Patient Services Configuration User Guide

Version 2.1
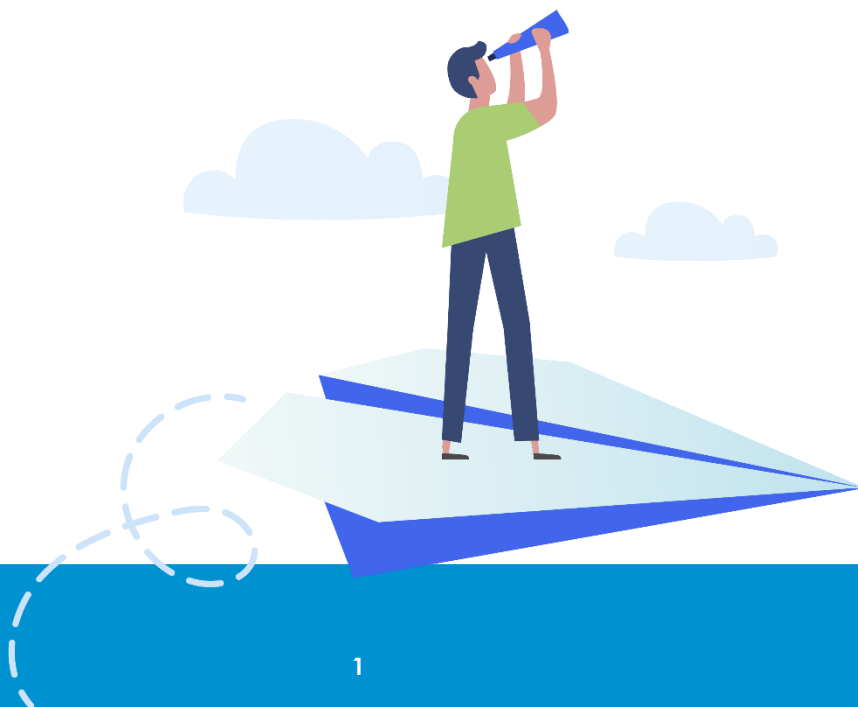
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Healthcare Solutions

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Patient Services - Configuration User Guide

Introduction

Patient Services is a website that enables patients in England, Scotland and Northern Ireland to request services from their GP practice online, at a time that is convenient to them.

Current online services are:

- **Appointments** - Enables patients to view, book, or cancel appointments with their doctor/nurse, see **Configuring Online Appointments** on page **9** for details.

- **Medication** - Enables patients to request their medication. The message is sent to the practice to action, the patient then collects the prescription as per the practice protocol, see **Enabling Online Prescriptions** on page **35** for details.

- **Messaging** - Enables you to both send and receive messages to and from your patients, without having to leave **Vision 3**, see **Enabling Online Patient Messaging** on page **39** for details.

- **Summary Data** - Enables patients to view their recorded allergy, prescription history and given immunisations, see **Enabling Online Patient Summary** on page **40** for details.

- **Detailed Coded Record (DCR)** - This enables patients to see detailed coded information such as diagnosis, examination findings such as blood pressure, procedures and investigations. What displays depends on settings within the GP practice, see **Enabling Online Detailed Coded Record Access** on page **46** for details.

- **Demographics** - Enables patients to view and/or update certain aspects of their demographic information, see **Enabling Online Demographic Access** on page **47** for details.

- **Pharmacy Nomination** - Enables your patients to view their preferred pharmacy and in England they can also see and update their **Electronic Prescription Services (EPS) Nominated Pharmacy**, see **Enabling Pharmacy Nomination** on page **49** for details.
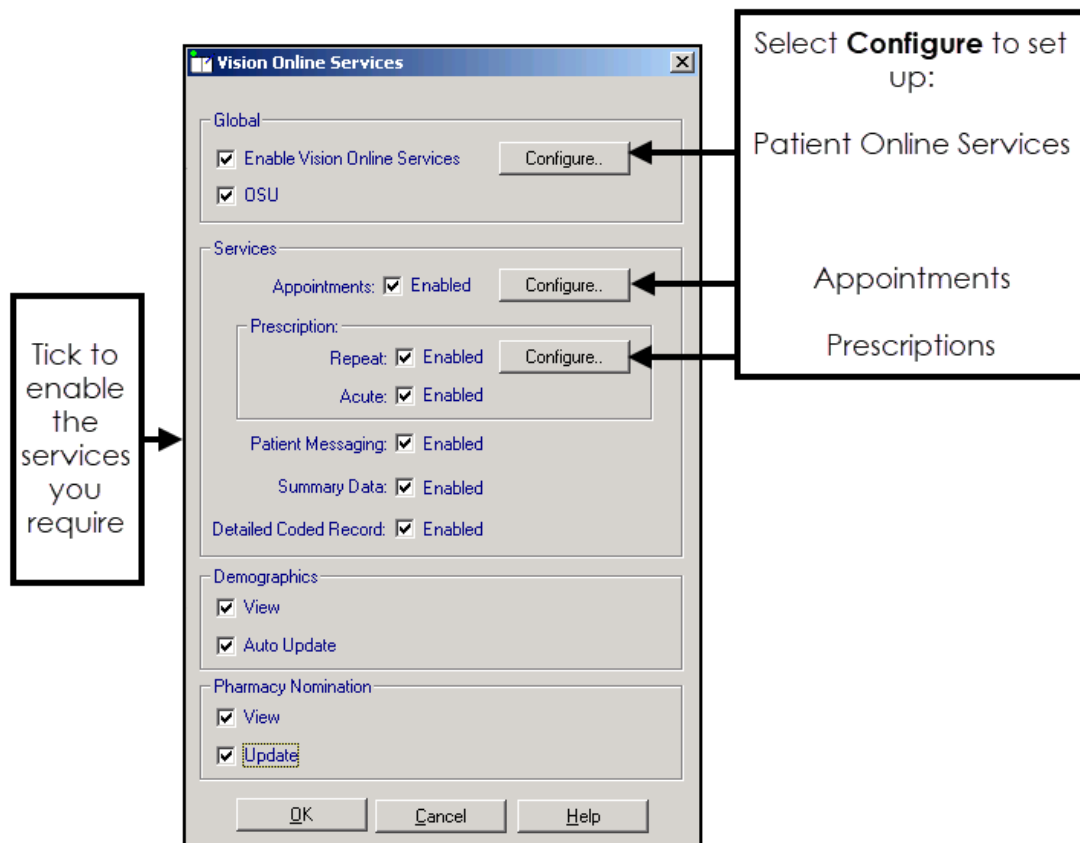
This guide explains how to set up and configure online services within **Vision 3** - **Control Panel** ready for your patients to access the services you choose to enable.

Enabling Patient Online Services

To enable patient online services:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online** and the **Vision Online Services** screen displays:

2. Tick **Enable Vision Online Services** to enable patient online services.
3. You now need to configure your global settings:

Setting your Global Configuration

Within **Global**, select **Configure** .

The following three global tabs require configuration:

- **Welcome**, see page **6**
- **Registration**, see page **7** - Set a time frame for unused registration letters and un-activated accounts.
- **NHS Mail** - No Longer used.

Welcome

The welcome message displays on the home page of the website following a successful login by your patients.

To set up the welcome message:

1. Select the **Welcome** tab and type your message in the message window using the formatting editor provided.

➡ See **Using the Message Editor** on page **50** or **Formatting HTML Messages** on page **51** for details.
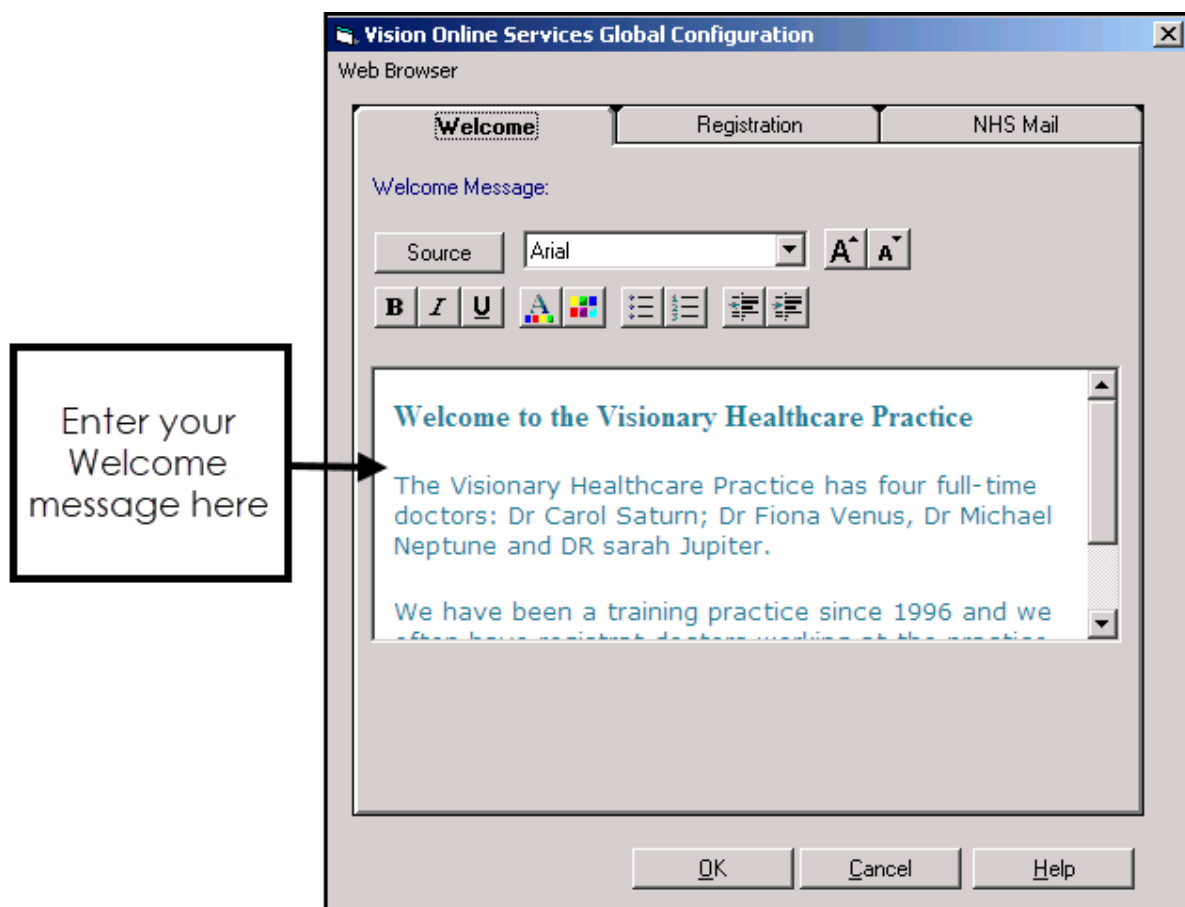
2. Select **OK** to save.

✏ **Note** - To help prevent confusion surrounding who your patients contact if they have a problem, please add advice to your patients within your welcome messages advising them to contact the practice if there is a query about prescriptions or appointments availability.

