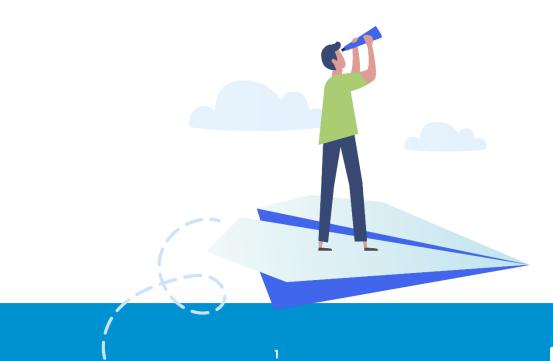


Patient Services Configuration User Guide

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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 1 Online Maintenance - Online and the Vision Online Services screen displays: Select Configure to set Yision Online Services × up: Global Patient Online Services 🔽 Enable Vision Online Services Configure. 🔽 OSU Services-Appointments Appointments: 🔽 Enabled Configure. Prescription: Prescriptions Tick to Repeat: 🔽 Enabled Configure. enable Acute: 🔽 Enabled the Patient Messaging: 🔽 Enabled services Summary Data: 🔽 Enabled you require Detailed Coded Record: 🔽 Enabled Demographics: 🔽 View 🔽 Auto Update Pharmacy Nomination View Vpdate <u>0</u>K <u>C</u>ancel <u>H</u>elp
- 2. Tick Enable Vision Online Services to enable patient online services.
- 3. You now need to configure your global settings:

Setting your Global Configuration

Configure.. 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.

<u>F</u>	See Using the Message Editor on page 50 or or ormatting HTML Messages on page 51 for details.
Enter your Welcome message here	Web Browser Welcome Registration Welcome Message: Source Arial B I U Image: I

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 unactivated 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:

1	Vision Online Services G	lobal Configuration		X
	Welcome	Registration	NHS Mail]
	Invalidate unused Registr Invalidate Un-activated a		30 days 30 days	
	Reminders	minders by Email every 1	day(s)	
		<u>0</u> K <u>C</u>	ancel <u>H</u> elp	

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.

'n

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

Yision Online Services		×
- Global		
Enable Vision Online Services	Configure	

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 <u>RBAC Help</u> 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:

	Yision Online Services
	Global Enable Vision Online Services Configure Configure
Tick Appointments to enable	Services Appointments: Enabled Configure
io chubic	Prescription: Repeat: Enabled Configure

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:

Yision Online Services Appointments Configuration	X
Web Browser	
Clinics Sessions Slot Types	
General Bookings Cancellations Staff	
Appointments Message	
Welcome Message: English	
Source Arial	
DNAs	
Display DNAs to patient	
Prevent access to VOS after this many DNAs 5	
Check DNAs in this range	
	μ
<u> </u>	
 Display DNAs to patient Prevent access to VOS after this many DNAs Check DNAs in this range 	

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.
- 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:

Vision Online Serv	ices Appointme	nts Configu	ration		ļ	×	
	Sessions		ot Types				
General Appointments Me	Bookings ssage	Lanci	ellations	Staff			
Source B I U	Arial]		
	tact the practic nt due today.	e if cancell	ing an		Ent Appo messo		nents
DNAs				v			
	NAs to patient coess to VOS after	this many DN	As 5 🕂				
	CDNAs in this range		1 year				
		<u>o</u> k	<u>C</u> ancel	<u>H</u> el	lp		

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

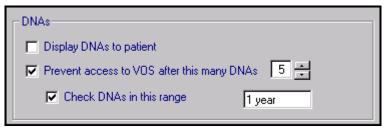


case of a query regarding booking or cancelling an appointment please contact the surgery in the usual way'

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

Clinics	Sessions	Slot T	ypes	
General	Bookings	Cancella	tions	Staff
Maximum Outstandi	ng Appointments Allo	owed	10	
How far in the future	e can appointments l	be booked ?	90 days	
🔽 Allow Weekend	Bookings ?			
🔽 Display Appointr	ment Duration ?			
🔽 Send Email Boo	king Confirmation ?			
Send SMS Book				
Send Email Rem	-		1 day	before
Send SMS Rem			1 day	before
Allow patients to	submit a reason wit	h their booking	, .	Derore
	for booking for exist			
Allow Reas	on to be edited ?			

