Vision 3

Northern Ireland Clinical Communications Gateway (CCG) User Guide

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Northern Ireland Clinical Communication Gateway (CCG)

Introduction

Clinical Communications Gateway (CCG) is a national system in Northern Ireland for the electronic exchange of clinical information, such as referrals, that integrates primary and secondary care systems using familiar yet highly secure Internet technology.

Vision practices are able to access CCG from within Consultation Manager and send referrals directly to healthcare providers via the NHSNet. This utilises the Scottish SCI Gateway system. You can then monitor the progress of referrals once they have arrived at the hospital.

This guide explains the integration of CCG with Vision, and how to access and logon to CCG in order to create and send referrals.

What's New

DLM 430

- It is no longer mandatory to be a clinician with a GMC code to create CCG referrals.

DLM 410

SCI Gateway has introduced several new message types that can be utilised through Vision. The new message types are:

- **Advice Request** – A message you create that enables you to ask advice from consultants. See Advice Request on page 14.
- **Advice Response** – A reply to an advice request. See Advice Response on page 16.
- **Discharge Notification** – A message notifying you of patient discharge details. See Discharge Notification on page 17.

- **Supplementary** – A message you can create that acts as an appendage to a pre-existing Advice Request or Referral. See Supplementary Message on page 18.

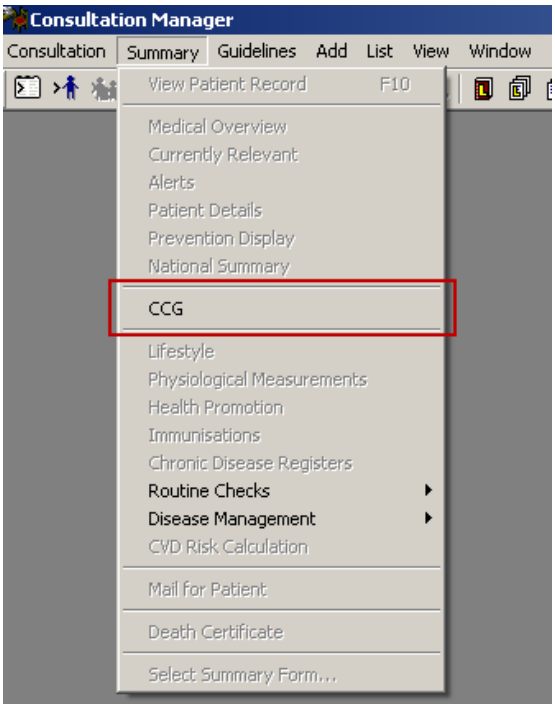
SCI Gateway User Guides

The most up-to-date User Guides explaining the full referrals features and SCI Gateway can be downloaded from www.sci.scot.nhs.uk/training/train_docs.htm

Accessing CCG from Consultation Manager

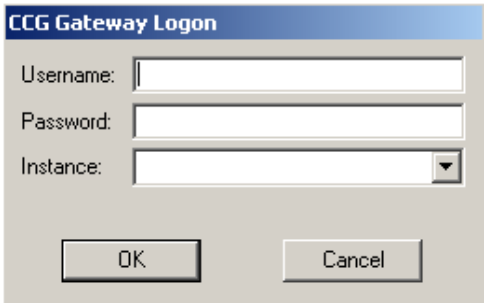
Once your Project Facilitators have set your system up for CCG, you need to check that you can log in to CCG via Consultation Manager. To do this you need the login details provided by your Local Health Board (LHB).

1. From Consultation Manager (with or without a patient selected), select **Summary – CCG**.



Summary menu, CCG highlighted

2. A CCG window opens and you are prompted to login to CCG. Log in using the login details provided by your Health Board. These details are stored in Vision so that the next time you access CCG through Vision, you are logged on automatically.



CCG Logon

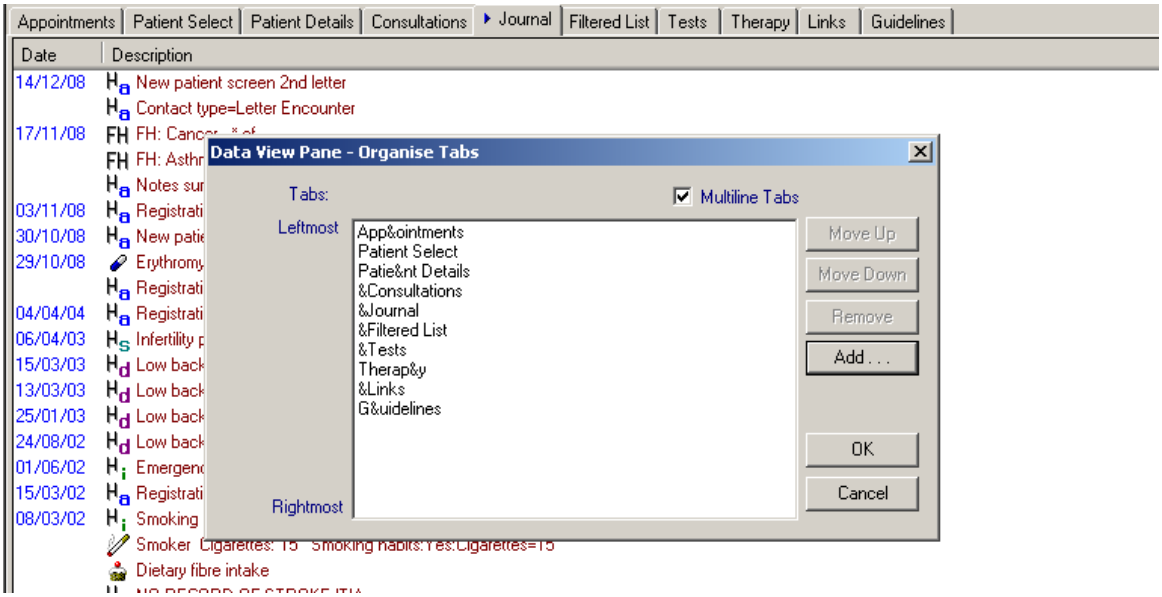
Note - You should change your password when prompted by Vision, NOT in the stand alone application.

Remember – This will log you into SCI Gateway until the Northern Ireland website is finalised and Vision updated.

Adding CCG tab

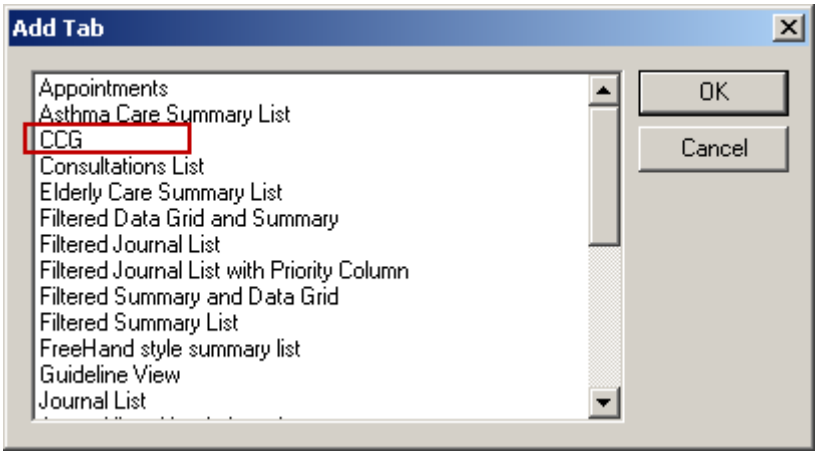
For quick and easy access to CCG, you are also able to add a CCG tab to your Consultation Manager view.

1. Select any patient and display your usual Patient Record view.
2. Point the cursor on any of the tab headings, e.g. Journal, right click and select **Organise Tabs**.



