



Vision Anywhere for Windows Desktop

Supplementary Guide for Shared Care Services

Version 4.2

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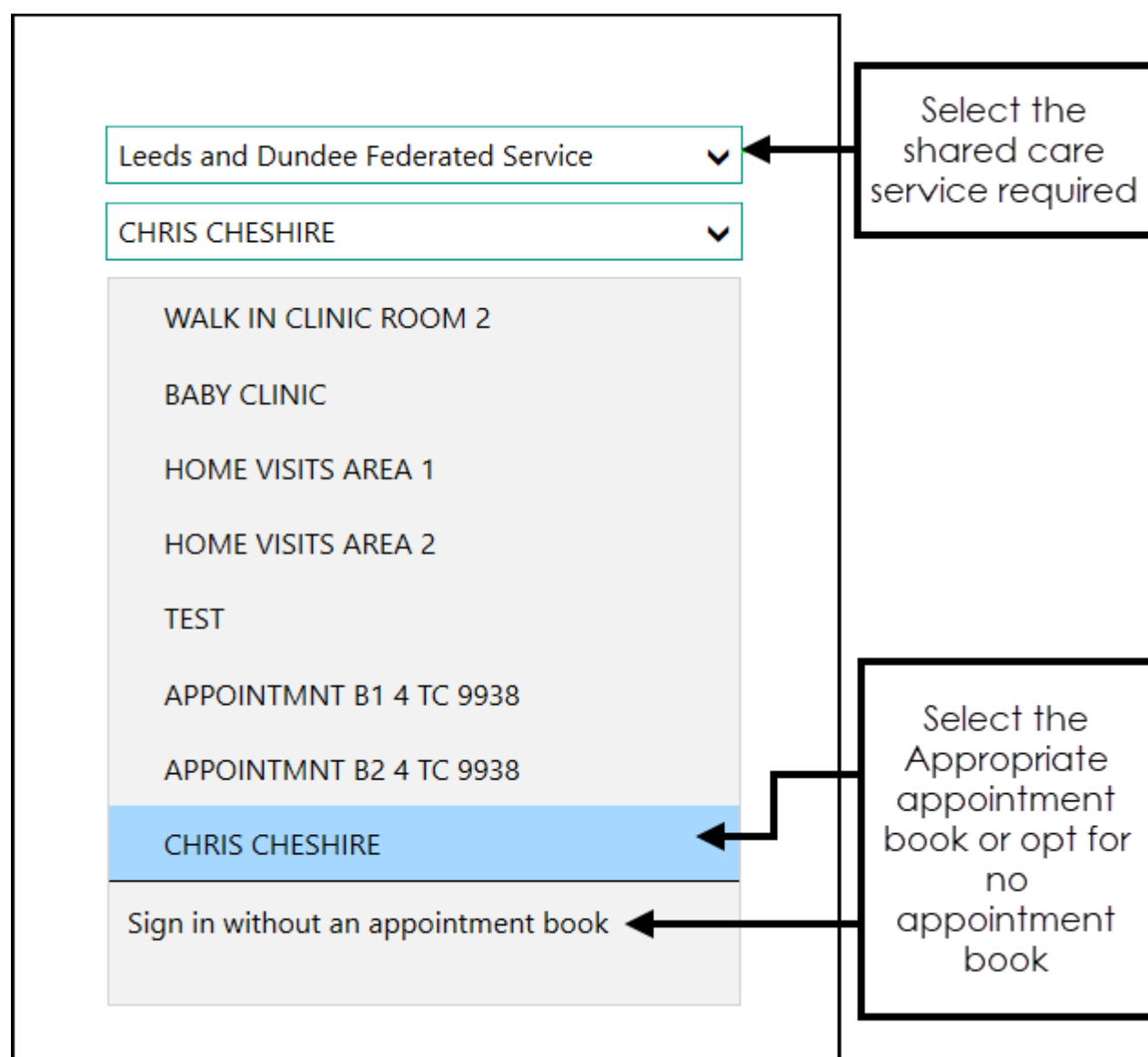
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Using Vision Anywhere in a Shared Care Setting

Most **Vision Anywhere** functionality is the same whether you are accessing your practice's patients or you are working as part of a shared care organisation.

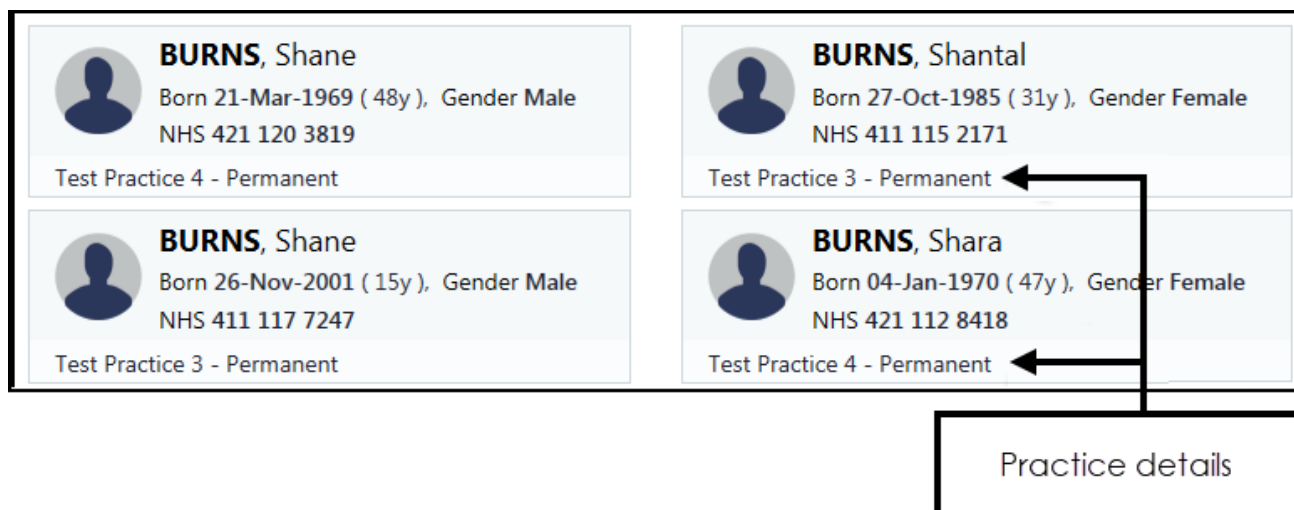
The following functionality is specific to shared care access:

- **Logging in** - When you login to **Vision Anywhere**, you have the option to select your local practice or your shared care service. Your choice here, determines the appointments list(s) offered. You can select to log in with no appointment book selected:



- **Registration Status** - Patients with either a permanent or applied status are available, although this depends on your sharing agreement.

