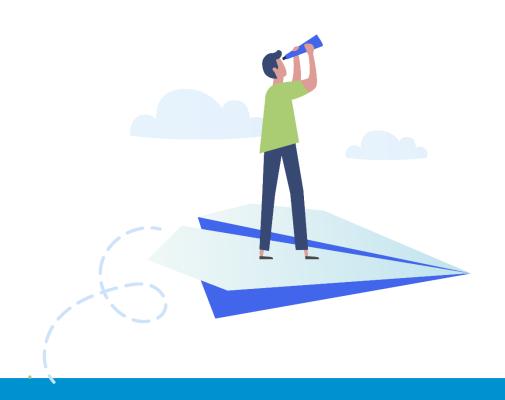


Vision Anywhere for Windows Quick Reference Guide

For Vision Anywhere Release 3.9

20th February 2024

v1.1







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Contents

| / | ision Anywhere Quick Reference Guide for Release 3.9 | 4 |
|---|---|-----|
| | Vision Anywhere for Business Continuity | 4 |
| | Summary of Record Availability in Vision Anywhere Business Continuity | 6 |
| | Logging in to Vision Anywhere | 8 |
| | Navigating the Home Screen | .11 |
| | Appointments List | .13 |
| | Finding a Patient | .15 |
| | Recent Patients | .16 |
| | Patient Summary | .17 |
| | Filtering the Patient's Record | .19 |
| | 3 Quick Steps to Adding a Consultation | .21 |
| | Adding Clinical Data | .24 |
| | Recording Medication | .26 |
| | Viewing a Patient's Allergies | .30 |
| | Prescription Printing | .31 |
| | Templates and Calculators | .33 |
| | Why Should I Close Encounters? | .34 |
| | Signing Out of Vision Anywhere | .36 |



Vision Anywhere Quick Reference Guide for Release 3.9

Vision Anywhere for Business Continuity

Business Continuity provides a valuable service in the unlikely event of your clinical system being unavailable.

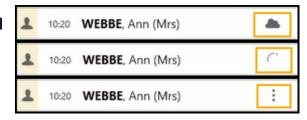
Vision Anywhere is set by default to automatically start when you log on to your computer. This is designed to prompt you to log on to **Vision Anywhere** which allows business continuity processes to run.

Important - You must log on to Windows as yourself, this facility does not work with shared Window log ins.

Clinicians

Once you log into **Vision Anywhere** and select your appointments book, the records for patients in your appointments list, for seven days either side of today, automatically download. You can see this happening, the **Cloud** next to a patient name in your appointment list turns into a **Spinner** when downloading and then into an **Option menu** when finished, it has no impact on you using **Vision Anywhere** in the usual way:

- Awaiting Download
- Downloading
- Downloaded



Administrators

When you log into **Vision Anywhere**, if you want to initiate an appointment download, for example to download the appointments of a book owner who is on leave, you must select the appointment book required. Only the selected book owner's appointment list patients download, if you change appointment list, the previous book owner's downloaded data is overwritten and the newly selected book owner's data now downloads.



Not using Vision Anywhere today?

You must log in every day to ensure downloaded patients are kept up to date. After logging in, if you do not want to use **Vision Anywhere** at the moment, you can either:

• Select **Minimise** from the top right of the **Vision Anywhere** screen to leave it on your task bar at the bottom of the screen, or

• Select Close from the top right corner of the Vision Anywhere screen. This leaves Vision Anywhere running in your system tray which allows the business continuity solution to continue running in the background.

You can quickly see if you are currently logged in from your toolbar:

• The **Vision Anywhere** symbol is green when you are logged in:



The Vision Anywhere symbol is grey when you are logged out:



Updating Vision 3

When connectivity to **Vision 3** is restored you must log into **Vision Anywhere**, this triggers the upload of the recorded consultations which updates your **Vision 3** system. Please check all **Encounters** are closed, if an encounter is left open the details are not sent to **Vision 3**.

Important - Any open Encounters or Encounters saved on your device automatically delete after 90 days.

Please refer to <u>Business Continuity</u> in the **Vision Anywhere 3.9 Help Centre** for full details.



Summary of Record Availability in Vision Anywhere Business Continuity

| Available | Internet Outage | Vision 3 Unavailable | Data Centre Issue | Power Cut |
|-----------------------------|---|-------------------------|----------------------|--------------|
| All current patient records | No * Unless alternative Wi-Fi available | No | No | No * |
| Downloaded patient records | Yes * | Yes* | Yes * | No * |

- No * All current patient records are available from Vision Anywhere Mobile.
- Yes * You need to log into Vision Anywhere daily and select your
 appointment book to trigger the automatic download of the patient
 records in your chosen appointment book, this is for seven days either
 side of today.