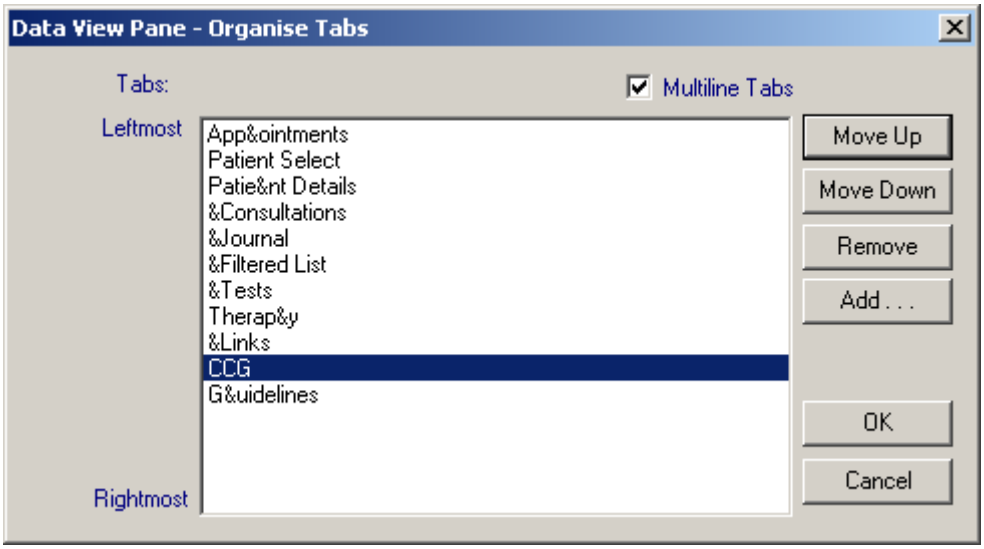
Data View Pane – Organise Tabs

3. Click on **Add**.
4. Select CCG and click **OK**.



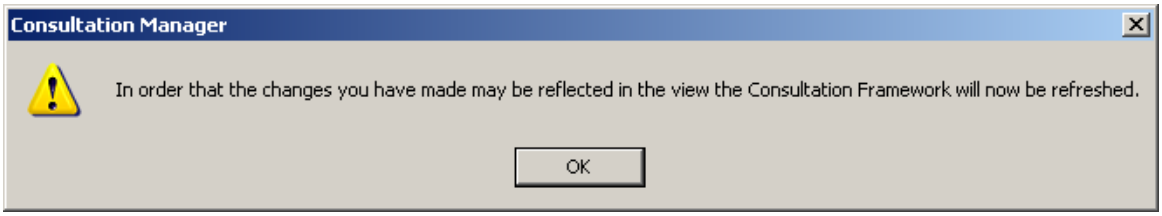
Add Tab with CCG highlighted

5. CCG is added to the bottom of the list in **Data View Pane - Organise Tabs**. We recommend that you click on **CCG** and then click **Move Up** until it is positioned above the **Management** or **G&uidelines** tab (the one that displays Management Plans - always better to keep this one on the extreme right).



Data View Pane – Organise Tabs with CCG added

6. Tick on the box **Multiline Tabs** (this displays the patient record tabs in two rows).
7. Click **OK** to save and close.



Refresh message

8. Click **OK** to refresh the Patient Record View.
9. The new **CCG** tab is now added to your view.

Note - CCG can be accessed from **Summary – CCG** if you do not have a patient selected in an open consultation.

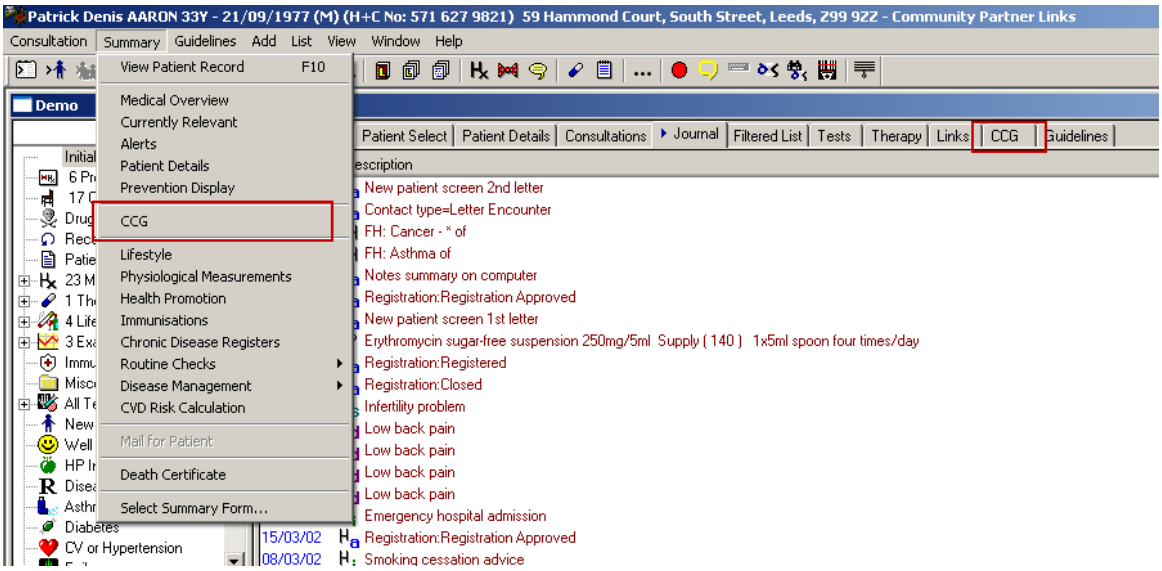
Creating an Integrated Electronic Referral Using Vision

Instead of using the CCG Icon on your desktop, CCG now integrates with Vision via Consultation Manager.

- The section, entitled Patient Context (see below), describes *selecting a patient first* in Consultation Manager, then selecting CCG.
- The section, entitled Practice Context (see page 6), describes CCG without first selecting a patient.

Patient Context

1. From Consultation Manager, select the patient to be referred.
2. Select **CCG** from the **Summary** menu or click on the **CCG** tab if you have one (see Adding CCG tab on page 4 for instructions).

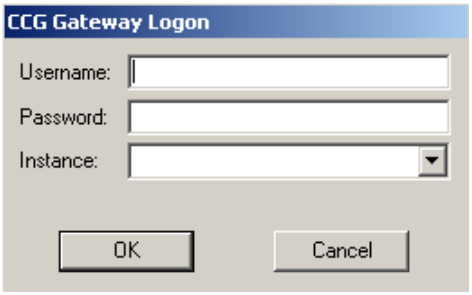


Access from either Summary – CCG or CCG tab, both options highlighted

3. From the CCG screen, click on **Logon** to display the login window. Sign in and click **OK**.

> **Note** - Your local health board issue and maintain user names and passwords and any queries regarding these should be directed to them in the first instance.

When you log into CCG for the first time, you are asked to change your password for security purposes. First key in your **current password**, then enter your **New Password** and re-enter it in **Confirm New Password**. Then click on **Update Password**.

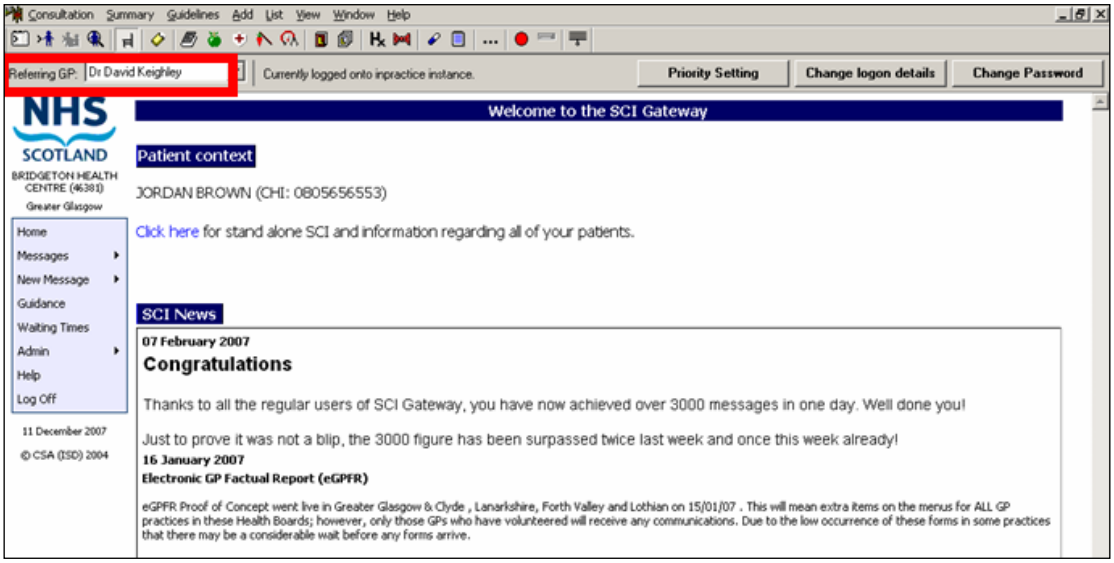


CCG Gateway Logon

Remember – This will log you into SCI Gateway until the Northern Ireland website is finalised and Vision updated.

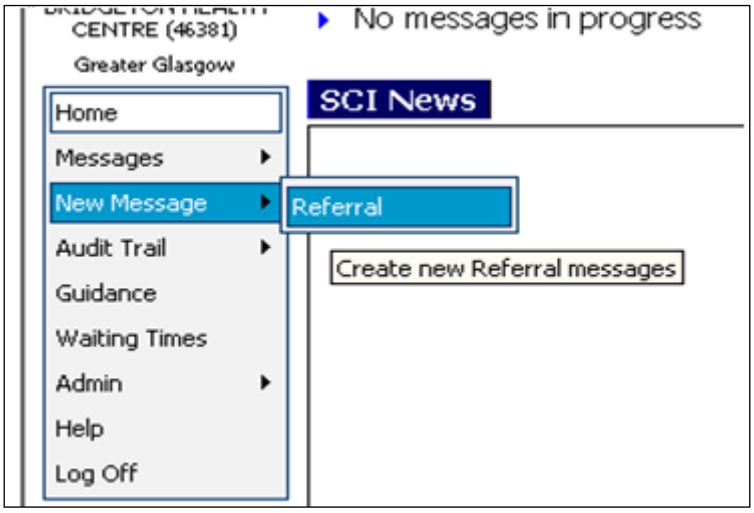
4. The CCG Referral Screen is displayed ready for you to complete the referral.