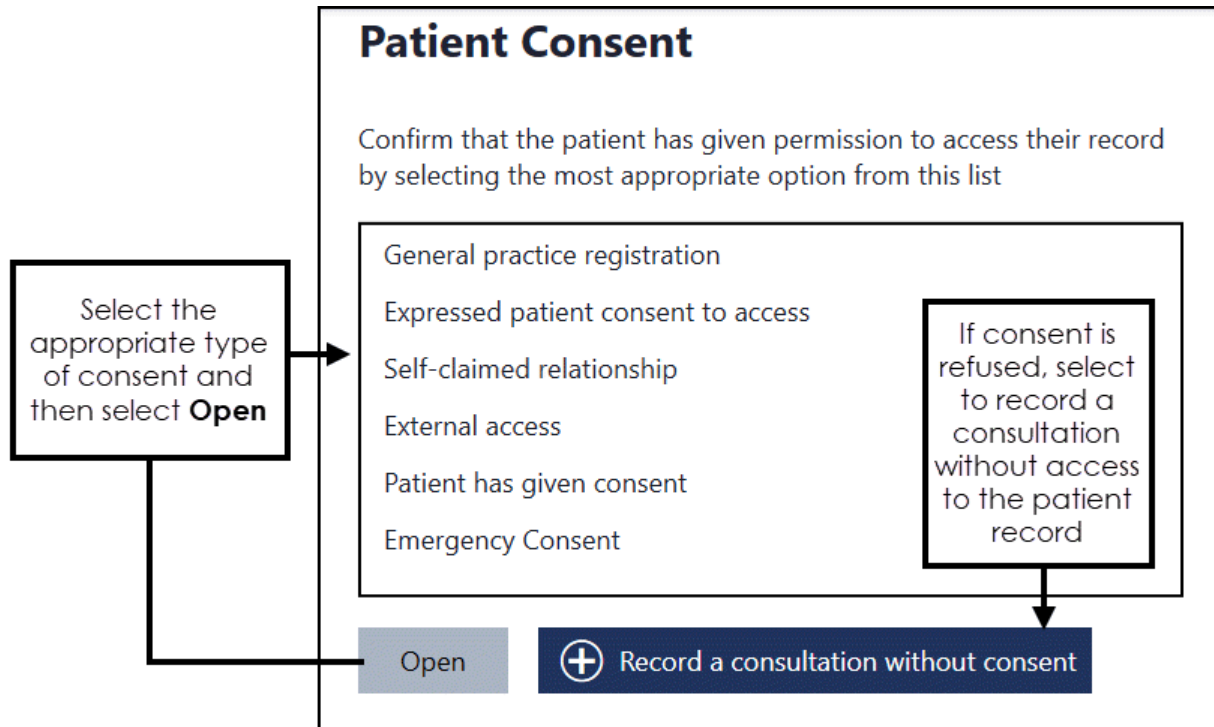
- **Patient Consent** - This must be recorded in order to access the patient's record, see [Patient Consent](#) on page 6 for details.
- **Patient Selection** - When manually searching for a patient, you can see which practice they are registered at. **Vision Anywhere** works alongside practices using EMIS Web and **Vision 3** and that are part of your sharing agreement:



- **Acute Printing/Re-printing** - In a shared care setting, you can print and reprint acute prescriptions. For **Vision 3** patients you can also issue, print and reprint repeats.
- **Repeat Medication Management** - Full repeat medication management is available for **Vision 3** registered patients.
- **EMIS Patients** - Repeat medication management, decision support, access to care reminders and correspondence are not currently available when you have an EMIS patient selected.
- **Referral Letters** - You can generate referral letters for patients, for Vision patients a copy of the letter also files back into the patient's record. For EMIS patients the entry writes back as a general history item without a copy of the letter, this is due to a limitation of the software.
- **Windows 7 Minimum Specification**
 - Processor 1.33 GHz
 - RAM 2 GB RAM
 - OS Windows 7 SP1, 32-bit and 64-bit
 - Disk space 10 GB

Patient Consent

When **Vision Anywhere** is used in a **Shared Care Setting** a consent model is implemented to ensure that a legitimate relationship exists with a patient, before their record can be viewed:




Consent Reasons

The clinician must record patient consent, confirming that the patient has given permission to access their record by selecting the most appropriate option. These reasons are agreed with the shared care service, examples are given below:


- **General practice registration** - The patient is actually registered to the clinician's home practice.
- **Expressed patient consent to access** - Patient has given consent.
- **Self-claimed relationship:**
 - It is in the best interest of the patient.
 - There is a court order.
 - It is in the public interest.
- **External access** - User is not a GP/hub user and are accessing the patient outside of the service, for example, an auditor.
- **Emergency consent** - Emergency access for urgent treatment, for example, patient incapacitated.

If a patient has dissented to share their record with the service, when a consent reason is chosen, the message *'Please note that the patient has withdrawn consent from this service'* displays.

If appropriate, select **Record a consultation without consent** to proceed.

 **Patient Consent**

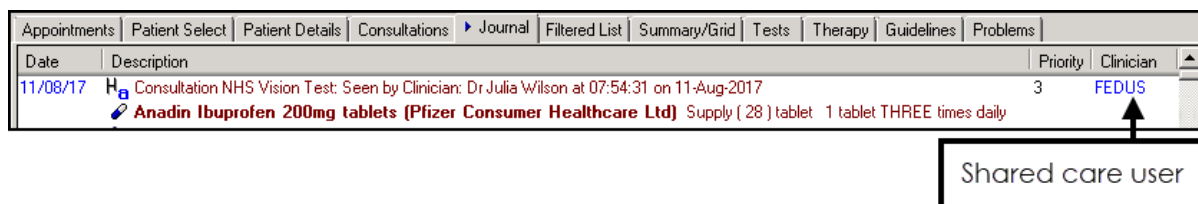
Please note that the patient has withdrawn consent from this service.

