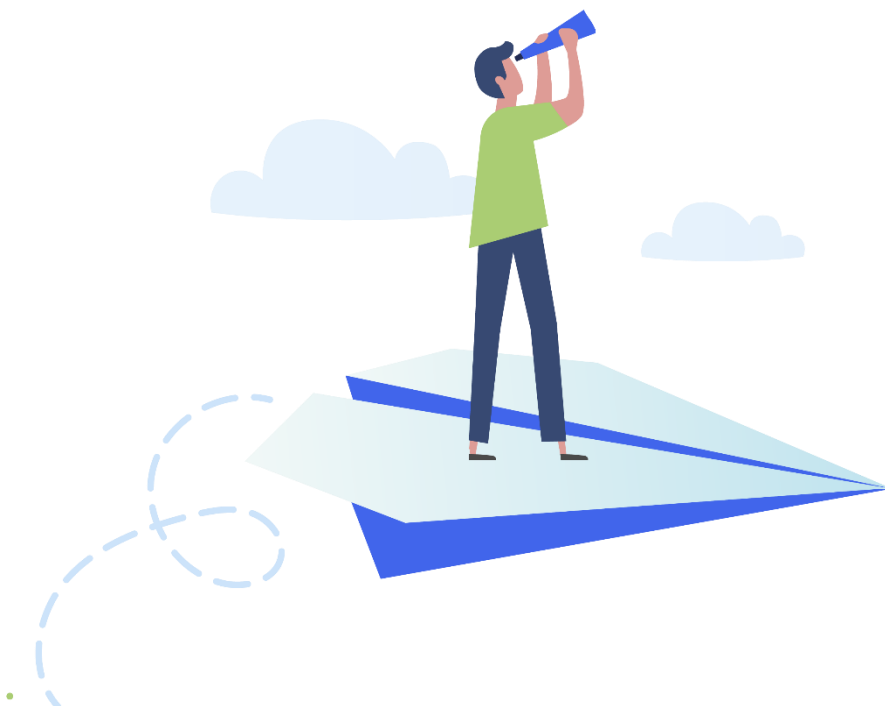


Organisation Services User Guide

Version 2.1

28th June 2023



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Welcome to Organisational Services

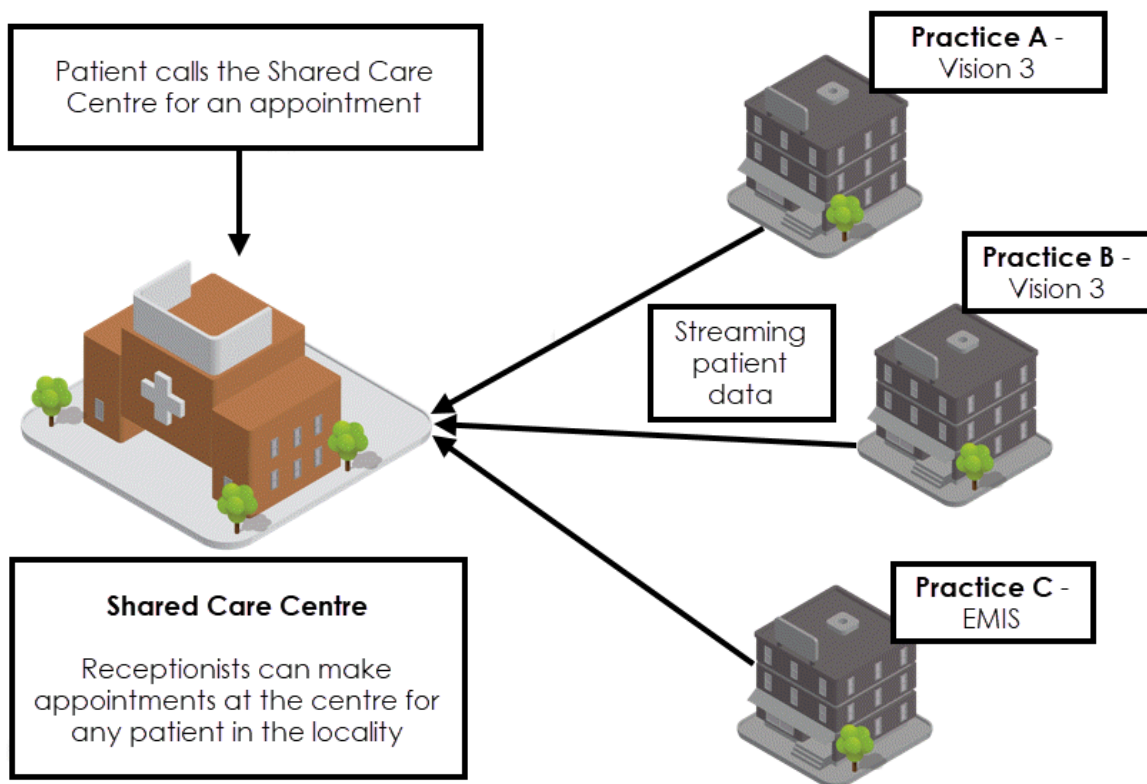
Organisational Services is designed to support Shared Care Services by allowing you to view and manage:

- **Users** - Creating users, resetting passwords and unlocking accounts.
- **Services** - Viewing organisations you have data sharing agreements with.

The **Shared Care** applications support cross-organisational access to data shared between different healthcare providers across multiple care settings, for example:

- A GP led service which includes services to all patients in a Primary Care Network (PCN) or Health Board.
- An out-of-hours service shared by a geographically defined group of practices.
- Community District Nursing teams.

A typical Shared Care Service is an extended hours service in a locality of GP practices:



Prerequisites

The following are the minimum requirements for **Organisational Services**:

Dependency	Version Required
Windows Desktop	Windows 7, 8.1 or 10
Browser	Microsoft Edge
N3	Access must be via a secure N3 connection, a token is needed for remote use.
Access requirements	Vision360 user name and password. Your user name is your NHS Mail email address. For Vision 3 users your password is your existing password, for English sites this is your offline password.



See [Logging in to Organisational Services](#) on page 6 for details.

Logging in to Organisational Services

Organisational Services is accessed from **Vision360**. To log into **Organisational Services**:

1. From your desktop, select **Vision360**, or open your browser and enter the url web address provided by the **Cegedim Healthcare Solutions** implementation team.
2. The **Vision360** login screen displays:

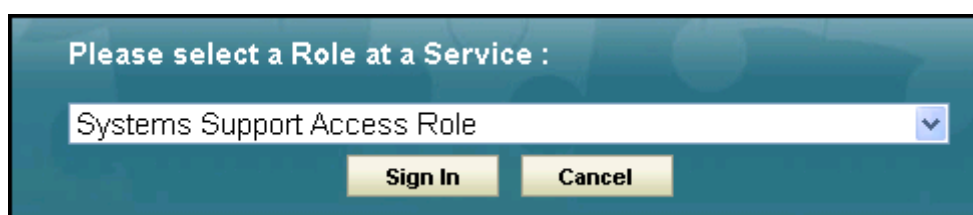


Enter your details in **User name** and **Password**.

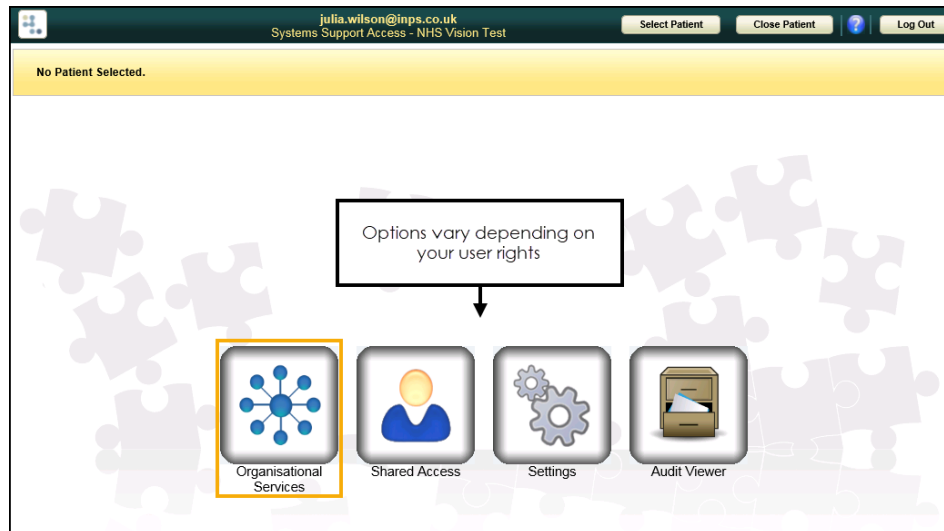


Note - Your **User Name** is your NHS email address, and for **Vision 3** users your password is your existing password, for English sites this is your offline password.

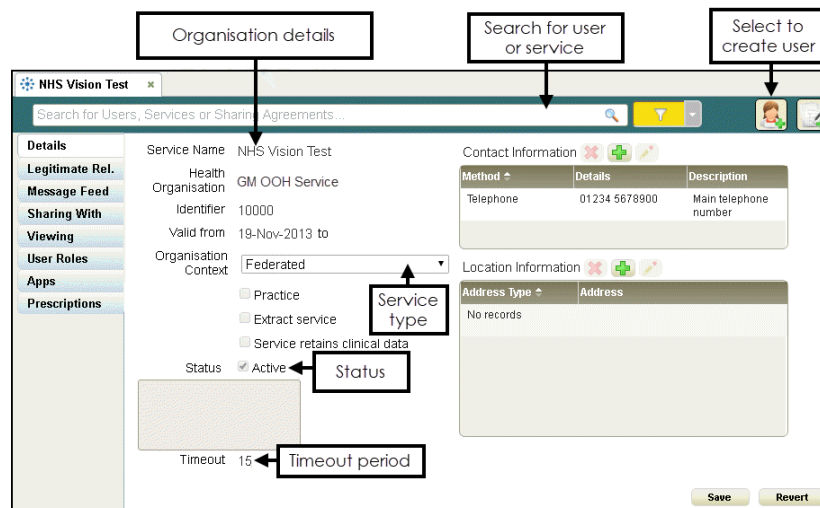
3. Select **Sign In**.
4. If you have more than one role, select from the available list, for administrative use, select **Systems Support Access Role**:





5. The **Vision360** home screen displays, the options available depend on your access rights:



6. Select **Organisational Services**.
7. The **Service Details** screen displays, from here you can:
- View services
 - Search for and depending on your user rights, maintain users:

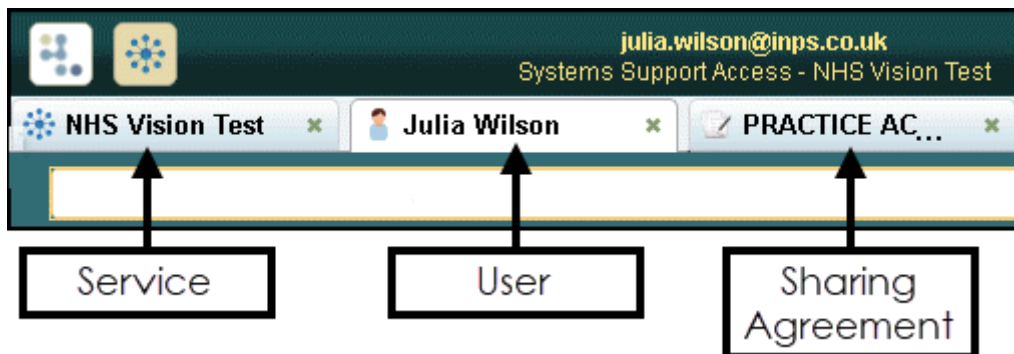


 **Note** - If you log in as a user, not a System Administrator, the **User Details** screen displays.

 See **Service - Overview**, **Searching for Users, Services and Sharing Agreements** on page 9 and **Navigating Organisational Services** on page 8 for details.


Navigating Organisational Services

Organisational Services consists of three screens, accessed from tabs at the top of the **Organisational Services** screen:




-  **Service** - Enables System Administrators to view the Shared Care Service details along with associated organisations and manage staff access.



➔ See [Service Management](#) on page **30** for details.

-  **User** - Enables:
 - System Administrators**, to manage staff accounts.
 - General Users**, to reset their own password.

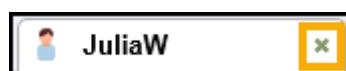
➔ See [Managing User Accounts](#) on page **10** for details.

-  **Sharing Agreement** - Displays any sharing agreements you are part of.

Select the relevant tab to display the screen required.

 **Note** - If you update a screen, without saving the changes, the tab displays an asterisk .

To close a screen, select **Close**:




➔ See [Logging in to Organisational Services](#) on page **6** and [Searching for Users, Services and Sharing Agreements](#) on page **9** for details.

Searching for Users, Services and Sharing Agreements


The **Organisational Services** search allows you to search for users, services and sharing agreements.

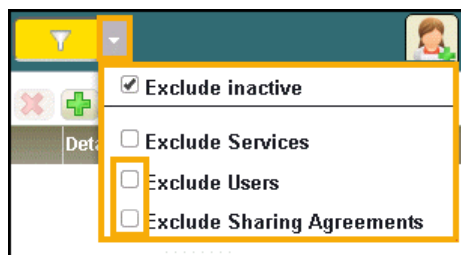
To search **Organisational Services**:

1. From **Vision360**, select **Organisational Services** .
2. The **Organisational Services** screen displays, in **Search**, enter the details of the search required, for example, the name of the staff member you are searching for:



Training Tip - A minimum of two characters are needed, you can also use ** for a wildcard search.