Note - In the top left hand corner of the window there is the "Referring GP" drop down menu which allows you to select the referring GP before creating the referral.



CCG Main Screen

5. In the left-hand pane, click on **New Message - Referral**.



New Referral Message

6. Check the details then **Send Referral**.
    - View audit trail - tells you if you have any new discharge summaries. Also View Discharge audit trail.
    - At the top left, it shows the number of referrals in progress. You can **Make a New Referral** or **View Referral Audit Trail**.
    - You should check the Information pane regularly for any important information.
7. When the referral has been completed in CCG, and submitted, a copy is saved as an attachment in Vision. The referral has a **Type of Attachment** of **CCG Referral Letter**.

IMPORTANT - If you open a patient consultation whilst processing referrals for other patients, the referrals are not created or sent and are added to the CCG work list with a status of "In Progress". To complete the process, you would have either to log on to CCG via Practice context (see page 9) or log on via Patient Context by selecting the patient first in Consultation Manager.

Therefore if you do have multiple CCG referrals to process at the same time, please make sure that you either:

Access CCG from Consultation Manager from **Summary - CCG** with **no patient selected** (see Practice Context on page 9).

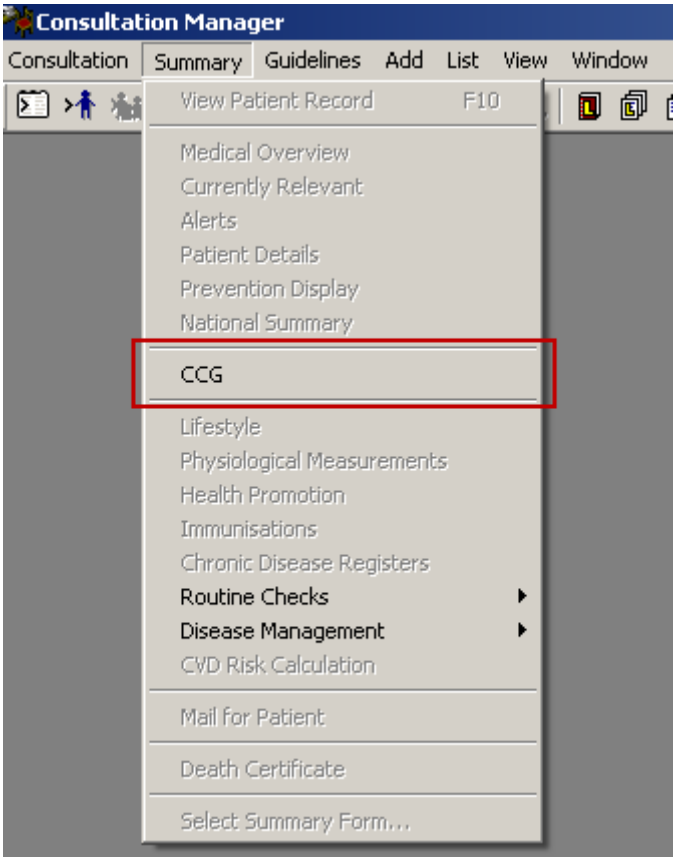
OR

Select each patient to be referred individually and exit CCG and the Consultation after each patient.

Practice Context

In this section, no patient is selected first before accessing CCG.

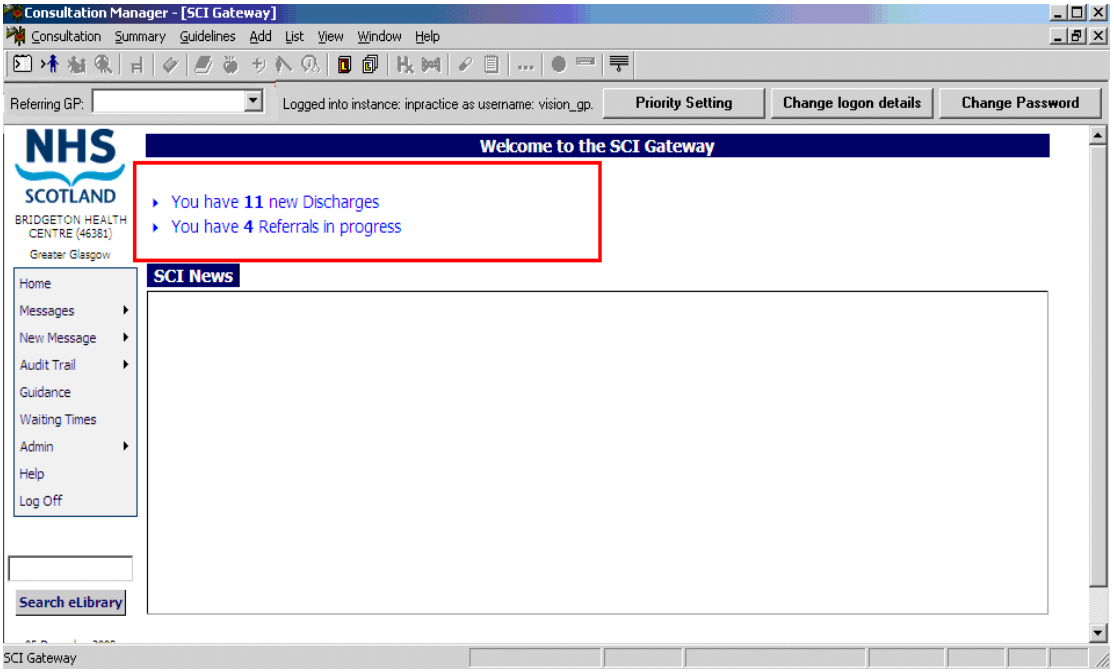
1. Do not select any patient in Consultation Manager.
2. Select **CCG** from the **Summary** menu.



Access CCG from Summary with no patient selected

3. At the CCG screen, click on **Logon** to display the login window.
4. Sign in and click **OK**.
5. The CCG Referral Screen is displayed. General information regarding the number of discharges and referrals in progress is displayed. No patient details are displayed on this form.

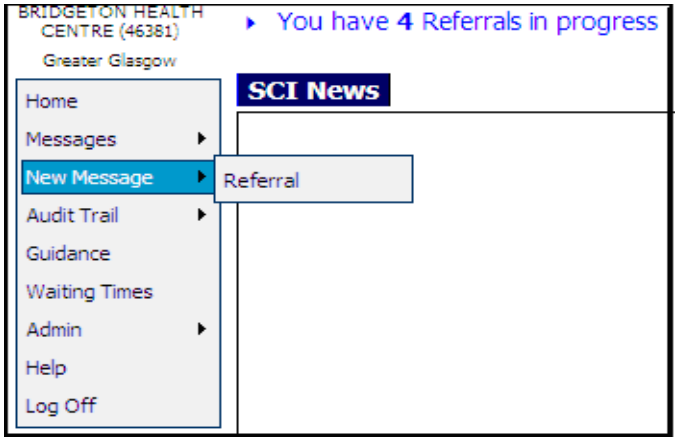
Remember – This will log you into SCI Gateway until the Northern Ireland website is finalised and Vision updated.



