Vision 3 Release Guide DLM 830

Version 2.3

1st June 2023

Contents

Vision Release DLM 830

Summary of Changes

September 2022

All Countries

Enhanced Security

Vision 3 release **DLM 830** introduces enhanced security to all **Cegedim Healthcare Solutions Primary Care** products. This is being introduced to improve the security of your system and safe guard your patient data in line with the requirements laid out by the national bodies across all four nations.

> **Note -** Although Enhanced Security is being released as part of **Vision Release DLM 830**, it is disabled pending instruction from your national body. When instructed we will notify you and then switch on the functionality.

> See **Enhanced Security** on page **15** for details.

Consultation Manager

Vision 3 release **DLM 830** contains the following new features and improvements for **Consultation Manager**:

General

- **Spell Checker** (Available for Hosted practices with Windows 10 and Windows Server 2012 or later only) - A spell checker has been added to all data entry forms within **Consultation Manager**, it uses the standard Windows dictionary combined with a medical lexicon based on SNOMED CT terms. Words that are not recognised are underlined with a red wavy line. To see suggestions for the word you have entered, right click on the incorrect word and a list of alternatives displays, select as required, or you can simply manually correct the word.

> **Note** - An unrecognised spelling does not prevent you from saving an entry.

- **Lock/Unlock Patient** - When you attempt to open a consultation for patient that is already in use by another member of staff, the **Display Only** message now contains details of the member of staff with the patient record open. Select **OK** to dismiss the message open the patient in **Display Mode**:
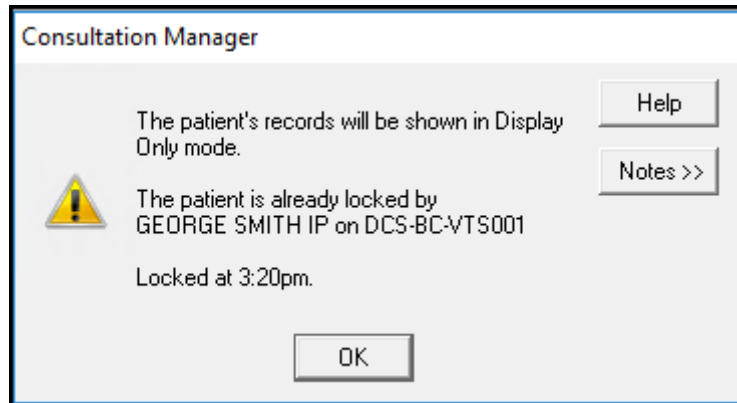
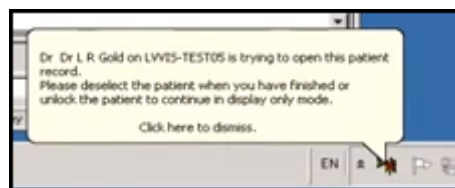The member of staff with the record open, receives a notification that you are trying to open the record to prompt them to release the patient record as soon as they are able:

To unlock the patient you can, select **Consultation - Unlock the Patient**. This closes any consultation you have open leaving the record on your screen in **Display Only** mode.

If you have a patient displaying on your screen in **Display Mode**, and no-one else has locked the patient, you can select **Consultation - Lock the patient** to open a consultation.

- **Alerts** - If a patient has unverified contact details, a new **Contact Verification Required** alert displays:

To mark a contact type as verified, simply double click the alert to display the **Patient Details** screen, highlight the contact information that is not verified, select **Edit**, tick **Verified** and select **OK**.

Prescribing

- **Drug Warnings** - To comply with best practice, the warning message that displays when prescribing medication that contains **Valproate** to female patients has been extended to include all females in the 12 - 55 years age bracket.

- **Treatment Days** - The values entered in both **Quantity** and **Dosage** are now used to calculate the number of treatment days. For Controlled Drugs, when you select **OK**, if the number of days exceeds 30, a warning displays. Select **OK** to continue.

- **Private Prescriptions** - When you add a therapy item as **Private**, **[PRIVATE PRESCRIPTION]** now prints after the medication details on the right hand side and private items print on a separate script.

Control Panel

Vision 3 release **DLM 830** contains the following new features and improvements for **Control Panel**:

- **Settings** - You now have the option to restrict all **Non-Medical Prescribers**, for example, Nurses and Paramedics to the **National Drug Select Rule**:

  In **England**, **Wales** and **Northern Ireland**, the default is unrestricted, to update the setting:

  1. From the **Vision 3 Front Screen**, select **Management Tools - Control Panel - File Maintenance**.

  2. Select **Settings** and then the **Therapy** tab.

  3. From **Non Medical Prescribing**, tick **Restricts prescriber choices** to restrict all your **Non-Medical Prescribers** to the **National Drug Select Rule**.

  4. Select **OK** to save.

    Note - This is a practice wide setting and cannot be updated for individual **Non-Medical Prescribers**.

  In **Scotland** the **National Drug Select Rule** is expected to be mandatory, but is currently disabled pending a decision from the Scottish Government.

Search and Reports

Vision 3 release **DLM 830** contains the following new features and improvements for **Search and Reports**:

- **Scheduling a Batch of Reports** - The way you schedule batches of reports has been updated to allow you to schedule batches at any time in the future.

  The following changes have also been made to facilitate the scheduling process and make the management of your batch reporting simpler:

  - All existing batches and any new ones you create, now have the number of searches included in it in brackets alongside the **Batch** name.

  - You can no longer drag and drop a search directly to the schedule, a batch must be created in order to schedule a search. Simply drag the search to the **Batch** pane and allocate a name to the batch, a batch can contain just one search if appropriate.

- **Standard and Detailed Reports** - Patient details are now underlined to help them stand out on a report and entities searched on display in alphabetical order.

- **Interrogating Search Results** - If your **Report Output** is set to **View**, once your search is run, from **View of Patient Details** screen, you can now:

  - **Open the record of a returned patient** - Right click on any patient on the list and select **Open ConMgr** to open their record in **Consultation Manager**.

  - **Filter on any data returned by a search** - Filter the returned results, right click on a column header to enter free text or a specific result to have the filter populated with the returned text, and select **Filter**. The **Filter** screen displays, enter the text you want to filter on or update the auto-populated text and select **OK**. Only the results that match your filter display.

    > **Training Tip** - If you select to add a free text **Date of Birth** it must be in the following format, yyyymmdd, for example 20200816 for the 16th August 2020.

    To clear the filter, right click on the header again and select **Clear Filter**.

    > **Important** - As the filter works on free text and 'female' contains the word 'male' it cannot be used to filter patients by **Sex**.

  - **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.

   > **Note** - Percentages only display if you have selected a patient group to perform this search on.

England Only

Vision 3 release **DLM 830** contains the following new features and improvements for England only:

Consultation Manager

- **Free Supply Endorsement** - To indicate an item is being prescribed as a sexual health treatment of a Sexually Transmitted Infection (STI) and should therefore be issued free of charge, there is a new **FS** option.

    To mark an item as **Free of charge STI treatment**, tick **FS**. A reminder re the use of the **Free Supply Endorsement** displays. Select **OK** to close the reminder and continue if appropriate:
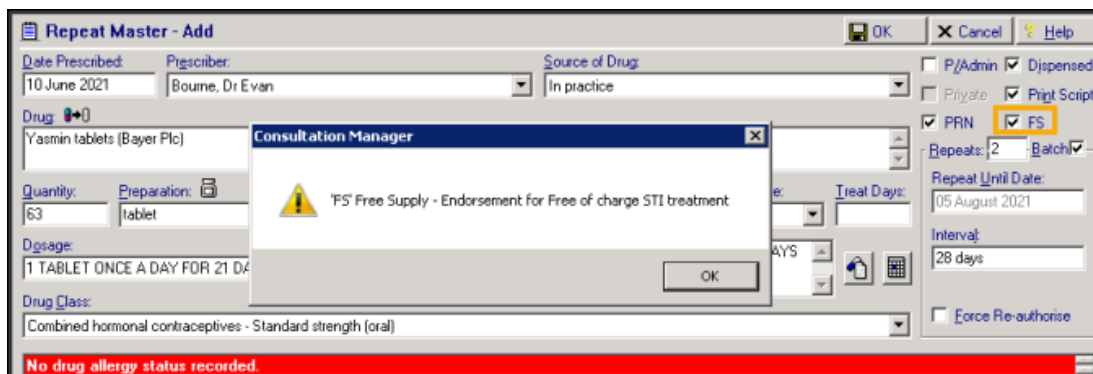
    On a paper prescription, **FS** prints after the item name.

    On an electronic prescription, **FS** displays in the endorsement column.

> **Remember** – Remove an FS endorsement when you reissue or reauthorise an item if it is no longer relevant.

Scotland Only

Vision 3 release **DLM 830** contains the following new features and improvements for Scotland only:

Consultation Manager

- **Formulary Management Tool (FMT)** - The **Cegedim Healthcare Solutions Formulary Management Tool (FMT)** is now fully integrated with **Vision 3** allowing you to utilise multiple formularies, including those issued and maintained by your Health Board, across your practice.

