



# Vision 3 DLM 890 Release Guide

Version 1.6

23<sup>rd</sup> April 2024



**Copyright © 2023 Cegedim Healthcare Solutions**

All Rights Reserved

Cegedim Healthcare Solutions is the trading name of Cegedim Rx Ltd and In Practice Systems Limited.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of Cegedim Healthcare Solutions.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by Cegedim Healthcare Solutions, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

Cegedim Healthcare Solutions reserves the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

Registered name: Cegedim Rx Ltd. Registered number: 02855109

Registered name: In Practice Systems Limited. Registered number: 01788577

Registered address: Studio F5 Battersea Studios 1, 82 Silverthorne Road, London SW8 3HE

Website: <https://www.cegedim-healthcare.co.uk/>



# Contents

<b>Vision 3 Release DLM 890 .....</b>	<b>4</b>
Summary of Changes .....	4
Returning Patients - Scotland Only .....	13
Bulk Registration - Scotland Only .....	16
Using LibreOffice in Vision 3 - Scotland only .....	28

# Vision 3 Release DLM 890

## Summary of Changes

**Vision 3** release **DLM 890** contains the following features and improvements:


### All Countries

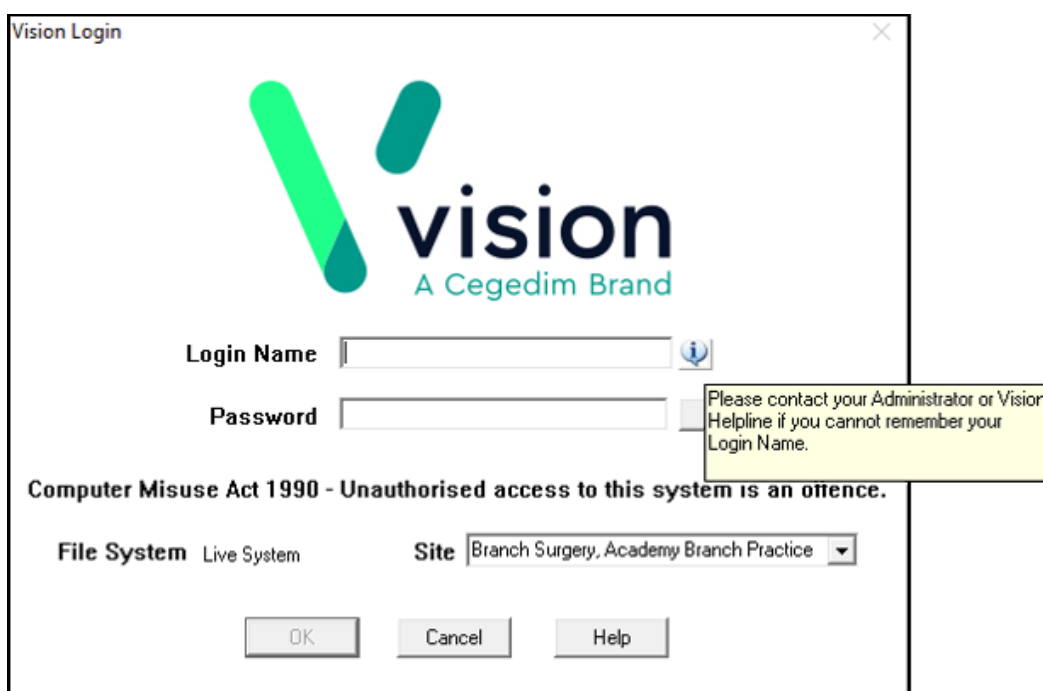
#### Vision 3 Log in

- **Login Name List** - To improve the security of your **Vision 3** system and your patient data, the **Login Name** list has been removed from the **Vision Login** screen. You must now type in your **Login Name** as set up in **Management Tools - Control Panel - Security**. To support this change the **Show list of users** option available from the **Security Settings** screen has been removed, see [Security Settings](#) in the **Management Tools Help Centre** for further details.

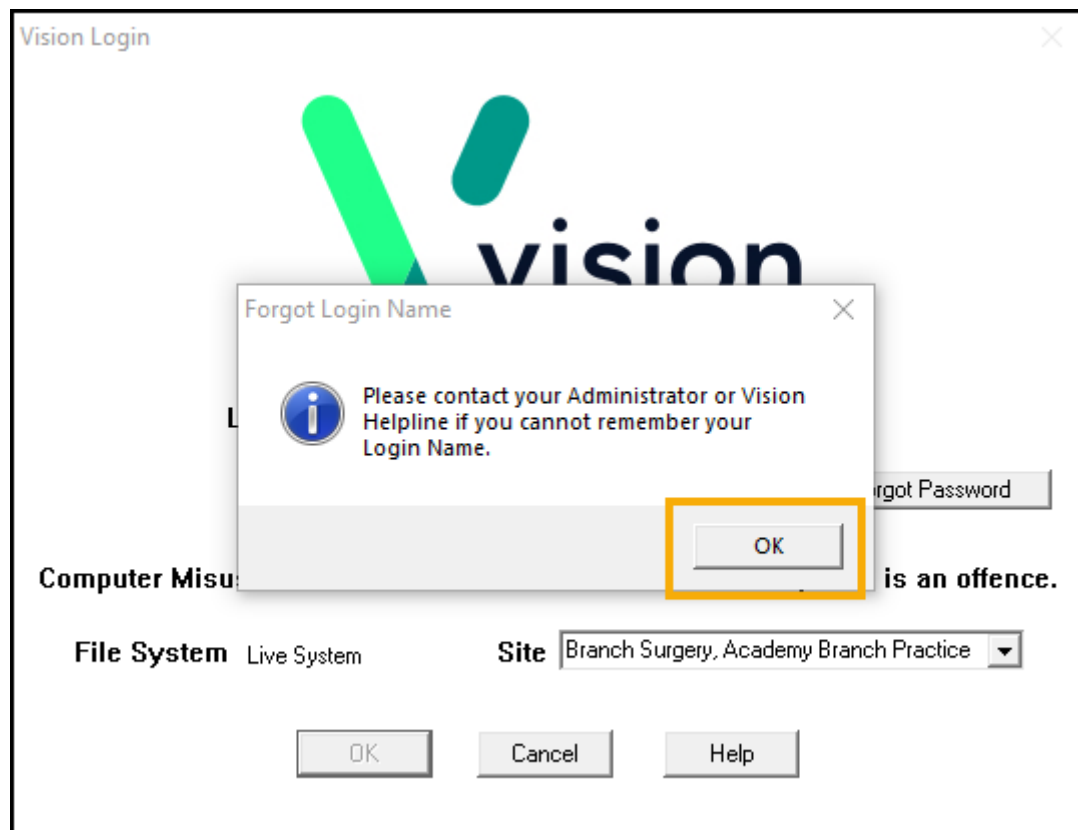


**Training Tip** - If you have forgotten your **Login Name**, your system administrator can find it for you from **Management Tools - Control Panel - Security**, see [Viewing the Current User List](#) in the **Management Tools Help Centre** for details.

The **Login** screen now has an **Information Point**  alongside **Login Name**, hover over it too see the tooltip or select to display the 'Please contact your Administrator or Vision Helpline if you cannot remember your Login Name.' message:

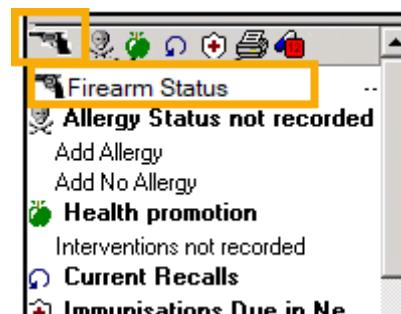


If you select the **Information Point**, you must select **OK** to close the message:



## Consultation Manager

- **Immunisations** - As part of a clinical consistency review of **Vision 3** and **Vision Anywhere**, we have updated any historic compound/combined immunisation data initially recorded in **Vision Anywhere** and written back to the patient record as one item. This data is now split out into its constituent immunisations, for example an MMR initially recorded in **Vision Anywhere** and written back to the patient record as one entry, is now split into three entries, Measles, Mumps and Rubella.
- **Firearms and Shotgun Certificate** - When you record a Firearms and Shotgun Certificate on a patient record, a **Firearm Status** notification displays in the **Alert Pane**:



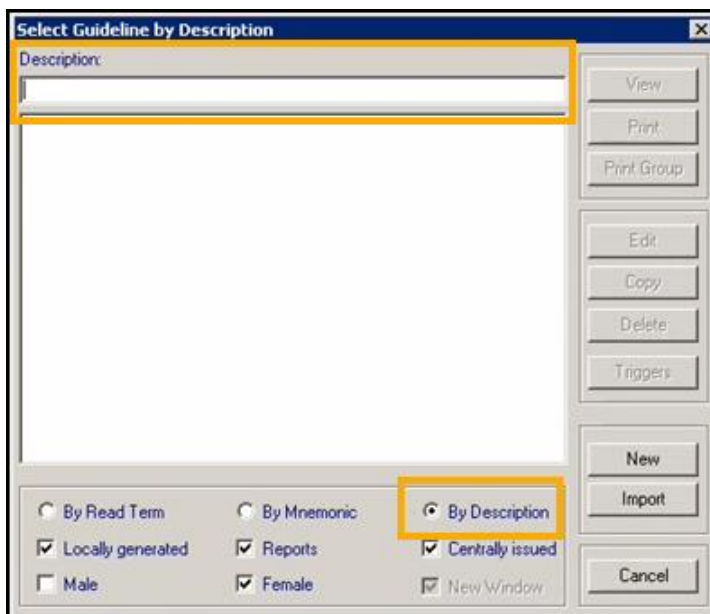
The following clinical terms trigger the warning:

- 9D8.. Shotgun application cert
- 9D81. Shotgun applic cert-not paid
- 9D82. Shotgun applic cert-fee paid
- 9D8Z. Shotgun applic cert NOS
- 9DP.. Has firearm certificate
- 9DP0. Has shotgun certificate

