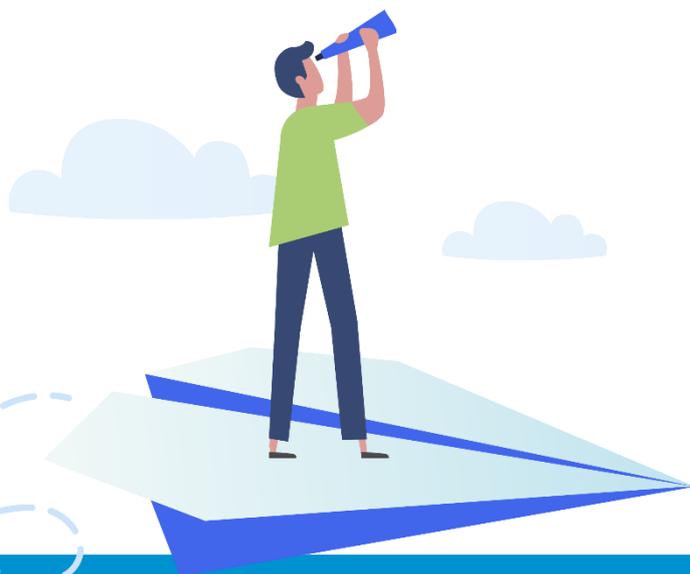




Using the Cegedim Healthcare Solutions Formulary Management Tool in Vision 3

Version 1.1
29 May 2024



Copyright © 2024 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

Cegedim Healthcare Solutions Formulary Management Tool	4
Subscribing to a Formulary	5
Activating Cegedim Healthcare Solutions FMT	6
Managing FMT Access	11
Prescribing with Cegedim Healthcare Solutions FMT	13
Running a Manual FMT Update	18

Cegedim Healthcare Solutions Formulary Management Tool

A drugs formulary is a curated list of items that help 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 automatically synchronised overnight 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

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 11.

 See the [Cegedim Healthcare Solutions FMT Help Centre](#) for details of creating and maintaining your own formularies.

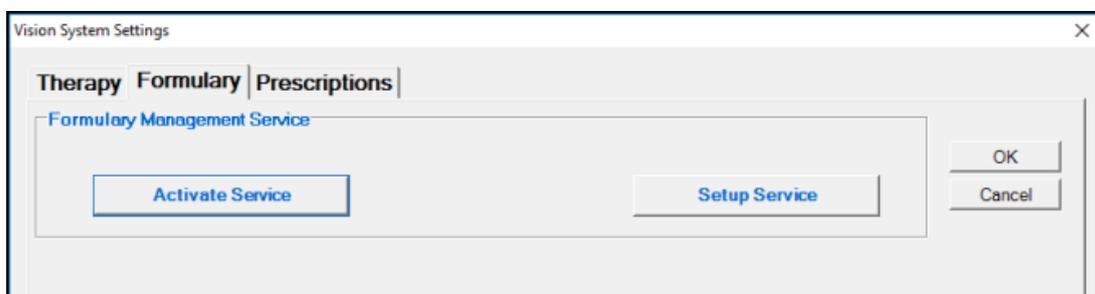
Activating Cegedim Healthcare Solutions FMT

Once you have subscribed to the formularies required within **Cegedim Healthcare Solutions FMT**, see [Subscribing to a Formulary](#) on page 5 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**.

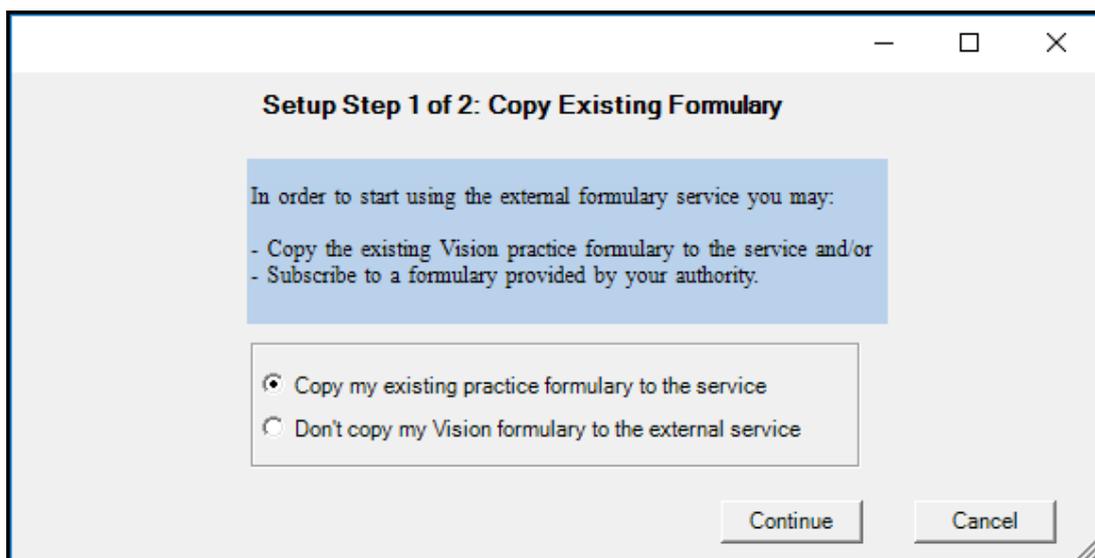
To set up and activate the **Cegedim Healthcare Solutions FMT**:

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

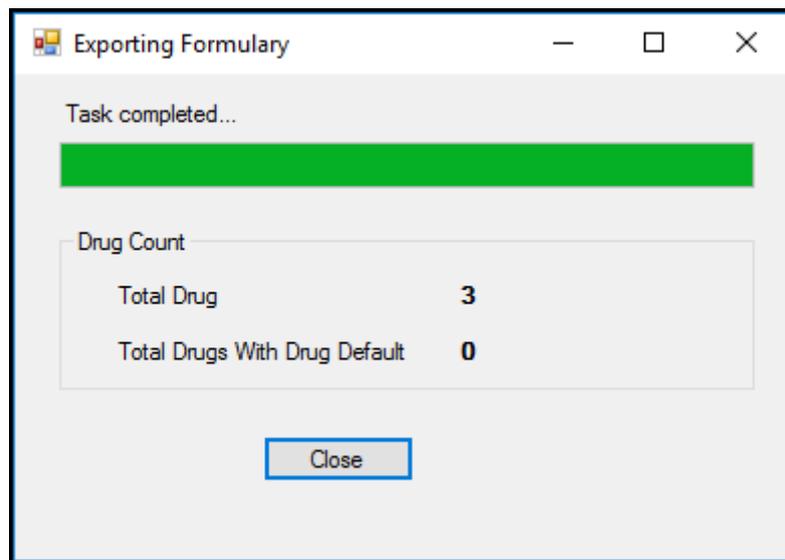


 **Note** - You should set up your **FMT** options before selecting **Activate**.

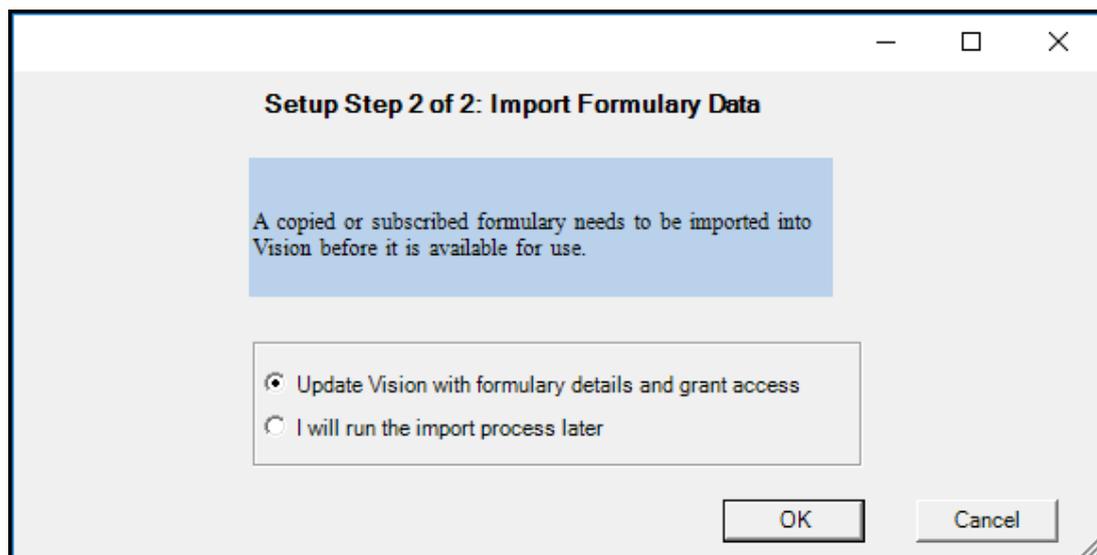
2. Select **Setup Service** and **Setup Step 1 of 2** displays:



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** displays, 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:

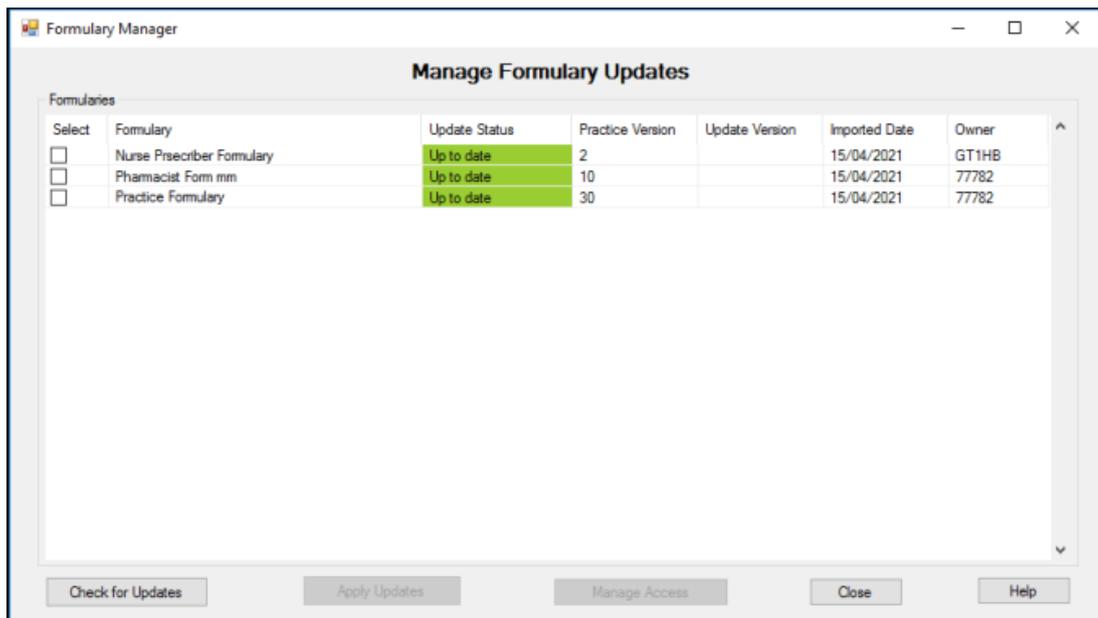
- **Update Vision with formulary details and grant access** - Select to import available formularies to your **Vision 3** system for use, or
- **I will run the import process later** - Select to defer the import.



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 **Formulary Manager** screen displays.

9. The **Formulary Manager** 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 screenshot shows the 'Formulary Manager' window with the title 'Manage Formulary Updates'. It contains a table with the following data:

Select	Formulary	Update Status	Practice Version	Update Version	Imported Date	Owner
<input type="checkbox"/>	Nurse Prescriber Formulary	Up to date	2		15/04/2021	GT1HB
<input type="checkbox"/>	Pharmacist Form mm	Up to date	10		15/04/2021	77782
<input type="checkbox"/>	Practice Formulary	Up to date	30		15/04/2021	77782

At the bottom of the window, there are five buttons: 'Check for Updates', 'Apply Updates', 'Manage Access', 'Close', and 'Help'.

The following formulary options are available:

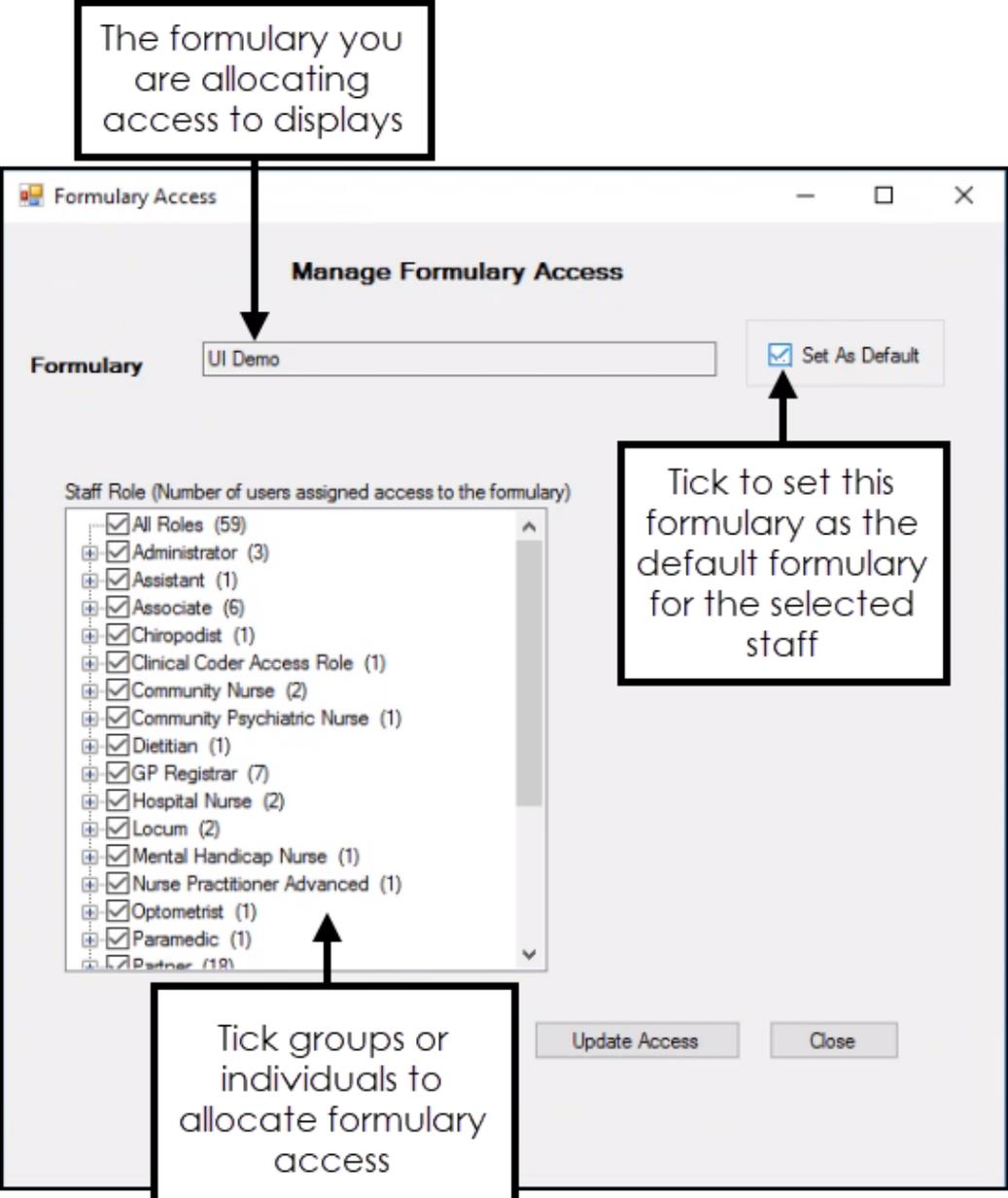
- **Check for updates** - Select to check for any updates. If there are any updates, the **Update Status** displays **Update available** in yellow.



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 18 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

Formulary: UI Demo Set As Default

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

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**.

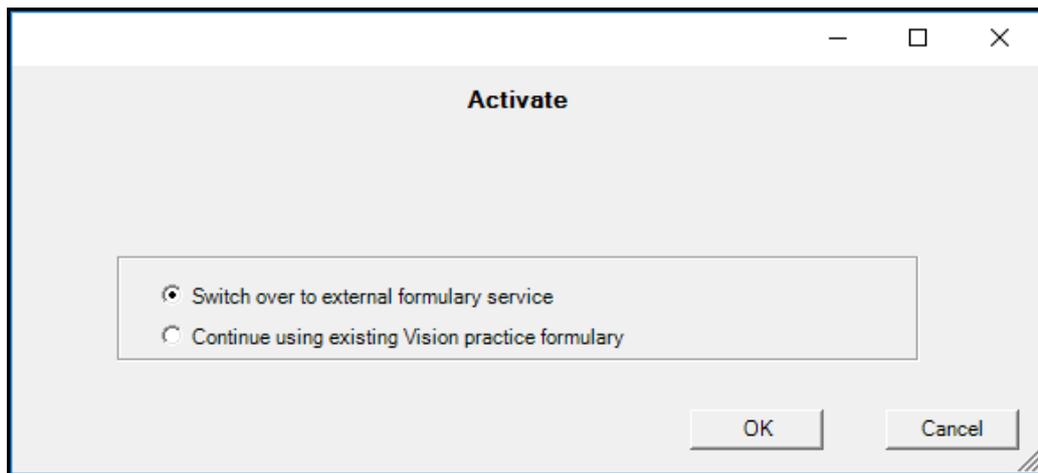
- **Help** - Opens the relevant help topic in the [Managing FMT Updates](#) in the **Management Tools Help Centre**.

