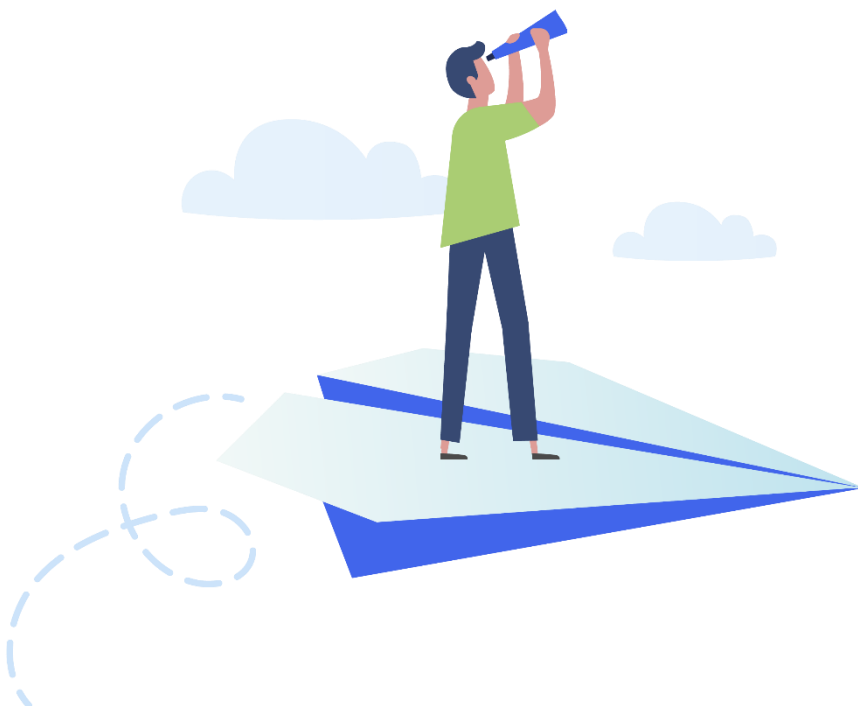




Chronic Kidney Disease Manager User Guide

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Overview

The current National Institute for Health and Care Excellence (NICE) guidelines for managing Chronic Kidney Disease (CKD) in general practice can be quite laborious with practices required to identify and manage patients with CKD as well as audit the early identification and management of patients with the disease.

CKD Manager enables you to improve register accuracy, optimise patient treatment to reduce the chance of further renal decline and manage patients appropriately. Through the use of **CKD Manager**, this process will be exact as well as efficient for both you and your patients.

CKD Manager consists of the following tools:

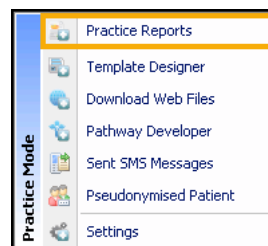
- **Comprehensive CKD Reports**
- **CKD Management Template**
- **CKD Alerts**

Running the CKD Manager Reports

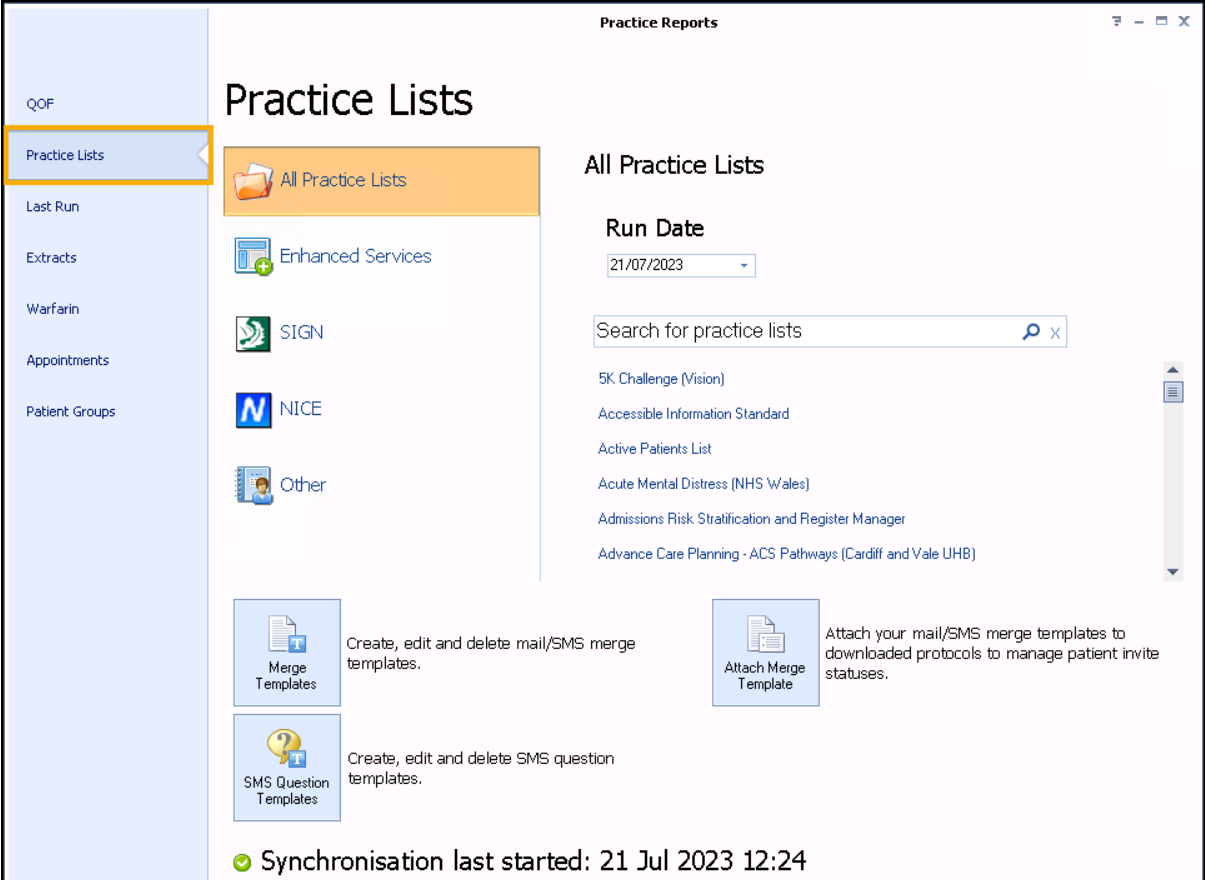
The **CKD Manager Practice Reports** look at the accuracy of your existing CKD register as well as identifying patients requiring a review and management appropriately.