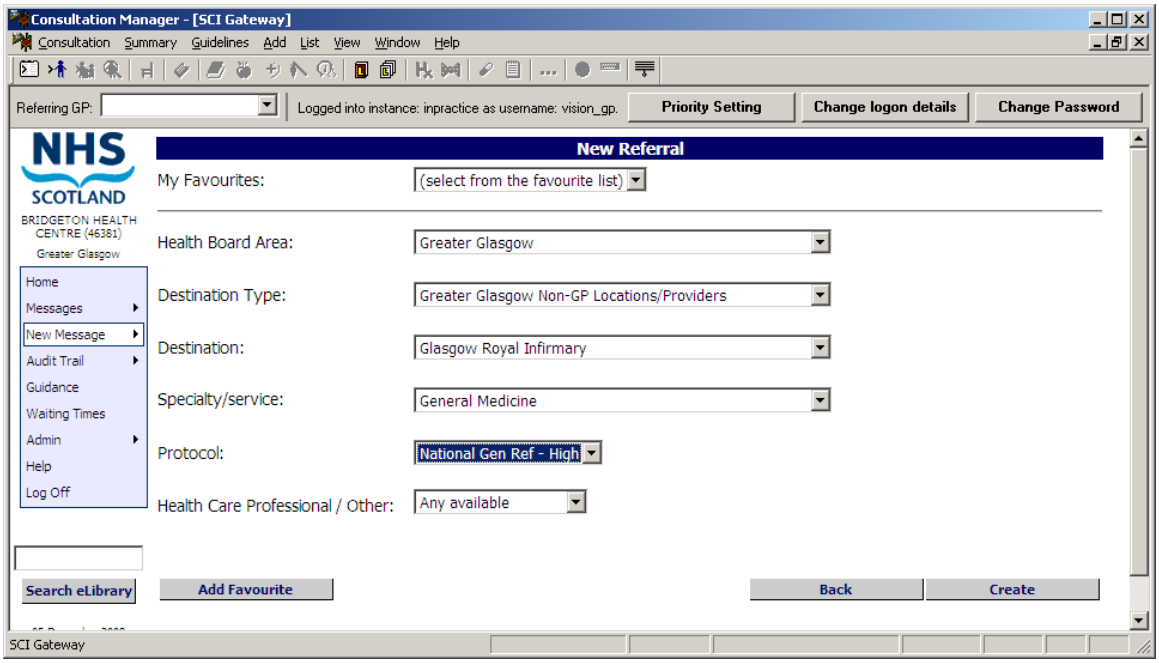
CCG Main Screen when in Practice Context

Note - Referrals can also be completed from here.

6. Check to see the **Referring GP** drop down menu in the top left hand corner of the window is not blank. Select the referring GP if this is blank.
7. From the left-hand pane, click on **New Message – Referral**.

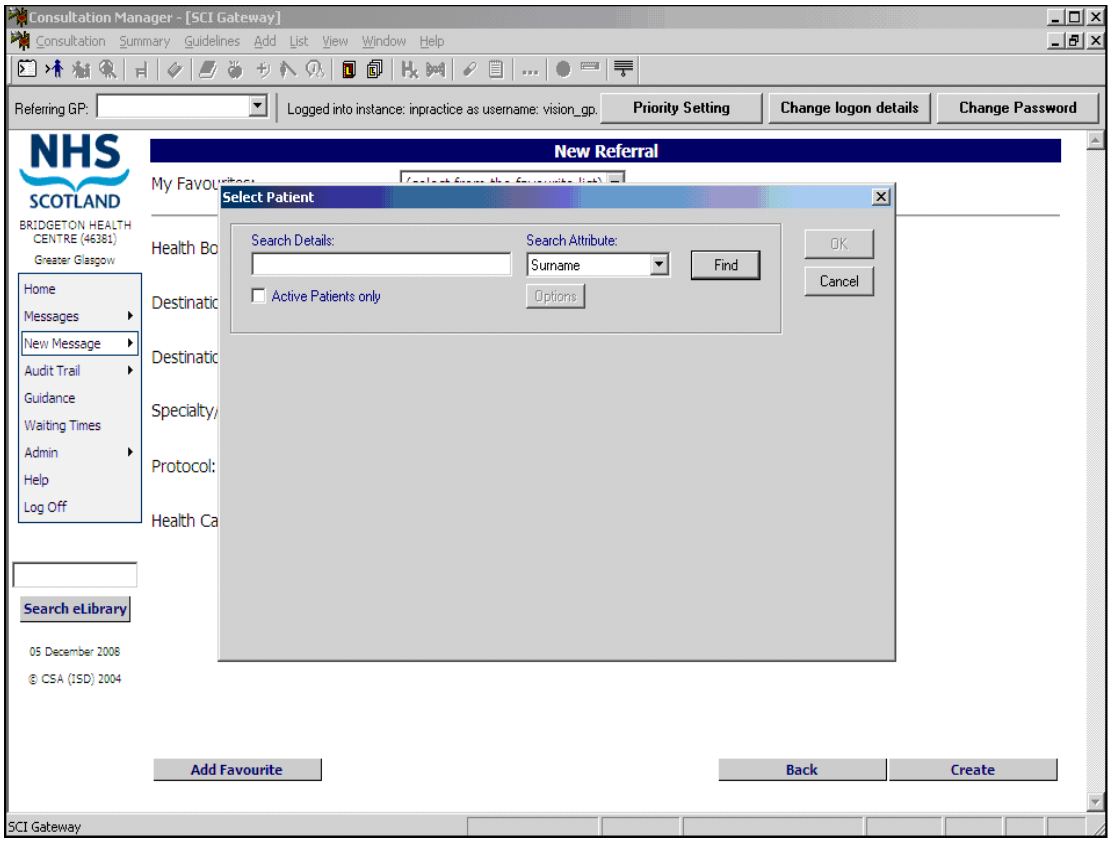


New Message - Referral



New Referral

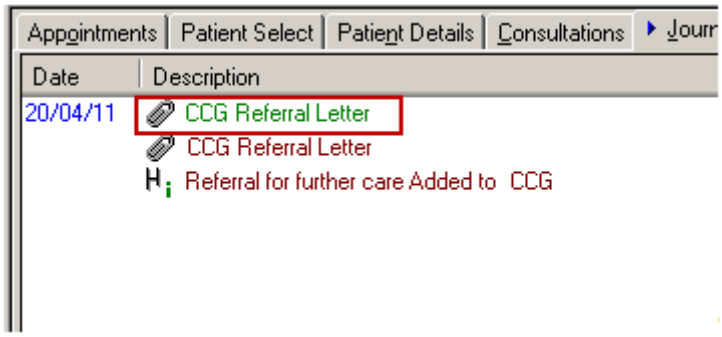
8. Complete the details required, including Referring GP.
9. Click on **Create**.
10. **Select Patient** is displayed, select the patient being referred.



Select patient to refer

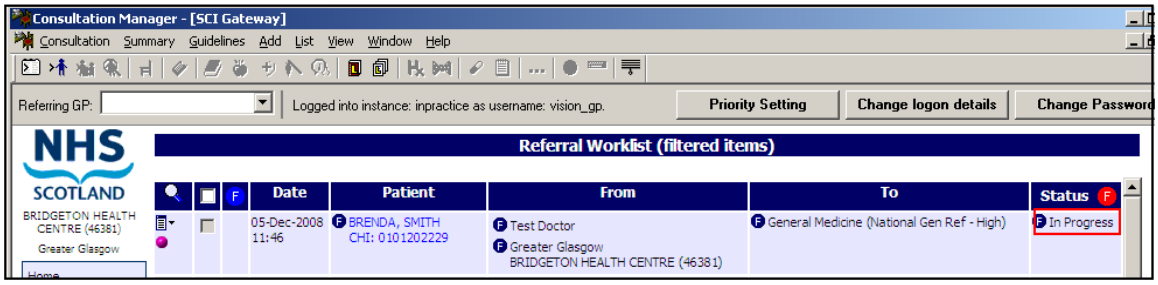
11. Check the details then click **Send Referral**.

12. When a referral has been completed in CCG and submitted, a copy is saved to the patient's record as an attachment within the patient record.



Example of CCG attachment within a patient record

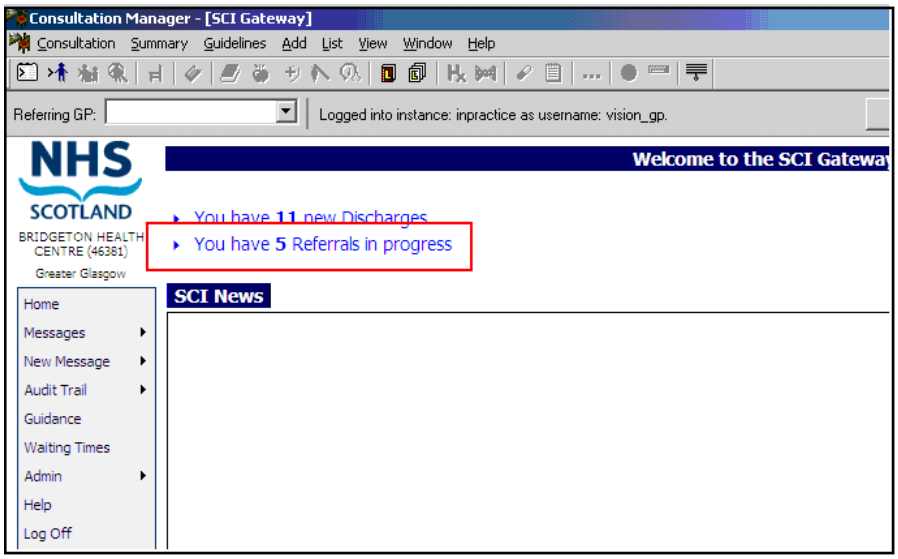
Important - When creating a referral in practice context, **DO NOT** open a consultation for any patient. If you do, the referral would not be sent; rather it would be parked in the CCG referral work list with the status **In Progress.**