Registration

From the **Registration** tab, set up the following:

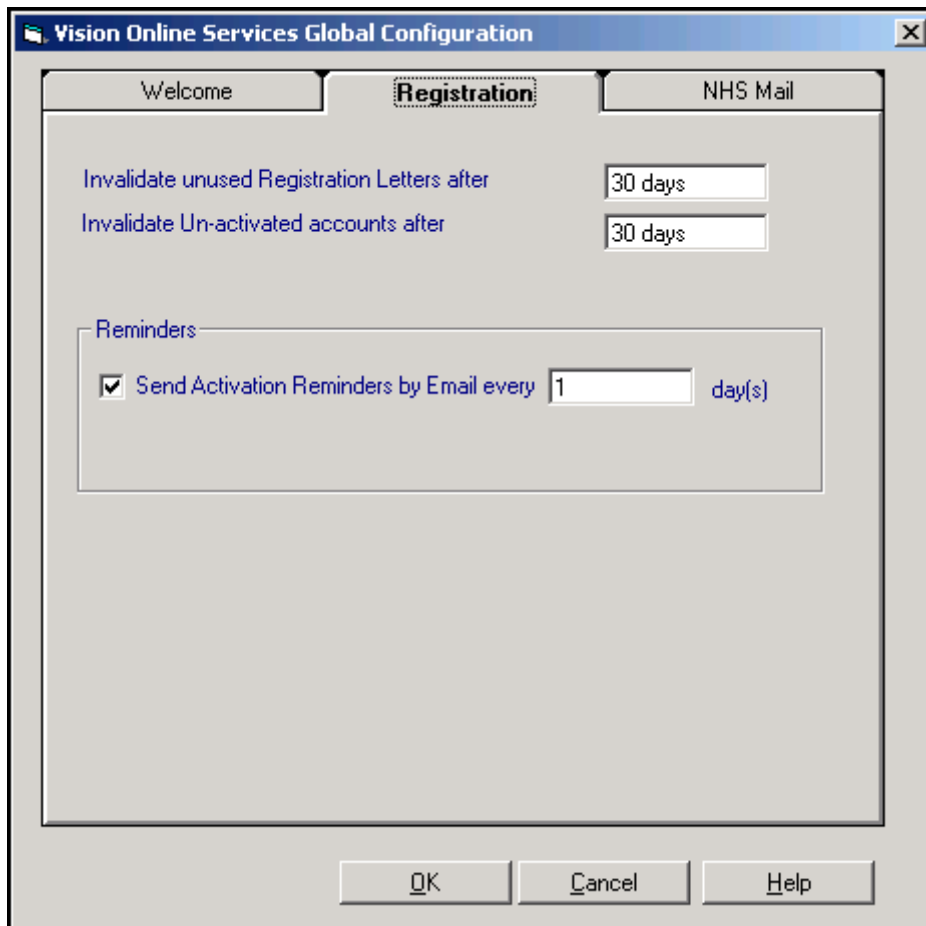- **Invalidate unused Registration Letters after** - Select a time frame for unused registration letters to expire. The expiration date prints on the patients' registration letter.

- **Invalidate Un-activated accounts after** - Select a time frame for un-activated accounts to expire. On registering, patients receive a confirmation code which activates their account. If the account is not activated by the expiry date, they need to re-register for online services.

- **Reminders** (England, Scotland and Northern Ireland only) - Tick to send activation reminders by email every *n* day(s) (where n is the number of days you set). Reminders is ticked by default to enable the service. If you do not want to send email messages remove the tick from the appropriate box:

You have now activated Online Services and need to configure the individual modules.

Enabling a Basic Online Services Account

You can enable your patients to register for a basic online services account, also known as an **Online Services User (OSU)**. Registering as an **OSU** allows patients to quickly and easily register and book appointments online:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **OSU** to allow your patients to create a basic online services account:
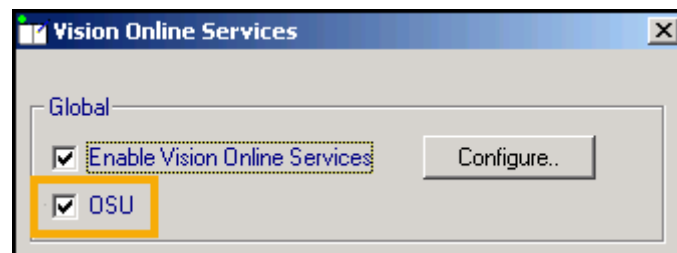
3. Select **OK** to save.

Configuring Online Appointments

> ✎ **Note** - You must have System Administrator rights to enable and configure patient online services (England only, see RBAC Help in the **Vision 3 Front Screen Help Centre** for further details).

To enable online appointments:

1. From **Vision 3 - Management Tools** select **Control Panel - File Maintenance - Online** [Online].

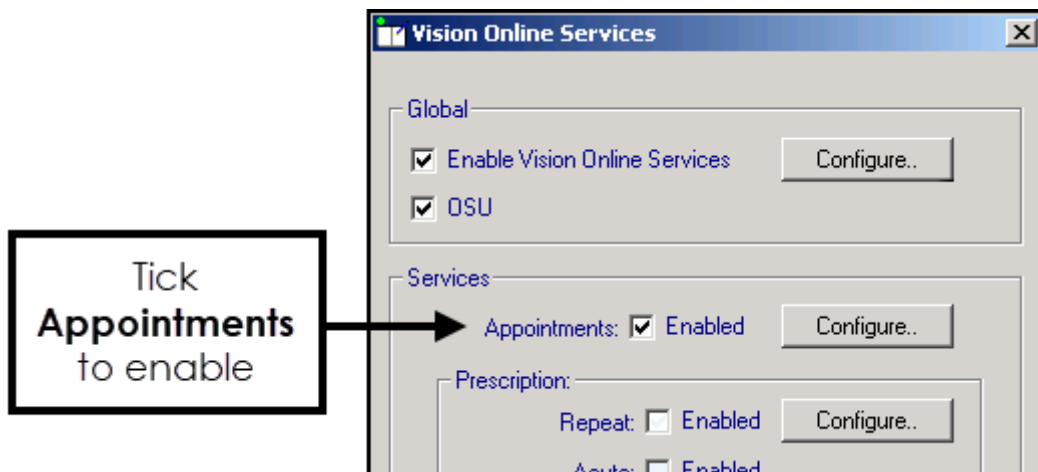2. The **Vision Online Services** screen displays, tick **Appointments** to enable online appointments:

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:
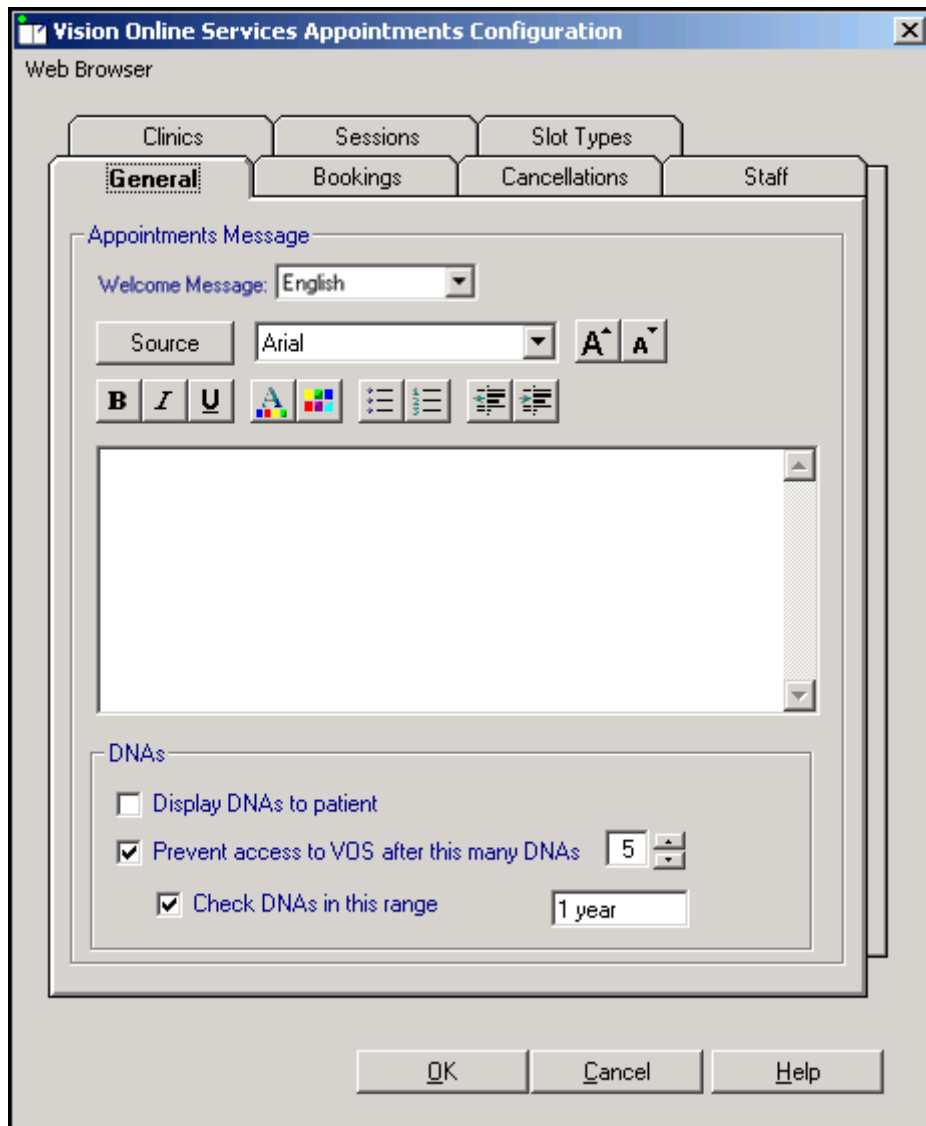
General Tab

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

- **Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.

- **Appointments Message**, see **Add Appointment Message** on page **11**.

- **Did Not Attend (DNA)**, see **Did Not Attends (DNAs)** on page **12**.

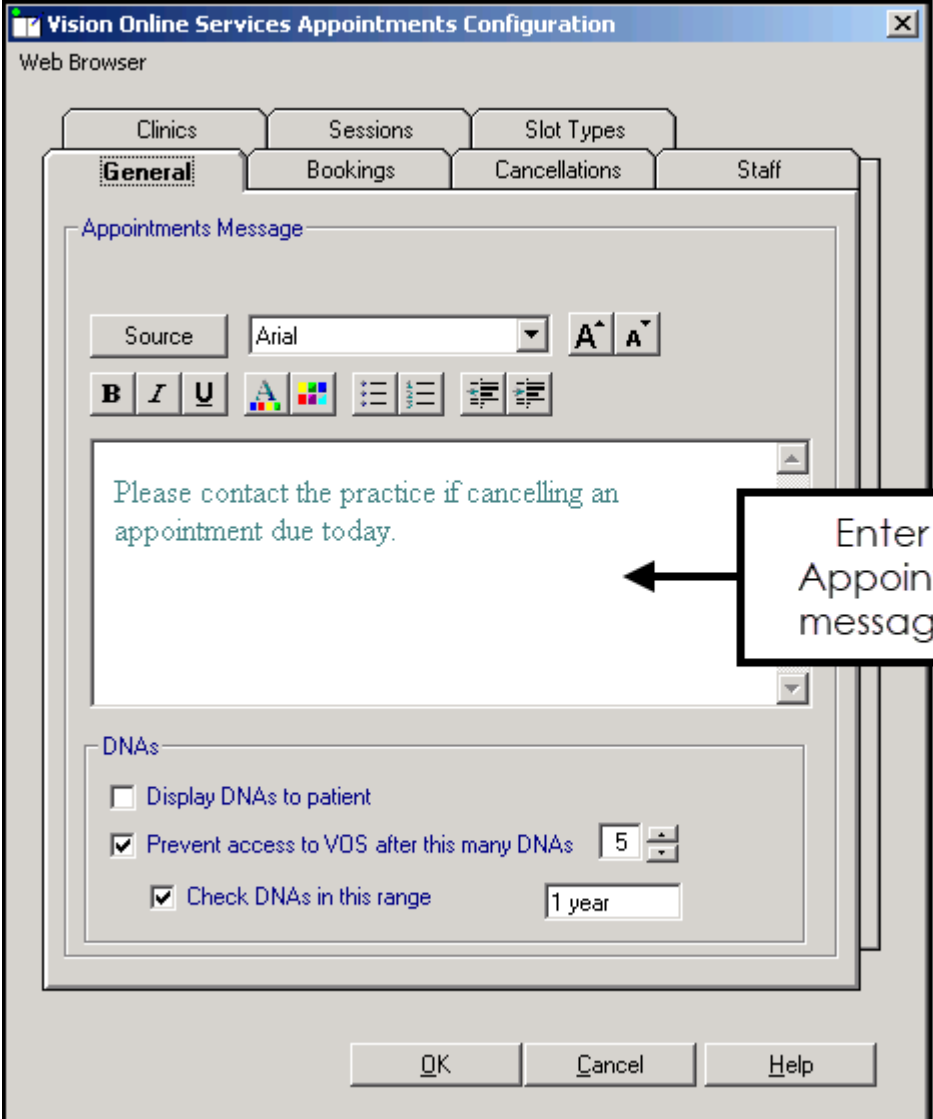# Add Appointment Message

The **Appointments Message** is a practice specific message that displays on the **Appointments** page of the website.