The first step to identifying and managing your CKD patients, is to run the CKD reports. This section explains how to do this:

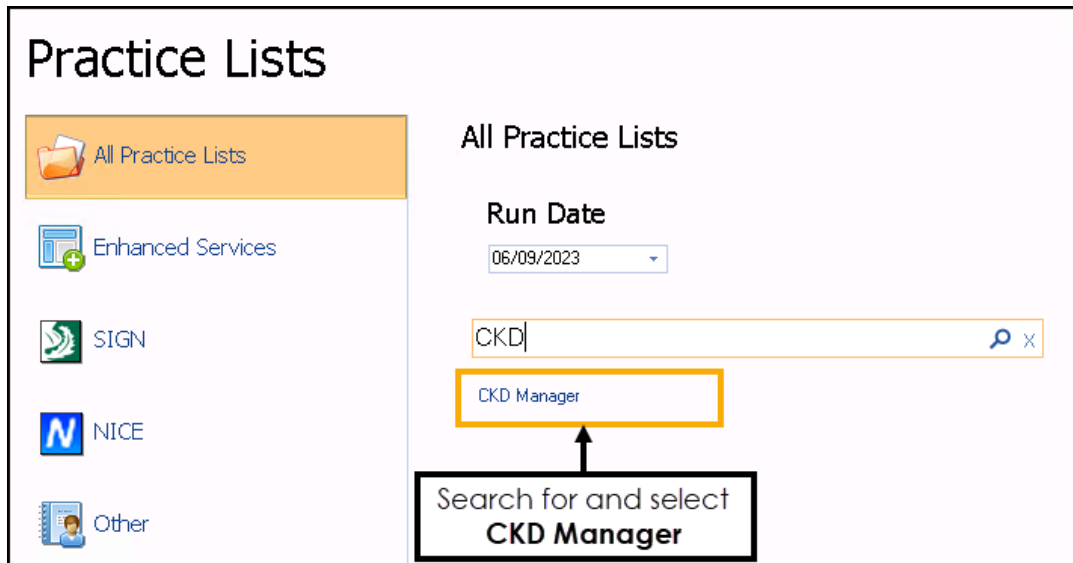
1. Log into **Vision 3**.
2. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:



3. From the **Practice Reports** menu, select **Practice Lists**:

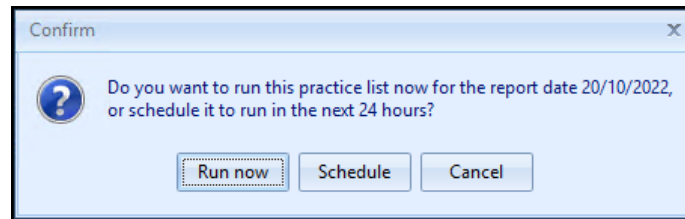


4. Select **CKD Manager**:



The screenshot displays the 'Practice Lists' interface. On the left, a sidebar lists categories: 'All Practice Lists' (highlighted), 'Enhanced Services', 'SIGN', 'NICE', and 'Other'. The main area is titled 'All Practice Lists' and features a 'Run Date' dropdown set to '06/09/2023'. A search bar contains the text 'CKD|' and a magnifying glass icon. Below the search bar, a search result 'CKD Manager' is highlighted with an orange box. A black box with white text and an arrow points to this result, containing the instruction: 'Search for and select CKD Manager'.

5. A message displays stating 'Do you want to run this practice list now, or schedule it to run in the next 24 hours?':



Select from:

- **Run Now** - To run the report. The report screen displays with a progress bar.

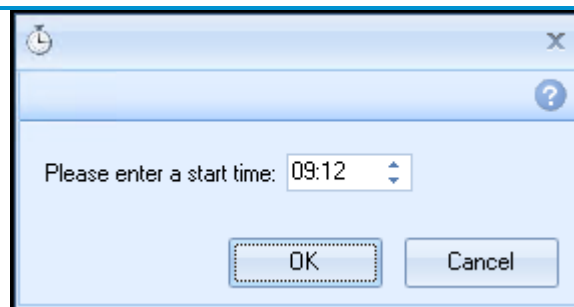


Training Tip - To run a report for call and recall invite purposes you must select **Run Now**.

