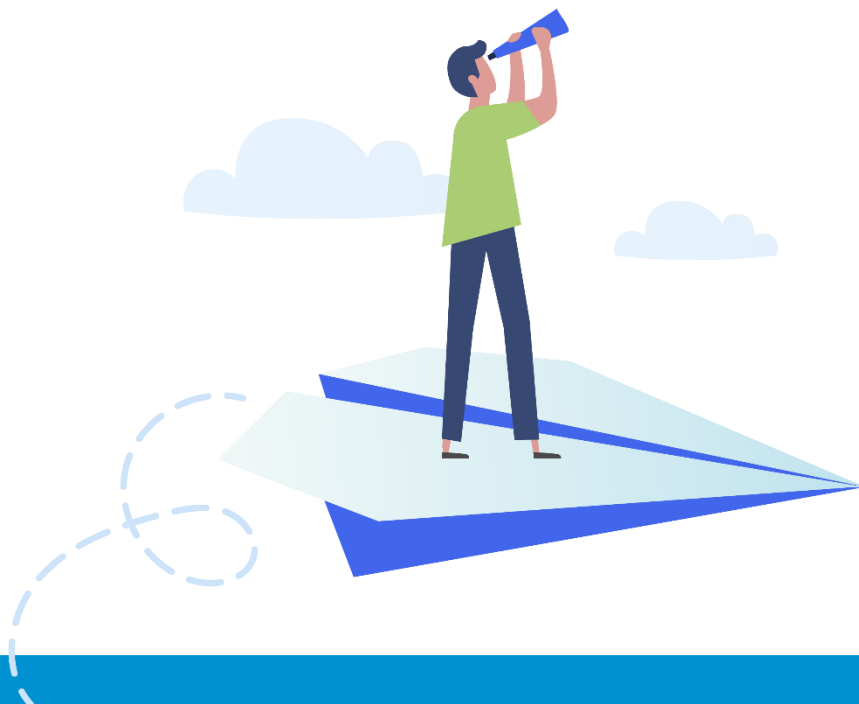




Vision 3 Release Guide DLM 820

Version 1.7

9th November 2022



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Vision Release DLM 820

Summary of Changes

May 2022

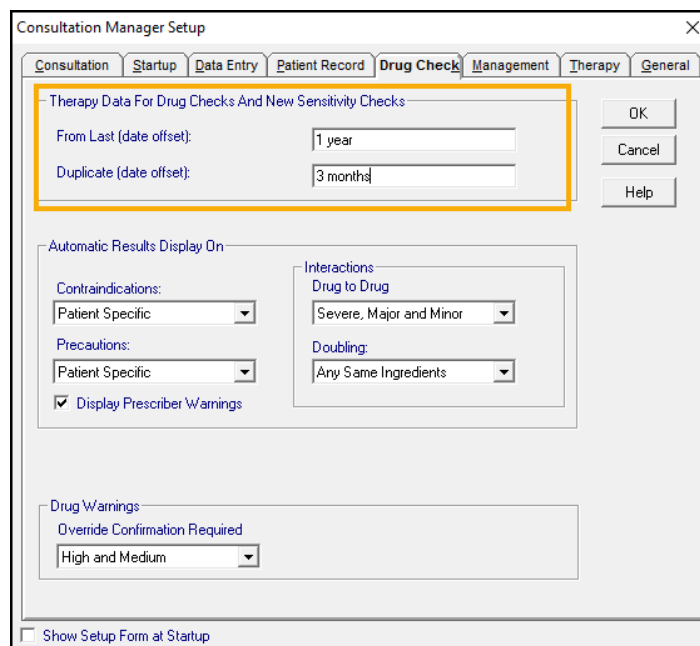
All Countries

Consultation Manager

Vision 3 release **DLM 820** contains the following new features and improvements for **Consultation Manager**:

- **Drug Checks:**
 - **Drug Doubling** - You can now differentiate **Duplication** offset dates from your **Contraindication**, **Interaction** and **Precaution** offset dates. From Consultation Manager, select **Consultation - Options - Setup - Drug Check**, under **Therapy Data for Drug Checks and New Sensitivity Checks**, there are now two date offset options:
 - **From Last (date offset)** - Defaults to 1 year, update as required.
 - **Duplicate (date offset)** - Defaults to 3 months, update as required.

 **Note** - In **England, Wales** and **Northern Ireland**, these cannot be less than 7 days, in **Scotland** they cannot be less than 30 days, if you try to update less than your country minimum, an error message displays.



Consultation Manager Setup

Consultation Startup Data Entry Patient Record **Drug Check** Management Therapy General

Therapy Data For Drug Checks And New Sensitivity Checks

From Last (date offset): 1 year

Duplicate (date offset): 3 months

OK
Cancel
Help

Automatic Results Display On

Contraindications: Patient Specific

Precautions: Patient Specific

Display Prescriber Warnings

Interactions: Drug to Drug

Severe, Major and Minor

Doubling: Any Same Ingredients


Drug Warnings

Override Confirmation Required

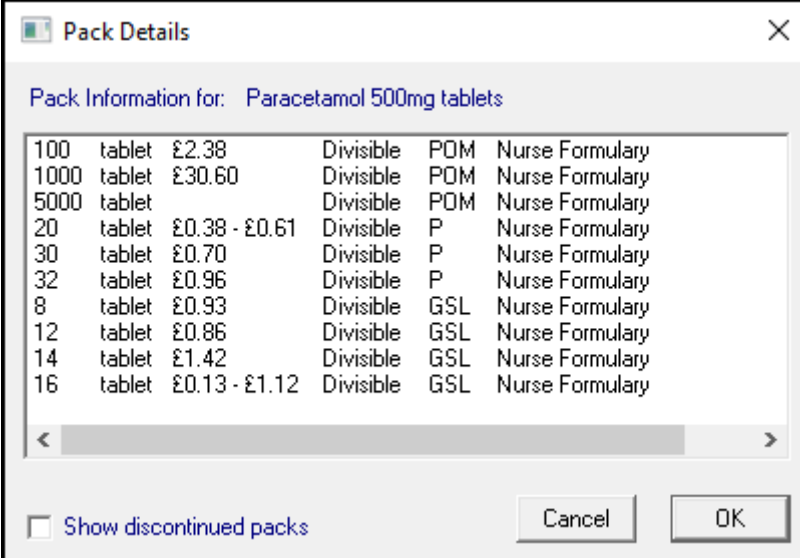
High and Medium

Show Setup Form at Startup

- **Prescribing:**

- **Pack Details Order** - When you select **Pack Details**  from a **Therapy** screen, the display order is now:

- **Prescription Only Medication (POM)** - Smallest pack size first.
- **Pharmacy can prescribe (P)** - Smallest pack size first.
- **General Sales (GSL)** - Smallest pack size first:

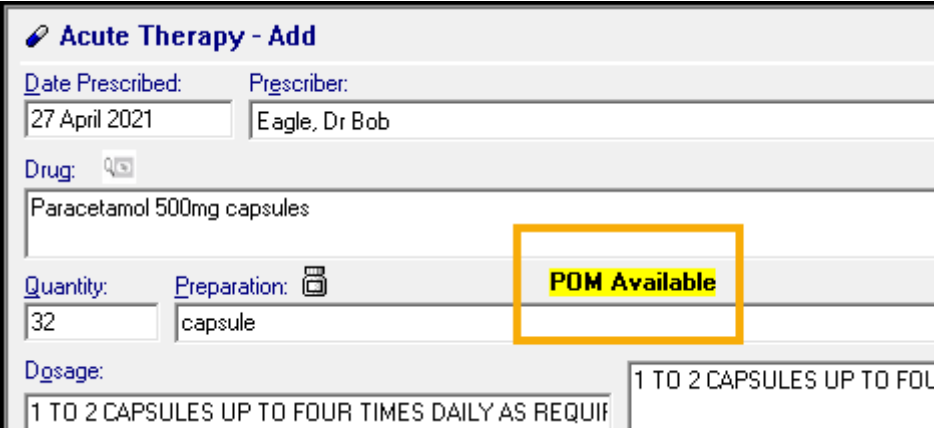


| Pack Information for: Paracetamol 500mg tablets | | | | | | |
|---|--------|---------------|-----------|-----|-----------------|--|
| 100 | tablet | £2.38 | Divisible | POM | Nurse Formulary | |
| 1000 | tablet | £30.60 | Divisible | POM | Nurse Formulary | |
| 5000 | tablet | | Divisible | POM | Nurse Formulary | |
| 20 | tablet | £0.38 - £0.61 | Divisible | P | Nurse Formulary | |
| 30 | tablet | £0.70 | Divisible | P | Nurse Formulary | |
| 32 | tablet | £0.96 | Divisible | P | Nurse Formulary | |
| 8 | tablet | £0.93 | Divisible | GSL | Nurse Formulary | |
| 12 | tablet | £0.86 | Divisible | GSL | Nurse Formulary | |
| 14 | tablet | £1.42 | Divisible | GSL | Nurse Formulary | |
| 16 | tablet | £0.13 - £1.12 | Divisible | GSL | Nurse Formulary | |

Show discontinued packs

Cancel OK

- **Prescription Only Medicine Warning** - If there is a **Prescription Only Medicine (POM)** version of a selected P/GSL product, to ensure cost-effective prescribing, **POM Available** displays above **Preparation**:



Acute Therapy - Add

Date Prescribed: 27 April 2021 Prescriber: Eagle, Dr Bob

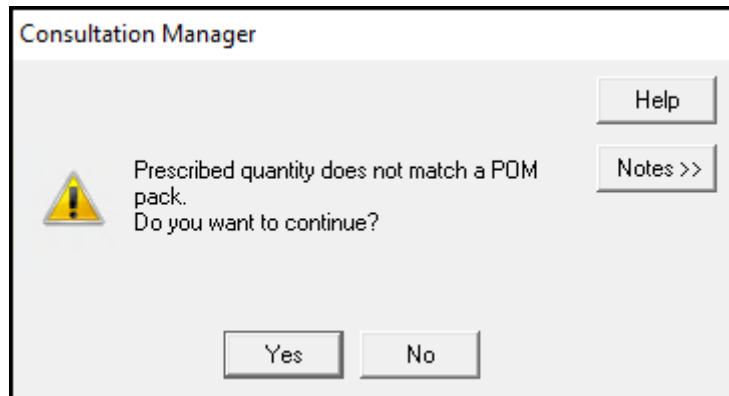
Drug: Paracetamol 500mg capsules

Quantity: 32 Preparation: capsule

Dosage: 1 TO 2 CAPSULES UP TO FOUR TIMES DAILY AS REQUIRED

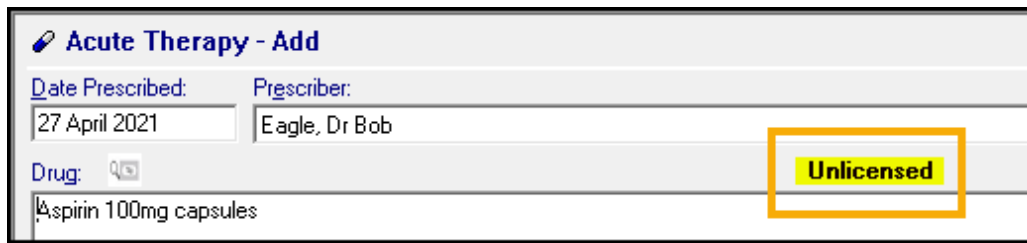
POM Available

If you select a POM but select a quantity that does not match a POM pack size, the following warning displays:

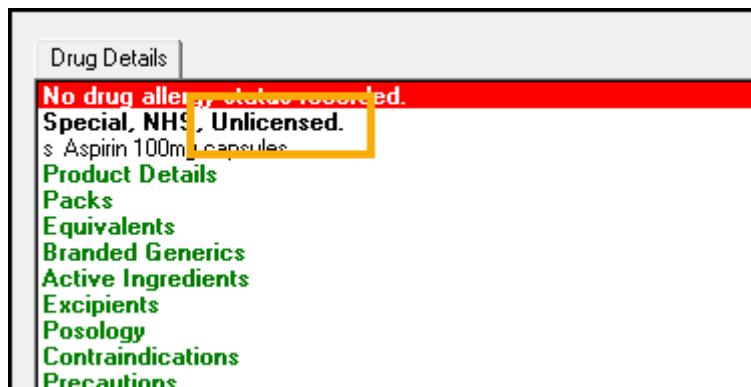


Select **Yes** to continue or **No** to reselect the pack size.

- **Unlicensed Medicines Warning** - If you select an unlicensed medicine from a **Therapy - Add** screen, an **Unlicensed** warning displays:



This warning also displays in the **Drug information** section of the **Select Drug** screen:



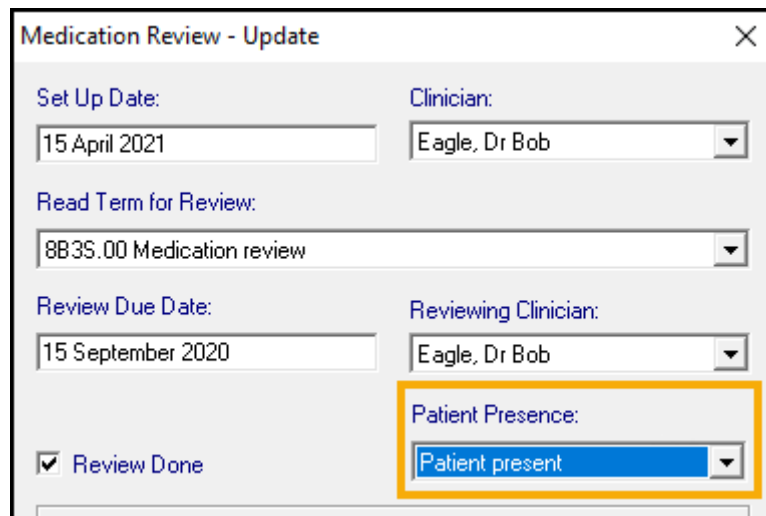
This includes items with:

- No Licensing Authority.
- Unknown Licensing Authority.
- No Licensed Actual Medical Product (AMP).



- **Medication Reviews:**
 - **Individual Item Reviews** - You can now set a reminder to review individual medication from any **Therapy - Add** screen.

 See **Individual Item Medication Reviews** on page 19 for details.

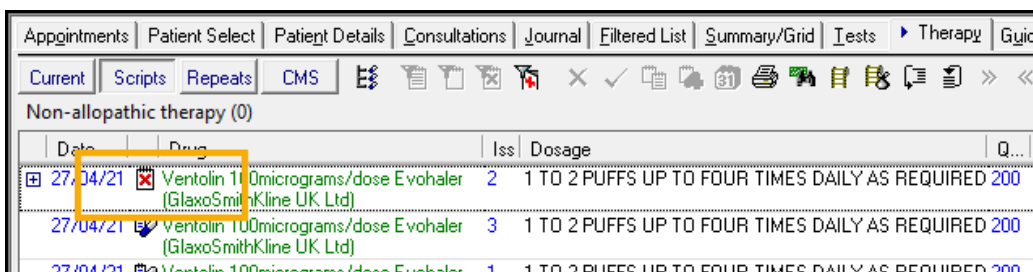
- **Patient Presence** - The **Medication Review** screen has been updated to include a **Patient Presence** option. Select from the available list as appropriate:




Patient Presence defaults to **None**, but if you select **8B3x.00 Medication review with patient**, or **8B3h.00 Medication review without patient** in **Read Term for Review** it automatically updates.