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 **51**:

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 Attends (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 patient access after a set amount of DNAs (removing the tick disables this function) and enter 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 the date range:

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** and they have to contact the surgery direct to arrange an appointment.

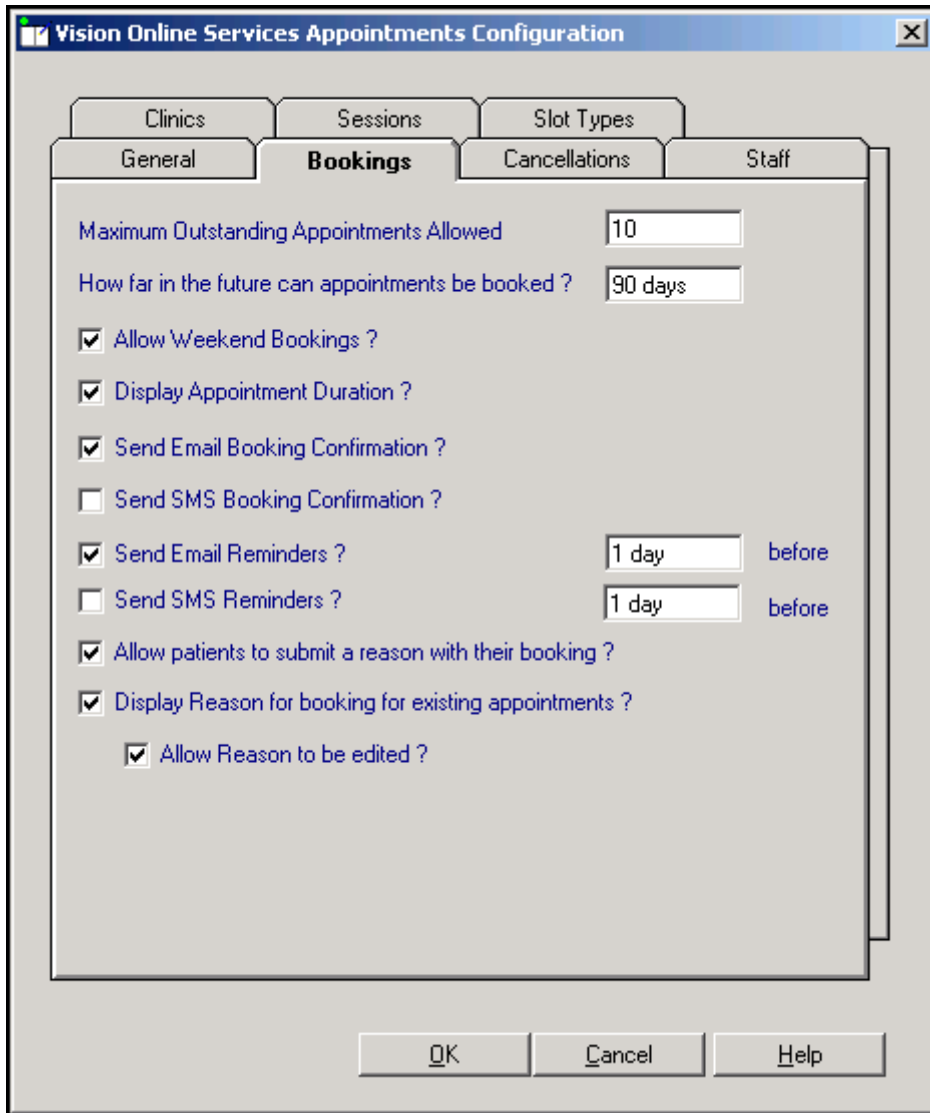# Bookings Tab

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

Complete as required:

- **Maximum Outstanding Appointments Allowed** - You must 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 the following message '*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 must 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 weekend appointments 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 the appointment time the patient is to be reminded by email.

- **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 cancellation email confirmation messages are sent.

- Set cancellation reasons, see **Cancellation Reasons** on page **16**:

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*'.

  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:
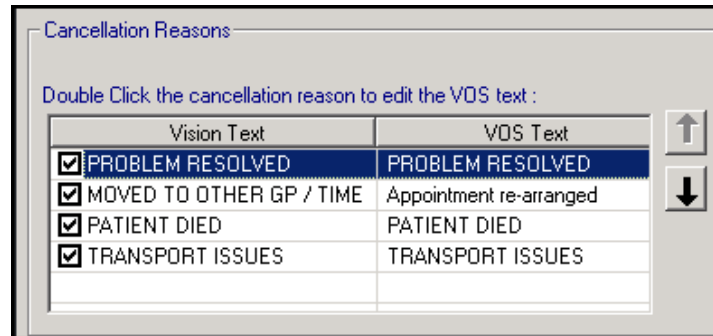
2. Double click the cancellation reason to edit and the **Vision Online Services change VOS Text** screen displays:
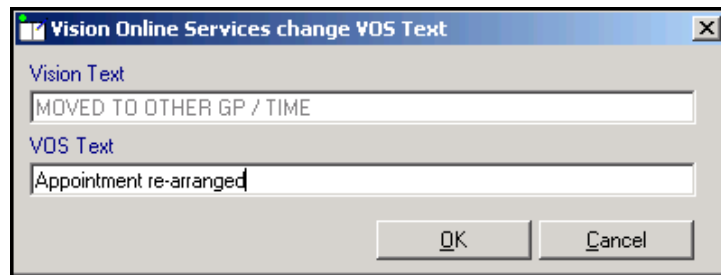
3. Enter the text you require and select **OK**.

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 precedes it.

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

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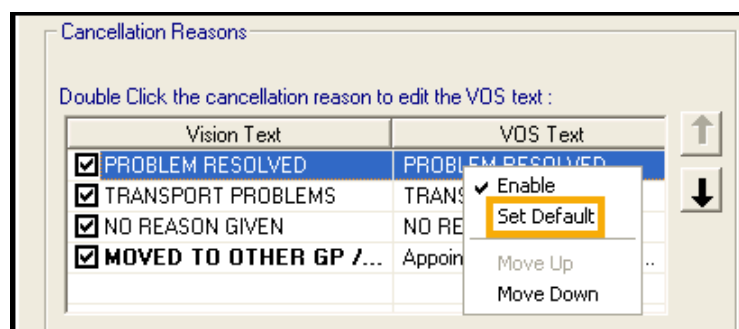
Staff Tab

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

To set up your staff:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.

2. The following options are available however we recommend you do not use them as they do not allow the correct mix of staff:
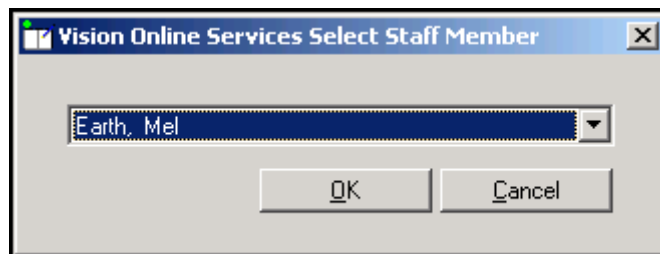
- **All Staff** - Displays all active clinical staff listed in **File Maintenance** (including admin staff with a clinical role).

✏️ **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.

Adding Gender, Special Interests & Language

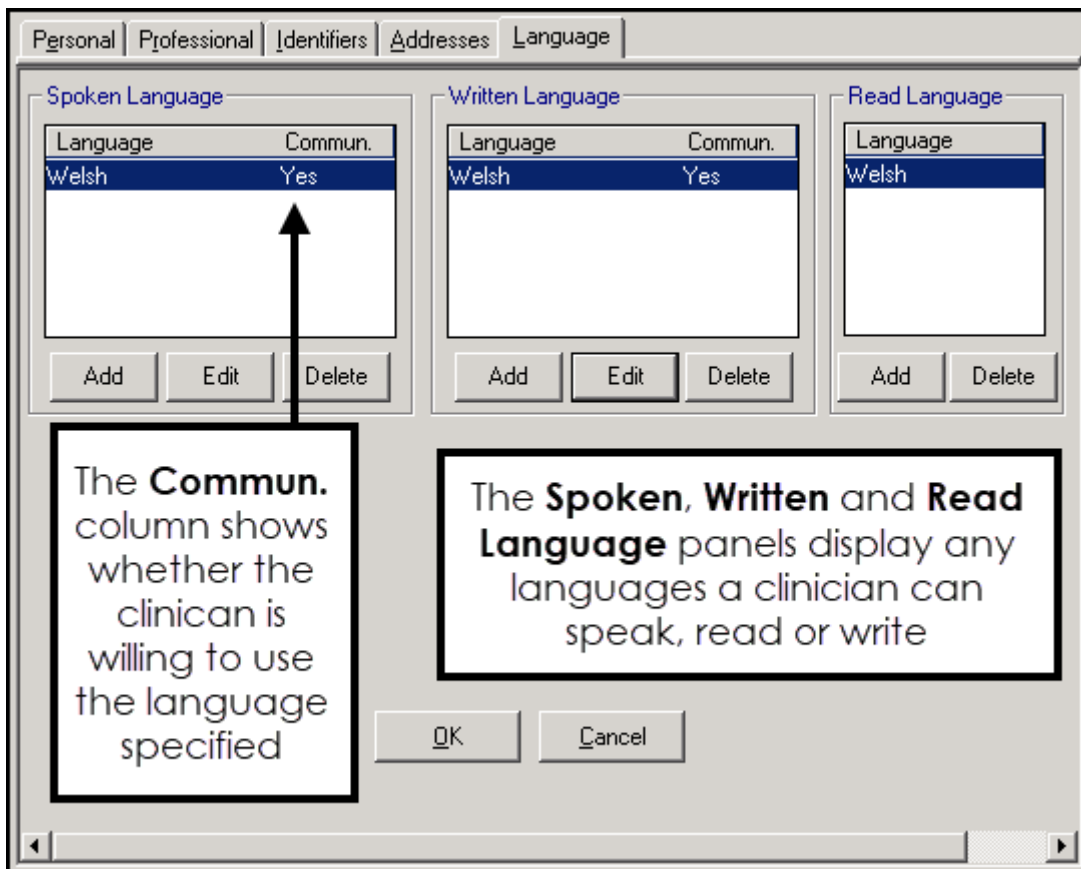**Gender**, **Role**, **Special Clinical Interests**, **Written** and **Spoken Languages** of any clinician providing online appointments displays online. For each clinician selected for online appointments the following should be completed:

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.