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.

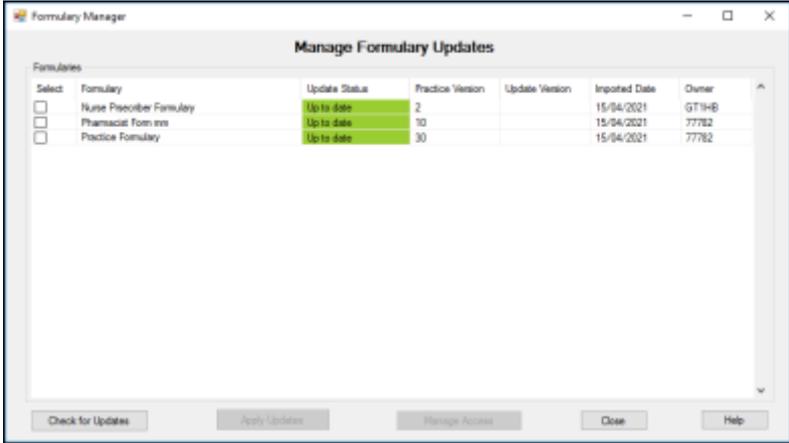
Managing FMT Access

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**



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

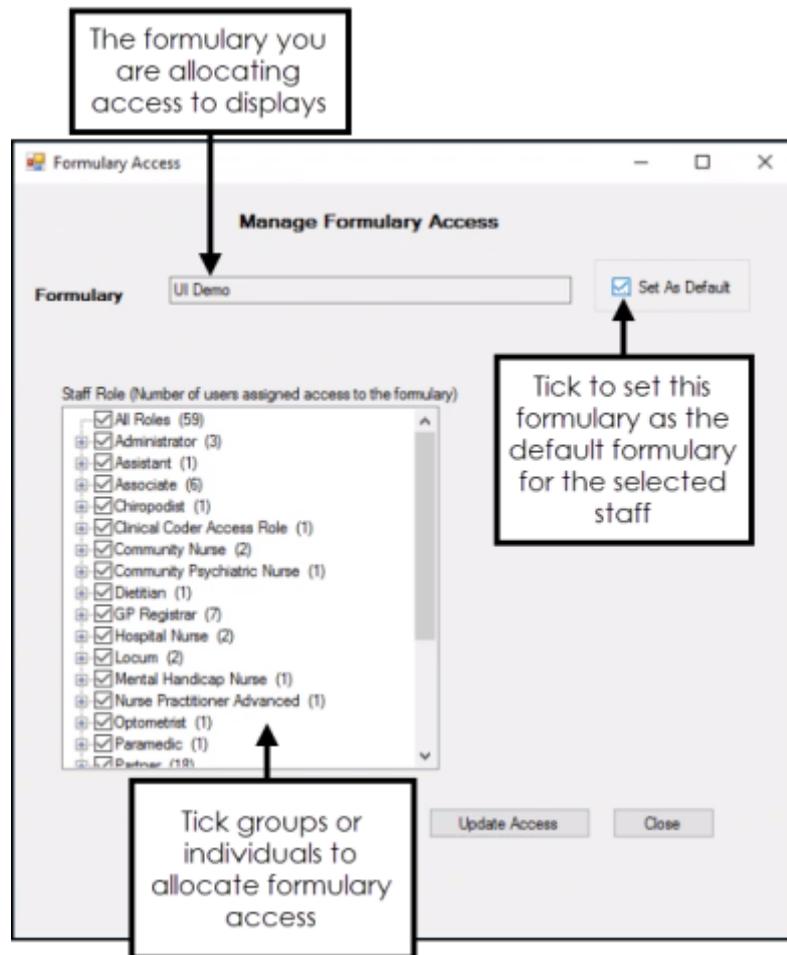


Select	Formulary	Update Status	Practice Version	Update Version	Imported Date	Owner
<input type="checkbox"/>	Nurse Prescriber Formulary	Up to date	2		15/04/2021	GT146
<input type="checkbox"/>	Pharmacist Form m	Up to date	10		15/04/2021	77782
<input type="checkbox"/>	Practice Formulary	Up to date	30		15/04/2021	77782

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.

