

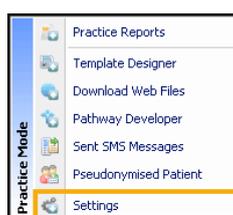
Quick Reference Guide - Configuration & Settings

There are several configuration settings that can help you to use **Vision+** in the most effective way for your practice. Changes made from within the settings screen are user specific. The only exceptions are the SMS, SMS Replies, Docman tab and the cervical recall period which are global to the practice.

Using the Settings Screen

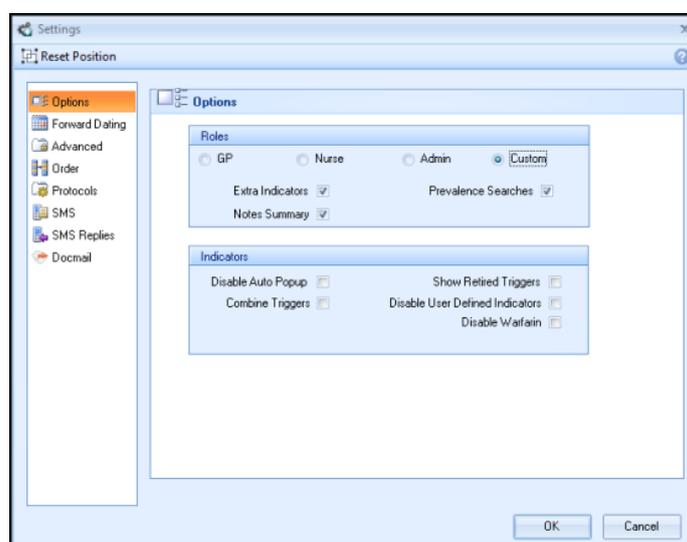
To access **Vision+ Settings**:

1. Log in to **Vision 3**.
2. From the **Windows Notification Area**, right click **Vision+**  and select **Settings**:



Note - To access the **Vision+ Setting** screen, you cannot have a patient selected in **Consultation Manager**, or you are only offered the patient-specific menu.