3. To exclude items from your search, select **Filter**  and tick those aspects you do not want to search on:



Note - **Exclude inactive** is ticked by default which means, by default, you only search on active records. To search on inactive records, remove the tick.

4. Select **Search** .
5. All matching results display, select the result required.



Note - If the item is already open in another tab, the relevant tab displays.



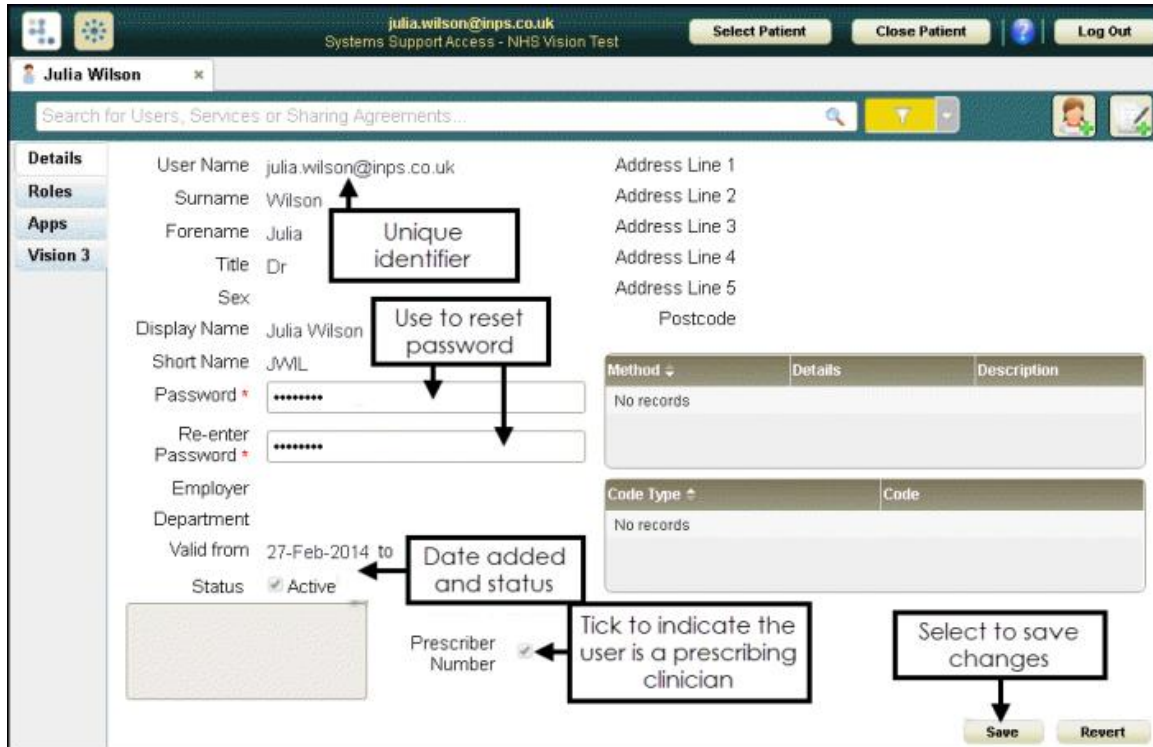
See **Managing User Accounts** on page 10 and **Service Management** on page 30 for details.

Managing User Accounts

User accounts can be viewed, set up and maintained from the **Organisational Services - User** screen.

The following tabs display depending on your user rights:

Details

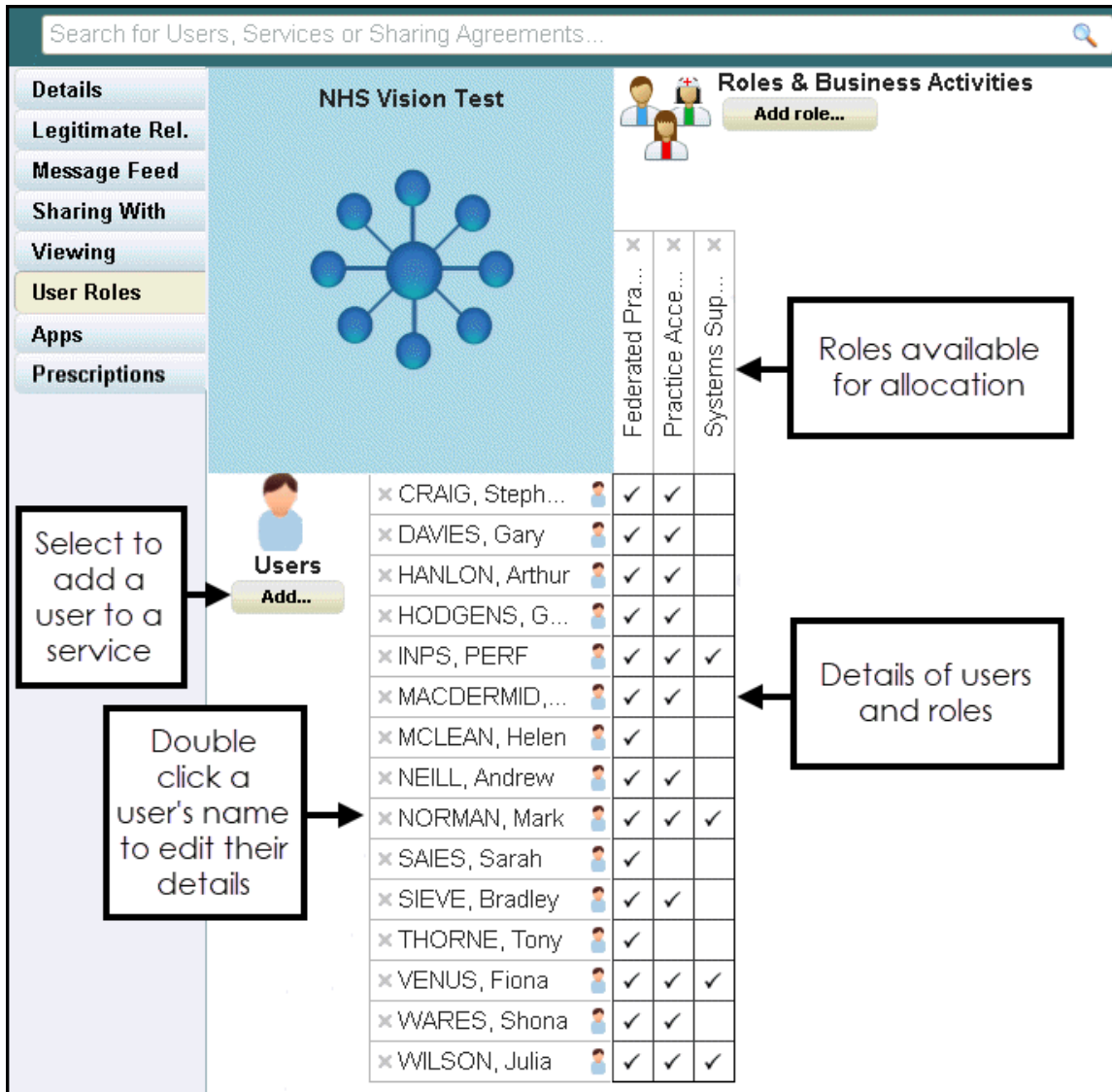


- **User Name** - Usually the user's NHS email address.
- **Surname, Forename, Title, Sex** - The user's name, title and gender information.
- **Display Name** and **Short Name** - The name that displays on screen and a short reference name.
- **Password** and **Re-enter Password** - See [Resetting a Password for a Shared Care User](#) on page 26 for details.
- **Employer Department** - Organisation and Department details where appropriate.
- **Valid from** - The date the user was set up or activated.
- **Status** - See [Inactivating a Shared Care User](#) on page 29 for details.
- **Prescriber Number** - Tick to indicate the user is a prescriber.



See [Creating a Shared Care User](#) on page 13 for details.

User Roles



Search for Users, Services or Sharing Agreements...

Details
Legitimate Rel.
Message Feed
Sharing With
Viewing
User Roles
Apps
Prescriptions

NHS Vision Test

Roles & Business Activities
Add role...

Users
Add...

	Federated Pra...	Practice Acce...	Systems Sup...
× CRAIG, Steph...	✓	✓	
× DAVIES, Gary	✓	✓	
× HANLON, Arthur	✓	✓	
× HODGENS, G...	✓	✓	
× INPS, PERF	✓	✓	✓
× MACDERMID, ...	✓	✓	
× MCLEAN, Helen	✓		
× NEILL, Andrew	✓	✓	
× NORMAN, Mark	✓	✓	✓
× SAIES, Sarah	✓		
× SIEVE, Bradley	✓	✓	
× THORNE, Tony	✓		
× VENUS, Fiona	✓	✓	✓
× WARES, Shona	✓	✓	
× WILSON, Julia	✓	✓	✓

Select to add a user to a service

Double click a user's name to edit their details

Roles available for allocation

Details of users and roles

- **Service Name** - The name of the service you are viewing
- **Users Add** - Select to add an existing user to a service and role.
- **List of Users** - The list of users that can use this service (going down the screen).
- **List of roles available** - The list of roles available for this service (going across the screen).

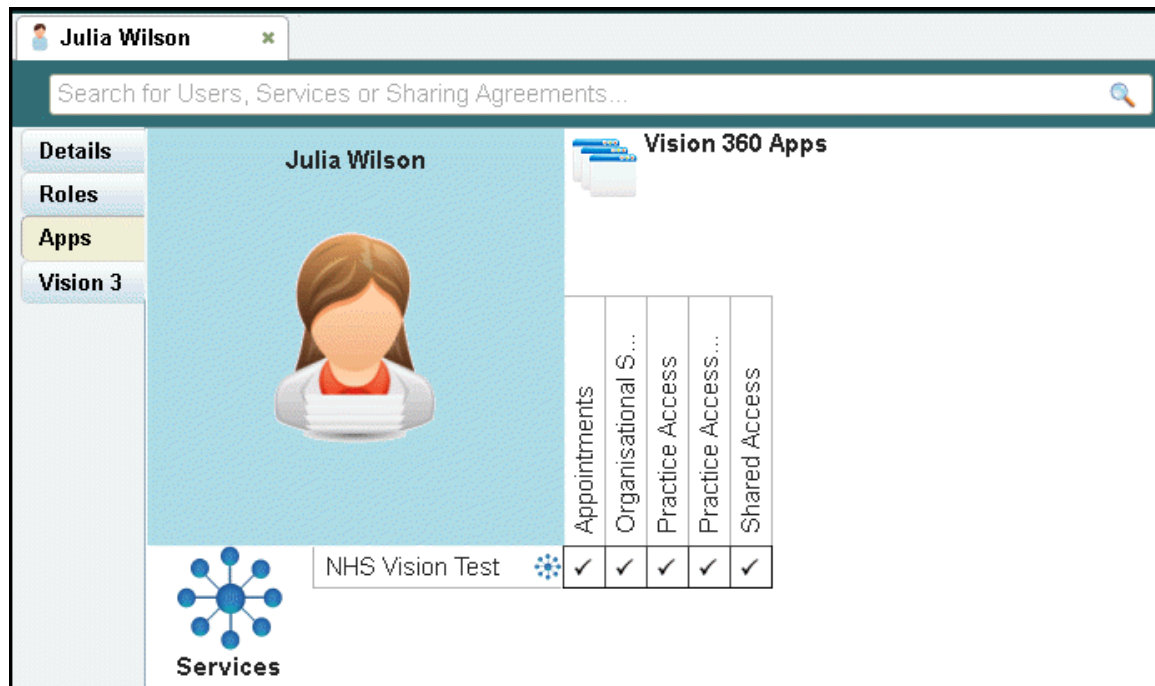


See [Allocating User Services and Roles](#) on page 36 for details.



Training Tip - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.

Apps

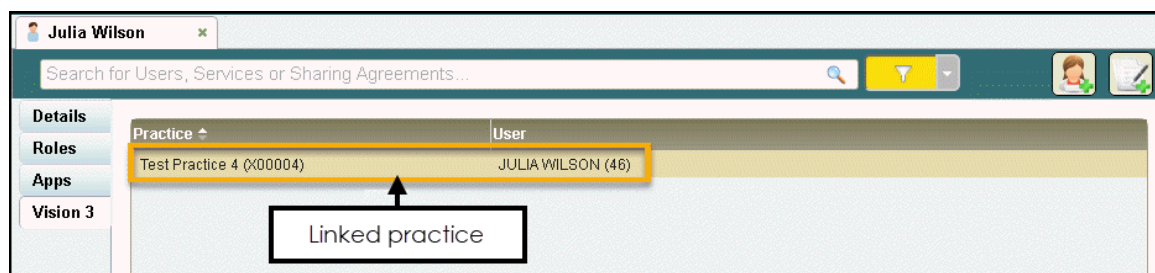


The **Apps** tab displays the **Vision360** applications that a specified user can access by organisation.



See [Viewing a User's Applications](#) on page 18 for details.