  Note – This functionality is currently disabled pending NSS notification.

  See **Cegedim Healthcare Solutions Formulary Management Tool** on page **20** for details.

- **Instalment Dispensing** - A new **Therapy Plan** screen is available when you select **Instalment dispensing** from **Acute Therapy - Add**. From **Therapy Plan**, you can define dosage regimes for the selected item.

  Note - **Vision 3** release **DLM 830** does not affect existing instalment instructions, these can however be updated when you reauthorise next.

  See **Instalment Dispensing** on page **36** for details.

- **Non-Medical Prescribers**:
  - The following details now display on any prescription authorised by a member of staff classified as a Non-Medical Prescriber:
    - **Prescriber Number**
    - **Staff Role**
    - **Authorisers Name**
    - **Practice Details**
    - **Professional Registration Number**

These are all set up in **Management Tools - Control Panel - Staff**, see Adding Staff in the **Management Tools Help Centre** for details.

- **Prescriber Capacity/Capacity** - This option displays, on both the therapy **- Add** and the **Prescription Manager** screens, if you are a non-medical prescriber with both **Independent** and **Supplementary** prescriber settings, select under which prescriber capacity you are prescribing.

- **Drug Check** - For prescribing safety, you can no longer suppress the drug-condition contraindication or any precautions. If you have selected **Never** in your settings, this is updated to **Patient Specific** as part of the **DLM 830** update

- **SCI Gateway** - The following updates are included this release:

  - Two new types of **New Message** are available from **SCI Gateway**, both of which write back to the patient's record, with all the associated information in **Consultation Manager** when saved:

    - **Advice Dialog**

    - **Emergency Dialogue**

      🖊 **Note** – The new message types are not available until they are switched on by your SCI Gateway team.

  - When you open **SCI Gateway** and check incoming messages, if a response to a message you have sent is received, when you select **Save to File**, the message is now added to the original message in **Consultation Manager** creating an easy to follow message trail:

Appointments	Patient Select	Patient Details	Consultations	▸ Journal	Filtered List	Summary/C

Date	Description
06/04/21	📎 Emergency Dialogue From: Dr. Elizabeth Day Drs Day & Raja (46381) Sent: 2021-04-06 06:07:24 To: General Medicine Subject: Post operative complication
	📎 Clinical Letter From: Dr David Keighley Academy Medical Centre - 88113 Sent: 2021-04-06 06:04:45 To: Glasgow Royal Infirmary General Medicine Subject: Clinical Dialogue to hospital
	📎 Advice Dialogue From: Dr David Keighley Academy Medical Centre - 88113 Sent: 2021-04-06 06:03:21 To: Glasgow Royal Infirmary General Medicine Subject: Advice Dialogue from GP to Hospital
12/03/01	H. Medication requested

    If a message fails to write back to the patient record, a warning displays and the message can be manually attached through Docman.

    ℹ **Important** - **SCI Gateway** does not prompt you if you are not responding to the latest message in a trail, so ensure you check there are not later messages.

> 💡 **Remember** - For help with using **SCI Gateway**, you can select **Help** from the bottom left corner of the **SCI Gateway** screen.

- **Key Information Summary (KIS) Special Note** - Clinical term **9bK5.00 Special patient note**, is now updated to include the entry with the latest **Event Date** in the ECS/KIS extract.

- **Alerts** - You are no longer warned if a patient does not have a valid NHS Number.

Control Panel

- **Staff Groups** - The installation of **DLM 830** automatically creates a **$TasksSystem** group to support the new **Cegedim Healthcare Solutions Formulary Management Tool (FMT)**. Staff members with the following **Roles** are automatically added to the group:

    - Senior Partner
    - Pharmacist
    - Practice Manager
    - Computer Manager

    You should review and update the members of this group as per your practice requirements. This group receives notifications when your practice subscribes to a formulary or a formulary is updated, either automatically or manually. In the unlikely event of there being no members of staff with the above **Roles**, the **$TasksSystem** group remains empty until manually updated. In this scenario, nobody would be notified of formulary changes.

- **Staff Roles** - To support new **Non-Medical Prescribers** functionality the following staff roles have been added:

    - **Nurse Practitioner** - Professional Registration Number type is **NMC PIN**
    - **Nurse Practitioner Advanced**-Professional Registration Number type is **NMC PIN**
    - **Nurse Prescriber** - Professional Registration Number type is **NMC PIN**
    - **Health Care Assistant** - Professional Registration Number type is **NMC PIN**

    When adding any of the above staff and those listed below, you are prompted to add a **Professional Registration Number** and a valid **Prescriber Number**:

    - **Chiropodist** - Professional Registration Number type is **HCPC Number.**

- **Dietician** - Professional Registration Number type is **HCPC Number**.

- **Optometrist** - Professional Registration Number type is **GOC Number**.

- **Paramedic** - Professional Registration Number type is **HCPC Number**.

- **Pharmacist** - Professional Registration Number type is **GPhC Number**.

- **Physiotherapist** - Professional Registration Number type is **HCPC Number**.

- **Radiographer** - Professional Registration Number type is **HCPC Number.**

Note - For all **Non-Medical Prescribers**, except **Nurses** and **Pharmacists** the Prescribing Number is a seven digit number. All nurses have a five digit Prescribing Number.

Mail Manager

- **Test Patient** - Acute Medication Services (AMS) and Chronic Medication Services (CMS) messages are no longer sent for the a patient registered as a Test Patient.

Search and Reports

- **Patient Data Anonymisation** - If you are creating an ad-hoc search for a third party, you can now select to anonymise the data. From the **Search:New Search** screen, select **Report Output - Standard Anonymised**:
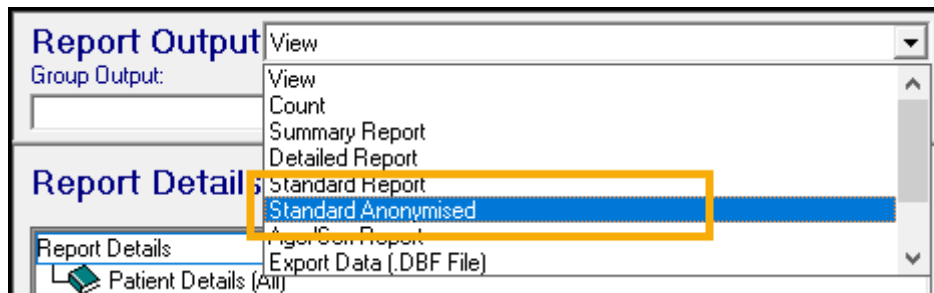
All patient details are replaced by the **Patient Id** number:

> *i* **Important** - The **Standard Anonymised** report contains any free text comments attached to an entry, this can include patient identifying information.

> *💡* **Training Tip** - You can identify a patient by using **Select a Patient** 🚹 and searching by **Vision Identifier**.

Enhanced Security

Vision 3 release **DLM 830** introduces enhanced security to all **Cegedim Healthcare Solutions Primary Care** products. This is being introduced to improve the security of your system and safe guard your patient data in line with the requirements laid out by the national bodies across all four nations.

In order to be ready for enhanced security, all **Vision 3** users, including those that are set up in **Vision 3** to use **Vision Anywhere**, **Appointments**, **Tasks** and **Community** in a mobile or stand alone setting, must have a valid NHS email address recorded.

> **Note** - Enhanced Security does not work with shared email addresses, each staff member must have their own unique email address.

A valid NHS email is one that ends:

- @nhs.net
- @nhs.scot
- @nhslothian.scot.nhs.uk
- @lanarkshire.scot.nhs.uk
- @ggc.scot.nhs.uk
- @aapct.scot.nhs.uk
- @borders.scot.nhs.uk
- @wales.nhs.uk
- @hscni.net

> **Important** - Once updated to **Enhanced Security**, your email address cannot be edited or deleted as this prevents you from accessing **Vision 3** or **Vision Anywhere**.

Updating to Enhanced Security

The first ever time you log into **Vision 3** or the first time after **Enhanced Security** is switched on at your practice, you are prompted to update to **Enhanced Security.**

1. From your **Vision 3** log in screen, select your user name and enter your usual password.

2. The **Enhanced Security Migration Opt Out** screen displays, detailing the email address that is set up against your account:

3. Check the email address referenced is correct, if:

   - The email address is correct, select Yes to continue the move to enhanced security.

   - The email address is wrong, select No and you are logged in with your local credentials.

   > **Training Tip** - Contact your systems administrator to update the email on your record, see Editing a Staff Member's Details in the Management Tools Help Centre for details.

4. A **Vision Login** screen displays advising you must confirm your email address, select **OK**.

5. If you have not already logged into your email system, log in and then check your emails for the confirmation email message. Copy the confirmation code from the confirmation email.

6. Return to the **Vision 3** screen and the **Please confirm your email address screen** displays, paste the code you have copied into this screen and select **OK**.

> 💡 **Training Tip** - You can used the **<Ctrl> C** keys at the same time to copy and the **<Ctrl> V** keys at the same time to paste.