 Record a consultation without consent

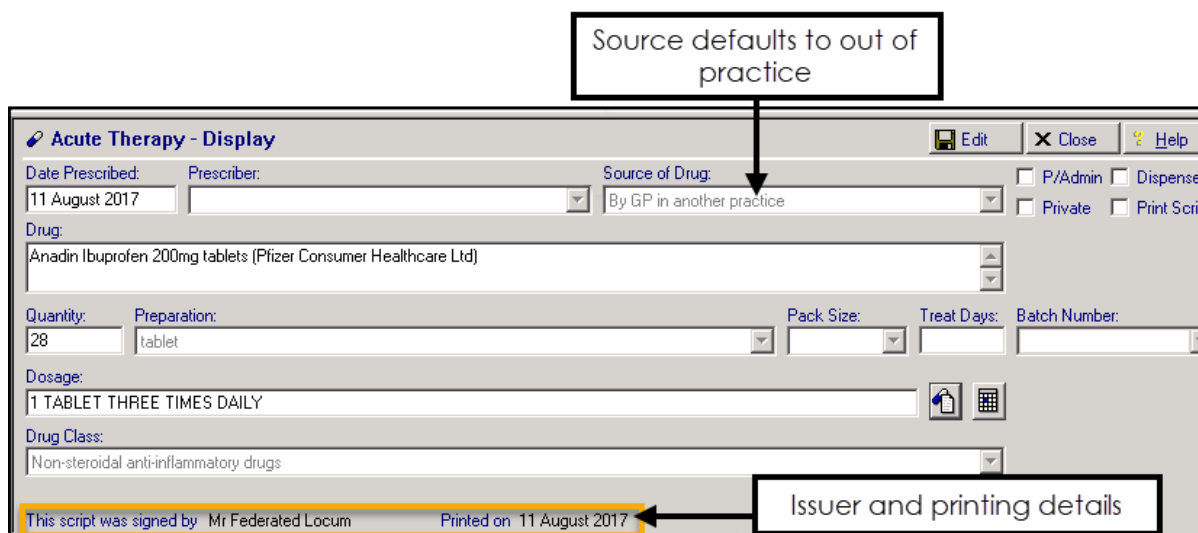
 See [Using Vision Anywhere in a Shared Care Setting](#) on page [4](#) for details.


Prescribing within a Shared Care Setting

Medication prescribed in a Shared Care setting displays with Federated User, **FEDUS**, in the **Clinician** column in **Vision 3**.



When the entry is viewed, the source displays as **By GP in another practice**. If the prescription was printed, the printed date also displays.



 **Note** - If the medication added is a repeat master, it can be issued against in the usual way.

 For EMIS Web sites, see [Data Write Back within a Shared Care Setting](#) on page [9](#).

Data Write Back within a Shared Care Setting

Once an Encounter has been closed and uploaded in **Vision Anywhere**, any data recorded automatically writes back to the patient's record in either **Vision 3** or EMIS.






Any consultations recorded in a shared care setting have "Dr Federated User" as the clinician and the clinical term **9kh0 Attended extended hours clinic - ESA** entered into the patient's notes.

Vision 3 Practices

The encounter header is sent to **Mail Manager** and the consultation details are automatically added to the patient's record:

Navigation		
PETE DAI	02/01/1974 (M)	NHS No: 9436303513
This patient has been updated by a remote service, please consult the patient record for further information.		
Journal	Therapy	Repeats
General History	Tests	Allergy
Problems	Filtered	
Date	Details	Clinician

The consultation details display in the journal as normal:

25/04/17	 Peak exp. flow rate: PEFR/PFR : = 500 L/min
 BP 110 / 70	O/E - blood pressure reading
 Never smoked	Never smoked
 Weight 1.3 kgs	O/E - weight
 FLU Stage: 0	Given

EMIS Practices

The coded clinical data is automatically filed into the patient record, however due to limitations on the EMIS API any medication prescribed is degraded and therefore needs to be added by practice staff:

12-Nov-2015	G.P Surgery	USER, Federated (M)
Medication:	Atorvastatin 40mg tablets One a Day 7 tablet	
Comment:	Blood sample taken Blood sample taken U&E, UPT, Lipids Chesty cough Chesty cough for 2/32	
18-Nov-2015	G.P Surgery	USER, Federated (M)
Medication:	Ramipril 10mg tablets one a day 28 tablet	
18-Nov-2015	G.P Surgery	USER, Federated (M)
Comment:	O/E - blood pressure reading BP 130 / 94 O/E - blood pressure reading	
18-Nov-2015	G.P Surgery	USER, Federated (M)
Medication:	Paracetamol 500mg tablets 100 and 100 tablet	
Comment:	Urine sample sent to Lab Urine sample sent to Lab	
Comment:	O/E - pulse rate O/E - pulse rate beats/min 97 O/E - BP reading BP 145 / 85 O/E - BP reading Pain in eye Pain in eye Examination done - no reason	

An email alert is generated to advise the practice that an encounter has been recorded in the shared care setting.

Organisational Services

User accounts for **Vision Anywhere** in a shared care setting are managed in **Vision 360 - Organisational Services**.

The link and log in details were provided as part of your **Vision Anywhere** go live:

User management:

- [Adding a Shared Care User](#) on page [11](#).
- [Resetting a Password for a Shared Care User](#) on page [18](#).
- [Unlocking a Shared Care User's Account](#) on page [20](#).

Services

- For details on viewing and maintaining data sharing agreements between organisations.

Audit Trail

- For details on viewing user and patient activity.

Licence Manager

License Manager is used for managing mobile device access, see:

- [Licence Manager](#) on page [22](#).
- [Using Licence Manager](#) on page [22](#).



See the [Shared Care Help Centre](http://help.visionhealth.co.uk/SharedCare/Content/Home.htm) (<http://help.visionhealth.co.uk/SharedCare/Content/Home.htm>) for full **Organisational Services** details.

Adding a Shared Care User

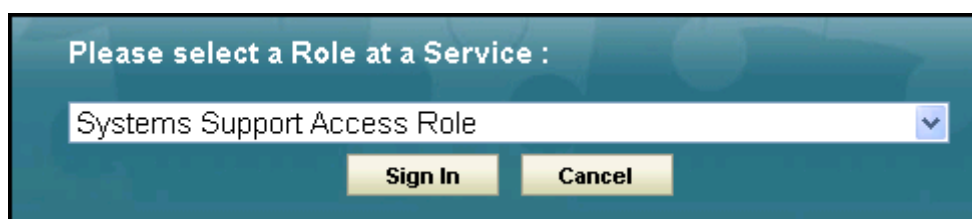
In order to use **Vision Anywhere** in a shared care setting, you must be set up as a user in **Organisational Services** and be added to the service required.

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

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**:



3. From **Please select a Role at a Service**, select **Systems Support Access Role**:



4. The **Vision 360 Clinical Portal** home screen displays, select



Organisational Services

5. The **Service Details** screen displays.
6. Check to see if the user already exists, see [Searching for a User in a Shared Care Setting](#) on page [15](#) for details.
 - If the user exists, you can simply add the service required, see [Add a User to a Service](#) on page [14](#) for details.
 - If the user does not exist, they must be added, see [Create a User in Organisational Services](#) on page [12](#) for details.