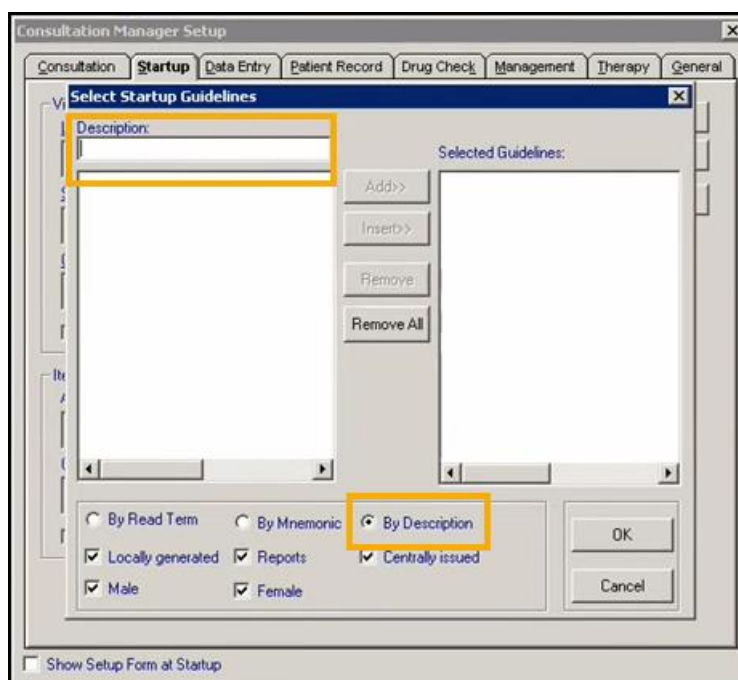
You can select the **Firearm Status** in the **Alert Pane** to display all firearms related details in the Filter tab, including the following terms:

- 9DT.. No longer has firearm certificate
- 9DV.. No longer has shotgun certificate

- **Guidelines** - You can now search for **Guidelines** by the **Guideline Description**. A new **By Description** option displays in:
  - **Guidelines - Select Guideline:**



- **Consultation Manager Setup - Startup - Views Displayed When a Patient is Selected - Guidelines - Edit:**

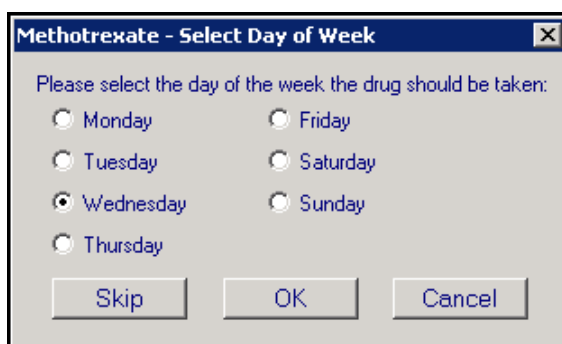



**Note** - Full words are not required, for example, pox may return **Smallpox**, **Monkeypox** and **Chickenpox**.

- **Date selections** - The issue of '\$\$\$' automatically being inserted when setting or updating a date within a Guideline has been addressed.

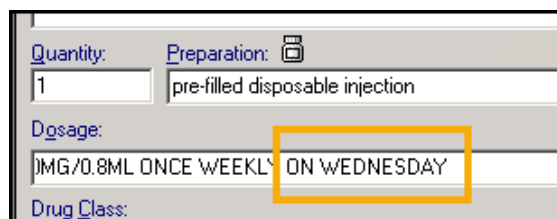
- **Medication Review Structured Data Area (SDA)** - Clinical term **8B3S200 Structured Medication Review** now defaults to, and can be selected from the **Medication Review SDA**.
- **Methotrexate Prescriptions** - The following has been updated:
  - To support the guidance and recommendations included in a MHRA Drug Safety Update (DSU) published on GOV.UK [here](#), for Methotrexate prescriptions with a once-weekly dosing schedule, the day of the week agreed with the patient to take their Methotrexate on can now be recorded.

When you prescribe a methotrexate item, and select **OK**, the **Methotrexate - Select Day of Week** screen displays:



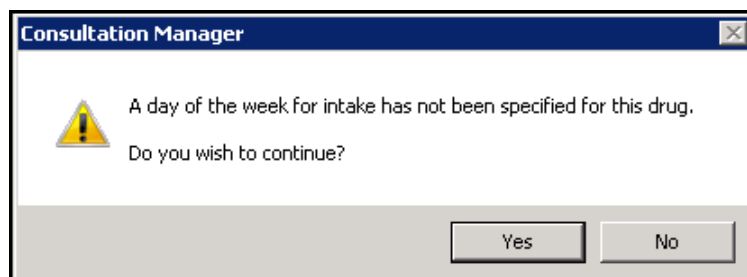
Either:

- Select a day to append to the **Dosage** and select **OK**. The day selected is added to your dosage, for example 'ON WEDNESDAY':



Or

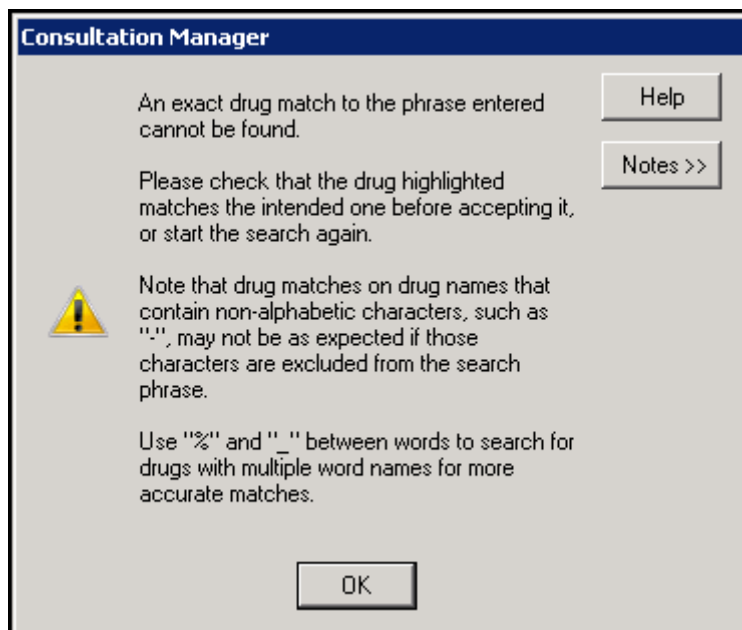
- Select **Skip** to bypass adding a day. The 'A day of the week for intake has not been specified for this drug. Do you wish to continue?' warning displays if you do not enter a day in the dosage, select **Yes** to continue or **No** to select a day:



- The issue of **Dosage** reverting to default when updating Methotrexate prescriptions is addressed.



- **Therapy - Exact Drug Warning** - When searching for a drug name, if an exact drug cannot be found the following message displays:



Select **OK** and check the item selected is the correct one.



See [Using the Select Drug Screen](#) in the **Consultation Manager Help Centre** for details on searching for drugs.

- **Units of Measure** - The following default units of measure are updated:
  - **Head circumference centile** and **Jugular Venous Pressure** are now **cm** instead of **cms**.
  - **Infant details - Mother** is now **kg** instead of **kgs**.

### Vision 3 Front Screen

- **Options** - To improve the security of your clinical data and prevent the accidental download of malicious software, the **Install .Net Framework** option is no longer available from the **Vision 3 Front Screen - Options** menu.

## Registration

- **Online Services** - The issue of a partial online services account being created when you update the **Online Services** tab on a patient record without selecting **Create Online Account**, has been addressed.


## Patient Facing Services (Patient Services and My Health Online)

- **Branch Site Sessions** - The issue of **Sessions** allocated to a specific Branch not retaining the Branch details, has been addressed. Your patients can now use the **Specific location** option to filter available appointments.


## Help Centres

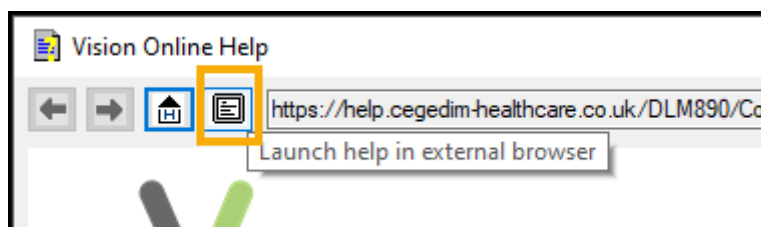
- **Accessing Help Centres from Vision 3** - If you press **F1** on your keyboard or select **Help** from any **Vision 3** module or screen, you can no longer alter the web address that displays.

---


 **Note** - This does not stop you from navigating the **Help Centre** you have opened.

---


Select **Launch help in external browser**  to open the **Help Centre** topic within your default browser, for example, Microsoft Edge:

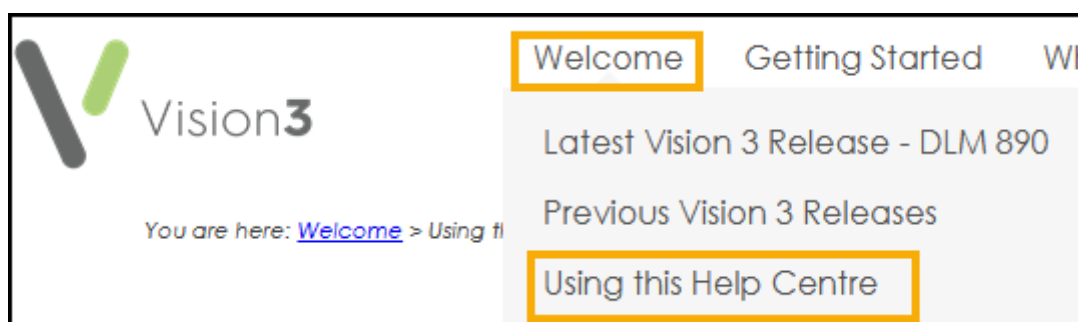



---

 **Note** - The **Help** screen within **Vision 3** closes down automatically when you select to launch it in your browser.