Referral Worklist showing an In Progress referral

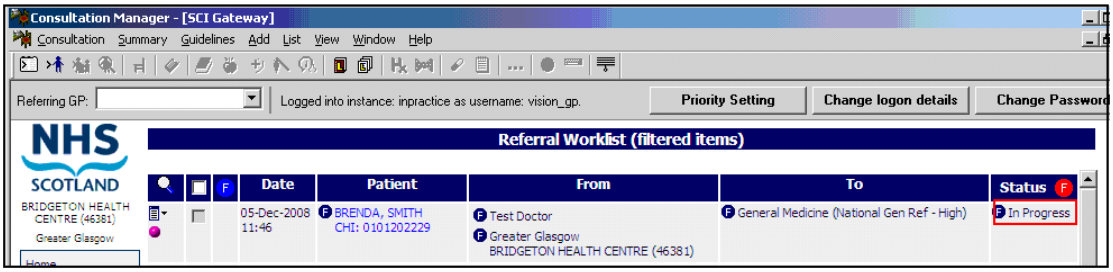
If this happens, you must complete the task via Patient Context in one of the following ways:

- Select the patient in Consultation Manager. Log on to CCG and click on **Message – Referral.** The incomplete referral would be displayed in the **Referrals Worklist** with status '**In Progress'**. Click on it and complete the outstanding task.
- Close all consultations and log on via practice context (ie, without selecting a patient) and click on the hyper link on the Home page that says you have a certain number of referrals in Progress. This takes you to the filtered CCG work list that displays only the referrals **'In Progress'**.



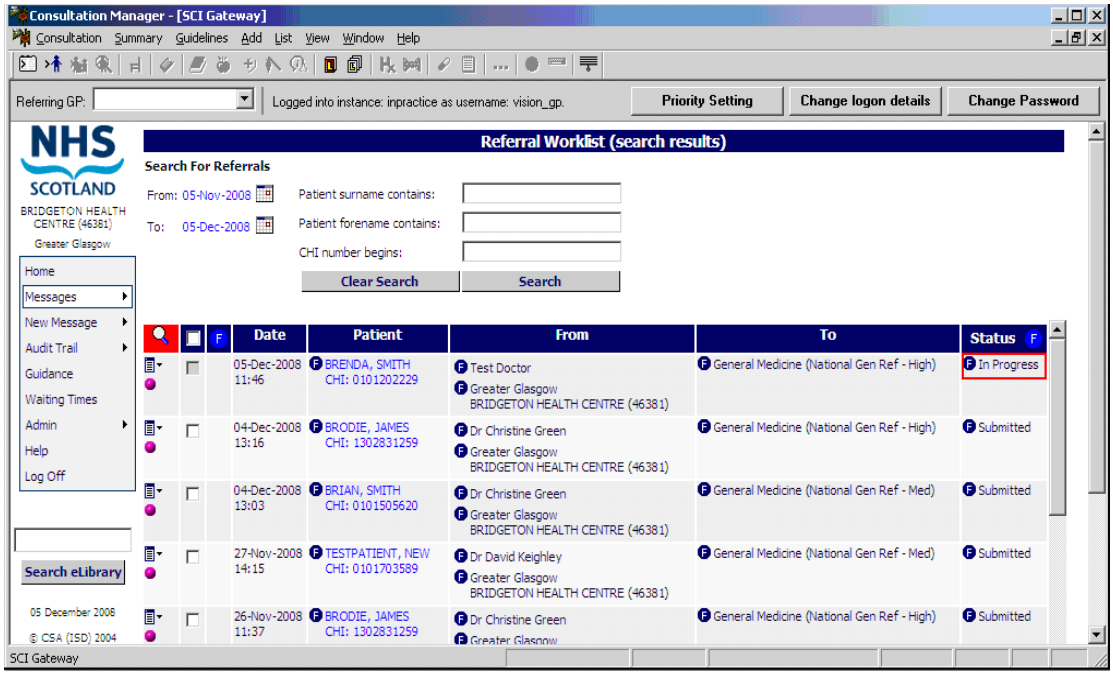
Information regarding outstanding Referrals

Click on the patient required and complete the outstanding task.



Filtered List of Referrals

The same action can be completed by clicking on **Message – Referral.** This displays the unfiltered list of referrals including submitted referrals. Select the patient with the status **'In progress'** from the work list, and complete the outstanding task.



Unfiltered Referral Worklist

Training Tip - If processing multiple CCG Referrals, you should always check the status of the referrals by logging into CCG from **Practice context** and reviewing referrals that are still **In Progress**. If they have been successfully sent, then the status would state **Submitted**.

Advice Request

Note – Although these messages are available, please check with your Health Board to see if they are being used in your area.

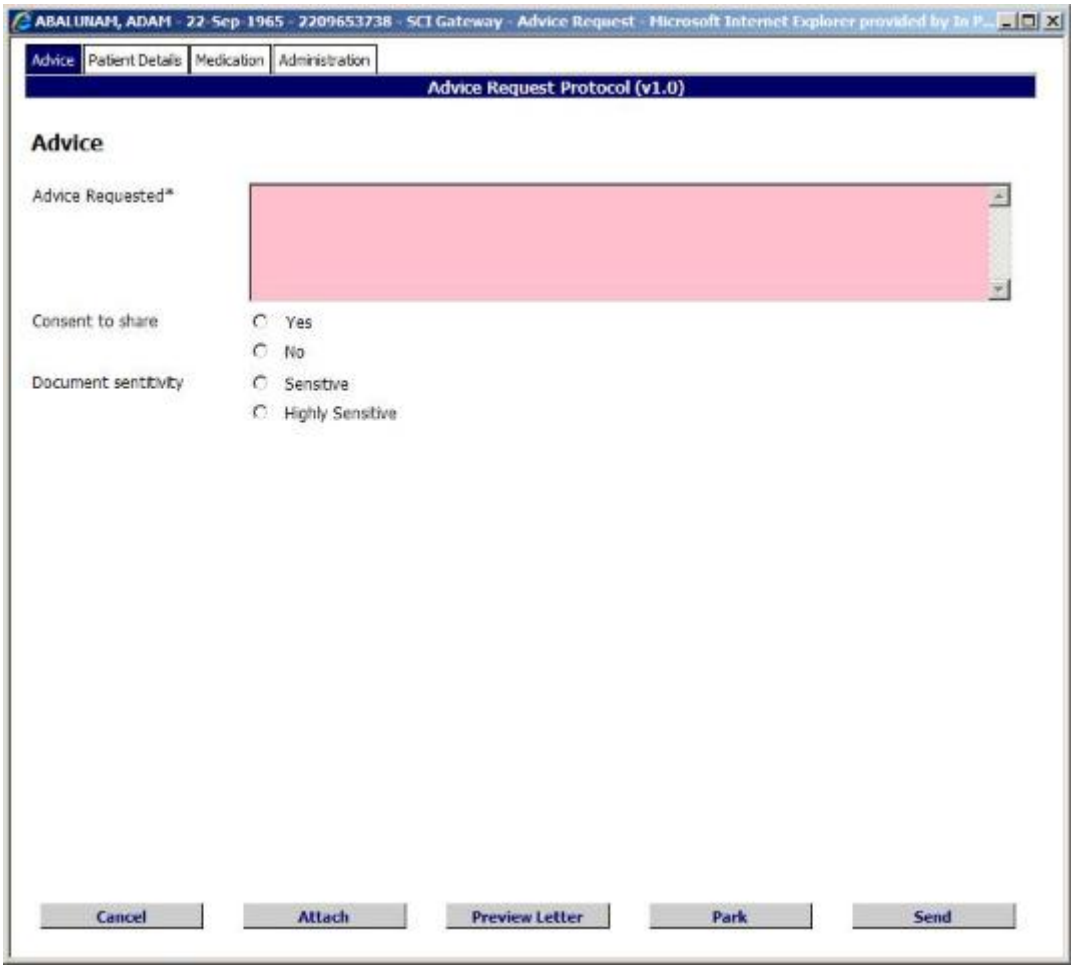
Advice Request enables you to send a message to a specific Hospital, Department or Consultant asking for advice on a specific patient, and record the query directly into the patient's record. The message includes:

- The free text request you enter.
- The full patient demographic details.
- A list of current and recent medication – The list can be edited if required.
- Details of the requesting GP and practice.

To send an Advice Request:

1. From Consultation Manager, with or without a patient selected click on **Summary – SCI Gateway**, **WCCG** or **CCG**.
2. From the Gateway menu, select **New Message** – **Advice Request**.
3. If you have not selected a patient within Consultation Manager, the Select Patient screen is displayed. Select the patient required in the usual way.
4. Complete the **Advice Requested** and check the **Patient Details**, **Medication** and **Administration** tabs have completed.

Note – Pink areas are mandatory.



Advice Request

5. Once the request is complete, click on **Send.**
6. Click on **Proceed**.
7. *A "Are you sure that you want to send the message now? If so please click on OK"* message is displayed, click **OK**.