- **Schedule** - To schedule the report in the next 24 hours, the **Schedule** screen displays, enter a start time in the next 24 hours to run the report:



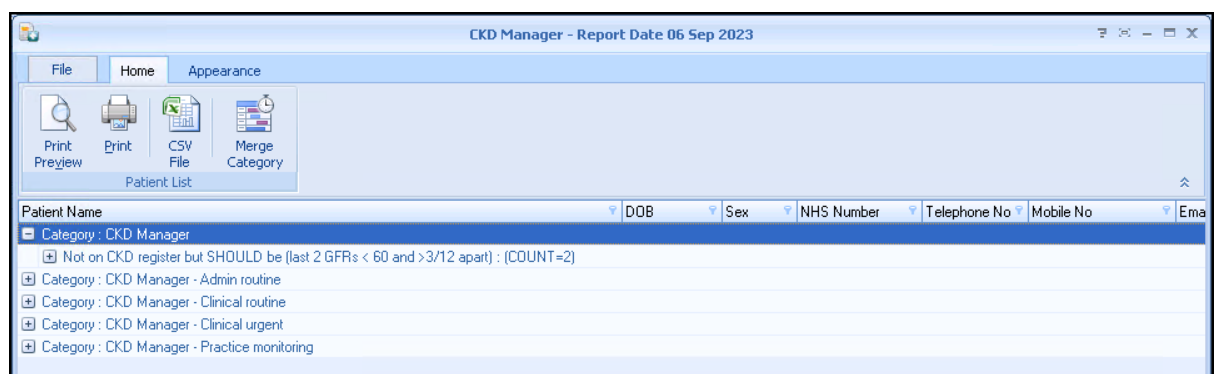
Training Tip - This must be set using the 24 hour clock, for example, for 4pm use 16:00.



You can now continue working as usual and the report runs as per your schedule. Once a report is run as scheduled it displays in the **Practice Reports - Last Run** screen.

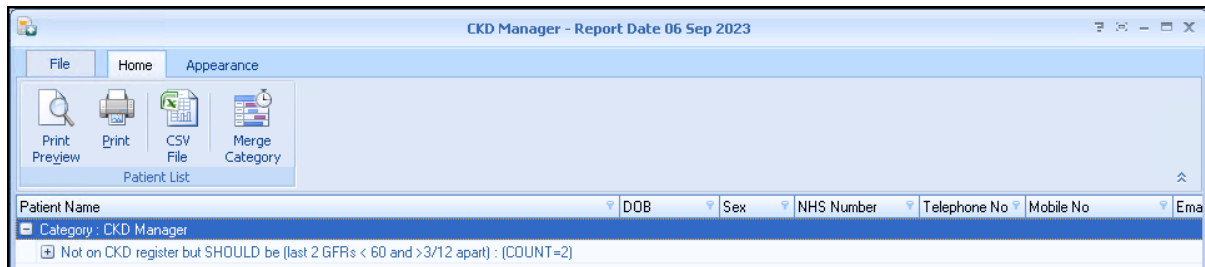
- **Cancel** - To exit the confirmation screen.

6. Once the reports have run, the **CKD Manager** reports display:



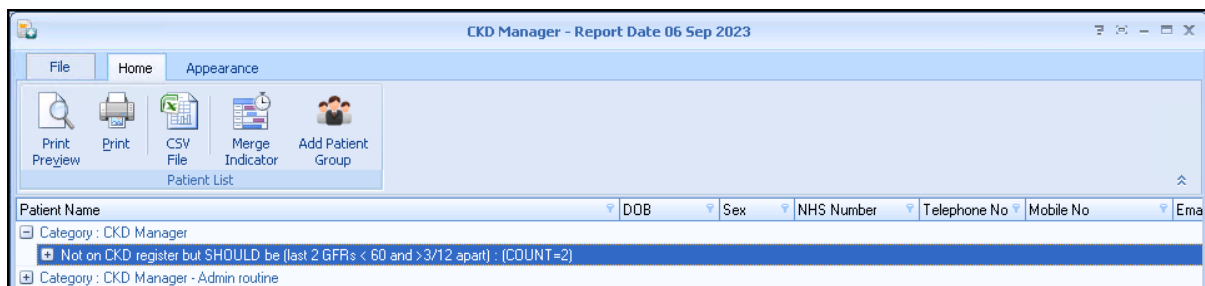
Depending on your selection, you have the following options:

Category



- **Print Preview** - Select to preview the current report view.
- **Print** - Select to print the current report view.
- **CSV File** - Select to export to a CSV file.
- **Merge Category** - Select to merge the category, see [Running a Mail Merge from Patient Target Lists](#) in the **Vision+ Help Centre** for details.