Saved Patient Encounters

These records are encrypted and stored locally on your device, they are not available from any other device. If you add data to a patient record, you must close **Vision Anywhere** and log onto **Vision Anywhere** on the same device within 90 days to trigger the upload to your **Vision 3** system, otherwise the data is deleted.

Important - The data is also deleted if you forget your password.



What is Unavailable when Working Offline?

The following functionality is unavailable when working offline, for example, an internet failure:

- Book appointments
- Change which service/role you have logged in with, or switch appointments book
- Print prescriptions
- Prescribing Decision Support
- Repeat Medication Management
- **Test Requesting** The ability to launch external system is not available without internet access.
- **eMED3** Restricted, only 'Issued by Hand' eMED3s can be created.
- Download new templates or calculators
- Referral Letters Your templates are not accessible.
- Correspondence



Logging in to Vision Anywhere

Important - If you are a Vision 3 user, you must have security access to both Consultation Manager and Appointments in order to log in to Vision Anywhere, see Available Vision Functions and default Access in the Management Tools Help Centre for details.

To log in to Vision Anywhere:



- 1. From your Windows Desktop, select Vision Anywhere
- 2. The first time you log into **Vision Anywhere**, you must select your country. Simply select from the list available:



- 3. Select Continue.
- 4. Select **Username** and enter your registered email address.

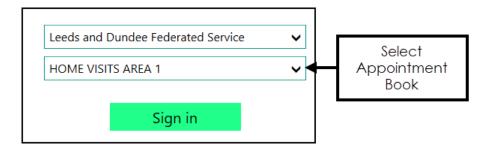


5. Select **Password** and enter your password:



Note - If you are a Vision 3 user, your registered email address is the one entered in Vision 3 - Control Panel - File Maintenance - Staff - Addresses - Communication Numbers. This is usually done by a system administrator at your practice.

- 6. Select Sign in.
- 7. Select the appointments book you want to work from, for example, you can select your name to see your appointments list, another member of staff or simply select **Sign in without an appointment book** from the list:



8. Finally, select **Sign in** to display the **Vision Anywhere Home** screen.



When you select **Sign in**, **Vision Anywhere** completes two connectivity checks:

- Internet connectivity check
- Services connectivity check

If either of these checks fails, the following message displays:

Signing in to - change

There was a problem signing in. Try again in a minute and if the problem persists, contact your administrator.

To log in offline:

- 1. Disconnect your device from the internet, either:
 - Select the WiFi symbol in your system tray , select your WiFi connection and select disconnect, or
 - Unplug your ethernet cable.
- 2. Wait for 30 seconds while your device recognises there is no internet access and then log in to **Vision Anywhere** again.

You are now logged on to **Vision Anywhere** off line. You can access the patients stored locally.

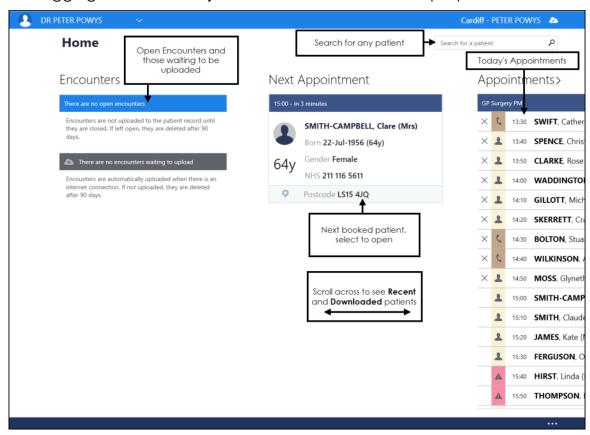
Once services are available again, you can reconnect your device to the internet.

Remember - Any open Encounters or Encounters saved on your device automatically delete after 90 days.



Navigating the Home Screen

After logging into Vision Anywhere, the Home screen displays:



The **Home** screen displays the following:

Encounters:

- Open patient encounters Encounters that have not been closed and are therefore not uploaded.
- Closed patient encounters Any encounters that are closed and are waiting to be synchronised at the next log on, when an internet connection is established.

Next Appointment:

 The next appointment you have scheduled, this is determined by the time on your device.