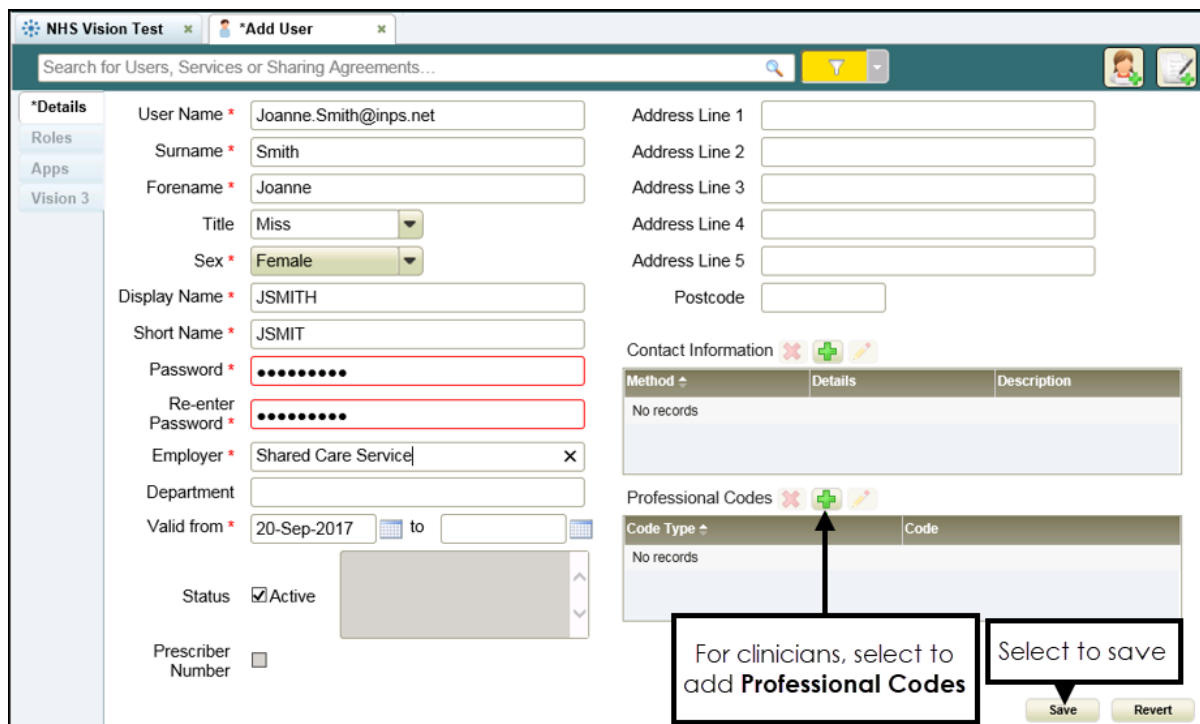
Now complete the following as required:

Create a User in Organisational Services

1. Open the **Shared Care Service** you want to add the user to.



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




The screenshot shows the 'Add User' form in the NHS Vision Test system. The form is divided into several sections:

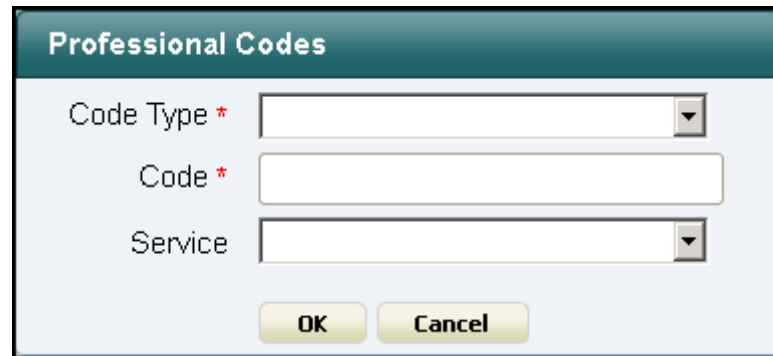
- User Details:** Fields for User Name (*), Surname (*), Forename (*), Title, Sex (*), Display Name, Short Name, Password (*), Re-enter Password (*), Employer (*), Department, Valid from (*), Status, and Prescriber Number.
- Contact Information:** Fields for Address Line 1 through 5 and Postcode.
- Professional Codes:** A section with a table for adding codes. An annotation points to the '+' icon in the table header, stating: "For clinicians, select to add **Professional Codes**".
- Save/Revert:** Buttons at the bottom right. An annotation points to the 'Save' button, stating: "Select to save".

3. Enter the new users details, items marked * are mandatory fields.
 - The password must be a minimum of 6 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.

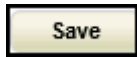
4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:

Adding a Professional Codes

1. From **Professional Codes**, select **Add** .
2. The **Professional Codes** screen displays:

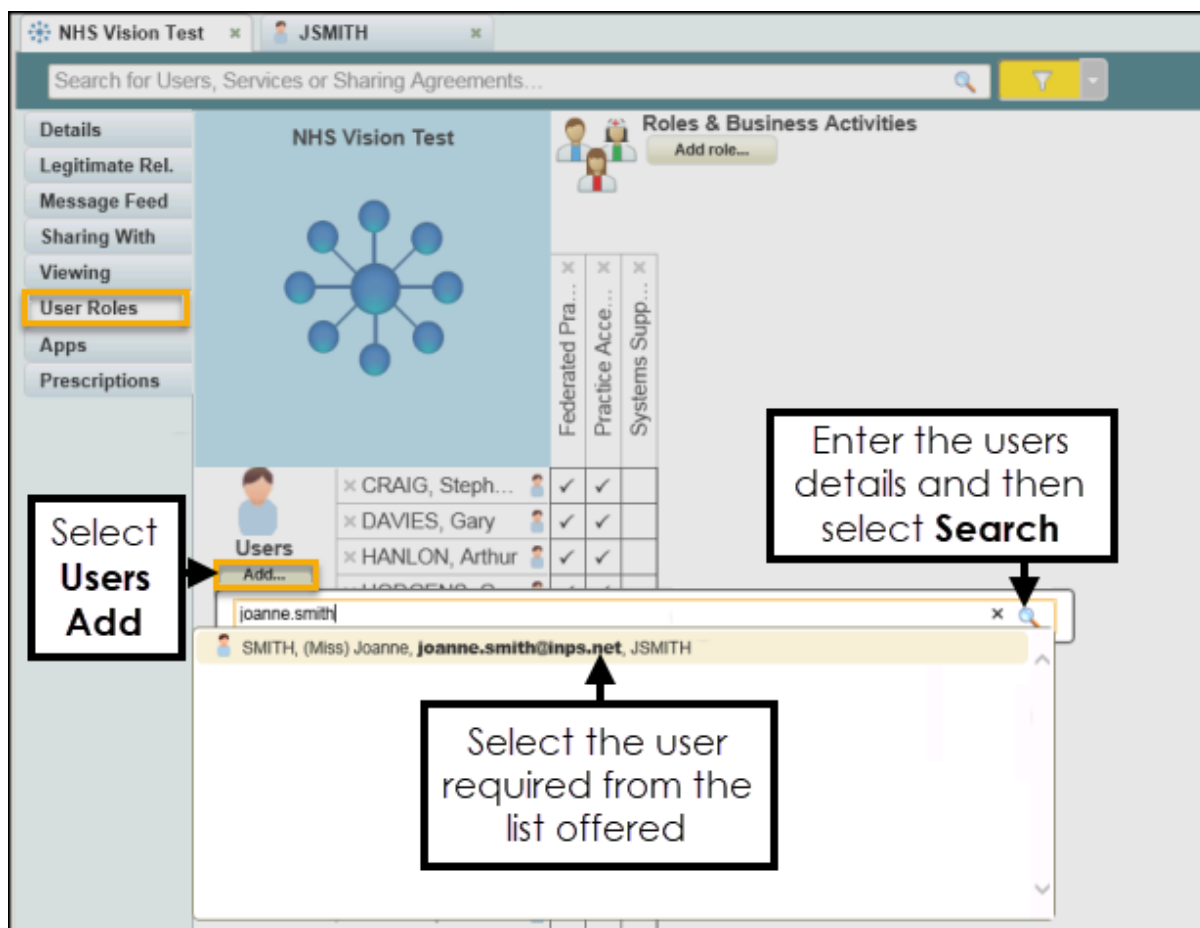



The screenshot shows a dialog box titled "Professional Codes". It contains three input fields: "Code Type *" (a dropdown menu), "Code *" (a text input field), and "Service" (a dropdown menu). At the bottom of the dialog are two buttons: "OK" and "Cancel".

3. 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.
4. Select **OK**.
5. Select **Save** .

Add a User to a Service

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



3. Select **Users Add....**
4. Enter user's details in the search bar and select **Search** .
5. Select the user from the results.
6. The user is assigned to the shared care service.
7. Tick next to the user's name, under the appropriate heading, to allocate their role.



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

Searching for a User in a Shared Care Setting

To prevent duplicated users being created and in order to view or edit a user's details in a shared care setting, you search for the user in the Clinical Portal.

To find a user in the **Vision 360 Clinical Portal**:

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**:



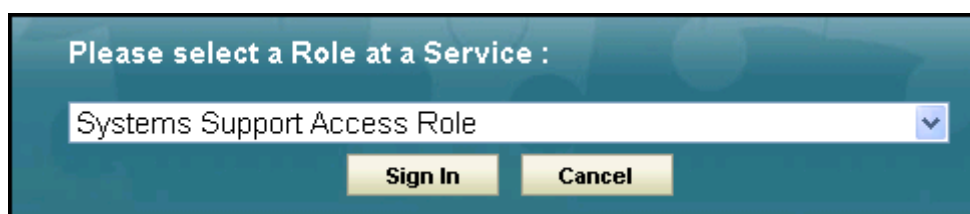
Sign in with your Vision ID

debbie.cuthbert@inps.net

.....

Sign In

3. From **Please select a Role at a Service**, select **Systems Support Access Role**:



Please select a Role at a Service :

Systems Support Access Role

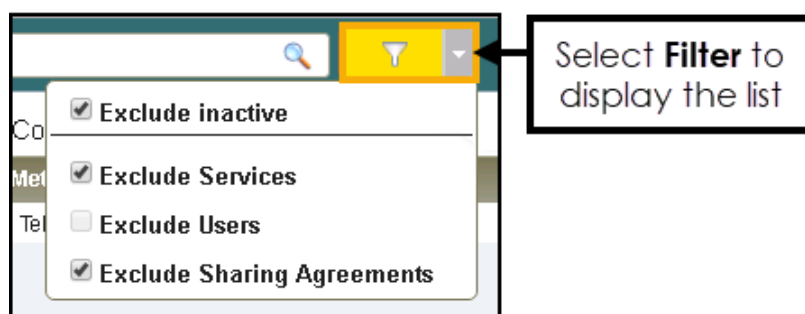
Sign In Cancel

4. The **Vision 360 Clinical Portal** home screen displays, select



Organisational Services

5. The **Service Details** screen displays.
6. Select **Filter** from the main search bar and to display Users only, tick:
 - **Exclude services**
 - **Exclude sharing agreements**



Select **Filter** to display the list


Exclude inactive

Exclude Services

Exclude Users

Exclude Sharing Agreements

Note - By default the filter excludes inactive users. Untick **Exclude inactive** to search on all users.

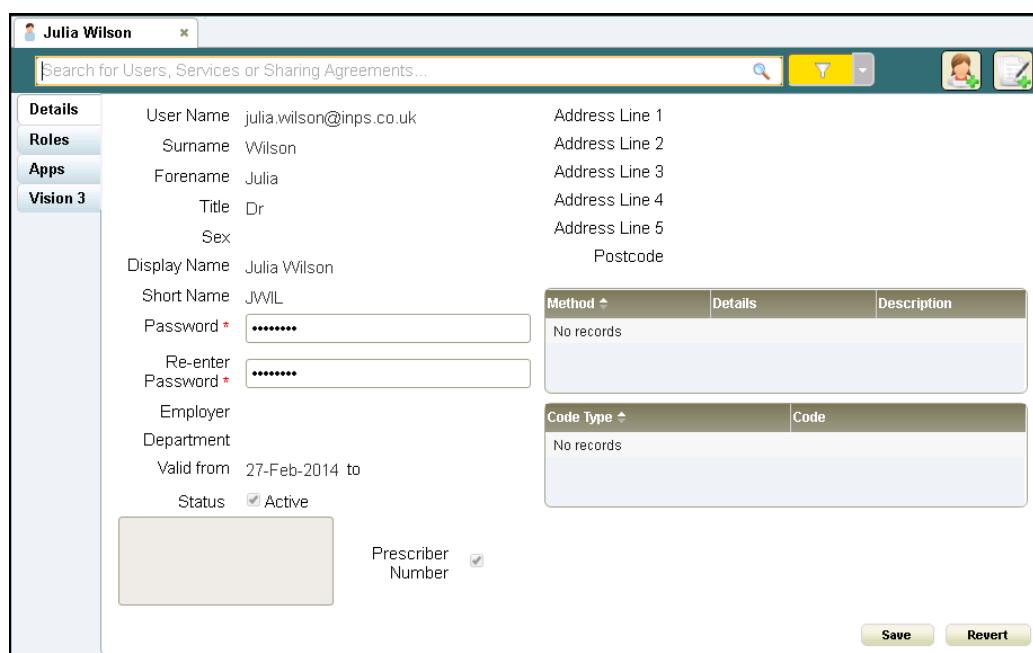
7. Enter a minimum of two characters from either the surname, forename, username, display name or employer in **Search** and select **Search** :



8. Matching results display ordered by surname, select as required:



9. The **User Details** screen displays, update as required:



Julia Wilson

Search for Users, Services or Sharing Agreements...