---

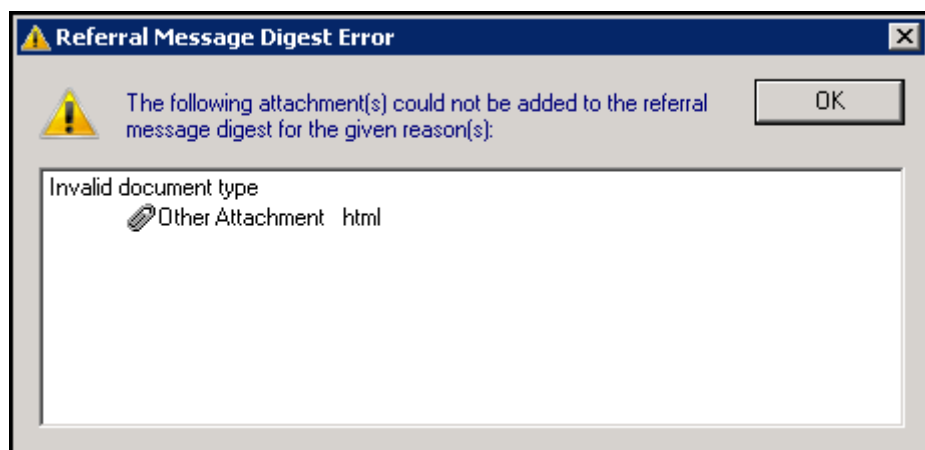
- **Help** - The **Help**  option has been removed. If you need help with using one of our **Help Centres**, please refer to the **Welcome - Using this Help Centre** topic from any **Help Centre**:



## England only

### Consultation Manager

- **e-Referrals** - As per NHS England instruction, you can no longer upload .HTML or .HTM files to the e-Referrals Service. **Vision 3** therefore no longer allows the attachment of .HTML or .HTM files. Should you try to upload files of this type the following message displays, select **OK** to close:



- **GP Appointments Extract** - The automatic **GP Appointments Extract** that is run weekly, has been extended to include **Exception Reasons**.

## England, Wales and Northern Ireland

### Management Tools

- **Repeat Limit** - The issue restricting the maximum number of repeat issues to 366, has been addressed. You can now set the maximum number of repeat issues for a single master up to 999.



See [Settings - Therapy Tab](#) in the **Management Tools Help Centre** for further details.

## Scotland only

### Registration

- **Returning Patients** - The way **Vision 3** handles returning patients in Scotland has been updated. If a patient has clinical term of **92...00 Patient de-registration** with 'by transfer of GP to GP electronic record' in **Comments**, recorded in their record, they cannot be reactivated via **Registration** and a new record must be created. The original record is marked as 'Superseded Record'.



See [Returning Patients - Scotland Only](#) on page **13** for full details.

---

- **Organ Donor Consent** - Following the implementation of the Human Tissue (Authorisation) (Scotland) Act 2019:
  - The **Registration - Voluntary consent to organ donation** screen no longer displays at the end of a patient registration.
  - No organ donor messages are sent.

### Registration Links

- **Bulk Registration** - The **Bulk Registration** facility is being introduced to allow practices that are closing down to create bulk export files that can be imported in bulk into a new practice as specified by the relevant Health Board.



See [Bulk Registration - Scotland Only](#) on page **16** for details.

---

### Mail Manager

- **CMS and AMS Messages** - If you need to reprocess a CMS or AMS message from **Mail Manager**, **Vision 3** now marks the original message as **Withdrawn** and automatically creates and sends a new message with the same reference.

### Word Processing

- **LibreOffice** - **Vision 3** is now ready for you to use **LibreOffice** as your word processor of choice.



See [Using LibreOffice in Vision 3](#) on page **28** for details.

---

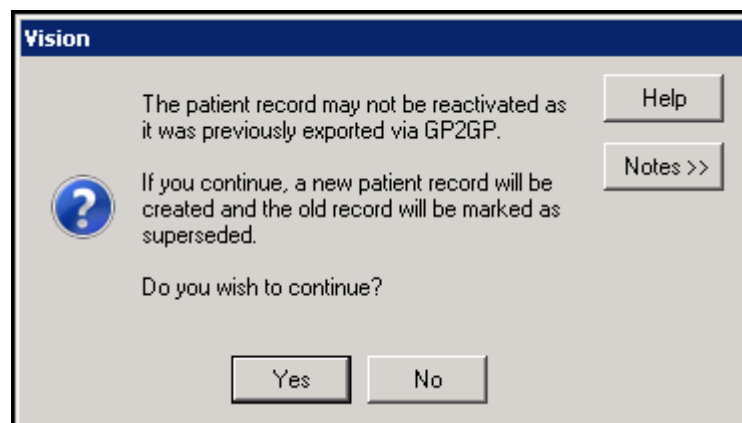
## Returning Patients - Scotland Only

The way **Vision 3** handles returning patients in Scotland has been updated.

If a patient has clinical term of **92...00 Patient de-registration** with 'by transfer of GP to GP electronic record' in **Comments**, recorded in their record, they cannot be reactivated via **Registration** and a new record must be created.

**Vision 3** automatically checks the patient record when you start the re-registration process:

1. From the **Vision 3 Front Screen**, select **Registration** and find the returning patient in the usual way, see [Selecting a Patient](#) in the **Registration Help Centre** if required.
2. With the relevant patient details on your screen, select **Action - Re-registration**.
3. Check the details and update if necessary.
4. Select **OK**.
5. **Vision 3** automatically checks the patient record, if a clinical term of **92...00 Patient de-registration** with 'by transfer of GP to GP electronic record' in **Comments**:
  - is recorded in the patient record, a message displays advising you 'The patient record may not be reactivated as it was previously exported via GP2GP. If you continue, a new patient record will be created and the old record will be marked as superseded.':



- Select **Yes** to continue, and run through the registration in the usual way, or
- **No** to cancel the re-registration.

- is not recorded in the patient record, you should continue to re-register the patient in the usual way, see [Re-Registration](#) in the **Registration Help Centre** for details if required.

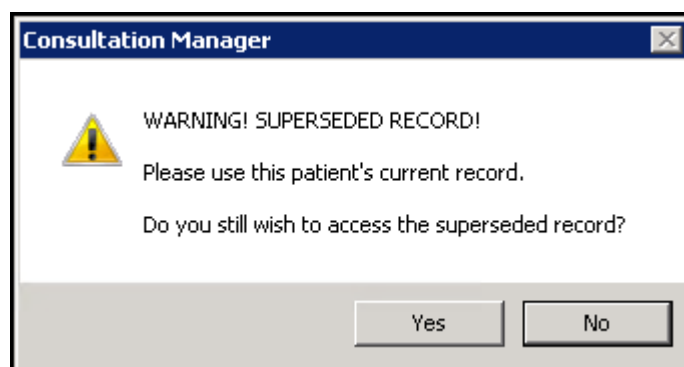
If you do create a new record using **Re-registration**, the original record automatically updates to:

Surname	First Name	Date of Birth	PrNHS number	Chi_no
> Superseded Record	Aaren Visakhan	23/01/1985		
Superseded Record	Aaron Amarissa	13/10/1984		
Superseded Record	Abdolvahabsadreddin	03/08/2006		
Superseded Record	Adelia Picciano	23/09/1957		
Superseded Record	Akrigg Hunter	18/05/2008		
Superseded Record	Al-Binali Hazeela	09/05/1942		

- **Surname** - 'Superseded Record'
- **First Name** - Original 'first name' 'surname'

The **CHI Number** is removed from the original record as it is now used in the newly created patient.

If you try to access a superseded record anywhere is **Vision 3**, a 'WARNING! SUPERSEDED RECORD! Please use this patient's current record. Do you still wish to access the superseded record?' message displays:



Select:

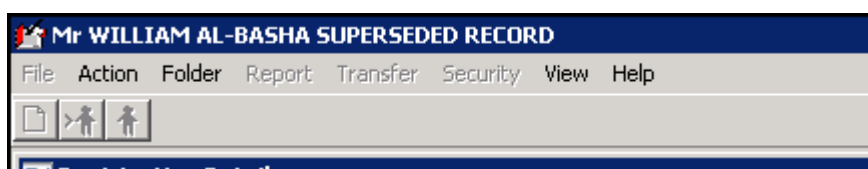
- **Confirm** to continue to the superseded record, or



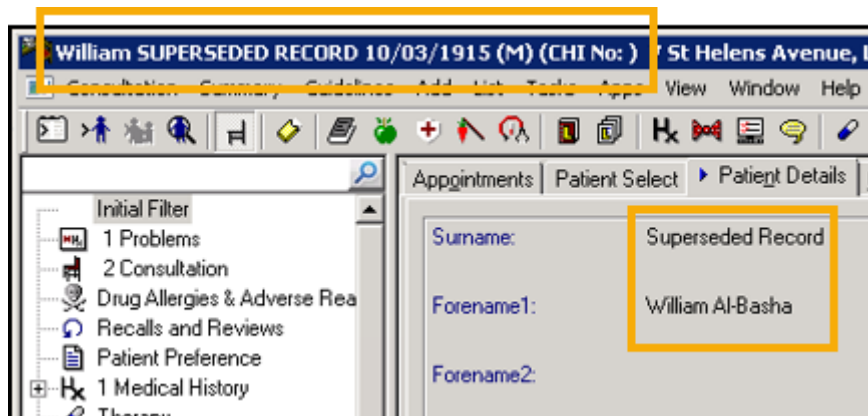
**Remember** - A notification is sent to your Privacy Officer when you access inactive records.

- **Cancel** to select the active record.

A superseded patient name displays as 'Title First Name Surname Superseded Record', for example, 'Mr Joseph Kane Superseded Record' in **Registration**:



In **Consultation Manager**, a superseded patient name displays as '*First Name Surname Superseded Record*', with a date of birth but no CHI number:



## Bulk Registration - Scotland Only

The **Bulk Registration** facility is being introduced to allow closing practices to create a bulk export file of patient demographic information that, once processed and split out by your Health Board, can be bulk imported into a new practice. This is designed to speed up the process of registering large numbers of patients.