Window Internet Explorer message

8. The request is now filed to the patient record. A confirmation is displayed stating *"Message filed into vision with no errors"*, Click **OK**.

Filing Result

9. The Advice Request is filed to the patient's record as an **Attachment** (see Viewing an Attachment on page 20 and Editing an Attachment within Vision for Identification Purposes on page 21).

Consultation Manager – Advice Request

> **Note** – If you are writing records back to Vision from your Gateway without first opening the patient and a Consultation, the records are recorded in a **Third Party** consultation.

Advice Response

> **Note** – Although these messages are available, please check with your Health Board to see if they are being used in your area.

In response to an Advice Request, a consultant can send an Advice Response. These are received by the Gateway, but can only be processed by you checking your messages.

> **Note** – It is good practice to check for messages in your Gateway daily. Messages are sent to the practice account so any member of staff that has Gateway rights can check and process all the messages.

Responses to Advice Requests can be written to the patient record via the Gateway. To access the responses through Vision:

1. From Consultation Manager, with or without a patient selected click on **Summary – SCI Gateway**, **WCCG** or **CCG**.
2. If you have selected a patient within Consultation Manager, any Responses for that patient are displayed within the Gateway screen.

   If you have not selected a patient within Consultation Manager, you can list all the Reponses from the Messages menu within the Gateway.
3. Double click on the item required, **Advice Response** is displayed.
4. Click **Import** to write back to the patient's record within Vision.
5. *A "The Advice Response has been successfully imported into Vision"* message is displayed.

Successful import message

6. Click on **OK**.
7. The Advice Response is filed to the patient's record as an **Attachment**.

Consultation Manager – Advice Response

Discharge Notification

> **Note** – Although these messages are available, please check with your Health Board to see if they are being used in your area.

When a patient is discharged from a hospital, the discharge notice can be sent to your Gateway. These are received by the Gateway, but can only be processed by you checking your messages.

> **Note** – It is good practice to check for messages in your Gateway daily. Messages are sent to the practice account so any member of staff that has Gateway rights can check and process all the messages.

Discharge Notification can be written to the patient record via the Gateway. To access the discharges through Vision:

1. From Consultation Manager, with or without a patient selected click on **Summary – SCI Gateway**, **WCCG** or **CCG**.
2. If you have selected a patient within Consultation Manager, any Discharge Notifications for that patient are displayed within the Gateway screen.

   If you have not selected a patient within Consultation Manager, you can list all the Discharge Notifications from the Messages menu within the Gateway screen.
3. Double click on the item required, the **Discharge Notification** is displayed.
4. Click **Import** to write back to the patient's record within Vision.
5. *A "The Discharge has been successfully imported into Vision"* message is displayed.

Successful import message

6. Click on **OK**.
7. The Discharge Notification is filed to the patient's record as an **Attachment**.

Consultation Manager – Discharge Notification

Supplementary Message

> **Note** – Although these messages are available, please check with your Health Board to see if they are being used in your area.

A Supplementary message is an additional message to one that has already been sent. A Supplementary message can be attached to either:

- Advice Request
- Referral

To send a Supplementary message:

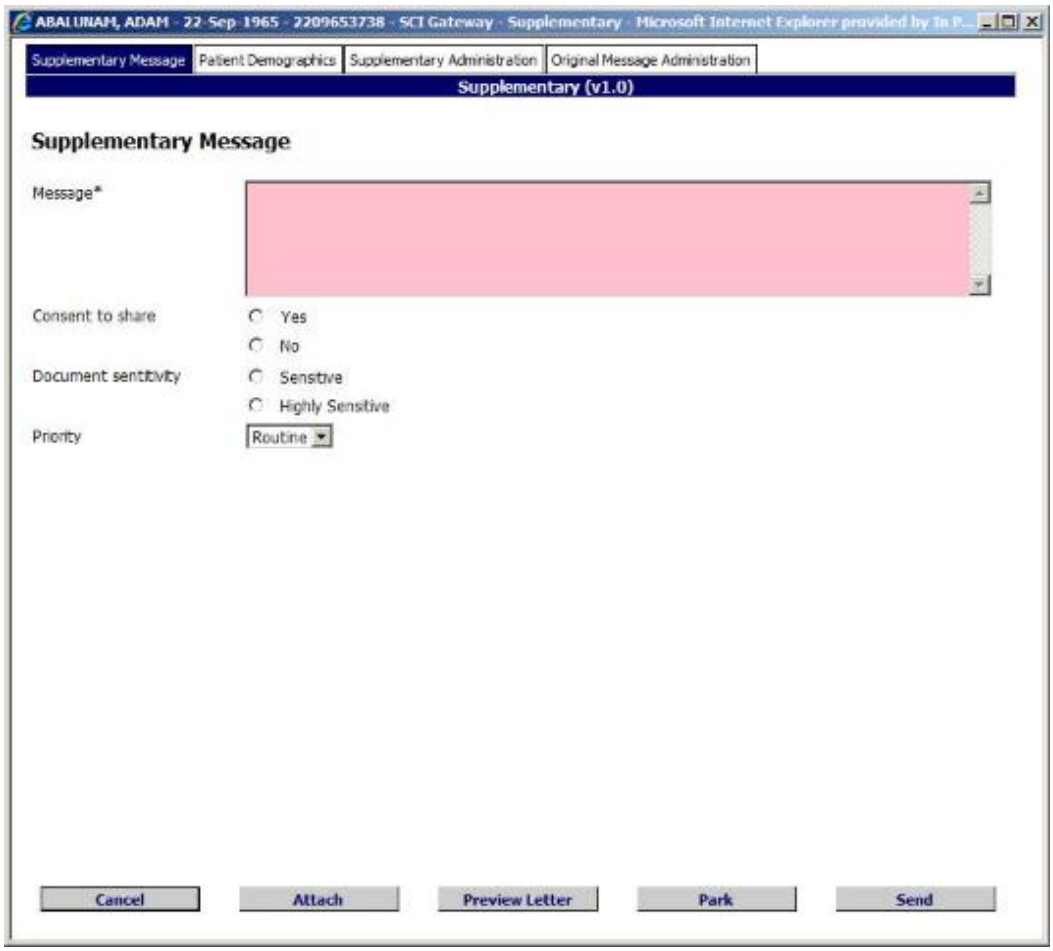
1. From Consultation Manager, with or without a patient selected click on **Summary –CCG**.
2. If you have selected a patient within Consultation Manager, any messages for that patient are displayed within the Gateway screen.

   If you have not selected a patient within Consultation Manager, you can list all the messages from the Messages menu.

3. Click on **Click here for options** to the left of the message concerned and select **Send Supplementary**.

CCG - Send Supplementary

4. Supplementary is displayed; type the additional information into **Message** as required.



Supplementary Message

5. Click on **Send**.
6. Click on **Proceed**.

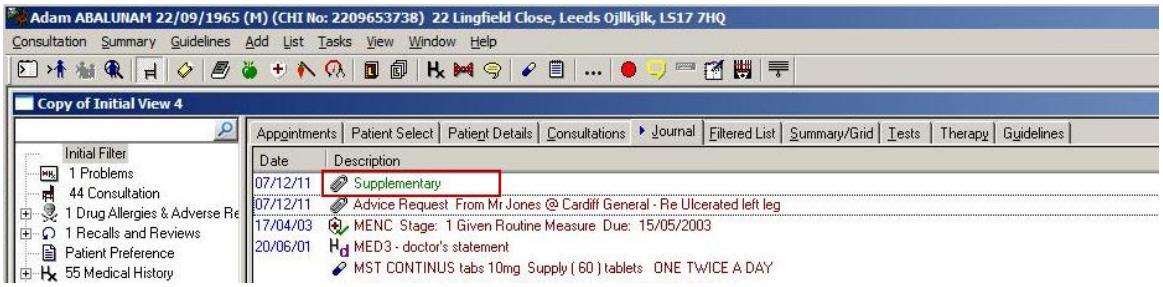
7. *A "Are you sure that you want to send the message now? If so please click OK"* message is displayed, click **OK**.

Window Internet Explorer message

8. The request is now filed to the patient record. A confirmation is displayed stating *"Message filed into vision with no errors"*, Click **OK**.

Filing Result

9. The Advice Request is filed to the patient's record as an **Attachment**.



Consultation Manager – Supplementary message

Viewing an Attachment in Consultation Manager

Supplementary messages are written back to Vision as Attachments. To view the messages from within Vision:

1. From **Consultation Manager**, select the patient with or without a consultation open.
2. Find the **Attachment** you require, right click and select **Item View**.

> **Remember** – You can click on **Miscellaneous** within the navigation pane to list all **Multimedia Attachments.**

3. **Attachments - Display** is displayed.