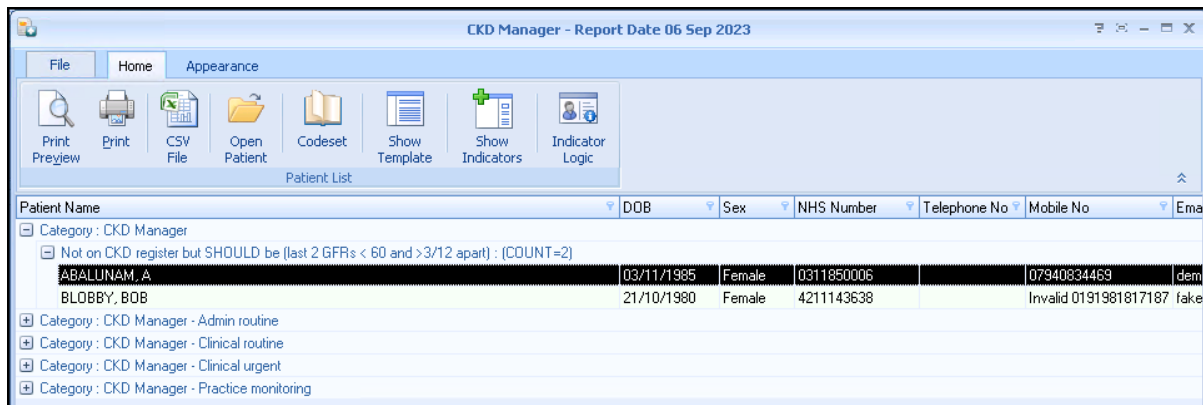
Indicator



Displays within a **Category**:

- **Print Preview** - Select to preview the current report view.
- **Print** - Select to print the current report view.
- **CSV File** - Select to export to a CSV file.
- **Merge Indicator** - Select to merge the indicator group, see [Running a Mail Merge from Patient Target Lists](#) in the **Vision+ Help Centre** for details.
- **Add Patient Group** - Select to save the list of patients as a group in **Reporting - Patient Groups**, see [Saving a List of Patients as a Patient Group](#) in the **Vision+ Help Centre** for details.

Individual Patient



Displays within **Category - Indicator**:

- **Print Preview** - Select to preview the current report view.
- **Print** - Select to print the current report view.
- **CSV File** - Select to export to a CSV file.
- **Open Patient** - Select to open the highlighted patient in **Consultation Manager**.
- **Codeset** - Select to add an appropriate clinical term directly into the patient's record.
- **Show Template** - Select to launch the **CKD Manager** template for the patient without having to open **Consultation Manager**. See [Managing your Patients using the CKD Manager Template](#) on page 18 for details.
- **Show Indicators** - Select to launch the patient's alert pop-up window without having to open **Consultation Manager**.
- **Indicator Logic** - Select to see why the patient is on the cohort list, this opens the pathway in **Pathway Developer**.

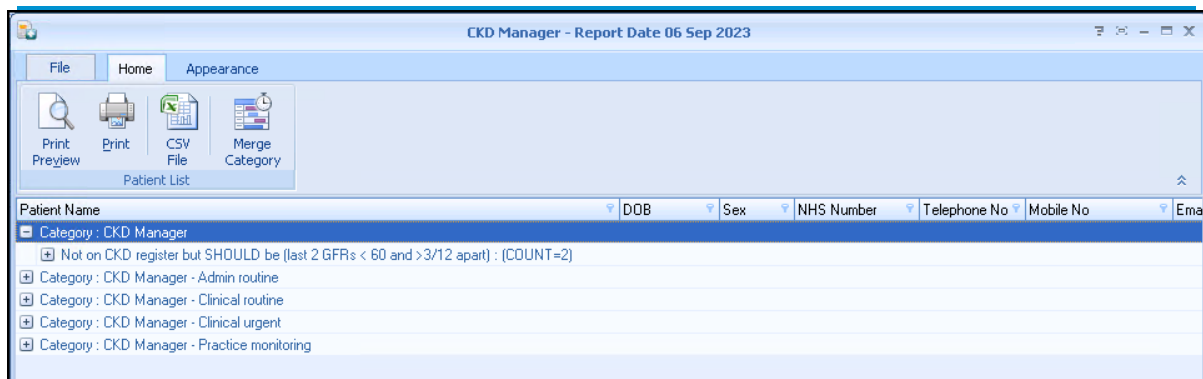


For more information on how to work with the reports, see [Working with Data within the Patient Target Lists](#) in the **Vision+ Help Centre**.

Reviewing CKD Manager Reports

This area of the guide details the different report categories and highlights some key points to consider when reviewing the results. The reports have been grouped into categories, making it easier to identify specific cohorts of patients. After identifying the patients you can easily work on aggregates of patients, see [Working with Data within the Patient Target Lists](#) in the **Vision+ Help Centre**.

 **Note** - As each practice may have different reporting requirements, this guide does not give details of all of the **CKD Manager** reports. However, it does highlight key points.



- **CKD Manager** - The **CKD Manager** category contains a group of reports that are not assigned to a sub-category. This is so that it is easier to see the overall performance of your CKD Register. See [CKD Manager](#) on page 11.
- **CKD Manager Clinical Urgent** - This collection of report lines are categorised under **Clinical Urgent** so that they can be viewed by clinicians who are familiar with managing both acute and chronic kidney disease. See [CKD Manager Clinical Urgent](#) on page 12.
- **CKD Manager Admin Urgent** - Reports listed under the **Admin Urgent** category can be delegated to non-clinical staff that can assist in recalling the patients. See [CKD Manager Admin Urgent](#) on page 12.
- **CKD Manager Clinical Routine** - The **CKD Manager Clinical Routine** reports are for clinicians to review but do not require urgent attention. See [CKD Manager Clinical Routine](#) on page 12.
- **CKD Manager Admin Routine** - Reports listed under **Admin Routine** can be delegated to non-clinicians for processing. They do not require urgent attention. See [CKD Manager Admin Routine](#) on page 13.
- **CKD Manager Practice Monitoring** - The **Practice Monitoring** reports help you audit your practice prevalence and review Glomerular Filtration Rate (GFR) levels. See [CKD Manager Practice Monitoring](#) on page 13.