This process is split into two parts:

- The creation of the download file by the closing practice - See [Creating a Bulk Registration Export File](#) on page 16 for details.
- The importing of the upload file by the receiving practice - See [Importing a Bulk Registration File](#) on page 22 for details.

### Creating a Bulk Registration Export File

If your practice is closing, you need to create an export file of your registered patients to enable their new practices to import and process them quickly and easily.

Please be aware that only patients with the following **Registration Status** are included in an export file:

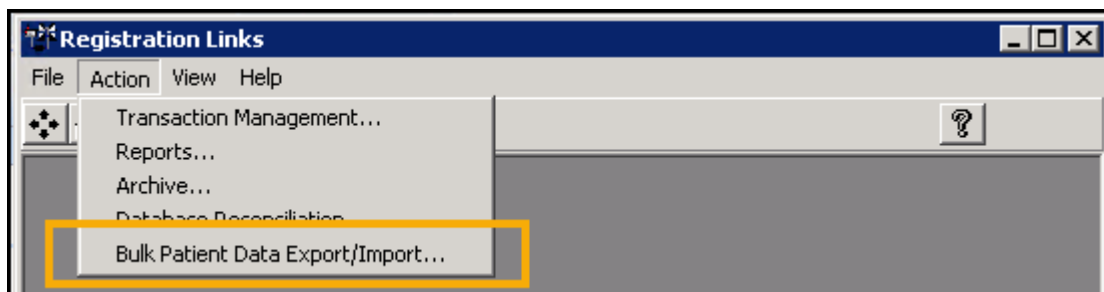
- **Permanent**
- **Temporary Residents - Long stay** - Active only.

To create and export a list of your patient's demographic information as a CSV file:

1. From the **Vision 3** front screen, select **Messaging - Registration Links**

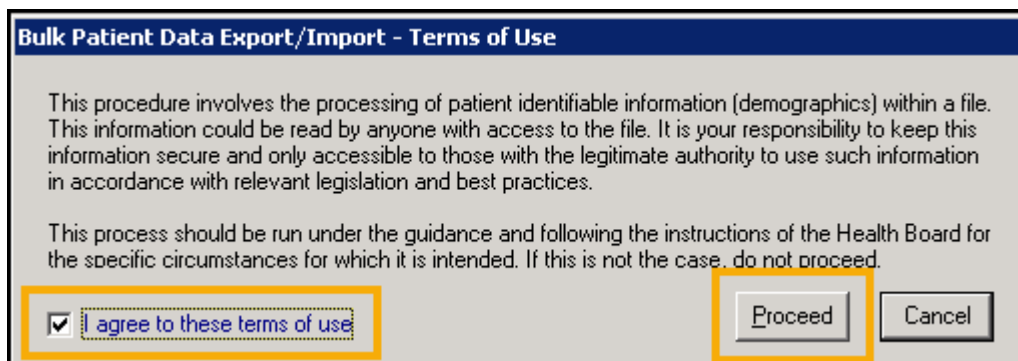


2. Select **Action - Bulk Patient Data Export/Import:**





- The **Bulk Patient Data Export/Import - Terms of Use** screen displays, read the message, tick **I agree to these terms of use** and then select **Proceed**:



**Bulk Patient Data Export/Import - Terms of Use**

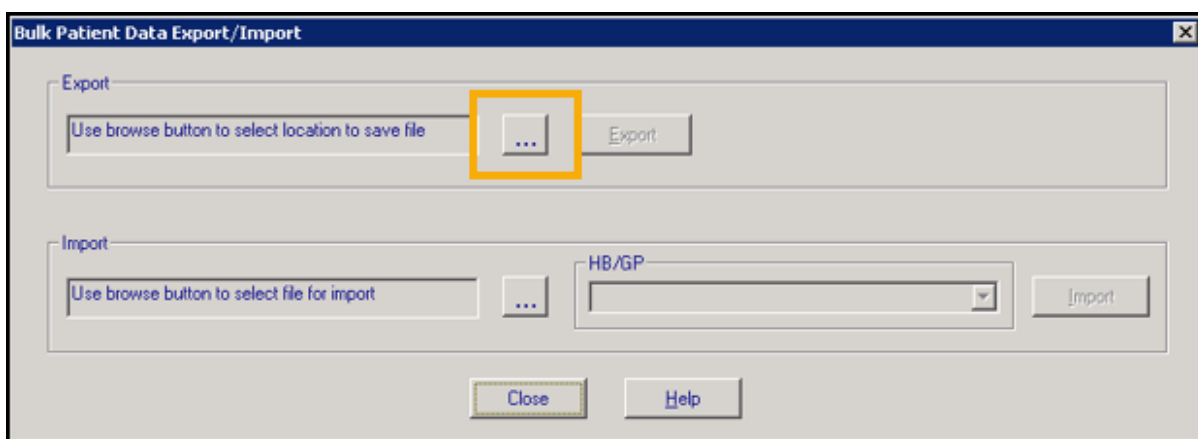
This procedure involves the processing of patient identifiable information (demographics) within a file. This information could be read by anyone with access to the file. It is your responsibility to keep this information secure and only accessible to those with the legitimate authority to use such information in accordance with relevant legislation and best practices.

This process should be run under the guidance and following the instructions of the Health Board for the specific circumstances for which it is intended. If this is not the case, do not proceed.

☒ I agree to these terms of use

Proceed Cancel

- The **Bulk Patient Data Export/Import** screen displays, under **Export** select **Browse** :



**Bulk Patient Data Export/Import**

**Export**

Use browse button to select location to save file

...

Export

**Import**

Use browse button to select file for import

...

HB/GP

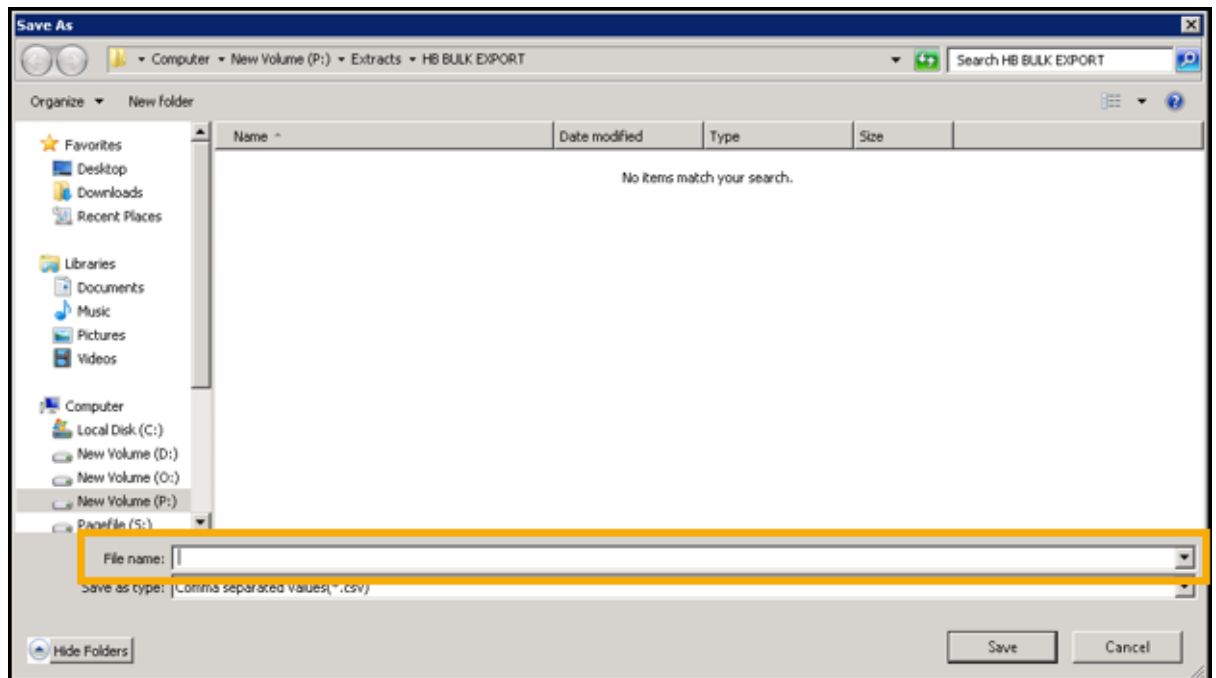
Import

Close Help

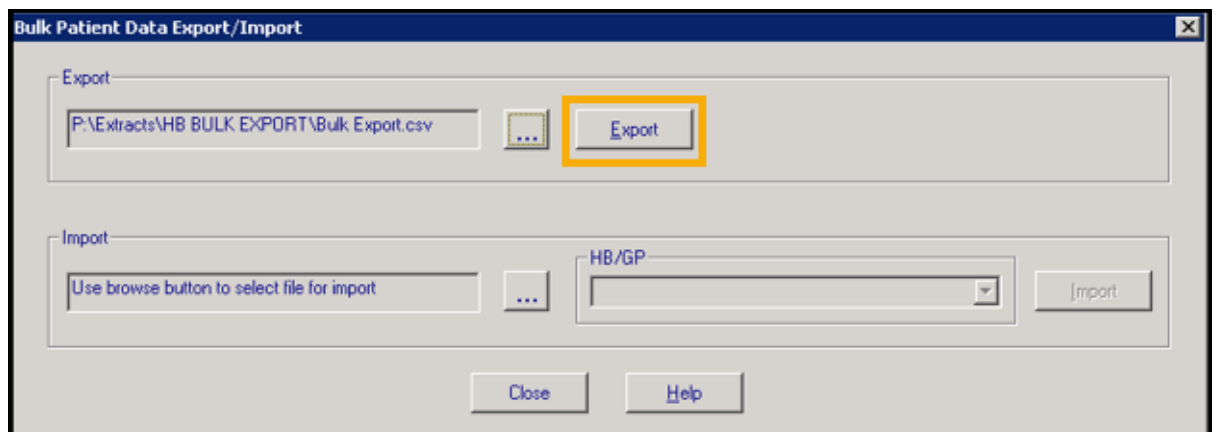
- The **Save As** screen opens in **P:\Extracts\HB BULK EXPORT**, enter a name for the export file in **File name**:



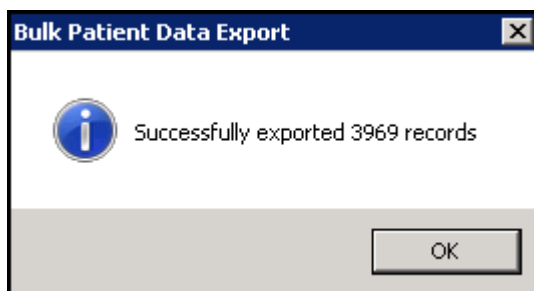
**Training Tip** - It is strongly recommended that you name your file 'HB Bulk Export nnnnn' where nnnnn is your NACS code.