Appointments:

- Displays today's booked appointments.
- Past appointments (last 7 days).
- Future appointments (7 days ahead).



Downloaded Patients:

Patients currently stored on your device for offline access.

Search for a Patient:

- Find any of your registered patients.
- Select a patient name to open the patient record.



See Finding a Patient on page 15 for details.

Show Patient Contact Details:

View patient demographic information.

Other Options:

If you select the arrow next to your name the following menu options display:

- **Settings** Select to access preferences for decision support, printing and encounter settings.
- **Sign out** Select to sign out of **Vision Anywhere**.

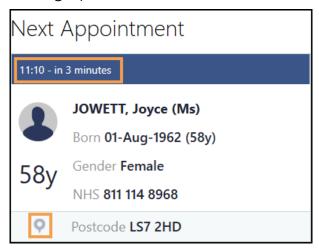


Appointments List

The **Vision Anywhere Home** screen automatically displays your next booked appointment and a list of appointments booked for today from your selected book.

Next Appointment

Your next appointment displays with the booked time and a count down, along with patient demographic information:



Note - The next appointment is determined by the time on your device.

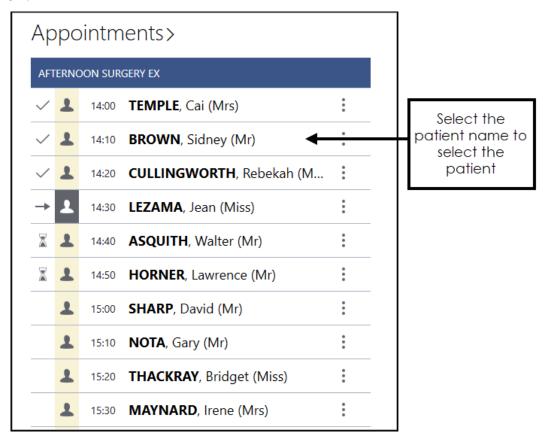
From the **Next Appointment** section, you can:

- Select the patient's name to open their record.
- Select **Map** to display the patient's address in map form.



Appointments

The **Appointments** list initially displays your current or next appointment session:



To select a patient from the list, simply select their name.

The following symbols display to the right of the patient name:

- Patient Record downloaded Select to access patient demographic details, DNA information and patient notes, for example, Needs wheelchair access.
- Patient not yet downloaded Indicates the patient record has not been downloaded.
- Appointment comments Select to display appointment comments, for example, reason for appointment.
- Special Booking Indicates the booking is for a non-registered patient.

Select **Appointments** Appointments to see the previous and next 7 days of your appointments book.

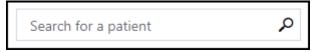
Once you sign in, providing you have an active internet connection, patient records for all of today's appointments in your selected book automatically download to your device.



Finding a Patient

Note - To select a patient outside of your booked appointments list, you must be connected to the internet.

1. From the **Vision Anywhere Home** screen, enter the first few letters of the patient's surname and forename with a space in between in **Search for a Patient**, for example, 'smi cli' to search for Clifford Smith:



You can also search for patients by:

- Date of Birth
- Postcode
- NHS/CHI Number
- Combination of surname and year of birth:

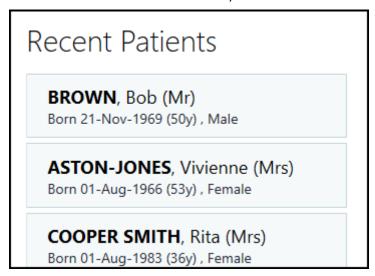


- 2. Select **Search** or press **Return** on your keyboard.
- 3. Patient tiles display the matching patients, select the required patient to view their record and start an Encounter.



Recent Patients

From your **Home** screen, **Recent Patients** displays your five most recently opened patients, these are retained across your sessions:

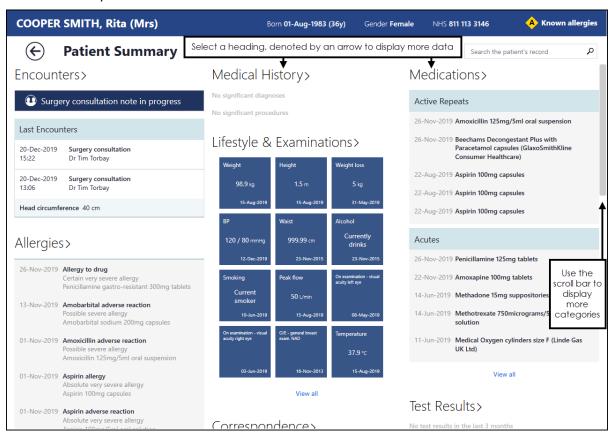


Note - In the event of the **Vision 3** system being unavailable, patient records cannot be accessed unless previously downloaded. If your practice system is offline, an 'Unexpected error - Remote service is unavailable' message displays when you try to access a patient.