Vision 3



The **Vision 3** tab displays details of any **Vision 3** practice that a user is linked to.



See [Linked Vision 3 Practices](#) on page 21 for details.



See [Searching for Users, Services and Sharing Agreements](#) on page 9 for details.

Creating a Shared Care User

In order to use any **Cegedim Healthcare Solutions** applications in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

To create a user in **Organisational Services** and then add them to a service:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. Check to see if the user already exists, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details.
 - If the user exists, you can simply add the service required, see [Adding a User to an existing Service](#) on page 15.
 - If the user does not exist, they must be added, see [Create a User in Organisational Services](#) on page 13.

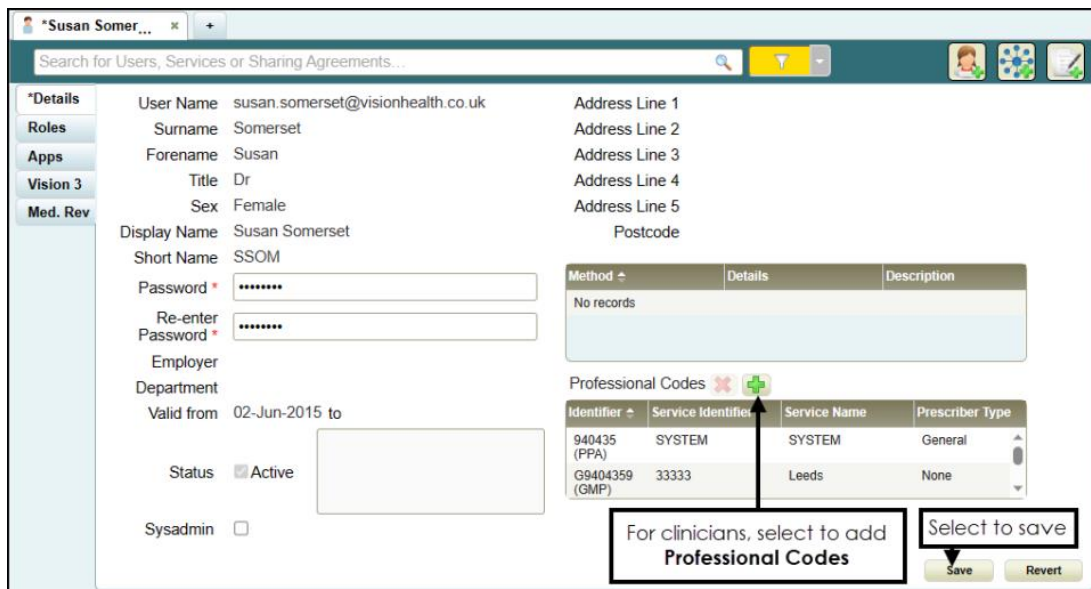
Complete the following as required:

Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details.




2. Select **Create User** and the new **Add User** tab displays:



Search for Users, Services or Sharing Agreements ...

***Details** User Name susan.somerset@visionhealth.co.uk Address Line 1
Roles Surname Somerset Address Line 2
Apps Forename Susan Address Line 3
Vision 3 Title Dr Address Line 4
Med. Rev Sex Female Address Line 5
 Display Name Susan Somerset Postcode
 Short Name SSOM
 Password *
 Re-enter Password *
 Employer
 Department
 Valid from 02-Jun-2015 to
 Status ☒ Active
 Sysadmin ☐

Method Details Description
 No records

Professional Codes 

Identifier	Service Identifier	Service Name	Prescriber Type
940435 (PPA)	SYSTEM	SYSTEM	General
G9404359 (GMP)	33333	Leeds	None

For clinicians, select to add Professional Codes

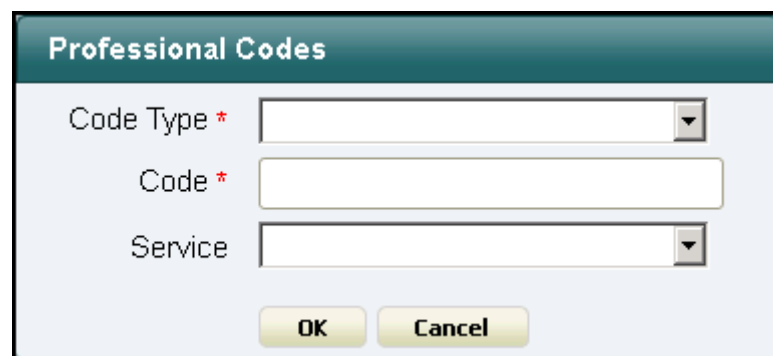
Select to save

Save Revert


3. Enter the new user's details, items marked with an asterisk * are mandatory fields:
 - The password must be a minimum of six characters and contain characters from at least three of the following categories:
 - Upper case
 - Lower case
 - Numbers
 - Non-alphanumeric characters: ~!@#\$%^*_+=`| \(){}[]:;'.?/
 - No spaces at the beginning or end of the password
 - The password must not contain three or more consecutive characters (case insensitive) from the user name, forename or surname.
4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:

Adding a Professional Code

- a. From **Professional Codes**, select **Add** , the **Professional Codes** screen displays:



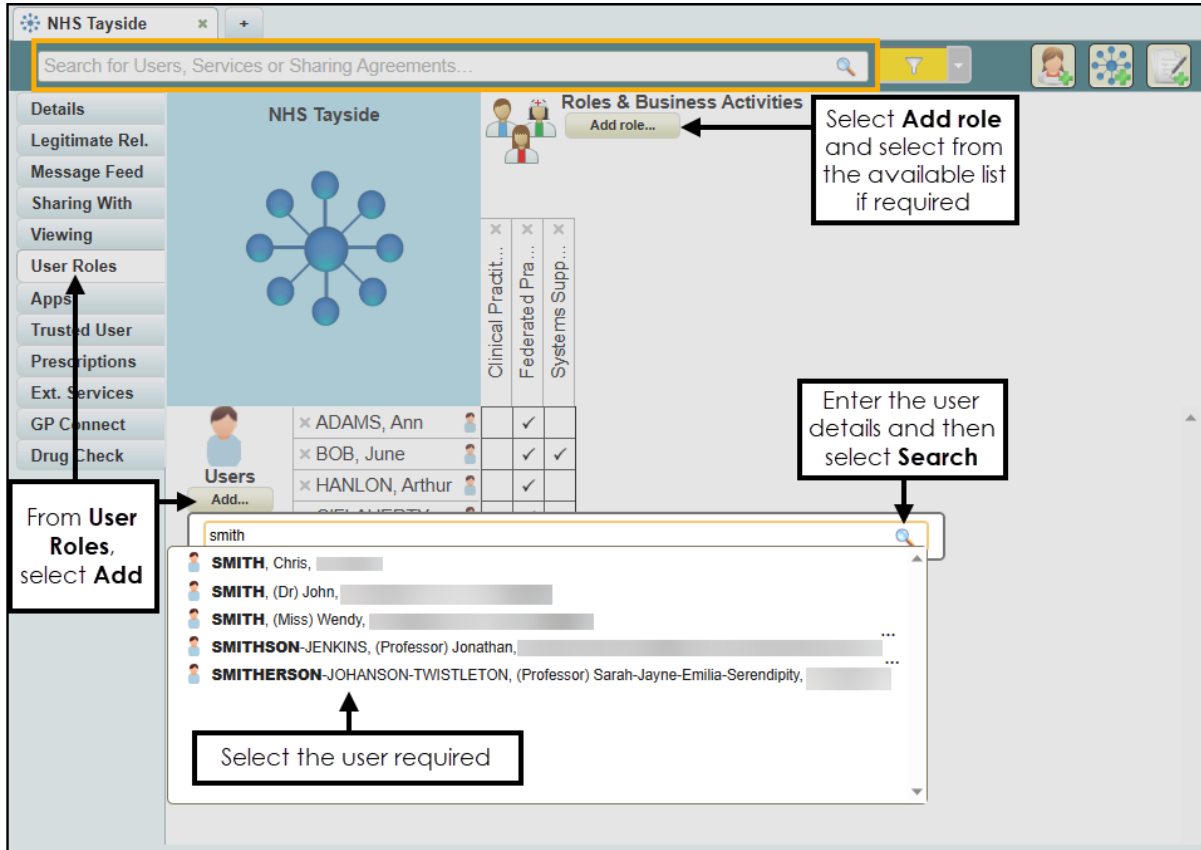
The dialog box titled "Professional Codes" contains three input fields: "Code Type *" (a dropdown menu), "Code *" (a text box), and "Service" (a dropdown menu). At the bottom are "OK" and "Cancel" buttons.

- b. Complete as required:
 - **Code Type** - Select the type of code to record
 - **Code** - Enter the code
 - **Service** - Select from the list of services available for this user.
- d. Select **OK**.
5. Select **Save** .


 **Note** - **Sysadmin** is for **Cegedim Healthcare Solutions** use only and so is marked **You cannot change this user's sysadmin status**.

Adding a User to an existing Service

1. Open the **Shared Care Service** view, if you have just created the user, this is open at the top of your screen.
2. Select **User Roles** and then **Users - Add**:



The screenshot shows the NHS Tayside system interface. The search bar at the top contains the text "Search for Users, Services or Sharing Agreements...". The sidebar on the left has a menu with "User Roles" and "Users - Add" highlighted. The main area displays a table of users with columns for "Clinical Predit...", "Federated Pra...", and "Systems Supp...". A search bar is visible below the table, and a list of search results is shown below that. Annotations with arrows point to the "Add role..." button, the search bar, and the user selection list.

3. Enter the user's details in the search bar and select **Search** .
4. Select the user from the results and the user is assigned to the shared care service.
5. Tick next to the user's name under the appropriate heading, to allocate their role. If required, select **Add Role** and select the role required for this user from the available list.



Note - To remove rights from a user, simply untick the box.



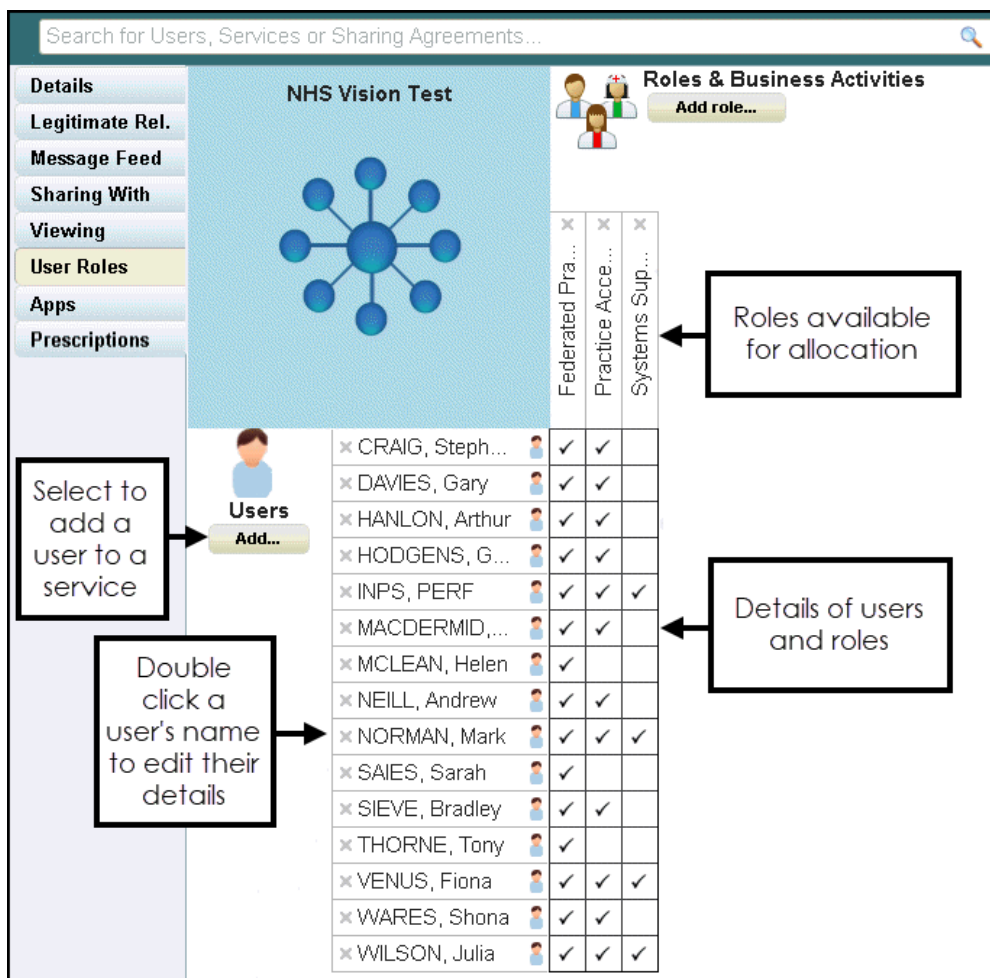
Training Tip - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.

Allocating User Services and Roles

Setting **User Roles** defines the access level and service type of a user, for example, the **Systems Support Access** role gives administration rights to be able to reset passwords, unlock and manage user accounts.

To allocate services and roles to a user:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. Find the user required, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details if required.
3. Select the **User Roles** tab:



Search for Users, Services or Sharing Agreements...

