Vision Anywhere for Windows Desktop

Supplementary Guide for Shared Care Services

Version 4.2

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cegedim
Healthcare Solutions

Contents

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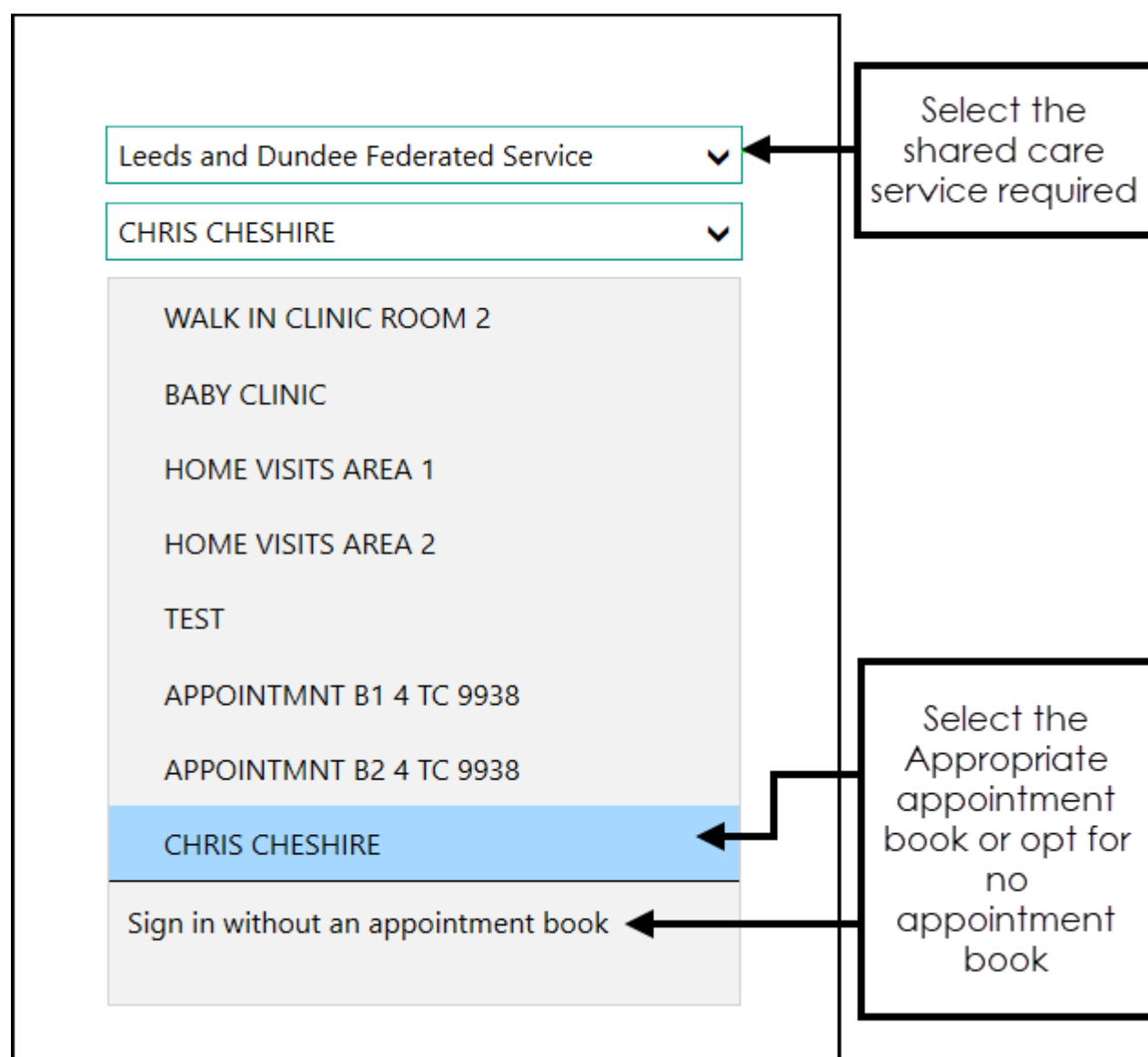
- **Registration Status** - Patients with either a permanent or applied status are available, although this depends on your sharing agreement.