- **Medication Review Due/Overdue** - The symbol alongside a due or overdue **Medication Review** has been updated:
 - **Medication Review Due** - The date indicator displays in yellow .
 - **Medication Review Overdue** - The date indicator displays in red .

- **Deleting/Canceling Repeat Issues** - If appropriate, you can now delete or cancel any issue of a repeat master. If the issue selected is not the latest, a message displays to warn you, simply **Yes** to continue and the **Cancel Prescription Reason** screen displays in the usual way. If the issue selected is the latest, it is removed from the list, if it is not the latest, it displays as cancelled:



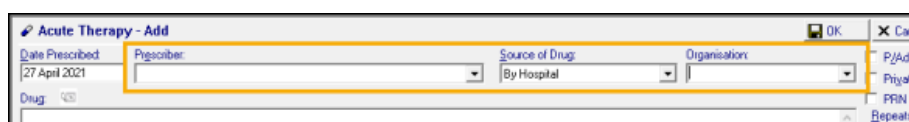
| Date | Drug | Iss | Dosage | Q... |
|----------|---|-----|---|------|
| 27/04/21 | Ventolin 100micrograms/dose Evohaler (GlaxoSmithKline UK Ltd) | 2 | 1 TO 2 PUFFS UP TO FOUR TIMES DAILY AS REQUIRED | 200 |
| 27/04/21 | Ventolin 100micrograms/dose Evohaler (GlaxoSmithKline UK Ltd) | 3 | 1 TO 2 PUFFS UP TO FOUR TIMES DAILY AS REQUIRED | 200 |
| 27/04/21 | Ventolin 100micrograms/dose Evohaler | 1 | 1 TO 2 PUFFS UP TO FOUR TIMES DAILY AS REQUIRED | 200 |

 **Note** - If this is an electronic prescription, you are warned that the cancellation is transmitted automatically.


- **Printed Prescriptions** - Your financially responsible organisation now prints on prescriptions to ensure prescribing costs are passed on to the appropriate organisation.
- **Source of Drug** - There are two new out of practice entries available to select from the **Source of Drug** list:
 - By Pharmacy.
 - By Federation.
- **Record medication issued by other organisations:** - When you add a medication and select **Source of Drug** as outside the practice:

You have two new options:

- **Prescriber** - This becomes a free text option to record the prescriber of the medication if required. A list is created as you use this option.
- **Organisation** - This is a free text option to record the organisation of the prescriber if required. A list is created as you use this option.




| Date Prescribed | Prescriber | Source of Drug | Organisation |
|-----------------|------------|----------------|--------------|
| 27 April 2021 | | By Hospital | |

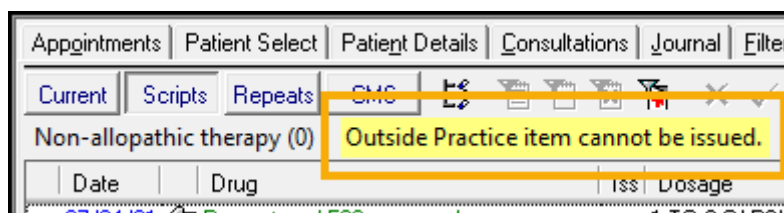
 **Remember** - You cannot issue against a Repeat Master prescribed by an outside source.

- **Non-allopathic Medication**- You can now record any non-allopathic medication your patient is taking. This then displays in the **Non-allopathic therapy** list available from the **Therapy** tab.



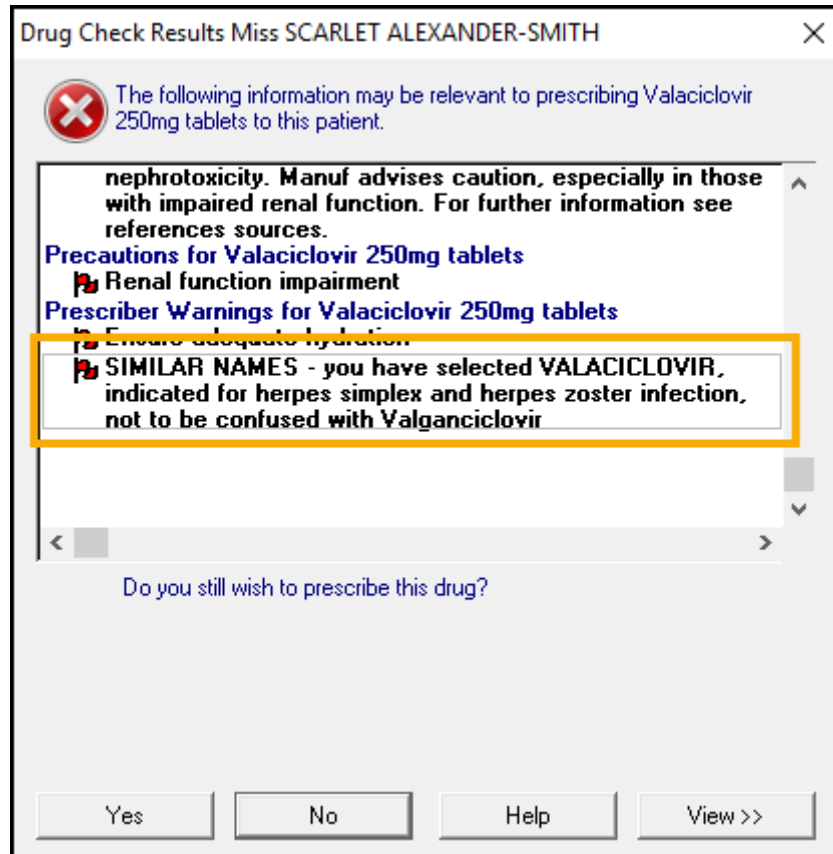
See [Non-allopathic Medication](#) on page 21 for details.

- **Printing Out of Practice Prescriptions** - Print  is no longer enabled when you add an out of practice medication. From the Therapy tab, if you highlight an out of practice item, an **Outside Practice item cannot be issued** alert displays on the Therapy toolbar:



- **Updating an Out of Practice Medication** - Once added, you can no longer:
 - Update an **Out of Practice** item to an **In Practice** item.
 - Update a **Private prescription** to an **NHS prescription**.

- Similarly Named Drug Warning** - If you select a medication that is commonly confused with another medication, based on the list of published by the MHRA in their Drug Safety Updates, a detailed warning now displays in the **Drug Check Results** screen, for example:

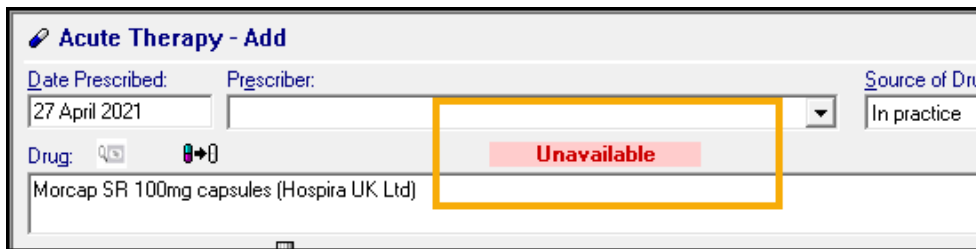
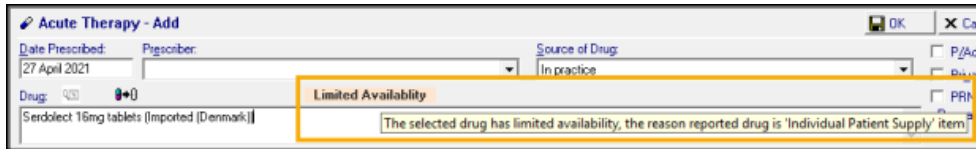


Select **Yes** to continue or **No** to change the medication you are prescribing.