Patient Summary

The **Patient Summary** screen gives a snapshot of all the essential clinical information you need:



You can scroll or swipe down the screen to see all the headings, these include:

Encounters

- New Encounter Select to create a new encounter and add data for the selected patient.
- Last Encounter Displays the date, type, data recorded and clinician for the selected patient's last encounter.
- Encounters in progress Displays open/unsynchronised encounters for the selected patient.

Select heading to see all previous encounters/consultations.

Medical History

- **Significant Diagnoses** Priority 1 & 2 medical diagnoses and **Problem** headers.
- Significant Operations Priority 1 medical histories in Read chapter 7.

Select heading to see all medical history entries.



Medications

- Active Repeats All active repeat medication.
- Acutes Last two years of acute medication.

Select heading to see all medication entries.

Allergies

Displays drug and non-drug allergies. If the patient has allergies recorded, the **Known Allergies** alert displays in the patient information banner at the top of the screen:



Select heading to see all entries.

Lifestyle and Examinations

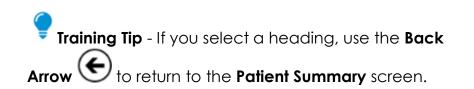
 Displays a collection of tiles providing an 'at a glance' view of the latest lifestyle and examination results.

Select heading to see all lifestyle and examinations entries.

Recent Test Results

Displays test results received in the last 3 months.

Select heading to see all test results entries.

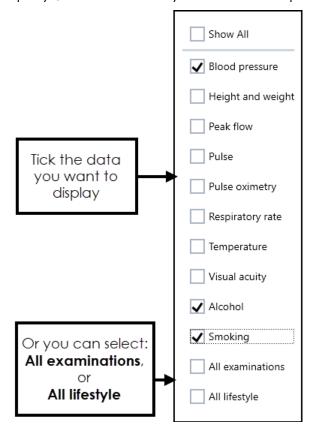




Filtering the Patient's Record

You can filter the data in **Vision Anywhere** to display specific items, for example, blood pressure and smoking, or apply date filters:

- 1. From the **Patient Summary** screen, select the category of data required, for example **Lifestyle & Examinations**.
- 2. Select either **Show more commands** in the lower right corner of the screen or right click anywhere on the screen.
- 3. A toolbar displays, select Filter Categories Filter categories
- 4. A filter pane displays, tick the items you want to display:



Note - The options change depending on which category of data you are viewing.

Note - If you are in the **Medical History** view and remove the tick next to **Problems**, you still see the Problem term in the view as the clinical term exists outside of the Problem.

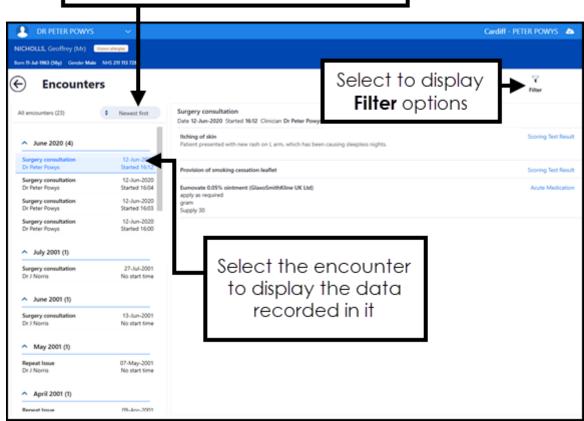


Filtering Encounters

To apply a filter to the **Encounters** list:

- 1. From the **Patient Summary**, select **Encounters**.
- 2. The **Encounters** screen displays. The list is in date order with the most recent encounter selected:

Filter options, select as required



Select **Filter** and from the filter options, select the encounters you require. You can filter by:

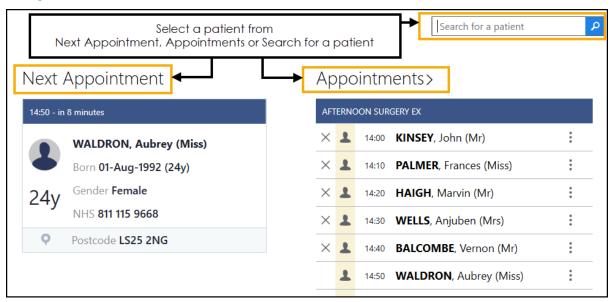
- Clinician
- Encounter Type
- Date Range

The filter applied, displays in orange ______. To remove the filter, select it and remove the tick(s) applied.