NHS Vision Test

Roles & Business Activities
Add role...

User Roles

Select to add a user to a service





Double click a user's name to edit their details

Roles available for allocation

Details of users and roles

	Federated Pra...	Practice Acce...	Systems Sup...
× CRAIG, Steph...	✓	✓	
× DAVIES, Gary	✓	✓	
× HANLON, Arthur	✓	✓	
× HODGENS, G...	✓	✓	
× INPS, PERF	✓	✓	✓
× MACDERMID, ...	✓	✓	
× MCLEAN, Helen	✓		
× NEILL, Andrew	✓	✓	
× NORMAN, Mark	✓	✓	✓
× SAIES, Sarah	✓		
× SIEVE, Bradley	✓	✓	
× THORNE, Tony	✓		
× VENUS, Fiona	✓	✓	✓
× WARES, Shona	✓	✓	
× WILSON, Julia	✓	✓	✓

4. To update a role to a user, select the service alongside their name, the following display:

-  - Role has default activities.
-  - Additional activity added.
-  - Activity removed.
-  - Activity removed, and activity added.

5. Select **Save** to save your changes, or **Revert** to cancel them.



Note - Available Roles and Services are maintained by the **Cegedim Healthcare Solutions** deployment team.



Training Tip - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.



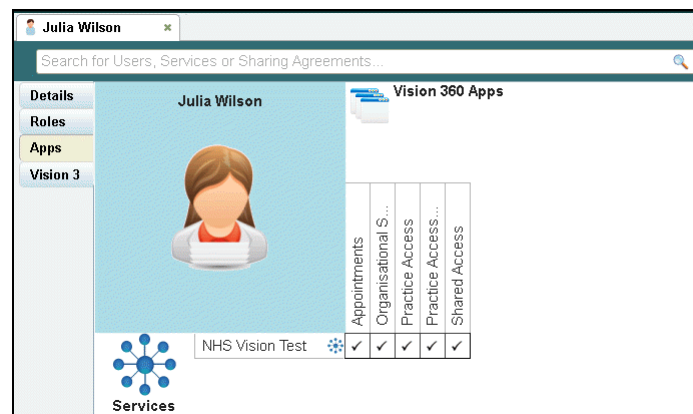
See **Service Management** on page **30** for details.

Viewing a User's Applications

The **Apps** tab displays the **Vision360** applications that the user can access by organisation.

To view the apps a user has access to:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. Find the user required, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details if required.
3. Select the **Apps** tab:



Training Tip - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.



See [Managing User Accounts](#) on page 10 for details.

Setting Up and Maintaining Business Activities

Business Activities are used to define what a user can, or cannot, access in the applications they use. **Business Activities** are set up and maintained from within **Organisational Services**.

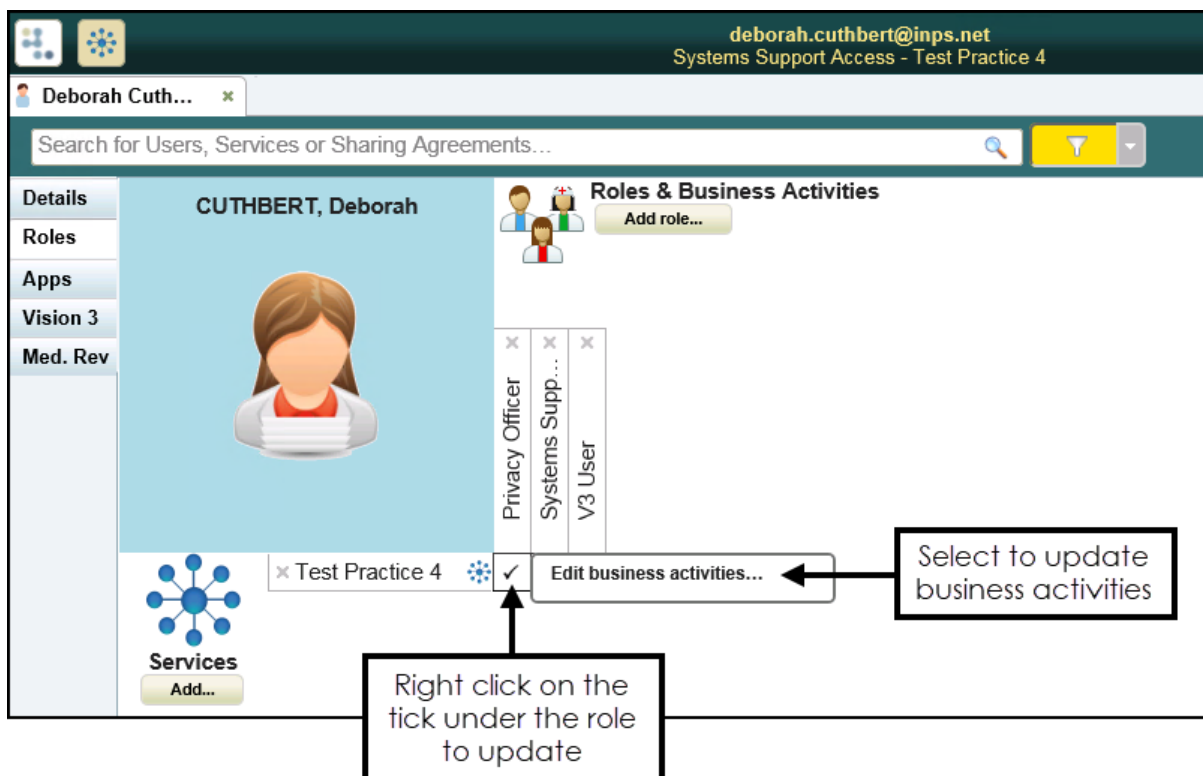
To set up or update **Business Activities**:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. In **Search**, enter the details of the staff member you require:

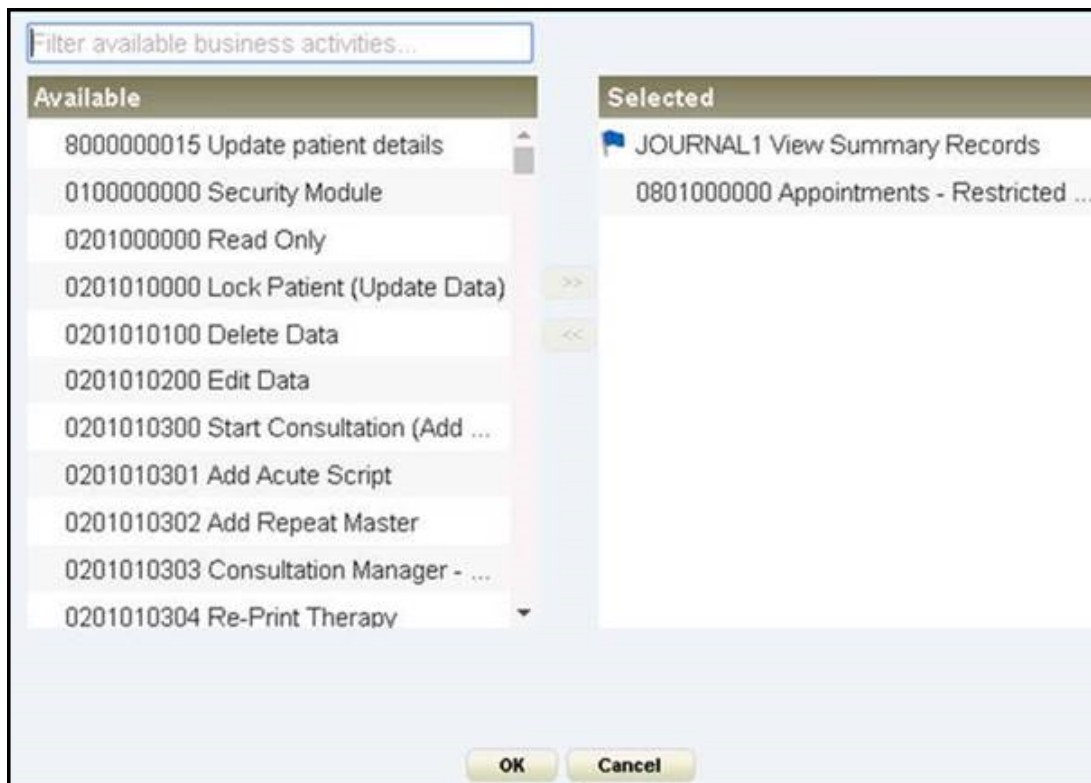


Training Tip - A minimum of 2 characters are needed, you can also use ** for a wildcard search.

3. Select **Roles**.
4. Right click on the tick under the roles to update and select **Edit business activities**:



5. The **Filter available business activities** search displays:



6. From **Available**, double click on all the business activities required.



Training Tip - System administrators must have **0100000000 Security Module** selected to access the secure aspects of applications, for example, receiving and allocating cross-organisation tasks in Tasks.

7. Select **OK** to save.



Training Tip - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.

Business Activities

Vision360 Business Activities are used to define what a user can, or cannot, access in the applications they use. **Vision360 Business Activities** are set up and maintained from within **Vision360 - Organisational Services**.

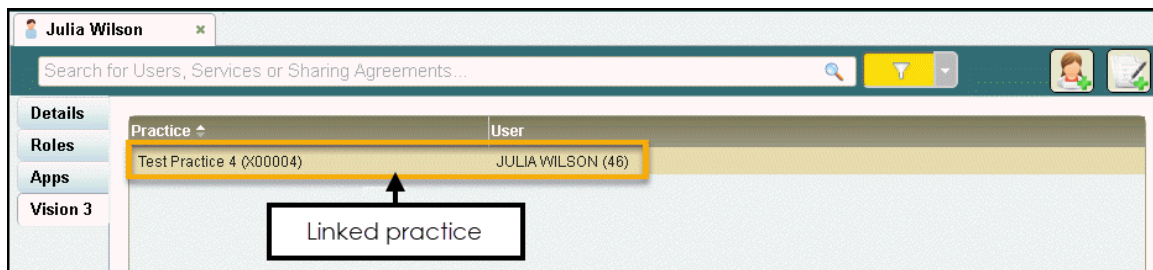
 See [Setting Up and Maintaining Business Activities](#) on page 19 for details.

Linked Vision 3 Practices

The **Vision 3** tab displays details of any **Vision 3** practice that a user is linked to.

To view the **Vision 3** practices a user is linked to:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. Find the user required, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details if required.
3. Select the **Vision 3** tab:




The email address and password for logging in to **Shared Care Services** import from **Vision 3** and should be maintained from there.

 **Important** - If the **Vision 3** password for a user is reset, it is also reset in **Vision360**.

 See [Setting up Users in Vision 3](#) on page 22 and [Managing User Accounts](#) on page 10 for details.

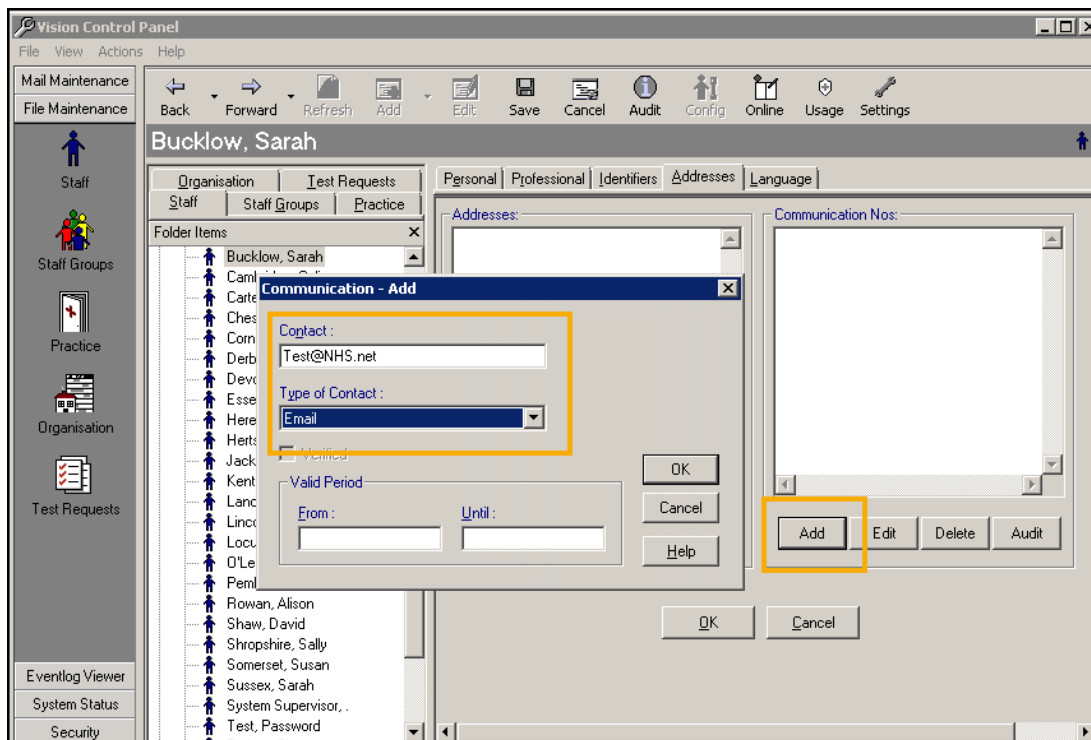
Setting up Users in Vision 3

Vision 3 users must have an email address set up in **Vision 3 - Control Panel** in order to log in to, and use **Vision360** and any **Shared Care Services** they are authorised for. The email address is used as their unique user name.