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:

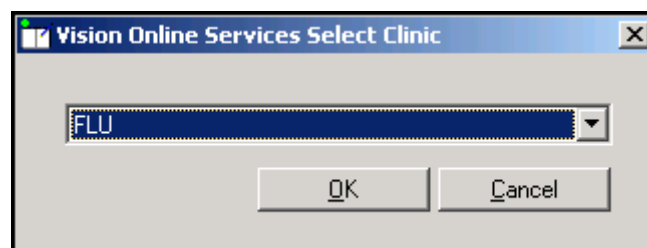1. From the **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.

2. **All Clinics** is ticked by default, to change this to specific clinics, remove the tick:
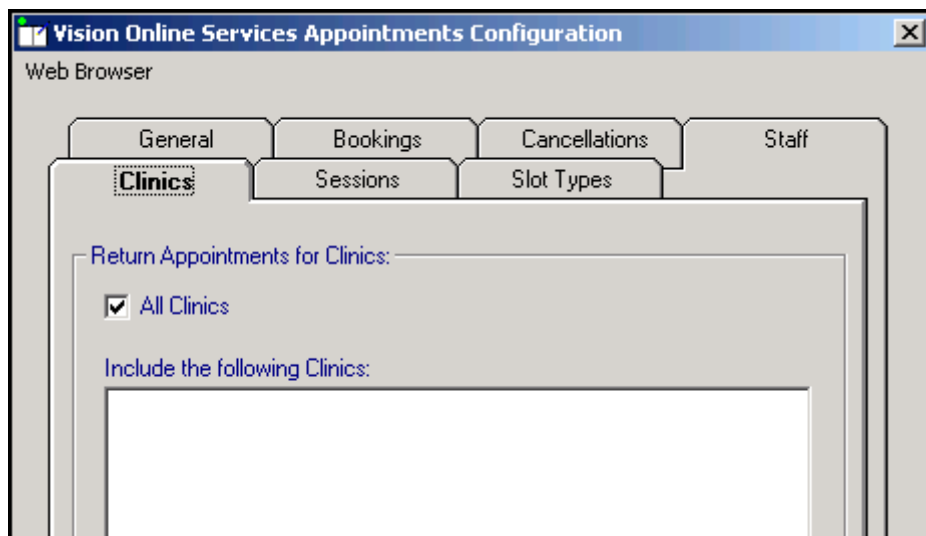
3. Select **Add** and the **Vision Online Services Select Clinic** screen displays:

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:

![Vision Online Services Appointments Configuration - Sessions tab screenshot]
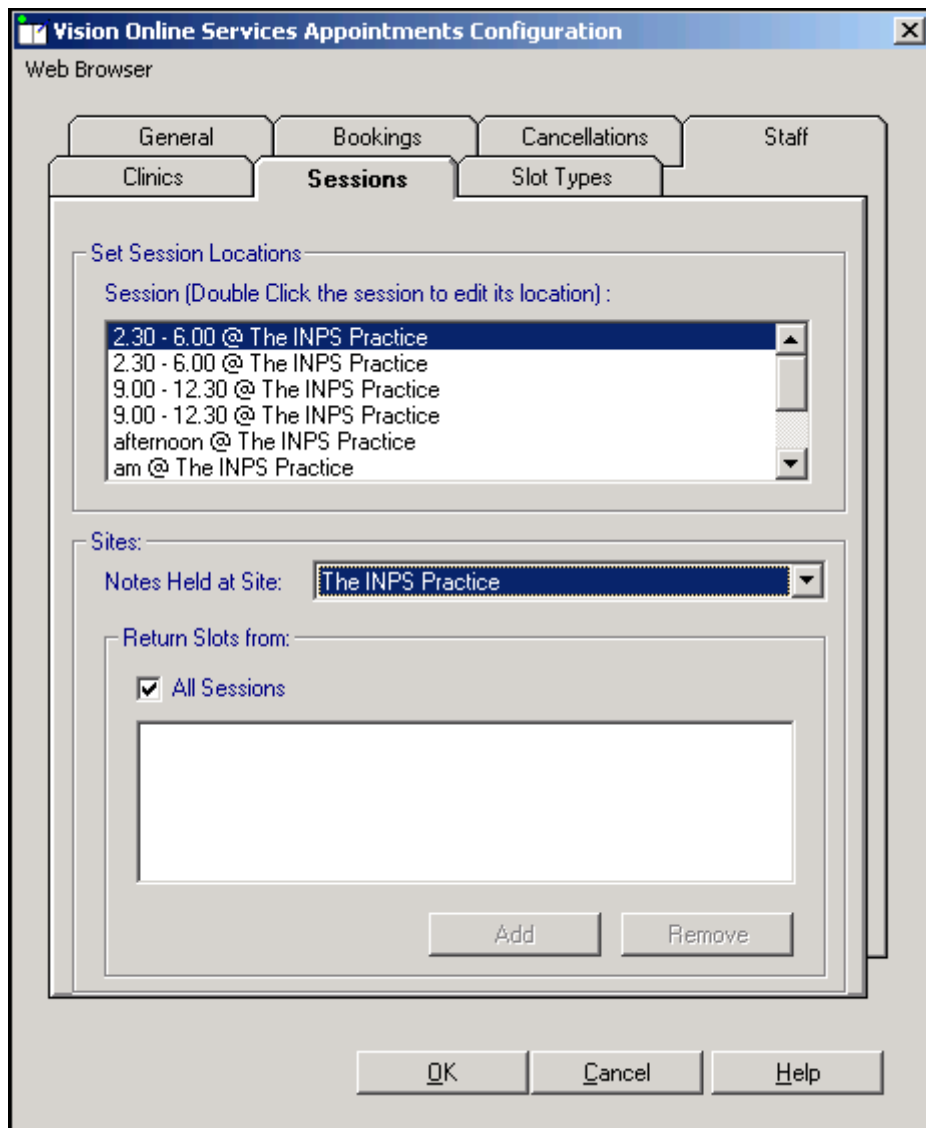
🖊 **Note** - Slots are not available online until they are marked

as **Reserved for Web** (**Vision 3 Appointments** ⬜) or

Available for web (**Appointments** ⬜/⬜).

Setting Sessions, Locations and Sites:

To set session locations and sites:

1. From **Online Services Appointments Configuration** screen, select the **Sessions** tab.
2. Complete as required:

   - **Set Session Locations**:

     - **Session** - 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.

Removing 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.
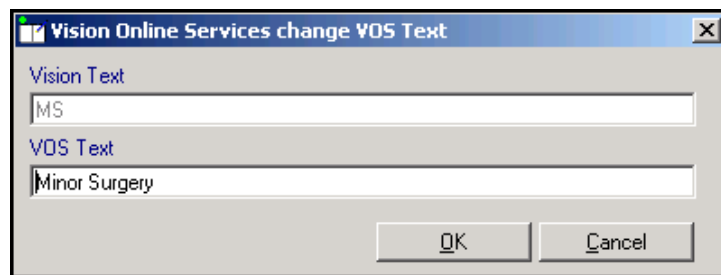
Slot Types Tab

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 that displays:

1. From **Vision Online Services Appointments Configuration** select the **Slot Types** tab:
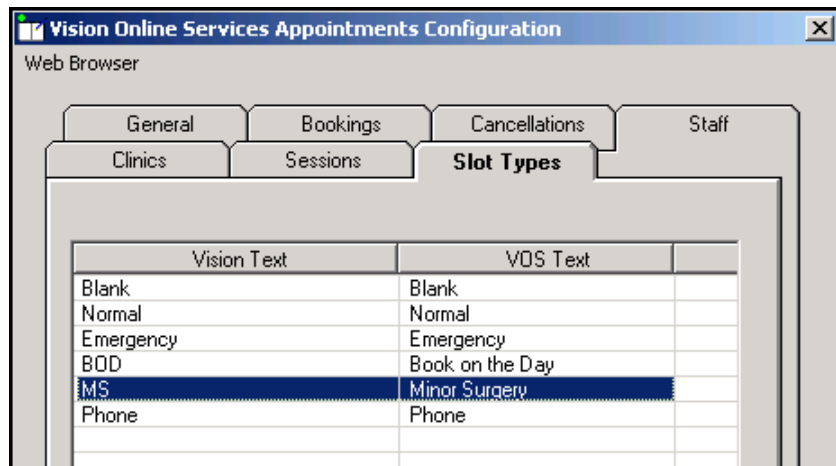
2. Double click the slot type to update and the **Vision Online Services change VOS Text** screen displays:

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 update **Appointments Configuration** when a clinician joins or leaves your practice.

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:

Vision 3 Appointments

Prompting patients about online services

You can turn on a prompt to remind you to register a patient for online services.

To turn on the prompt:

1. From **Vision 3 Appointments** - **Maintenance - System Constants - Bookings**, tick **Prompt to register patient for online booking**.

2. Select **OK** to save and close.

Once selected, each time you select a patient in **Appointments** who is not registered for online booking, you are prompted '*Do you wish this patient to use Online Appointments*':
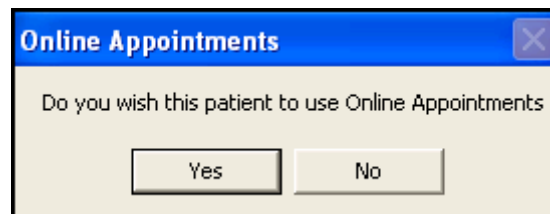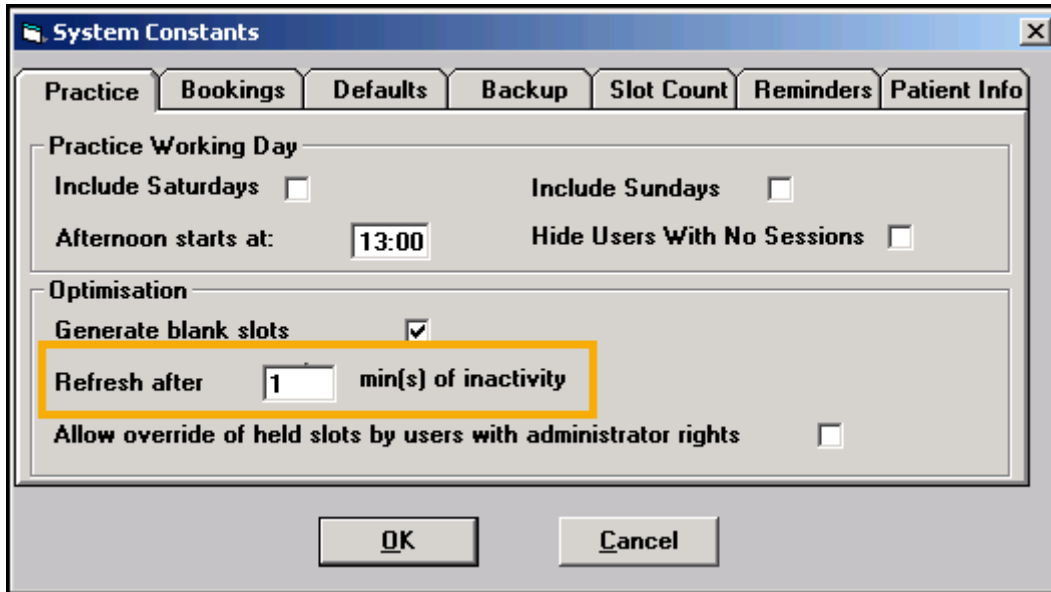
Select either:

- **Yes** - The patient's **Registration Details** screen opens in the background. Complete the appointment booking then select their registration and register the patient for **Online Appointments**.

- **No** - Results in no further action. You are prompted to register the patient for online services the next time you select this patient.

Appointment Refresh Rate

Appointments automatically refreshes to show appointments booked at other sites and via online services.