- **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:
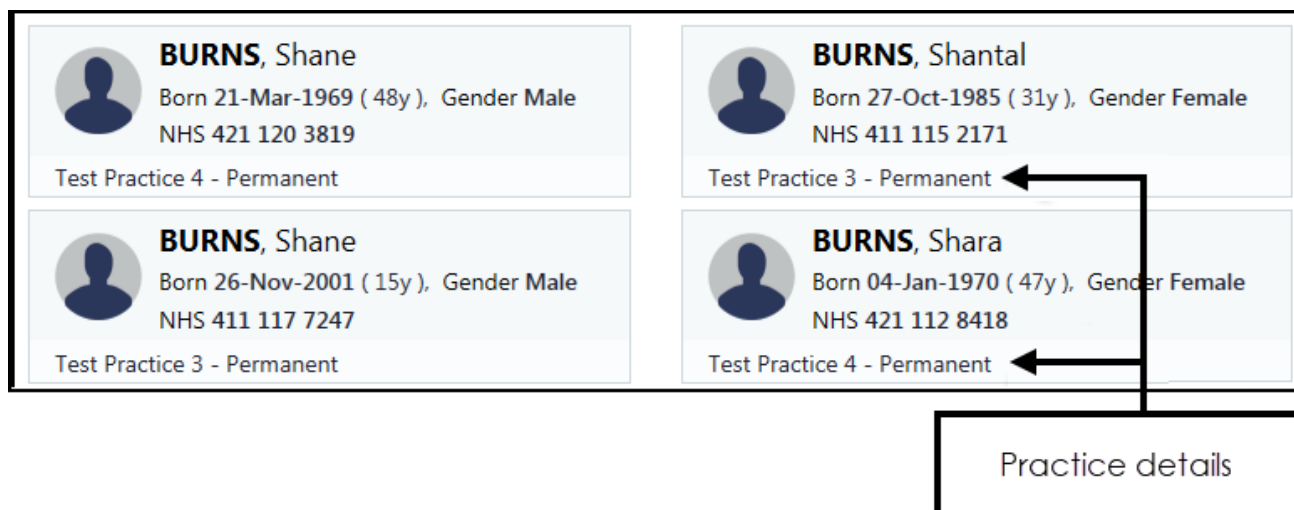
- **Acute Printing/Re-printing** - In a shared care setting, you can print and reprint acute prescriptions. For **Vision 3** patients you can also issue, print and reprint repeats.
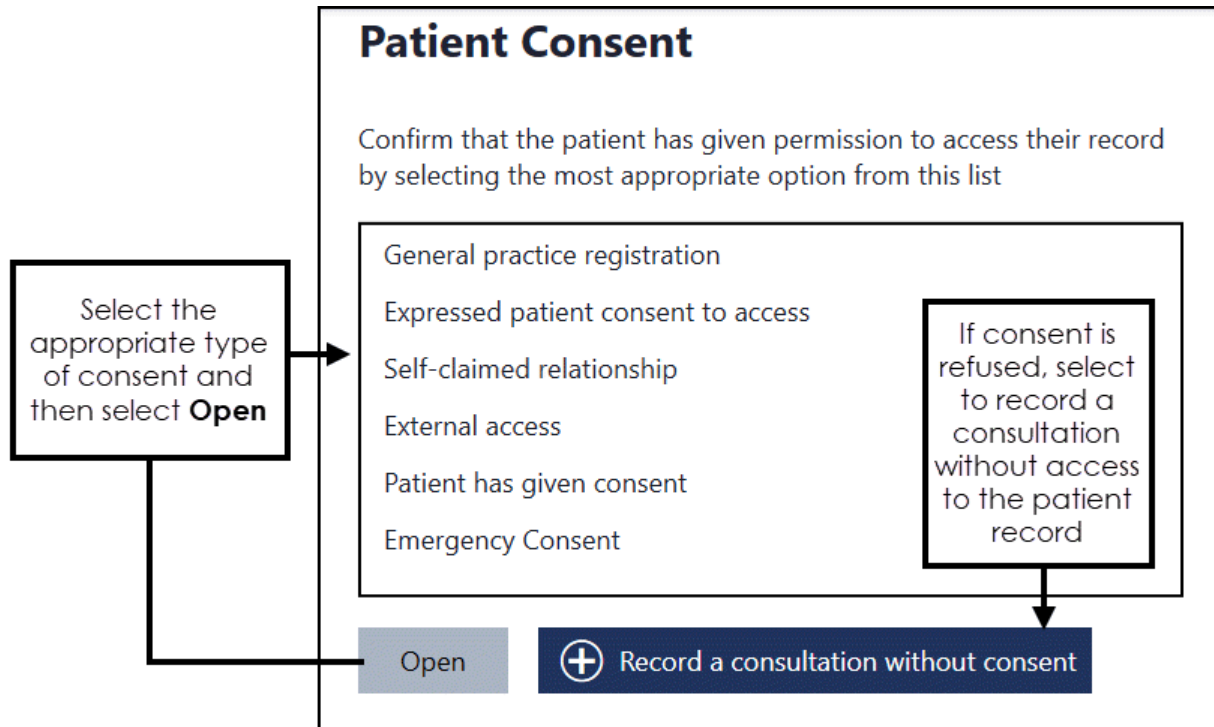
- **Repeat Medication Management** - Full repeat medication management is available for **Vision 3** registered patients.