 **Note** - An NHS email address should be used. Every **Vision360** user must have a unique user name so shared email addresses must not be used.

To add an email address to **Vision 3**:

1. From the **Vision 3** front screen, select **Management Tools - Control Panel - File Maintenance**.
2. Select **Staff**.
3. From the **Staff** list, right-click on the staff member required and select **Edit Staff**.
4. Select the **Address** tab
5. Select **Add** under **Communication Nos**
6. The **Communication - Add** screen displays:



Complete as follows:

- **Contact** - Enter the users email address.
 - **Type of Contact** - Select **Email**.
8. Select **OK** to save the communication details.
 9. Select **OK** again to save the **Address** screen.

10. Repeat this process for every user who needs access to any Shared Care Service applications.



Note - It can take up to an hour for user details to transfer to **Vision360**.

For some **Vision360** applications users need to be added to the relevant services, for example, **Shared Appointments** or **Community**, see [Allocating User Services and Roles](#) on page **16** for details.

Note the following:

- If any staff member has more than one **Vision 3** user account, **ONLY** the preferred user should be updated with the email address. We recommend inactivating unused staff accounts, see [Inactivating a Vision 3 User](#) in the **Management Tools Help Centre** for details.
- If the staff member is set up in more than one practice with the same email address, the user credentials, for example, prescriber code, must be set up in each system otherwise this can cause issues. If the staff member has a different role, for example, non-prescribing in another practice, we recommend using a different email address.

Creating an EMIS User at Practice Level

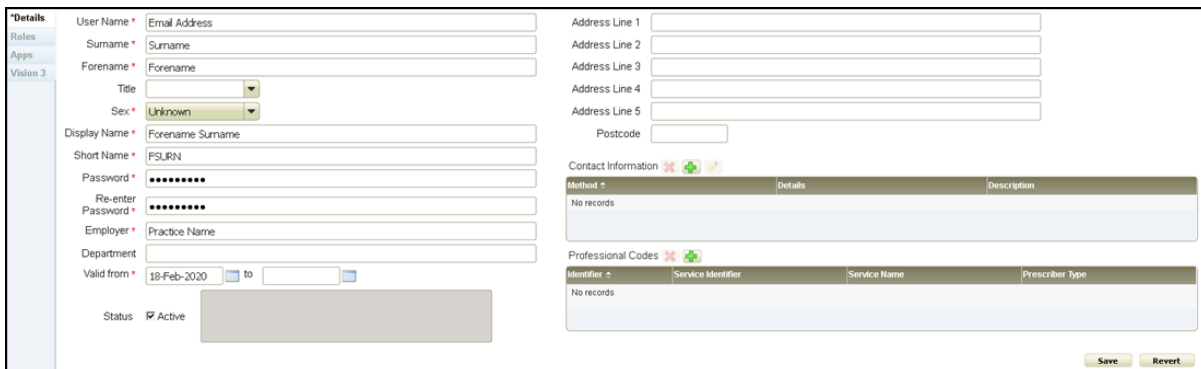
 **Note** - Before creating a new user run a search to ensure the user does not already exist, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details.

To create an **EMIS** User at your practice:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. Check to see if the user already exists, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details.





3. Select **Create User** and the **Add User** screen displays:



Complete as follows:


- **User Name** - Enter the users email address.
- **Surname** - Enter the user's surname.
- **Forename** - Enter the user's forename.
- **Short Name** - Enter the first letter of the users forename followed by the first 4 letters of their surname, for example, John Brown would be JBROW.
- **Password** - Enter a password for this user.
- **Re-enter Password** - Enter the password again to confirm.
- **Valid from** - Defaults to today, update if required.
- **Status** - Tick **Active**.


9. Select **Save**  to add the user.
10. Now, select your practice tab from the top of the screen and select **User Roles**.
11. From **Users**, select **Add** and then select the email address of the person you are adding.
12. Tick **Clinical Practitioner**.

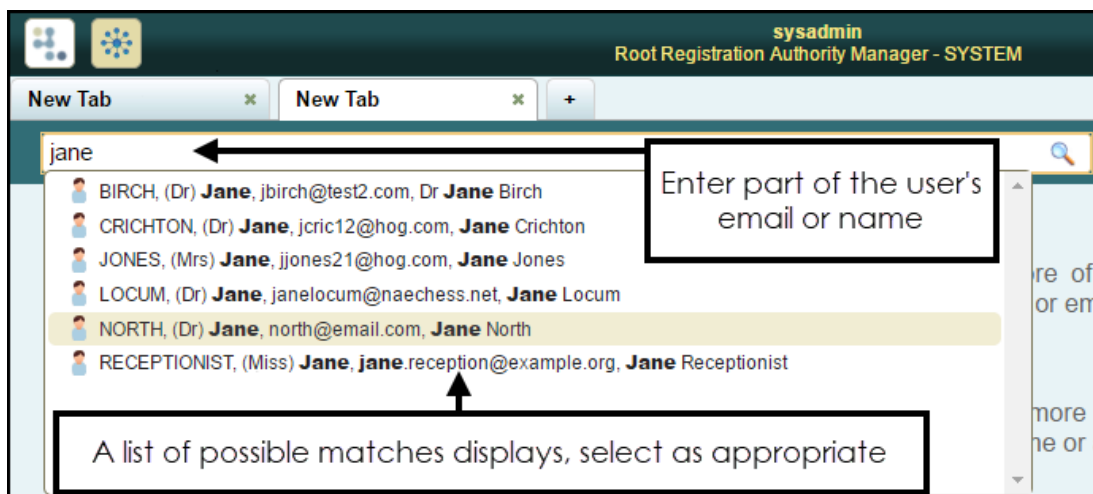
 **Note** - If you need federated permissions, you need to be elevated by the federation system support account user. You can have different roles depending on what role you need, for example, clinicians have federated practitioner and practice access (mobile) access roles, receptionists are set up as federated practitioners and then have business activities removed so they cannot have read/write access to patient records, see [Allocating User Services and Roles](#) on page 16 for details.

Resetting a Password for a Shared Care User

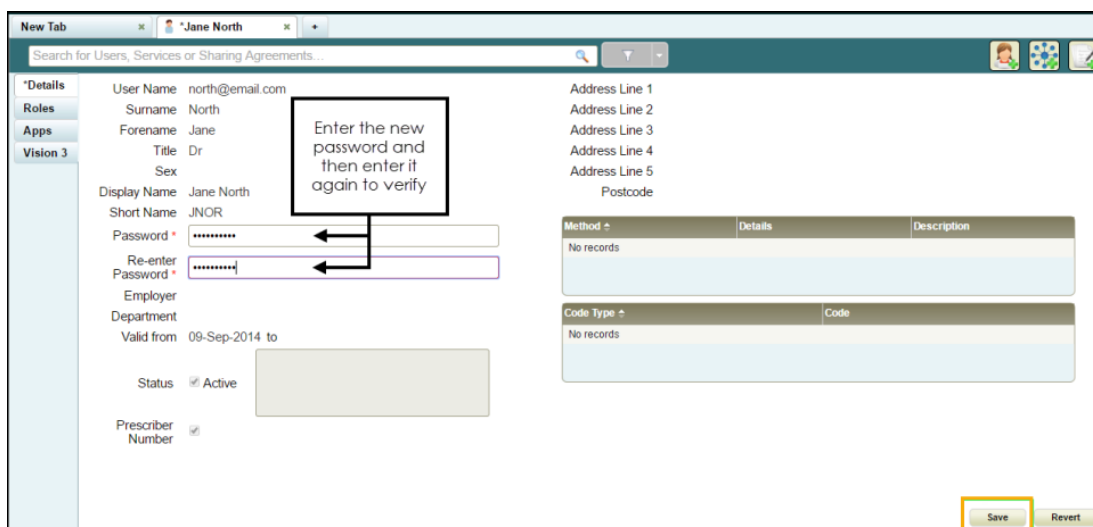
To reset a password for a Shared Care user:

 **Note** - If you are not a system manager, you can only reset your own password, if you are a **Vision 3** user, you must reset your password within **Vision 3**.

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. In **Search**, type part of the locked user's name or email and select **Search** .



3. All matching results display, select the user required.
4. The **Edit User** screen displays with the **Details** tab selected.
5. In **Password**, enter a new password.
6. In **Re-enter Password** enter the new password again to confirm:



7. The **Password Required** screen displays, enter your existing password and then select **OK** to confirm.

8. Select **Save** to save your changes, or **Revert** to cancel them.

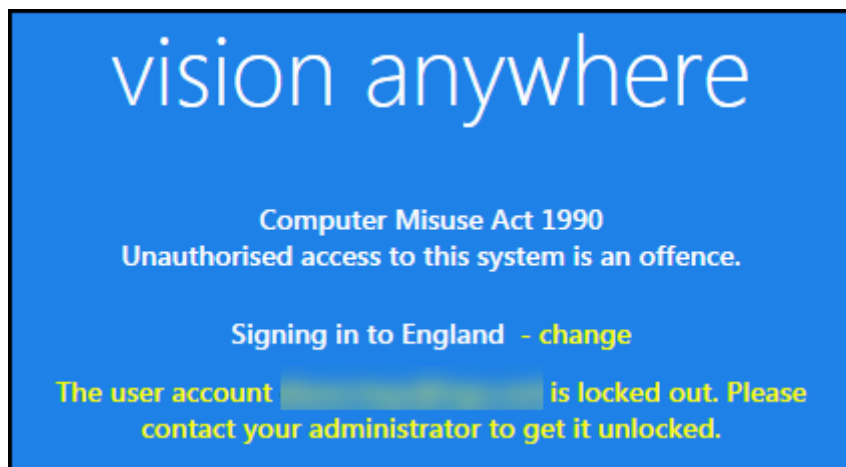
The following password validation rules apply when resetting a user's password:

- Minimum of six characters
- Contain upper and lower case letters
- Contain numbers
- Contain non-alphanumeric symbols (for example & \$ % etc)
- Password from the last five passwords cannot be used

Unlocking a Shared Care User's Account

 **Note** - You must be logged in as a System Manager to unlock a user account.

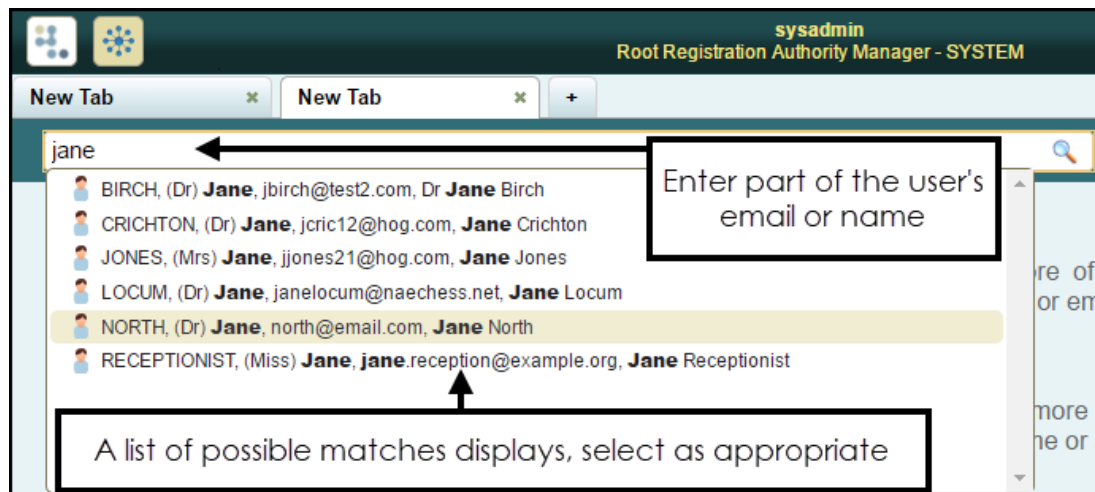
After three unsuccessful attempts at logging in, users are locked out of **Vision360** applications a locked out message displays depending on the application, for example:



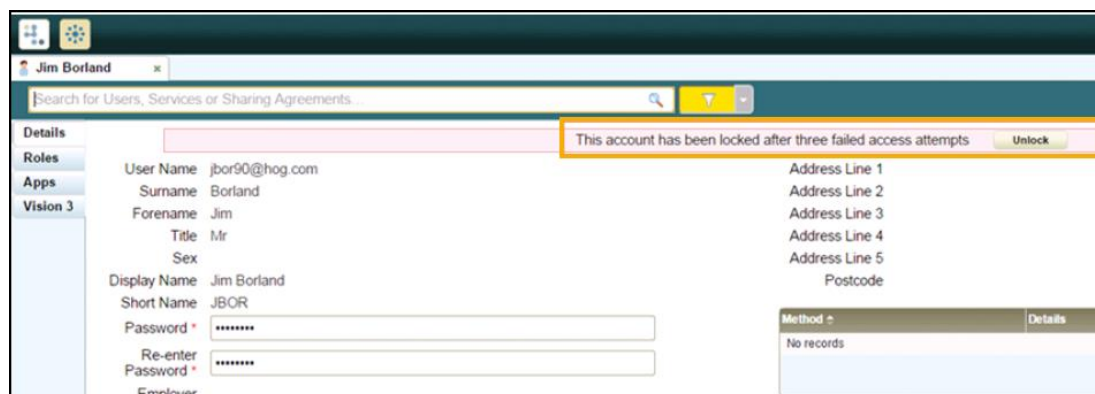
To unlock a shared care user's account:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.

