

Patient
Services

Migrating your Patients to Patient Services

(Scotland)

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Migrating your Patients to Patient Services

The following details the procedure for migrating your patients from **EMIS Patient Access** to **Cegedim Healthcare Solutions Patient Services**.

It is important that before your migration to **Cegedim Primary Care Hosted Solution**:

- You run a data quality check on the email addresses and mobile phone numbers included in your patient records to ensure the current details are accurate.
- Once the data quality check is complete, you must ensure that all of your **Patient Access** registered patients have Read code **9IW..00 Registered for access to Patient Facing Service** added to their record. This records that the patient's identification has been checked and verified.
- An email is sent to your **Patient Access** patients notifying them of the migration to the **Patient Services** website detailing the steps they need to take.
- Immediately following migration, any patient with Read code **9IW..00 Registered for access to Patient Facing Service** recorded automatically receives a registration email, to their verified email address, containing full details and instructions on creating their new **Patient Services** account. See **Patient Email** on page **28** for details of the email.

After your migration, the following **Patient Services** functionality is automatically enabled and must be configured as soon as possible:

- **Online Appointments**, see **Configuring Online Appointments** on page **5** for details.
- **Online Repeat Prescriptions**, see **Configuring Online Prescriptions** on page **22** for details.


Full patient online services help for your practice is available from:

- http://help.visionhealth.co.uk/Patient_Online_Services_Help_Centre/Content/Home.htm

Full help for your patients is available from:

- http://help.visionhealth.co.uk/Patient_Services_-_Patient_Help_Centre/Content/Home.htm

Configuring Online Appointments

 **Note** - You must have System Administrator rights to enable and configure patient online services.

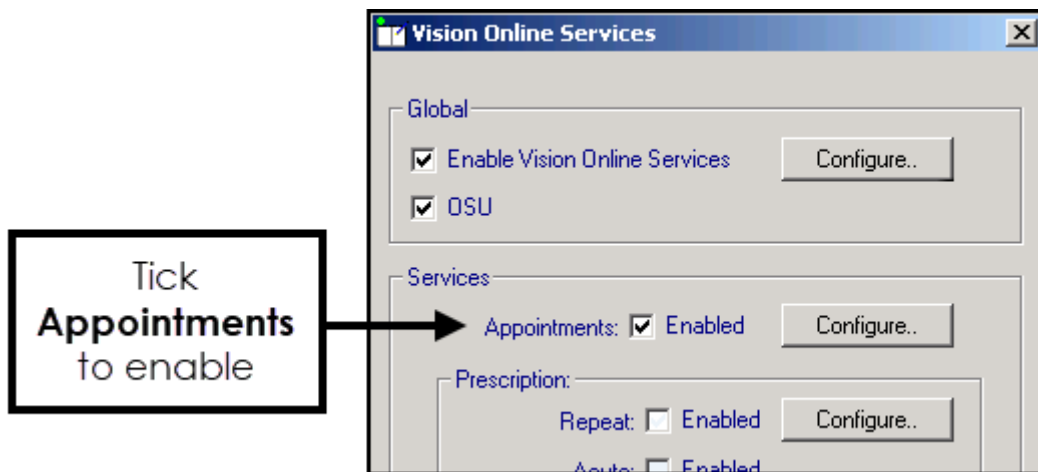
To enable online appointments:

1. From **Vision 3 - Management Tools** select **Control Panel – File**

Maintenance - Online

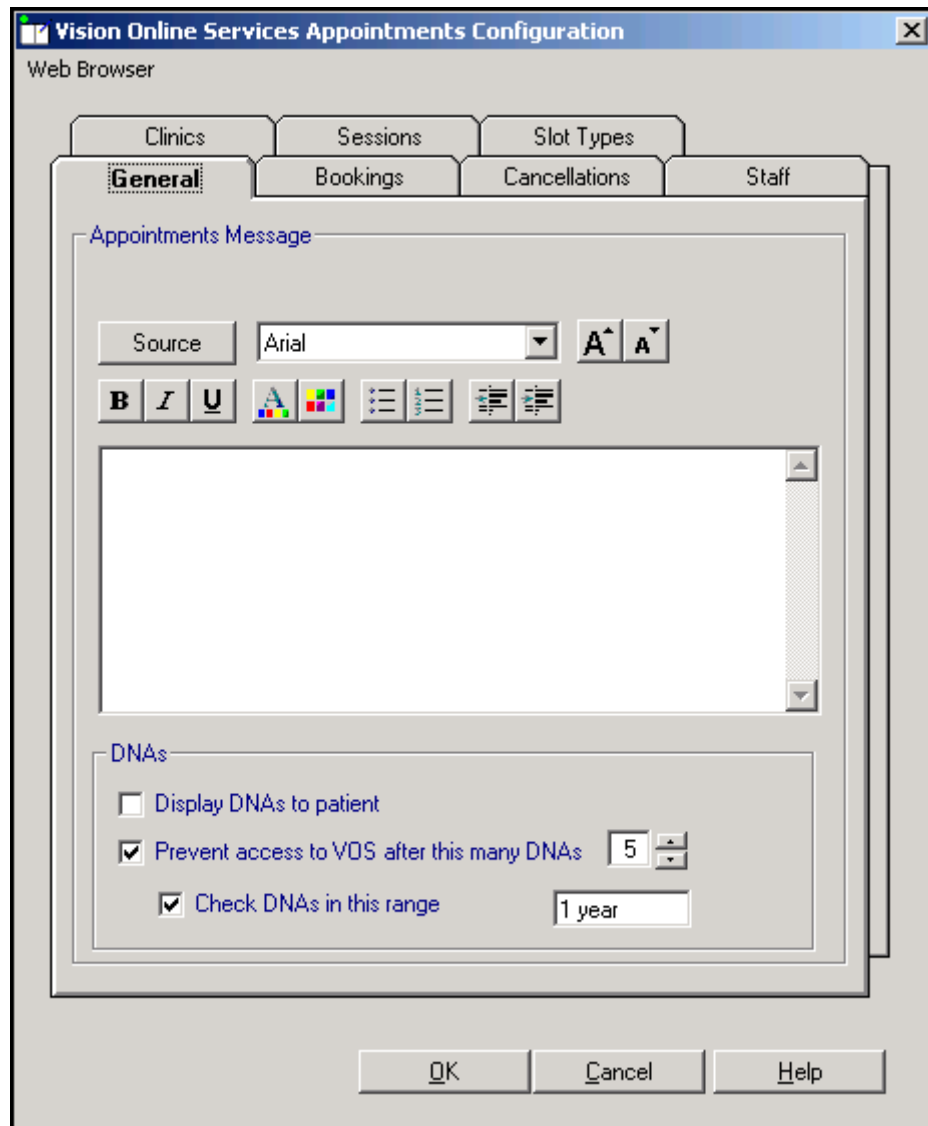


2. The **Vision Online Services** screen displays, tick **Appointments** to enable online appointments:



3. Now select **Configure** to customise how appointments works for your practice.

You need to determine which staff and sessions you want to be available from the **Patient Services** website and set up how you want online appointments to work for you. There are seven tabs that should be considered:



General Tab

The **General** tab enables you to setup the following:

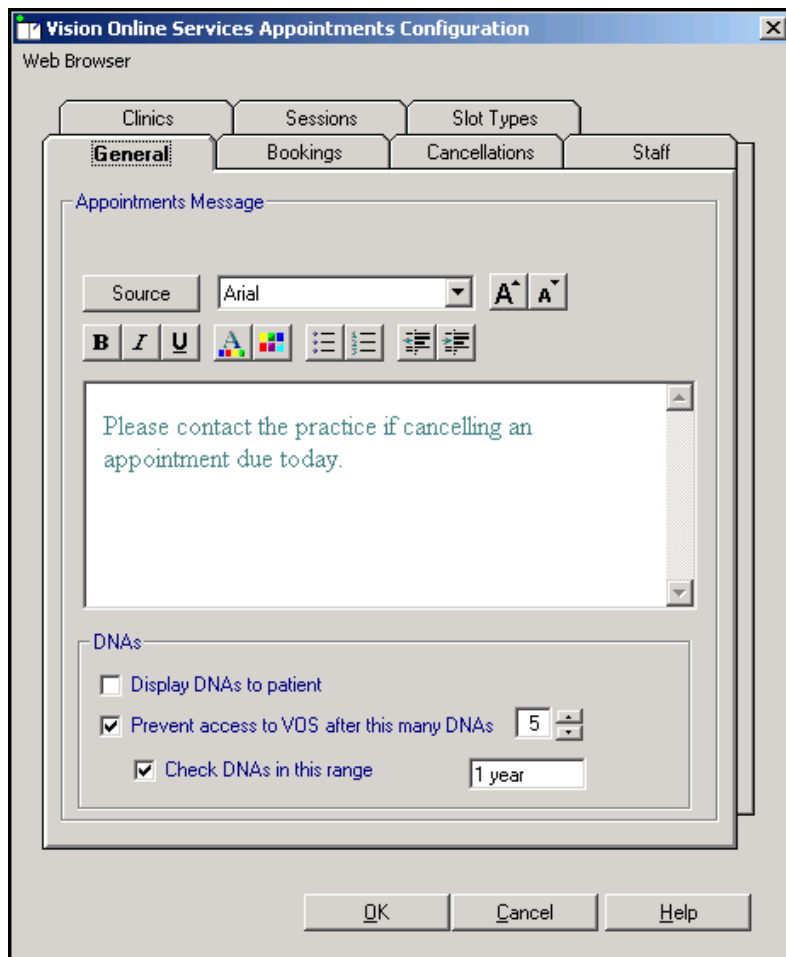
- **Appointments Message**, see [Add Appointment Message](#) on page 7.
- **Did Not Attend (DNA)**, see [Did Not Attends \(DNAs\)](#) on page 8.

Add Appointment Message

The **Appointments Message** is a practice specific message that displays on the **Appointments** page of the website. You could consider using the content of the message to direct patients in how to use the service and who to contact should they have an issue.

To add an **Appointment Message**:

1. From **Online Services Appointments Configuration** select the **General** tab.
2. Type your message in the **Appointments Message** window using the formatting editor provided. If you prefer, you can customise your message source using HTML formatting tags, see [Formatting HTML Messages](#) on page 27 for details:



The screenshot shows the 'Vision Online Services Appointments Configuration' window. The 'General' tab is selected. The 'Appointments Message' section contains a text area with the message: 'Please contact the practice if cancelling an appointment due today.' Below this is the 'DNAs' section with the following options:

- Display DNAs to patient
- Prevent access to VDS after this many DNAs: 5
- Check DNAs in this range: 1 year

Buttons for 'OK', 'Cancel', and 'Help' are visible at the bottom.

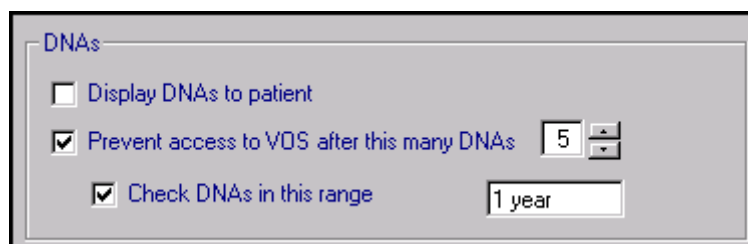
3. Select **OK** to save.

Note - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Appointment Message**: 'In the case of a query regarding booking or cancelling an appointment please contact the surgery in the usual way'.

Did Not Attend (DNAs)

You can manage DNAs within online appointments, from **Online Services Appointments Configuration**, select **General - DNAs** and then select from:

- **Display DNAs to patient** - Tick to enable patients to view their DNA appointments.
- **Prevent access to Online Services after this many DNAs** - Tick to limit patients' access after a set amount of DNAs (removing the tick disables this function) and select a number of DNAs permitted before the user account is disabled.
- **Check DNAs in this range** - Tick to specify a date range for the DNA's if required and set a date:



DNAs

Display DNAs to patient

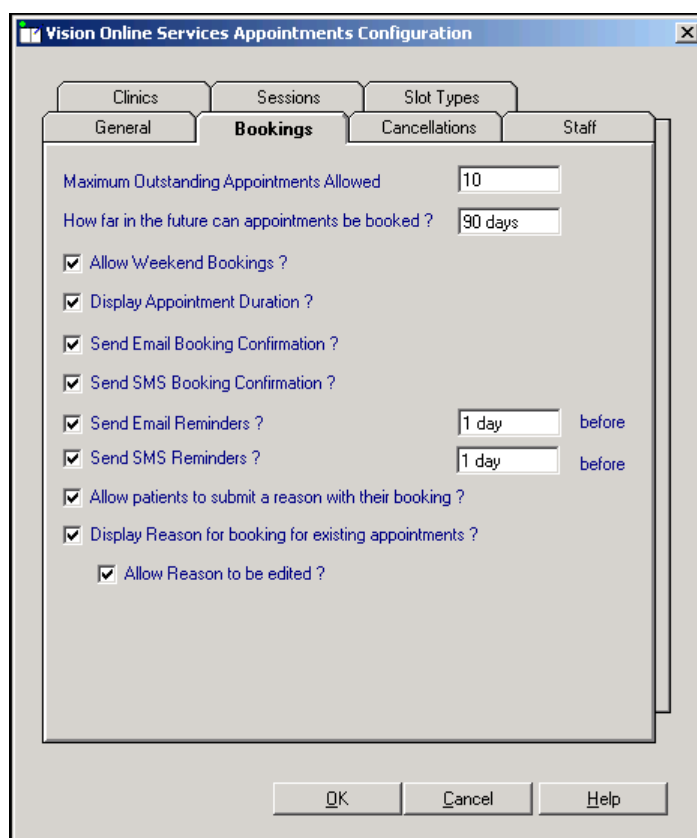
Prevent access to VOS after this many DNAs 5

Check DNAs in this range 1 year

Should a patient exceed the number of DNA's you have set here, the next time they log into their Patient Online Services account, there are no links to **Appointments**.

Bookings Tab

The **Bookings** tab allows you to configure existing and new online appointment bookings:



Vision Online Services Appointments Configuration

Clinics Sessions Slot Types

General **Bookings** Cancellations Staff

Maximum Outstanding Appointments Allowed: 10

How far in the future can appointments be booked?: 90 days

Allow Weekend Bookings ?

Display Appointment Duration ?

Send Email Booking Confirmation ?

Send SMS Booking Confirmation ?

Send Email Reminders ? 1 day before

Send SMS Reminders ? 1 day before

Allow patients to submit a reason with their booking ?

