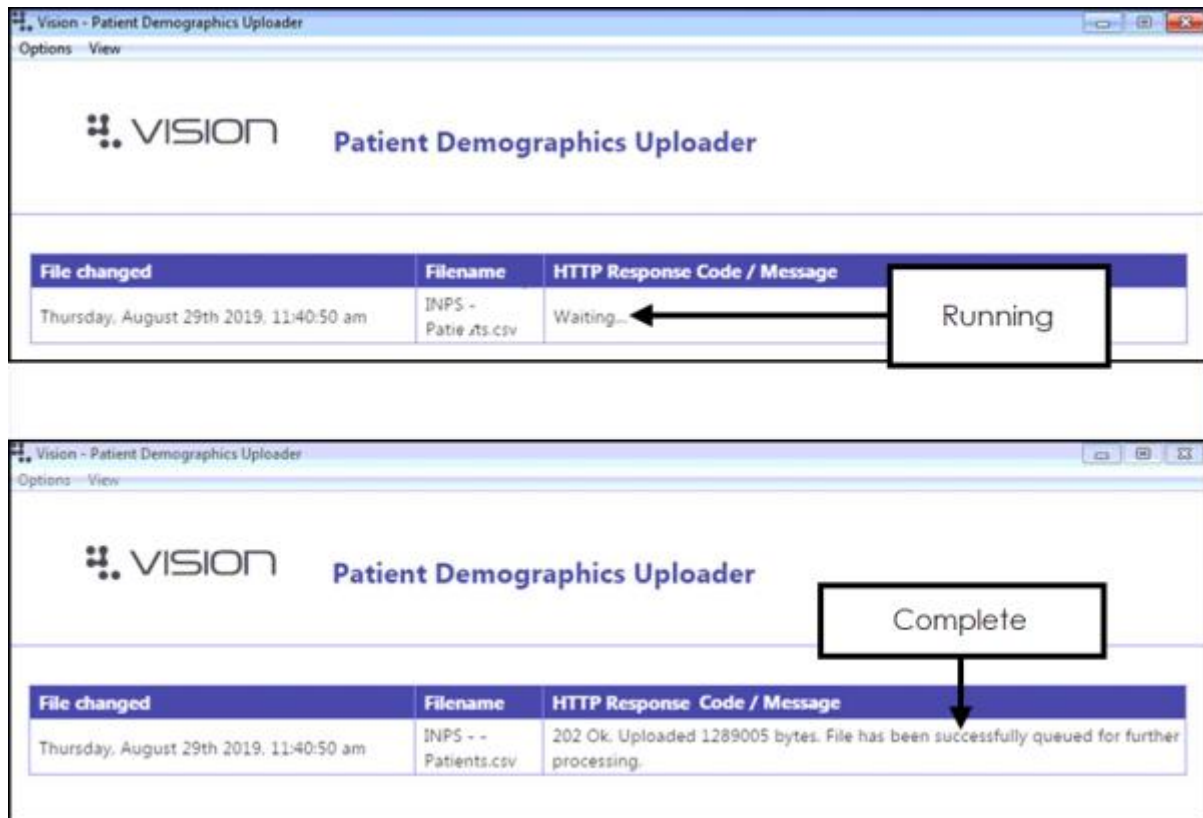
13. Once the upload successfully completes, close the **Vision - Patient Demographic Uploader** and **npm** screens.

Once the file exports the **Vision Client** automatically uploads it to the central system and processes your patient demographics.

✎ **Note** - **EMIS** can be used during the upload process as it happens in the background.

ℹ **Important** - If a **No connection to Vision** message displays, please contact the Cegedim Healthcare Solutions **Helpdesk** on the usual number.

Upgrading from V360 Appointments to Appointments

What do I have to do?

In order to prepare your existing books for the upgrade, the following steps should be taken:

Clear your Clipboard

Any appointments that are currently on your clipboard are lost during the upgrade, you should therefore:

- Remove any appointments that are no longer required, or
- If the appointments are required, or under query, create a temporary session within the appointment books and move these appointments into this session. This retains any information without you having to copy it all down.

Important – Do not advise the patient of the new appointment date/details as this is a temporary holding area only.