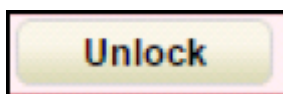
2. In **Search**, enter part of the locked user's name or email and select **Search** .



3. All matching results display, select the user required.
4. The **Edit User** screen displays with the **Details** tab selected.
5. A **This account has been locked after three failed access attempts** message displays at the top of the **Details** screen:



Select **Unlock**

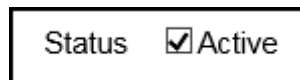


 See [Resetting a Password for a Shared Care User](#) on page **26** for details.

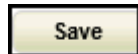
Inactivating a Shared Care User

To inactivate a **Shared Care** user:

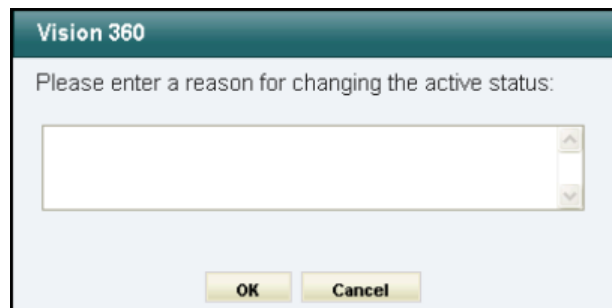
1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. The **Service Details** screen displays, select the user to inactivate.
3. From **Status**, remove the **Active** tick:



4. Select **Save**.



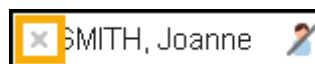
5. A **Vision360** screen displays, enter a reason for inactivation and select **OK**:



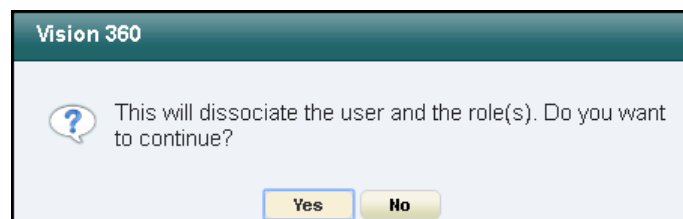
6. The reason for changing the status, along with the date displays in the **User - Details** view:



7. Now, open the **Service Details** for your organisation.
8. Select the **User Roles** view.
9. The inactivated user displays with a line through, select the **X** to remove them from the list:



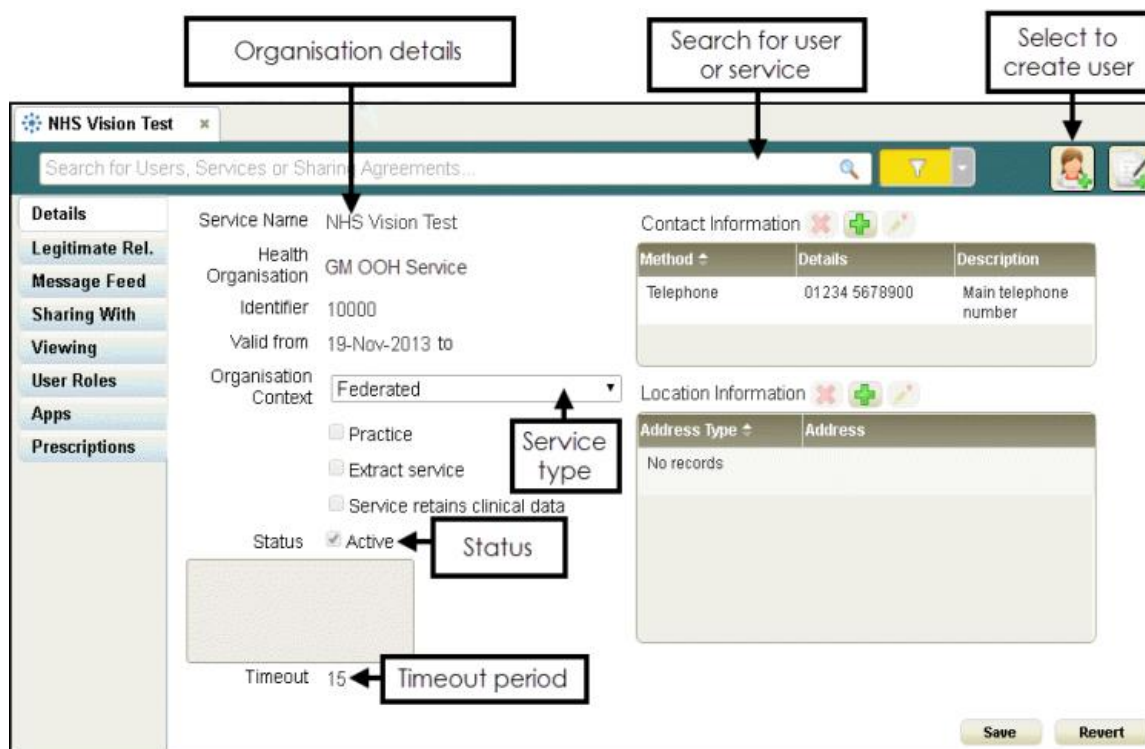
10. A **Vision360** message displays, select **Yes** to dissociate the user:



Service Management

The sharing of patient data is controlled by recording service agreement between the participating organisations.

Organisational Services enables System Administrators to view the Shared Care Service details along with associated organisations and manage staff access:



The screenshot shows the 'NHS Vision Test' service management page. Annotations with arrows point to specific features:

- Organisation details**: Points to the 'Service Name' and 'Health Organisation' fields.
- Search for user or service**: Points to the search bar at the top.
- Select to create user**: Points to the user icon in the top right.
- Service type**: Points to the 'Organisation Context' dropdown menu.
- Status**: Points to the 'Status' checkbox (Active).
- Timeout period**: Points to the 'Timeout' field (15).

The interface includes a sidebar with tabs: Details, Legitimate Rel., Message Feed, Sharing With, Viewing, User Roles, Apps, and Prescriptions. The main content area displays service details, contact information, location information, and a 'Save' button.

Depending on your access level, the following tabs are available:

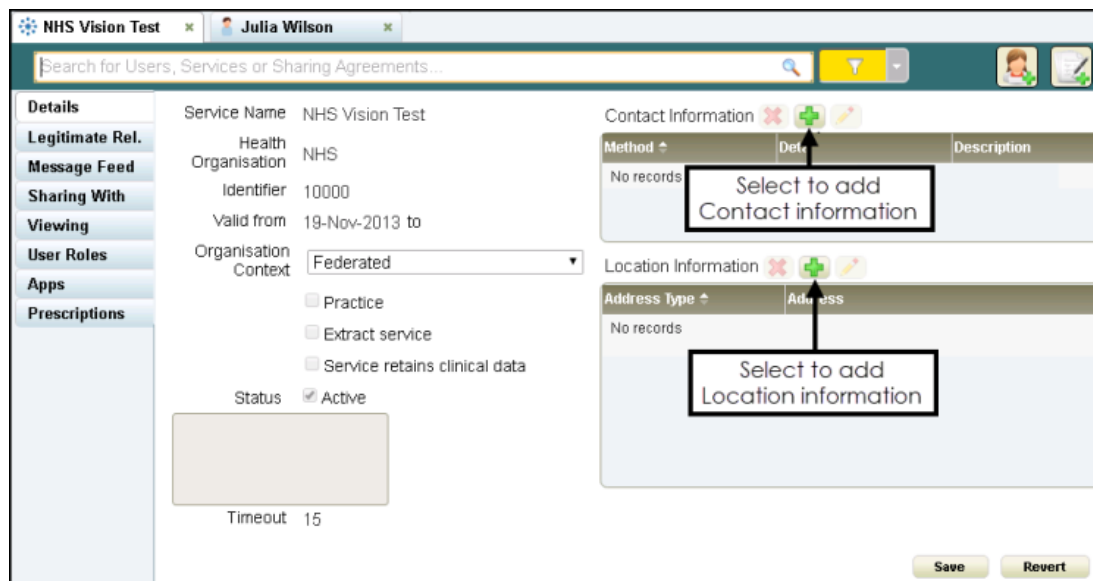
- **Legitimate Relationships** - The consent reasons to view a patient's record, see [Viewing Your Legitimate Relationships](#) on page 34 for details.
- **Message Feed** - Managed by **Vision360** deployment team.
- **Sharing With** - The organisations the Shared Care Service is sending data to, see [Which Organisations am I Sharing with?](#) on page 35 for details.
- **Viewing** - A view of all of the organisations that are sharing data with the Shared Care Service, see [Who is Sharing Data?](#) on page 36 for details.
- **User Roles** - View and maintain users and roles, see [Allocating User Services and Roles](#) on page 16 for details.
- **Apps** - Applications assigned to the Shared Care Service, see [Viewing a User's Applications](#) on page 18 for details.
- **Prescriptions** - For most shared care settings prescribing set up is managed by the **Vision360** deployment team.

Service Contact and Location Details

Service **Contact** and **Location Information** displays on the **Organisational Services Details** screen. Contact and location details should be added and maintained for each active service.



To add or edit **Contact** and **Location Information**:

1. Log into **Organisation Services** in the usual way, see [Logging in to Organisational Services](#) on page 6 for details.
2. The **Service Details** screen displays, find the service required, see [Searching for Users, Services and Sharing Agreements](#) on page 9 for details if required:



The screenshot shows the 'NHS Vision Test' service details. On the left is a sidebar with navigation links: Details, Legitimate Rel., Message Feed, Sharing With, Viewing, User Roles, Apps, and Prescriptions. The main area displays service details: Service Name (NHS Vision Test), Health Organisation (NHS), Identifier (10000), Valid from (19-Nov-2013 to), Organisation Context (Federated), and checkboxes for Practice, Extract service, and Service retains clinical data. The Status is Active. There is a Timeout of 15. On the right, there are two sections: 'Contact Information' and 'Location Information'. Both sections have a table with columns for Method, Description, and Address Type. Each section has a callout box with an arrow pointing to a green plus icon and the text 'Select to add Contact information' and 'Select to add Location information' respectively. At the bottom right are 'Save' and 'Revert' buttons.

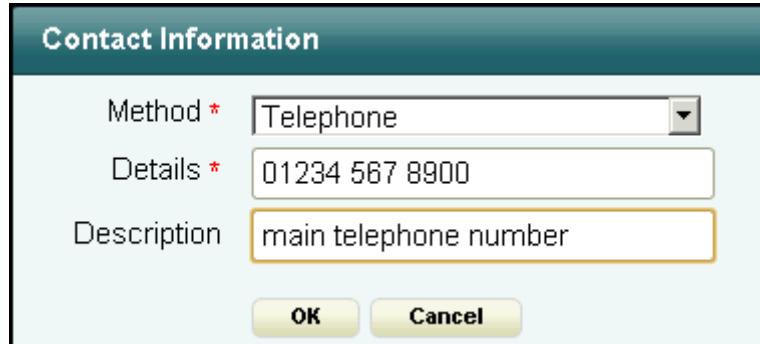
3. Either:

- Select **Add**  to add new information, or
- Highlight the information to update and select **Edit**  to update existing information.

4. Depending on the information you are adding or updating, one of the following displays:

Contact Information

The **Contact Information** screen displays:



The **Contact Information** screen displays the following fields:

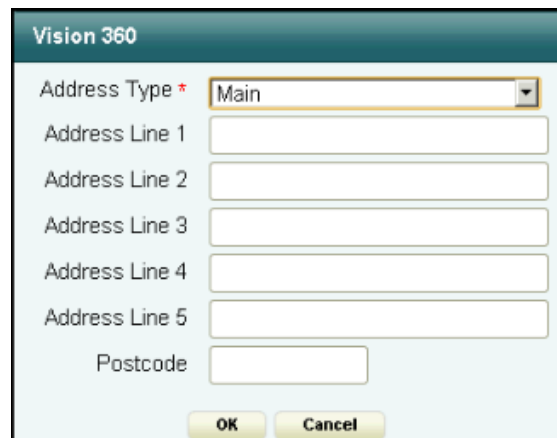
- Method ***: A dropdown menu with "Telephone" selected.
- Details ***: A text input field containing "01234 567 8900".
- Description**: A text input field containing "main telephone number".
- Buttons**: "OK" and "Cancel" buttons at the bottom.

Complete as required:

- **Method** - Select contact method from the available list.
- **Details** - Enter the information, for example the phone number or email address.
- **Description** - Optionally enter contact information, for example, opening hours.

Location Information

The **Location Information** screen displays:



The **Location Information** screen displays the following fields:

- Address Type ***: A dropdown menu with "Main" selected.
- Address Line 1**: A text input field.
- Address Line 2**: A text input field.
- Address Line 3**: A text input field.
- Address Line 4**: A text input field.
- Address Line 5**: A text input field.
- Postcode**: A text input field.
- Buttons**: "OK" and "Cancel" buttons at the bottom.