Display Reason for booking for existing appointments ?

Allow Reason to be edited ?

OK Cancel Help

Complete as required:

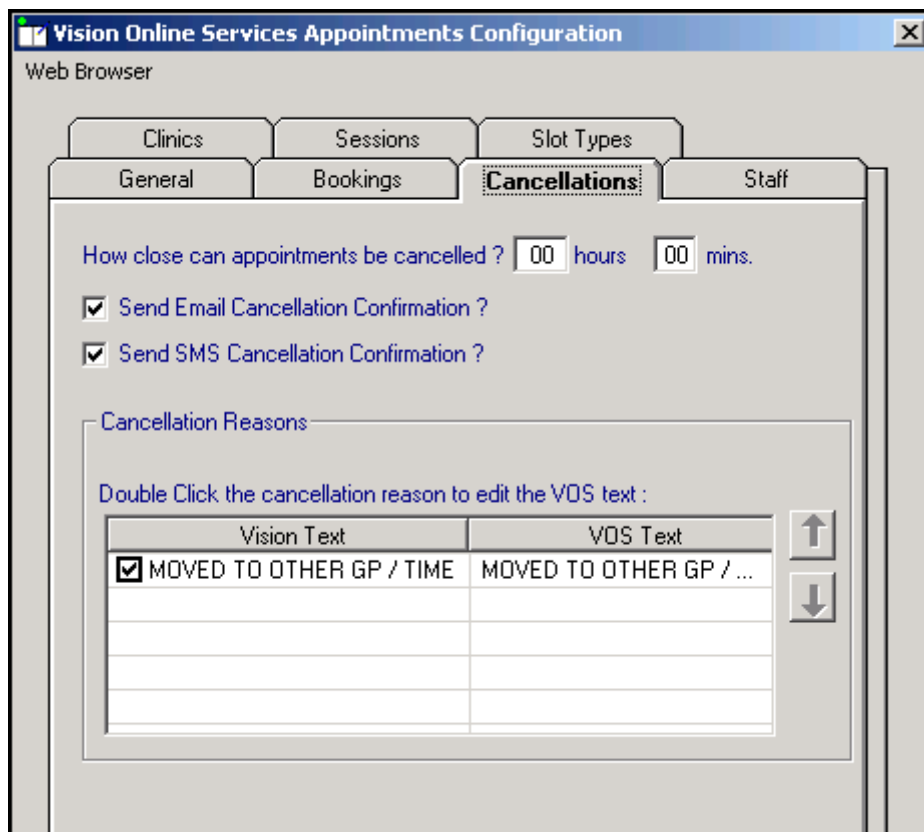
- **Maximum Outstanding Appointments Allowed** - You need to decide how many outstanding appointments a patient can have booked at any one time. Enter the number of appointments you want to allow. The default is 0 which enables your patients to book unlimited appointments. If the patient reaches the limit (by either online or practice booked appointments), the patient receives a message which states: *'You have reached the maximum number of bookings allowed. No further bookings can be made at this time.'*
- **How far in the future can appointments be booked** - You need to decide how far in advance your patients can book an online appointment. Enter the number required, followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years).
- **Allow Weekend Bookings** - If you provide weekend appointments, tick to enable weekends to be available online.
- **Display Appointment Duration** - Tick to display the duration of the appointment being booked to the patient.
- **Send Email Booking Confirmation** - Tick to email active online registered patients confirmation of their appointments booked online or in the practice.

- **Send SMS Booking Confirmation** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.
- **Send Email Reminders** - Tick and then specify how long before due time the patient is to be reminded.
- **Send SMS Reminders** - SMS Messaging is no longer a free option via NHS.net, therefore the option is disabled.
- **Allow patients to submit a reason with their booking?** - Tick to allow your patient to add a comment when booking appointments.
- **Display Reason for booking for existing appointments?** - Tick to enable your patients to view the booking reasons for existing appointments booked at the practice.
 - **Allow Reason to be edited?** - Tick to allow patients to edit the reason for booking.

Cancellations Tab

From the **Cancellations** tab you can:

- Set a time period for cancelling appointments.
- Determine if email confirmation messages are sent.
- Set cancellation reasons, see **Cancellation Reasons** on page 12 for details:



The screenshot shows the 'Cancellations' configuration window. It includes a 'Web Browser' header and tabs for 'Clinics', 'Sessions', 'Slot Types', 'General', 'Bookings', 'Cancellations', and 'Staff'. The 'Cancellations' tab is active. The configuration includes:

- A field for 'How close can appointments be cancelled?' with input boxes for '00' hours and '00' mins.
- Two checked checkboxes: 'Send Email Cancellation Confirmation?' and 'Send SMS Cancellation Confirmation?'.
- A section titled 'Cancellation Reasons' with a table and a 'Double Click the cancellation reason to edit the VDS text:' instruction.

Vision Text	VDS Text
<input checked="" type="checkbox"/> MOVED TO OTHER GP / TIME	MOVED TO OTHER GP / ...

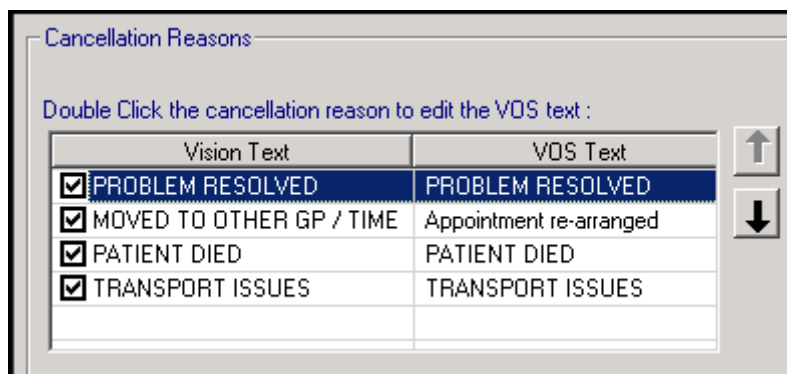
Complete as required:

- **How close can appointments be cancelled?** To set the cancellation time frame, enter a number of hours and minutes as required. If your patient attempts to cancel an appointment during the cancellation cut-off period they are advised '*This appointment cannot be cancelled online. Please contact your GP Practice*'. To enable Cancellation Confirmation, if you want the patient to receive email confirmation when an appointment is cancelled:
 - **Send Email Cancellation Confirmation** - Tick to send an email if an appointment is cancelled either at the practice or online.
 - **SMS Cancellation Confirmation** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.