3. The **Settings** screen displays:

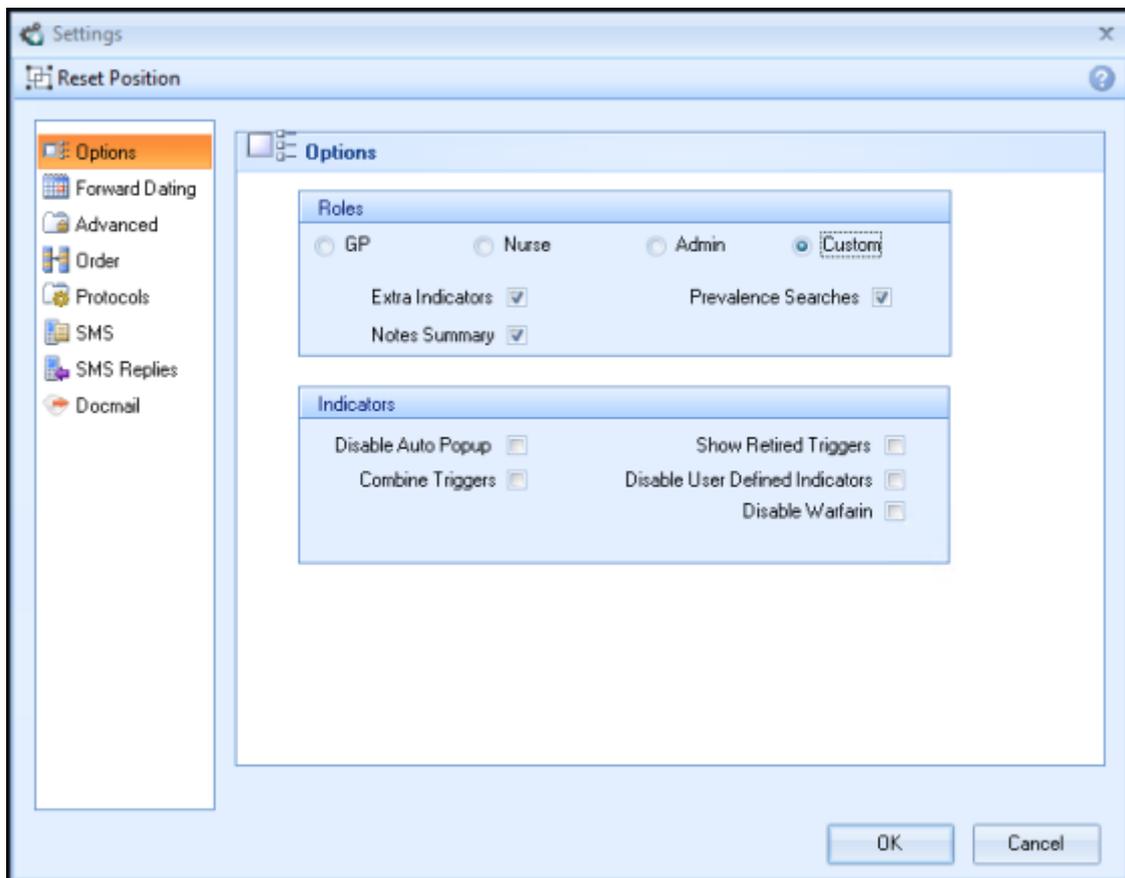


4. Make any changes required.
5. Select **OK** to save.

Reset Position

To reset the position of the contract indicator pop-up screen back to the default position:

1. With no patient selected, **Practice Mode**, right click on **Vision+** and select **Settings**.

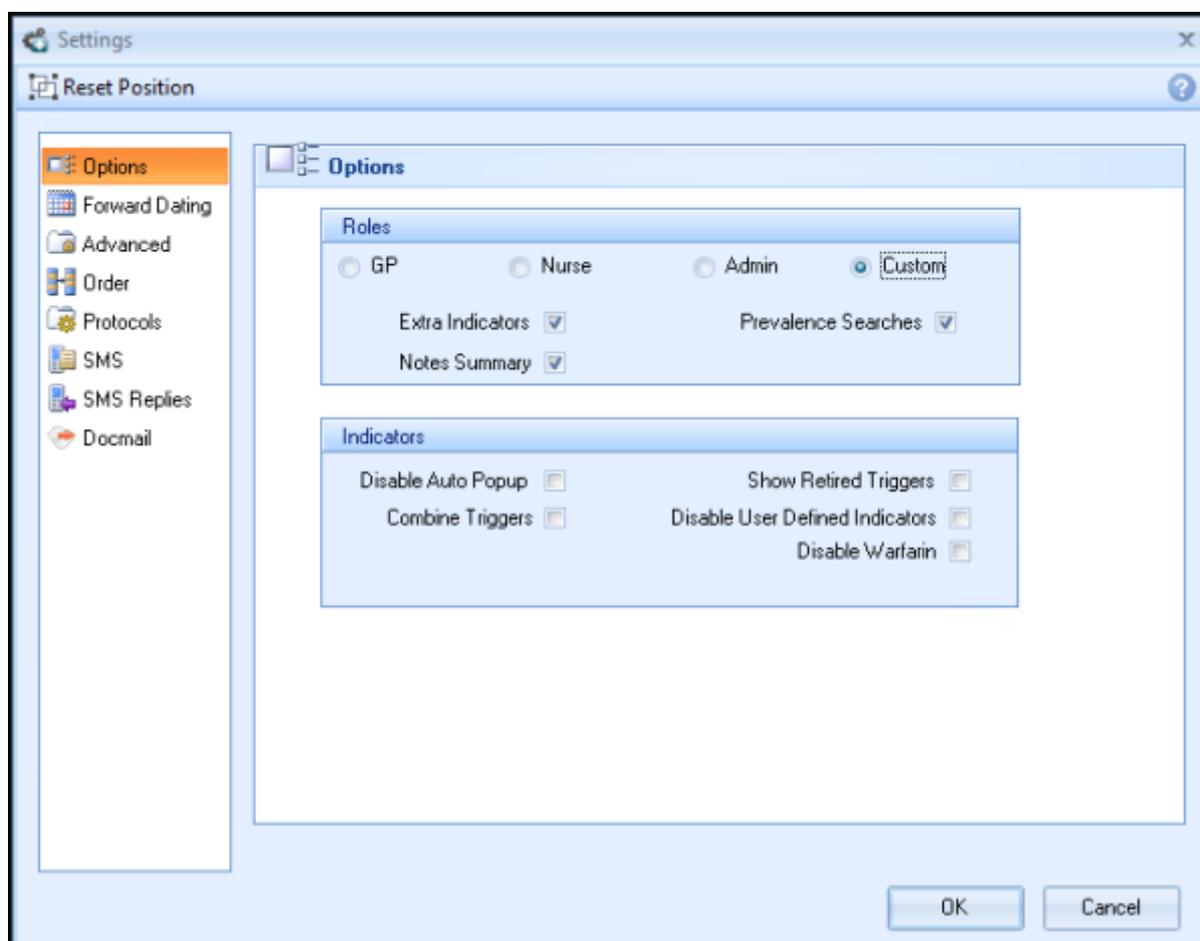


2. Select **Reset Position** .

This is especially useful if the contract indicator pop-up screen has been moved out of view of the screen.

Options Tab

The Options tab on the settings screen contains configuration parameters that dictate how **Vision+** behaves and displays on your screen. Please make sure that you are fully aware of what these settings are used for before you change them.



Options - Roles

The options available are listed below:

- **Extra Indicators** - Select this checkbox to view extra indicators which are used by the practice for recall purposes and to help monitor disease category recalls.
- **Prevalence Searches** - Select this checkbox to view tidy-up register searches.

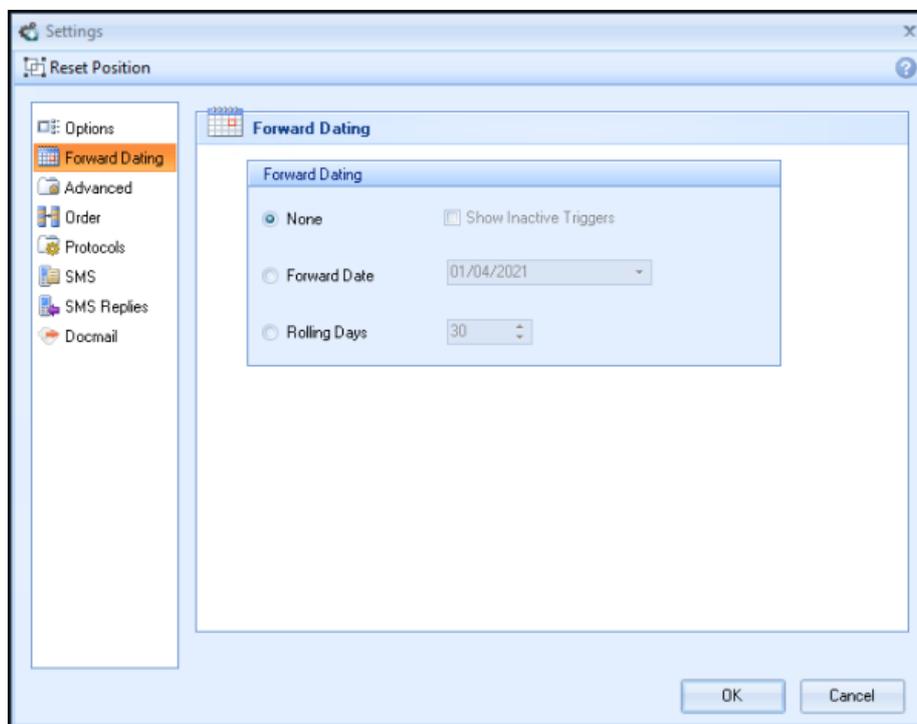
Options - Indicators

The options available are listed below:

- **Disable Auto Pop-up** – Select this checkbox to stop the indicator pop-up from automatically displaying on screen when opening a patient's notes during the consultation. When this option is checked the indicators can still be accessed from **Show QOF Indicators** .
- **Combine Triggers** - Select this checkbox to combine the QOF/QAIF and all the other buttons into one. This can help reduce the on-screen presence of the toolbar.
- **Show Retired Triggers** - Select this box if you want to display retired QOF/QAIF indicators in **Vision+** Alerts and Reports. QOF/QAIF Templates always display retired indicators regardless of the settings. This is to allow for easier exception coding.
- **Disable User Defined Indicators** - Select this box to disable the use of user-defined rules created using the Rule Designer.
- **Disable Warfarin** - If your practice has purchased the warfarin monitoring tool, you can remove the tick to disable access for the current user.

Forward Dating

The Forward Dating Tab within the Settings screen provides three different options for forward dating indicators. These options change the information you see displayed in the Contract Indicators, Contract Templates and Patient Target Lists (the reference date displays on these screens).



To change the forward dating, select from the following options:

- **None** – Only those indicators requiring completion as of today's date display.



Note - For each new QOF/QAIF year **Vision+** automatically reverts the Forward Dating option back to **None** (today's date). Depending on your practice preference you may want to change this per individual user login.

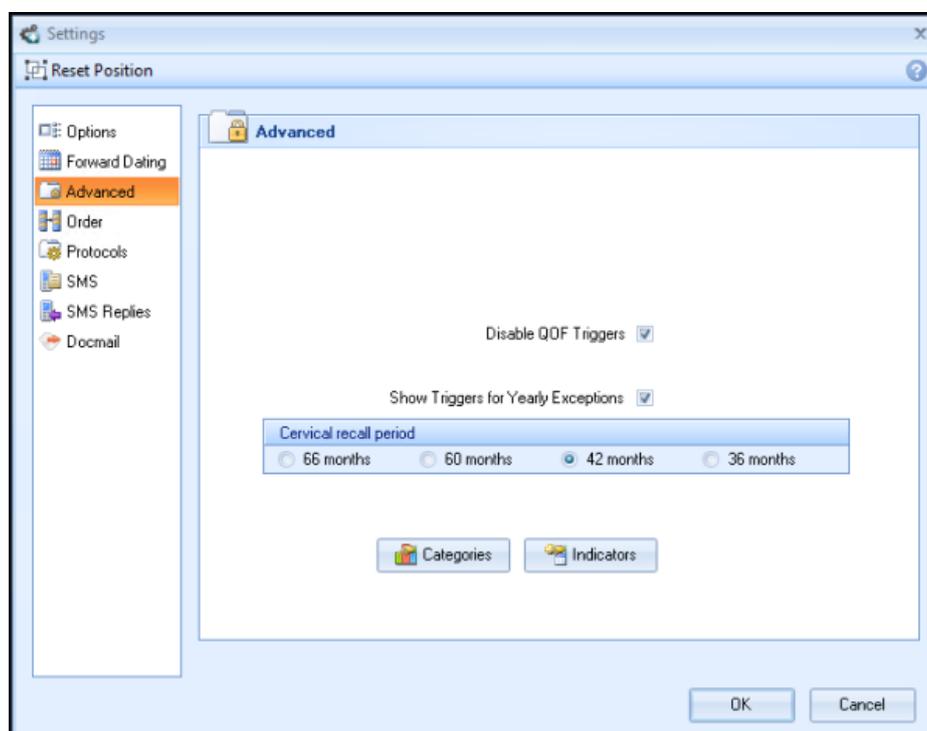
- **Forward Date** – Displays those indicators that have already been completed as of today's date, but will need to be re-recorded before a specified reference date. You can set this date using the date picker or by typing in a date.
- **Rolling Days** – Displays those indicators that have already been completed as of today's date, but will need to be re-recorded within a specific number of days ahead. You can set the number of days using the Days field.