Complete as required:

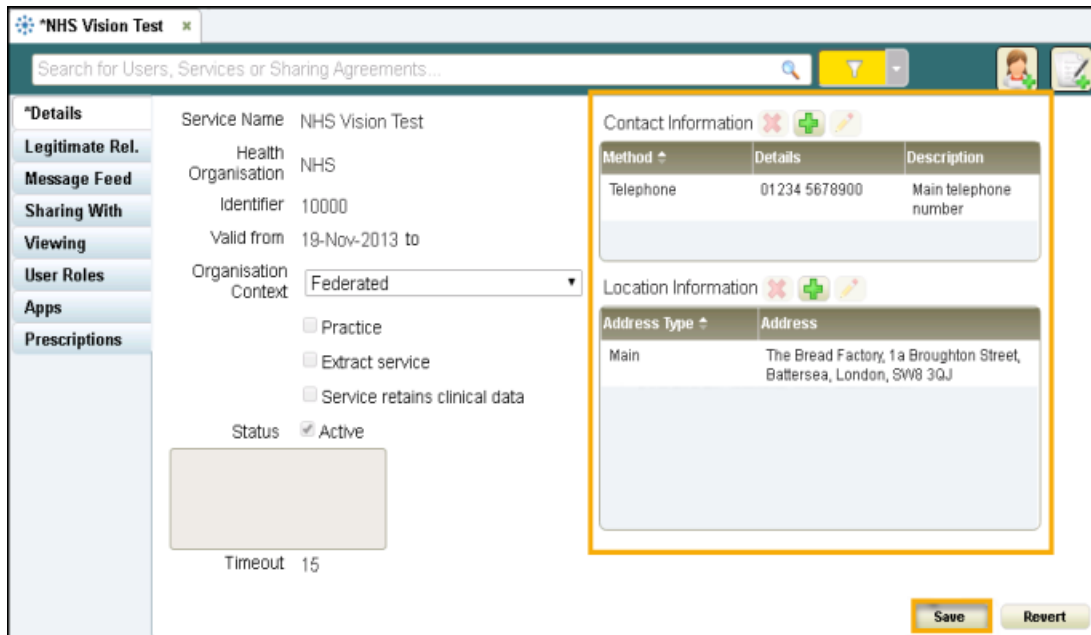
- **Address Type** - Select address type from the available list.



Note - A **Main** location is essential to be able to print MED3s from **Vision Anywhere** in a **Shared Care** setting.

- **Address Line 1 - 5** - Enter the address details.
- **Postcode** - Enter the postcode

5. Select **OK** to save:



***NHS Vision Test**

Search for Users, Services or Sharing Agreements...

Details

Service Name NHS Vision Test

Health NHS

Organisation NHS

Identifier 10000

Valid from 19-Nov-2013 to

Organisation Context Federated

☐ Practice

☐ Extract service

☐ Service retains clinical data

Status ☒ Active

Timeout 15

Contact Information

Method	Details	Description
Telephone	01234 5678900	Main telephone number

Location Information

Address Type	Address
Main	The Bread Factory, 1a Broughton Street, Battersea, London, SW8 3QJ

Save **Revert**

6. Select **Save** to save your changes, or **Revert** to cancel them.

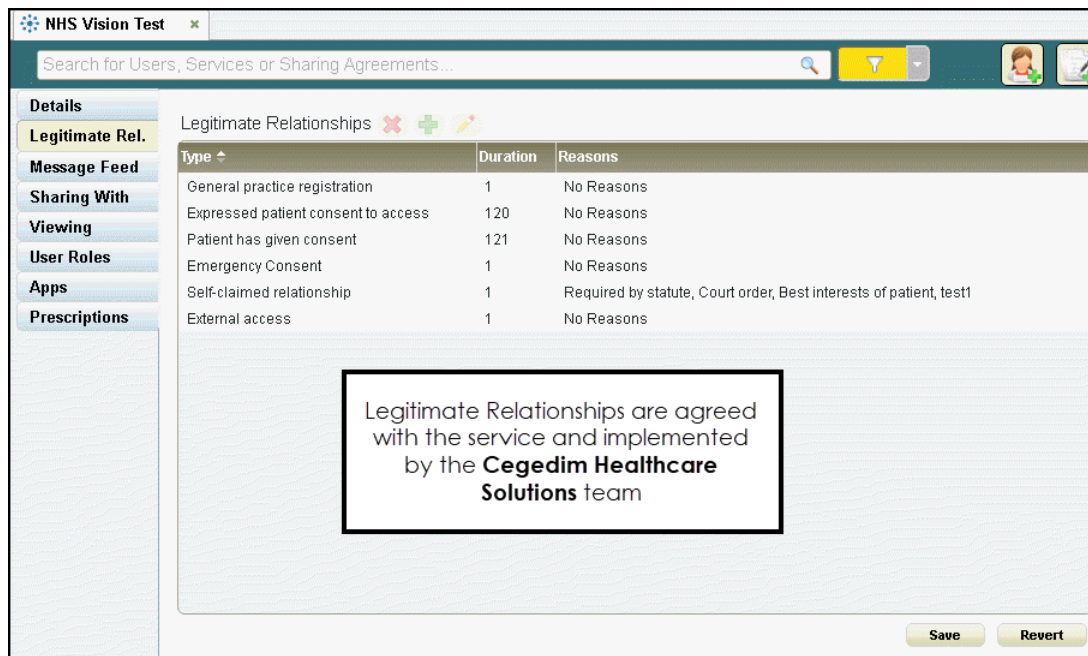


See [Service Management](#) on page 30 for details.

Viewing Your Legitimate Relationships

When using a Shared Care Service, a consent model is implemented to ensure that a legitimate relationship exists before a patient record can be viewed. These consents are set up and maintained in **Organisational Services**

- Legitimate Relationships:



Search for Users, Services or Sharing Agreements...

Details

Legitimate Rel.

Message Feed

Sharing With

Viewing

User Roles

Apps

Prescriptions

Legitimate Relationships

Type	Duration	Reasons
General practice registration	1	No Reasons
Expressed patient consent to access	120	No Reasons
Patient has given consent	121	No Reasons
Emergency Consent	1	No Reasons
Self-claimed relationship	1	Required by statute, Court order, Best interests of patient, test1
External access	1	No Reasons

Legitimate Relationships are agreed with the service and implemented by the **Cegedim Healthcare Solutions** team

Save Revert

The most common types of consent are:

- **General practice registration** - Patient is registered at the user's practice.
- **Expressed patient consent to access** - Patient has given consent.
- **Self-claimed relationship** - Acting in the best interest of the patient, for example, a court order.
- **External access** - User is not a GP or Shared Care Service user and are accessing the patient, for example, an auditor.
- **Patient has given consent**
- **Emergency consent** - Emergency access for urgent treatment when patient is incapacitated.



Note - The **Legitimate Relationships** list is agreed with the Shared Care Service and then maintained by the **Vision360** deployment team.

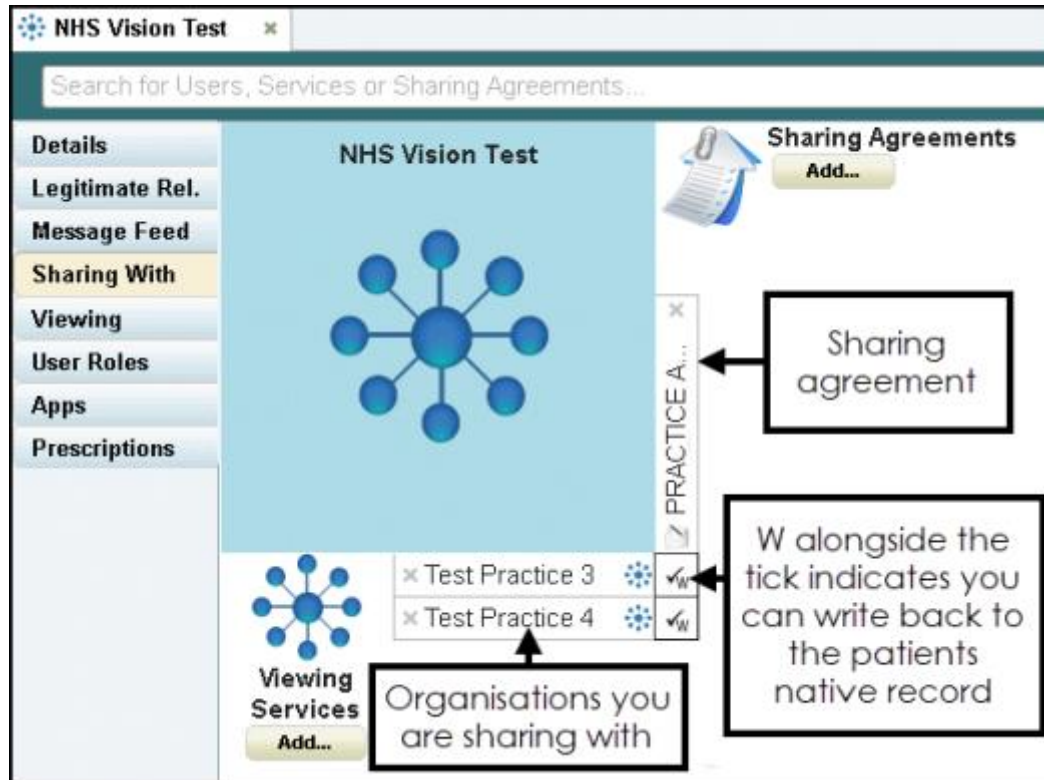
Recorded Consent Reasons can be reported on from **Audit Viewer**.



See **Service Management** on page **30** for details.

Which Organisations am I Sharing with?

To see the organisations you have a sharing agreement with and whether you can write back to a patient's native clinical system, from **Organisational Services**, select **Sharing With**:



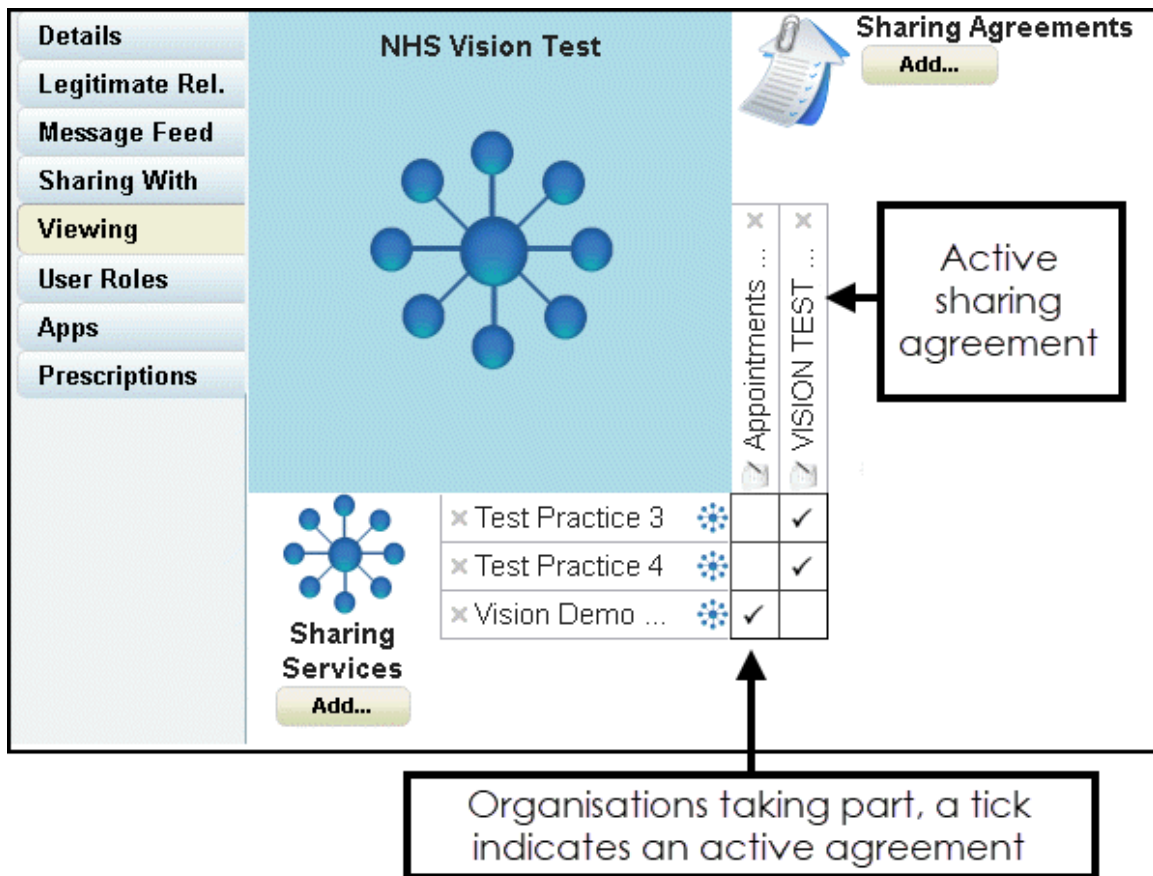
 **Note** - This screen is for reference only, it is maintained by the **Vision360** deployment team.