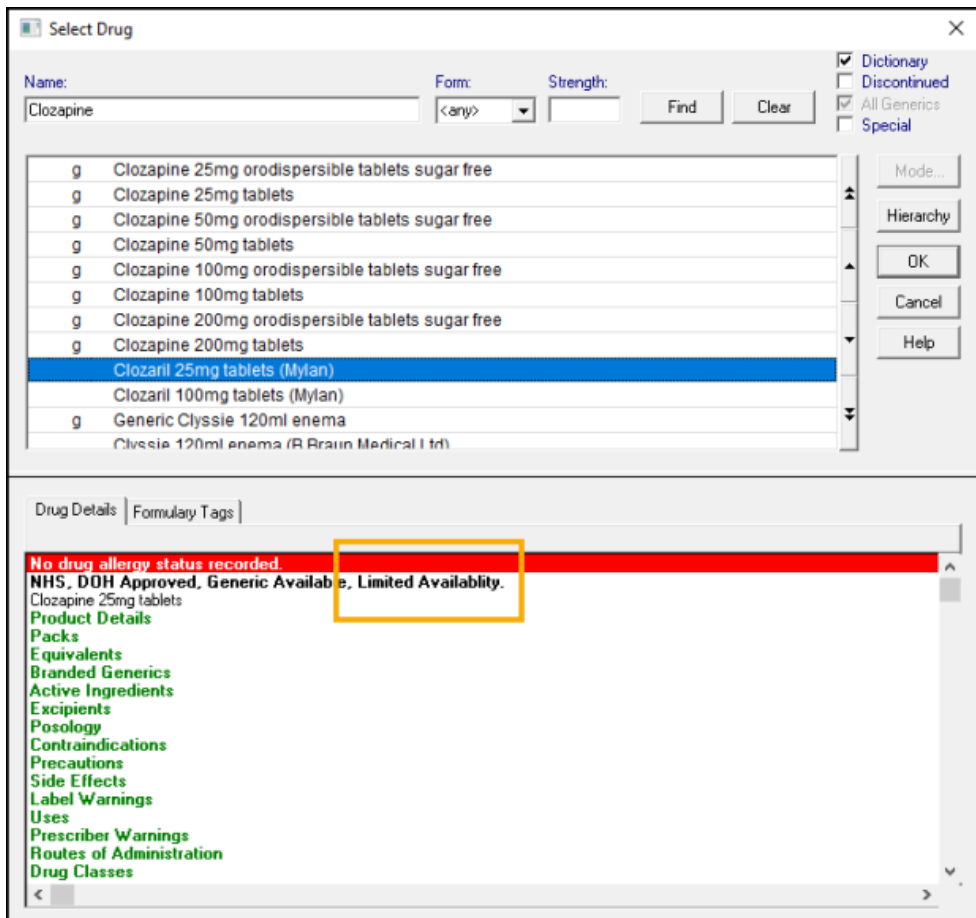


Training Tip - **Prescriber Warnings** only display if you have a tick in **Consultation Manager - Consultation - Options - Setup - Drug Check - Prescriber Warnings**.

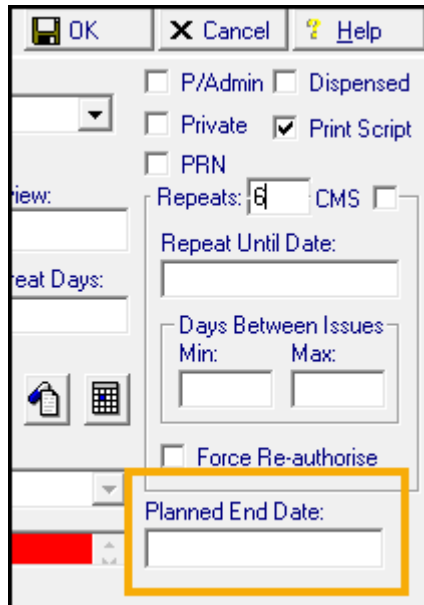
- Medication Availability Restricted** - If you select to prescribe an item that is highlighted as **Availability Restricted** within the DM+D, the following warnings display:
 - Therapy - Add - Limited Availability/Unavailable** displays above the **Drug** details, hover over the warning to view further details where available:



- Select Drug - Limited Availability** displays in the information section of the screen:




- **Planned End Date** - If you plan to stop supplying a medication at a specific time, or a medication prescribed elsewhere has a suggested end date, you can enter that date here:



The image shows a software dialog box with the following fields and options:

- Buttons: OK, Cancel, Help
- Checkboxes: P/Admin, Dispensed, Private, Print Script (checked), PRN, CMS
- Repeats: 6
- Repeat Until Date: [Empty field]
- Days Between Issues: Min: [Empty field], Max: [Empty field]
- Force Re-authorise: [Unchecked checkbox]
- Planned End Date: [Empty field, highlighted with a yellow box]

 **Note** – This date is for reference purposes only.

Registration

Vision 3 release **DLM 820** contains the following new features and improvements for **Registration**:

- **Test patient Record** - You can now mark a patient as a **Test Patient** within **Registration**. This enables you to create a patient that you can easily exclude from your statistics and reports allowing you to use them for practice and testing purposes. Patients with a **Test Patient** status are not included in **Clinical Audit**.

 See [Creating and Using a Test Patient](#) on page **23** for details.

- **Personal Tab** - The following new features and improvements are now available from the **Personal** tab in patient's **Registration** record:
 - **Title** - A patient title is now optional, update if required.
 - **Gender and Gender Information** - To assist in capturing gender preference:
 - **Gender** - Defaults to **None**, optionally can be updated to **Female**, **Male** or **Other**.
 - **Gender Information** - Defaults to blank, enter free text if appropriate to capture gender preference.
 - **Mother's Birth Surname** - You can optionally enter the patient's mother's maiden name here.
- **Registration tab - Usual GP** is no longer populated by default when a patient is registered, it is now an optional setting.
- **Communication** - A new **Preferred Contact** option is available, tick to indicate an entry is the patient's preferred method, the preferred contact is indicated by an asterisk:

| | |
|---|--|
| Phone Number: <input type="button" value="Add to Address"/> <input type="button" value="Add to Patient"/> | Contacts for current address Contacts for patient Home* 01234 456789 Mobile 07123 45678 |
|---|--|

This information displays in:

- **Registration**
- **Consultation Manager**
- **Appointments**
- **Mail Manager**
- **Daybook**