Attachment – Display

4. Click on **View** to display the **Attachment** submitted.

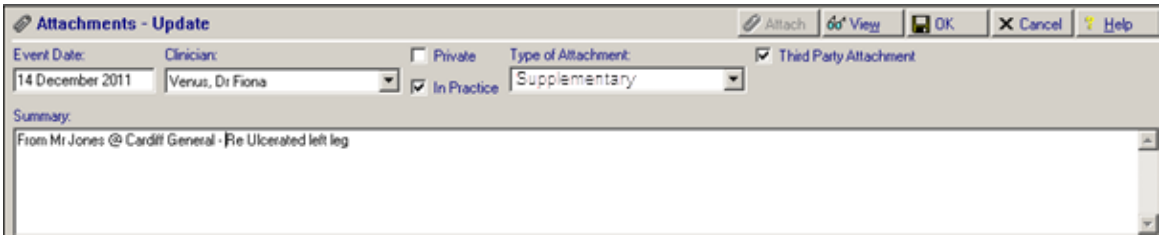
Editing an Attachment within Vision for Identification Purposes

Supplementary messages are written back to Vision as Attachments, and can therefore be tricky to identify especially on a patient with several requests. It is therefore recommended that you enter a summary to aid in the identification of the message:

1. From Consultation Manager, select the patient ensure a consultation is open.
2. Find the Attachment, right click and select **Edit**.

> **Remember** – You can click on **Miscellaneous** within the navigation pane to list all **Multimedia Attachments.**

3. **Attachments - Update** is displayed.
4. In **Summary**, type a summary of the item.



Attachment – Update with Summary

5. Click on **OK** to save and close.
6. The Attachment is now easily identifiable.

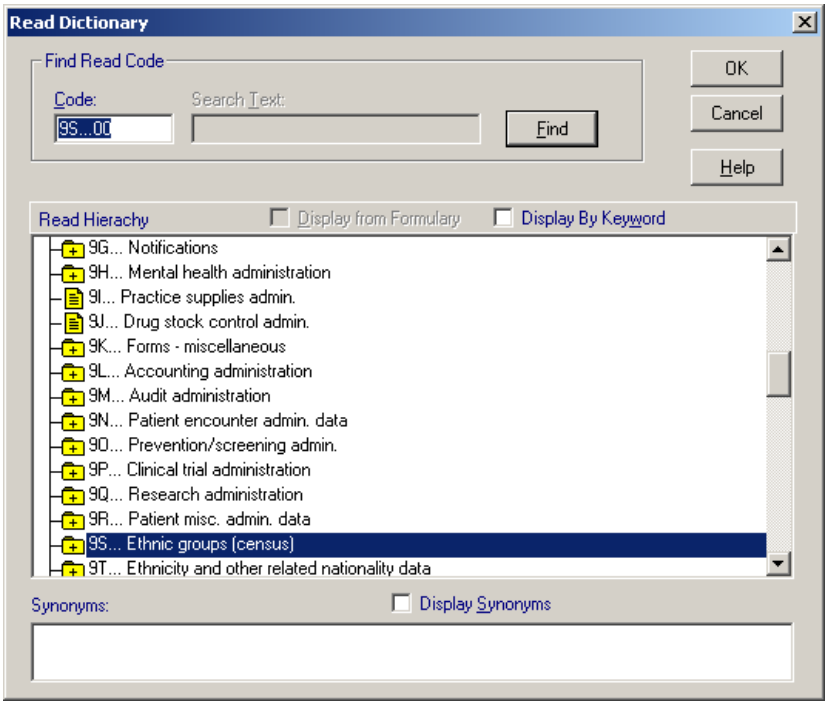
> **Note** – This is for within Vision only, it does not update the CCG record.

Additional Features

Ethnicity

The Ethnic Origin section of a Gateway Referral template is automatically completed from the information recorded in Vision. To utilise this facility you must use Read codes starting **9S...** when recording ethnicity within Vision. To add an ethnicity record to Vision:

1. From **Vision – Consultation Manager**, select the patient and open a consultation if one does not open automatically.
2. In Read Term – Add enter **#9S** and press enter.
3. Press **<F3>** to view the Read Dictionary.



Read Dictionary

4. Double click on next to **9S... Ethnic groups(census)**.
5. **9S... Ethnic groups(census)** is expanded, double click on the ethnicity required for your patient.
6. **Read Term – Add** is completed with the Read code and description selected, click on **OK**.
7. **History – Add** is displayed; enter any notes into **Comment** as required.
8. Click on **OK** to save and close.

The maximum number of characters in **Ethnic Origin** is 70. If the ethnicity within Vision is longer than 70 characters, the description is truncated within the referral.

CCG Priority Mapping

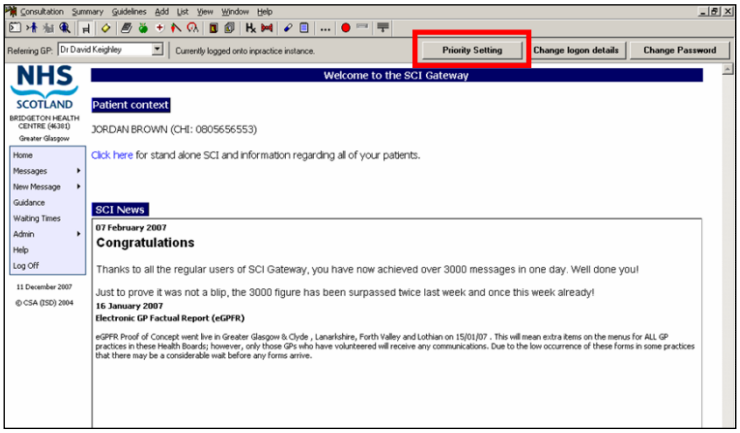
Medical Histories which are sent from the Patient Record as part of a CCG referral are mapped to CCG priorities according to the following table by default. If the priority box is left empty or a Structured Data Area (i.e. Blood Pressure) is used, the Vision priority is classed as Other and is mapped to medium in CCG by default.

Vision Medical History Priorities	CCG Priorities
0	Not sent
1	High
2	Medium
3	Medium
4	Medium
5	Medium
6	Medium
7	Medium
8	Medium
9	Medium
Other	Medium

Changing default priority mapping

As every practice can use priorities in a different way, you are able to change the way that individual Vision priorities are mapped to CCG priorities. This done from the CCG referral screen and is a **practice wide setting** which can be amended by a **clinical** Vision user.

1. From Consultation Manager, login to CCG from **Summary – CCG**.

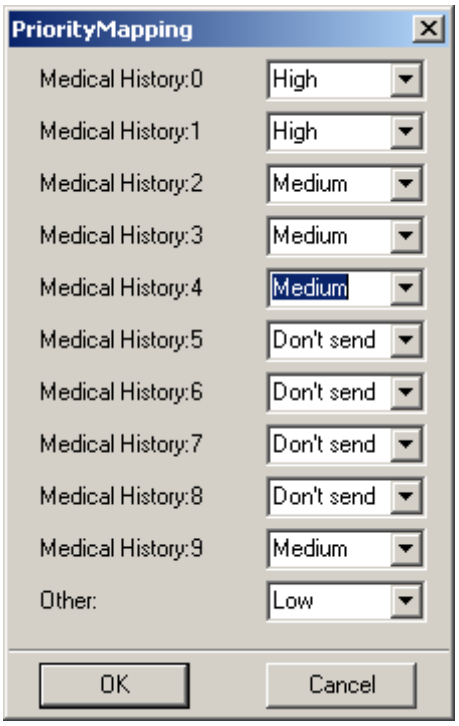


CCG Welcome page, Priority Setting highlighted

2. Click on **Priority Setting**.

Available options, Priority Setting highlighted

3. Select the CCG priority that you want to map each Medical History priority to. For each Vision priority and items with no priority, you can select a corresponding CCG Priority (low, medium or high) from the drop down boxes. You can also opt to not send any information by selecting Don't Send. Medical Histories with no priority or SDA entries can also be mapped for CCG purposes.



Priority Mapping screen

4. Click **OK** to save the settings. These settings are saved on a practice wide basis.

Note - If your role within Vision is not clinical, you are not able to change the priority mapping settings.

Troubleshooting

The sections below detail how to troubleshoot some known issues with CCG that some practices have been experiencing intermittently.

CCG error messages are normally displayed at the bottom of the CCG Referral Form. Other errors may appear as Vision dialog.

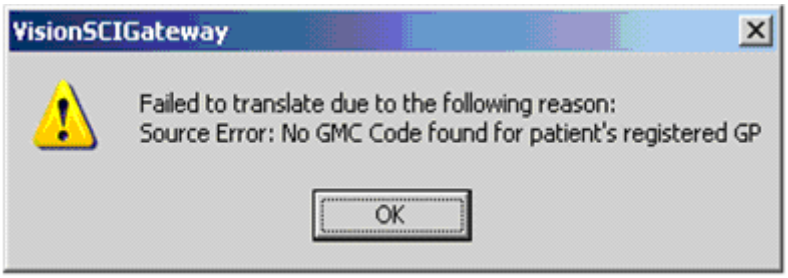
The patient context could not be set

Patient context could not be set message

This is a general error message, if you see this error on the referral web form, please contact the INPS Helpline.