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



4. 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.
5. Select **Set As Default** to set the selected formulary as the first one offered.
6. 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.



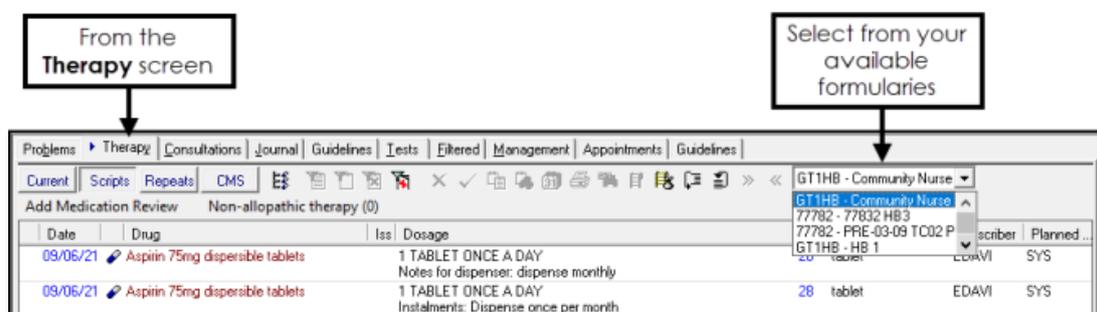
Remember - You can still prescribe away from the formulary if appropriate.

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)**.

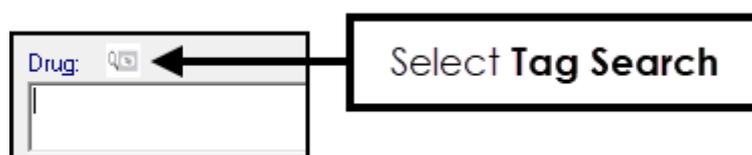
To use **Cegedim Healthcare Solutions FMT** from the **Therapy - Add** screens:

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](#) 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.

→ See [Selecting an Item using Cegedim Healthcare Solutions FMT Tags](#) on page 15 for details.

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:



→ See [Selecting an Item using Cegedim Healthcare Solutions FMT Tags](#) on page 15 for details.

5. Select the appropriate **Dosage** if more than one is available for this item.
6. Complete the **Therapy - Add** screen in the usual way.

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**.

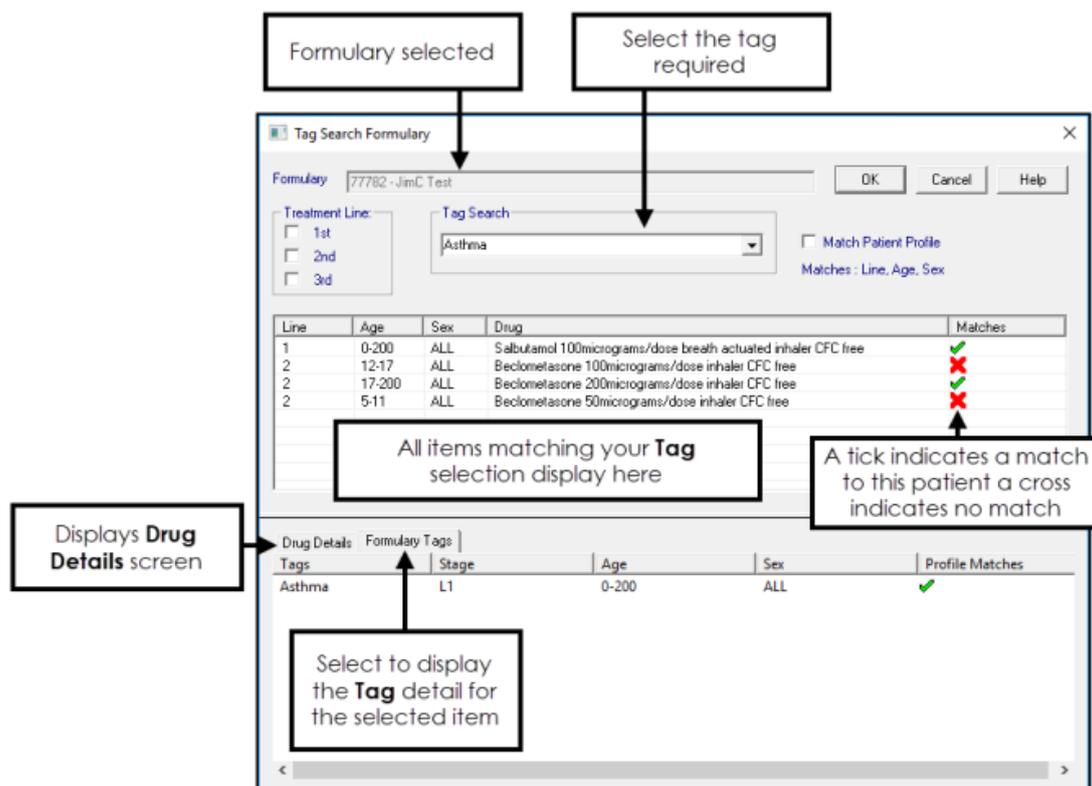
Items in a formulary can be allocated **Tags**, designed to enable condition and treatment groups within a formulary, for example, a **Tag** of UTI can be added to all treatments for urinary tract infections in your formulary.

To select an item by **Tag**:

1. From the **Therapy - Add** screen, select **Tag Search**:



2. The **Tag Search Formulary** screen displays:



The screenshot shows the 'Tag Search Formulary' window with the following callouts:

- Formulary selected**: Points to the 'Formulary' field containing '77782 - JimC Test'.
- Select the tag required**: Points to the 'Tag Search' dropdown menu containing 'Asthma'.
- Match Patient Profile**: A checkbox option with the text 'Matches : Line, Age, Sex' below it.
- All items matching your Tag selection display here**: Points to a table listing search results.
- A tick indicates a match to this patient a cross indicates no match**: Points to the 'Matches' column in the table.
- Displays Drug Details screen**: Points to the 'Drug Details' tab at the bottom.
- Select to display the Tag detail for the selected item**: Points to the 'Formulary Tags' sub-tab.

Line	Age	Sex	Drug	Matches
1	0-200	ALL	Salbutamol 100micrograms/dose breath actuated inhaler CFC free	✗
2	12-17	ALL	Beclometasone 100micrograms/dose inhaler CFC free	✗
2	17-200	ALL	Beclometasone 200micrograms/dose inhaler CFC free	✗
2	5-11	ALL	Beclometasone 50micrograms/dose inhaler CFC free	✓

Tags	Stage	Age	Sex	Profile Matches
Asthma	L1	0-200	ALL	✓

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 13 for details.

Running a Manual FMT Update

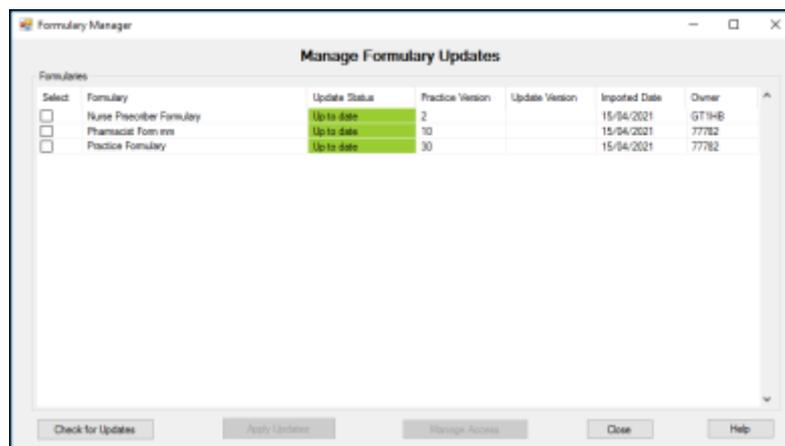
Cegedim Healthcare Solutions FMT updates are automatically processed overnight. However, if there is an urgent update that you need to process before the overnight synchronisation, you can run a manual update.

To run a manual update:

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



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



3. The **Manage Formulary** screen displays all the formularies available to you, Select **Check for updates**.
4. If there are any updates, the **Update Status** displays **Update Available** in yellow. Tick the line(s) to update and select **Apply Updates**.
5. Select **Close**.



See the [Cegedim Healthcare Solutions FMT Help Centre](#) for details of creating and maintaining your own formularies.