7. A **Vision Login** screen displays advising your email address is confirmed, select **OK**.

Your update to **Enhanced Security** is complete, simply enter your password in the usual way to finish logging in to **Vision 3**.

> ℹ️ **Important** - If you work across more than one practice or service using **Cegedim Healthcare Solutions** products, as each practice or service updates to Enhanced Security, your email address is recognised and you must use the password you used the first time you updated to Enhanced Security.

Setting up New Users

Once Enhanced Security is enabled, you are prompted when setting up a new staff member in **Management Tools - Control Panel - Security** if the staff member does not have a valid email address set up in **File Maintenance:**
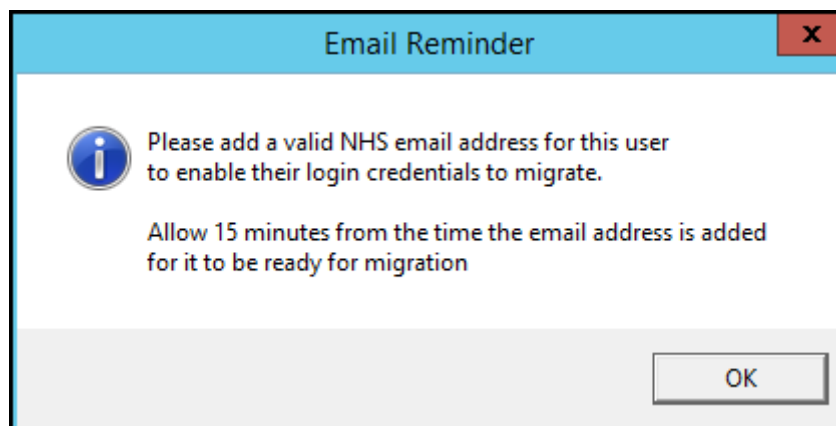
> ✏️ **Note** - Once the email address is added, the log in is not available for approximately 15 minutes.

> ➡️ See Adding Staff in the **Management Tools Help Centre** for details.
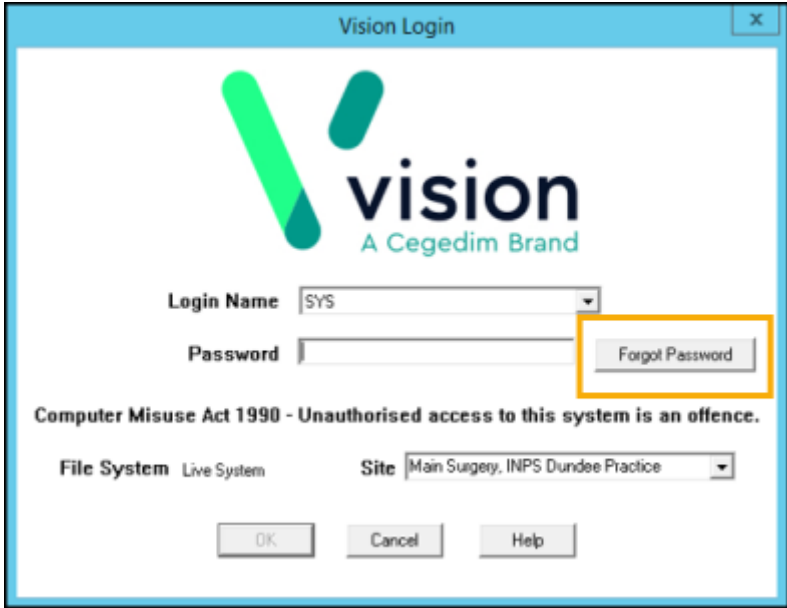
Resetting your Password

Once you have updated to Enhanced Security, if you forget your password, you can now reset it yourself.

To reset your password:

1. From the **Vision 3** log in screen, select your user name in the usual way and then select **Forgot Password**:

2. The **Reset Password** screen displays:

3. Complete as follows:

- **Confirmation code** - **Vision 3** send your registered email address an email containing a confirmation code, copy and paste or simply enter the code here.

  > **Training Tip** - You can use the **Ctrl + C** keys at the same time to copy and the **Ctrl + V** keys at the same time to paste.

- **New password** - Enter the password you want to use.

- **Verify password** - Confirm the password entered above.

4. Select **OK** to save.

5. A **Vision Login** screen displays, advising your password reset is successful, select **OK**.

You can now log in with your new password.

> 💡 **Training Tip** - Updating your password from within **Vision 3** has not changed, from the **Vision 3** front screen, select **Login** - **Change Password**, see Changing Your Password in the Front Screen Help Centre for details.

Scheduling a Batch of Reports

The way you schedule a batch of reports has been updated to enable you to set the reports to run at any time or date in the future.

To set a schedule:

1. From the **Search and Reports** screen, drag and drop a batch on to the **Schedule Name** pane.

2. The **Add Schedule** screen displays, enter a name and select **OK**.

    > **Note** - Spaces are not permitted in a **Schedule** name, an error message displays if you enter a space.

3. The **Add New Schedule** - **Perform this schedule** screen displays, select how often you want to run this batch and select **Next**:
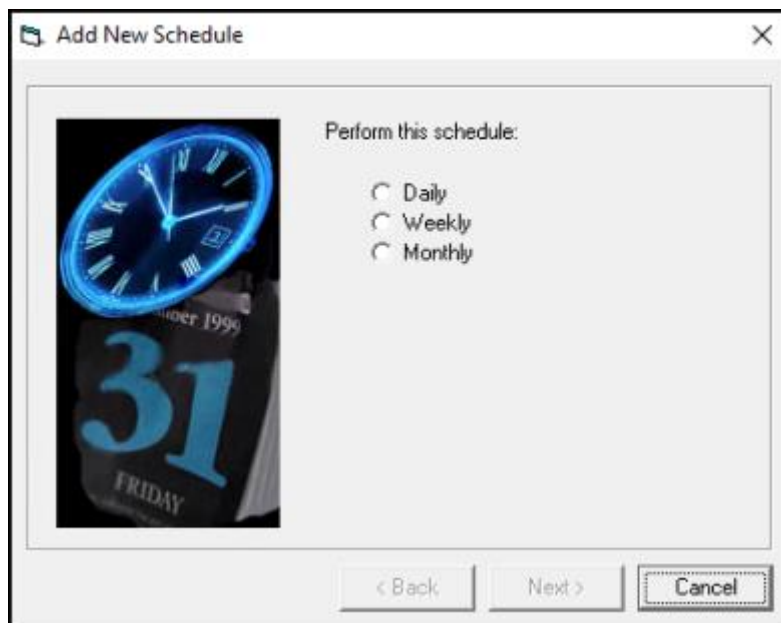
4. The **Add New Schedule** - **Daily/Weekly/Monthly** screen displays, select when you want to run this batch and select **Next.**

5. The **Add New Schedule** - **Select Start and Stop Date(s)** screen displays, enter a **Start Date** and an optional **End Date** for this schedule and select **Next.**

6. The **Add New Schedule - Select Start Time(s)** screen displays, select **Add,** enter a **Start Time**, select **Accept** and select **Next.**

    > **Note** - The time selected must be between 9am and 6pm.

7. The **Add New Schedule** - **Summary** screen displays, check the details and tick **Enable Schedule** to confirm.

8. Finally, select **Finish.**

9. The scheduled batch displays in the **Schedule** pane with the schedule details and its current **Active/Inactive** status.

10. If required, you can drag and drop additional batches of reports to add them to the schedule.

> **Training Tip** - You can select a schedule to see what batches are included in it.

Hosted Servers

If you are a hosted site, this process creates PDF documents which you can

access from P:\Wordproc\Scheduled_searches using **File Explorer** .

Local Area Networks (LAN)

If you have your own server:

- If you have a PDF Printer configured, this process creates PDF documents which you can access from

  P:\Wordproc\Scheduled_searches using **File Explorer** .

- If you do not have a PDF Printer configured, this process creates CSV files which you can access from P:\Wordproc\Scheduled_searches

  using **File Explorer** .

> **Note** – If no PDF printer is configured a warning message displays.

Changing a Scheduled Batch

To change a schedule:

1. From the **Search and Reports** screen, find the schedule you want to update.
2. Right click on it and select **Update**.
3. The **Edit Schedule** screens display, change any details as required, selecting **Next** to move to the next screen.
4. Finally, select **Finish.**

Cegedim Healthcare Solutions Formulary Management Tool

A drugs formulary is a curated list of items that help to direct prescribers towards the most appropriate, evidence based and cost effective items from the **Dictionary of Medicines and Devices (DM+D)**.

> **Important** - Even with a formulary switched on, you still have the clinical freedom to select items from outside the formulary if required.

The **Cegedim Healthcare Solutions Formulary Management Tool (FMT)** is now fully integrated with **Vision 3**, allowing you to utilise multiple formularies, including those issued and maintained by your Health Board, across your practice.

The **Cegedim Healthcare Solutions FMT**:

- Is stored in a central database rather than locally.

- Is version controlled and published for use at your discretion.