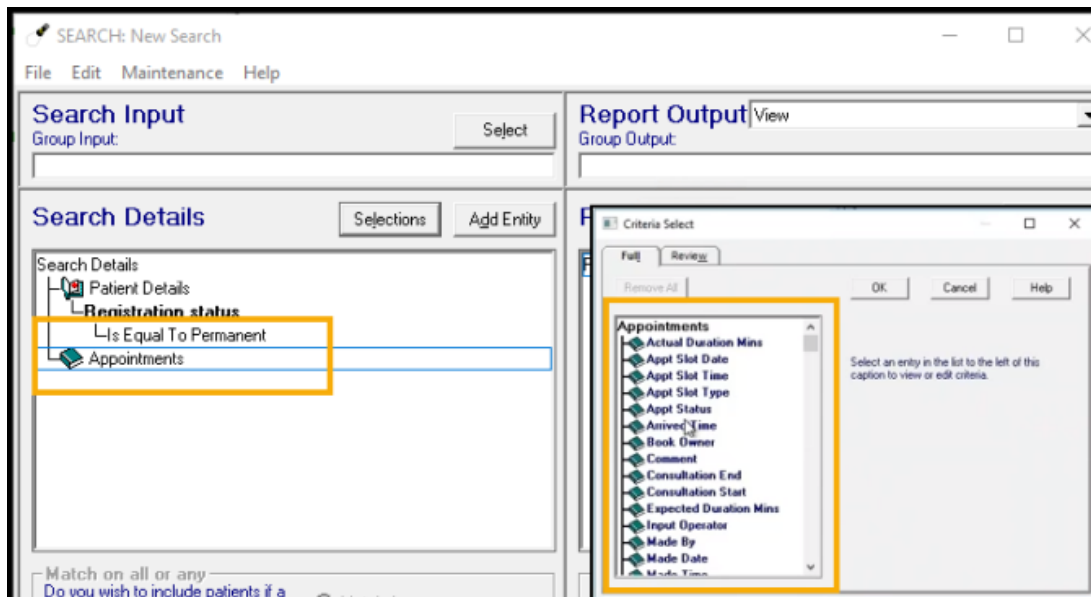
Search and Reports

Vision 3 release **DLM 820** contains the following new features and improvements for **Search and Reports**:

- **Reference Date** - There is a new **Set Reference Date** option available for ad-hoc searches. This allows you define date ranges outside of a search and then select and apply those ranges to both individual searches and batches of scheduled searches.

 See **Search and Reports Reference Date** on page **26** for details.

- **View the patient statistics of the search** - At the bottom of the **View of Patient Details** screen the number of patients returned by a search as:
 - a number,
 - a percentage of all patients, and where a filter is applied,
 - a percentage of a base cohort displays.
- **Appointments** - Within an **Ad-hoc Search**, **Appointments** is now available as a selectable entity. Once selected you can choose from the various available options to build your search:
 - Actual Duration Mins.
 - Appt Slot Date.
 - Appt Slot Time.
 - Appt Slot Type.
 - Appt Status.
 - Arrived Time.
 - Book Owner.
 - Comment.
 - Consultation End.
 - Consultation Start.
 - Expected Duration Mins.
 - Input Operator.
 - Made By.
 - Made Date.
 - Made Time.
 - Session Name.



Other Updates

Vision 3 release **DLM 820** also contains the following new features and improvements:

- **Security Update** - The **Login Retries** and **Lock out user when login failed** “retries” times options available from **Management Tools – Security - Security Settings** are reinstated.



See [Security Settings](#) in the **Management Tools** Help Centre for full details.

- **Word Processor** - A new **PATIENT_PREFERRED_CONTACT** is available as a **Mail Merge** option to include the patient's preferred contact number.



Training Tip - If the patient's preferred number is not recorded, no number is included in the letter.

- **CPRD** - The **CPRD** extract has been updated to include the **Medication Review location**.
- **THIN** - The **THIN** extract has been updated to include the **Medication Review location**.

Scotland Only

Vision 3 release **DLM 820** contains the following new features and improvements for practices based in Scotland only:

Consultation Manager

- **Prescribing:**
 - **Default Prescriber-** When a non prescribing member of staff adds, reauthorises or edits a medication, the **Prescriber** no longer automatically completes. The authorising prescriber must be selected each time.



Remember - Only unissued medication can be edited.

- **Creating an Acute prescription from a Repeat** - The **Floating Drop Target** has been updated to recognise the type of prescription issue you are dropping on to



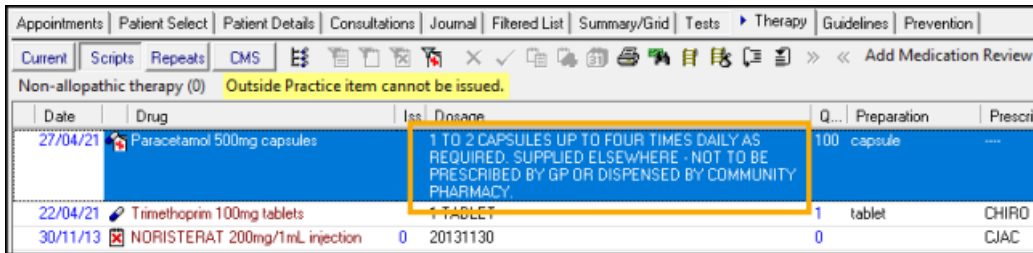
Prescription. You can now drag and drop the following:

- **Repeat issue**, to create a one off acute prescription retaining the same details as the repeat issue you are copying, or
- **Acute issue**, to create a repeat master retaining the same details as the repeat issue you are copying:



Control Panel

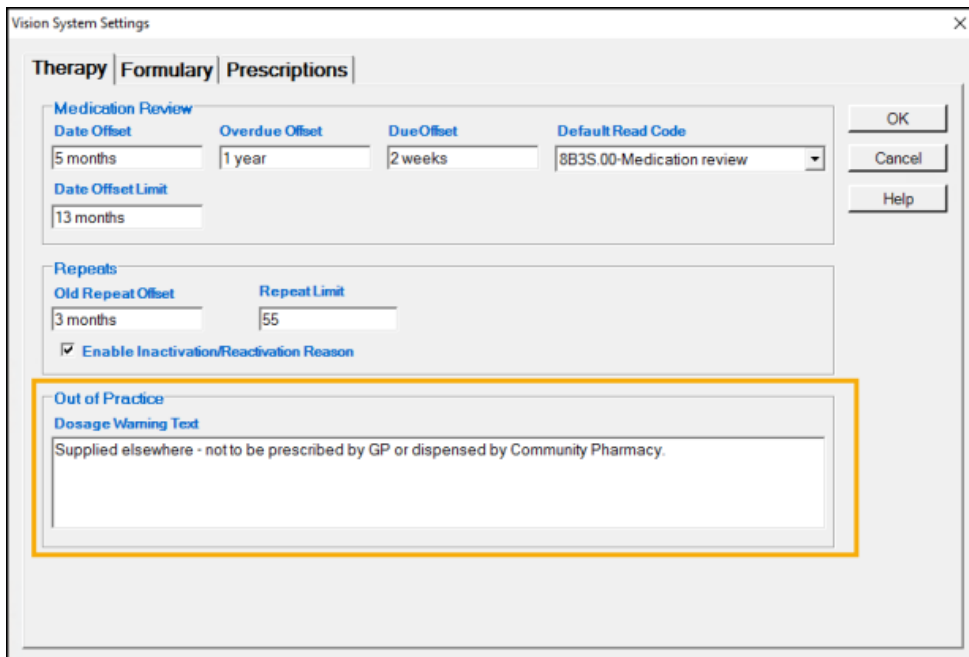
- **Settings:**
 - **Therapy** - When you record medication prescribed outside of your practice, you now have an option to display a message after the medication details, for example, '*Supplied elsewhere or not to be prescribed by GP or dispensed by community pharmacy.*' :



| Date | Drug | Iss | Dosage | Q... | Preparation | Prescrib |
|----------|--------------------------------|-----|---|------|-------------|----------|
| 27/04/21 | Paracetamol 500mg capsules | | 1 TO 2 CAPSULES UP TO FOUR TIMES DAILY AS REQUIRED. SUPPLIED ELSEWHERE - NOT TO BE PRESCRIBED BY GP OR DISPENSED BY COMMUNITY PHARMACY. | 100 | capsule | --- |
| 22/04/21 | Trimethoprim 100mg tablets | | 1 TABLET | 1 | tablet | CHIRO |
| 30/11/13 | NORISTERAT 200mg/1mL injection | 0 | 20131130 | 0 | | CJAC |

To set up this warning:

1. From **Control Panel - File Maintenance - Settings**, select **Therapy**:



Vision System Settings

Therapy | Formulary | Prescriptions

Medication Review

Date Offset: 5 months | Overdue Offset: 1 year | Due Offset: 2 weeks | Default Read Code: 8B3S.00-Medication review

Date Offset Limit: 13 months

Repeats

Old Repeat Offset: 3 months | Repeat Limit: 55

Enable Inactivation/Reactivation Reason

Out of Practice

Dosage Warning Text

Supplied elsewhere - not to be prescribed by GP or dispensed by Community Pharmacy.