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:

<u>ir</u> r	Vision Online Servio	es Appointments	Configuration	×
We	b Browser			
	Clinics	Sessions	Clash Turner	
			Slot Types	
	General	Bookings	Cancellations SI	taff
	How close can app	ointments be cancelle	ed ? 00 hours 00 mins.	
	🛛 🔽 Send Email Car	cellation Confirmation	1?	
	📃 Send SMS Can	cellation Confirmation	?	
	Cancellation Rea:	sons		
	Double Click the r	cancellation reason to	adit the MOS texts	
		ion Text	VOS Text	1 * 1
		OTHER GP / TIME		
	MOVED TO	OTHEN GE7 TIME	MOVED TO OTHEN GF 7	
	· ·			

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:

Cancellation Reasons	edit the VDS text :	
Vision Text	VOS Text	
PROBLEM RESOLVED	PROBLEM RESOLVED	
MOVED TO OTHER GP / TIME	Appointment re-arranged	↓ ↓
PATIENT DIED	PATIENT DIED	
☑ TRANSPORT ISSUES	TRANSPORT ISSUES	
1		

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

Yision Online Services change VOS Text				
Vision Text				
MOVED TO OTHER GP / TIME				
VOS Text				
Appointment re-arranged				
				- 1
	<u> 0</u> K		<u>C</u> ancel	

- 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.

(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:

Cancellation Re	asons				
Double Click the	cancellation reason to	edit the	VC	OS text :	
V	ision Text			VOS Text	
PROBLEM	RESOLVED	PROBL	E k	A DECOLVED.	
TRANSPO	RT PROBLEMS	TRAN:	1	Enable	Ŧ
NO REASC	IN GIVEN	NO RE		Set Default	
MOVED 1	O OTHER GP 7	Appoin		Move Up	
				Move Down	



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:

-Retu	In Appointments for Staff Members
✓	All Staff
Γ	Usual GP
	Salaried GPs

• 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**:

Yision Online Services Select Staff Member				
Earth, Mel				
	<u>0</u> K	<u>C</u> ancel		

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



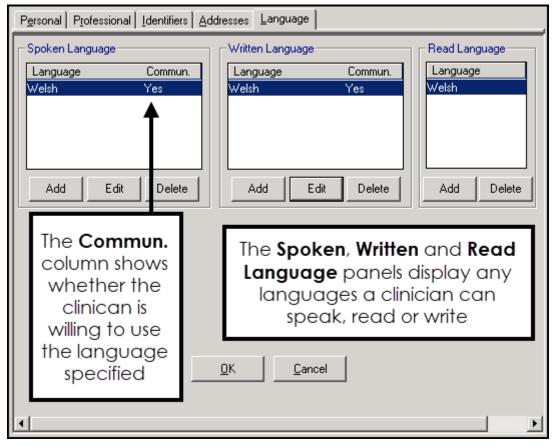
Adding Gender, Special Interests & Language

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 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:

<mark>ا ار</mark>	ision Online Servic	es Appointments (Configuration		X
Web	Browser				
ſ	General Clinics	Bookings Sessions	Cancellations Slot Types	Staff)
	Return Appointmen				
		-			

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

Y Vision Online Services Select Clinic					
FLU					
	ок (Cancel			
			1		

- 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:

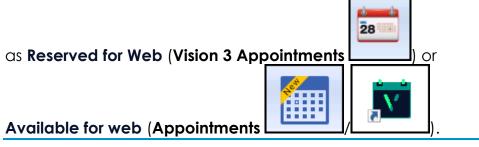
- 1. From Vision Online Services Appointments Configuration screen, select the Clinics tab.
- 2. Highlight the clinic to remove.
- 3. Select **Remove**.
- 4. You are prompted 'Are you sure that you want to remove (name of clinic) from the list?', select **Yes** to remove.



Sessions Tab

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

Yision Online Servio	es Appointme	ents Configu	ration		×
Veb Browser					
<u> </u>	Y				
General	Bookings		ncellations	Staff	
Clinics	Sessions	Slot	Types		
- Set Session Locat	ione				
Session (Double		to edit its loca	ation) :		
2.30 - 6.00 @ T			story.		
2.30 - 6.00 @ T	he INPS Practice	е			
9.00 - 12.30 @ 3					
afternoon @ Th am @ The INPS				-	
	riacuce				
- Sites:					
Notes Held at Sit	e: The INPS	Practice		-	
	,				
Return Slots fro	om:				
🔽 🔽 All Sessio	ns				
		Add	R	emove	
		<u>o</u> k	<u>C</u> ancel	Help	1
Note - Slot	s are not a	nvailable	online u	ntil thev c	nro marke
- INDIE - 3101					





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:

۲	Vision Online Servio	ces Appointmen	ts Configuration	x
We	b Browser			
ſ	General	Bookings		Staff
-	Clinics	Sessions	Slot Types	
		T .	VOC T I	— II
	Visior	n lext	VOS Text	
	Blank		Blank	
	Normal		Normal	
	Emergency		Emergency	
	BOD		Book on the Day	
	MS		Minor Surgery	
	Phone		Phone	

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

Y Vision Online Services change VOS Text					×
Vision Text					
MS					
VOS Text					
Minor Surgery					
			1		
		<u>o</u> k		<u>C</u> ancel	

- 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':

Online Appointments					
Do you wish this patient to use Online Appointments					
Yes	No				

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:

🖷 System Constants 🛛 🔀
Practice Bookings Defaults Backup Slot Count Reminders Patient Info
Practice Working Day
Include Saturdays 🔲 Include Sundays 🗌
Afternoon starts at: 13:00 Hide Users With No Sessions
Optimisation
Generate blank slots
Refresh after 1 min(s) of inactivity
Allow override of held slots by users with administrator rights
<u> </u>

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

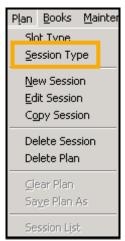
Note - If your screen does not refresh regularly, you may find that when selecting a slot to book, the slot appears as free on your screen, however, if it has been booked at a branch or online, you cannot proceed with the booking.



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**:

💐 Session Types	×
Description	Session Type
AM Surgery - Branch	Clinical
AM Surgery - Main	Clinical
Clinic	Clinical
PM Surgery - Branch	Clinical
PM Surgery - Main	Clinical
Add Edit	Delete Close

2. Change the text in **Description** as required, select **OK** to save and close:

🖷, Edit Session Type 🔀					
Description Clinical	PM Surgery - Main ▼				
	<u> </u>				

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**:

Appointments	
Confirm your booking The VOS02 Practice Wed 9 Sep 2015 2:00 PM 2:00 PM for 10 minutes With Dr Travel Clinic Gender: Female Reason for the appointment (optional	D
Please choose a country	
 Afghanistan Åland Islands Albania Algeria American Samoa 	
1000 characters left	Please note that practice staff other than the clinician may read this

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:

💐 Define Ses	sion				×
Туре	Clinic		Clinical	•	<u>0</u> K
Type Owner Description	NURSE PRE	SCRIBER	•		<u>C</u> ancel Distribute Slots
Description	Travel Clinic				
Default Sta	rt	09:00			
Default Star Duration Slots Per He Active Colour Text Colour		60 mir	ns.		
Slots Per H	our	6	•		
Active					
Colour					
Text Colour		 White 	🔿 Blac	k	
Travel Clini	c 🔽				



- 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:

🐂 Add Slot Type	x
Description Warning Message	
Number of days th booked prior to ap	
Colour	
Non-Bookable	
Non-Viewable	
Web Default	
	<u>OK</u> <u>C</u> ancel



 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**:

CLINIC
AM
Reserved for web

- 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:

💐 Slot	: Distrib	oution		x
	Time	Туре	Web	Slot Type
1	14:30	Emergency		Normal 🗾
2	14:40		Yes	
3	14:50	BOD		
4	15:00			Duration 210
5	15:10	Phone		Slots Per
6	15:20		Yes	Hour 6
7	15:30	BOD		
8	15:40			Outstanding Blanks
9	15:50		Yes	
10	16:00	Phone		
11	16:10			Arrange
12	16:20	BOD		
13	16:30		Yes	C <u>u</u> stom
14	16:40			
15	16:50	Phone		
16	17:00		Yes	
17	17:10	BOD		
18	17:20		Yes	
19	17:30			<u>O</u> k
20	17:40	Emergency		
21	17:50	Emergency		<u>C</u> ancel

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**:

CLINIC	
AM	
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:

Reserve For Web - all sessions				
Start Date Selected Sk	28/09/2011	End Date	22/06/2012	
Session 3.00 - 12:30 9.00 - 12:30	Date\Tim 11:30:00 11:40:00	ie Owner CS CS	Reserve the selected slots for all instances of their session in the selected time range reference instance Only if the owner of the session instance is the same as the owner of the selected slot	
Edit Session OK Cancel				

- 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 items selected

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
- 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 (<u>https://help.cegedim-healthcare.co.uk/Appointments_new/content/home.htm</u>) and the Appointments Setup Help Centre (<u>https://help.cegedim-healthcare.co.uk/Vision_Appointments_Setup/Content/Home.htm</u>) for further details.