CKD Manager

CKD Manager reports are designed to assist in assessing the accuracy of your CKD register.



Note - Some report lines only display if you have patients who meet the relevant criteria.

Key Points

- **CKD Manager Reports not grouped into a sub category** - The report lines that list at the top under the category **CKD Manager** display here to make it easier to see the overall performance of your CKD Register.
- **Currently on CKD Register** - This report looks for all patients whose most recent clinical term recorded is CKD Stage 3 (or above). This information is for reference purposes only and can be used to compare with your QOF/QAIF CKD Register.
- **On CKD Register and has correct stage** - This report is very precise, for example, excludes CKD Stage 3 if the patient is CKD stage 3a with Proteinuria.
- **On CKD register but most recent CKD Stage is not accurate** - This report identifies patients who are correctly on the CKD Register but do not have the most precise CKD stage clinical term assigned, for example CKD Stage 3a.
- **Not on CKD Register but should be** - This report line displays patients who meet the diagnostic criteria for a specific CKD Stage but who have no CKD Stage 3 (or above) clinical term assigned in their records. Each patient's record can be reviewed.
- **On CKD register but should not be** - This report line shows all patients with a clinical term CKD Stage 3 (or above) as the most recent recorded entry, but who have an estimated Glomerular Filtration Rate (eGFR) greater than '59' on the last two occasions.
- **ACEi/ARB indicated** - This report specifically identifies patients who meet the NICE clinical guidance for Angiotensin-Converting Enzyme Inhibitors (ACEi)/Angiotensin Receptor Blockers (ARBs) indications in CKD. This is important as prescribing ACEi/ARB indications for these patients can reduce the rate of renal decline.
- **First GFR < 60 - should retest 1-2/52 - This is Overdue?** - This report identifies patients to potentially add to the CKD register when retested.
- **Retest ACR - most recent result is elevated - CKD Manager** requires two elevated Albumin-to-creatinine ratios (ACRs) before it advises on ACEi/ARB indicators, as per the NICE guidance.



Training Tip - For more information on working with reports, see [Working with Data within the Patient Target Lists](#) or [Running a Mail Merge from Patient Target Lists](#) in the **Vision+ Help Centre** for details.

CKD Manager Clinical Urgent

The **CKD Manager Clinical Urgent** category lists cohorts of patients that may require clinical intervention to help prevent or treat kidney disease. The reports are categorised so that you can quickly see the type of CKD problem areas you may wish to monitor.



Note - Some report lines only display if you have patients who meet the relevant criteria.

Key Points

- **Large Rise in Creatinine** - This report identifies any patients where the most recent recorded creatinine is greater than '90'.



Training Tip - To view specific information for each patient, highlight the



patient and select **Show Indicators** on the toolbar.

CKD Manager Admin Urgent

The **CKD Manager Admin Urgent** category displays reports that help identify patients who require a review. The reports are arranged so that recalling the patient can be initiated by non-clinical staff members. See [Running a Mail Merge from Patient Target Lists](#) in the **Vision+ Help Centre** for details



Note - Some report lines only display if you have patients who meet the relevant criteria.

CKD Manager Clinical Routine


The **CKD Manager Clinical Routine** category displays cohorts of patient's whose clinical record may require a review. The reporting lines contain information such as CKD Read coding suggestions and patients whose blood pressure is not to target.



Note - Some report lines only display if you have patients who meet the relevant criteria.


CKD Manager Admin Routine

The **CKD Manager Admin Routine** category displays reports to help you manage CKD patients.

 **Note** - Some report lines only display if you have patients who meet the relevant criteria.

CKD Manager Practice Monitoring

The **CKD Manager Practice Monitoring** reports help you analyse your practice prevalence and review GFR levels.

 **Note** - Some report lines only display if you have patients who meet the relevant criteria.

Accessing the CKD Manager Template

The **CKD Manager** Template is designed to help you manage your CKD patients. It contains all the relevant information for proactive case management of your patients and helps standardise data recording for improved reporting.

There are three ways to access the **CKD Manager** Template:

- **Practice Reports** - Access the **CKD Manager** Template from **Vision+ Practice Reports**.

 See [Selecting the CKD Manager Template from Practice Reports](#) on page **15** for details.

- **Clinical Templates** - Access the **CKD Manager** Template from Clinical Templates in **Consultation Manager**.

 See [Selecting the CKD Manager Template in Consultation Manager](#) on page **16** for details.