Release all Held Slots

The mechanism for holding slots cannot be upgraded, you therefore need to complete the following steps:

1. Release any **Held** slots and replace them with a **Special Booking** of '*Slot held by 'enter your name here*''.

2. Once the upgrade is complete, update the **Special Booking** slots created to **Held** slots within **Appointments**.

Appointments

Things to consider:

- **Filters/Views** – The upgrade process loses all your existing **Vision 3 Appointments** views and filters, it is a good time to look at the filters and views you have, those you use and those you want to make a note of to recreate in **Appointments**.

How do I use Appointments?

Appointments is an intuitive application, but is fully supported via the:

- Appointments Help Centre, complete with Getting Started topics and short video tutorials.

- **Free eLearning modules**, log in, select **All Courses** and simply search for **Appointments**, see The Learning Zone for details.

- Using Appointments in a Shared Care Setting – Available from http://help.visionhealth.co.uk/appointments_new/Content/D_Full_Help /Shared_Care/VAP_in_Shared_Care_Setting.htm

Organisational Services

User accounts for **Appointments** in a shared care setting are managed in **Organisational Services**, part of **Vision360**.

The link and log in details were provided as part of your shared care go live.

User management:

- **Adding a Shared Care User** on page **14**

- **Resetting a Password for a Shared Care User** on page **18**

- **Unlocking a Shared Care User's Account** on page **20**

- Inactivating a User:

  http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Organisational_Services/Managing_User_Accounts/Inactivate_User.htm

Services

- For details on viewing and maintaining data sharing agreements between organisations, see Service Overview:

  http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Organisational_Services/Service_Management/Service_Management.htm

Audit Trail

- For details on viewing user and patient activity, see Audit Viewer:

  http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Audit_Viewer/Audit_Viewer.htm
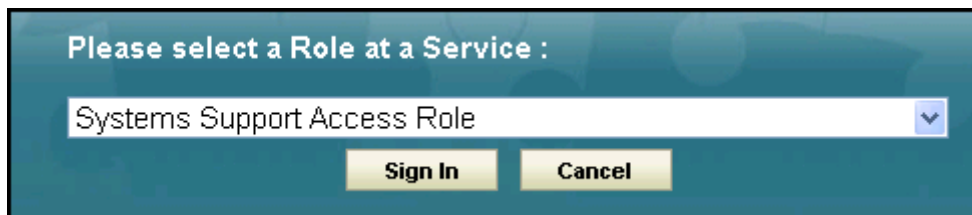
Adding a Shared Care User

In order to use **Appointments** in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

To create a user in **Organisational Services** and then add them to a service:

1. Open your browser and access the **Vision360** using the URL provided by the **Cegedim Healthcare Solutions** implementation team.

2. Login to **Vision360** by entering your user name and password and select **Sign In.**

Sign in with your Vision ID

| debbie.cuthbert@inps.net | •••••••••| Sign In |

3. From **Please select a Role at a Service**, select **Systems Support Access Role**:

Please select a Role at a Service :

Systems Support Access Role

Sign In   Cancel

4. The **Vision 360 Clinical Portal** home screen displays, select

    Organisational Services .

5. The **Service Details** screen displays.

6. Check to see if the user already exists, see Search for a User for details:

    http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Organi sational_Services/Searching_Users_Services_Sharing_Agreements.htm

    - If the user exists, you can simply add the service required, see **Add a User to a Service** on page **17**

