Preparing for your Online Patient Services Practice Merge

In order for your Patient Services practice merge to be as seamless as possible, you need to ensure the following:

Four weeks or more before the merge takes place

Decrease how far in advance appointments can be booked.

- **Merging practice closing their doors** - Well in advance of the merge, you should start to decrease how far in the future an appointment can be booked to ensure appointments past the merge date are not made available. This can be done using:
  - **Appointments - Maintenance - Book owners**:
    - **For Vision 3 Appointments** - See Edit number of weeks ahead or owner name in the **Vision 3 Apppointments** on-screen help (https://help.cegedim-healthcare.co.uk/Legacy_Appointments/index.htm#38800).
    - **For Appointments Setup** - See Owner Extensions – Edit Extension Timescales.in the **Appointments Setup Help Centre** (https://help.cegedim-healthcare.co.uk/Vision_Appointments_Setup/Content/G_Full_Help_Topics/6_Owner_Extensions/Owner_extensions_Update_Weeks.htm) for details.
  - **Appointments - Extend Books -** Stop using the **Extend** books option.
  - **Appointments - Manual removal of Sessions** - Simply remove any sessions passed the merge date:
    - **For Vision 3 Appointments** - See *Remove Session* in the **Vision 3 Apppointments** on-screen help (https://help.cegedim-healthcare.co.uk/Legacy_Appointments/index.htm#39096) for details.
    - **For Appointments Setup** – See Delect Sessions in the **Appointments Setup Help Centre** (https://help.cegedim-healthcare.co.uk/Vision_Appointments_Setup/Content/G_Full_Help_Topics/9_Sessions/Delete_Sessions.htm) for details.

Two weeks before the merge takes place

Publicise the Merge

- You should publicise the merge to your patients, advising that there may be a slight disruption to their online services during the merge period:
  - You should update your welcome messages, see Adding a Welcome Message in the **Patient Online Services Help Centre** (https://help.cegedim-healthcare.co.uk/patient_online_Services_Help_Centre/Content/G_PFS_Full_Help_Topics/Enabling_Patient_Online_Services/Enabling_Patient_Online_Services.htm#Welcome) for details.
  - Publicise the merge within the surgery itself.

Stop Registering Patients for Patient Services

- **Full Registration (ROSU)** - You should stop registering any patients for Patient Services, the NACS code on the letter produced on registration becomes invalid once the merge has happened, so the patient will not be able to activate their account. We recommend that any patients registered in the run up to the two week cut off are advised to register as soon as possible to prevent a letter having to be reissued.

- **Basic Registration (OSU)** - You should disable this option to prevent any new Patient Services accounts during the merge period, see Enabling Online Service Users (OSU) in the **Patient Online Services Help Centre** (https://help.cegedim-healthcare.co.uk/patient_online_Services_Help_Centre/Content/G_PFS_Full_Help_Topics/Enabling_Patient_Online_Services/Enabling_A_Basic_Online_Services_Account.htm) for details.

Decrease how far in advance Appointments can be booked.

- **Merging practice remaining open** - Appointments are still available here after the merge, but they have to be transferred manually. We therefore recommend you do not allow patients to book too far in advance as this increases the amount of work your staff has to do post merge. Appointments must be disabled completely the day before the merge.

One week before the merge takes place

Disable Patient Services Prescription Requests

- You should disable both repeats and acutes requests completely and ensure that all existing prescription requests in Mail Manager are processed fully before the merge date as these are not merged and may be lost, see Enabling Online Prescriptions in the **Patient Online Services Help Centre** (https://help.cegedim-healthcare.co.uk/patient_online_Services_Help_Centre/Content/G_PFS_Full_Help_Topics/Enabling_Patient_Online_Services/Enabling_A_Basic_Online_Services_Account.htm) for details.

The day before the merge takes place

Stop making Appointments

- You should not book any appointments.

Disable all remaining Patient Services functionality

- From **Management Tools - Control Panel - Online**, simply remove the relevant ticks:
    - **Patient Messaging**
    - **Summary Data**
    - **Detailed Coded Records**
    - **Demographics**
    - **Pharmacy Nomination**

Update your Global Welcome Message

- From **Management Tools - Control Panel - Online**, select **Global - Configure** and update the message to advise your patients that the service is temporarily unavailable whilst the merge takes place, see Enabling Patient Online Services – Welcome Message in the **Patient Online Services Help Centre** (https://help.cegedim-healthcare.co.uk/patient_online_Services_Help_Centre/Content/G_PFS_Full_Help_Topics/Enabling_Patient_Online_Services/Enabling_Patient_Online_Services.htm#Welcome) for details.