> **Note** - If you select to activate Cegedim Healthcare Solutions FMT, it supersedes the **Drug Dictionary Utilities** module accessed from the Vision 3 Front Screen **- Utilities - Drug Dictionary**.

If you opt to use the **Cegedim Healthcare Solutions FMT**, you can:

- Simply utilise the formularies created and maintained by your Health Board, or

- Utilise formularies created and maintained by your Health Board and create and control your own practice formulary.

For either option you need to install and have access to the **Cegedim Healthcare Solutions FMT**.

> See the Cegedim Healthcare Solutions FMT Help Centre for details of creating and maintaining your own formularies. Contact your Account Manager to arrange installation.

Subscribing to a Formulary

In order to utilise a **Cegedim Healthcare Solutions FMT** formulary when prescribing medication, you must subscribe to it.

> ✏️ **Note** - You cannot edit formularies created by third parties, for example, a formulary created and maintained by a Health Board.
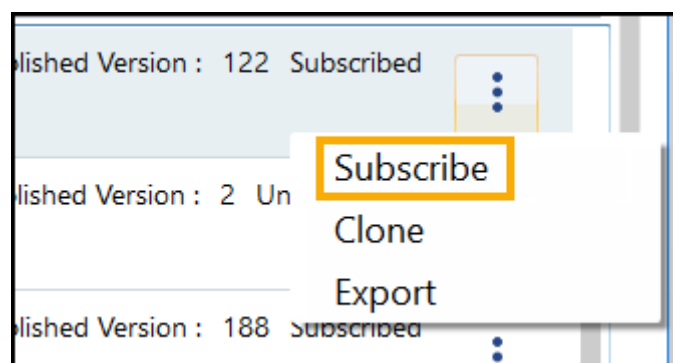
To subscribe to a formulary:

1. From **Cegedim Healthcare Solutions FMT**, find the formulary you want to subscribe to.

> ✏️ **Note** - Formularies you have not yet subscribed to, display as **Unsubscribed**.

2. Select **Options** ⋮.
3. Select **Subscribe**:

4. Close **Cegedim Healthcare Solutions FMT**.

Must now allocate access rights to members of staff, see **Managing FMT Access** on page **29** for details.

> ➡️ See the Cegedim Healthcare Solutions FMT Help Centre for details of creating and maintaining your own formularies.

Activating Cegedim Healthcare Solutions FMT

Once you have subscribed to the formularies required within **Cegedim Healthcare Solutions FMT**, see **Subscribing to a Formulary** on page **23** for details, you must first set up and then activate **Cegedim Healthcare Solutions FMT** in **Vision 3**.

> ✏ **Note** - You must have an internet connection to activate **Cegedim Healthcare Solutions FMT**.

To set up and activate the **Cegedim Healthcare Solutions FMT**:

1. From the **Vision 3 Front Screen**, select **Control Panel - File Maintenance - Settings - Formulary**:
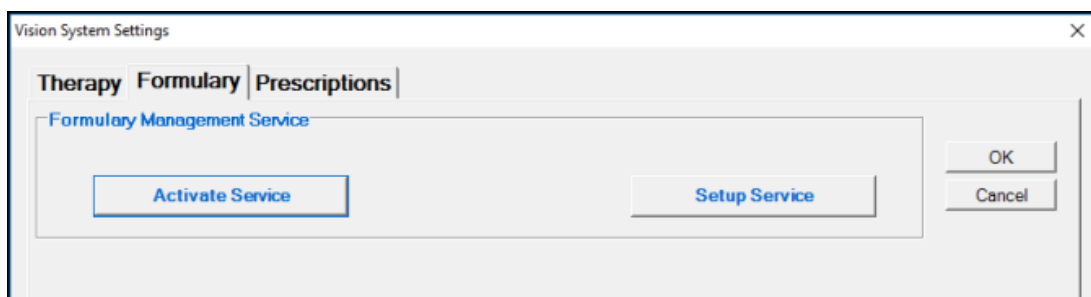
> ✏ **Note** - You should set up your **FMT** options before selecting **Activate**.

2. Select **Setup Service** and **Setup Step 1 of 2** displays:
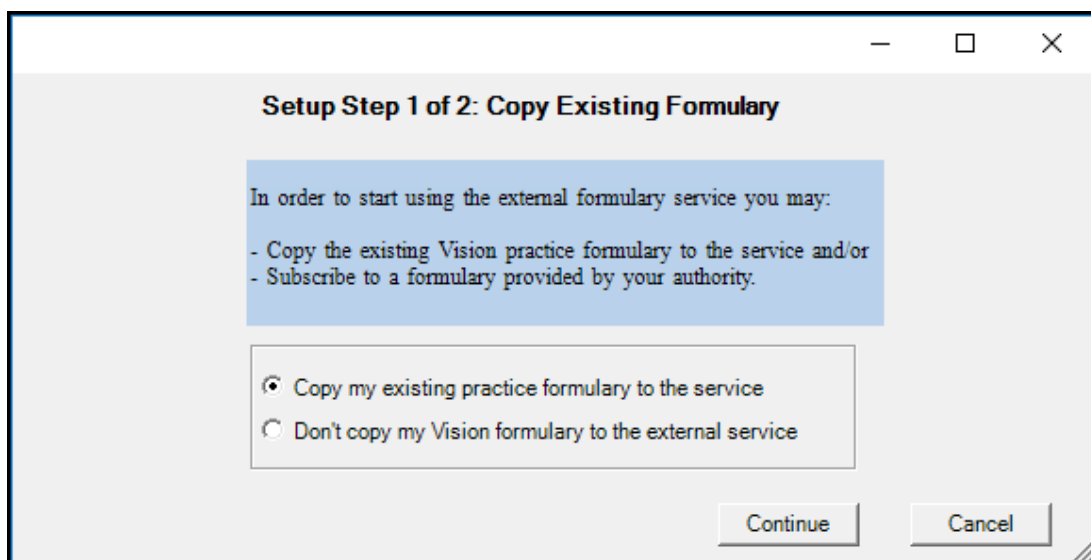
3. Select either:

- **Copy my existing practice formulary to the service** - Select to use your existing formulary from **Cegedim Healthcare Solutions FMT**, or

- **Don't copy my Vision formulary to the external service** - Select to use centrally available formularies if you do not have, or have but do not maintain, your own formulary.

4. Select **Continue**.

5. If you select **Copy my existing practice formulary to the service**, a **Security Warning** may display, select **Run** and the **Exporting Formulary** screen displays with a progress bar. Once it is complete, select **Close:**
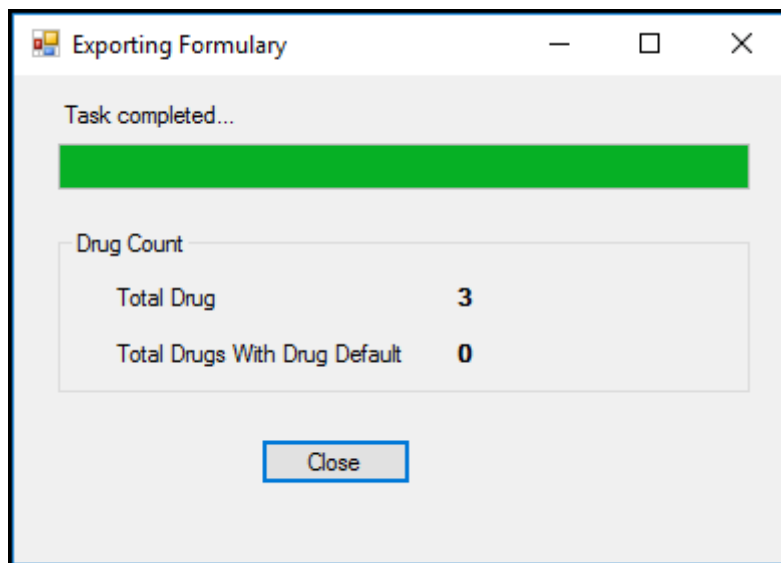
6. Select **Setup Service** and **Setup Step 2 of 2** displays:
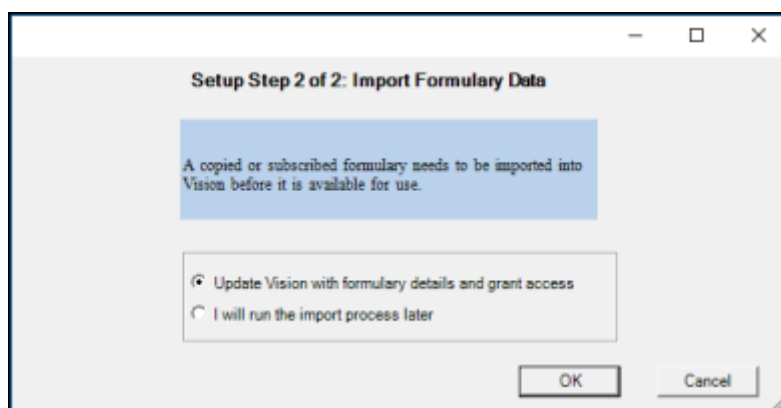
7. Select either:

- **Update Vision with formulary details and grant access** - Select to import available formularies to your **Vision 3** system for use, or

- **I will run the import process later** - Select to defer the import.