- **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:

Patient Consent

Confirm that the patient has given permission to access their record by selecting the most appropriate option from this list

Select the appropriate type of consent and then select **Open**

General practice registration

Expressed patient consent to access

Self-claimed relationship

External access

Patient has given consent

Emergency Consent

If consent is refused, select to record a consultation without access to the patient record

Open

⊕ Record a consultation without consent

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.

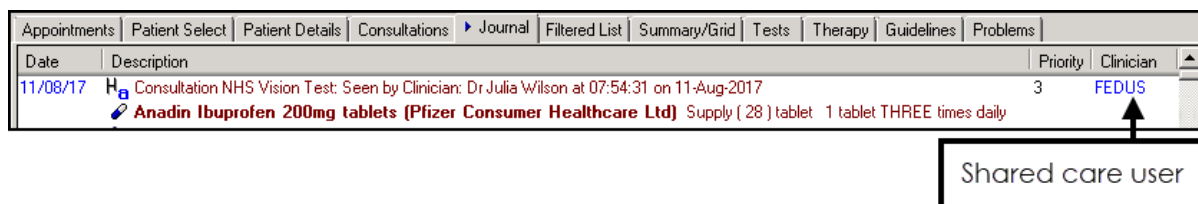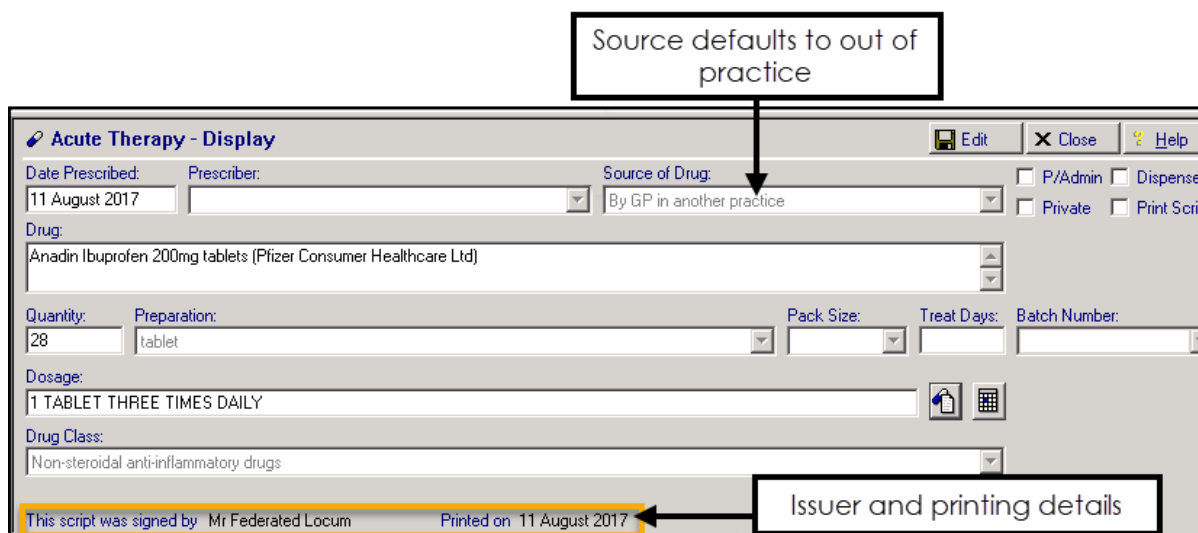If appropriate, select **Record a consultation without consent** to proceed.