3 Quick Steps to Adding a Consultation

Step 1 - Select a Patient

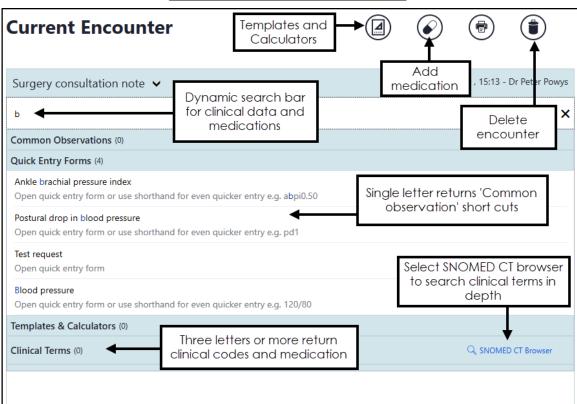


See Finding a Patient on page 15 for details.



Step 2 - Start an Encounter and add data

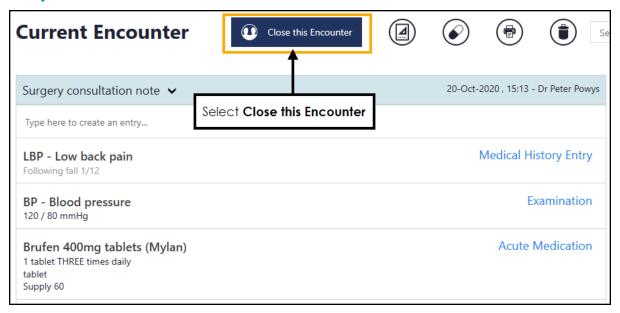




See Encounters on page 17 and Adding Clinical Data on page 24 for details.



Step 3 - Close the Encounter



See Why Should I Close Encounters? on page 34 for details.

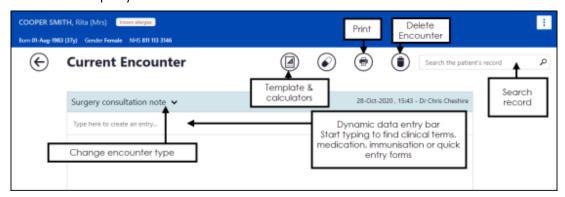


Adding Clinical Data

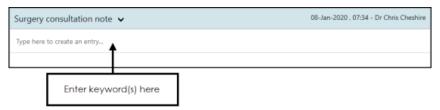
To add any type of clinical data to a patient record in Vision Anywhere:

Important - A patient record is not locked when you open an Encounter, other users can access and add to the same patient record at the same time.

- From Vision Anywhere, select the patient required and view their Patient Summary.
- 2. Select New Encounter screen displays:



3. Enter a keyword in the dynamic search bar:



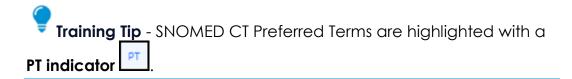
The keyword can be to:

- Record a drug, immunisation or clinical term
- Trigger a template or calculator.

A single letter triggers a common observation quick entry, three letters or more returns a pick list of clinical terms

There are some short cuts, for example, to quickly record a blood pressure, enter 120/80 and select **Blood pressure reading**.

4. Select the term required from the list and the relevant data entry form displays.





5. Complete the form as appropriate:



- **Description** Defaults to the term selected. You can change by searching an alternative term if required.
- Priority Defaults to 3, but you can select from 0-9.
- **Episode type** Defaults to **None**, select from the available list if required.
- Notes Enter any free text as required.



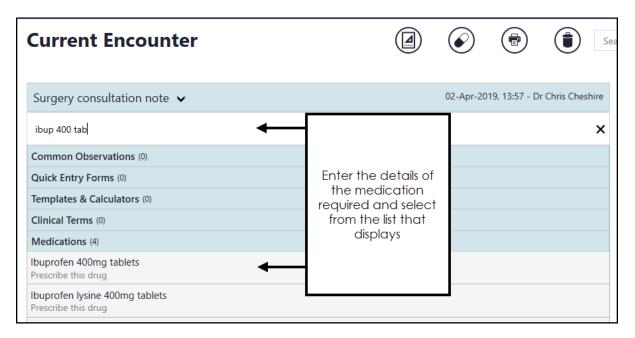


Recording Medication

Important - A patient record is not locked when you open an Encounter, other users can access and add to the same patient record at the same time.