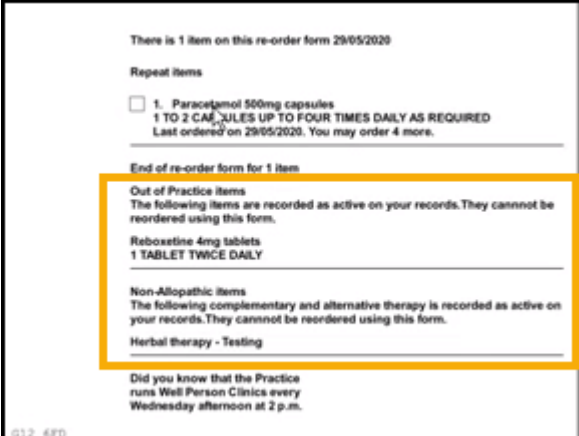
OK | Cancel | Help

2. In **Out of Practice - Dosage Warning Text**, enter the warning you want to display.
3. Select **OK** to save.

- **Re-order forms** - Medication items recorded as **Out of Practice** can now be included on the **Re-order** form.

To set up the items included on the Re-order form:

1. From **Control Panel - File Maintenance - Settings - Therapy**, select **Prescriptions**.
2. From **Reorder**, select:
 - **Include Out of Practice** - Tick to include drugs prescribed outside of your practice on the re-order form.
 - **Include Non-Allopathic** - Tick to include non-allopathic drugs prescribed on the re-order form.
3. If you have selected to include the relevant items, enter the text to display above the relevant list:
 - **Out of Practice Guidance Text** - Enter the text to print above the out of practice list of items.
 - **Non-Allopathic Guidance Text** - Enter the text to print above the non-allopathic list of items.
4. Select **OK** to save.



There is 1 item on this re-order form 29/05/2020

Repeat items

1. Paracetamol 500mg capsules
1 TO 2 CAPSULES UP TO FOUR TIMES DAILY AS REQUIRED
Last ordered on 29/05/2020. You may order 4 more.

End of re-order form for 1 item

Out of Practice items
The following items are recorded as active on your records. They cannot be reordered using this form.

Reboxetine 4mg tablets
1 TABLET TWICE DAILY

Non-Allopathic items
The following complementary and alternative therapy is recorded as active on your records. They cannot be reordered using this form.

Herbal therapy - Testing

Did you know that the Practice runs Well Person Clinics every Wednesday afternoon at 2 p.m.

012 480

Individual Item Medication Reviews

If you want to enter a date to review individual medication(s), you can now add an **Item Review** date. The review date displays in a **Review** column on the **Therapy** tab and highlights in yellow when due and red when overdue.

Adding an Individual Item Medication Review Date

To add a review date:

1. When adding a repeat medication, simply select **Item Review**.
2. **Item Review** automatically completes with your practice **Medication Review Date Offset** default, see [Setting up your Medication Review Offsets](#) on page 20, you can however update this as appropriate:

3. Complete the rest of the **Therapy - Add** screen in the usual way.
4. Select **OK** to save.

The **Item Review** date displays on the **Therapy** tab in the **Review** column. If an item **Medication Review** is due, the **Review** date displays in yellow, if an item **Medication Review** is overdue, the **Review** date displays in red:


| Last Issued | Drug | Iss | Max | Dosage | Q... | Preparation | Pro... | Authorised | Repeat Until | Prescriber | User | Print Script | Review | Pi |
|-------------|---|-----|-----|---|------|-------------|--------|------------|--------------|------------|------|--------------|------------|----|
| 04/04/2021 | Glutatin gluten free wheat free fibre mix (Dr Schar UK Ltd) | 1 | 6 | AS REQUIRED | 500 | gram | | 27/04/2020 | | BEAGL | SYS | Yes | 07/04/2021 | |
| 27/04/2021 | Ventolin 100micrograms/dose Evohaler (GlaxoSmithKline UK Ltd) | 6 | | 1 TO 2 PUFFS UP TO FOUR TIMES DAILY AS REQUIRED | 200 | dose | | 27/04/2021 | | BEAGL | SYS | Yes | 27/09/2021 | |
| 27/04/2021 | Diprbase ointment (Bayer Plc) | 1 | 3 | APPLY WHEN REQUIRED. | 500 | gram | | 01/04/2021 | | BEAGL | SYS | Yes | 27/04/2021 | |

Once you have reviewed the medication, either:

- **Reauthorise it** and select a new review date if appropriate, or
- **Inactive** the repeat.

Setting up your Medication Review Offsets

Your practice default **Medication Review** settings are set and maintained from **Control Panel**.

 **Note** - You must be a system administrator access **Control Panel**.

To set your practice **Medication Review** settings:

1. From the **Vision 3** front screen, select **Control Panel - File Maintenance - Settings - Therapy**.
2. The **Medication Review** settings display:

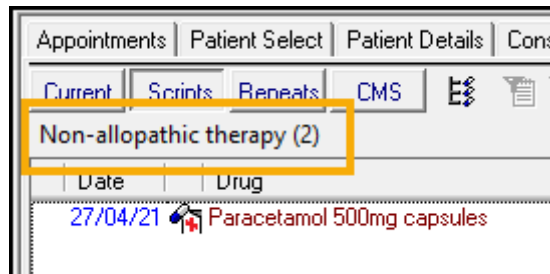


3. Complete as required:
 - **Date Offset** – Set the period in the future when you want to carry out the medication review. The default is six months, update if required.
 - **Overdue Offset** - Set the period after the review is due that you want it to display as overdue, red in the **Review** column. The default is zero, update if required.
 - **Due Offset** - Set the period before the review is due when you want to be reminded. The default is two weeks, yellow in the **Review** column. Update if required.
 - **Default Read Code** - The clinical term you want to use for medication reviews. Defaults to **8B3S.00 Medication review**, update if required.
 - **Date Offset Limit** - Defaults to the maximum time frame of 13 months, this is the offset date entered automatically when you select **Item Review** from any **Therapy - Add** screen.
4. Select **OK** to save.

Non-allopathic Medication

You can now record any non-allopathic medication your patient is taking, for example, homeopathic medication or Chinese medicine.

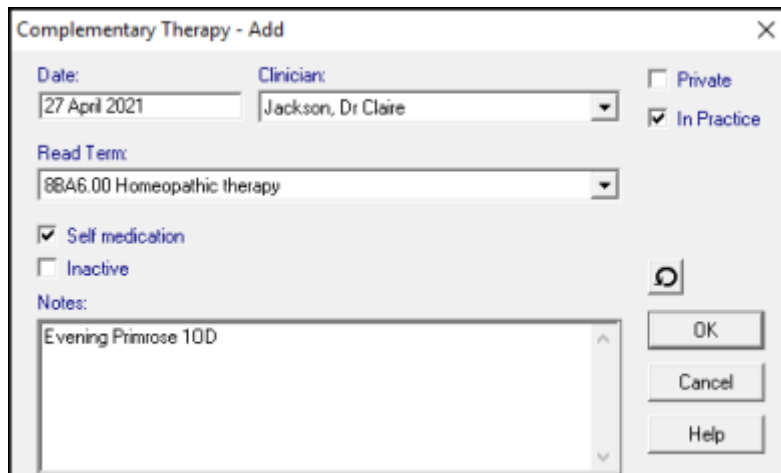
The **Therapy** tab has a new **Non-allopathic therapy** option with the number of active qualifying medications indicated in brackets:



Adding Non-allopathic Medication

To add a new non-allopathic medication:

1. From the **Vision 3** front screen, select **Consultation Manager** and find the patient.
2. Select the **Therapy** tab.
3. Select **Non-allopathic therapy**.
4. A list displays, select **Add Non-allopathic** which is always at the top of the list.
5. The **Complementary Therapy - Add** screen displays:



Complementary Therapy - Add

Date: 27 April 2021 Clinician: Jackson, Dr Claire Private
 In Practice

Read Term: 88A6.00 Homeopathic therapy

Self medication
 Inactive

Notes: Evening Primrose 10D

OK Cancel Help

6. Complete as appropriate:
 - **Date** - Defaults to today, update as appropriate.
 - **Clinician** - Defaults to the clinician logged on or the **Usual GP** if you are not a clinician.
 - **Read Term** - defaults to **8BF..00 Complementary therapy**, update from the available list as required.
 - **Self medication** - Tick if the patient has selected to take this medication themselves.