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**.

Shared care user

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

Source defaults to out of practice

Issuer and printing details

✏ **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:

The consultation details display in the journal as normal:

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:

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) for full **Organisational Services** details.
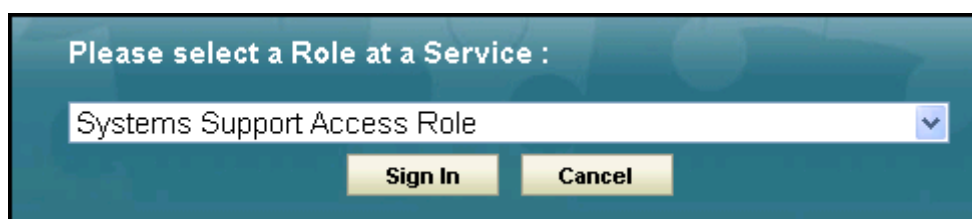

Adding a Shared Care User

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.
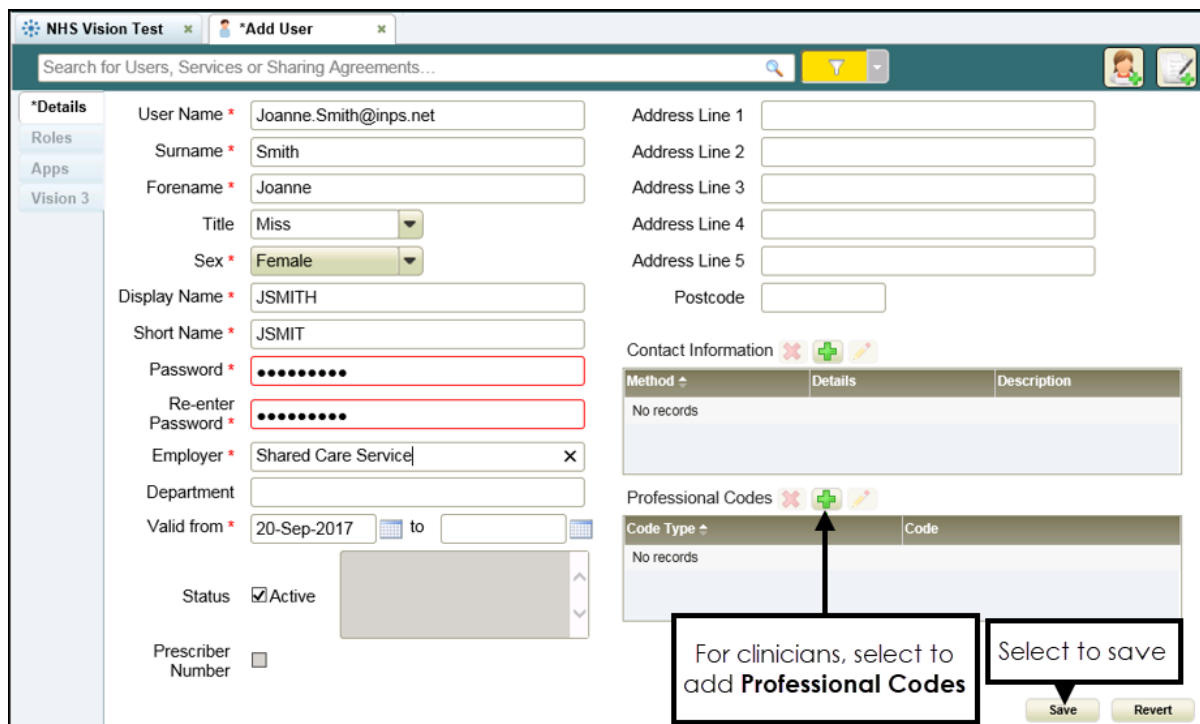
Now complete the following as required:

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:

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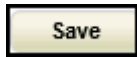
4. For clinicians we recommend you add any relevant **Professional Codes**, for example, a GMC code:

Adding a Professional Codes

1. From **Professional Codes**, select **Add** [icon].

2. The **Professional Codes** screen displays:

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** [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**:
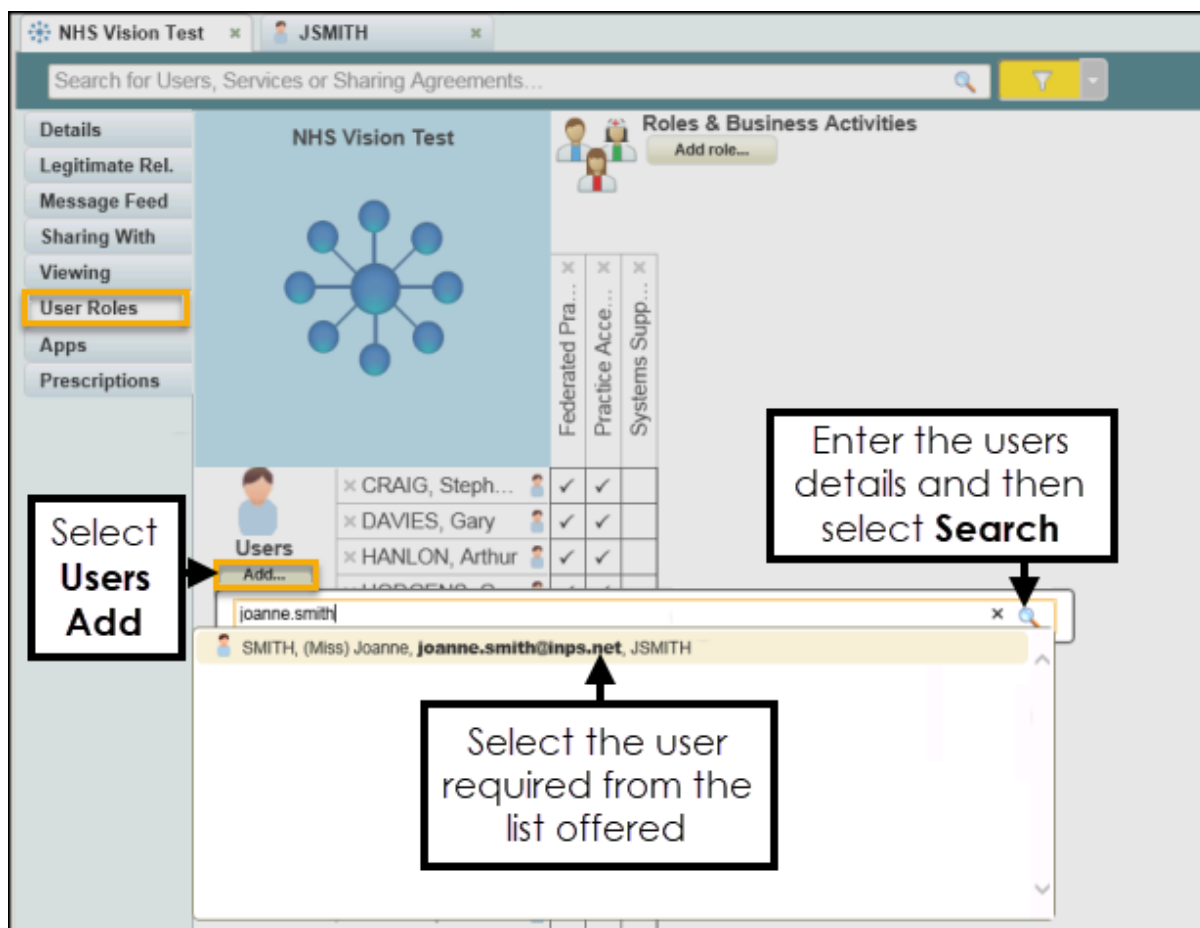
3. Select **Users Add....**