Details

User Name: julia.wilson@inps.co.uk

Surname: Wilson

Forename: Julia

Title: Dr

Sex:

Display Name: Julia Wilson

Short Name: JWIL

Password: *****

Re-enter Password: *****

Employer:

Department:

Valid from: 27-Feb-2014 to

Status: ☒ Active

Address Line 1:

Address Line 2:

Address Line 3:

Address Line 4:

Address Line 5:

Postcode:

Method:

Details:

Description:

No records

Code Type:

Code:

No records

Prescriber Number: ☒

Save Revert

 See [Resetting a Password for a Shared Care User](#) on page [18](#) for details.


What Roles should be added for Vision Anywhere in a Shared Care Setting?

The following roles should be added to facilitate **Vision Anywhere** in a shared care setting, for:

- **Clinicians** - Tick **FEDERATED_PRACTITIONER_ACCESS**
- **Non-clinicians** - Tick **FEDERATED_PRACTITIONER_ACCESS**, then right click on the tick and select **Business Activities**. Remove the tick from all categories except:
 - **Appointments restricted.**
 - **Journal.**
- **System Administrators** - Tick **ADMIN (System Support)** to allow:
 - Creating and maintaining users.
 - Resetting passwords.
 - Unlocking accounts.
 - Access to the audit trail.

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.

1. Open your browser and access the **Vision 360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Vision 360 Clinical Portal** by entering your user name and password and select **Sign In**:



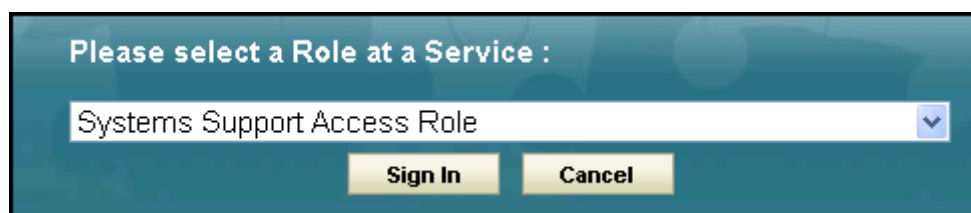
Sign in with your Vision ID

debbie.cuthbert@inps.net

.....

Sign In

3. Select your **Systems Support Access Role**:




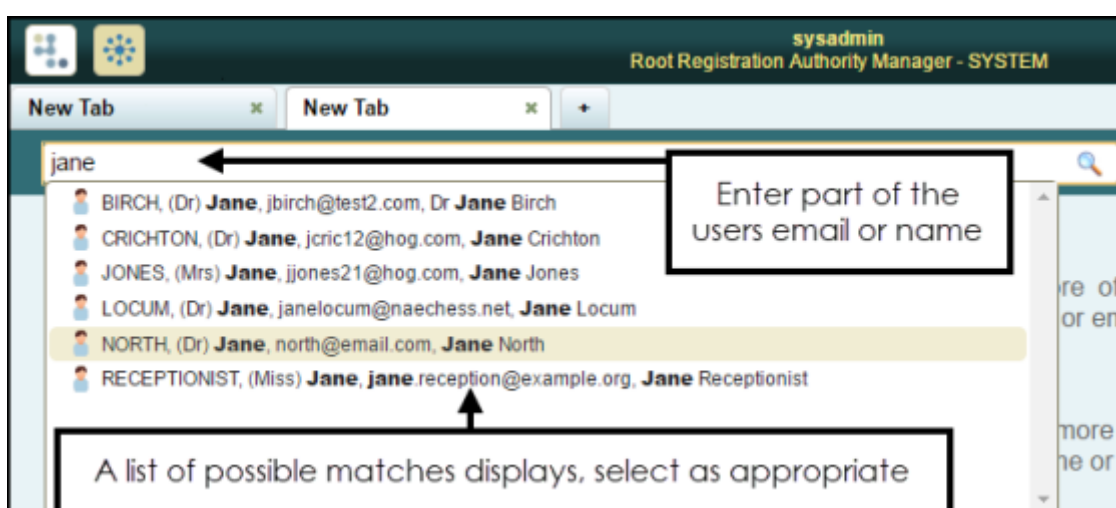
Please select a Role at a Service :

Systems Support Access Role

Sign In Cancel



4. Select **Organisational Services**.
5. In the search box, type part of the locked user's name or email and select **Search** :