- **Inactive** - Tick if this medication is no longer being taken and you do not want the therapy to display on the **Non-allopathic therapy** count or list.
- **Notes** - Enter the details of the medication plus any other relevant information, for example, dosage.

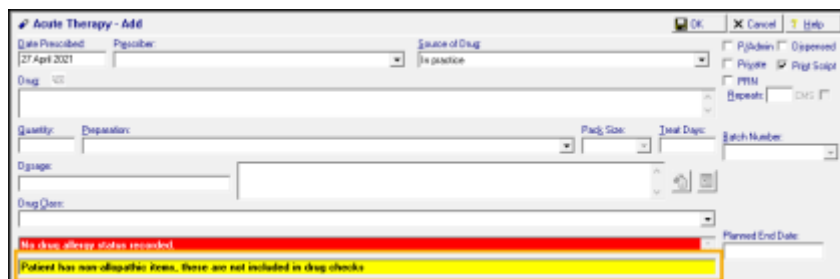
7. Select **OK** to save.

Viewing Non-allopathic Medication


To view recorded non-allopathic medication from the **Therapy** tab:

1. From the **Vision 3** front screen, select **Consultation Manager** and find the patient.
2. Select the **Therapy** tab.
3. Select **Non-allopathic therapy**.
4. A list displays, the top item is **Add Non-Allopathic**, beneath displays the first 30 characters of any active recorded non-allopathic medication. Select from the list to display the relevant **Over the Counter Drug Use - Update** screen.

If a patient has active non-allopathic therapy on their record, when you add an acute or repeat master the 'Patient has non-allopathic items, these are not included in drug checks' warning displays:



The screenshot shows the 'Acute Therapy - Add' form. At the bottom, there is a red warning bar that reads 'No drug allergy status recorded' and a yellow bar below it that reads 'Patient has non-allopathic items, these are not included in drug checks'. The form includes fields for 'Date Prescribed' (27 April 2021), 'Prescriber', 'Source of Drug' (In practice), 'Drug', 'Quantity', 'Preparation', 'Pack Size', 'Total Dose', 'Batch Number', 'Drug Class', and 'Planned End Date'. There are also checkboxes for 'P/Inclin', 'Dispensed', 'Psyche', 'Pkg Script', 'PRN', and 'Repeat'.

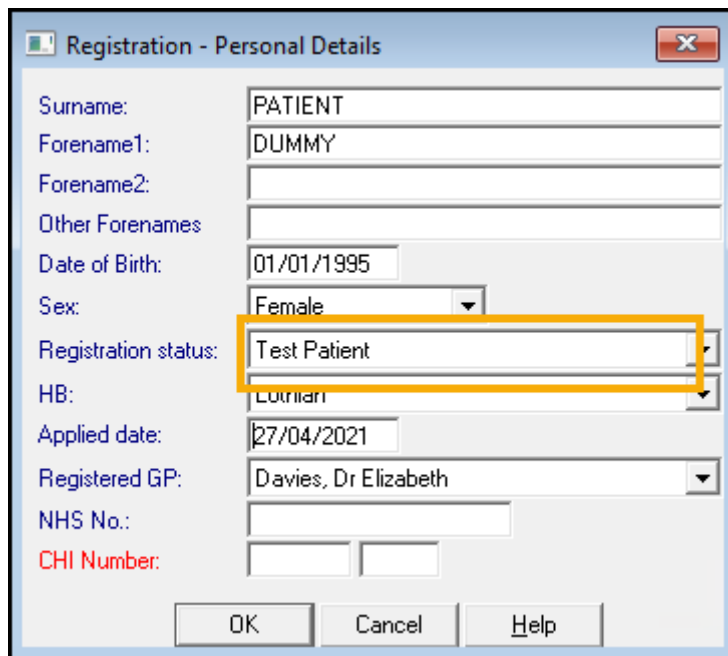
Away from the **Therapy** tab, Non-allopathic therapy displays on the patient record preceded by a **Cane** .

Creating and Using a Test Patient

Creating a **Test Patient** enables you to create a patient that is not included in any of your statistics or reports allowing you to use them for practice and testing purposes.

To add a test patient:

1. From the **Vision 3** front screen, select **Registration**.
2. Select **New Patient** .
3. The 'Add Member to an existing Family' message displays, select:
 - **Existing** - If the new patient is being added to an existing household, select any member of the household with the same address.
 - **Selected** - If a member of the family you are adding this patient to displays at the top of the screen. Most common when adding a family group or a new baby.
 - **New** - If the patient you are adding has no connection to anyone on your **Vision 3** system.
4. The **Registration - Personal Details** screen displays.
5. Complete as required, ensuring that in **Registration Status** you select **Test Patient**:



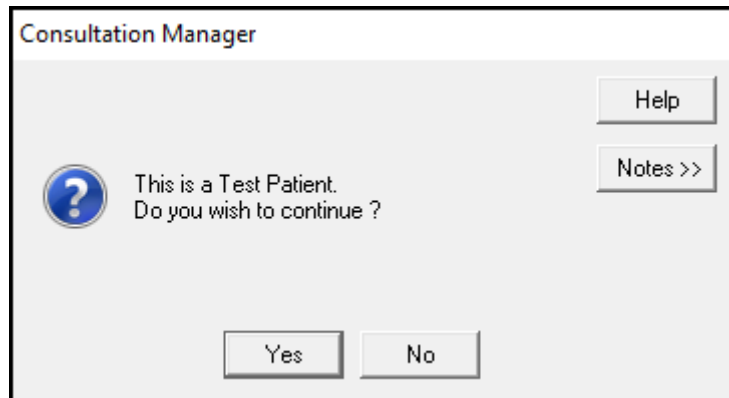
The screenshot shows a window titled "Registration - Personal Details" with the following fields and values:

- Surname: PATIENT
- Forename1: DUMMY
- Forename2: (empty)
- Other Forenames: (empty)
- Date of Birth: 01/01/1995
- Sex: Female
- Registration status: Test Patient (highlighted with a yellow box)
- HB: Lutonian
- Applied date: 27/04/2021
- Registered GP: Davies, Dr Elizabeth
- NHS No.: (empty)
- CHI Number: (empty)

Buttons at the bottom: OK, Cancel, Help.

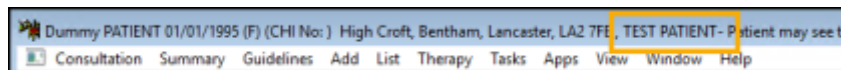
6. The **New Patient Registration** message displays, select **Yes** to continue.
7. The **Registration Details** screen displays, complete as required.