    - If the user does not exist, they must be added, see **Create a User in Organisational Services** on page **14**
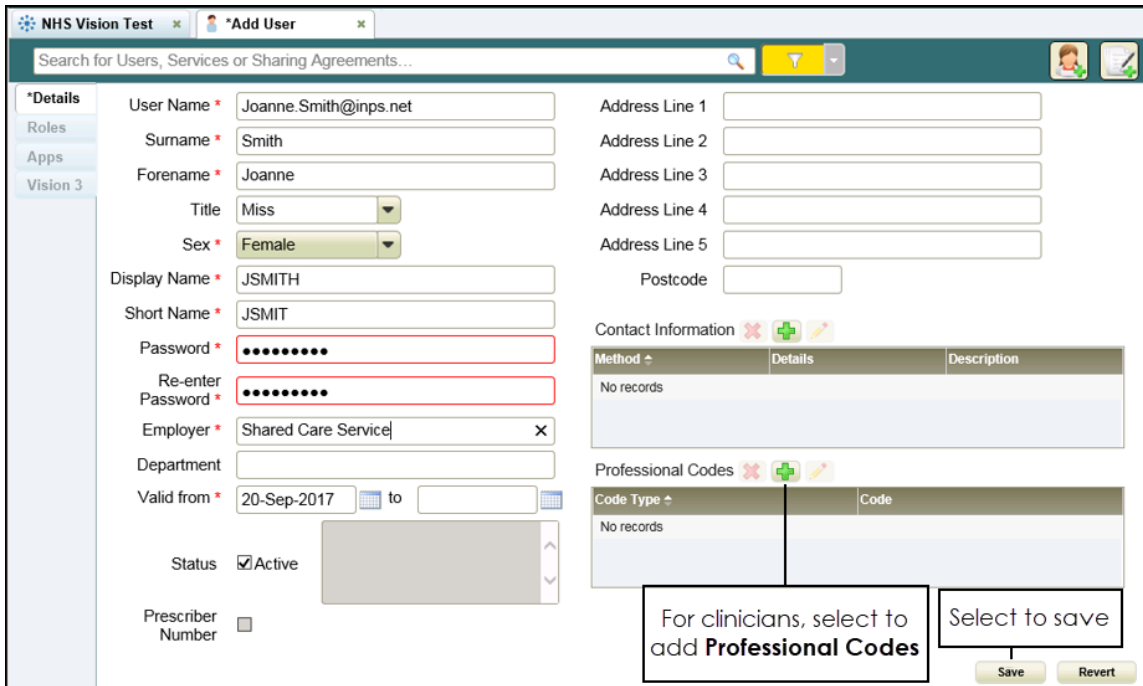
Now complete the following as required:

Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to, see Search for Service for details:

    http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Organi sational_Services/Managing_User_Accounts/Allocating_Services_Roles.h tm

2. Select **Create User** and the new **Add User** tab displays:

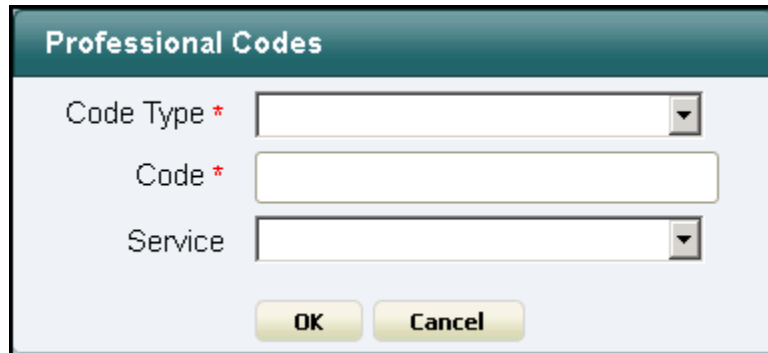3. Enter the new users details, items marked * are mandatory fields.

- The password must be a minimum of 6 characters and contain characters from at least three of the following categories:

    - Upper case

    - Lower case

    - Numbers

    - Non-alphanumeric characters: ~!@#$%^*_-+=`|\(){}[];'.?/

    - No spaces at the beginning or end of the password

    - The password must not contain three or more consecutive characters (case insensitive) from the user name, forename or surname.