Note - If you choose the Forward Date or Rolling Days option, you also are able to select the **Show Inactive Triggers** checkbox to display those items that will need recording in the future, but cannot be recorded within the specified time period. Depending on which option you have selected, the indicators appear in different colours in the other screens. For more information on the colour-coding of indicators, see [Colour-Coding of Contract Indicators](#).

Advanced Tab

The Advanced Tab is used to control advanced setting options. It includes the following:

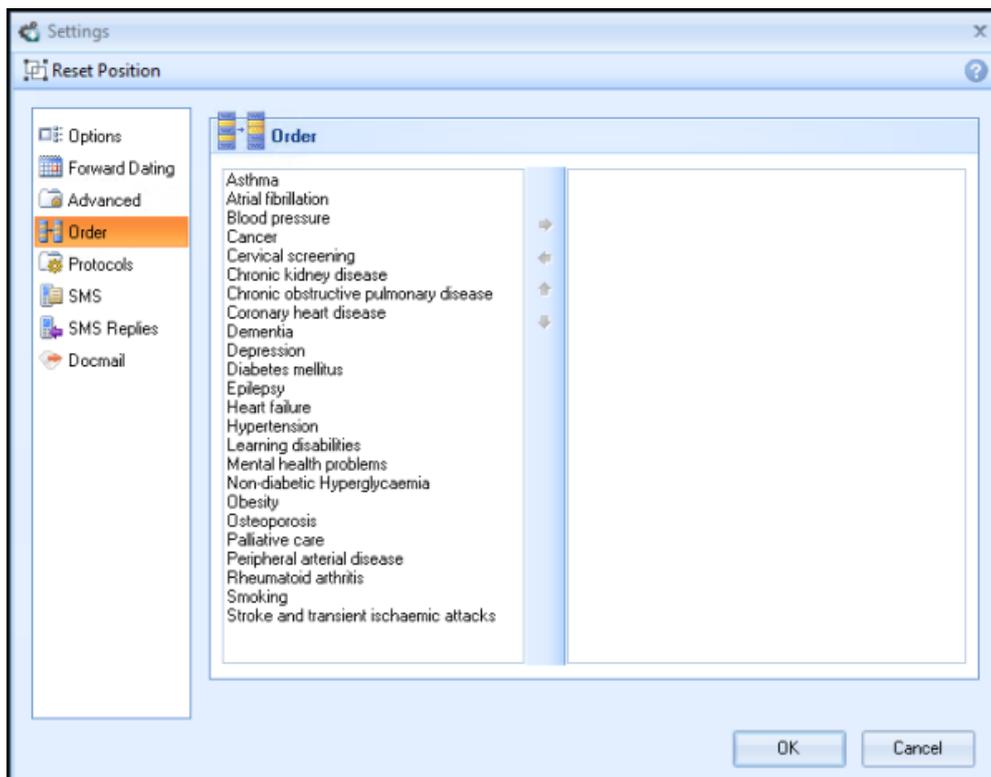


- **Disable QOF Triggers** - This option disables the QOF/QAIF triggers from showing, either on the toolbar or the Contract Indicators screen.
- **Show Triggers for Yearly Exceptions** - Select this checkbox to view any previously recorded exceptions for the current QOF/QAIF year. This is useful if you have previously used an exception code, but may want to record QOF/QAIF data later.
- **Cervical recall period** - This button determines how often cervical smears are required. This setting is set to every 5 years by default, but a small number of health boards require this to be done every three years. Please contact your Health Board if you are unsure.
- **Categories** - Selecting this button provides another screen where you can select which whole categories you want to display in the contract indicators screen by placing a check in the corresponding boxes.
- **Indicators** – Selecting this button provides another screen where you can specify which individual indicators within categories should be displayed in the contract indicators screen, in much the same way as the Categories button.