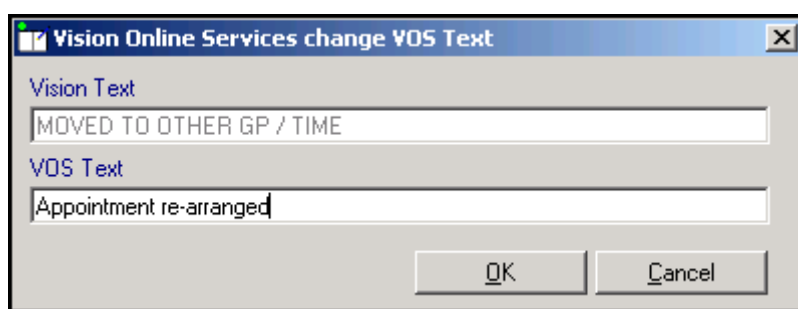
Cancellation Reasons

To manage the Cancellation Reasons:

1. From **Vision Online Services Appointments Configuration** select the **Cancellations** tab:



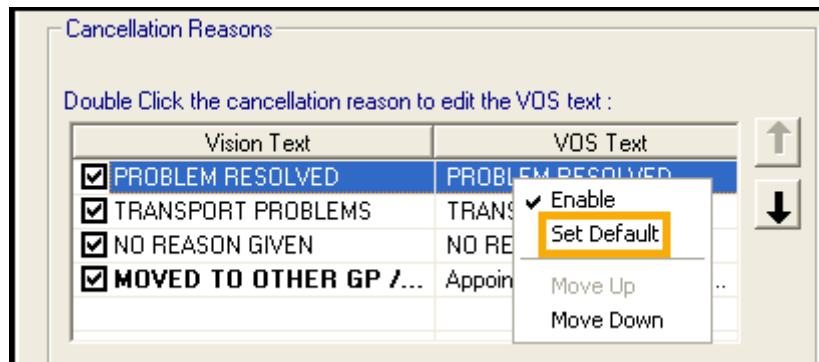
2. Double click the cancellation reason to edit and the **Vision Online Services change VOS Text** screen displays:



3. Enter the text you require and select **OK**.
4. Change the order the cancellation reasons display in by using the up and down arrows. Highlight the reason you wish to move and use the arrows to move it to the required position in the list. To hide a cancellation reason from your patients, remove the tick that proceeds it.

i Important - If all cancellation reasons are deselected (hidden) patients are unable to cancel appointments online.

- To set one of the cancellation reasons as a default, highlight the required reason, right click and select **Set Default**. The default text displays in bold:



Staff Tab

The **Staff** tab allows you to decide which clinical staff appear in online appointments and are available for your patients to book.

To set up your staff:

- From the **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.
- The following options are available however we recommend you do not use them as they do not allow the correct mix of staff:
 - All Staff** - Displays all active clinical staff listed in **File Maintenance** (including admin staff with a clinical role):

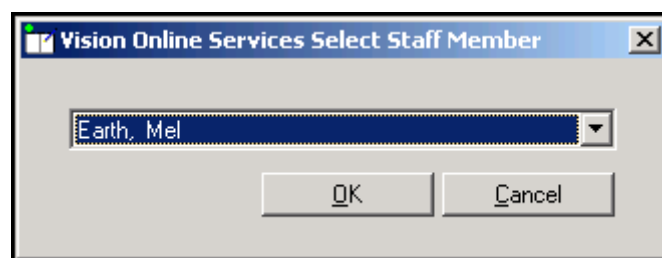


 **Note** - This can lead to a very long list of clinicians being offered to your patients.


- Usual GP** - Displays only the patient's Usual GP.
- Salaried GP** - Displays only those GPs set as **Salaried GPs** in **File Maintenance**.

To setup staff individually (Recommended):

1. From the **Vision Online Services Appointments Configuration** screen, remove the tick from **All Staff**.
2. Select **Add** and a list of all clinical staff from the **File Maintenance** list displays.
3. Select the required clinician's name from the list and select **OK**:



4. Repeat steps 2 - 3 until you have added all the staff required.
5. Select **Cancel** to finish.

 **Note** - Staff need to be set up as normal in **Control Panel - File Maintenance** and **Appointments** for you to be able to **Add** into **Online Services Staff** tab.

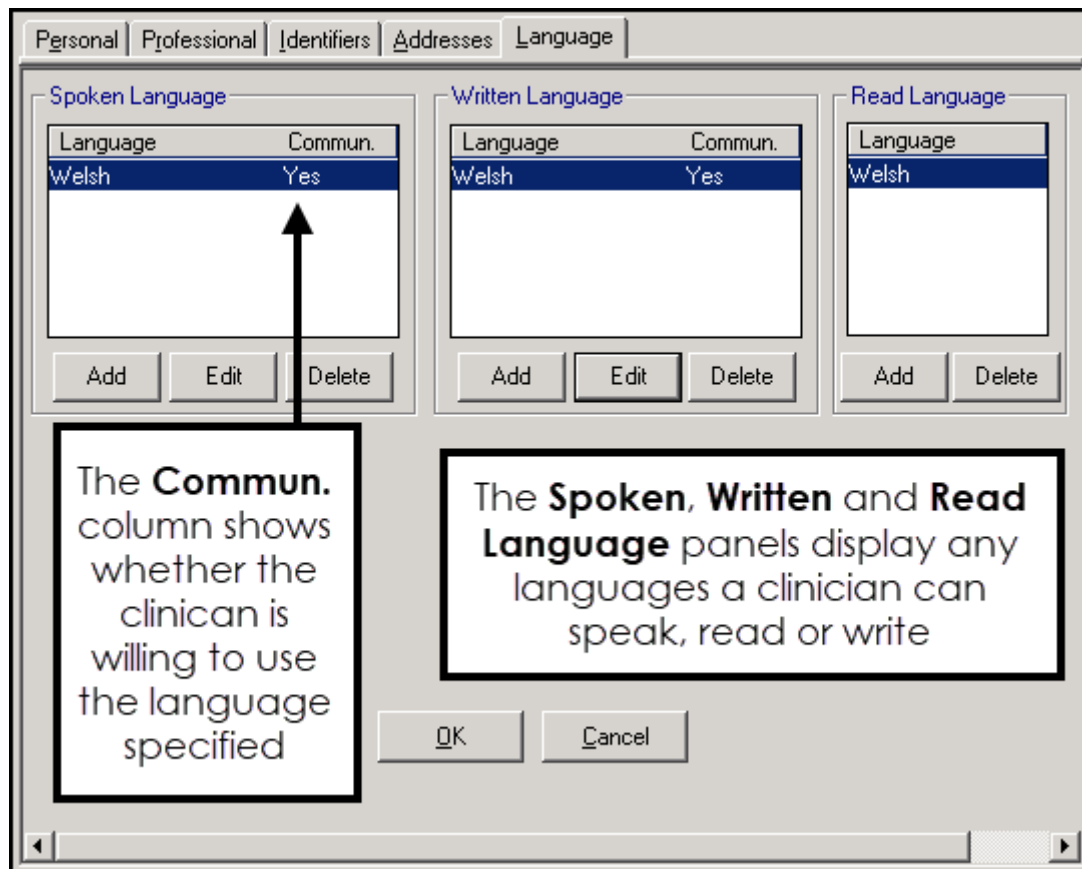
Adding Gender, Special Interests & Language

Gender, Role, Special Clinical Interests, Written and **Spoken languages** of any clinician providing online appointments displays online. For each clinician selected for online appointments the following should be completed:



1. From **Vision 3 - Control Panel** - **File Maintenance - Staff** select the staff member, right click and select **Edit Staff**.
2. Complete each tab as follows:
 - **Personal** - Select **Sex** and then select the correct gender.
 - **Professional:**
 - Check the **Role** selected is correct.
 - Set the **Main** and **Interest Specialty** from the available lists.
 - **Language** - Check the **Spoken, Written** and **Read** languages options are complete and correct where added:
 - To add a language if required, select **Add** under the correct section (**Spoken, Written** or **Read**), select from the available list and select **OK**.