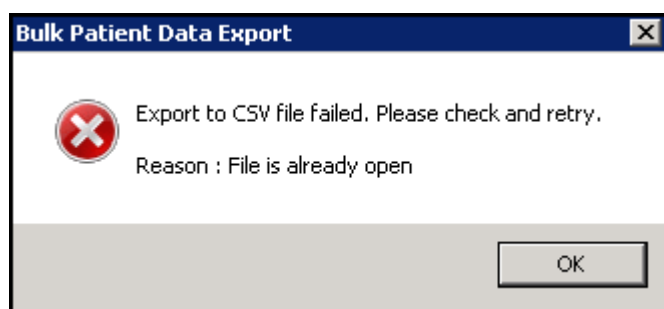
6. Select **Save** to save the export file.
7. You are returned to the **Bulk Patient Data Export/Import** screen, select **Export**:



8. The export process starts, once it has run, the **Bulk Patient Data Export - Successfully exported nnnnn records** message displays, where nnnnn is the number of patient records exported, select **OK**:



If there is a problem with the export, the **Bulk Patient Data** error message displays detailing the issue:



An **Event Log** entry is made for any export attempt:


Date	Time	User	Event	Patient	WorkStation	Detail
01/11/2022	5:42:56am	Eagle,B...	Other event		LWIS-TEST22	Bulk patient export - Successful export of 9601 records from 77787 practice.
01/11/2022	5:36:31am	Eagle,B...	Other event		LWIS-TEST22	Bulk patient export - Successful export of 9601 records from 77787 practice.
<b>Detail</b>						
Date	Time	User	Event	Patient	WorkStation	Detail
01/11/2022	5:42:56am	Eagle,Bb, Dr Bob, [BEAGL]	Other event		LWIS-TEST22	Bulk patient export - Successful export of 9601 records from 77787 practice.

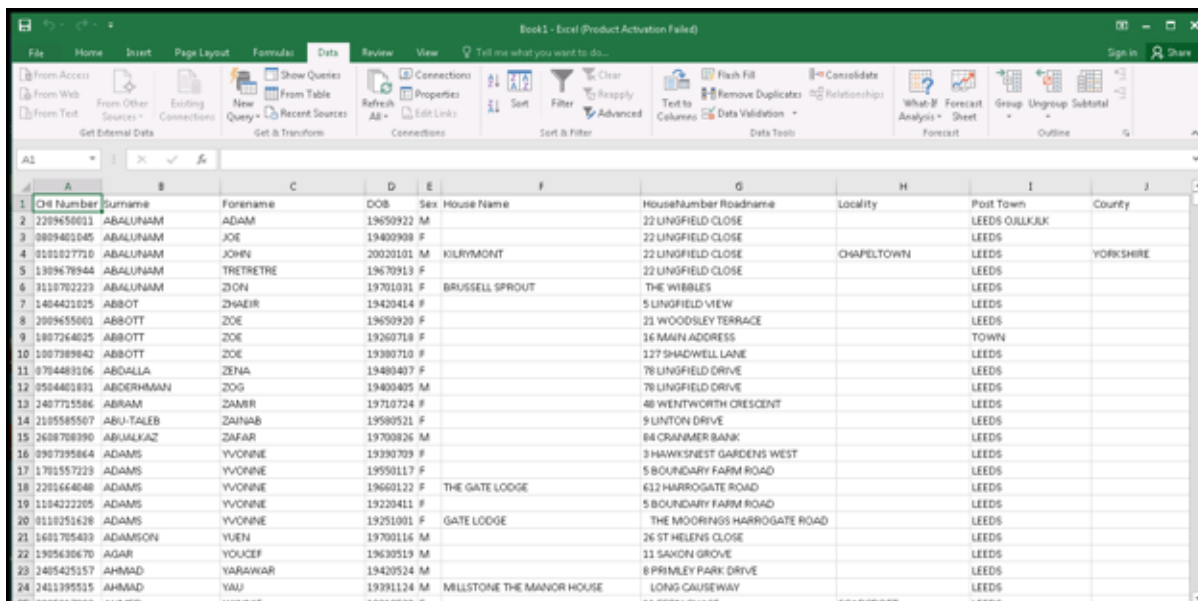
Date	Time	User	Event	Patient	WorkStation	Detail
01/11/2022	9:04:02am	Eagle,B...	Other event		LWIS-TEST22	Bulk patient export - Unsuccessful export from 77787 practice. Reason: File is already open
01/11/2022	9:06:14am	Eagle,B...	Other event		LWIS-TEST22	Bulk patient export - Successful export of 9601 records from 77787 practice.
<b>Detail</b>						
Date	Time	User	Event	Patient	WorkStation	Detail
01/11/2022	9:04:02am	Eagle,Bb, Dr Bob, [BEAGL]	Other event		LWIS-TEST22	Bulk patient export - Unsuccessful export from 77787 practice. Reason: File is already open

You can now forward a successful export on to your Health Board in the format required.

## Viewing an Export File

If you want to view the export file created:

1. From your remote desktop, select **File Explorer**  and navigate to **P:\Extracts\HB BULK EXPORT**.
2. Double click or highlight the file required and select **Open** to display the contents:



	A	B	C	D	E	F	G	H	I	J
	Ch# Number	Surname	Forename	DOB	Sex	House Name	HouseNumber Roadname	Locality	Post Town	County
1	2209650013	ABALUNAM	ADAM	19650922	M		22 LINGFIELD CLOSE		LEEDS OULDKUK	
2	08094001045	ABALUNAM	JOE	19400908	F		22 LINGFIELD CLOSE		LEEDS	
3	0101027710	ABALUNAM	JOHN	20020101	M	KILRYMONT		CHAPELTOWN	LEEDS	YORKSHIRE
4	1309678944	ABALUNAM	TRETRE	19670913	F		22 LINGFIELD CLOSE		LEEDS	
5	3110702223	ABALUNAM	ZION	19701031	F	BRUSSELL SPROUT	THE WIBBLES		LEEDS	
6	1404421025	ABBOTT	ZHAIR	19420414	F		5 LINGFIELD VIEW		LEEDS	
7	2009655001	ABBOTT	ZOE	19650920	F		21 WOODLEY TERRACE		LEEDS	
8	1807264025	ABBOTT	ZOE	19260718	F		16 MAIN ADDRESS		TOWN	
9	1007389842	ABBOTT	ZOE	19380710	F		127 SHADWELL LANE		LEEDS	
10	0704489106	ABDALLA	ZENNA	19480407	F		78 LINGFIELD DRIVE		LEEDS	
11	05044001031	ABDERHMAN	ZOG	19400405	M		78 LINGFIELD DRIVE		LEEDS	
12	2407755586	ABRAM	ZAMIR	19710724	F		48 WENTWORTH CRESCENT		LEEDS	
13	2105585507	ABU-TALEB	ZAINAB	19580521	F		9 LINTON DRIVE		LEEDS	
14	2608708090	ABULKAZ	ZAFAR	19700826	M		84 CRANMER BANK		LEEDS	
15	0907395864	ADAMS	YVONNE	19390709	F		3 HAWKSNEST GARDENS WEST		LEEDS	
16	1701557223	ADAMS	YVONNE	19550117	F		5 BOUNDARY FARM ROAD		LEEDS	
17	2201644040	ADAMS	YVONNE	19660122	F	THE GATE LODGE	412 HARROGATE ROAD		LEEDS	
18	1104222205	ADAMS	YVONNE	19220411	F		5 BOUNDARY FARM ROAD		LEEDS	
19	0110251628	ADAMS	YVONNE	19251001	F	GATE LODGE	THE MOORINGS HARROGATE ROAD		LEEDS	
20	1601705493	ADAMSON	YUEN	19700116	M		26 ST HELENS CLOSE		LEEDS	
21	1905630670	AGAR	YOUSSEF	19630519	M		11 SAXON GROVE		LEEDS	
22	2405425157	AHMAD	YARAWAR	19420524	M		8 PRIMLEY PARK DRIVE		LEEDS	
23	2421395515	AHMAD	YAU	19391124	M	MILLSTONE THE MANOR HOUSE	LONG CAUSEWAY		LEEDS	

 **Note** - The above example is **Microsoft Excel**, how this looks depends on your spreadsheet application of choice, but the content is the same.