Order Tab

The Order tab of the Settings screen can be used to alter the order of the Contract Indicators. Normally the Contract Indicators are ordered alphabetically.

By moving some or all of the Contract Indicators from the left hand column to the right-hand column you can specify the order and bring more important indicators to the top of the list. Any Contract Indicators that are remaining on the left hand side of the screen are placed at the end of the list in alphabetical order. By default all Contract Indicators appear alphabetically in the left hand list, and are also displayed in this manner.



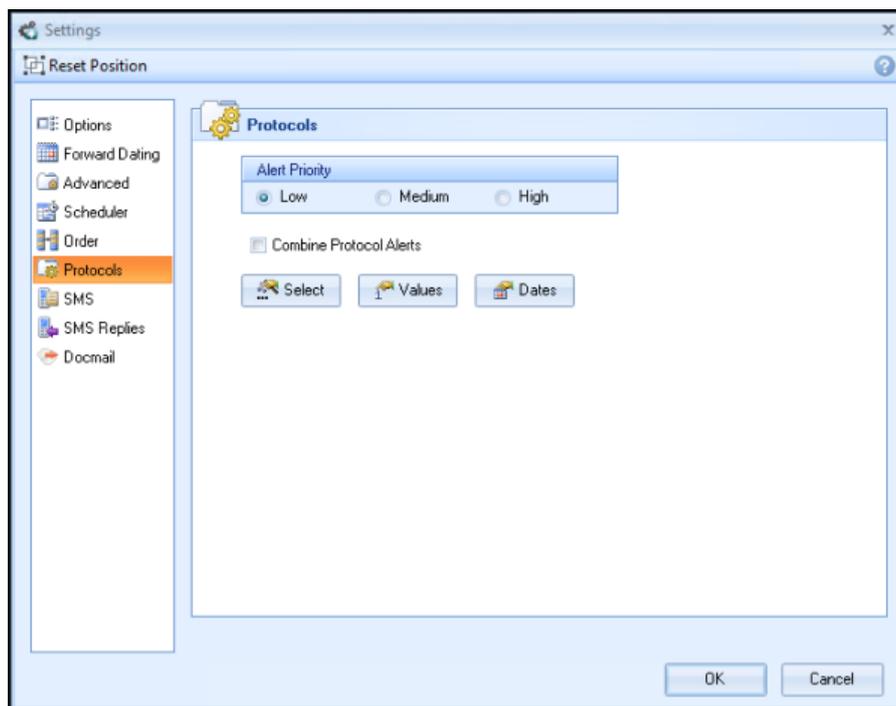
Protocols Tab

The Protocols Tab allows you to further customise the alert indicators by selecting whether to show high, medium or low priority indicators and whether or not you want to combine them.

This setting only applies to additional items that you have downloaded into your system, such as SIGN guidelines or NICE guidelines.



Note - All QOF/QAIF alert indicators are excluded from this configuration.