> ✎ **Note** - When you return to import the formularies, you must work your way through the options again and select **Setup - Service - Don't copy my Vision formulary to the external service** and then **Update Vision with formulary details and grant access**.

8. Select **OK** and if you have selected to continue, the **Manage Formulary Updates** screen displays.

9. The **Manage Formulary** screen displays all the formularies available to you, including your practice formulary if you selected **Copy my existing practice formulary to the service** in step one of the set up:
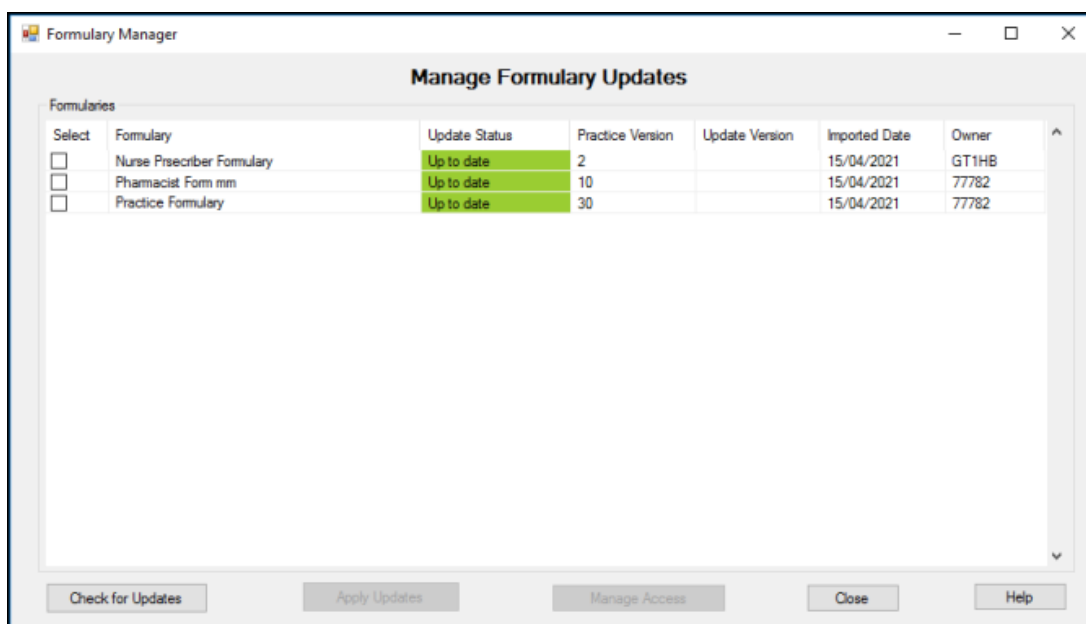
The following options are available:

- **Check for updates** - Select to check for any updates. If there are any updates, the **Update Status** displays **Update available** in yellow.

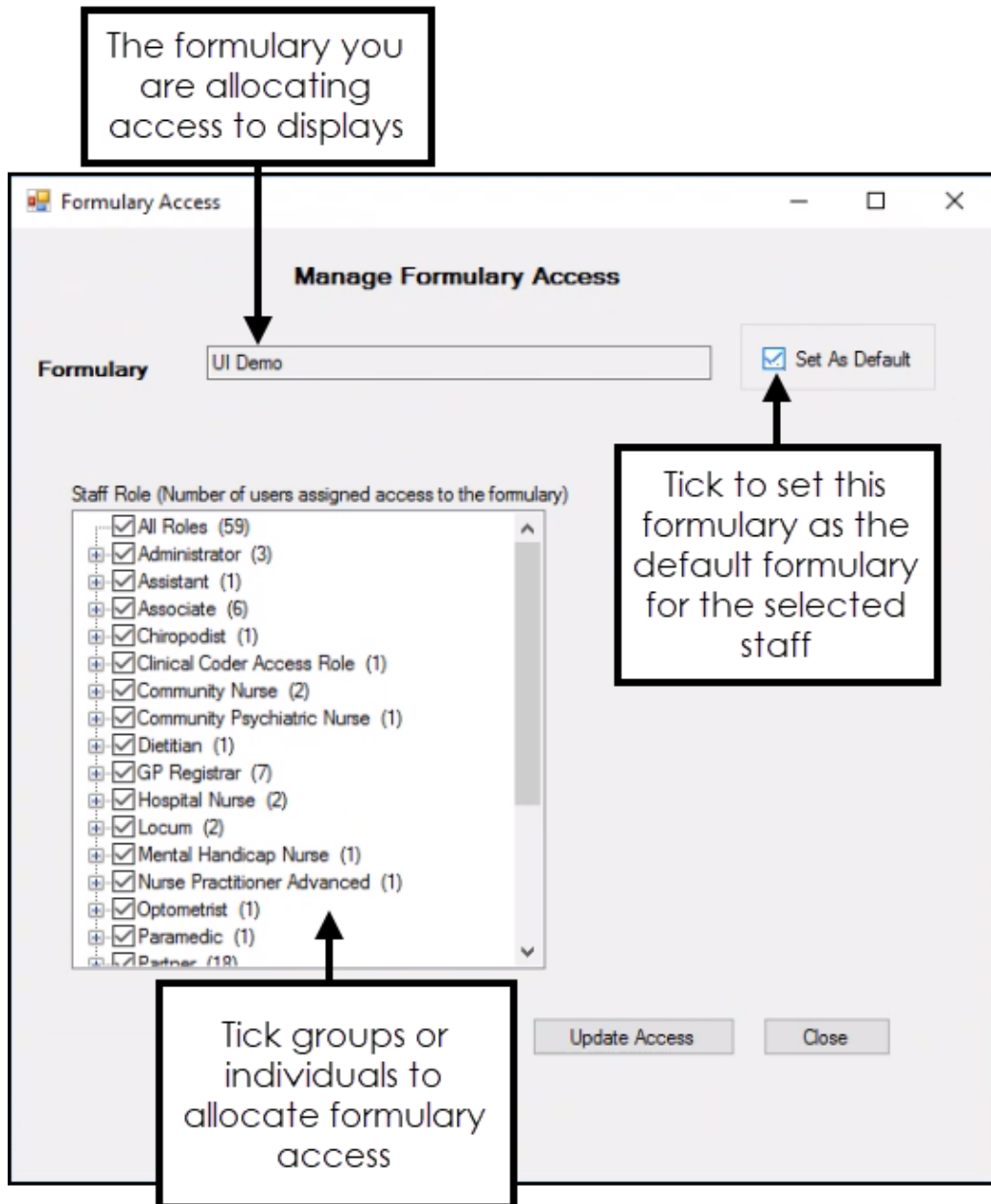> ✎ **Note** - Formularies you subscribe to automatically synchronise overnight.

- **Apply Updates** - If there are any updates, the **Update Status** displays **Update available** in yellow. You can select to **Apply Updates** if you need it urgently, see **Running a Manual FMT Update** on page **31** for details.

- **Manage Access** - To define which staff member can access which formulary and set their default formulary, tick the formulary required and select **Manage Access**. The **Manage Formulary Access** screen displays:

The formulary you are allocating access to displays

Manage Formulary Access

Formulary | UI Demo | ☑ Set As Default

Tick to set this formulary as the default formulary for the selected staff

Staff Role (Number of users assigned access to the formulary)
- ☑ All Roles (59)
- ☑ Administrator (3)
- ☑ Assistant (1)
- ☑ Associate (6)
- ☑ Chiropodist (1)
- ☑ Clinical Coder Access Role (1)
- ☑ Community Nurse (2)
- ☑ Community Psychiatric Nurse (1)
- ☑ Dietitian (1)
- ☑ GP Registrar (7)
- ☑ Hospital Nurse (2)
- ☑ Locum (2)
- ☑ Mental Handicap Nurse (1)
- ☑ Nurse Practitioner Advanced (1)
- ☑ Optometrist (1)
- ☑ Paramedic (1)
- ☑ Partner (19)

Tick groups or individuals to allocate formulary access

Update Access   Close

> ✎ **Note** - **Manage Access** is inactivated if you select more than one formulary.

Tick the role based group to permit the whole group access to the formulary, or using **Expand** ⊞, locate the individual staff members required and tick as appropriate.

If this formulary should be their default, tick **Set As Default.**

- **Help** - Opens the relevant help topic in the Managing FMT Updates in the **Management Tools Help Centre**.