 **Training Tip** - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.

 See **Service Management** on page **30** for details.


Who is Sharing Data?

To see the organisations who are sharing data, and their active sharing agreements, from **Organisational Services**, select **Viewing**:



Sharing Services	Appointments ...	VISION TEST ...
× Test Practice 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
× Test Practice 4	<input type="checkbox"/>	<input checked="" type="checkbox"/>
× Vision Demo ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

 **Note** - This screen is for reference only, it is maintained by the **Vision360** deployment team.

 **Training Tip** - If you are using **Chrome** to access **Vision360**, ensure you have **Options - Zoom** set to **100%** or the table may not line up.

 See **Service Management** on page **30** for details.

Uploading Patients from EMIS to Vision360

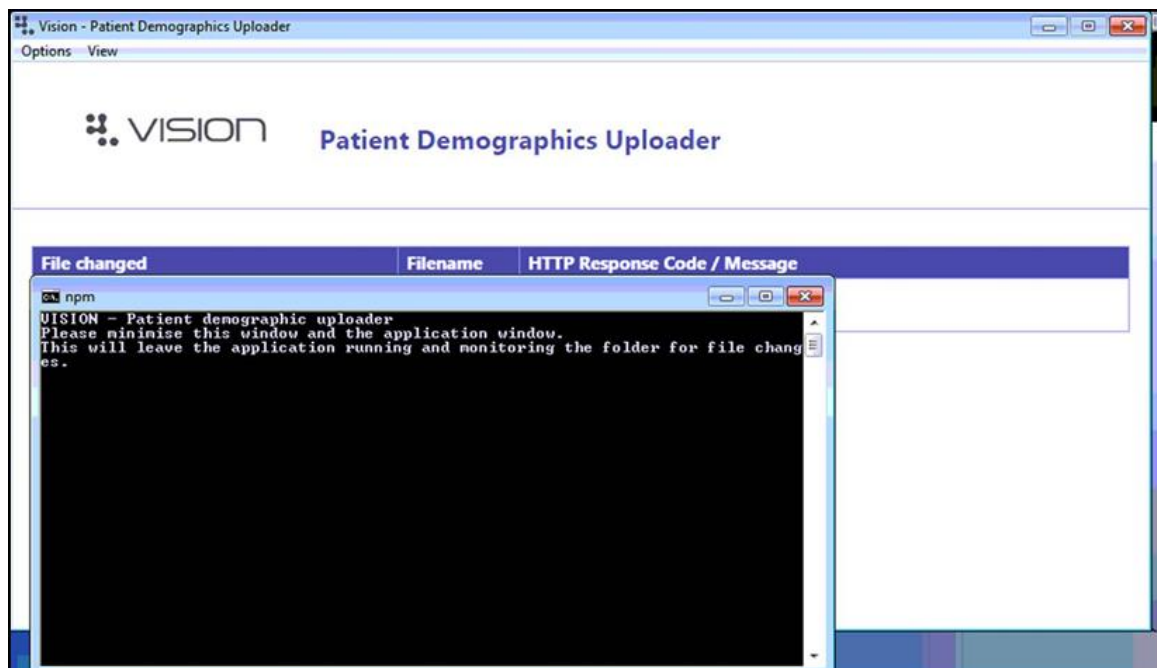
In order to have access to all **EMIS** patient data available within your shared care setting, you must upload it to **Vision360**. You should run an initial upload and then a daily update.

To upload and update your patient list to **Vision360**:

1. From your desktop, double click on **Patient Demographic Uploader**

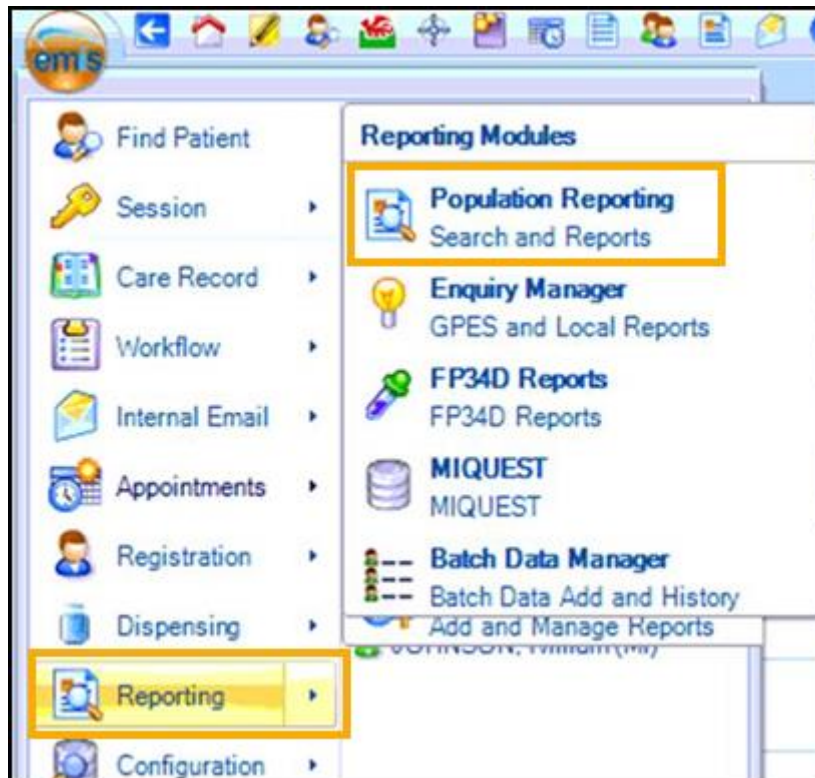


2. The **Vision - Patient Demographic Uploader** and **npm** screens display:

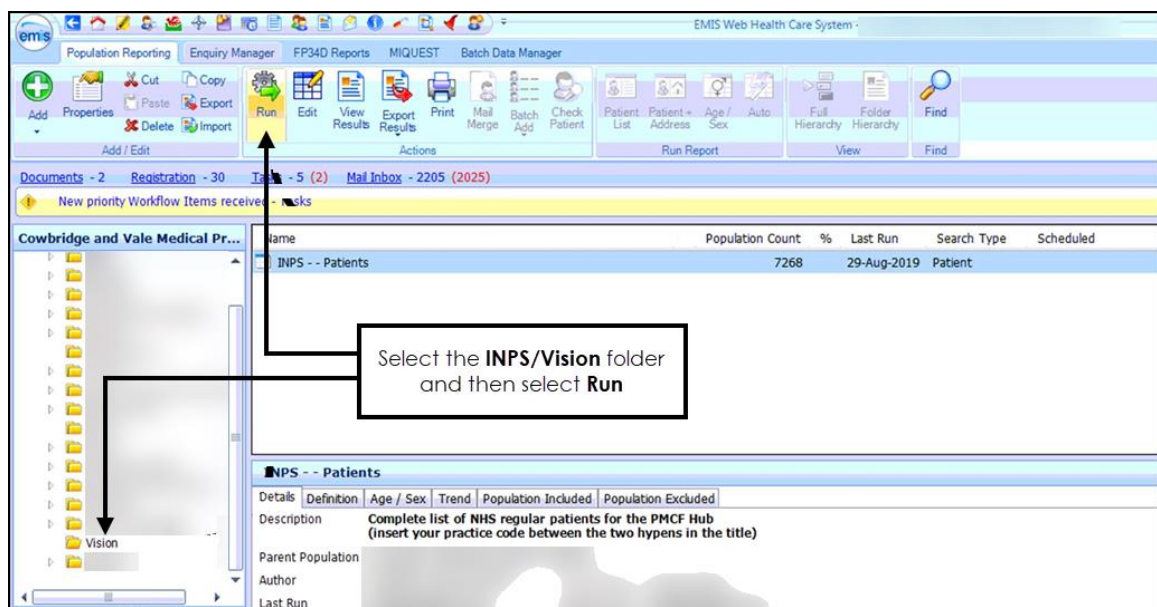


Important - A 'Warning: No connection to INPS!' message displays, you do not need to contact support unless you have an issue after trying to do an upload. If you do encounter an error once you have tried to do an upload, contact the **Cegedim Healthcare Solutions** Helpdesk.

- Open **EMIS Web**, if it is not already open and select **Reporting - Population Reporting**:



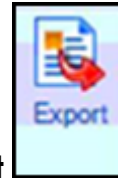
- Double click the **INPS** or **Vision** folder and the **INPS/Vision - Patient Report** displays:



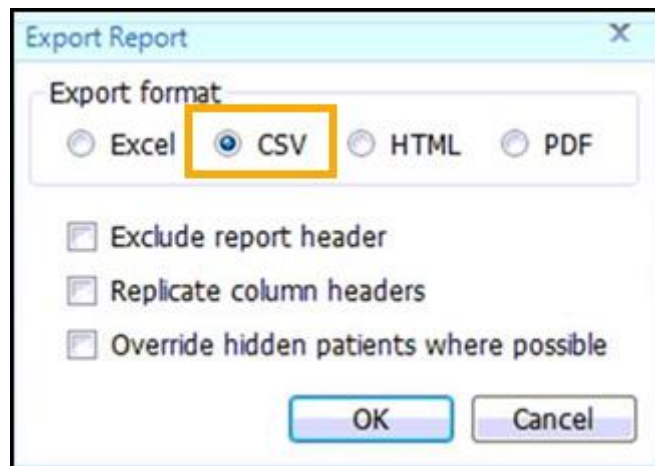
- Select **Run**.



6. Once the report completes, select **View Results**.

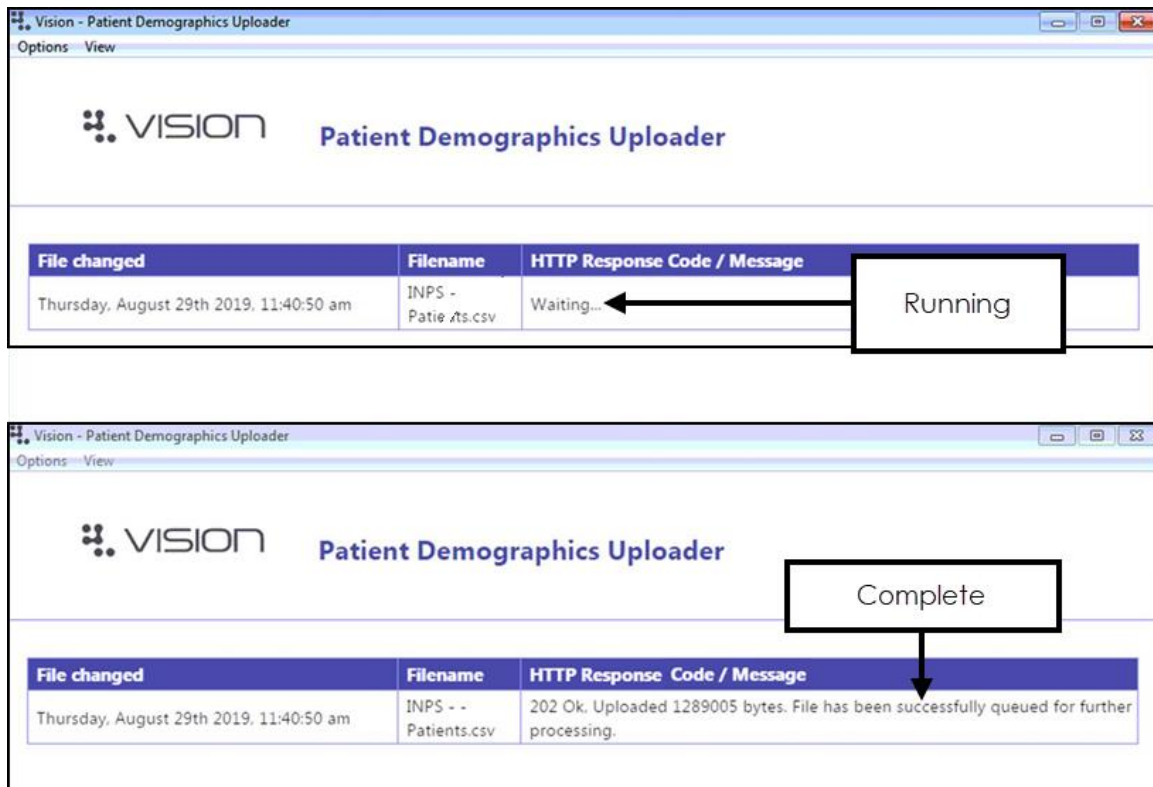


7. The **INPS - Patients** tab displays, select **Export**.
8. The **Export Report** screen displays, select **CSV**:




9. Select **OK**.
10. The **Save As** screen displays, navigate to **C:\Vision\vision_upload\upload_files** and double click on any existing report in this folder to overwrite it.
11. The **Confirm Save As** screen displays, select **Yes** to confirm.

12. The upload of your patient demographic starts. This takes approximately 15 minutes to complete, you can view the process by selecting **Vision** from your task bar, today's date, time and the response code of **Waiting** should display, this updates to **OK** once successfully completed:



13. Once the upload successfully completes, you can close the **Vision - Patient Demographic Uploader** and **npm** screens.

Once the file is exported the **Vision Client** automatically uploads it to the central system and processes your patient demographics.

 **Note - EMIS** can be used during the upload process as it happens in the background.