Slot types



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:

Yision Online Services Prescriptions Configuration	×
Web Browser	
General	_
Prescriptions Message:	
Source Arial	
BIU A HEE 第第	
Please allow 48 hours before collecting your	
prescription	
Add your	
message here	
Thesage here	
- History	
Show request history up to 3 🗧 months	
Patient Message	
Allow patients to submit a free-text message with their requests	
<u> </u>	

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):

History Show request history up to 3 + months	
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:

Patient Message ✓ Allow patients to submit a free-text message with their requests
Tick to allow patients to submit messages with their medication requests

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





Define Old Repeat Offset

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

To change the Old Repeat Offset:

- 1. From Management Tools Control Panel 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:

	Overdue Offset	DueOffset	Default Read Code	OK
12 months	0 years	2 weeks	8B3S.00-Medication review	Cancel
Date Offset Limit				Help
13 months				
Repeats				
Old Repeat Offset	Repeat Limit	Repeats Interval	Repeat Dispensing Warning Days	
4 months	366	28 days	10	
E Enable Inaciivaii	Reactivation Reason	🗹 Enable Repeat D	ispensing	

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.

'n

- 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:

🛤 Read Term - Add	🔲 ОК	X Cancel
B1B00 Patient registration data verified		

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

H _k History - Add	Ω Recall SIOS SAnother G OK X Cancel 7 Help
Event Date: Clinician:	Private
13 July 2015 User, Dr Vision	▼ In Practice
Read Term for Characteristic:	
91B00 Patient registration data verified	
Comment:	Type of Characteristic: Episode Type:
1	▲ Administration
	*
Priority: End Date:	

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 Registration, select the patient required, select the Online Services tab and then select Identification:

Registration Details	×
🗖 Incomplete Details 👘 Incomplete RegLinks	
Pers <u>o</u> nal Addre <u>s</u> s Registration <u>N</u> otes Oth <u>e</u> r I <u>d</u> s Family FP <u>6</u> 9 <u>C</u> onsent Online Services <u>P</u> references	
Account Status Preferred Email Address:	
	✓ Verify Add
Preferred SMS Number:	
No Selection	▼ Verify Add
	Identification
© Created C Registered C Active C Locked	Reprint Account Details
	Reset Online Account

or,



Consultation Manager Consultation Manager, select the patient required, select List and then select Identification:



1. The Identification Type screen displays:

ication Type		(ANDER ALAN (567683)	3140]	
Date	Туре	User	Text	
27/07/2017 27/07/2017	Passport Driving Licence	Ms Jane Receptionist Mr System Supervisor	No 123456789	
	Add	Edit	Delete	Close

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

Identification - Ad	ld
Date:	06/07/2015
Туре:	Bank Statement
Staff:	Macd, Mrs D
Freetext:	
	OK Cancel

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:



- 1. From **Consultation Manager** 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:

H _x History - Add	Ω <u>R</u> eca	i 😤 jos 🗋 🗋 Anx	other 🔒 OK	X Cancel ? Help
Event Date: 15 June 2017		n for Characteristic: Electronic record notes su	mmary verified	
Comment	Type of Characterigtic: Administration	Episode Type: Other	Priority: Egy	d Date:

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.

M

- 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 <u>Setting Patient Consent</u> and <u>DCR Review App</u> 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.

'n

- 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:

Communication - Audit Trail	×
Contact : update_by_patient@email.com	
Type of Contact : Email	
Verified Valid Period	Close
From : Until :	
Changed on 13/05/2017 at 8:20 Changed on 13/05/2017 Automatic at 8:20 Changed on 13/05/2017 Changed on 13/05/2017 Changed Changed on 13/05/2017 Changed Change	0.07am by ROSU 💌 >>

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).

Гſ

• 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:**

Pharmacy Nomination View Update	English - Pharmacy Nomination options		
Pharmacy Nomination View	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:

	🖼 Vision Online Services Global Configuration 🛛 🔀
Language	Web Browser Welcome Registration NHS Mail
option only a∨ailable in Wales	Welcome Message: English Source Arial B Z U A Image: Source Image: Source
	Welcome to the Visionary Healthcare Practice The Visionary Healthcare Practice has four full-time doctors: Dr Carol Saturn; Dr Fiona Venus, Dr Michael Neptune and DR sarah Jupiter. We have been a training practice since 1996 and we often been existent dectored by the carotice of the carotice.
	<u> </u>

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

- Welcome Message: English 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.
- BIU 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, .

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.</h6></h1></h6></h1>
		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