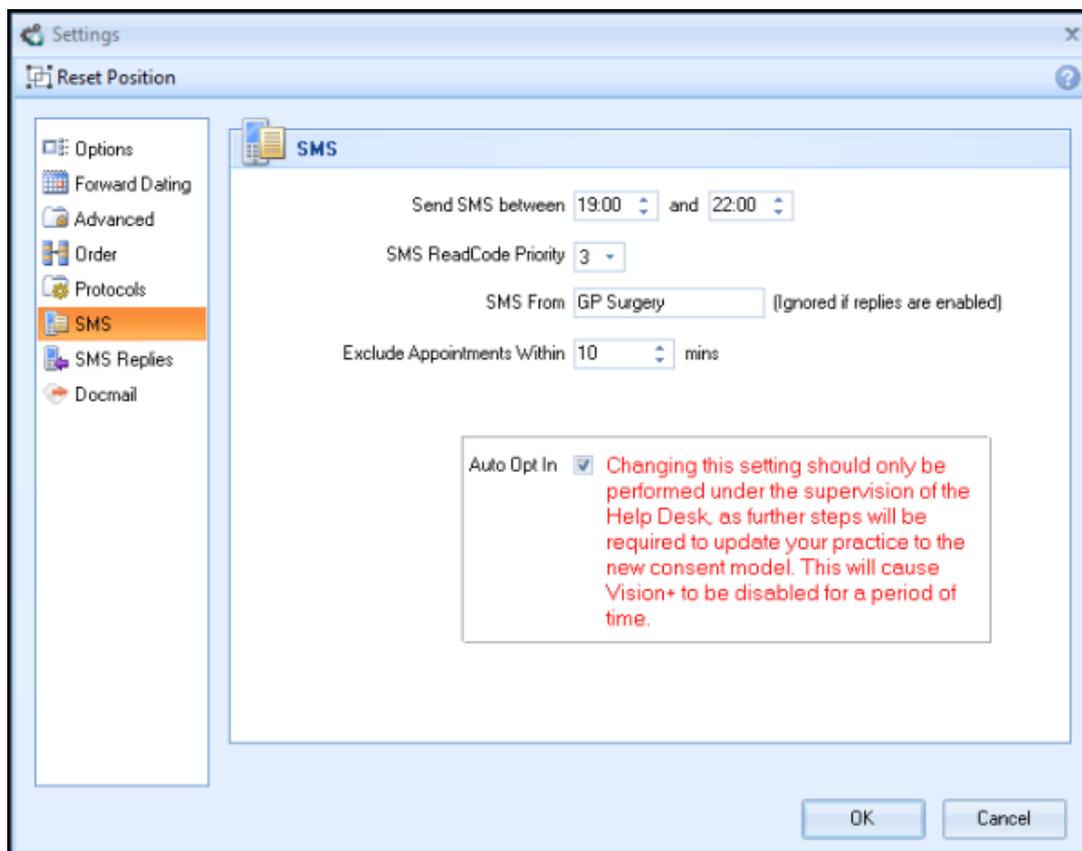




Important - This is a per user setting.

SMS Tab

The SMS tab is used to configure outgoing SMS messages.



3. Set the options as below:

- **Send SMS between** - You can send automated appointment text message reminders. The text reminders are sent between the practice defined transmission times entered here.
- **SMS Read Code Priority** - When an SMS message is sent to a patient for a recall (Clinical terms are not added for appointment text messages), the Clinical term **9N3G.00 SMS Text Message Sent To Patient** is recorded in the patient's journal. If required, change the SMS Clinical term priority default by selecting the priority number from the drop-down list. The default priority is 3.
- **SMS From** - When text messages are sent, the text in this box displays as the message sender on the patient's phone. We recommend that you enter **NHSNoReply** so that the patient knows where the SMS has come from. This also tells the patients they cannot reply to these automated SMS messages. You can, however, enter your practice name if required. Due to network constraints, there is an 11 character limit on this entry.
 - **Ignored if replies are enabled** - For text messages that require a response from the patient the **SMS From** details are ignored.