10. Select **Close** to return to the **Formulary** screen.

11. Now, select **Activate Service**.

12. The **Activate** screen displays, select from:

- **Switch over to external formulary service** - To switch your practice to using the **Cegedim Healthcare Solutions FMT** service, or

- **Continue using existing Vision practice formulary** - To remain with your original **Vision 3** formulary:
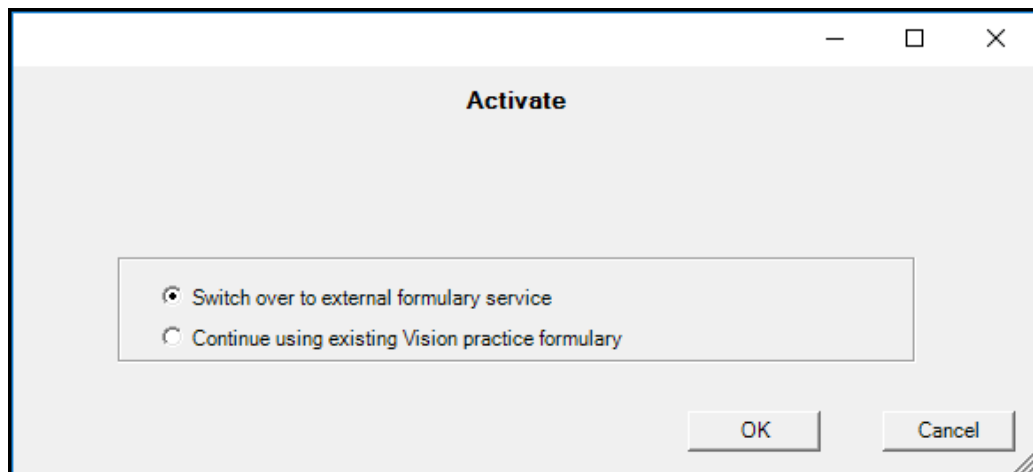
13. Select **OK** to save.

14. Select **OK** to save all settings.

See the Cegedim Healthcare Solutions FMT Help Centre for details of creating and maintaining your own formularies.
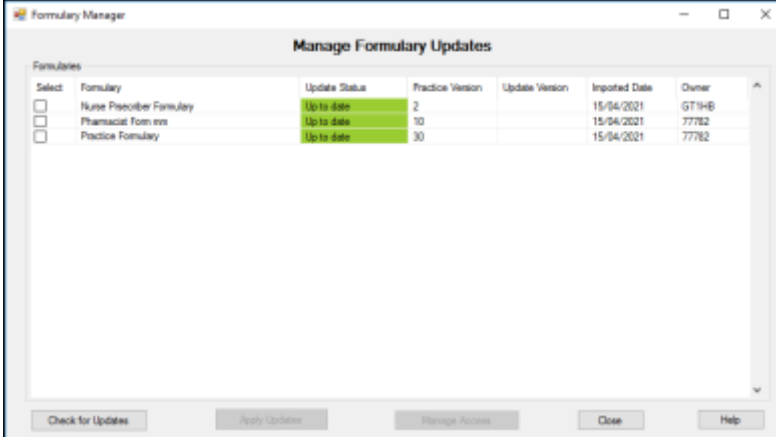
Managing FMT Access

If you are using centrally distributed formularies, to set and maintain formulary rights for your staff:

1. From the **Vision 3 Front Screen**, select **Control Panel - File Maintenance - Formulary** .

2. The **Manage Formulary Updates** screen displays:

3. Tick the formulary you want to set access for and select **Manage Access**.

> ✎ **Note** - **Manage Access** is inactivate if you select more than one formulary.

4. The **Manage Formulary Access** screen displays:

The formulary you are allocating access to displays

Tick to set this formulary as the default formulary for the selected staff

Tick groups or individuals to allocate formulary access
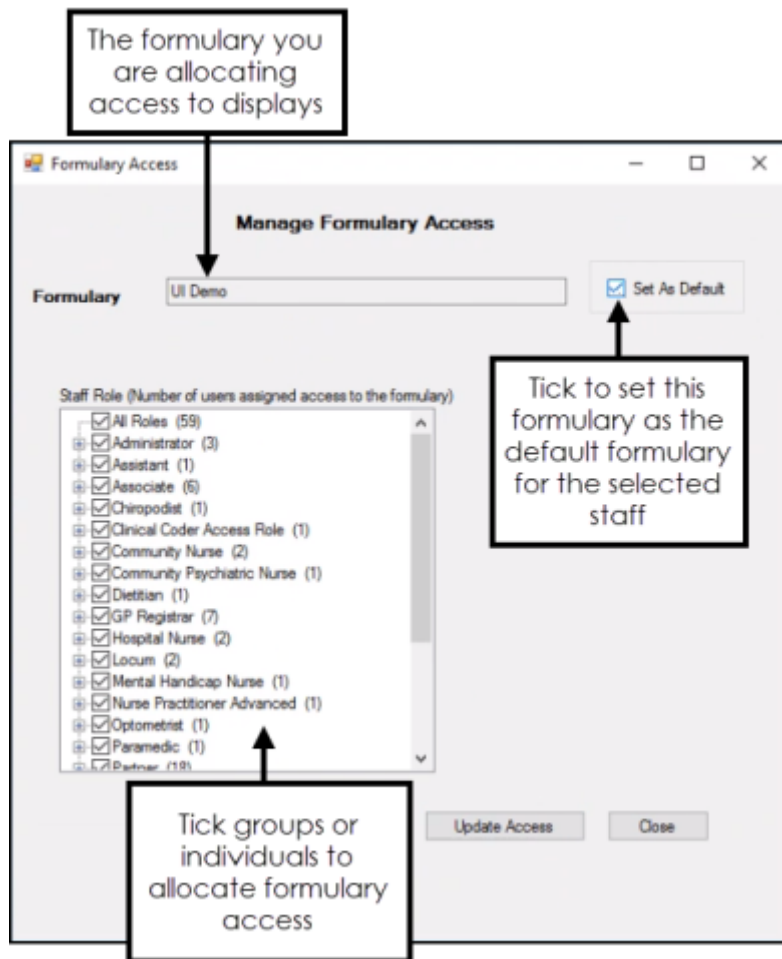
5. From **Staff Role**, tick the role based group to permit the whole group access to the formulary, or using **Expand** [⊞], locate the individual staff members required and tick as required.

6. Select **Set As Default** to set the selected formulary as the first one offered.

7. Select **Close**.

Your staff can now access all the formularies you have specified for them, if you set one as a default they are offered that one first.

💡 **Remember** - You can still prescribe away from the formulary if appropriate.

Running a Manual FMT Update

Cegedim Healthcare Solutions FMT updates are automatically processed overnight. However, if there is an urgent update that you need to process before the overnight synchronisation, you can run a manual update.

To run a manual update:

1. From the **Vision 3 Front Screen**, select **Control Panel- File Maintenance - Formulary** .

2. The **Manage Formulary Updates** screen displays:
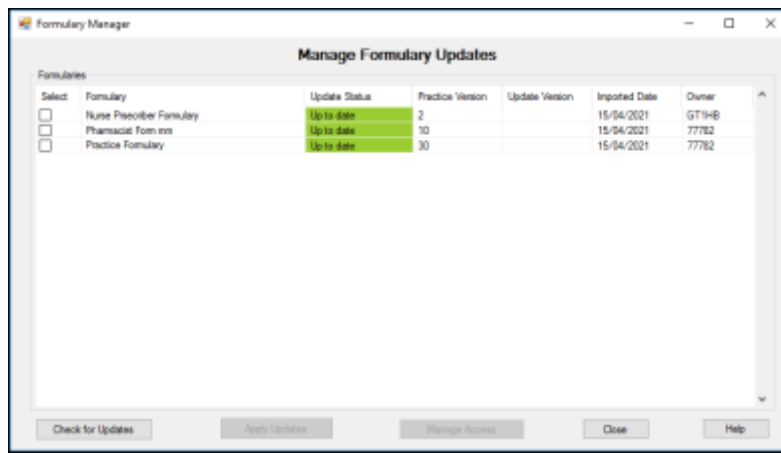
3. The **Manage Formulary** screen displays all the formularies available to you, select **Check for updates**.

4. Select **Check for updates**.

5. If there are any updates, the **Update Status** displays **Update Available** in yellow. Tick the line(s) to update and select **Apply Updates**.

6. Select **Close**.

> See the Cegedim Healthcare Solutions FMT Help Centre for details of creating and maintaining your own formularies.

Prescribing with Cegedim Healthcare Solutions FMT

If your practice uses the **Cegedim Healthcare Solutions Formulary Management Tool (FMT)** and you have been allocated access to one or more formularies, when you select an item to prescribe, you can select from your allocated formularies helping you choose from the most appropriate, evidence based and cost effective items from the Dictionary of Medicines and Devices (DM+D).

To use **Cegedim Healthcare Solutions FMT** from the **Therapy - Add** screens:

1. From **Consultation Manager**, with the appropriate patient selected and a consultation open, start adding a therapy in the usual way.