3. Select **OK** to save:



Personal | Professional | Identifiers | Addresses | Language

Spoken Language

Language	Commun.
Welsh	Yes

Add Edit Delete

Written Language

Language	Commun.
Welsh	Yes

Add Edit Delete

Read Language

Language
Welsh

Add Delete

The **Commun.** column shows whether the clinician is willing to use the language specified

The **Spoken, Written and Read Language** panels display any languages a clinician can speak, read or write

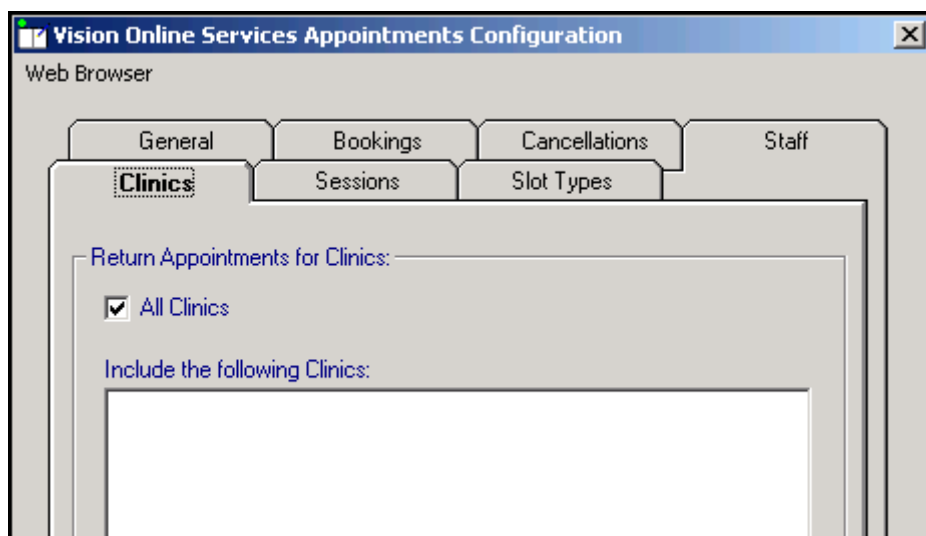
OK Cancel

Clinics Tab

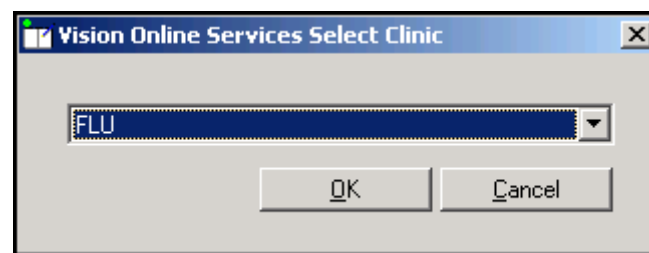
The **Clinics** tab enables you to determine which clinics (ad-hoc sessions that are not linked to a specific clinician) are available to your patients online.

To add clinics:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. **All Clinics** is ticked by default, to change this to specific clinics, remove the tick:



3. Select **Add** and the **Vision Online Services Select Clinic** screen displays:



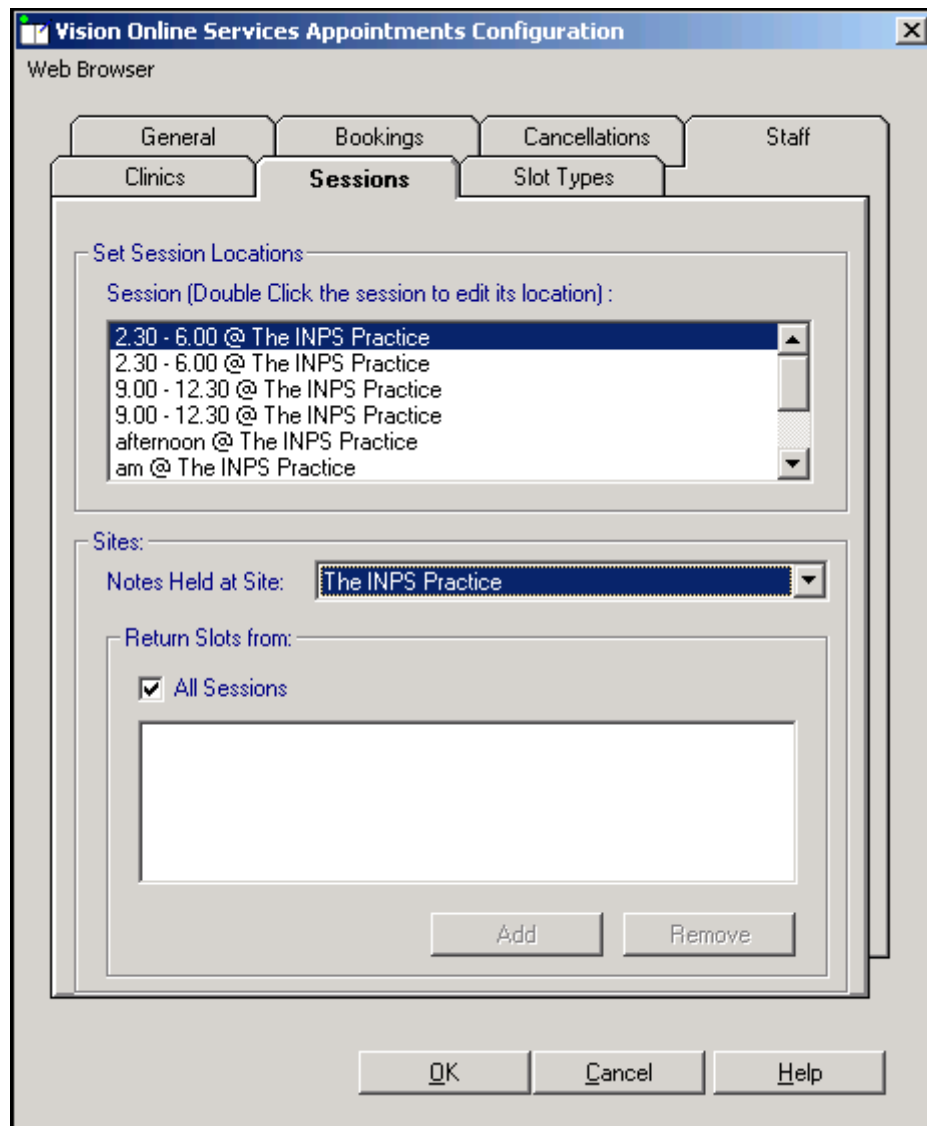
4. Select the required clinic from the list and select **OK**.
5. Repeat step 3 and 4 until you have added all the clinics you require.
6. If you have selected all the clinics in the list you are prompted '*All available clinics have been added to the list.*', select **OK** to continue.

To remove a clinic from the list:

1. From **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.
2. Highlight the clinic to remove.
3. Select **Remove**.
4. You are prompted '*Are you sure that you want to remove (name of clinic) from the list?*', select **Yes** to remove.

Sessions Tab

The **Sessions** tab allows you to configure site access and locations for sessions available within online appointments:



To set Sessions, Locations and Sites:

1. From **Online Services Appointments Configuration** screen, select the **Sessions** tab.
2. Complete as required:
 - **Set Session Locations:**
 - **Session (Double Click the session to edit its location)** - Lists all sessions added or created in **Appointments**. Double click on a session to display the list of available locations, select the location you require and select **OK**.
 - **Sites** - Specifies which sessions should be included for each location. This enables you to limit which sessions are included online:

- **Notes Held at Site** - Select the site required and then either leave the tick in **All Sessions** or remove the tick and select **Add** to select the specific sessions required and repeat as necessary. Select **Cancel** to finish. If you have branch surgery(s) change **Notes Held at Site** to the alternative location and add sessions in the same way.