To set the refresh rate:

1. From **Vision 3 Appointments - Maintenance - System Constants** select the **Practice** tab.

2. Check **Refresh after** and update the number of minutes if required:

3. Select **OK** to save and close.

> 🖉 **Note** - If your screen does not refresh regularly, you may find that when selecting a slot to book, the slot appears as free on your screen, however, if it has been booked at a branch or online, you cannot proceed with the booking.

Setting up Session Types

Session Headers and location display in online services for the patient, so it is useful to keep them to a minimum, for example AM Surgery, PM Surgery. These session headers can then be used to setup numerous individual sessions for the clinicians. To create and maintain Session Types:

1. From **Vision 3 Appointments**, select **Plan - Session Type**:
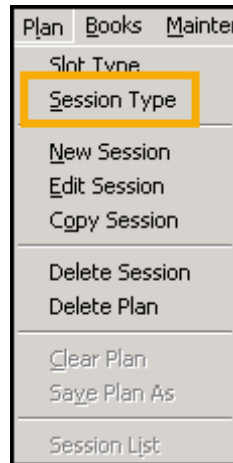

2. If you are, or have, a branch surgery, it is recommended that you have session headers for each site. For example, '*AM Surgery - Main Site*', '*AM Surgery - Branch Site*'. To help identify site locations for your patients consider replacing Main or Branch with the actual name.

3. To add a new session, select **Add**, type your description in the description window and select **OK**. To add further sessions select **Add** and repeat this process until you have added all the required sessions.

To edit an existing session

1. Highlight the session in the **Session Types** screen and select **Edit**:
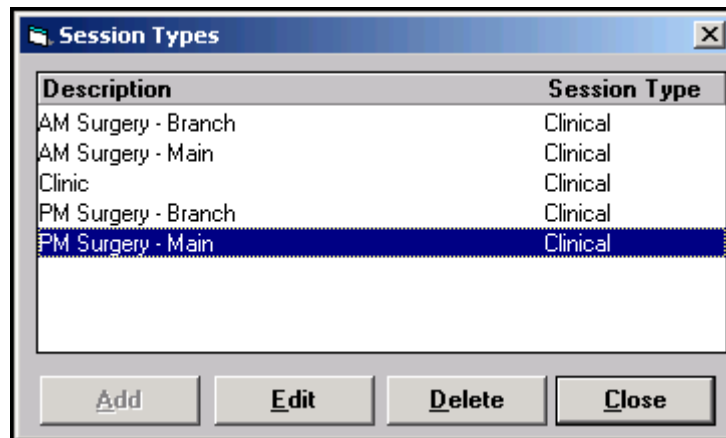
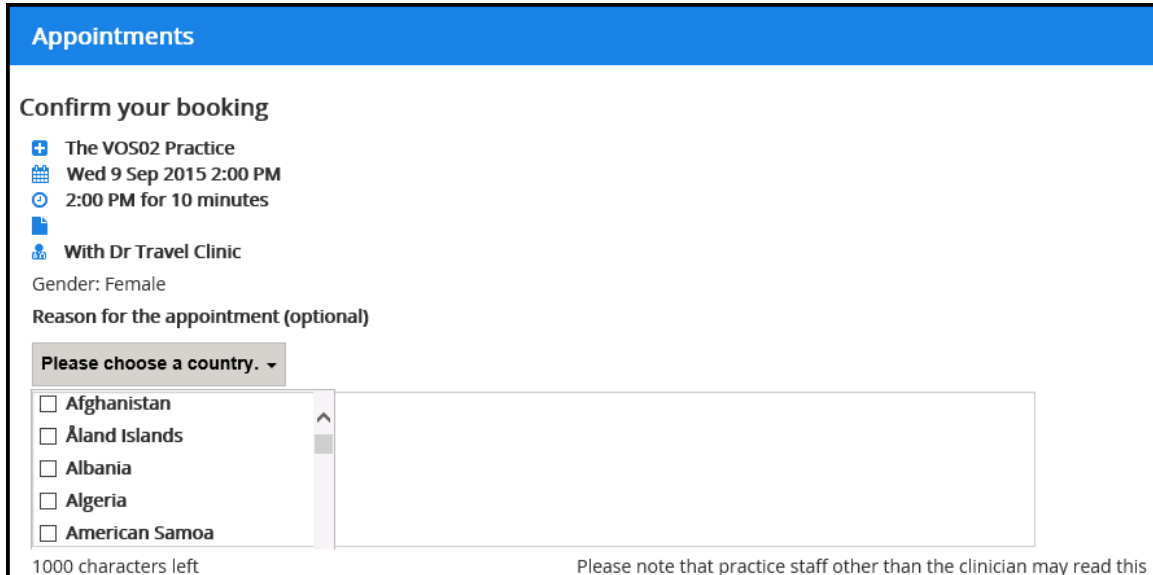2. Change the text in **Description** as required, select **OK** to save and close:
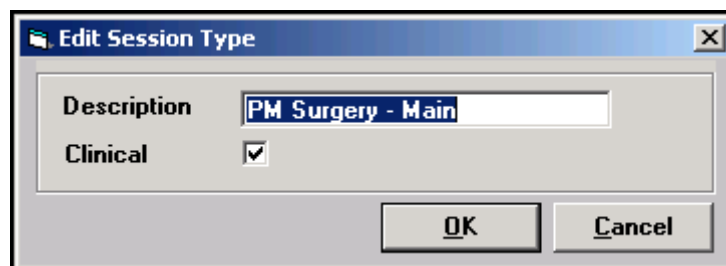
To delete a session

1. Highlight the session you want to remove on the **Session Types** screen and select **Delete**.

2. You are prompted '*Are you sure you want to delete the selected session types*', select **Yes** to confirm deletion, or select **No** to cancel the deletion.

> **Note** - If the session is in use, you are prompted '*Session Type is being used in a Weekly Plan. You cannot delete this item*.' You need to edit the Weekly Plan to enable the deletion of the session type.

Travel Clinics

Sessions can be defined as travel clinics. This enables the patient to select a country from a list, which is then added to the appointments comments and can be viewed in **Consultation Manager** and **Appointments**:
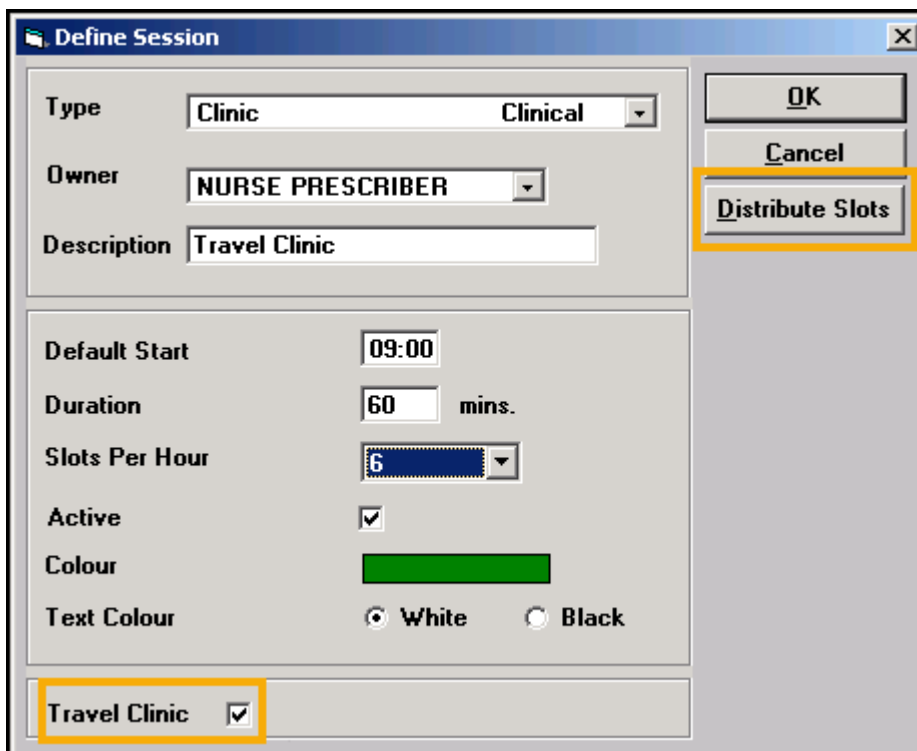
To create a **Travel Clinic** session:

1. From **Vision 3 Appointments** select **Plan - New Session** to create a new session, or **Edit Session** to change an existing session.

2. Check the existing details or add new details as required.

3. Tick **Travel Clinic** and then select **Distribute Slots** and change the slots to a **Web Default travel clinic** slot type:

4. Select **Distribute Slots** and change the slots to a **Web Default travel clinic** slot type.

5. Select **OK**.
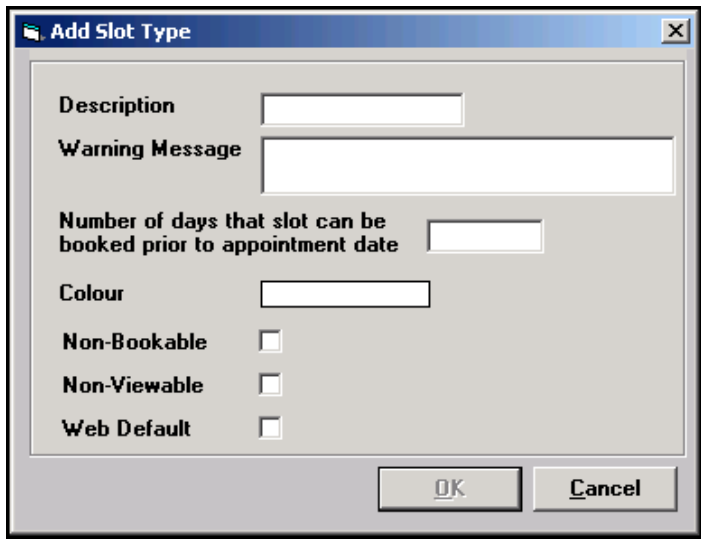
6. Select **OK** to save and close the session.

The session is now a **Travel Clinic** and can be added to the appointment books as required.

Configuring Slot Types and Reserving Slots 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.

When creating or editing **Slot Types** the following options are available:

- **Non-Bookable Slots** - These are a slot type which cannot be booked or viewed from **Consultation Manager** or online:

  1. From **Vision 3 Appointments**, select **Plan - Slot Type**.

  2. Select an existing slot type and select **Edit**, or **Add** to create a new slot type.

  3. Tick **Non-Bookable**:

- **Non-Viewable Slots** can be viewed from **Appointments**, **Consultation Manager**, **Mail Manager**, and 3rd party applications. These slots do not display online for patients to book, however when booked at the practice, confirmation emails are sent to patients registered for online services.

> **ⓘ Important** - If appointments are used for messages or tasks about a patient, for example, 'Home Visit, message from patient, and the patient is registered with **Patient Services**, an appointment reminder email is sent to the patient even if the slot type is non-viewable.

> **💡 Training Tip** - For internal messaging or tasks, practices should consider using **Daybook/Tasks** which is specifically designed to create, track and complete administrative tasks.

1. From **Vision 3 Appointments**, select **Plan - Slot Type**.
2. Select an existing slot type and select **Edit**, or **Add** to create a new slot type.
3. Create a **Slot Type** as usual adding in description, warning message and colour as per practice protocol.
4. Select **Non - viewable**.
5. Select **OK**.

- **Web Default/Bookings** - Defining a slot as Web Default/booking automatically reserves the slot(s) for web use when added to a session. Each time a session is extended that contains Web Default/bookings slots, they are automatically created and marked **Reserve for Web**. You can also book Web Default/bookings slots from within **Appointments**:
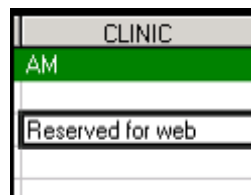
1. From **Vision 3 Appointments**, select **Plan - Slot Type**.
2. Select an existing slot type and select either **Edit** or **Add** to create a new slot type.
3. Create **Slot Type** as usual adding in description, warning message and colour as per practice protocol.
4. Select **Web Default**.
5. Finally, select **OK**.