2. The **Therapy** screen has a new **Formulary** option, this initially displays your default formulary if one has been set. You can select any formulary that you have access to:
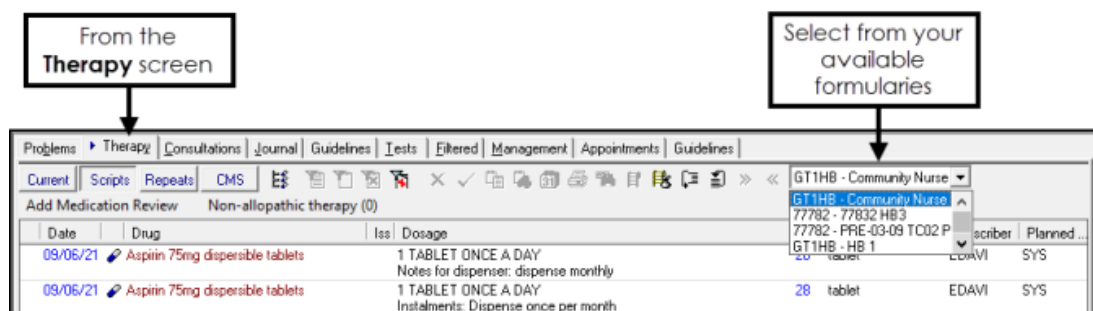
> ✏ **Note** - Your formulary selection in **Therapy** is retained by **Vision 3** until you update it.

3. You now have two options:

   - Select the item required in the usual way:

     - If there are no items in the formulary that match your criteria, the '*Do you want to search the main dictionary*' message displays, select **Yes** to search the main dictionary.

     - Select **F3**, or double click the drug line, to display **Select Drug** in the usual way, this defaults to formulary items only, remove the tick from **Dictionary** to see the full list, see **Using the Select Drug Screen** in the **Consultation Manager Help Centre** if required.
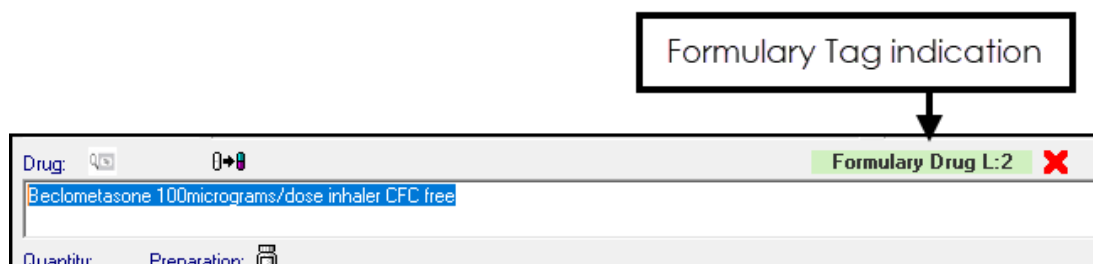
- Select **Tag Search** to select an item by **Tag:**
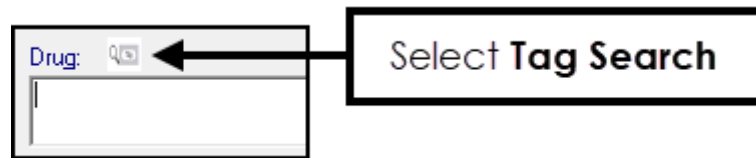
Items in a formulary can be allocated **Tags**, designed to enable condition and treatment groups within a formulary.

4. If you have selected an item by **Tag**, the Tag information displays above the **Drug** highlighted in green. It indicates the:

- Selected item has a **Formulary Tag**.

- Treatment list allocation if allocated.

- Patient matching status:

- A green tick for matches.

- A red cross for does not match:

5. Complete the **Therapy - Add** screen in the usual way.

 See **Selecting an Item using Cegedim Healthcare Solutions FMT Tags** on page **34** for details.

Selecting an Item using Cegedim Healthcare Solutions FMT Tags

If your practice uses the **Cegedim Healthcare Solutions Formulary Management Tool (FMT)** and you have been allocated access to one or more formularies, you can select an item based on a **Tag**.
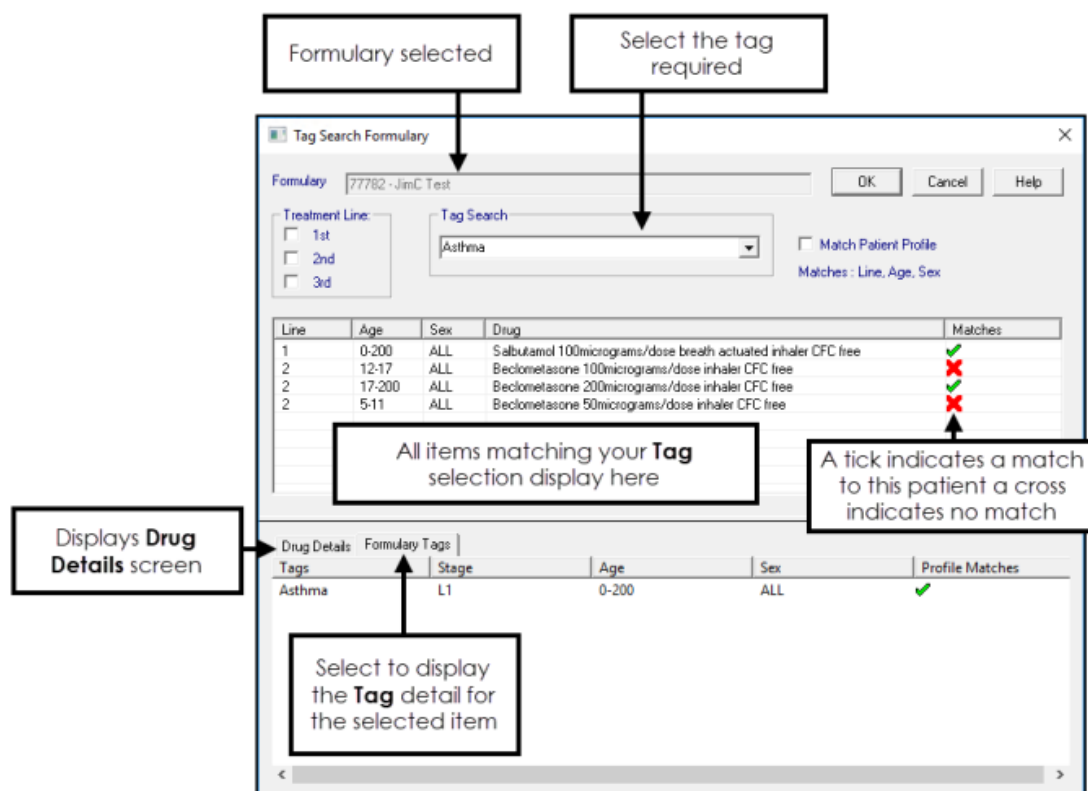
Items in a formulary can be allocated **Tags**, designed to enable condition and treatment groups within a formulary, for example, a **Tag** of UTI can added to all treatments for urinary tract infections in your formulary.

To select an item by **Tag**:

1. From the **Therapy - Add** screen, select **Tag Search:**
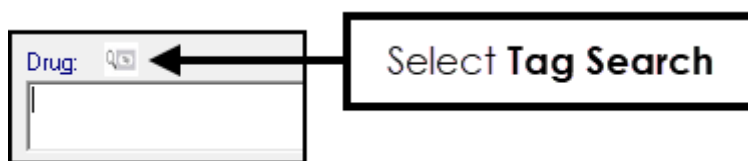
2. The **Tag Search Formulary** screen displays:

3. Select as required:

- **Formulary** - Displays the formulary you have selected. To update this, close the **Tag Search Formulary** screen and reselect from the **Formulary** option.

- **Treatment Line** - Inactive until you select a **Tag**. Select to display only treatments designated 1st, 2nd and/or 3rd line if required. For example, for an initial infection you may want to see 1st line treatment only, if this is a second presentation, you may want to see 2nd line treatment only.

> **Note** - **Treatment Lines** are optional, they may not exist for all or any items in your formulary.

- **Tag Search** - Start typing the tag required and a list of matching items displays, for example, 'pain' returns all **Tags** with the word 'pain' in them. Select from the available list of **Tags**. The items linked to the selected Tag display. The list is filtered to match the selected patient sex and age profile, to remove the profile match, remove the tick in **Match Patient Profile**.

> **Note** - The list of **Tags** is defined by the owner of the formulary, we recommend formularies follow a standard format to make finding the item required quick and easy.

- **Match Patient Profile** - Selected by default, remove the tick to see all linked formulary items regardless of their suitability for the selected patient.

- **Matching Items list** - The list of returned items based on your selections. The following displays:

    - **Line** - The treatment line of the item.

    - **Age** - The suitable age range of this item.

    - **Sex** - The sex this item is suitable for.

    - **Drug** - The item linked to the tag selected.

    - **Matches** - Whether the item matches the profile of the selected patient:

        - ✅ Tick, indicates the item matches the selected patient profile.

        - ❌ Cross, indicates the item does not match the patient profile.

> 💡 **Remember** - These are based on the recommendations set by the owner of the formulary. You still have the clinical freedom to select items from outside the formulary if required, from the **Select Drug** screen, simply tick **Dictionary** to display the full **Dictionary of Medicines and Devices (DM+D).**

- **Drug Details** - Displays by default, with all the details about the item you have highlighted above.

- **Formulary Tags** - Select to display any other **Tags** linked to this item.