> **Note** - If the error "***The patient context could not be set"*** was due to Vision data failing schema validation, then a Vision error dialog is initially displayed.

Source Error - No GMC Code found for patient's registered GP

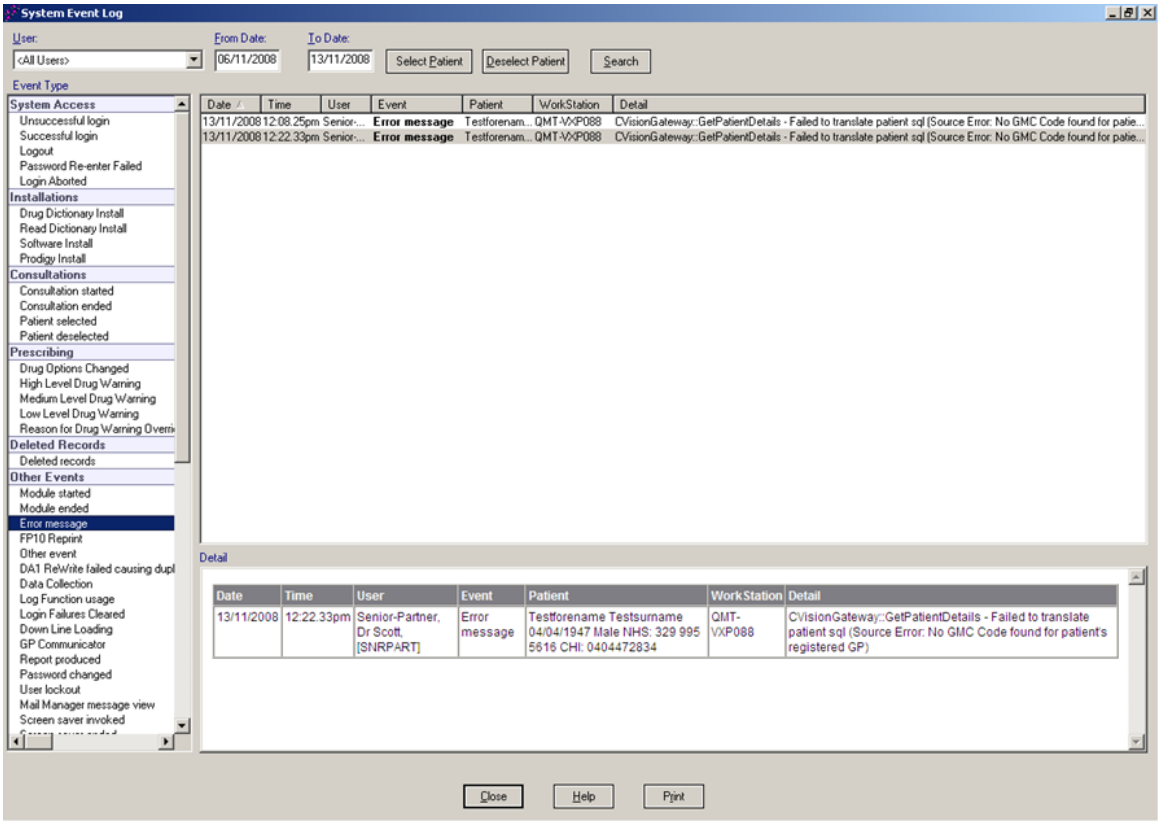


VisionSCIGateway No GMC Code error

Check that the patient's registered GP has a GMC code set up:

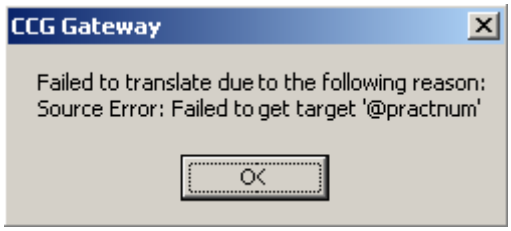
> **Note** – You may have to be logged in as a System Administrator depending on your practice settings.

1. From Vision front menu, **Management Tools - Control Panel - File Maintenance - Staff**.
2. Right click on the GP concerned, and select **Edit Staff**.
3. Click on the **Identifiers** tab.
4. Click **Add** and select **GMC Code** from the **Identifier Type** list.
5. Type the correct code into **Identifier Value**.
6. Click **OK** and then **OK** again to save and close.



System Event Log showing No GMC Code found error

Failed to get target @ practnum



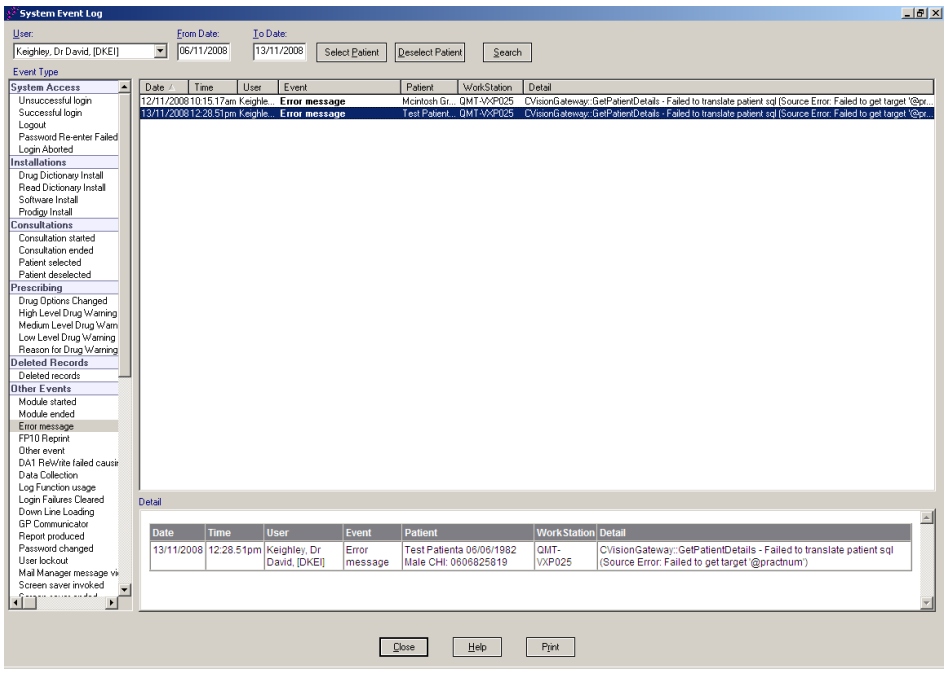
CCG Gateway Failed to get target error

This error occurs when the practice number has not been set.

> **Note** – You may have to be logged in as a System Administrator depending on your practice settings.

1. From Vision front menu, **Management Tools - Control Panel - File Maintenance – Practice**.
2. Right click on the practice name, and select **Edit Practice**.
3. Enter your practice National Identifier.
4. Click **OK** to save and close.

If you are unable to identify and rectify the error, then contact the Vision Helpline.



System Event Log showing Failed to get target error

The patient details could not be validated. No Patient information has been received.

Contact the INPS Helpline if this error message is displayed on the patient web form.

Incomplete Date Format

Vision allows historical data to be recorded using an incomplete date format, i.e. a history entry may have an event date of 1999 or 02/1999. CCG requires that all information that is included in a CCG Referral must have a date format of dd/mm/yyyy. Vision can annotate any entries with an incomplete date format with 01. Below is listed how various partial date scenarios are resolved.

CCG partial dates scenarios

1. **Record has no Event Date**

   Date in Vision: Not Known

   Date passed to CCG: 01/01/1900

   Comment passed to CCG: "[DATE of EVENT UNKNOWN] *free text comment up to the length limit of 198 characters"*
2. **Event Date is Year only**

   Date in Vision: 1994

   Date passed to CCG: 01/01/1994

   Comment passed to CCG*: "[YEAR OF EVENT 1994] free text comment up to length limit of 198 characters"*
3. **Event Date is Month and Year only**

   Date in Vision: 02/1999

   Date passed to CCG: 01/02/1999

   Comment passed to CCG: *"[MONTH AND YEAR OF EVENT 02/1999] free text comment up to length limit of 198 characters"*
4. **Comments field exceeds CCG length limit (but valid date supplied)**

   Date in Vision: 17/08/2003

   Date passed to CCG: 17/08/2003

   Comment Passed to CCG: *"[TRUNCATED] free text comments up to length limit of 198 characters"*
5. **Partial Date AND Comments field exceeds CCG length limit**

   Date in Vision: 02/1987

   Date passed to CCG: 01/02/1987

   Comment passed to CCG: "[TRUNCATED][MONTH AND YEAR OF EVENT 02/1987] free text comments up to length limit of 198 characters"

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