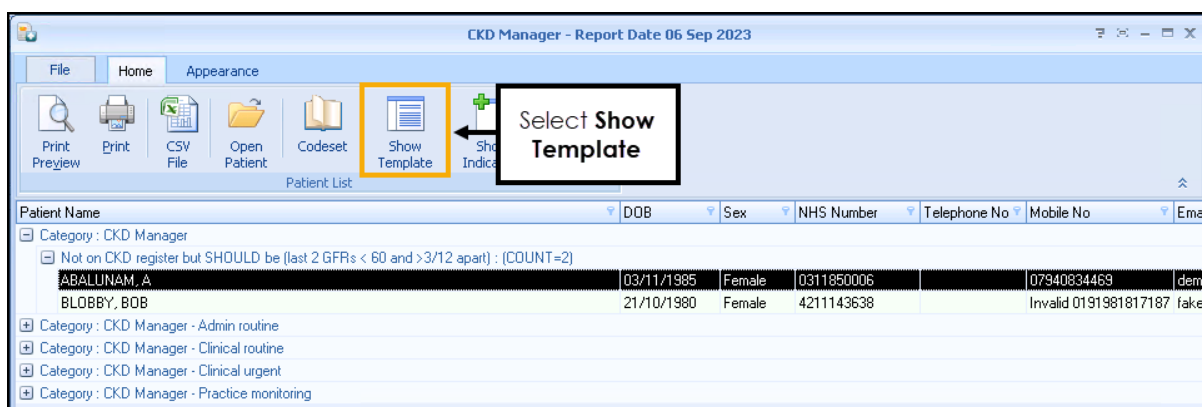
- **Alert Pop-up window** - Use the Alert screen to open the CKD Manager Template.

 See [Accessing the CKD Manager Template from the Alert Pop-up Window](#) on page **17** for details.

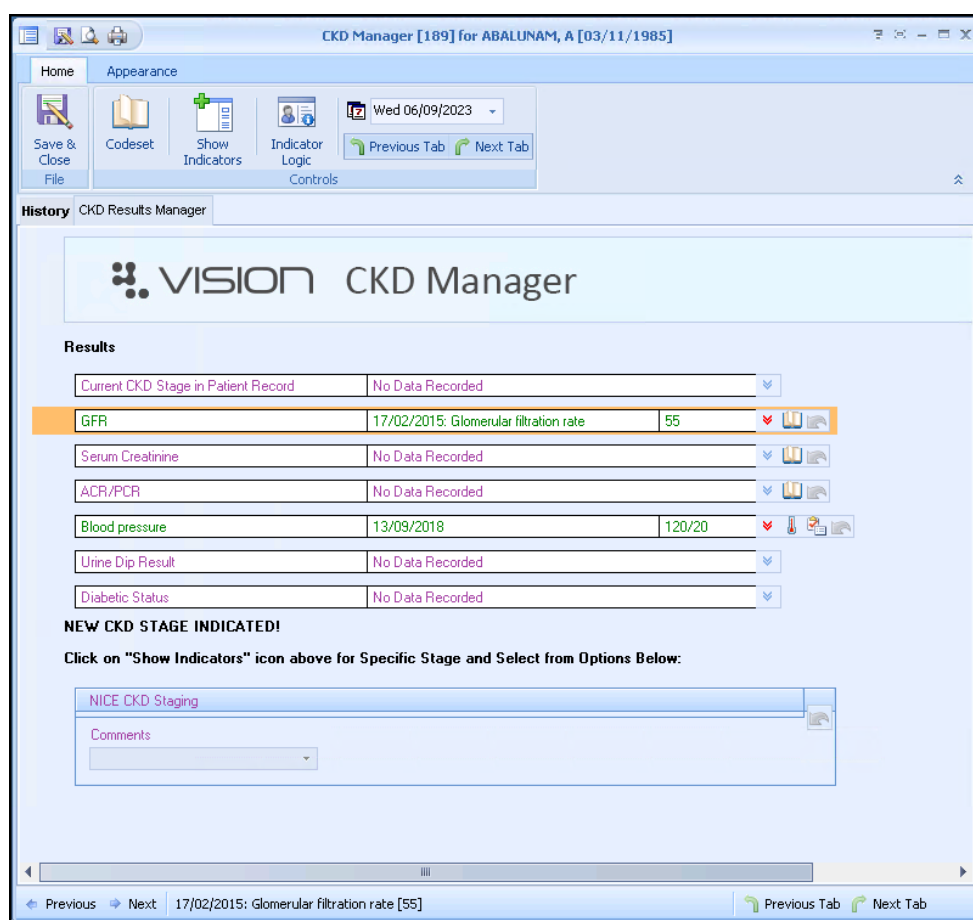
Selecting the CKD Manager Template from Practice Reports

To access the **CKD Manager** Template from **Vision+ Practice Reports**:

1. Run the **CKD Manager Practice Report**, see [Running the CKD Manager Reports](#) on page 5 for details.
2. Highlight the patient and select **Show Template**:




The **CKD Manager** Template displays:

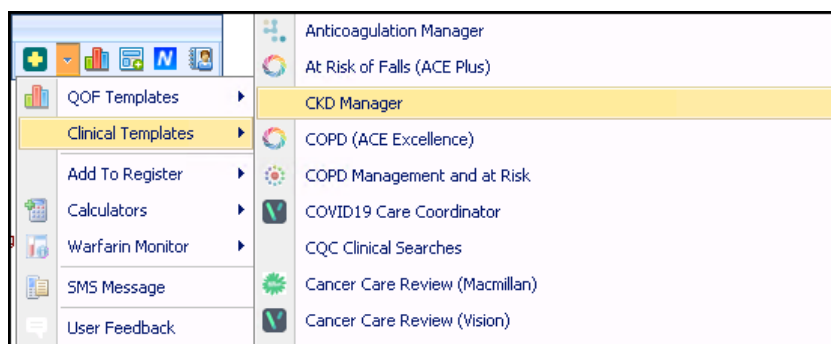


➔ For information on recording data on the **CKD Manager** Template, see [Managing your Patients using the CKD Manager Template](#) on page 18.

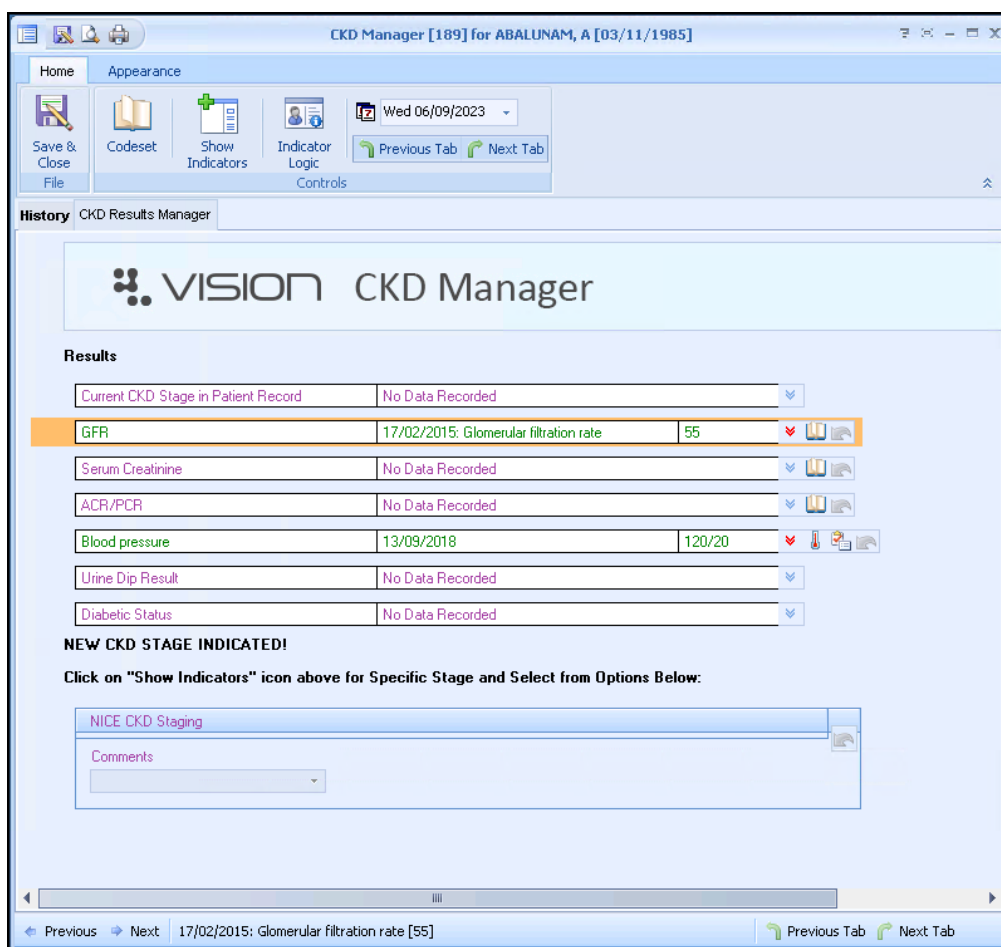
Selecting the CKD Manager Template in Consultation Manager

To select the **CKD Manager** Template in **Consultation Manager**:

1. From **Consultation Manager**, select the patient required.
2. Select **Clinical Templates** from the **Vision+** drop-down  on the floating toolbar and then select **CKD Manager**:



The **CKD Manager** Template displays:




For information on recording data to the **CKD Manager** Template, see [Managing your Patients using the CKD Manager Template](#) on page 18.

Accessing the CKD Manager Template from the Alert Pop-up Window

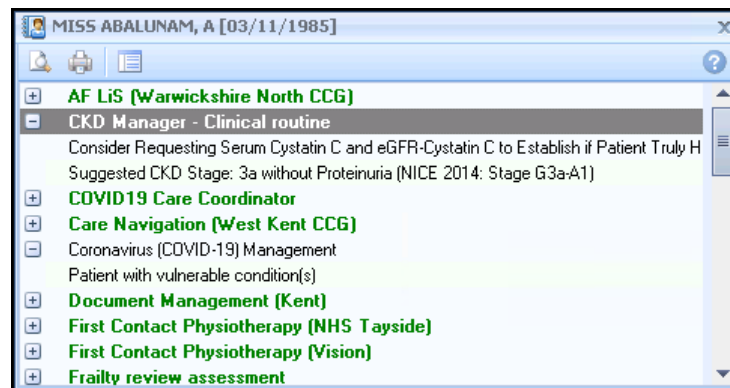
To launch the template from the **Alert** screen:

1. Select a patient in **Consultation Manager**.
2. Select **Show Other Indicators**  on the **Vision+ floating** toolbar





 **Note** - By default QOF alerts display when you select a patient in **Consultation Manager**. To combine both QOF and non-QOF alerts, see [Options - Indicators](#) in the **Vision+ Help Centre**.