4. Highlight the item required and select **OK**.

5. You are returned to the **Therapy - Add** screen.

> ➡️ See **Prescribing with Cegedim Healthcare Solutions FMT** on page **32** for details.

Instalment Dispensing - Scotland only
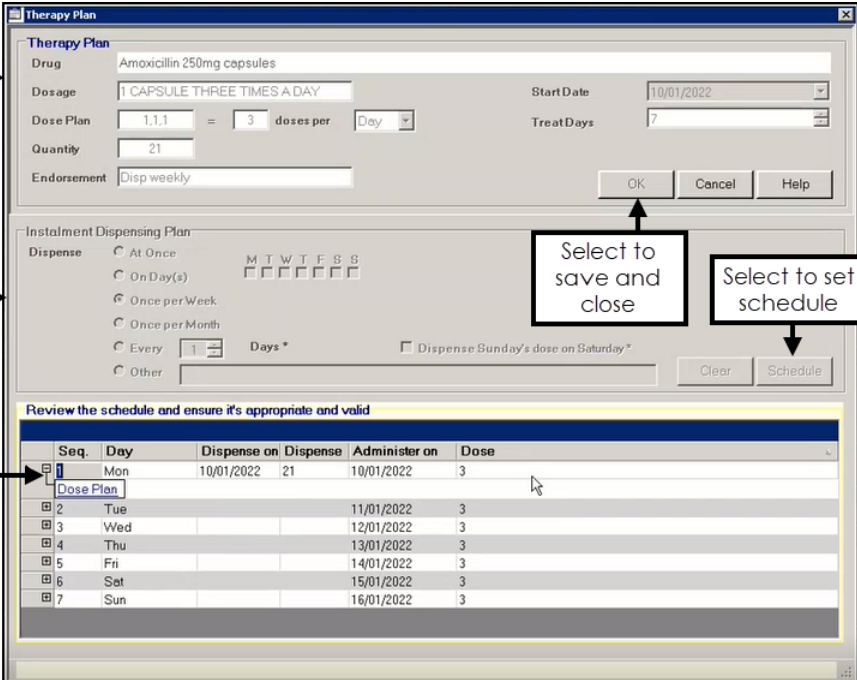
The **Therapy Plan** screen enables you to set up and manage an **Instalment Dispensing Plan** for an item you are prescribing.

Acute Prescribing

To access and use the **Therapy Plan** screen for an acute prescription:

1. From the **Acute Therapy - Add** screen, complete the **Drug**, **Quantity** and **Dosage** sections in the usual way.

2. Select **Instalment dispensing** ▦ and the **Therapy Plan** screen displays:

3. Complete as required:

- **Therapy Plan**:

    - **Drug** - Populated from the item selected on the **Therapy - Add** screen, cannot be updated from here.

    - **Dosage** - Populated from the dosage set on the **Therapy - Add** screen, cannot be updated from here.

    - **Dose Plan** - Populated from the dosage set on the **Therapy - Add** screen but can be updated. You can detail the way the medication should be taken. Doses are separated by a comma, for example, 2,2,2,2 indicates take two four times a day, 1,2,1,2 indicates the first dose of the day is one, the second is two, the third is one and the final is two. Enter the dose plan, number of doses per time frame and select the time frame as required. Updating the **Dose Plan**, automatically updates **Treat Days**:
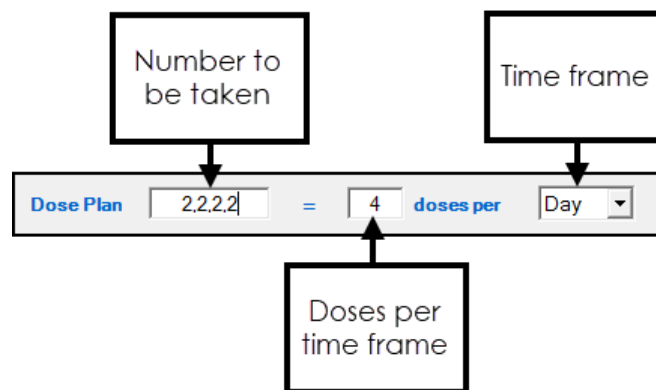
💡 **Training Tip** - If you update the **Dose Plan** you must check and if necessary manually update the dosage set on the **Therapy - Add** screen.

    - **Quantity** - Completes from the quantity set on the **Therapy - Add** screen, update if required and **Treat Days** automatically updates.

    - **Endorsement** - Complete as required.

    - **Start Date** - Defaults to today, update if you want to delay the dispensing of this item.

    - **Treat Days** - Automatically calculates the number of days for the treatment based on the **Dosage** and the **Quantity** selected, update if required and **Quantity** automatically updates.

ⓘ **Important** - We recommend you enter the details of the dispensing plan to print on the right

hand side of the prescription for your patient's reference.

- **Instalment Dispensing Plan**:
  - **Dispense** - Select the time frame from the options available and then specify the days where appropriate.
    - **Dispense Sunday's dose on Saturday** - Where a Sunday dose is indicated, tick to authorise this to be dispensed on a Saturday.
  - **Clear** - Select to clear a schedule and start again.
  - **Schedule** - Select to display the **Review the schedule and ensure it's appropriate and valid** pane. Check the details and add a **Dose Plan** line by line if appropriate:
    a. Select **Expand** next to the line required and then select **Dose Plan:**
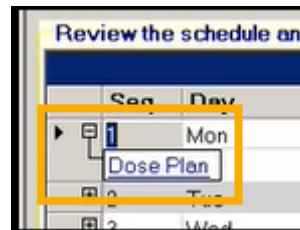
    b. The dose details for the day selected display. In the **Patient Instruction** column enter the dose plan instructions, for example, After meals:
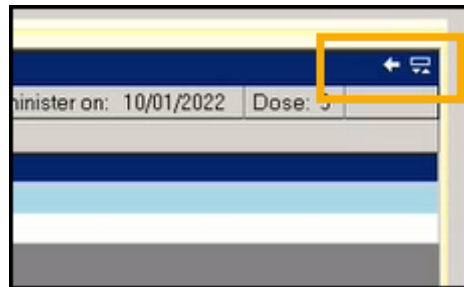

 Note - Dose Plans do not display in Notes for Patient.

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c. Select the back arrow in the top right corner of the **Review the schedule and ensure it's appropriate and valid** pane to return to the schedule:

d. Repeat this process for each line until complete.

> ℹ️ **Important** - You must select **Schedule** to apply any selected endorsement.
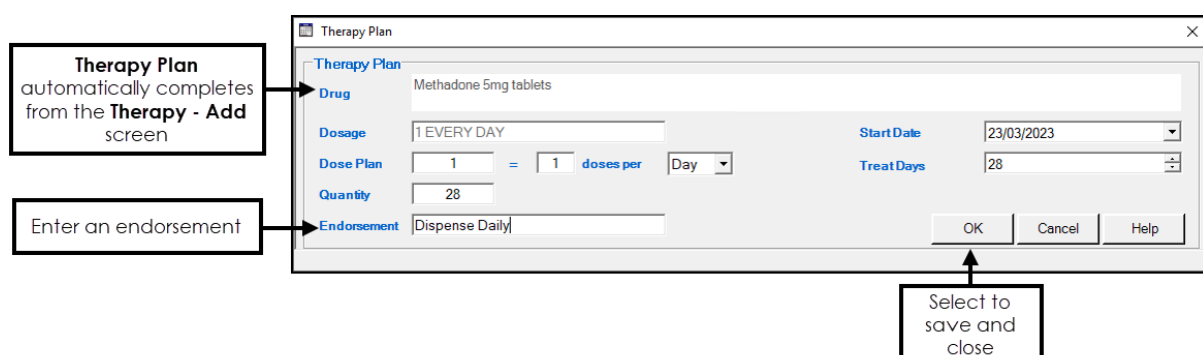
4. Select **OK** to save.

5. The **Please confirm you have reviewed the therapy plan** message displays, select **Yes** to confirm.

6. You are returned to the **Therapy - Add** screen and **Instalment Dispensing** displays a red tick ▣.

7. Check the medication details and then select **OK** to complete.

8. Select **Close**.

9. The usual **Drug Check Results** screen displays for checking, select **Yes** and **Proceed** once you have checked the warnings and recorded any comments.

The prescription is printed and sent electronically in the usual way.

Repeat Prescribing

To access and use the **Therapy Plan** screen for a Repeat prescription:

1. From the **Repeat Master - Add** screen, complete the **Drug**, **Quantity** and **Dosage** sections and the number of **Repeats** in the usual way.

2. Select **Instalment dispensing** ▦ and the **Therapy Plan** displays:

3. In **Endorsement**, enter appropriate instructions.

4. Select **OK** to save.

5. The **Please confirm you have reviewed the therapy plan** message displays, select **Yes** to confirm.

6. You are returned to the **Repeat Master - Add** screen and **Instalment Dispensing** displays a red tick .

7. Check the medication details and then select **OK** to complete.

8. Select **Close**.

9. The usual **Drug Check Results** screen displays for checking, select **Yes** and **Proceed** once you have checked the warnings and recorded any comments.

Issue the Repeat in the usual way.