4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:
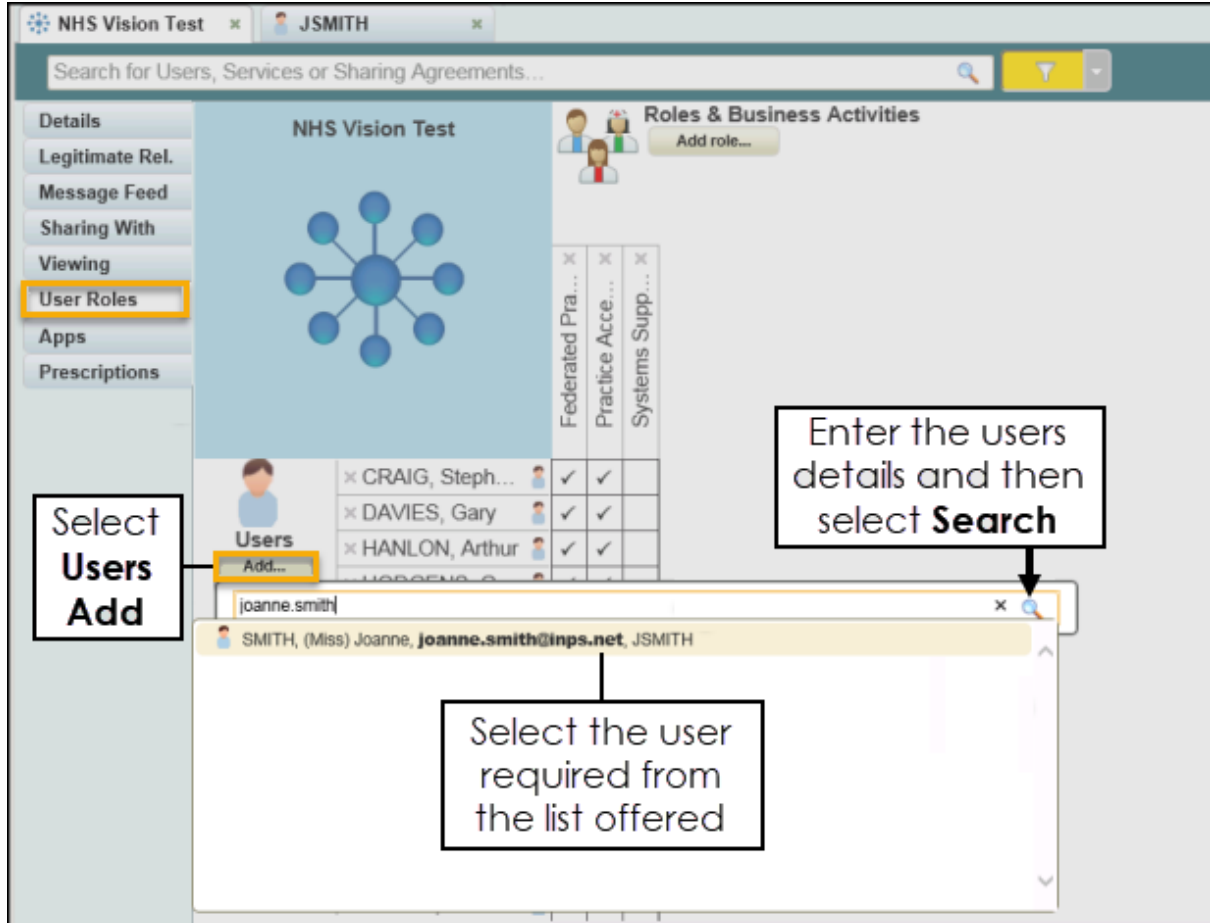
Adding Professional Codes

a. From **Professional Codes**, select **Add** .

b. The **Professional Codes** screen displays:

Professional Codes

Code Type *		▼
Code *		
Service		▼

OK   Cancel

c. Complete as required:

- **Code Type** - Select the type of code to record.
- **Code** - Enter the code.
- **Service** - Select from the list of services available for this user.

d. Select **OK**.

5. Select **Save** .

Add a User to a Service

1. Open the **Shared Care Service** view, if you have just created the user, this is still open at the top of your screen.

2. Select **User Roles**:

3. Select **Users Add....**

4. Enter the user's details in the search bar and select **Search** .

5. Select the user from the results.

6. The user is assigned to the shared care service.

7. Tick next to the user's name under the appropriate heading, to allocate their role.

Note - To remove rights from a user, simply untick the box.
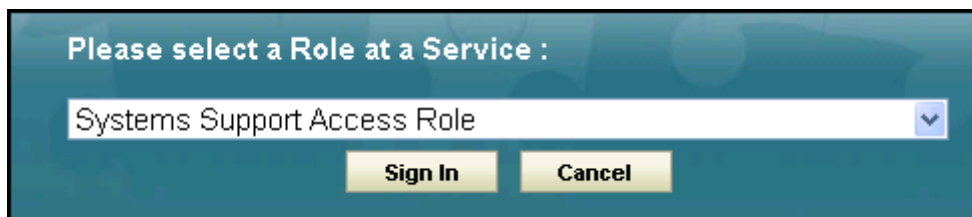
Resetting a Password for a Shared Care User

To reset a password for a shared care user:

✏️ **Note** - If you are not a system manager, you can only reset your own password.
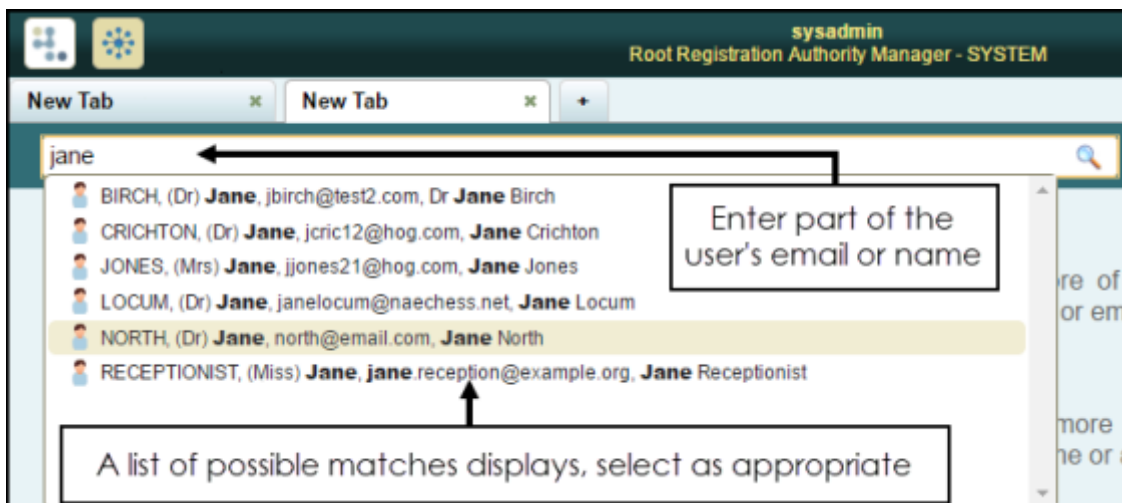
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1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the **Cegedim Healthcare Solutions** implementation team.

2. Login to **Vision360** by entering your user name and password and select **Sign In**:

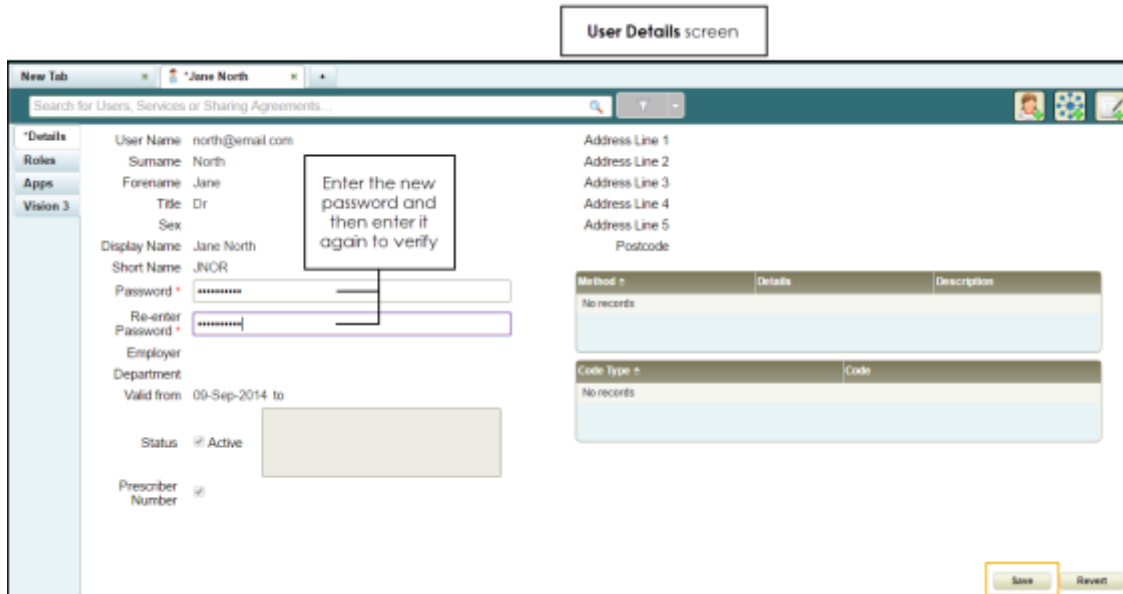3. Select your **Systems Support Access Role**:

4. Select **Organisational Services**

5. In the search box, type part of the locked user's name or email and select **Search**

6. All matching results display, select the user required.

7. The **Edit User** screen displays with the **Details** tab selected.

8. In **Password**, enter a new password.

9. In **Re-enter Password** enter the new password again to confirm:

10. Select **Save**.

Note - The following password validation rules apply when resetting a user's password:

- Minimum of 6 Characters
- Contain Upper and Lower case Letters
- Contain Numbers
- Contain Non-alphanumeric symbols (for example & $ % etc)
- Password from the last 5 passwords cannot be used
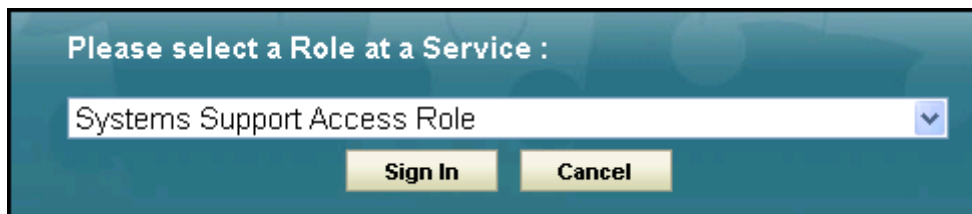
Unlocking a Shared Care Account

After three unsuccessful attempts at logging in, you are locked out of **Appointments** and the locked out message displays.
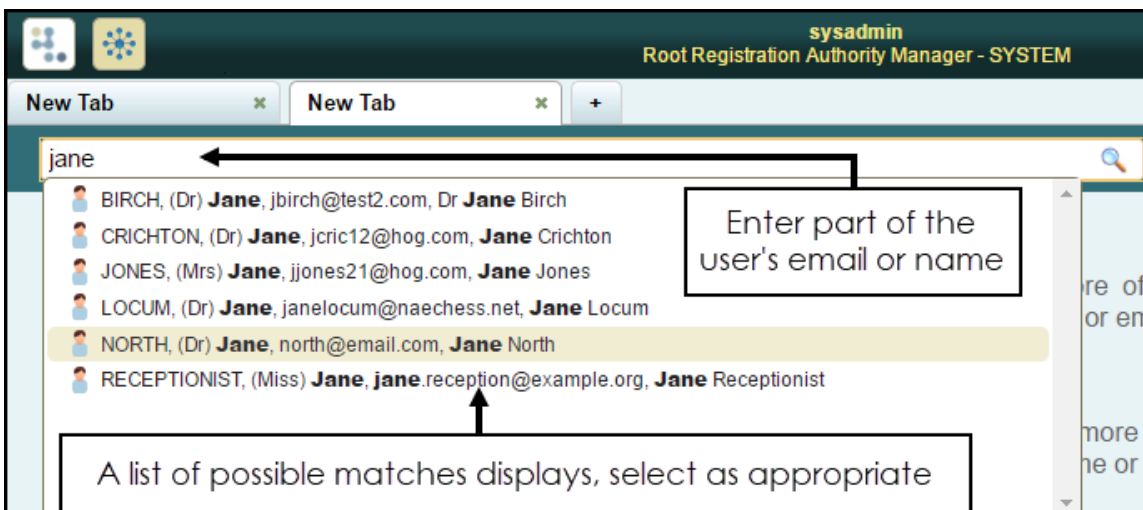
To unlock a shared care account:

1. Open your browser and access **Vision360** using the URL provided by the **Cegedim Healthcare Solutions** implementation team.

2. Login to **Vision360** by entering your user name and password and select **Sign In**:

3. Select your **Systems Support Access Role**:

4. Select **Organisational Services** .

5. In the search box, type part of the locked user's name or email and select **Search** :
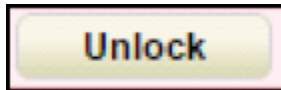

6. All matching results display, select the user required.

7. The **Edit User** screen displays with the **Details** tab selected.

8. The **This account has been locked after three failed access attempts** message displays at the top of the **Details** screen:

9. Select **Unlock** .

See **Resetting a Password for a Shared Care User** on page **18** and Organisational Services for full details:

http://help.visionhealth.co.uk/SharedCare/Content/G_Full_Help/Orga nisational_Services/Organisational_Services.htm

Leaving the Shared Care Service

The following action should be taken when leaving the Shared Care Service:

- **Patient** - When a patient transfers out of your practice, if you are part of a Shared Care Service you should check that they do not have any future **Appointments** booked, this can be done from their **Patient Details View**. If they do, they should be cancelled and the patient notified.

> **Note** - If the patient is moving to a practice within the same services, their appointments must still be cancelled and then rescheduled by their new practice.

- **Practice** - If a practice leaves a Shared Care Service, any appointments they have with the service must be cancelled.