To remove a Session from the list:

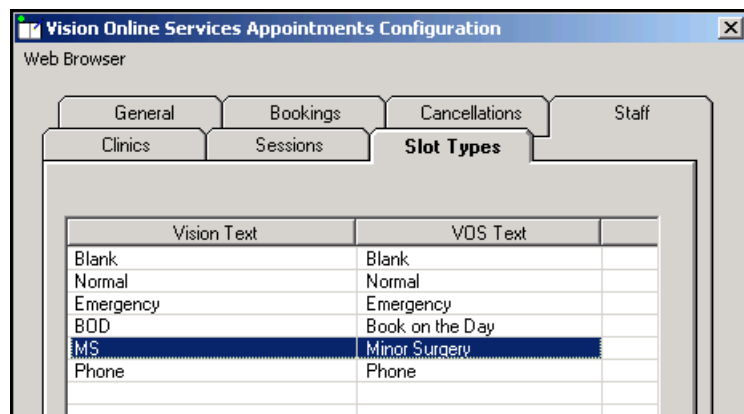
1. Highlight the required session and then select **Remove**.
2. You are prompted '*Are you sure that you want to remove (name of session) from the list?*', select **Yes** to remove.

Slot Types Tab

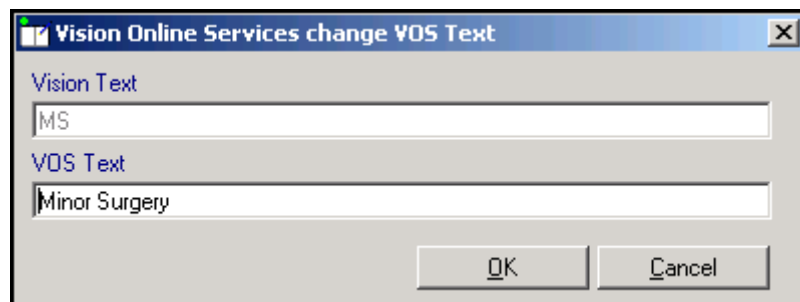
The slot type displays when your patients are booking appointments online. Text used on slot types by staff should be changed to something appropriate for patients, for example 'MS' should be changed to 'Minor Surgery'.

To change the slot type text your patients see:

1. From **Vision Online Services Appointments Configuration** select the **Slot Types** tab:



2. Double click the slot type to update and the **Vision Online Services change VOS Text** screen displays:



3. In **VOS Text**, enter the text you want to display and select **OK** to save.
4. Repeat steps 2 - 3 until all the slot types have **VOS text** listed.

Once you have considered and completed all seven tabs as required, select **OK** to save and close the **Vision Online Services Appointments Configuration** screen.



Remember - You need to revisit **Appointments Configuration** when a new clinician joins or leaves your practice.



You must now configure online appointments from Appointments. See [Creating Online Appointment Slots](#) on page **20** for details.

Creating Online Appointment Slots

Once you have enabled and configured online **Appointments** from **Control Panel** you must decide how much of your appointment book you want your patients to have access to online. You need to consider:

Configuring Slot Types for Web Use

Appointments booked by your patient online must be reserved by being marked **Reserved for Web**. You can do this either manually or automatically.

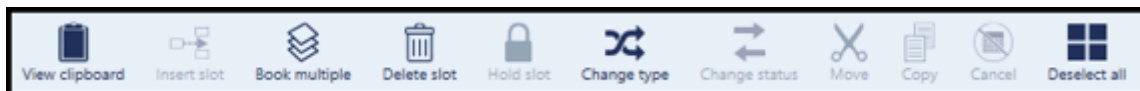
Defining a slot as **Web Default** automatically allocates the slot(s) for use with online services. Each time your appointment books are extended the slots are automatically created and marked **Reserve for Web**. These slots can also be booked as normal in the practice.


Manually Defining a Slot as Available Online

To manually set a slot as **Reserved for Web**:

1. From **Vision 3 - Appointments** , from either the **Session** or **Day** view, right click on the appointment(s) required.

2. **nn items selected**  appears at the bottom of the screen confirming the number of items selected and the toolbar activates at the top of the screen:

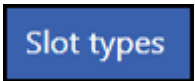




3. Select **Change type** .
4. Select **Reserved for Web** from the available list and the selected slot(s) update to **Reserved for Web**.

Automatically Creating Slots Available Online

To automatically create **Web booking** slots:

1. From **Vision 3- Appointments Setup** , select **Slot types**




2. Select either **Add slot type**  or select the slot to edit and select **Edit** .

3. Complete the **Slot Type** details in the usual way.
4. Tick **Web bookings**.
5. Select **Apply**.

 See the [Appointments Help Centre](http://help.visionhealth.co.uk/Appointments_new/content/home.htm) (http://help.visionhealth.co.uk/Appointments_new/content/home.htm) and the [Appointments Setup Help Centre](http://help.visionhealth.co.uk/Vision_Appointments_Setup/Content/Home.htm) (http://help.visionhealth.co.uk/Vision_Appointments_Setup/Content/Home.htm) for further details.

Setting up Online Prescriptions

 **Note** - You must have System Administrator rights to enable and configure patient online services.

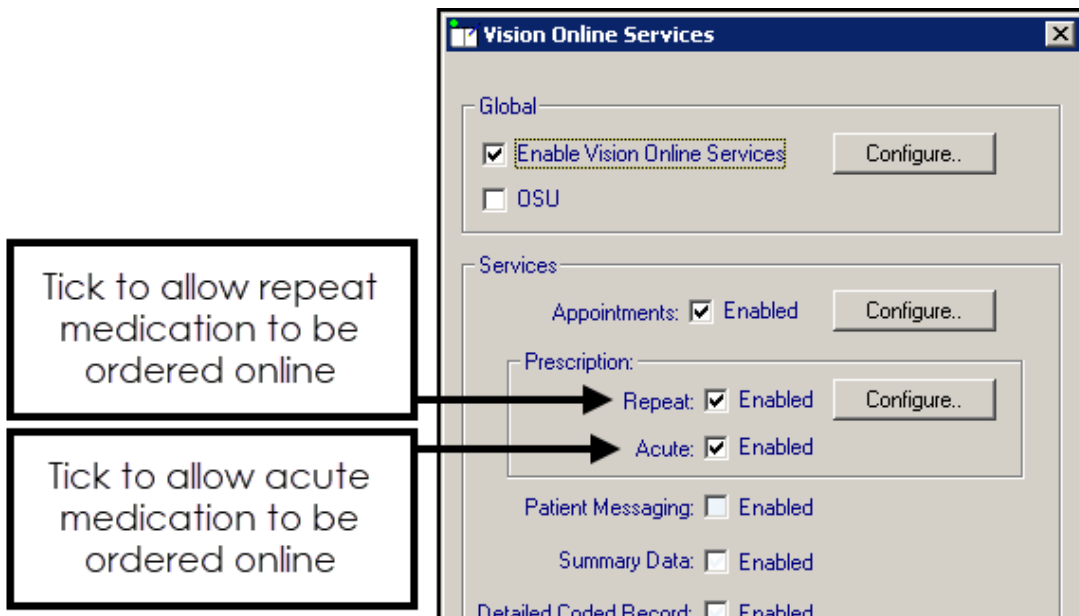
To enable online prescriptions:

1. From **Vision 3 - Management Tools**, select **Control Panel – File**

Maintenance - Online



2. The **Vision Online Services** screen displays, from **Prescription** select the following as required:



Tick to allow repeat medication to be ordered online

Tick to allow acute medication to be ordered online

- **Repeat** - To enable your patients to order repeat medications online.
- **Acute** - To enable your patients to request acute (one off) medications:

3. Now select **Configure** to customise how online prescriptions works for your practice.

Configuring Online Prescriptions

You need to configure how your patients see prescriptions within your patient online services website. You should consider the following:

- From **Control Panel - Online:**
 - **Prescription Message** on page **23**
 - **History** on page **24**
 - **Patient Message** on page **24**
- And from **Control Panel:**
 - **Define Old Repeat Offset** on page **25**

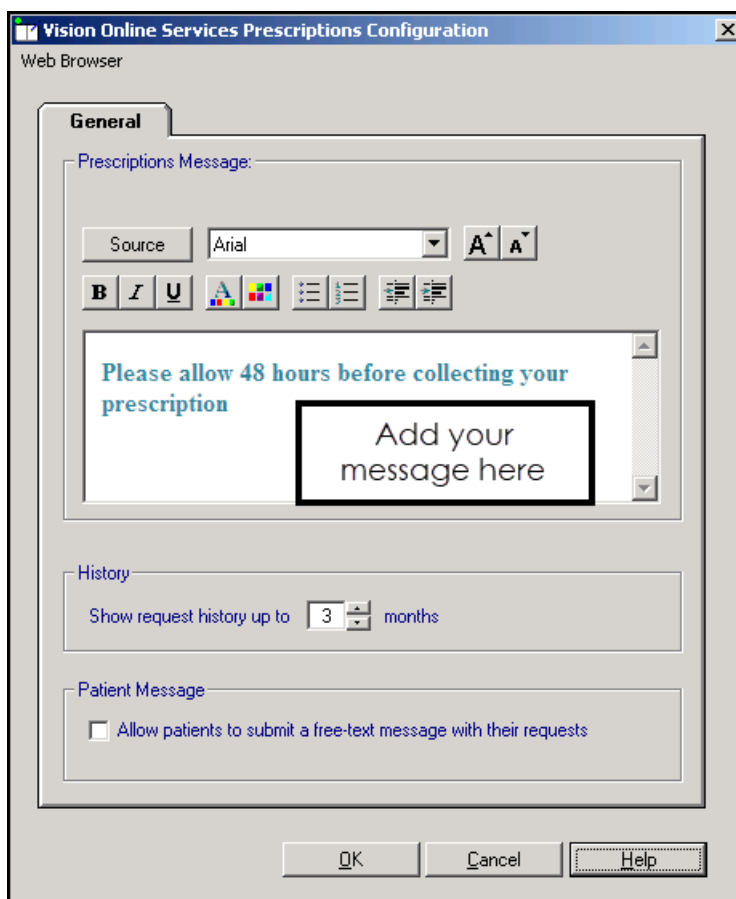
Once you have finished configuring each option, select **OK** to save and close.

Prescription Message


The prescription message displays within the **My Prescription** section of your patient online services website.

From **Control Panel - Online Services - Prescriptions Configuration**, enter your message in the **Prescriptions Message** section of the **General** tab using either:

- The formatting editor provided, see **Using the Message Editor** on page **26**, or
- HTML formatting tags, see **Formatting HTML Messages** on page **27**:



The screenshot shows a window titled "Vision Online Services Prescriptions Configuration" with a "Web Browser" address bar. The "General" tab is active. The "Prescriptions Message" section contains a text area with the text "Please allow 48 hours before collecting your prescription" and a smaller box with "Add your message here". Above the text area are formatting options: "Source" (Arial), font size (A⁺ A⁻), and icons for Bold (B), Italic (I), Underline (U), Color, Background Color, Bulleted List, Numbered List, and Indent. Below the text area is the "History" section with "Show request history up to" a spinner set to "3" and "months". The "Patient Message" section has a checkbox "Allow patients to submit a free-text message with their requests" which is unchecked. At the bottom are "OK", "Cancel", and "Help" buttons.

 **Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Prescription Welcome Message** 'In the case of a query regarding a prescription please contact the surgery in the usual way'.

History

You can set a time frame for the patient repeat request history displayed:



- From **Vision 3**, select **Control Panel** - **Online Services - Prescriptions Configuration - General - History** use the arrows to select a from between 1 - 12 month(s):



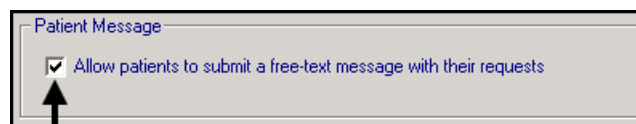
Select a time frame for prescription history to display

Patient Message


You can allow your patients to contact you via their prescription request:



- From **Vision 3**, select **Control Panel** - **Online Services - Prescriptions Configuration - General - Patient Message**, tick **Allow patients to submit a free-text message with their requests**:



Tick to allow patients to submit messages with their medication requests

 **Note** - When this option is selected, a warning message displays, advising the practice to ensure that the necessary processes are in place to check any messages entered by the patient.

Define Old Repeat Offset

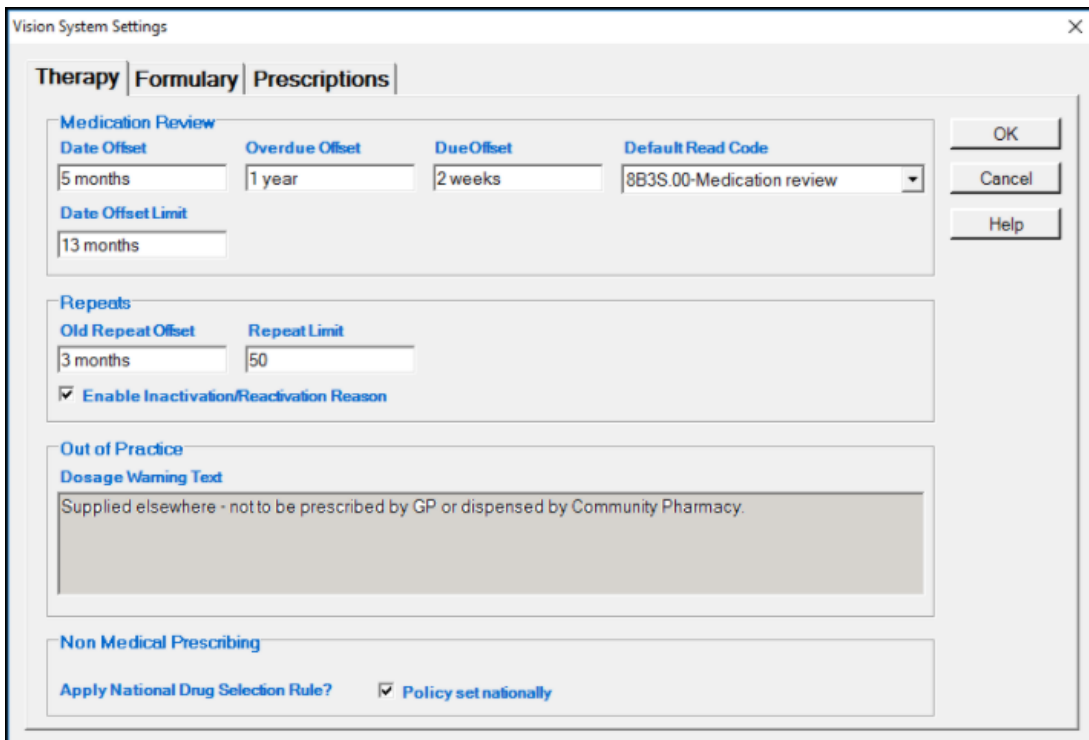
The **Old Repeat Offset** determines what repeat prescriptions can be ordered online.