Reserving Slots

For slots to be available online they must first be reserved in **Appointments**. Only slots marked **Reserved for Web** are available for patients to book online.
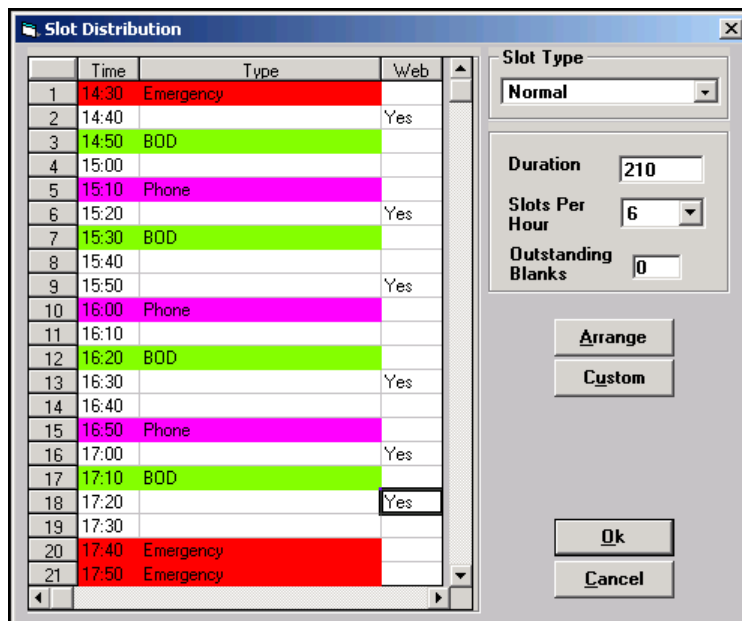
You can define slots for web booking:

- Automatically when adding/editing sessions. See **Reserve for Web - Automatic** on page **30.**

- Manually each time the appointment books are extended or modified. See **Reserve for Web - Manual** on page **31**

> ✏️ **Note** - **Reserved for Web** slots also require Staff and Session setup in Online Services before they are available to patients.

Reserve for Web - Automatic

Reserved for Web slots can be automatically created in the following ways:

1. From **Appointments**, select **Plan - New Session** or edit an existing session and select **Distribute Slots**.

2. Select a slot that has **Web Default** ticked for distribution in the session, **Yes** displays in the web column.

3. Select **OK**.

4. Select **OK** again:

> ✏️ **Note** - When you next run **Extend Books**, the **Reserved for Web** slots that have been set as default appear online and in the Vision Appointment book.

Reserve for Web - Manual

Reserving Slots manually can be done for:

- Individual appointments
- Multiple appointments
- Recurrent appointments

From **Vision 3 Appointments**, to reserve individual appointments for use by online appointments:

1. Open a view and highlight the required slot.
2. Right click and select **Reserve for Web**.
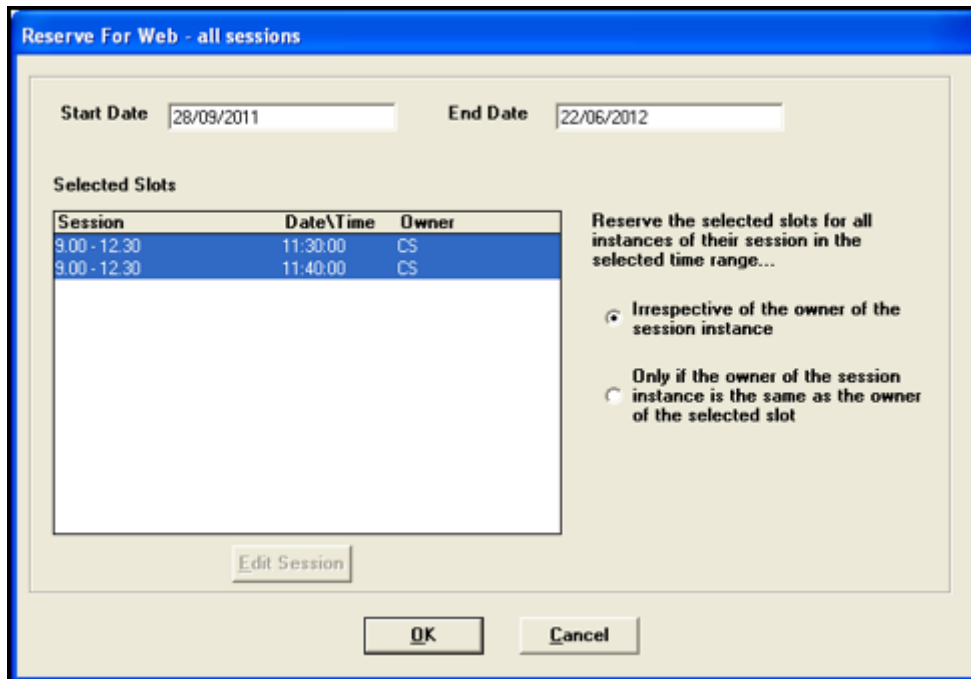3. The selected slot now displays as **Reserved for web**:
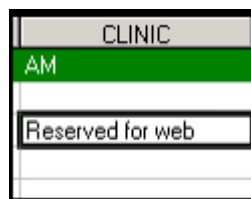
> **Note** - To release the reserved slots, right click on the slot and select **Reclaim from Web**.

From **Vision 3 Appointments**, to reserve multiple appointments for use by online appointments:

1. Open a view and find the slots required.
2. Highlight the required slots by holding the **Control Key** on the keyboard, then selecting each slot required.
3. Right click and select **Reserve for Web**.
4. The selected slots now display as **Reserved for web**.

From **Vision 3 Appointments**, to reserve recurrent appointments for use by online appointments, for example, 11:00 appointment slot and all future matching 11:00 slots with matching session type and book owner, within a specified time frame:

1. Open a view and find the slot(s) to reserve, highlight the required slot(s).

2. Right click and select **Reserve for Web - All Sessions**.

3. The **Reserve For Web - all sessions** screen displays. Enter a **Start** and **End** date (double click to access the calendar) to specify when the slots are to be reserved.

4. You are prompted to '*Reserve the selected slots for all instances of their session in the selected time range*'. Select either:

   - **Irrespective of the owner of the session instance**

   - **Only if the owner of the session instance is the same as the owner of the selected slot**:

6. Each current slot that matches the selection is now reserved for use for online appointments. When extending appointment books, slots are reserved for the time period specified. The selected slots display as **Reserved for Web**.

7. To release the reserved slots, right click on one of the affected slots and select **Reclaim from Web - All Sessions**.

> **ⓘ Important** - You need to repeat this process when the time period expires to reserve new extended slots.

Appointments and Appointments Setup
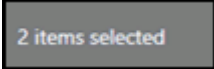
Configuring Slot Types for Web Use

Appointments booked by your patient online must be reserved by being marked **Available 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

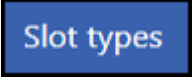To manually set a slot as **Reserved for Web**:

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

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

3. Select **Enable web booking** and the selected slot(s) update to **Available for Web** and are indicated by a **Globe** within the slot.

Automatically Creating Slots Available Online

To automatically create **Web booking** slots:

1. From **Appointments Setup**, select **Slot types** | Slot types |.

2. Select either **Add slot type** | 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** (https://help.cegedim-healthcare.co.uk/Appointments_new/content/home.htm) and the **Appointments Setup Help Centre** (https://help.cegedim-healthcare.co.uk/Vision_Appointments_Setup/Content/Home.htm) for further details.

Enabling Online Prescriptions

To enable online prescriptions:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **Prescription** and then tick:

    -   **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.

You need to configure how your patients see prescriptions within your **Patient Online Services** website. You should consider the following:
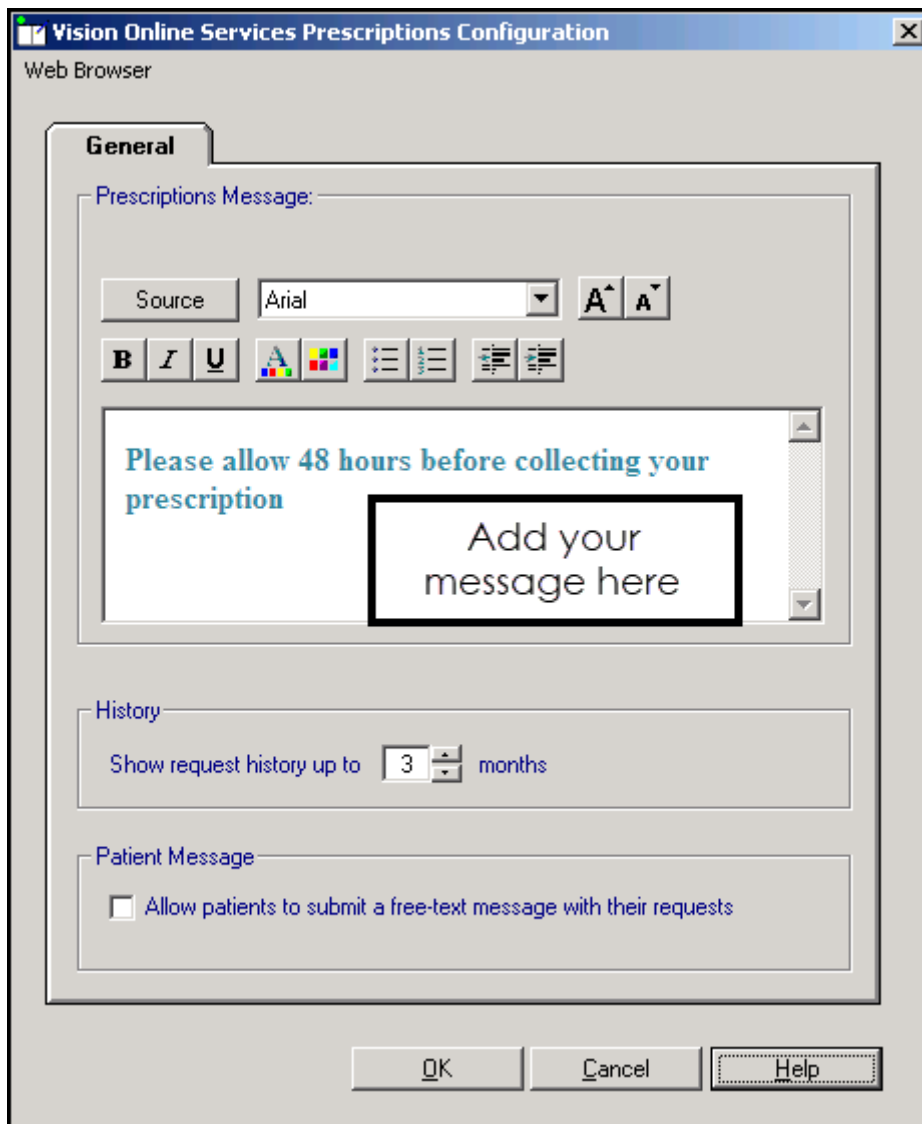
From **Control Panel - Online** :

Add 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 prescription message in the **Prescriptions Message** section of the **General** tab using either:

- The formatting editor provided, see **Using the Message Editor** on page **50**, or

- HTML formatting tags, see **Formatting HTML Messages** on page **51**:

Note - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Prescriptions 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 to display the patient's repeat request history:

- From **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
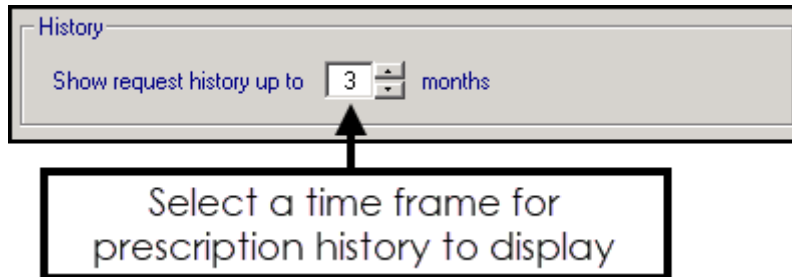
Patient Message

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

- From **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
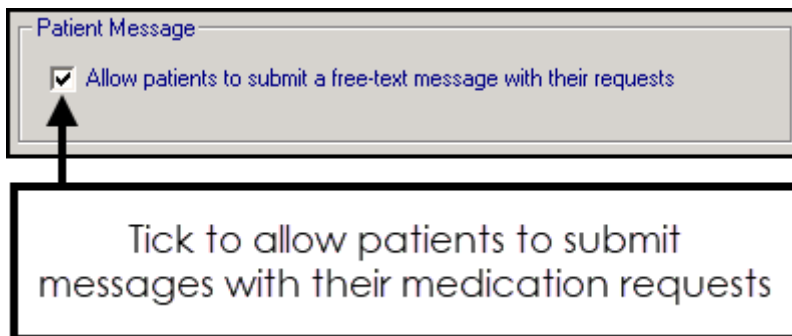
Note - When this option is selected, a warning message displays, advising the practice to ensure that the necessary processes are in place to check any messages entered by the patient.
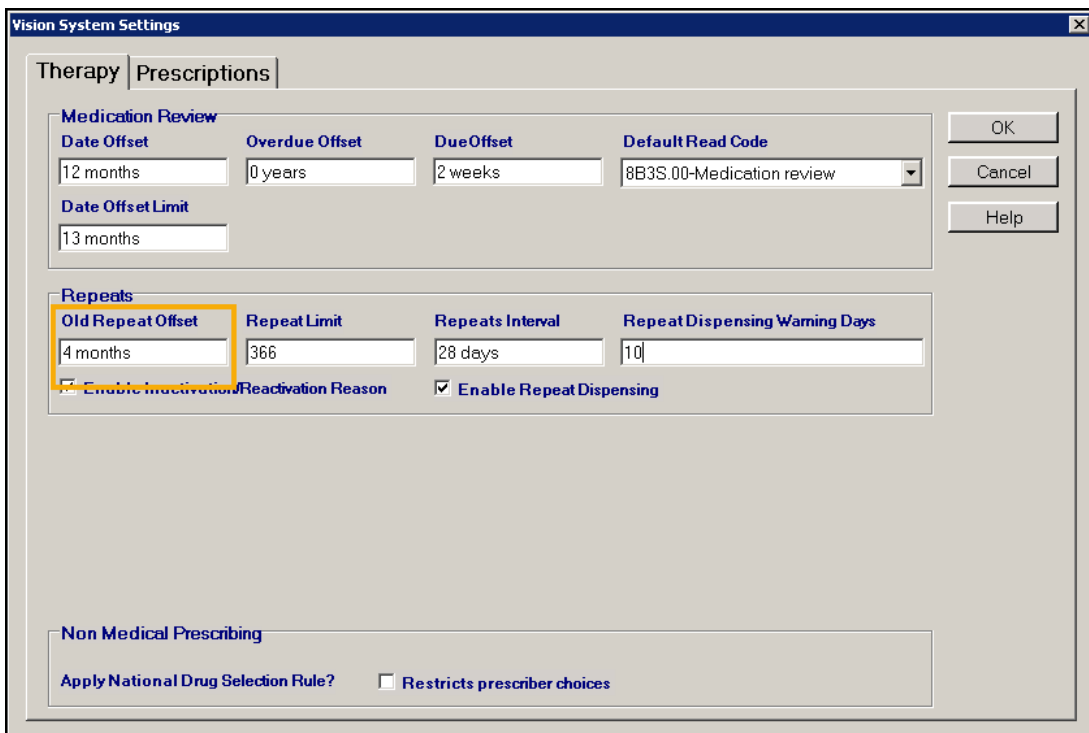
And from **Control Panel** - **Settings** [Settings]:

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 - Settings** [Settings], select the **Therapy** tab.

2. In **Repeats** - **Old Repeat Offset** add a time span, for example, if you select an offset date of '4m', patients can only order repeat prescriptions which have been issued within the last 4 months, you can use *D* for days, *M* for months and *Y* for years here. Repeats not issued within this time display on the **Unavailable** list:

3. Select **OK** to save.

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

Enabling Online Patient Messaging

The **Patient Messaging** app is a **Vision 3** app that allows you to both send and receive messages to and from your patients, without having to leave **Vision 3**.

Your patients have access to this facility from within the **Patient Services** website.

To enable **Patient Messaging**:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **Patient Messaging Enabled** to enable **Patient Messaging**.

3. Select **OK** to save.

Enabling Online Patient Summary

Patient Summary allows you to enable your patients to view a subset of their medical record.

In **England**, **Scotland** and **Northern Ireland** once enabled, providing the two clinical terms that permit access are added to the patient record in the correct order, see **Record Read Code for Access to Patient Summary** on page **41**, your patients can view their:

- **Allergies** - Drug and non-drug.
- **Medication Issued** - Acutes and repeats (including discontinued repeats).
- **Immunisations** - Only those recorded in the **Immunisations Structured Data Area** (SDA) with a **Status** of **Given** display.

To enable this:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.
2. Tick **Summary Data** to enable patient access to their summary data.
3. Select **OK** to save.

Record Read Code for Access to Patient Summary

In order for your patients to view their **Patient Summary** once the functionality is enabled at your practice, you must add the following data to the patient record in the following order:

- **Step 1 - Patient identity verification** - See **Adding Patient Identity Verification Details** on page **42** for details, this step should have been completed when the patient was registered for online services.

- **Step 2 - Electronic record notes summary verification** - See **Recording the Read Code for Access to Patient Summary** on page **45** for details.

It is Important to note -

- You must only record **93440 Electronic record notes summary verified** if the patient already has **91B..00 Patient Registration Data Verified** recorded. This is an NHS requirement and is the practice's responsibility to manage.

- It may take up to 24 hours from adding these codes until the patient can see their **Summary** tab.

- Before going live with **Patient Summary**, you should check for patients who already have **93440 Electronic record notes summary verified** on their record, recorded in relation to something other than the online **Patient Summary**. For such patients, you can edit the record and change the Read code to another appropriate Read code.

- You can start to record and monitor Read codes for patients to access **Patient Summary** at any point, you do not need **Summary Data** enabled to do this.

- You may wish to review patient records before allowing patients to access their summary. You can track patients with or without this Read code using the Online Services Clinical Audit.

Adding Patient Identity Verification Details

When a patient asks to register for online services, you must ask them to provide a form of identification. Once viewed, you must record that you verified their identity on their patient record in both of the following ways:
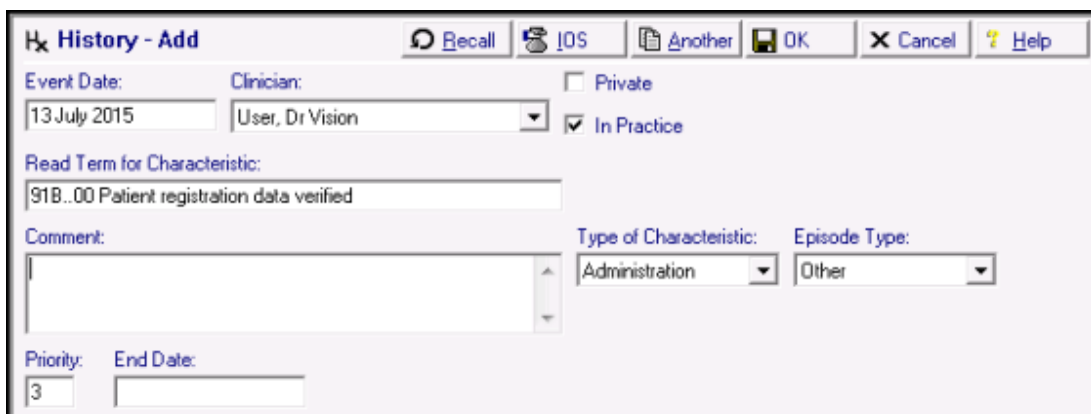
Record a patient registration data verified history entry

1. From **Consultation Manager** , select the patient required.

2. In **Read Term - Add**, type **#91B** and press enter.

3. **91B..00 Patient registration data verified** displays, select **OK** to trigger the **History - Add** form:

4. On the **History - Add** form, add comments and change the **Priority** if your practice protocols dictate:


5. Select **OK** to save.

> *Note* - You can add **91B.00 Patient registration data verified** if you can vouch for a patient who does not have documentation. You should record that the patient has been vouched for in the free text notes.
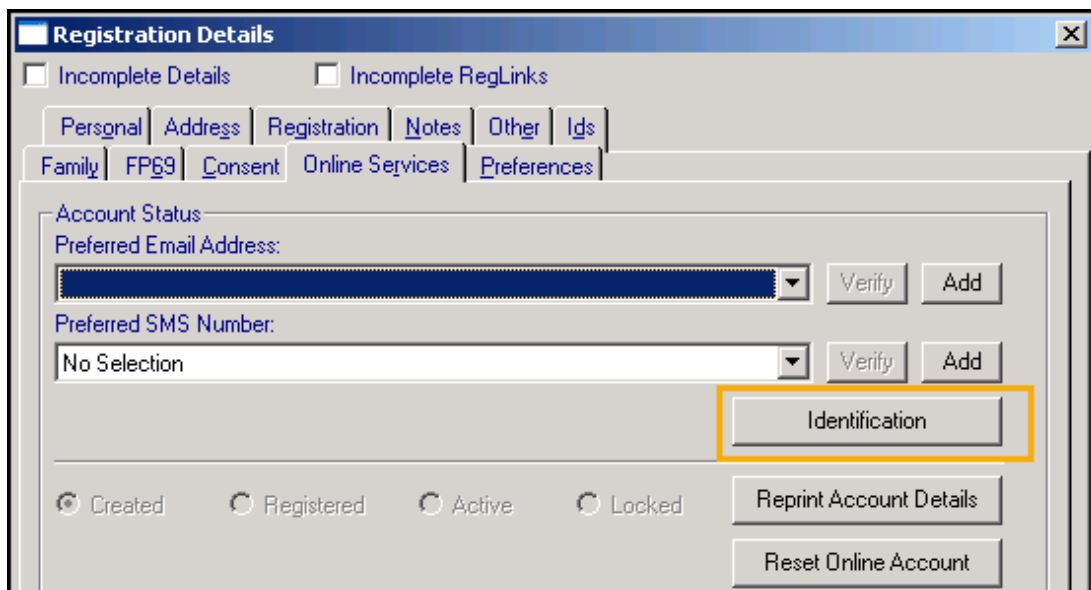
Record an Identification entry

Identification is a screen for recording the type of identification presented by the patient within **Registration**. If identification is not recorded it is not possible to complete the creation of the online account.