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:**
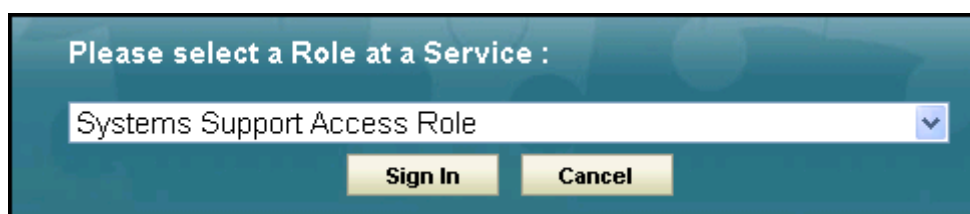
Sign in with your Vision ID

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 :
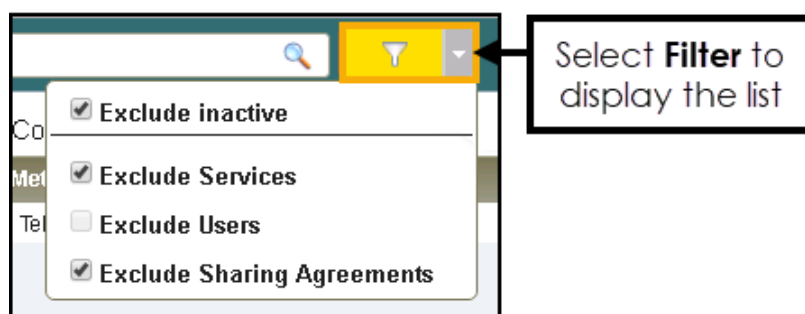
Systems Support Access Role