Every time you select a test patient anywhere in **Vision 3** the 'This is a Test Patient' warning displays:

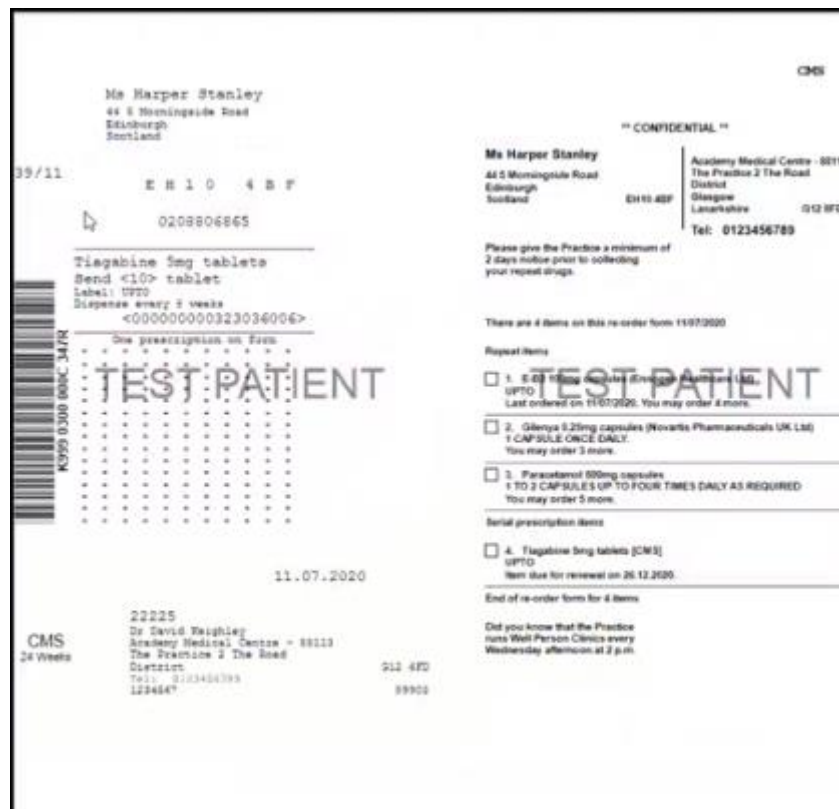


Consultation Manager

In **Consultation Manager**, if you select a test patient **TEST PATIENT** displays in the patient banner:



- **Therapy** - If you select to issue and print a prescription for a test patient, **TEST PATIENT** prints across the pages, for example:



- **Correspondence** - If you add a letter to a test patient using the **Vision 3** templates, '(Test Patient)' displays after the patient name, for example:

| | | |
|---------------|----------------|--------------------------------|
| | | Glasgow |
| | | G12 6FD |
| | | Business: 0123456789 |
| | | Date of printing: 11 July 2020 |
| Name | Harper Stanley | (Test Patient) |
| Date Of Birth | 02/00/1980 | |
| Address | 44 | 5 Morningside Road |

- **MED3 Doctor Statement** - If you create a MED3 for a test patient, a 'TEST PATIENT' watermark prints across the MED3 form.

Search and Reports

Within an **Ad-hoc** report, you can now select **Test Patient** from **Patient Details - Selections - Registration Status**.

If you choose to include test patients in your report, '*THIS REPORT CONTAINS TEST PATIENTS*' displays on the top of any printed report.

Search and Reports Reference Date

Search and Reports, now contains a **Reference Data** option. This enables you to set up a date range list outside of an individual search and then select from the available list when creating or updating a search.

This enables you to update the date range for a specific search or searches, without having to update the individual search(es).

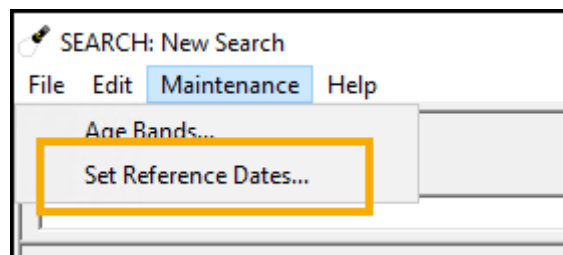


Note - The maximum number of date ranges is 100.

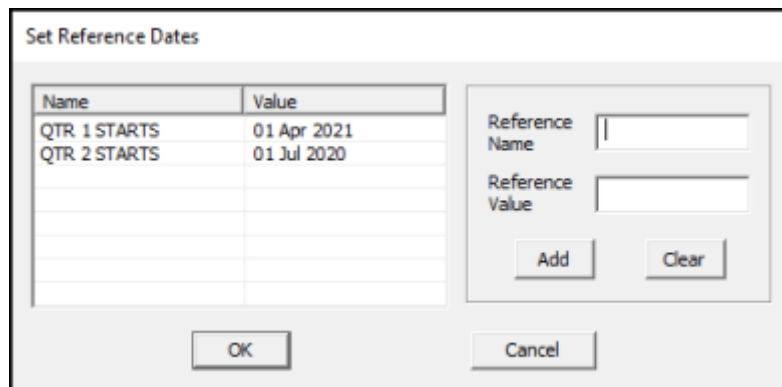
Setting Up Reference Dates

To set up your **Reference Date** list:

1. From the main **Search and Reports** screen or from within an ad-hoc search, select **Maintenance - Set Reference Dates**:



2. The **Set Reference Dates** screen displays, existing reference dates display in the list:



| Name | Value |
|--------------|-------------|
| QTR 1 STARTS | 01 Apr 2021 |
| QTR 2 STARTS | 01 Jul 2020 |
| | |
| | |
| | |

Reference Name:

Reference Value:

Add Clear

OK Cancel

3. Set up additional reference dates as required:




Note - Reference dates cannot be in the future.

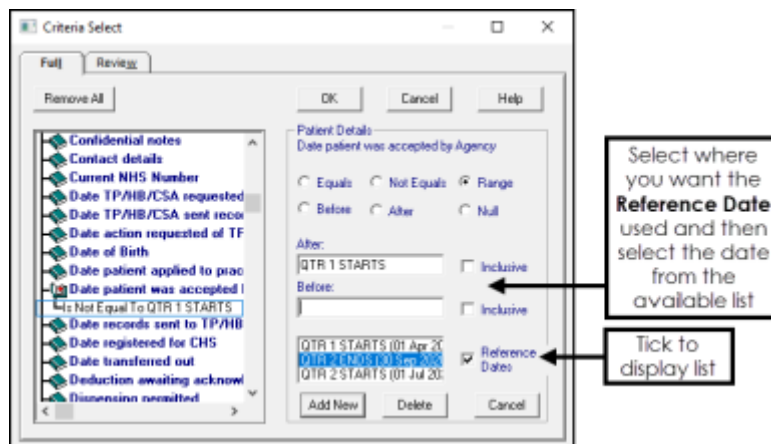
- **Reference Name** - Enter a name for your date.
 - **Reference Value** - Enter the date required.
4. Select **Add** to save the new reference date and add further dates.
 5. Select **OK** to save.

i Important - If you set up **Reference Dates** from within an ad-hoc search, you must close the search and then open it again in order to see your updated **Reference Dates** list.

Using Reference Dates

To use a **Reference Date** in a search:

1. From **Search and Reports**, for a new search select **New Ad-hoc Search**  or for an existing saved search, select the search from **Ad-hoc Search & Reporting** on the left hand side of your screen.
2. The **Search:New Search** screen displays.
3. Select or update the details in the usual way.
4. Anywhere you want to select a date/date range to search on, you have the option to select a predefined **Reference Date**. Tick **Reference Dates** to see the list available.
5. Select the criteria you want to set as a **Reference Date** and then select the **Reference Date** required:



6. Save and run the search in the usual way.

When the selected **Reference Dates** are updated, the new dates are used the next time this search is run.