To record medication, either:

 From Current Encounter with an encounter type selected, enter the details of the medication required. A combination of drug name, strength and form can be used to refine your search, for example, ibup 400 tab to find Ibuprofen 400mg tablets:



Or



1. From Current Encounter, select Add Medication and the Prescribe screen displays. Enter the details of the medication required, a combination of drug name, strength and form can be used to refine your search, for example, ibup 400 tab to find Ibuprofen 400mg tablets.

The following symbols next to the drug indicate:







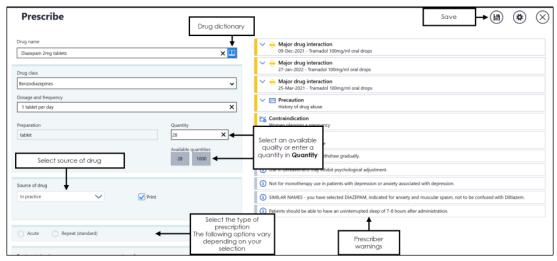






Note - Enter a minimum of three characters to trigger the list.

2. Select the medication required from the list and the **Prescribe** screen displays:



Complete as required:

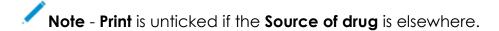
• **Drug class** - If required, update the Drug Class. You can search for an item by class using **Drug Dictionary** next to **Drug name**.



- Dosage and frequency The defaults populate from the Gemscript drug dictionary. Practice default dosages are not currently available.
- **Preparation** Completed in conjunction with the selected item.
- Quantity Select from the available quantities or enter directly.

Note - When adding a prescription for a controlled drug item, a warning displays in orange if you enter more than 30 days supply into **Quantity**. This utilises the calculated daily dose.

 Source of drug - Defaults to In practice, select from the available list to update if required.

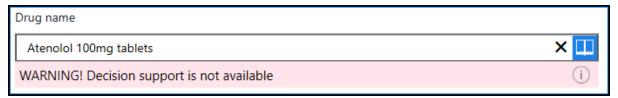


- **Print** Remove the tick to record a handwritten prescription.
- Repeat (standard) Select if you would like the item to be added as a repeat:
 - Sync with existing repeats Optional, tick to link the medication issue frequency and repeat until date, with the existing schedule.
 - Number of repeats Enter the number of repeats required.
 - Repeat Until Optional, select a date to repeat this medication until.
 - Also create an acute Optional, tick to create a separate acute prescription for this medication.
- Advice for the patient Enter any advice for your patient, this prints on the right hand side of the prescription and is copied to an acute item if created.
- Notes for the pharmacy/pharmacist Enter any notes for the pharmacist, this prints on the left hand side of the prescription and is copied to an acute item if created.



4. **Decision Support** and **Prescriber Warnings** display on the right of the screen and should be checked, select the warning to view the details:

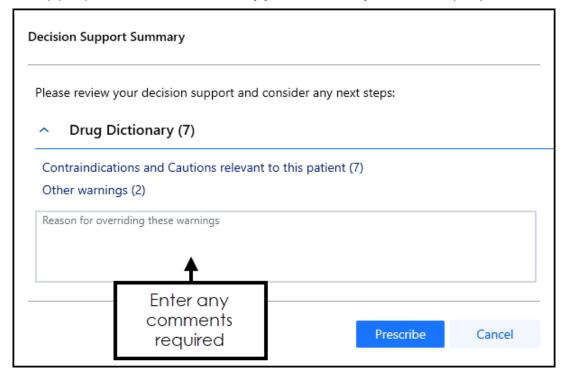
Note - You must be a **Vision 3** practice and have an internet connection for prescriber warnings to display. If you do not have an internet connection a 'WARNING! Decision support is not available' message displays:



Prescriber warnings depend on your **Prescribing Preferences** settings.

Note - If you are an existing **Vision 3** user your prescriber preferences do not automatically import and need to be configured in **Settings**.

- 5. Select **Save** to add the item to the patient record.
- 6. If appropriate the **Decision Support Summary** screen displays:



Note - There is no time frame for Decision Support, all medical history is included.