The data included for each patient is:

- **CHI Number** - Please be aware, the leading zero is removed due to spreadsheet formatting.
- **Surname**
- **Forename**
- **Date of Birth**
- **Sex**
- **House Name**
- **House Number and Road**
- **Locality**
- **Town**
- **County**
- **Post Code**
- **Registration Status**
- **Health Board Cipher**
- **Current GP**

3. Select **Close**  to close the file.

## Importing a Bulk Registration File

Please be aware:

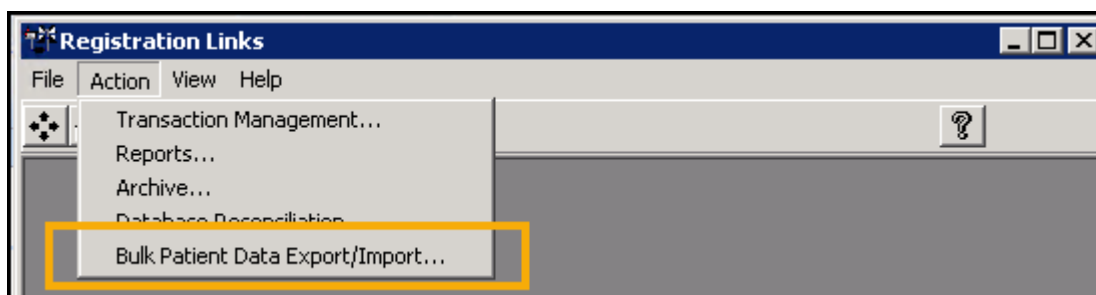
- Only patients with the following **Registration Status** are included in an import file:
  - **Permanent**
  - **Temporary Residents - Long stay** - Active only.
- The list of incoming patients must be reviewed as part of the import process.

To process a Bulk Registration Import file received from your Health Board:

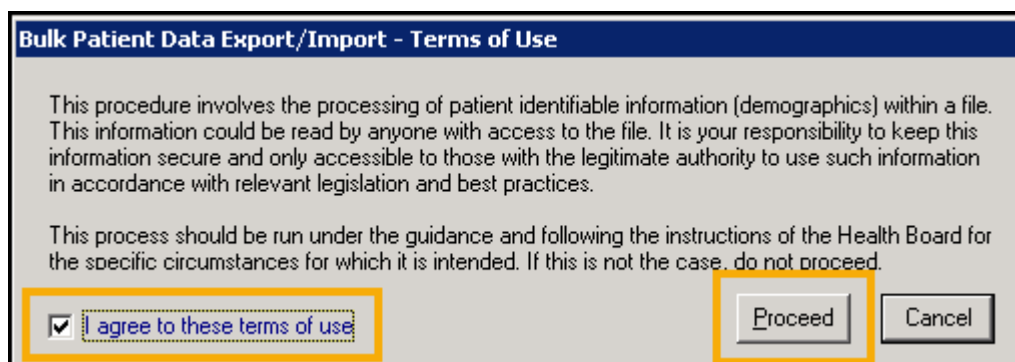
1. From your **Remote Desktop**, using **File Explorer** save the file received from your Health Board to **P:\Extracts\HB BULK IMPORT**.
2. From the **Vision 3** front screen, select **Messaging - Registration Links**



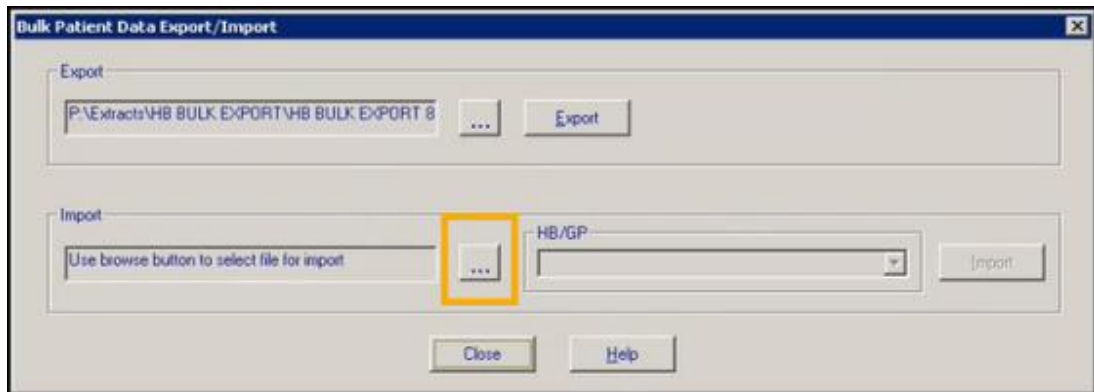
3. Select **Action - Bulk Patient Data Export/Import**:



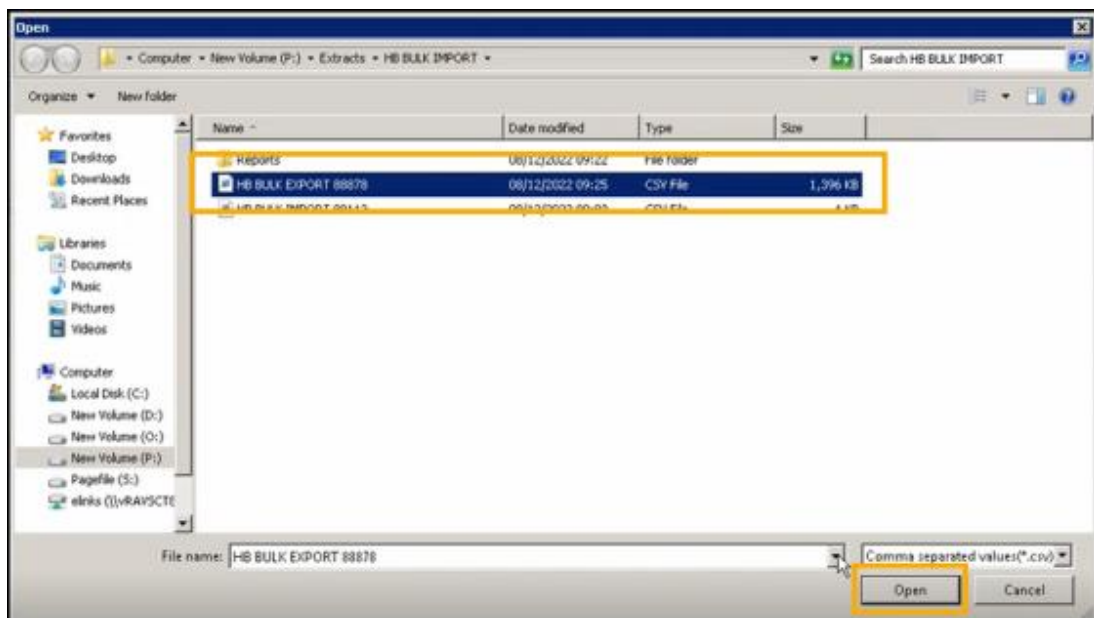
4. The **Bulk Patient Data Export/Import - Terms of Use** screen displays, read the message, tick **I agree to these terms of use** and then select **Proceed**:



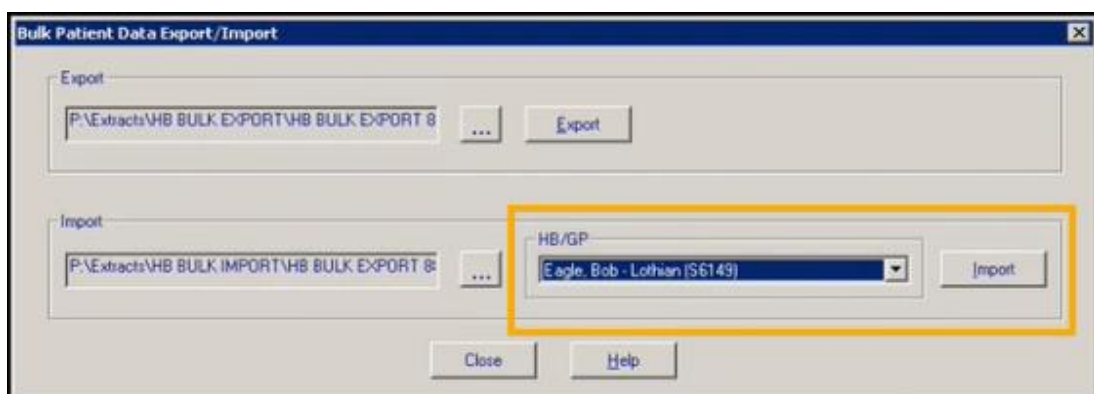
- The **Bulk Patient Data Export/Import** screen displays, in **Import** select **Browse** :



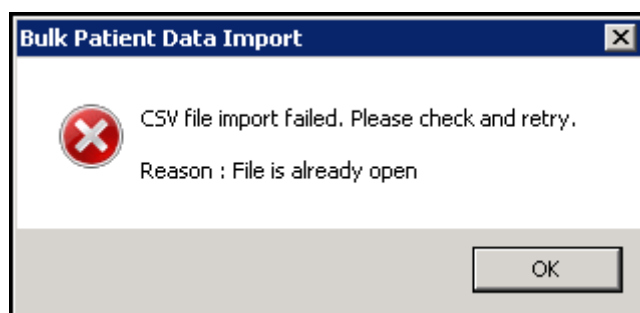
- The **Open** screen displays at **P:\Extracts\HB BULK IMPORT** by default, select the file required and select **Open**:



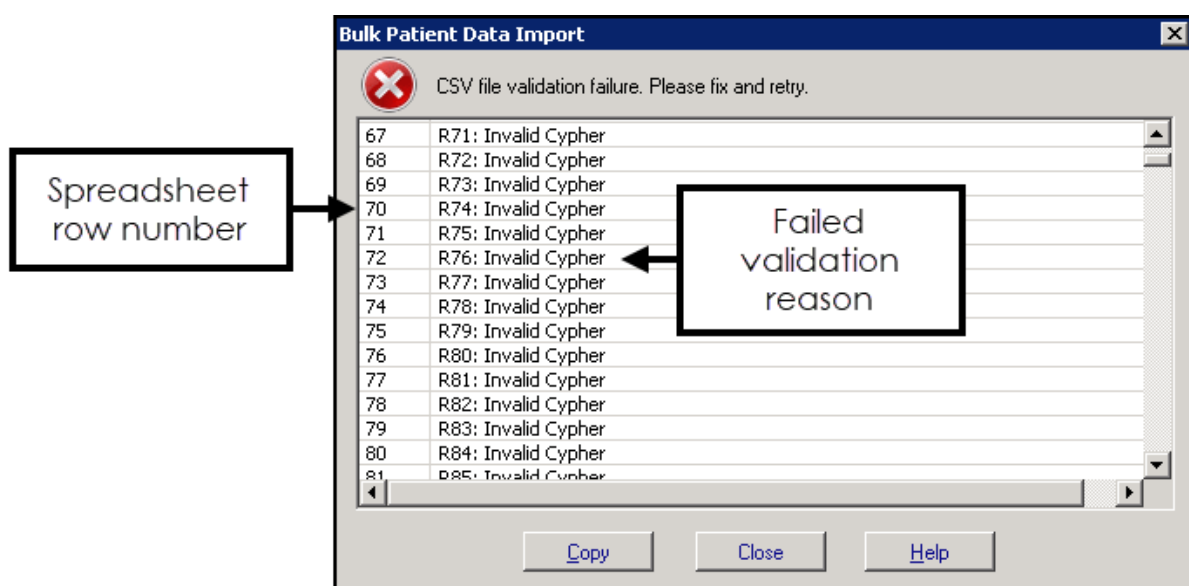
- You are returned to the **Bulk Patient Data Export/Import** screen, select the appropriate **HB/GP** combination, as advised by your Health Board, and then select **Import**:




If there is a problem with the import, the **Bulk Patient Data Import** error message displays detailing the issue, select **OK** to rectify the issue and try again:

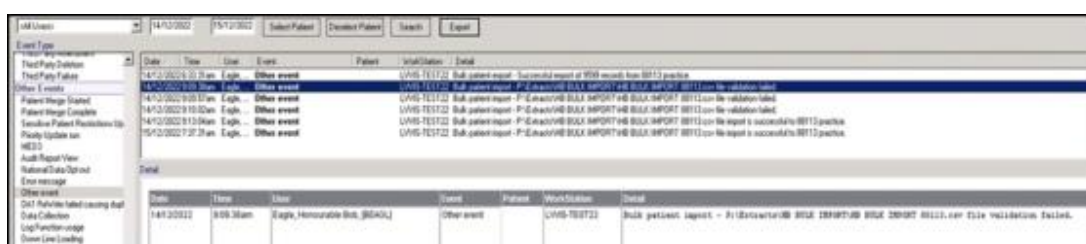


8. The validation process starts. The **Bulk Patient Data Import** screen displays, listing any issues with the import file. These must be addressed before you can successfully import it:



This list displays the spreadsheet row number and reason for validation failure to help you address issues.

 **Note** - An **Event Log** entry is made regarding a failed validation.





9. Select **Copy** to copy this information to your Windows Clipboard and then paste elsewhere ready to work through it, for example, you may want to paste the list to a blank page in your word processing package.
10. Outside of **Vision 3**, using **File Explorer**, navigate to the import file in **P:\Extracts\HB BULK IMPORT** and open it. Using the data copied in the step above, correct the information on the CSV file, for example:
  - **Invalid CHI\_Number** - Correct the CHI Number.
  - **Invalid Forename** - Correct the forename.

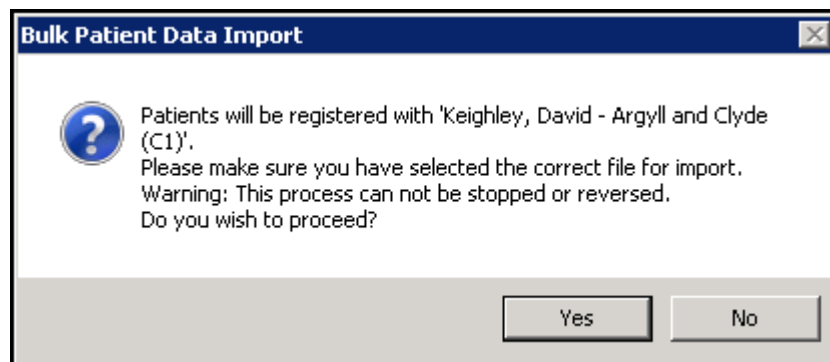


---

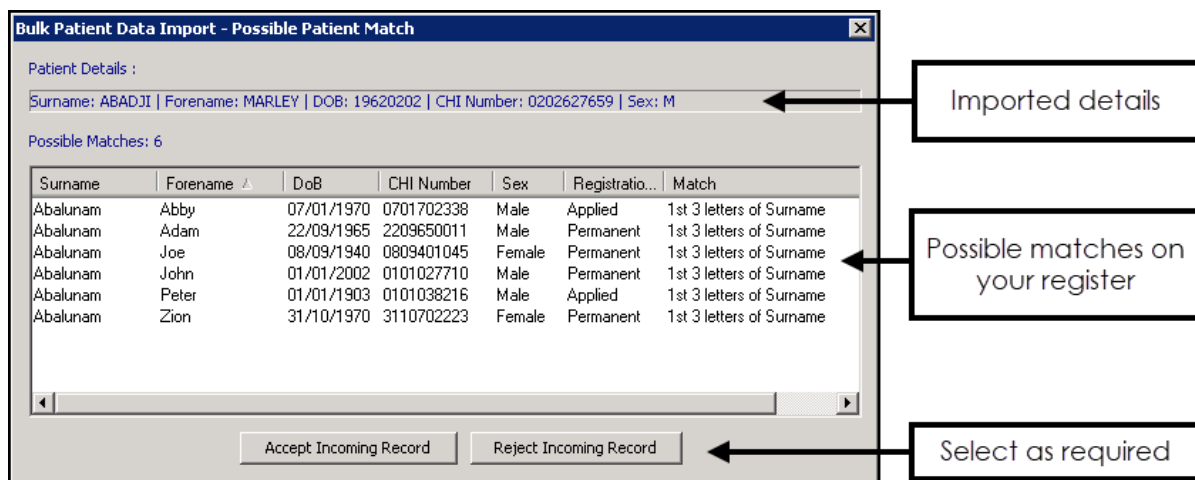
**Note** - Errors here relate to the data type and permitted length, you can either fix the problem or remove the row from the import file and process the affected record outside of the import process.

---


11. Once you have completed the list, repeat steps 2 - 7 again and this time the file should pass validation and the **Bulk Patient Data Import** message displays, select **Yes** to confirm your selections are correct:



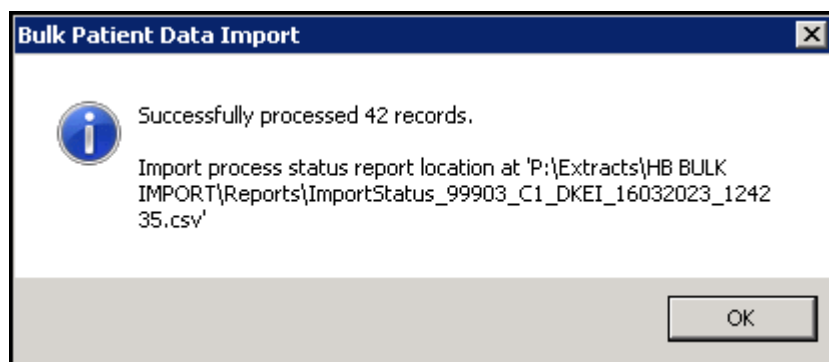
12. **Vision 3** processes the patients being imported one by one, comparing each patient to your existing patient register. Any patients included in the import that may already have a record at your practice trigger the **Bulk Patient Data Import - Possible Patient Match** screen:




Check your existing register for the appropriate response and then select from:

- **Accept Incoming Record** - To create a new patient record.
- **Reject Incoming Record** - To refuse to accept this patient and process the patient manually.
- **Close**  - To skip this patient record.

13. The process automatically continues. Once finished, the **Bulk Patient Data Import - Successfully processed nnnnn records** message displays, where *nnnnn* is the number of records processed, the following text details the location of the status report, it is important you make a note of this location. Select **OK** to close:



14. You must now check the Status report, from **File Explorer**, navigate to the path indicated by the **Bulk Patient Data Import - Successfully processed nnnnn records** message, the default is **P:\Extracts\HB BULK IMPORT\Reports**.
15. Double click on the report required to open it.

16. Each patient imported displays with their new status, check they are all correct. The status can be any one of the following:
- **Permanent patient CHI match - Auto rejected** - A patient with this CHI number is already on your register and so the system automatically rejects the addition.
  - **Manually accepted - New patient record created** - This is a record that you have accepted as part of the process in step 12 above.
  - **Manually rejected** - This is a record that you have refused as part of the process in step 12 above.
  - **System rejected - Existing record not previously exported.**
  - **Dialog closed by user. Patient skipped** - Close  selected on **Possible Patient Match** screen.
  - **No existing patient - New patient record created.**

17. Select **Close**  to close the report.

The new and re-registered patients are now available from **Consultation Manager** and are processed through **Registration Links** in the usual way, see the [Registration Links Help Centre](#) for full details.

## Using LibreOffice in Vision 3 - Scotland only

**LibreOffice** is a free office suite that can be used for all your word processing tasks. **Vision 3** is now ready to use **LibreOffice** for all your Practice, Patient, Recall and Referral template letters.

To download **LibreOffice** to your system, see <https://www.libreoffice.org>.



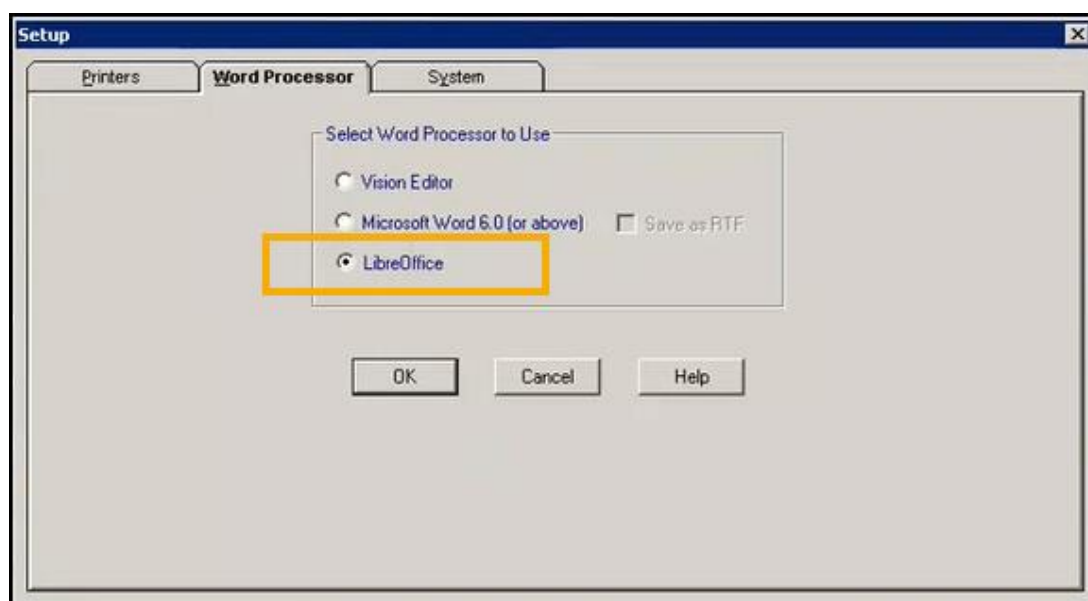
**Important** - Due to possible file conflicts, you should avoid installing both **Microsoft Word** and **LibreOffice** on the same computer.