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**

☑ Exclude inactive

☑ Exclude Services

☐ Exclude Users

☑ Exclude Sharing Agreements

Select **Filter** to display the list

✎ **Note** - By default the filter excludes inactive users. Untick **Exclude inactive** to search on all users.
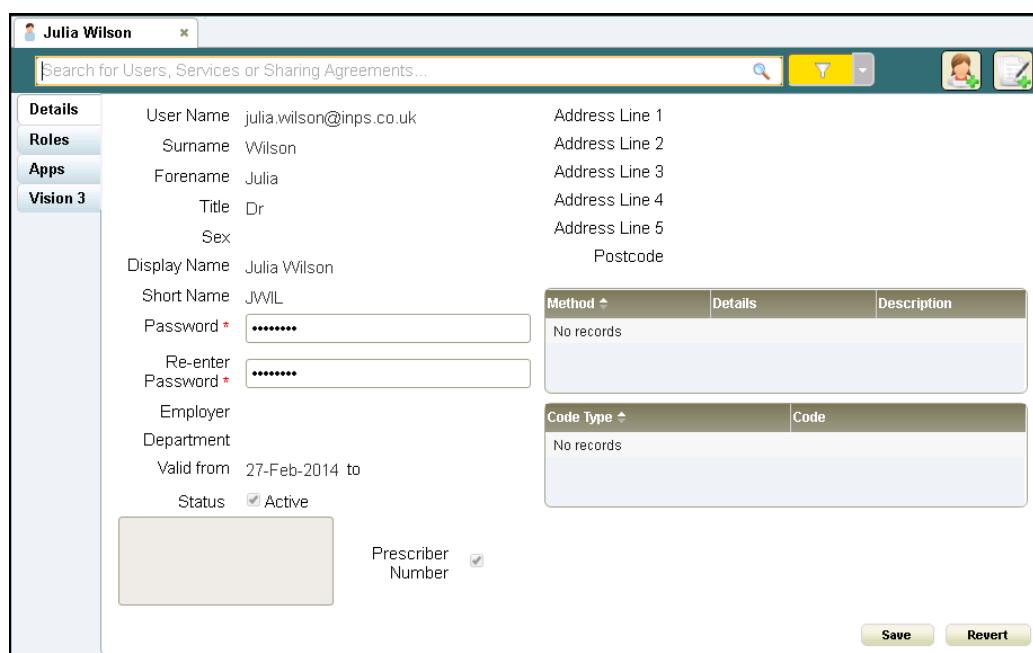
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7. Enter a minimum of two characters from either the surname, forename, username, display name or employer in **Search** and select **Search** :

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

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

![arrow] 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**:
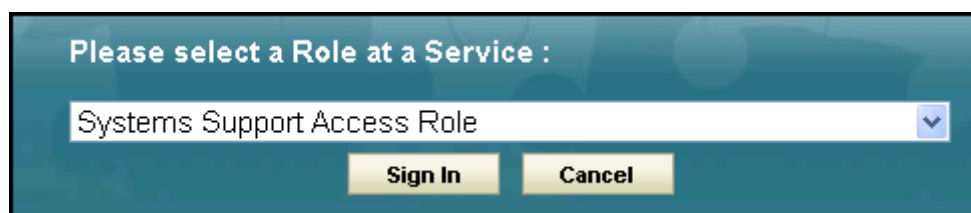

3. Select your **Systems Support Access Role**:

4. Select **Organisational Services** .

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

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

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:
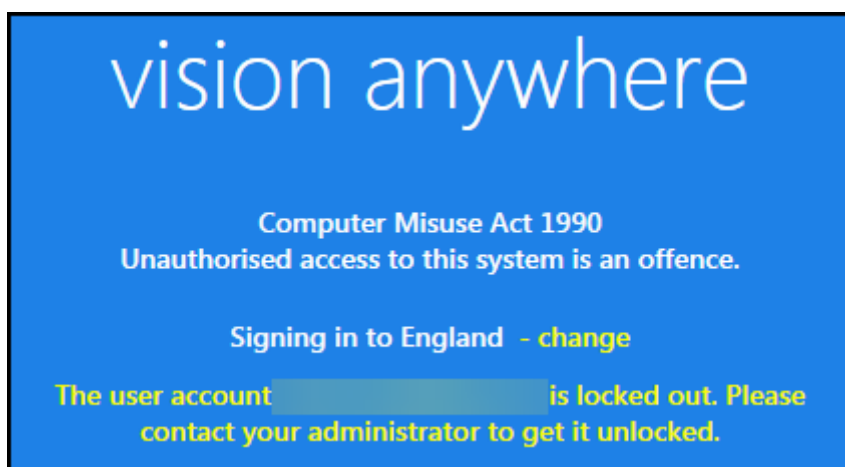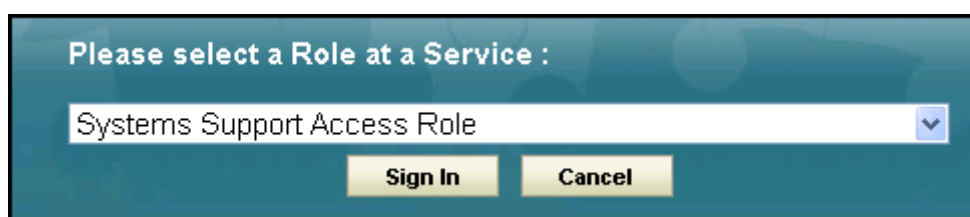

To unlock a shared care user's account:

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** .