sysadmin
Root Registration Authority Manager - SYSTEM

New Tab New Tab

jane

BIRCH, (Dr) **Jane**, jburch@test2.com, Dr **Jane** Birch

CRICHTON, (Dr) **Jane**, jcric12@hog.com, **Jane** Crichton

JONES, (Mrs) **Jane**, jjones21@hog.com, **Jane** Jones

LOCUM, (Dr) **Jane**, janelocum@naechess.net, **Jane** Locum

NORTH, (Dr) **Jane**, north@email.com, **Jane** North

RECEPTIONIST, (Miss) **Jane**, jane.reception@example.org, **Jane** Receptionist

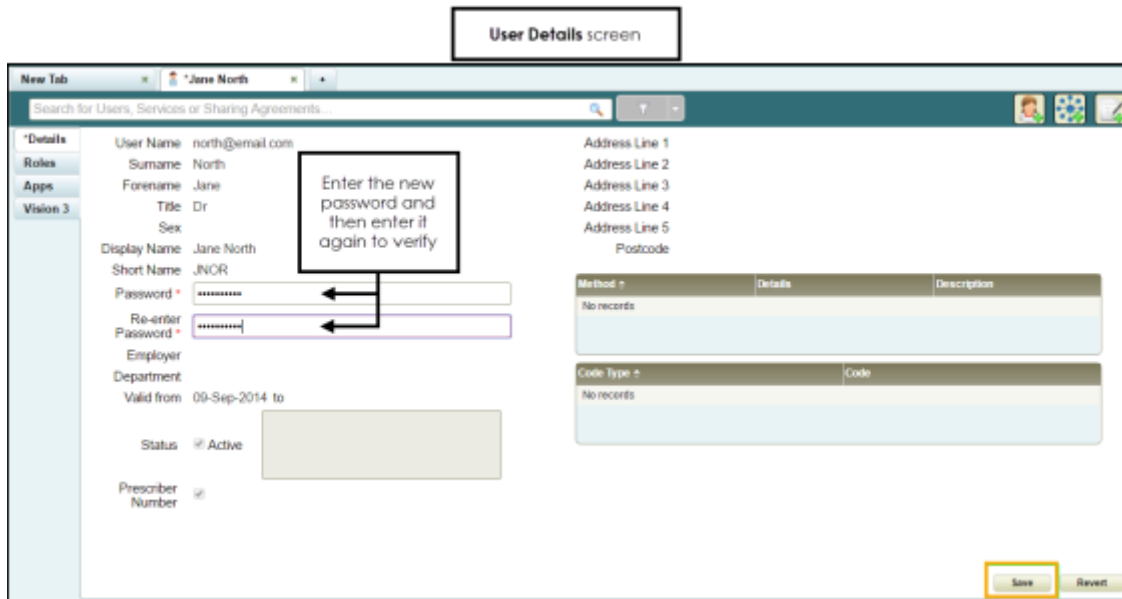
Enter part of the users email or name

A list of possible matches displays, select as appropriate

6. All matching results display, select the user required.
7. The **Edit User** screen displays with the **Details** tab selected.
8. In **Password**, enter a new password.

9. In **Re-enter Password** enter the new password again to confirm:

User Details screen



The screenshot shows the 'User Details' screen for a user named Jane North. The 'Re-enter Password' field is highlighted with a red border, and a callout box points to it with the text 'Enter the new password and then enter it again to verify'. The 'Save' button is highlighted with a yellow border.

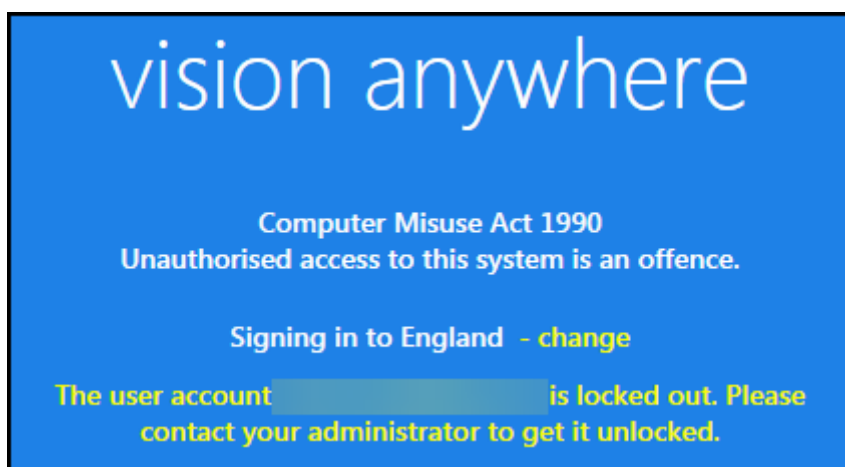
10. Select **Save**.

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

- Minimum of 6 Characters.
- Contain Upper and Lower case Letters.
- Contain Numbers.
- Contain Non-alphanumeric symbols, for example & \$ %.
- Password from the last 5 passwords cannot be used.

Unlocking a Shared Care User's Account

After three unsuccessful attempts at logging in, users are locked out of **Vision Anywhere** and the locked out message displays:

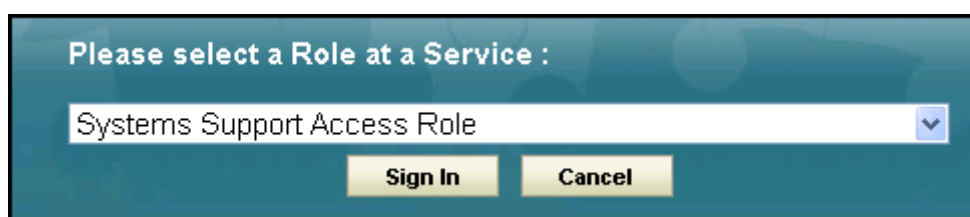


To unlock a shared care user's account:


1. Open your browser and access the **Vision V360 Clinical Portal** using the URL provided by the Vision Data Hub implementation team.
2. Login to the **Clinical Portal Vision 360** by entering your user name and password and select **Sign In**:

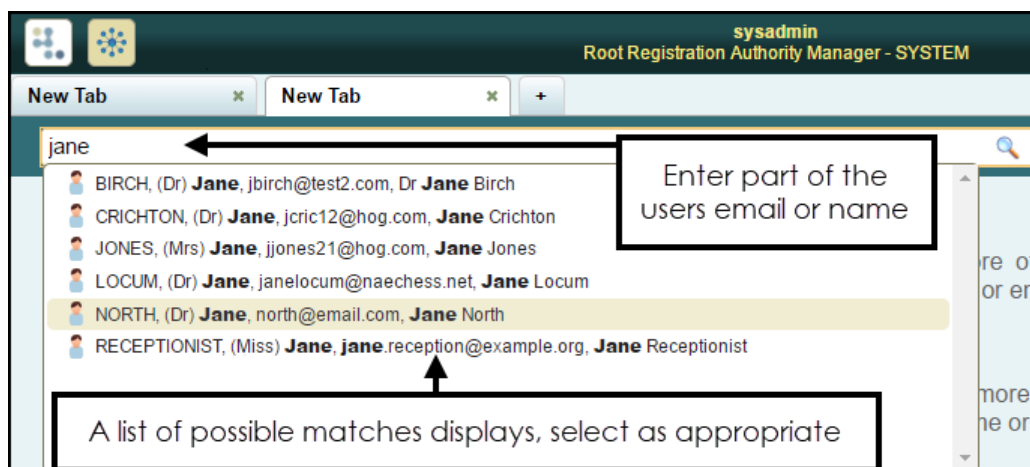


3. Select your **Systems Support Access Role**:

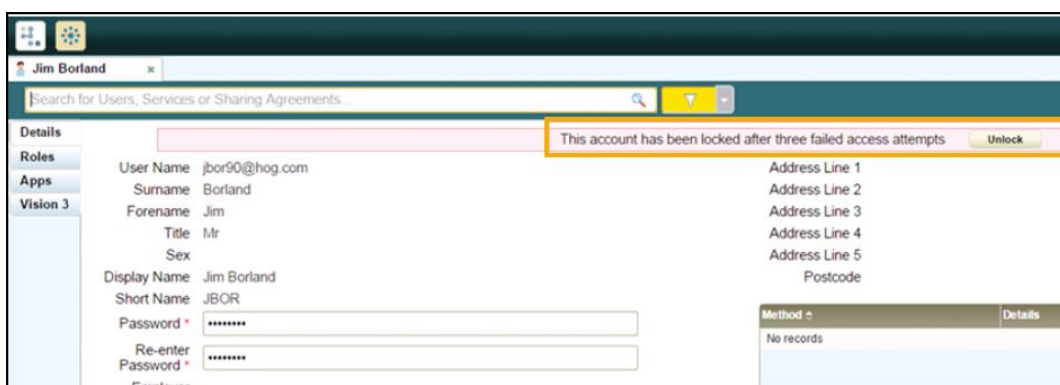


4. Select **Organisational Services**.

- In the search box, type part of the locked user's name or email and select **Search** :



- All matching results display, select the user required.
- The **Edit User** screen displays with the **Details** tab selected.
- The **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 [18](#) for details.

Licence Manager

Licence Manager is a web-based tool which allows practice administrators to manage the licence allocation for **Vision Anywhere**.

From **Licence Manager** you can:

- View licensed devices.
- Revoke licences.
- View licence requests.
- Block devices from registering.
- View blocked devices.
- Unblock blocked devices.

Device Registration

Providing your practice has licences available, the first time a device successfully logs onto **Vision Anywhere** it is automatically registers with **Licence Manager**.

If licences are not available the user is informed of this, and the practice can either arrange additional licences, or revoke an existing licence using **Licence Manager**.

Once a device has been registered, the licence remains associated with the device until it is revoked, or there is a factory reset on the device.

On login **Vision Anywhere** checks there is a valid registration for that device.

Using Licence Manager

Licence Manager is hosted in a secure cloud environment.

To access **Licence Manager**:

1. Select the following link, or type it into your internet browser:
<https://patienthublicencemanager.azurewebsites.net>
2. Enter the **Email** and **Password** details provided by **Cegedim Healthcare Solutions**.
3. Select **Sign in**.
4. The **Licensed** tab displays. All the devices currently registered with the practice display, including an at a glance summary of how many

licences you have in total and how many are used .

Licence Manager - INPS Test Practice 4

Karen Webster

Sign out

Licensed

850/900

Requests

10

Blocked

0

Block

Revoke

Device Name	Device Identifier
iPad (2)	302e0e6b-08ca-4c1b-9748-685d4ae9ecbc
. . (Galaxy Tab S)	32048adf81a6c001
5JXANN's iPhone	31d0a493-7860-4c2a-b9bd-6b56ea68fd32
5jxjser03's iPhone	1af0cae-7517-413d-90a0-f5ed1fd3922f
7A5B3DPCJD73KF2	24dc0363-1f57-49f3-8705-c25166910f63
7a5b3servctxtest	707b9ec1-def4-48d2-a5da-32c1ee963cf0

The following actions are carried out from the **Licence** tab:

Revoking a Licence

If a registered device is no longer in use, the licence should be revoked:

- From **Licence Manager**, highlight the device no longer required and select **Revoke**:

Licensed 850 / 900

Requests 10

Blocked 0

Block

Revoke

Device Name	Device Identifier
iPad (2)	302e0e6b-08ca-4c1b-9748-685d4ae9ecbc
. . (Galaxy Tab S)	32048adf81a6c001
5JXANN's iPhone	31d0a493-7860-4c2a-b9bd-6b56ea68fd32
5jxjser03's iPhone	1afc1cae-7517-413d-90a0-f5ed1fd3922f
7A5B3DPCJD73KF2	24dc0363-1f57-49f3-8705-c25166910f63
7a5b3srvctxtest	707b9ec1-def4-48d2-a5da-32c1ee963cf0

Highlight the device and select **Revoke** to remove it

Highlight the device
and select **Revoke**
to remove it

The number of licences used is reduced by one.

 **Note** - This does not stop the device from registering again, if a licence is still available.

Blocking a Device

If a registered device has been lost or stolen, you should block the device in order to prevent unauthorised access to **Vision Anywhere**:

- From **Licence Manager**, highlight the device to block and select **Block**:

Licensed 850 / 900Requests 10Blocked 0

Device Name	Device Identifier
iPad (2)	302e0e6b-08ca-4c1b-9748-685d4ae9ecbc
. . (Galaxy Tab S)	32048adf81a6c001
5JXANN's iPhone	31d0a493-7860-4c2a-b9bd-6b56ea68fd32
5jxjser03's iPhone	1afc1cae-7517-413d-90a0-f5ed1fd3922f
7ASB3DPCJD73KF2	24dc0363-1f57-49f3-8705-c25166910f63
7a5b3servctxtest	707b9ec1-def4-48d2-a5da-32c1ee963cf0

BlockRevoke

Highlight the device and select **Block** to block it

Highlight the device and select **Block** to block it

It is removed from the list and the licence is released.



Note - If the user is a member of a shared service and a practice, the device has licenses for each organisation, they must be blocked by all organisations.

Blocked Tab

The **Blocked** tab displays a list of all devices currently blocked.

If a lost device has been found, you can unblock it by highlighting the device and selecting **Unblock**. The device is registered again the next time **Vision Anywhere** is used, providing licences are available.

Requests Tab

The **Requests** tab displays a list of device licence requests that could not be fulfilled due to no licences being available.

At present, you cannot reallocate licences between devices. If there are more requests than available licences, you can either revoke an existing licence or arrange more licences.

Licensed	856 / 900	Requests	10	Blocked	0	Block
Device Name	Device Identifier					
GT-I9195	356425059512946					
HBMEKE-VERFLAP6.CompanyNet.org	01-00-C8-C3-02-00-92-63-03-00-6C-E6-09-00-E0-8C					
lnpelaptop250	4ac5e8ec-ad6c-49e5-ad8f-237d7a5809eb					
INPS-PC014	03-00-5C-2A-05-00-29-10-05-00-30-AD-06-00-01-00-04-00-CC-2A-04-00-4D-49-01-00-BC-1C-02-00-EA-AE-09-00-44-6C					
iPad	9df95550-62ce-417f-b807-1b836cc5620a					
iPhone	6056fe7a-edf6-43b0-83d7-eccf248e563a					
iPhone	2e0c6f41-13e9-4061-aff6-8336655ca15f					



Important - You can block a device from the **Requests** tab to prevent it from requesting a licence again. This should be done if the device is not known to the practice.