- **Exclude Appointments Within** - You can stop reminders being sent to appointments due within the time defined here.
 - **Auto Opt In** - Sets the SMS consent model to either **Auto Opt-In** or **Auto Opt-Out**. You must check that this complies with your practice consent policy as the default is to **Opt Patients In**.
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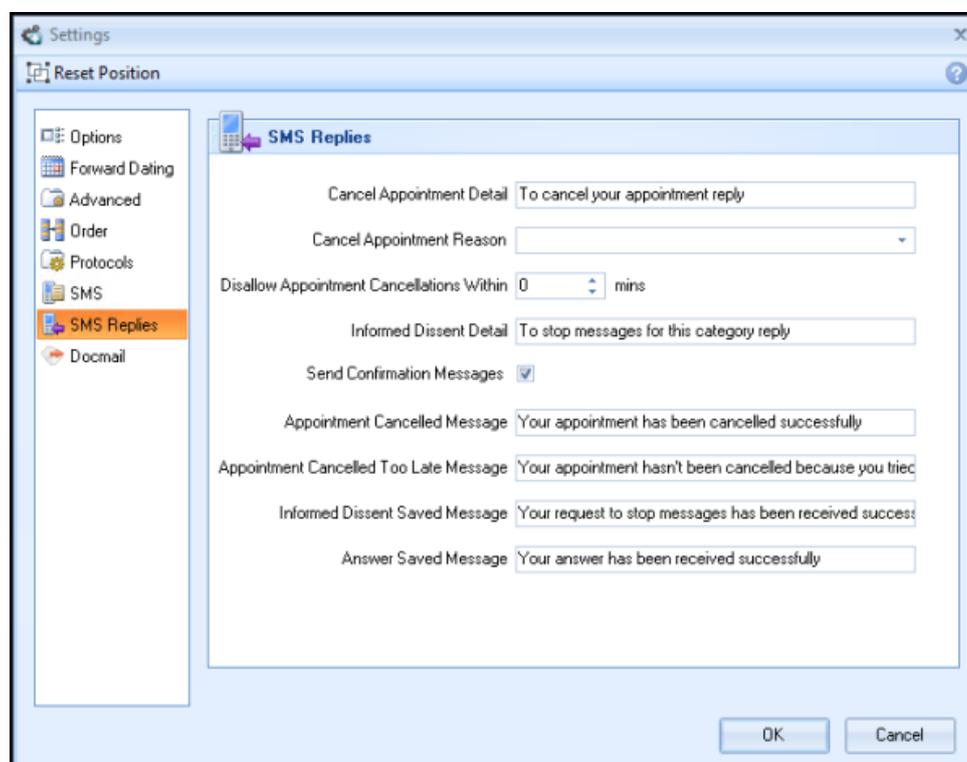


See [SMS Text Message Explicit Consent](#) for further details.

4. Select **OK** to save your practice-wide settings.

SMS Replies Tab

Practices licensed for SMS messaging in **Vision+** can configure incoming SMS messages from the **SMS Replies** tab.



1. Configure the following options in **SMS Replies**:

- **Cancel Appointment Detail** - Set the free text of the cancel appointment message that your patient receives, for example 'To cancel appointment reply 2' (the digit is a uniquely generated number, when your patient answers with said digit it links to the appointment and cancels it).
- **Cancel Appointment Reason** - Select a cancellation reason that populates the audit trail of the appointment when your patient cancels their appointment.



Training Tip - Consider creating a new cancellation reason in **Appointments**, see [Appointments Setup Cancellation Reasons](#) or [Appointments Cancellation Reasons](#) for more details depending on your setup.

- **Informed Dissent Detail** - A global message contained in SMS to patients offering the option to stop receiving invitation for call/recall. (The Informed Dissent merge field viewed in the template is replaced in the SMS to the patient by a response code unique to the patient. They start at 1 -9 then A etc).
- **Send Confirmation Messages** – Select this box to enable a confirmation message to be sent for all responses received for appointment cancellations, informed dissent and questionnaires.

- **Appointment Cancelled Message** - Create the free text confirmation message to a patient informing them their appointment has been cancelled successfully.
 - **Appointment Cancelled Too Late Message** - Sets the free text message to a patient when they have sent a cancel request out with the timeframe allowed by the practice.
 - **Informed Dissent Saved Message** - A global message contained in the SMS reply to patients confirming their response to stop invitation messages for call/recall invites has been received successfully.
 - **Answer Saved Message** - This is a global message contained in the SMS reply to patients confirming their response to an SMS question has been received successfully.
2. Select **OK** to save your practice wide settings.