To change the **Old Repeat Offset**:

1. From **Management Tools - Control Panel - File Maintenance**, select



2. The **Vision System Settings** screen displays, select the **Therapy** tab:



Vision System Settings

Therapy | Formulary | Prescriptions

Medication Review

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

Date Offset Limit

13 months

Repeats

Old Repeat Offset	Repeat Limit
3 months	50

Enable Inactivation/Reactivation Reason

Out of Practice

Dosage Warning Text

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

Non Medical Prescribing

Apply National Drug Selection Rule? Policy set nationally

OK
Cancel
Help

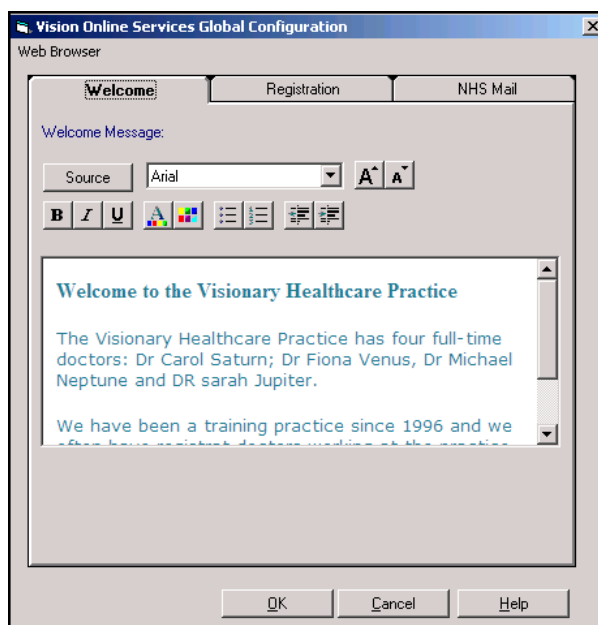
3. In **Repeats - Old Repeats Offset**, enter a time span, for example, if you select an offset date of '3m', patients can only order repeat prescriptions issued within the last 4 months. Repeats not issued within this time display on the **Unavailable** list.
4. Select **OK** to save and close.

Patient Online Services Configuration Utilities



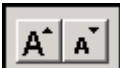




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Using the Message Editor

The message editor allows you to format messages displayed online. It is available in the **Welcome**, **Appointments** and **Prescription** message configuration screens:



Enter your message in the **Welcome Message** screen using the following formatting:

-  **Source** - Displays the HTML source of the message and is the only way you can add tables. If you are comfortable working with HTML tags, you may want to use this view to edit the HTML directly.
-  **Font** - Allows you to change the font.
-  **Font size** - Allows you to increase and decrease the text size of the highlighted text.
-  **Bold, Italic, Underlined.**
-  **Text colour/ Background colour.**
-  **Bulleted/numbered list.**
-  **Decrease/increase indent.**

Formatting HTML Messages

Messages can be formatted using HTML formatting tags. HTML tags are:

- Used either side of a keyword you wish to format.
- The tag always has angle brackets denoting the starting and closing of the tag, for example, <html>.
- HTML tags normally come in pairs, for example, (the starting tag) and (the closing tag).
- You can use multiple tags, but each tag must have brackets at the start and end of the tag, for example, <p>.

This is a list of the most common codes:


Starting Tag	Closing Tag	Description
<h1>	</h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <h6> is the smallest.
<p>	</p>	Paragraph
		Bold text
<i>	</i>	<i>Italic text</i>
<small>	</small>	Small text
_		Subscript text
[]	Superscript text
 		This tag adds a single line break, it does not need a closing tag.

For example applying the bold tag to the 1st line of the message like this:

- Welcome to the Visionary Healthcare Practice


Displays as:

- **Welcome to the Visionary Healthcare Practice**

 **Note** - If you want to add an image to your message, you must link to an image which can be accessed over the Internet and not one stored locally. Locally stored images cannot be displayed on the website.

Patient Email

When you migrate to the **Cegedim Primary Care Hosted Solution** the following email is automatically sent to any patients with Read code **9IW..00 Registered for access to Patient Facing Services** on their record:

 **Note** – The content in '*italics*' is merged with the patient details.

Example Email

 **Important - This email is not monitored.**

If you reply to this email, your reply will not be read or actioned.

In the case of life threatening emergencies, please ring 999. In other cases, please contact your surgery direct.

Dear *Forename Surname*,


Your GP surgery are changing their computer system. As a result of this, the online service you use to book appointments and order your medications is also changing.

Below are the codes you need to enable you to register for a new **Patient Services** account.

It is important that you keep these details safe, you are responsible for them upon receipt.

Creating your New Patient Services Account and Linking it to your Practice

1. From your internet browser, go to <https://www.patient-services.co.uk/web/ps/register> and select **Yes**.
2. Please enter your practice ID to continue displays, enter your Practice ID **{Practice Id here}** and select **Submit**.
3. The **Create your account** screen displays, complete as follows:
 - **Account ID** - Enter '**{Account ID here}**'
 - **Linkage Key** - Enter '**{Linkage code}**'
4. Now complete the **Account Details** section as follows:
 - **Username** - Create a unique user name (min 3 characters) - This is the name you will use for logging into **Patient Services**.

 **Note** - Once registered, you cannot change your **Username**. The only symbols allowed here are dots and dashes, so you cannot use your email address.

- **Password** - Type a new password, this must be a minimum of 8 characters containing at least one character from three of the following four character types:
 - Uppercase letter
 - Lowercase letter
 - A number
 - A symbol
 - **Confirm Password** - Retype your password to confirm.
5. Complete the **Personal Details** screen with the following details:
- **First Name** - This should match the first name recorded at your GP Practice).
 - **Last Name** - This should match the last name recorded at your GP Practice).
 - **Email** - Enter your email address (this should match the address recorded at your GP Practice).
 - **Confirm Email** - Retype your email to confirm.
 - **Date Of Birth**.
6. Read the **Terms & Conditions** and **Privacy Policy**, and tick to confirm acceptance of these conditions.
7. Select **Register** to create your **Patient Services** account.
8. The email verification message displays. Close the **Patient Services** screen and log into the email account for the email address you have entered.
9. Locate the **Patient Services** verification email and select the link.

You are now registered for **Patient Services**, can log in and use all the online services your GP surgery has enabled.

 See http://help.visionhealth.co.uk/Patient_Services_-_Patient_Help_Centre/Content/Home.htm for detailed information on the services available, printable guides, frequently asked questions and video tutorials.

Yours sincerely

{Name of practice here}