- 7. Enter any comments required in the **Reason for overriding these** warnings section.
- 8. Select Prescribe.

The item(s) are now part of your current encounter, select the **Current Encounter** screen to print.



Note - Non-FP10 medication cannot currently be prescribed from **Vision Anywhere**.

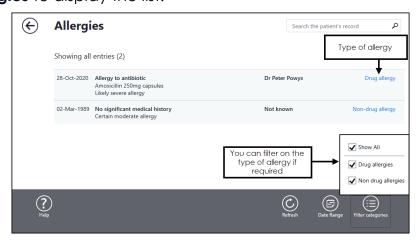
Important - Where an allergy, intolerance or adverse reaction with a Severity of Potentially fatal is added for a medication, you are prevented from prescribing it.

Viewing a Patient's Allergies

If a patient has allergies recorded the **Known Allergies** alert displays on their **Patient Banner** and they are listed under **Allergies** (**n** of **x**), where *n* is the number being displayed and **x** is the total number of allergies:



Select **Allergies** to display the list:



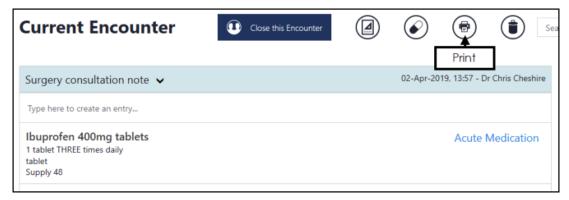


Prescription Printing

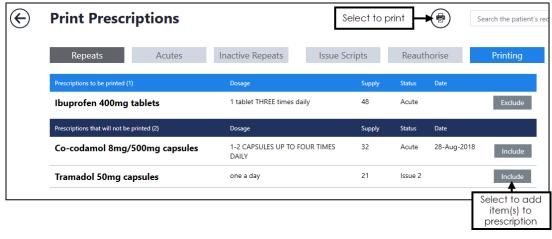
After adding acute(s) or issuing repeat medication, these can be printed from the either the main **Medication** screen or the current **Encounter**.

...from Current Encounter

1. After prescribing acute medication(s), select **Print** from the top of the Current Encounter screen:



 The Print Prescriptions screen displays. Acute medication from the current encounter available for printing displays under Prescription to be printed. To remove an item select Exclude to the right of the drug name:



- Any unprinted items such as repeat issues or acutes from other encounters, display under the **Prescriptions that will not be printed section**. To add these onto the prescription, select **Include** to the right of each drug.
- 4. Select **Print** to print the prescriptions, the **Printing Prescriptions** message briefly displays.
- 5. Select the **Back Arrow** to return to the current encounter.
- 6. Complete the consultation and close the encounter.



Note - If you have added a repeat master you need to close the encounter and then make an issue from the **Medications** view before you can print this. Alternatively, tick ' 'Also make an acute' to print an acute from the current consultation.

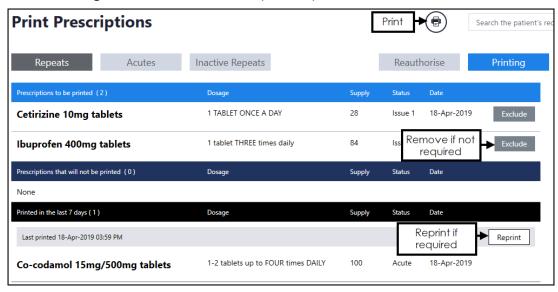
...from Medications View

This option can be used after issuing repeats or to print any unprinted medication.

1. Select the **Medication** view from the **Patient Summary** screen. If required, issue repeat medication.



- 2. Select **Printing** and the **Print Prescriptions** view displays.
- All unprinted medication is selected for printing and displays under Prescriptions to be printed. If required, select Exclude on the right of each drug to remove from the prescription:



- 4. Select **Print** to proceed, the **Printing Prescriptions** message briefly displays as the prescriptions print.
- 5. Select the Back Arrow to return to the Patient Summary.

Note - After an item is printed, even if the encounter is still open, a prescription cannot be edited or deleted.