3. The **Alert** screen displays the **CKD Manager** sub category headings expanded to show relevant data:



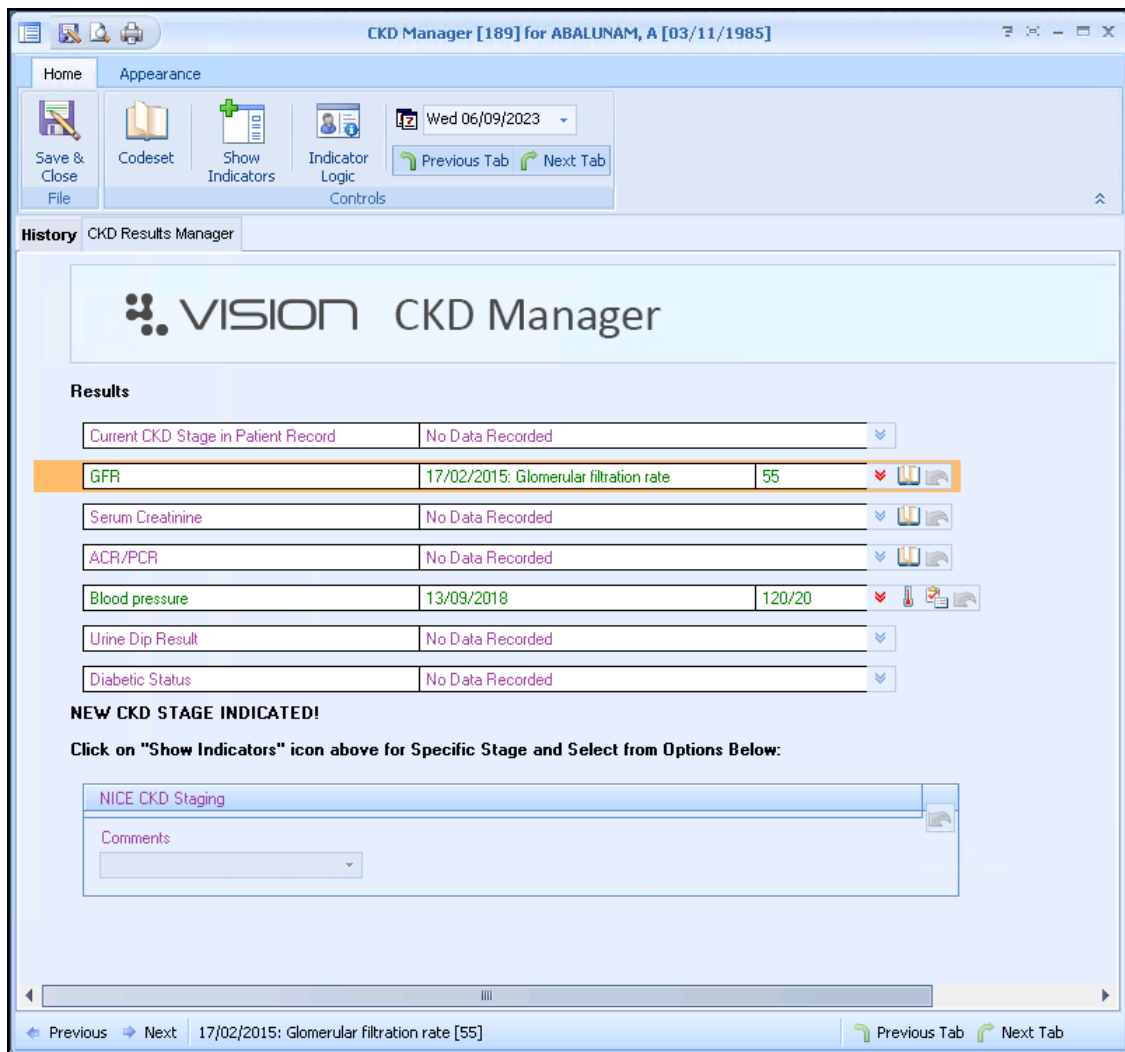
To launch the **CKD Manager Clinical Template** either:

- Right click on the **CKD Manager** category and select **Show Template** ,
- Highlight the **CKD Manager** category and select **Template** , or,
- Double click one of the expanded lines below the **CKD Manager** category heading.

 For information on recording data to the **CKD Manager** Template, see [Managing your Patients using the CKD Manager Template](#) on page **18**.

Managing your Patients using the CKD Manager Template

The **CKD Manager** template is a simple to use screen that is designed to provide pertinent clinical information at a glance. It is interactive and only allows you to add information that is relevant to the patient. Using the data entry tools, you can view historical data or add new data. You can also display numerical information as a graph:



The template is split into two tabs:

- **History** - Displays clinical information from the patient's record.



See [Viewing the History Tab](#) in the **Vision+ Help Centre** for details.

- **CKD Results Manager** - The main template tab, complete as required.



See [Using Templates](#) in the **Vision+ Help Centre** for details.

Select **Save & Close**  to save the data to the patient's record.

Key Points

- **Results** - The **Results** section displays the patient's latest test results and investigations. This information automatically populates from the clinical system.
- **NICE CKD Staging** - The **NICE CKD Staging** section allows you to quickly add a clinical term for the patient's CKD stage. The clinical terms are only available if the patient's CKD stage requires changing or if you are placing a newly diagnosed patient on the CKD register.