Select either:
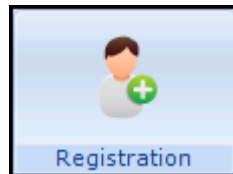
- **Registration** , select the patient required, select the **Online Services** tab and then select **Identification**:

or,

- **Consultation Manager** , select the patient required, select **List** and then select **Identification:**
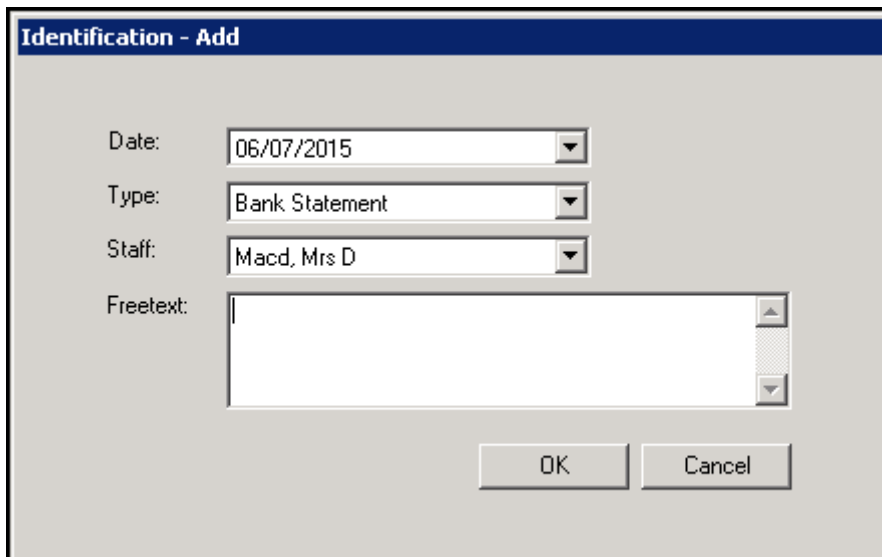
1. The **Identification Type** screen displays:

2. Select **Add** to add details.
3. The **Identification - Add** screen displays:

   Complete as required:

   - **Date** - Completes with today's date. Select to display a calendar and choose the date the identification was presented if required.

   - **Type** - Select from the available list:
     - **Personal Vouch**
     - **Information confirmation**
     - **Passport**
     - **Driving Licence**
     - **Birth Certificate**
     - **Bank Statement**
     - **Utility Bill**
     - **Other**

- **Staff** - Select the staff member that checked the identification from the available list, this initially defaults to the person currently logged in.

- **Freetext** - Enter any free text comments required.

✏️ **Note** - If a patient provides another form of ID in the future, rather than edit the existing information, you should add a new entry.

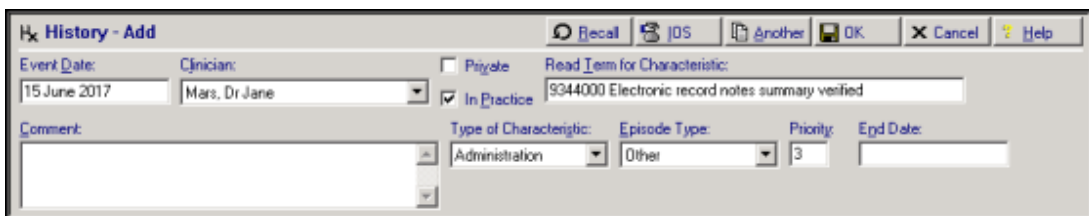## *Recording the Read Code for Access to Patient Summary*

In order for your patients to view their Patient Summary data, you must add the following clinical terms to each relevant patient record after recording their identification:

- **93440** Electronic record notes summary verified

To add the clinical term:

Consultation Manager

1. From **Consultation Manager** , select the relevant patient and where required, open a consultation.
2. In **Read Term - Add**, simply enter **#93440** and press enter.
3. Select **OK** and **History - Add** displays:

4. Select **OK** to save.

Enabling Online Detailed Coded Record Access

You can allow your patients access to view their own **Detailed Coded Record (DCR)** using their online service account:

✏️ **Note** - Your patients can only see the coded aspect of their record, free text and comments are not available to view at this time.

---

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** 🖼️ and the **Vision Online Services** screen displays.
2. Tick **Detailed Coded Record** to enable the first level of DCR consent.
3. Select **OK** to save.

ⓘ **Important** - DCR has very precise consent requirements, please refer to Setting Patient Consent and DCR Review App in the **Patient Online Services Help Centre** for guidance.

Enabling Online Demographic Access

Providing they are registered for online services, you can allow your patients to view and/or update certain aspects of their demographic information. This is designed to save administration time within your practice.
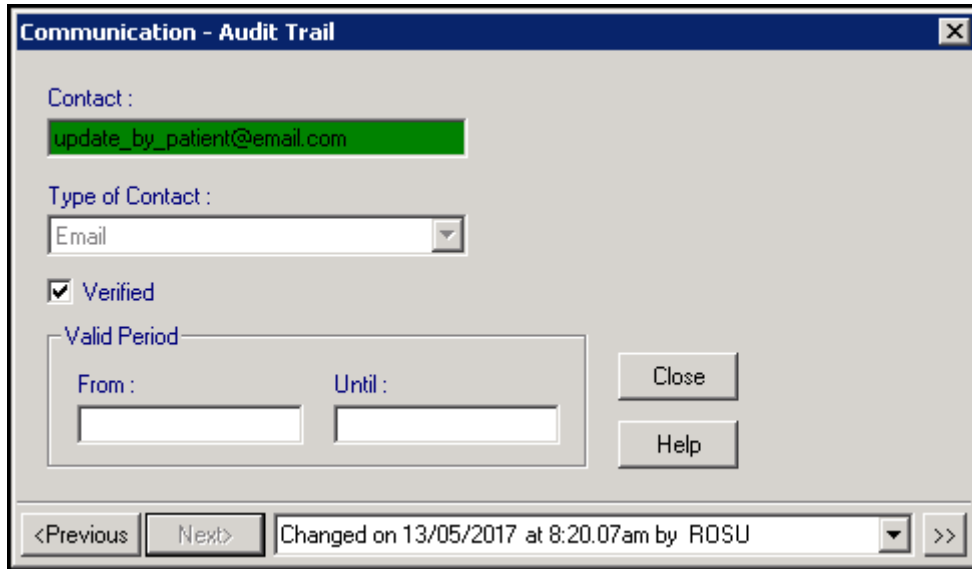
To enable this facility:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Under the **Demographics** section, select from:

   - **View** - Tick to enable your patients to view their own:

     - **NHS Number/CHI Number/H+C Number**

     - **Full Name**

     - **Date of Birth**

     - **Gender**

     - **Marital Status**

     - **Usual GP** (title, first name and surname)

     - **Main Address**

     - **Email** (preferred)

     - **Telephone Numbers** (latest recorded mobile and home number)

     - **Ethnic Category** (latest recorded)

     - **Branch Surgery attended** (determined by the **Notes kept at** option in the patient's **Registration** record)

   - **Auto Update** - Tick to enable your patients to be able to update their own:

     - **Home phone number**

     - **Verified mobile number**

     - **Preferred email address**

     - **Preferred Spoken Language**

     - **Preferred Written Language**

3. Select **OK** to save.

The audit trail shows the update has been made '*by ROSU*', indicating a patient submitted amendment:

England Only - If your patients update their demographic information via **Patient Services**, the next time they are selected in **Vision 3**, a **PDS Mismatch** screen displays. Check the update is **by ROSU** and providing it is, the update should be accepted.

Enabling Pharmacy Nomination

The following **Pharmacy Nomination** options are available:

- **View** - Allows your patients to view their preferred pharmacy and in England they can also see their **Electronic Prescription Services (EPS) Nominated Pharmacy**.

- **Update** - England only, allows your patients to update their **EPS Nominated Pharmacy** which in turn updates the **Patient Demographic Service** (PDS).

> ✏ **Note** - The **View** and **Update** (England only) **Pharmacy Nomination** is enabled by default.

To enable the online services **Pharmacy Nomination** option for all of your patients:

1. From **Control Panel - File Maintenance**, select **Online** 📝.
2. From **Pharmacy Nomination**:
   - Tick/untick **View** to enable/disable your patients ability to see:
     - Their **Preferred Pharmacy** (as set up in Patient Details).
     - **England** only - Both their **Preferred Pharmacy** and their **Nominated EPS Pharmacy**.

England only

- Tick/untick **Update** to enable/disable your patients ability to update their **Nominated EPS Pharmacy**:

English - **Pharmacy Nomination** options

Scotland, Wales and Northern Ireland **Pharmacy Nomination** options

> ✏ **Note** - England only, if you disable/enable **Update** without enabling/disabling **View** a message displays and **Update** is changed in line.

Patient Online Services Configuration Utilities

You can edit and format patient messages as follows:

Using the Message Editor

The message editor allows you to format online messages. It is available in the **Welcome**, **Appointments** and **Prescription** message configuration screens:
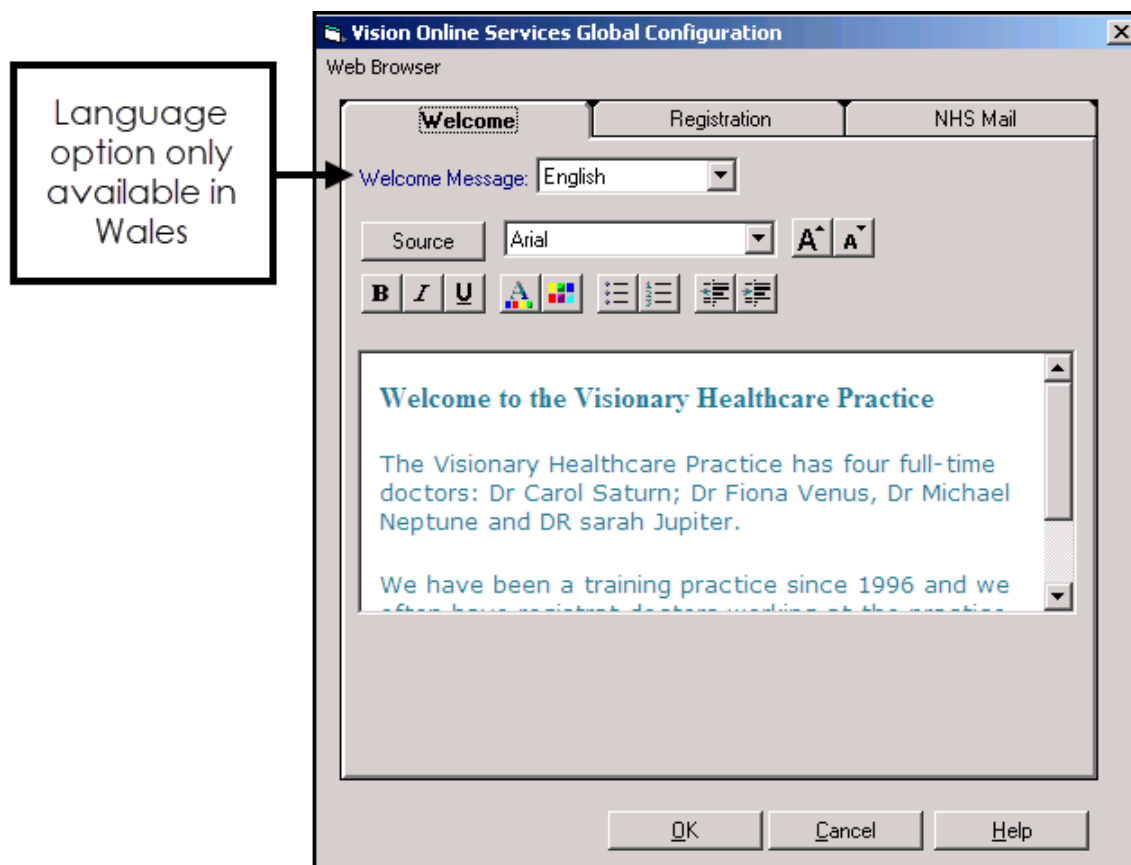
Enter your message in the **Welcome Message** screen using the following formatting:

- **Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.

- **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. See **Formatting HTML Messages** on page **51** for details.

- **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**.

> **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 do not display on the website.

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>	*Italic text*
<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**