5. In the search box, type part of the locked user's name or email and select **Search** 🔍 :
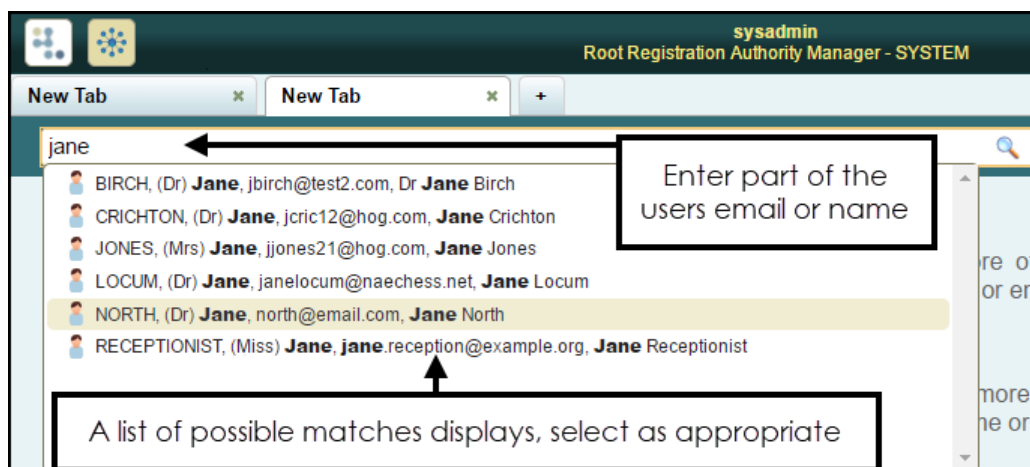
6. All matching results display, select the user required.
7. The **Edit User** screen displays with the **Details** tab selected.
8. The **This account has been locked after three failed access attempts** message displays at the top of the **Details** screen:
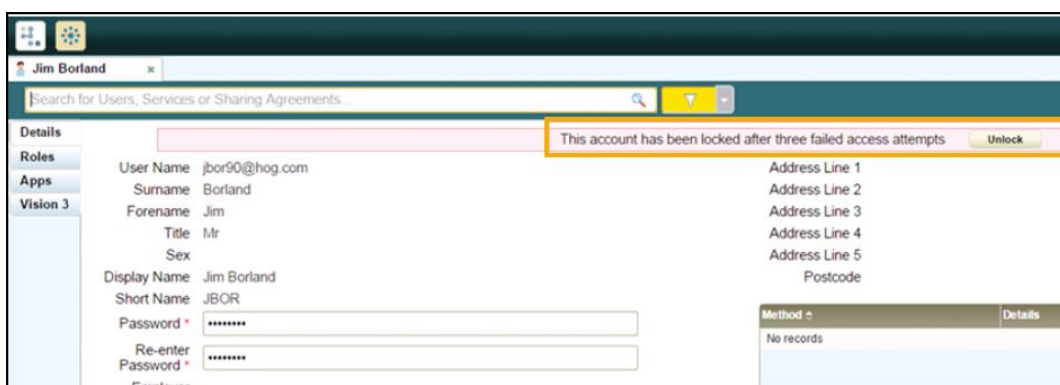
9. Select **Unlock** .

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 :

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**:

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**:

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.

Device Name	Device Identifier
GT-I9195	356425059512946
HBMEXE-VERPLAP6.CompanyNet.org	01-00-C8-C3-02-00-92-63-03-00-6C-E6-09-00-E0-8C
inpslaptop250	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-edf6-43b0-85d7-eccf248e563a
iPhone	2eec6f41-13e9-4061-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.