To switch to **LibreOffice**:

### Switching your Word Processor to LibreOffice

To switch your default word processor to **LibreOffice**:


1. From the **Vision 3 Front Screen**, select **Options - Setup**.
2. The **Setup** screen displays, from the **Word Processor** tab select **LibreOffice**:

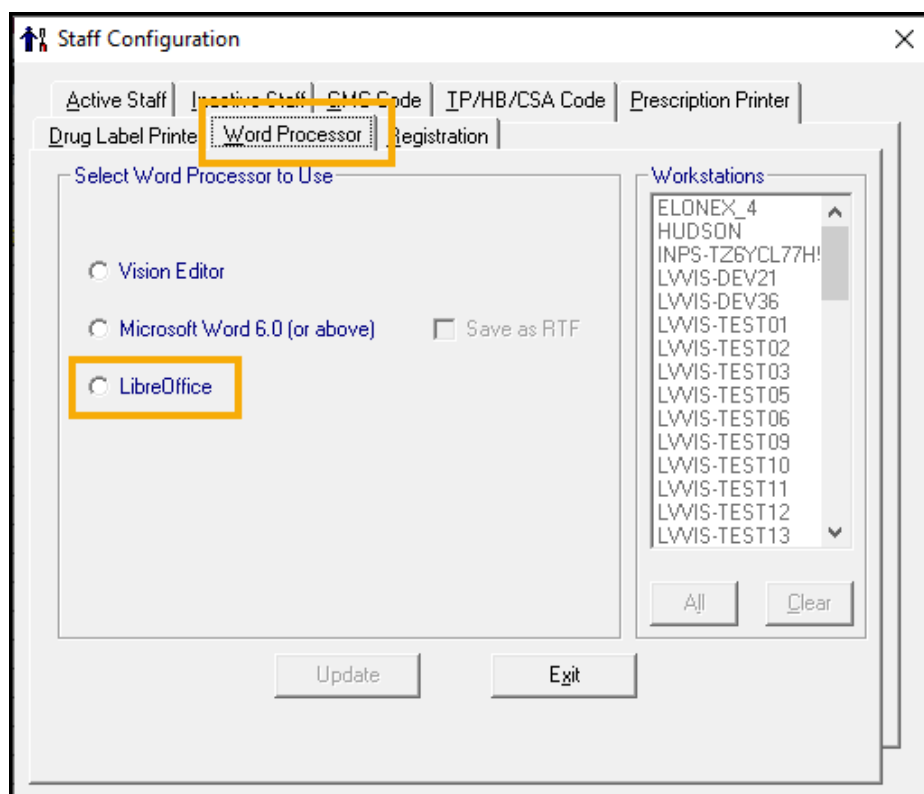


3. Select **OK** to save.

## Switching Multiple Workstations to using LibreOffice

To switch multiple workstations over to using **LibreOffice** as their default word processor:

1. From the **Vision 3 Front Screen**, select **Management Tools - Control Panel** - **File Maintenance** and then **Config** .
2. The **Staff Configuration** screen displays, select the **Word Processor** tab:



3. Select **LibreOffice**.
4. Select **Update** to save for all members of staff.



See [Creating a Vision 3 Templates in LibreOffice](#) on page 30 for details.



**Note** - The Patient Facing Services Registration Letter updates to **LibreOffice** once you select **LibreOffice** as your word processor of choice.



**Training Tip** - Any Microsoft Word templates that you want to continue to use, must be recreated in **LibreOffice**, there is no conversion process. Use this process to review, update or delete templates where appropriate.

## Creating Vision 3 Templates in LibreOffice

---



**Training Tip** - Any Microsoft Word templates that you want to continue to use, must be recreated in **LibreOffice**, there is no conversion process. Use this process to review, update or delete templates where appropriate.

---

To create a template:

1. From the **Vision 3 Front Screen**, select **Utilities - Word Processor**.
2. The **Vision Word Processor screen** displays, select the type of template you are creating:
  - **Practice** - No patient merge options are available.
  - **Patient** - In addition to the **Practice** information, basic demographic and clinical data merge options are available.
  - **Recall** - In addition to the **Patient** information, recall data merge options are available.
  - **Referral** - In addition to the **Patient** information, referral data merge options are available.

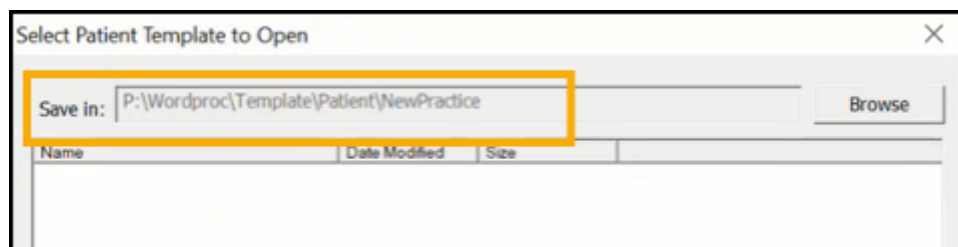


See [Merge Fields](#) in the **Utilities Help Centre** for full details of the merge options available.

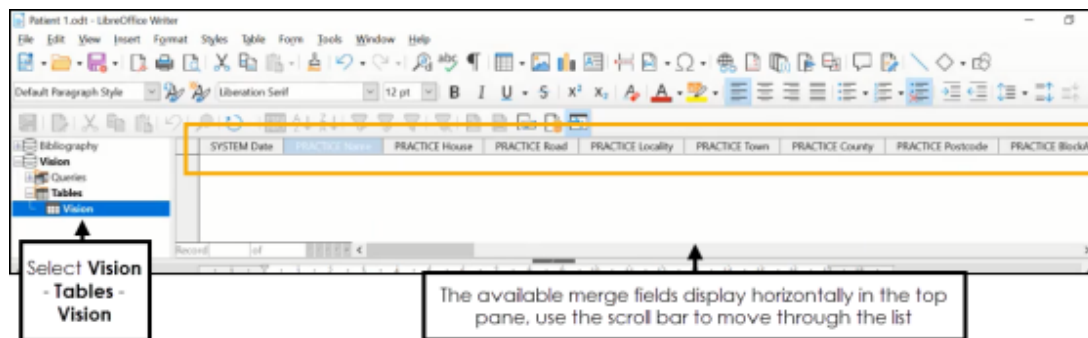
---

3. Select **Create Template**.

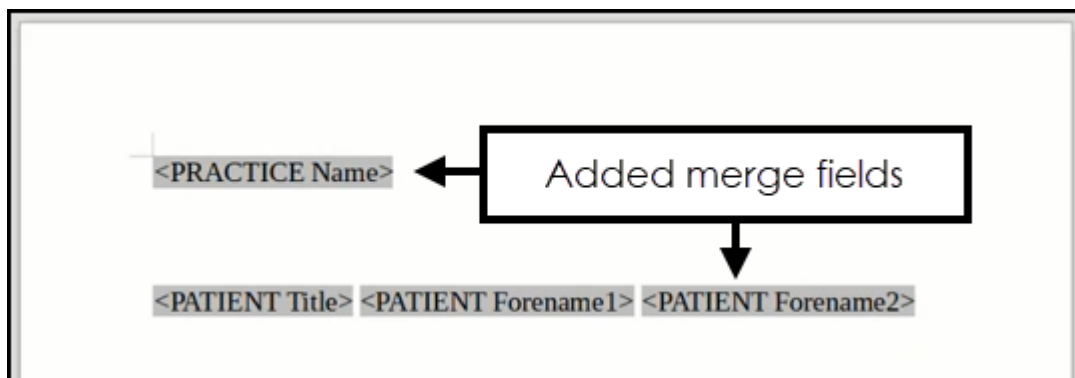
4. The **Select Patient Template to Open** screen displays, in **File name** enter a name for your template. You can either:
  - Save your template to the default folder:
    - **Patient** folder for patient templates.
    - **Referral** folder for referral templates.
    - **Recall** folder for Recall templates.
    - **Referral** folder for Referral templates, or
  - Select **Browse** and either:
    - Navigate to where you want to save this template, or
    - Select **Make New Folder** to create a new folder. Enter a name for your new folder in **Folder** and select **OK**. Your new folder displays in **Save in:**




5. Select **Create** and **LibreOffice** opens with a blank document.
6. From the side pane, select **Vision - Tables - Vision** and the merge fields display horizontally across the top pane:



7. Create your template letter as required selecting the appropriate merge fields where appropriate, merge fields display in the letter with <> around them, you can move them around or copy them to other areas of the document as required:



You can use all of the familiar word processing features in **LibreOffice** to make the layout of the template more attractive.

8. Select **Close**  and the template and automatically saves with the name allocated, in the directory selected.

You use **LibreOffice** templates in the same way as you used **Microsoft Word** templates, see [Generating a Recall Letter](#), [Generate a Referral/Request Letter](#) or [Adding Correspondence](#) in the **Consultation Manager Help Centre** for details.