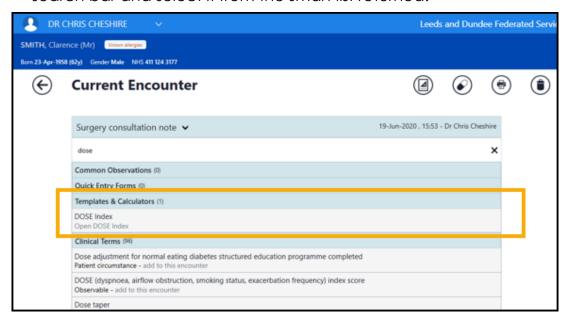


Templates and Calculators

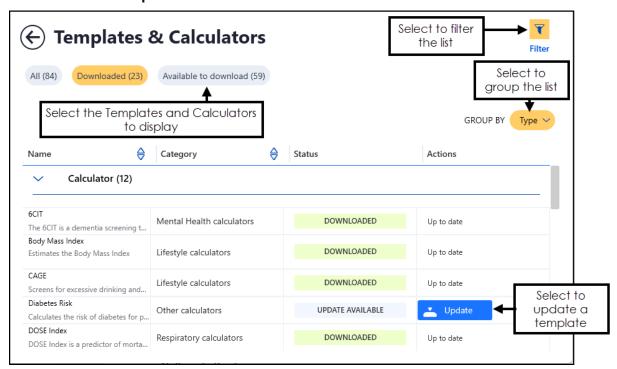
There are a number of data entry templates and clinical calculators available for you to download and use in **Vision Anywhere**.

Once downloaded, with a patient selected and from within an encounter you can either:

• Enter the name of the template you are looking for in the dynamic search bar and select it from the smart list returned:



Select Templates and Calculators to view the full list:





Why Should I Close Encounters?

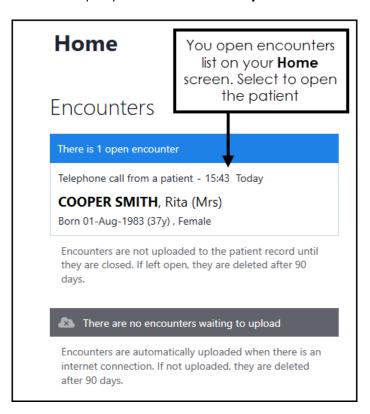
Closing consultations ensures that clinical data from **Vision Anywhere** successfully writes back to the patient record, ensuring patient record continuity, It is therefore really important that you close encounters when you finish adding data.

You may need to leave an encounter open, for example, if you need to come back to the patient record to add further data. However, when encounters are left open, they save to the device/workstation for 90 days only and can be accessed by logging into **Vision Anywhere** on that device as the user who created the encounter.

Important - Open encounters are not accessible from any other device or user account.

If you have forgotten to close encounters, you can easily check back and close them. To close an encounter that was left open:

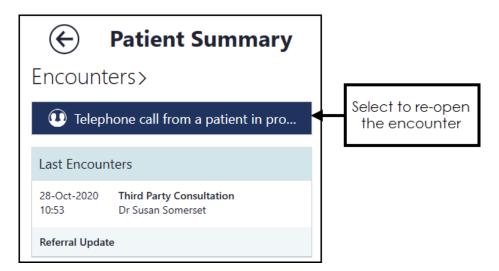
- 1. Login to Vision Anywhere.
- 2. Open encounters display on the **Vision Anywhere Home** screen:



3. Select an encounter to open the patient record.



4. The Patient Summary screen displays, select the encounter in progress:



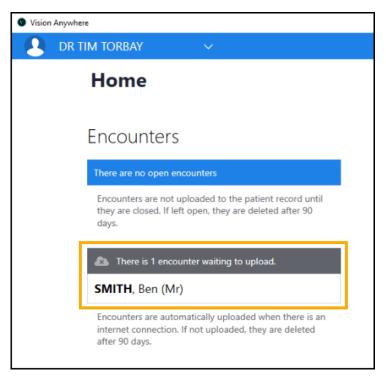
- 5. The details of the encounter display. Select **Close this Encounter**to save the clinical data back to the patient record.
- 6. Repeat this process for any other open encounters on the list.



Encounters Waiting to Upload

Unsynchronised encounters are those that are closed but have failed to writeback to the patient record. These display in the **Encounters Waiting to Upload** area on the **Vision Anywhere Home** screen. These, normally, resolve automatically when you launch the **Vision Anywhere** whilst connected to the internet.

If you see encounters in **Encounters waiting to upload** that do not automatically upload, please call the Cegedim Health Solutions Service Desk to resolve this:



Signing Out of Vision Anywhere

To close down Vision Anywhere:

- 1. From **Vision Anywhere**, select the arrow next to your name.
- 2. Select **Sign out**:

