



# SIS 10490 Vision Release Guide

Version 2

29/01/2020

Vision  
The Bread Factory  
1a Broughton Street  
London SW8 3QJ



Registered No: 1788577 England

[www.visionhealth.co.uk](http://www.visionhealth.co.uk)  
T +44(0) 20 7501 7000  
F +44(0) 20 7501 7100

**© 2019 In Practice Systems Limited**

All Rights Reserved.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of In Practice Systems Limited.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by In Practice Systems Limited, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

In Practice Systems Limited reserves, the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

**In Practice Systems Limited**  
**The Bread Factory**  
**1a Broughton Street**  
**London**  
**SW8 3QJ**

Website: [www.visionhealth.co.uk](http://www.visionhealth.co.uk)

---

# Contents

---

<b>SIS 10490 VISION RELEASE GUIDE</b>	<b>1</b>
<b>SIS 10490 VISION RELEASE GUIDE</b>	<b>1</b>
<b>Summary of Changes</b>	<b>1</b>
<b>QOF Exception Changes – England</b>	<b>4</b>
Vision+ Alerts	4
Viewing Exception Indicators	6
<b>Vision+ Calculators</b>	<b>8</b>
eGFR Calculator	8
<b>Vision+ Reports</b>	<b>9</b>
Exporting CSV files	9
<b>Vision+ Mail Merge</b>	<b>10</b>
QOF Merge All Invite Status	10
Vision+ Mail Merge Patient Count	12
QOF Merge Fields	13
QOF Patient Record	17
Pseudonymised NHS Number	18
Inserting Pseudonymised NHS no merge field	18
Selecting patients by the Pseudonymised number	20
Mail Merge Filter	21
<b>Anticoagulation Manager</b>	<b>22</b>
Warfarin Printout	22



# SIS 10490 Vision Release Guide





---

## Summary of Changes

29/01/2020


SIS 10490 delivers the following Vision+ changes:

### QOF

-  **Clinical Audit** - Clinical Audit is updated to Version 42 QOF Business rules for practices in England. Practices in Northern Ireland and Wales are updated to QOF Version 37.
-  **Vision+** - Vision+ Reports and Templates are also updated to QOF Version 42 for practices in England and Version 37 for practices in Northern Ireland and Wales.
-  **QOF Vision+ Template colour coding** – Rows in green indicate that QOF data is complete. Rows in black require data to be recorded before QOF year end. Rows in purple indicate no data recorded but it is not relevant for this patient, for example, the electronic frailty index status for a diabetic patient.
-  **Exception Coding** – Vision+ Exception coding and reporting for practices in England has changed and now includes the new Exception Business rules. See [QOF Exception Coding – England](#).

### Vision+ SNOMED CT

#### SNOMED CT


-  **SNOMED CT** – The SNOMED CT June 2019 dictionary is implemented for practices in England.




**Note** – Practices in Northern Ireland, Scotland and Wales continue to record data using Read terms in Vision+, however, in the background the entry is mapped to a SNOMED CT term. The switchover to recording SNOMED CT terms directly into Vision+ is planned for a future release.

---


### Vision+ Calculators

-  **eGFR Calculator** – The eGFR calculator allows for the adjustment for ideal weight to Cockcroft-Gault. It also calculates CCR from


Cockcroft-Gault and files this to the patient record. See [Vision Calculators](#).

-  **eGFR label**- The eGFR Cockcroft-Gault screen previously displayed an incorrect label of CR-CL (creatinine clearance). It now shows the correct label of eGFR.








### Vision+ Settings

-  **Exception Reporting** – Due to the changes in exception reporting for practices in England, the option to switch on separate Exception searches is removed from Vision+ Settings. The reasoning behind this is that exceptions are no longer reported separately and are part of the main indicators/denominator reports.

### Vision+ Reports

-  **Export Reports to a csv file** – Previously, exporting a patient QOF list to a CSV file only displayed the denominator category. The export now also includes indicator data. See [Exporting CSV files](#).

### Vision+ Mail Merge

-  **QOF 'Merge All' Invite Status** – When running the Merge All category option within mail merge, the invite displays with a date and status for each clinical category. See [Merge All Invite Status](#).
-  **QOF Merge Fields** – Previously, when sending a letter invitation to a patient that included QOF areas, the letter listed all the registers the patient was on, not just those you were inviting the patient in for. From SIS 10490 only the QOF areas selected are merged into the letter. See [QOF Merge Fields](#).
-  **QOF Patient Record** – Now when performing a mail merge on multiple QOF areas, using the filter option dictates what invite terms are written back to the patient record. See [QOF Patient Record](#).
-  **Non QOF Categories** – Non-QOF category mail merge options are removed from the mail merge fields.
-  **QOF Categories with No indicators** – Some QOF areas do not contain any indicators within them. For example, Osteoporosis and Epilepsy. Selecting merge category from Vision+ Practice Reports displays the warning message *"There are no invite status defined in the QOF Business rules for the Osteoporosis category"*.
-  **Pseudonymised NHS Number Mail Merge Template** - Mail merge templates can now include a pseudonymised (encrypted) NHS number. The pseudonymised option was developed for practices who have patients participating in studies/trials. In conjunction with this is a new pseudonymised patient search. See [Selecting patients by the Pseudonymised number](#).
-  **Mail Merge Filter** – Previously, after applying a filter using the All Merge categories you could only sort one column at a time. From SIS 10490 you can sort multiple columns. See [Mail Merge Filter](#)

## Vision+ Contract Manager








**Contract Manager** – For practices in Northern Ireland, Scotland and Wales, the option to schedule Contract Manager reports to run are removed from Configuration and Settings in Vision+. Contract Manager now automatically runs overnight and will be up to date as of the day before. You can still select update if you want to run the reports during the day, especially if it is getting near to QOF year-end.






**Contract Manager** – Some practices experienced error messages when running Contract Manager. This is resolved in SIS 10490.

## Anticoagulation Manager

-  **Anticoagulation Manager Patient Printout** - The printout given to a patient is enhanced to include extra information and can be customised. See [Anticoagulation Manager](#)
-  **Anticoagulation Manager A4 Patient Review** – Previously, you could only preview the anticoagulation manager printout for a patient on prescription paper. There is now an option to print preview as an A4 report. See [Anticoagulation Manager](#)
-  **Time in Therapeutic Range Calculator (TTR)** - The default TTR now looks at the last 12 months only. If the TTR is less than 12 months plus 6 weeks, the calculator ignores the first six weeks of results after Warfarin indication and then sets the start date to the first INR after that date.
-  **Mail Merge** – Performing a mail merge in Anticoagulation Manager did not always display the Word document. This is resolved in SIS 10490.
-  – **Warfarin Audit** – Previously the Warfarin audit report was displaying zero figures when searching on SNOMED CT terms. This is fixed in SIS 10490.

## Outcomes Manager

-  **Extract Patient Demographic data** – Patient demographic data as well as aggregated data is now extracted in Outcomes Manager.
-  **Rule Designer** – Rule Designer within Outcomes Manager (the tool used by Vision authors to create templates), now allows a default value to be set against a SNOMED/Read term within a template.
-  **Repeat Count** – Rule Designer allows for a repeat count.

## QOF Exception Changes – England

Exception coding and reporting for practices in England has changed. You can now remove patients from a QOF denominator/indicator based on the following five reasons:

- Unsuitability e.g. medicine intolerance or contra-indicated polypharmacy
- Patient choice e.g. after shared decision making
- Did not respond to offers of care
- Specific service is not available
- Newly diagnosed or newly registered patients (as per existing rules)

For more QOF information please refer to the NHS England QOF website - <https://www.england.nhs.uk/wp-content/uploads/2019/05/gms-contract-qof-guidance-april-2019.pdf>

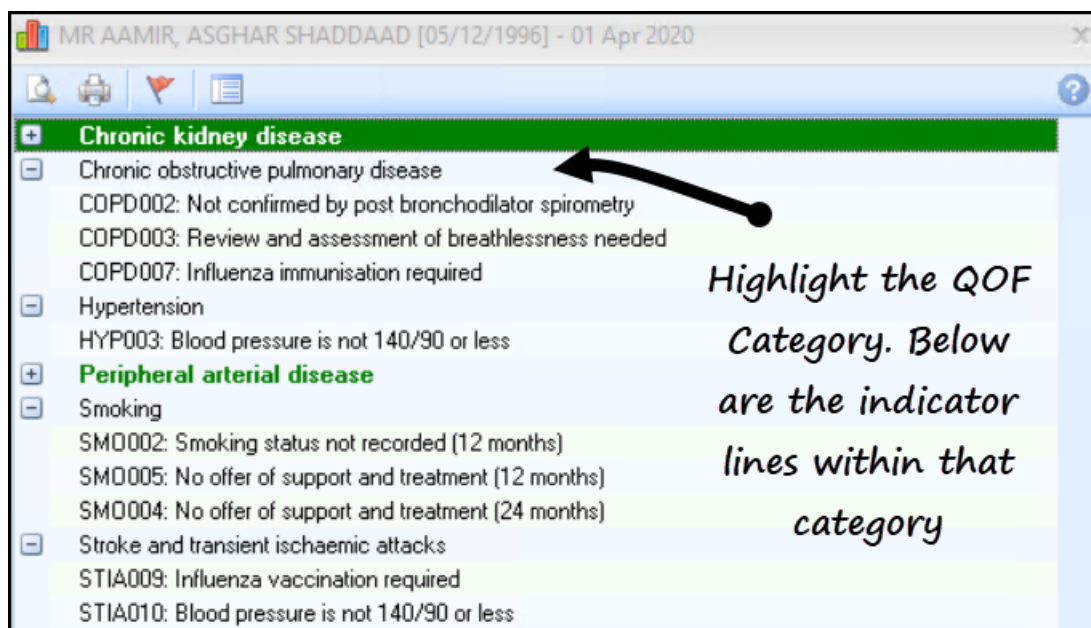
## Vision+ Alerts

From the Vision+ alert screen you can record the invite status for each QOF area. After two invites (as per the new rules) the patient is automatically excepted


**Note** – This also applies if inviting patients from Vision+ Practice Reports.

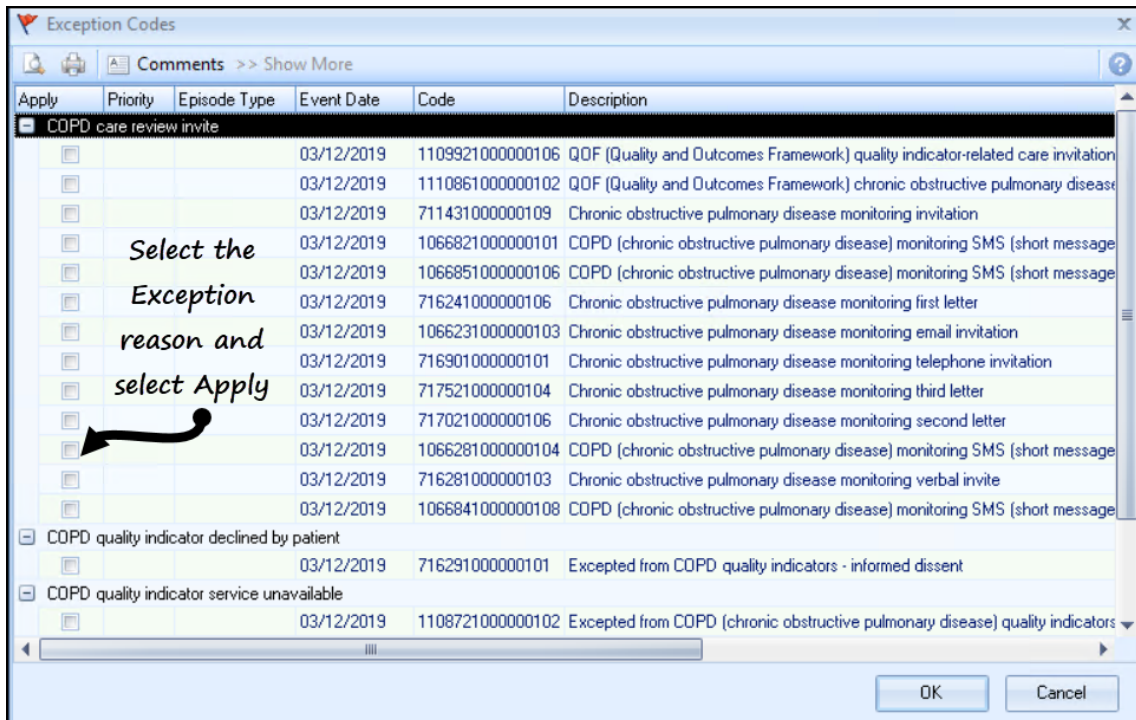
To record the invite status from the Alert screen and automatically exception code the patient:

1. From **Consultation Manager**, open a patient.
2. The **Alert** screen displays:
3. Highlight the QOF denominator eg Chronic obstructive pulmonary disease:





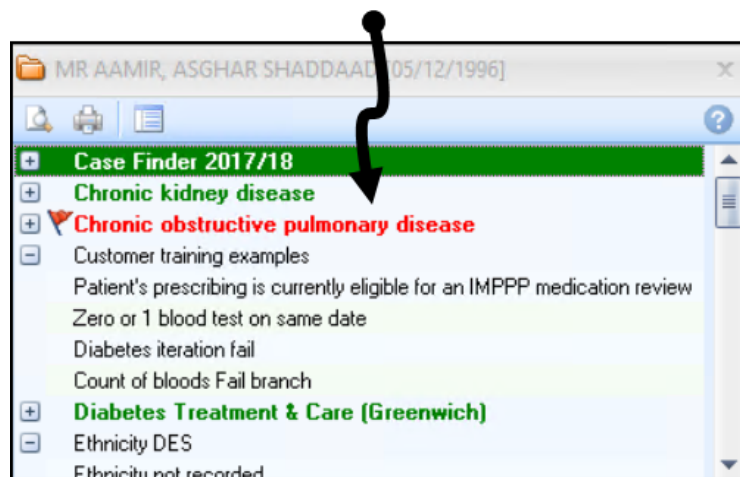
4. Select **Exception**  from the toolbar (or right click on the line and choose Exception).
5. A list of Exception reasons displays which include the invite status:



Apply	Priority	Episode Type	Event Date	Code	Description
<input type="checkbox"/>			03/12/2019	1109921000000106	QOF (Quality and Outcomes Framework) quality indicator-related care invitation
<input type="checkbox"/>			03/12/2019	1110861000000102	QOF (Quality and Outcomes Framework) chronic obstructive pulmonary disease
<input type="checkbox"/>			03/12/2019	711431000000109	Chronic obstructive pulmonary disease monitoring invitation
<input type="checkbox"/>			03/12/2019	1066821000000101	COPD (chronic obstructive pulmonary disease) monitoring SMS (short message
<input type="checkbox"/>			03/12/2019	1066851000000106	COPD (chronic obstructive pulmonary disease) monitoring SMS (short message
<input type="checkbox"/>			03/12/2019	716241000000106	Chronic obstructive pulmonary disease monitoring first letter
<input type="checkbox"/>			03/12/2019	1066231000000103	Chronic obstructive pulmonary disease monitoring email invitation
<input type="checkbox"/>			03/12/2019	716901000000101	Chronic obstructive pulmonary disease monitoring telephone invitation
<input type="checkbox"/>			03/12/2019	717521000000104	Chronic obstructive pulmonary disease monitoring third letter
<input type="checkbox"/>			03/12/2019	717021000000106	Chronic obstructive pulmonary disease monitoring second letter
<input type="checkbox"/>			03/12/2019	1066281000000104	COPD (chronic obstructive pulmonary disease) monitoring SMS (short message
<input type="checkbox"/>			03/12/2019	716281000000103	Chronic obstructive pulmonary disease monitoring verbal invite
<input type="checkbox"/>			03/12/2019	1066841000000108	COPD (chronic obstructive pulmonary disease) monitoring SMS (short message
<input type="checkbox"/>					
<input type="checkbox"/>			03/12/2019	716291000000101	Excepted from COPD quality indicators - informed dissent
<input type="checkbox"/>			03/12/2019	1108721000000102	Excepted from COPD (chronic obstructive pulmonary disease) quality indicators

6. Select **Apply** alongside the Exception status and select **OK** to save the changes.
7. Recording two or more invite status automatically exception codes the patient and the category heading displays in red to indicate the patient is excepted. The indicator lines below the category are also removed:

*The OOF Denominator displays in red and the indicators are removed*



MR AAMIR, ASGHAR SHADDAAD [05/12/1996]

- Case Finder 2017/18
  - Chronic kidney disease
  - Chronic obstructive pulmonary disease
  - Customer training examples
    - Patient's prescribing is currently eligible for an IMPPP medication review
    - Zero or 1 blood test on same date
    - Diabetes iteration fail
    - Count of bloods Fail branch
  - Diabetes Treatment & Care (Greenwich)
  - Ethnicity DES
    - Ethnicity not recorded

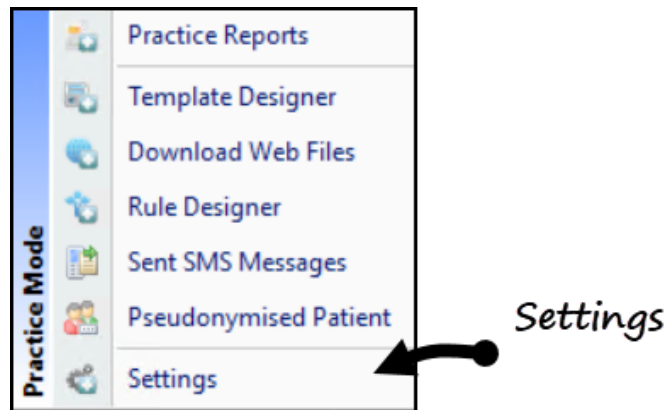
## Viewing Exception Indicators

In some instances, you may exception code a patient but now see the patient and complete a QOF indicator. For example, you can exception code a patient from the COPD register but have since administered the influenza vaccination.

To view Exception codes for QOF areas that are now excepted:

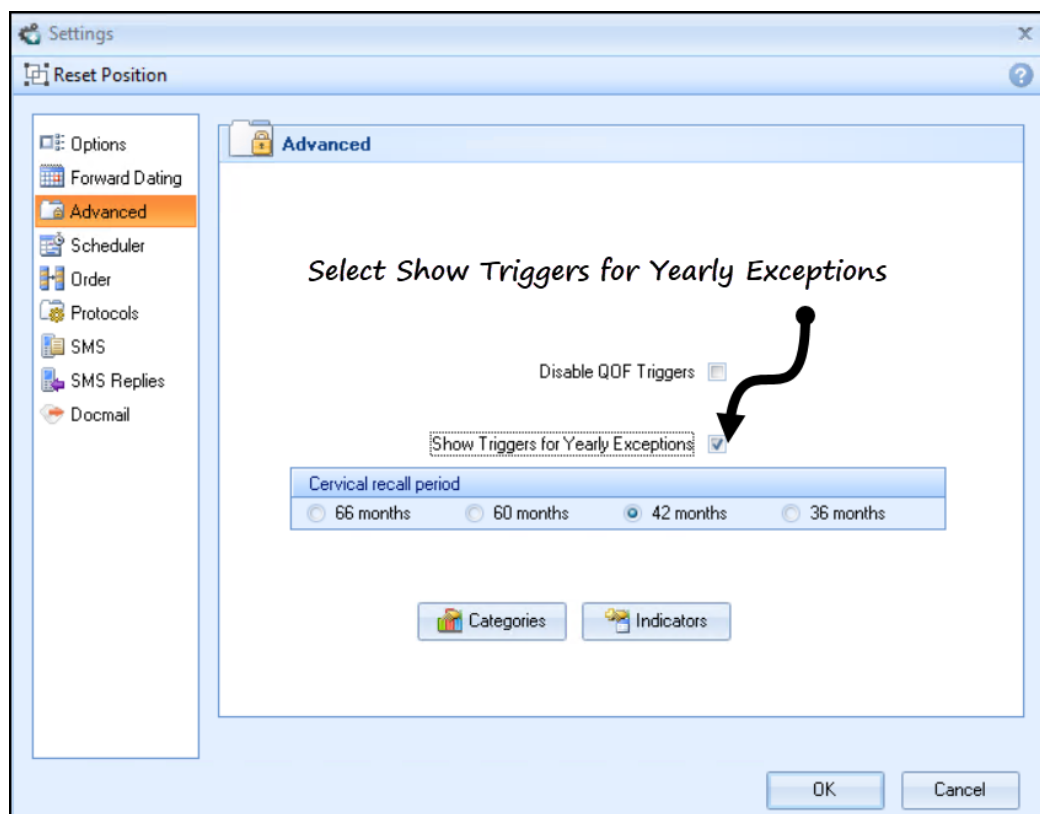
From the Windows Notification area, right click and select **Vision+**

1. Select **Settings**:

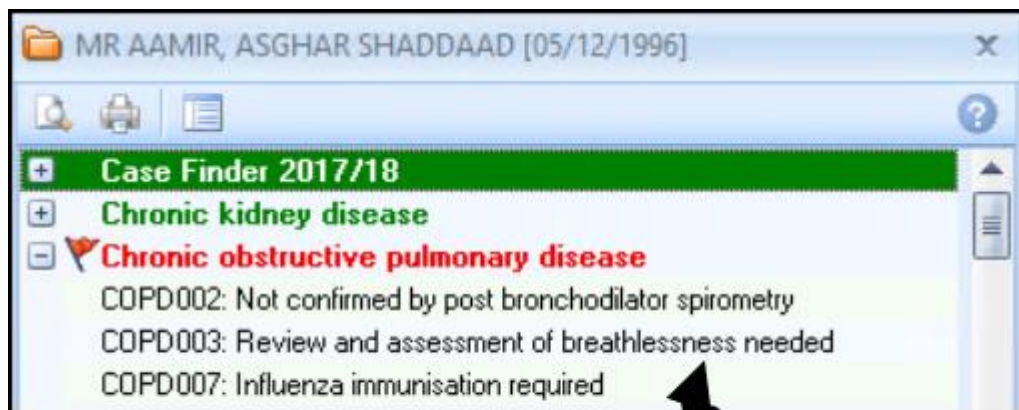


2. From **Settings** select **Advanced**:
3. Select **Show Triggers for Yearly Exceptions** and select **OK**.

**Note** – This is a practice wide setting.



4. The QOF indicators now display below the red QOF (excepted) denominator:



*QOF Indicators now display*

## Vision+ Calculators

The eGFR calculator incorporates the patient's adjusted ideal body weight and displays the appropriate eGFR terms

### eGFR Calculator

To select the eGFR Calculator:

1. Open a patient in Consultation Manager.
2. From the **Vision+ Floating Toolbar** select **Calculators**.
3. Select **Other**.
4. Select **eGFR** calculator.
5. Patient data displays in the calculator.

*Ideal Weight displays if Cockcroft and Gault - Ideal weight is selected*

*Cockcroft and Gault - Ideal Weight*

*The relevant eGFR codes display and are recorded*

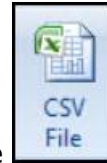
*CKD terms display and can be entered*

6. Change the relevant criteria, for example, select **Cockcroft and Gault - Ideal Weight** to view the patient's ideal weight.
7. To save the score select **OK** or **OK & Attach** (which also saves the calculator screen as an attachment).

## Vision+ Reports

SIS 10490 introduces the following changes to Vision+ Reports:

### Exporting CSV files



Previously, when expanding QOF lists and exporting to a CSV file it only displayed the denominator category. The export now also includes indicator lines.

B4		X	✓	fx	COPD002: Not confirmed by post bronchodilator
	A	B			
1	Category	Description			
2	Chronic obstructive pulmonary disea	COPD002: Not confirmed by post bronchodilator sp			
3	Chronic obstructive pulmonary disea	COPD002: Not confirmed by post bronchodilator sp			
4	Chronic obstructive pulmonary disea	COPD002: Not confirmed by post bronchodilator sp			

*The export file shows the Indicator data in the  
Description column*

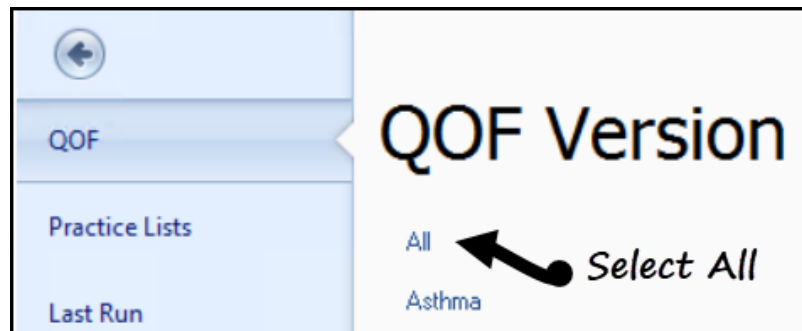
## Vision+ Mail Merge

The following mail merge changes are introduced in SIS 10490:

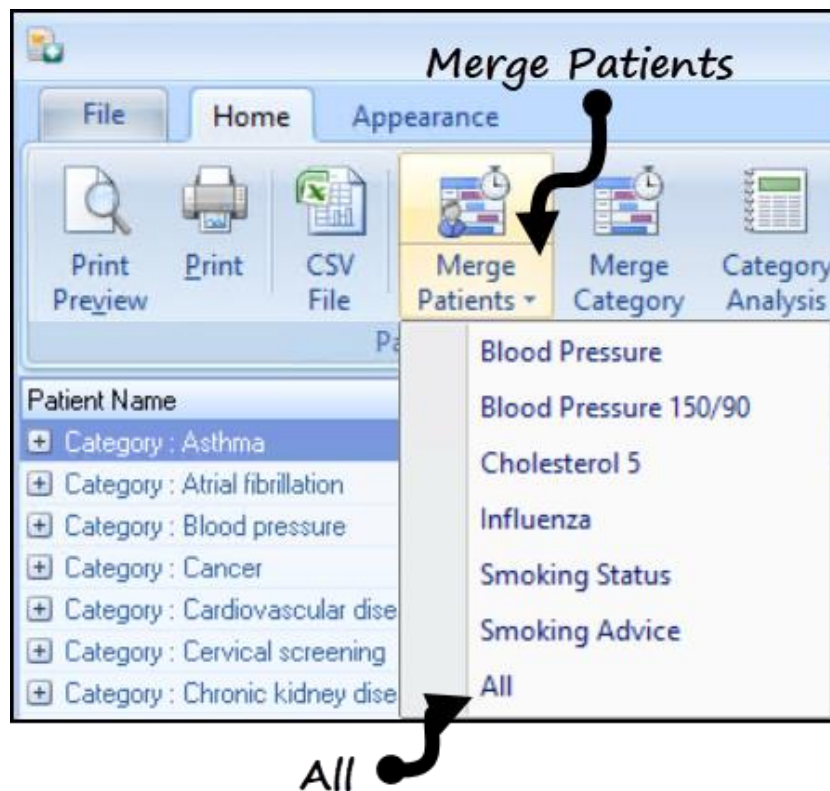
### QOF Merge All Invite Status

When running the **Merge All** category option within mail merge, the invite displays a date and status for each clinical category.

1. From **Vision+ Practice Reports**, select **All**.



2. Select **Merge Patients** and choose **All**.



All Patients			
Mailings SMS SMS Questions Calculator Bulk Insert Appearance			
<div> <div>Open Patient</div> <div>Select All</div> <div>Random Select</div> <div>Filter</div> </div>		<div>Please select a letter template:-</div> <div> <div></div> <div>Docmail</div> <div>Mail</div> <div>Preview Letter</div> <div>Preview</div> </div>	
Action		Start Mail Merge	
Mail	Patient	DOB	All Invite Dates
<input type="checkbox"/>	AAMIR, ASGHAR SHADDAAD	05/12/1996	Chronic obstructive pulmonary disease 1st invite performed 03/12/20 Hypertension 1st invite required Smoking 1st invite required Stroke and transient ischaemic attacks 1st invite required
<input type="checkbox"/>	AAMIR, JALIL	30/07/2000	Atrial fibrillation 1st invite required Smoking 1st invite required Stroke and transient ischaemic attacks 1st invite required

*Each invite status displays alongside the category and where an invite is sent a date displays*

3. The patient's details display and show the following:

- QOF area
- Invite status
- Date invite performed

## Vision+ Mail Merge Patient Count

The mail merge screen in Vision+ Reports displays a patient count for each list (including co-morbidity lists using the Merge All option) and a total of how many patients are selected.

The co-morbidity list displays:

<input type="checkbox"/> Mail	Patient	DOB
<input type="checkbox"/>	AAMIR, ASGHAR SHADDAAD	05/12/1996
<input checked="" type="checkbox"/>	AAMIR, JALIL	30/07/2002
<input checked="" type="checkbox"/>	AAMIR, NASEEM RAMALAN	21/04/1939
<input type="checkbox"/>	AARON, ABICHAIL	26/08/1954
<input type="checkbox"/>	AARON, ATALIA	02/08/1962
<input type="checkbox"/>	AARON, BECKA HANNAH	03/04/1930
<input type="checkbox"/>	AARON, DERORIT NECHAMA	25/04/1983
<input type="checkbox"/>	AARON, DEVORIT MENACHEMA	06/12/1974
<input type="checkbox"/>	AARON, DIZA ATERET	03/12/1965
7649	Selected Count=2	

*Co-morbidity totals and number of patient's selected*

Individual merge categories display a total for that category and the number of patients selected:

<input type="checkbox"/>	ABDULLA, FAYYAAD NAAIF	17/01/1975	1st invite required
<input type="checkbox"/>	ABDULLA, MU'HSINA MARTHA	10/08/1968	1st invite required
<input type="checkbox"/>	ABDULLA, NAZIRAH THAABITA	09/08/1985	1st invite required
<input type="checkbox"/>	ABDULLAH, NIMAH FAT'HIYAA	10/08/1959	1st invite required
1462	Selected Count=2		

*There is a count of patients with hypertension and the number of patients selected*

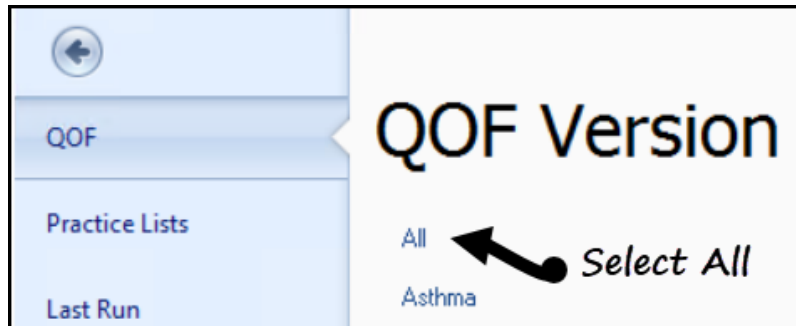


## QOF Merge Fields

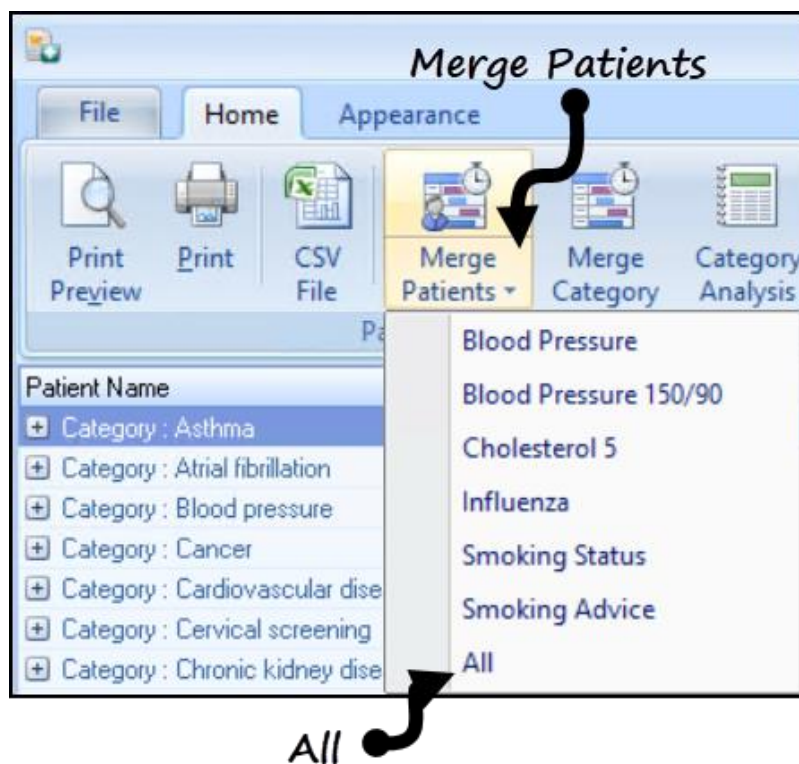
Mail merge letter invites can be filtered to only include the QOF area you are inviting the patient in for. To do this:

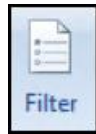
**Reminder** – To merge QOF areas the letter template must include QOF category/indicator merge fields – see [Letter templates](#).

1. From **Vision+ Practice Reports**, select **All**.

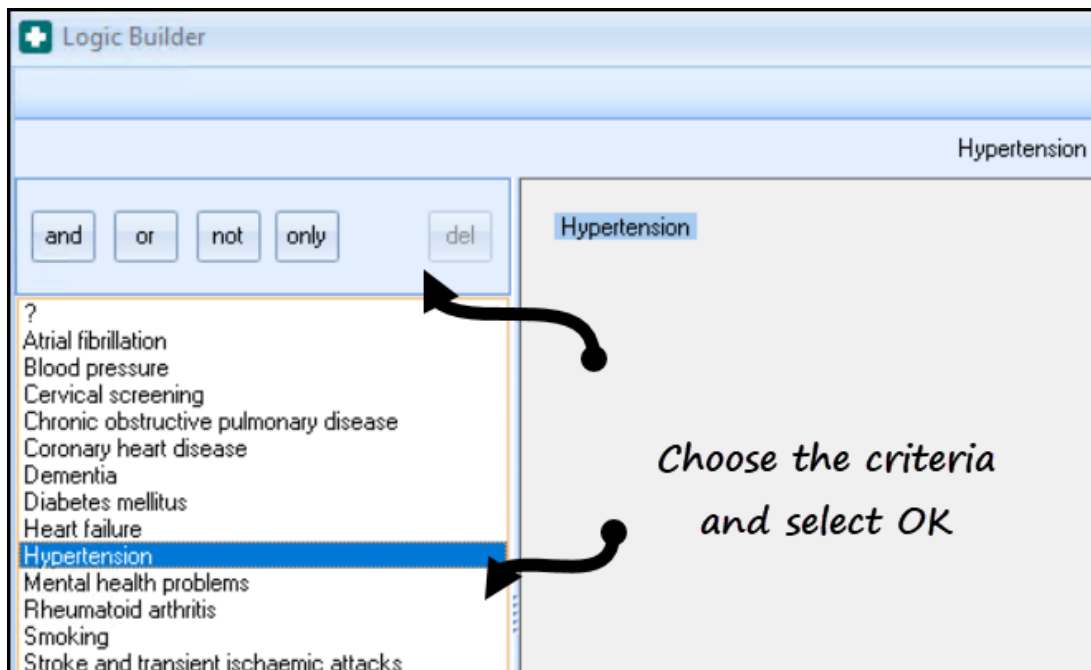


2. Select **Merge Patients** and choose **All**.





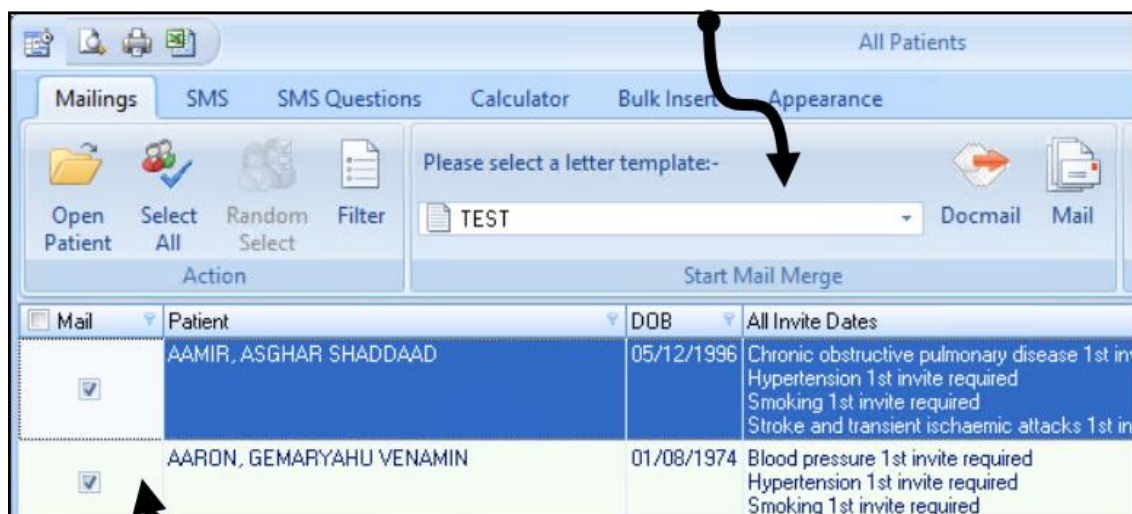
3. Select **Filter**.
4. From the **Logic Builder** screen choose the QOF category and criteria and select **OK**:



**Note** – For more information on filters – See [Vision+ Reports](#).

5. Select the patient(s) and the letter template:

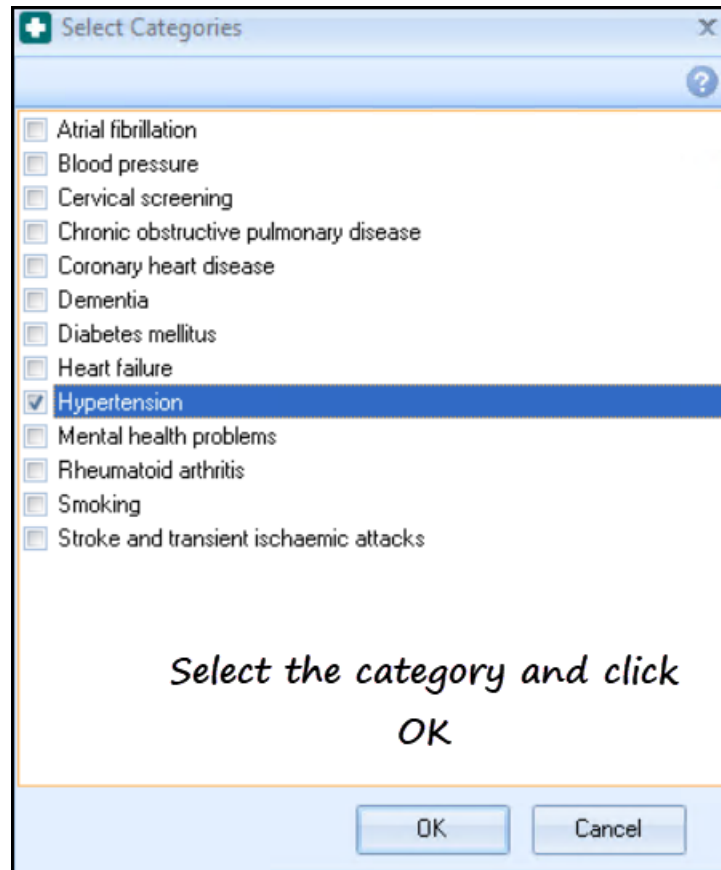
*Select the letter template*



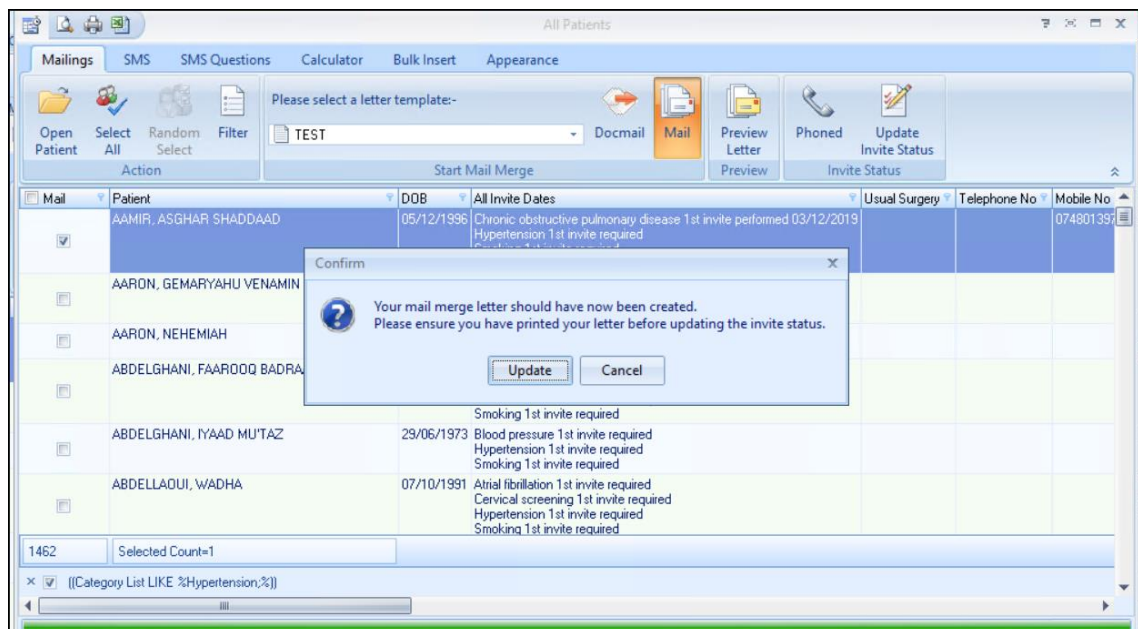
*Select the patient(s)*



6. Select **Mail**.
7. Choose the categories to be merged and select **OK**.



8. Merge letters generate and display the category selected.



## The Surgery

09 Dec 2019

Mr Aamir

10 Eridge Road

Guisborough

Cleveland

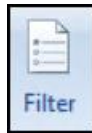
TS14 7BJ

*Hypertension is  
the only  
category  
displayed in the  
letter*



Example merge fields: Hypertension|

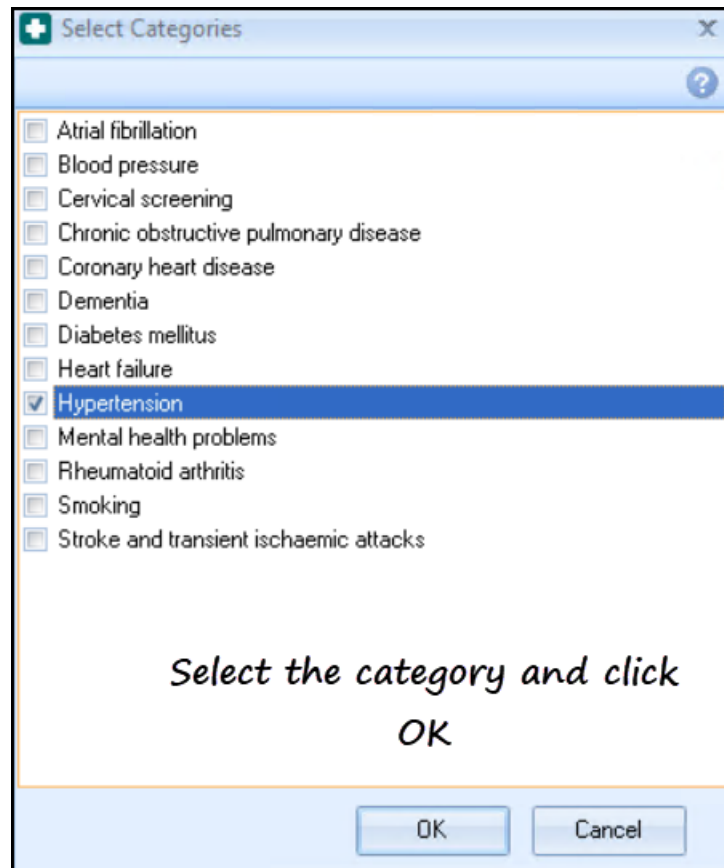
## QOF Patient Record

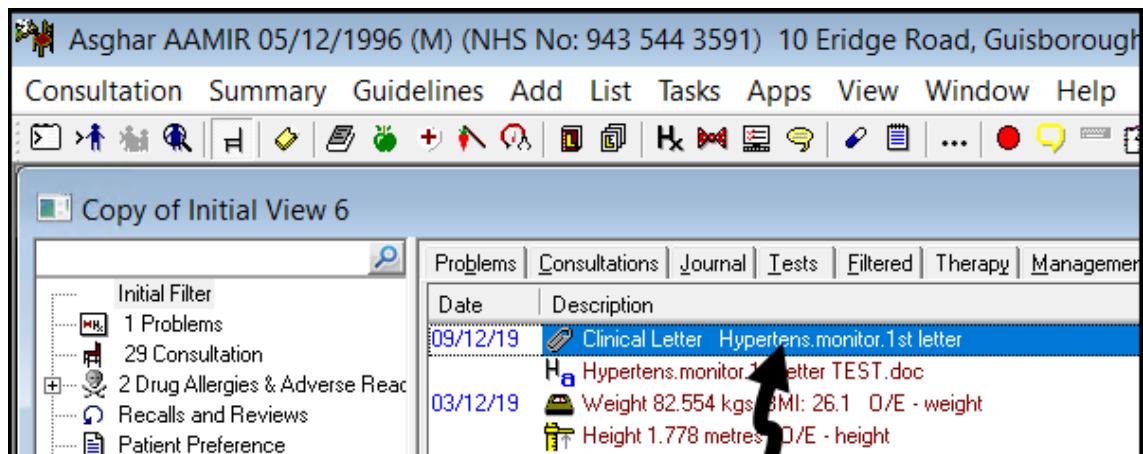


Like the above, selecting **Filter** in **Vision+ Reports** and choosing **Mail**



allows you to select a category. Whatever category you choose dictates what invite terms are recorded in the patient record:



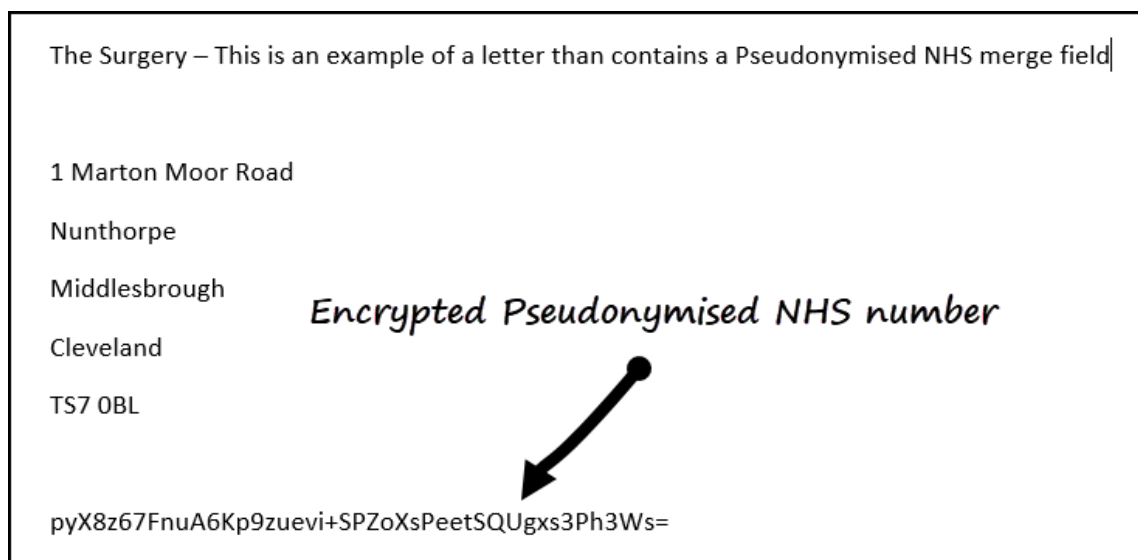


*Hypertension invite recorded in the patient's record*

## Pseudonymised NHS Number





At the request of practices who have patient's participating in studies and trials, a new pseudonymised NHS number merge field is available. This inserts a forty-two-digit encrypted NHS number into any correspondence sent to or regarding the patient.

Below is an example of how the NHS number displays in the letter once encrypted:



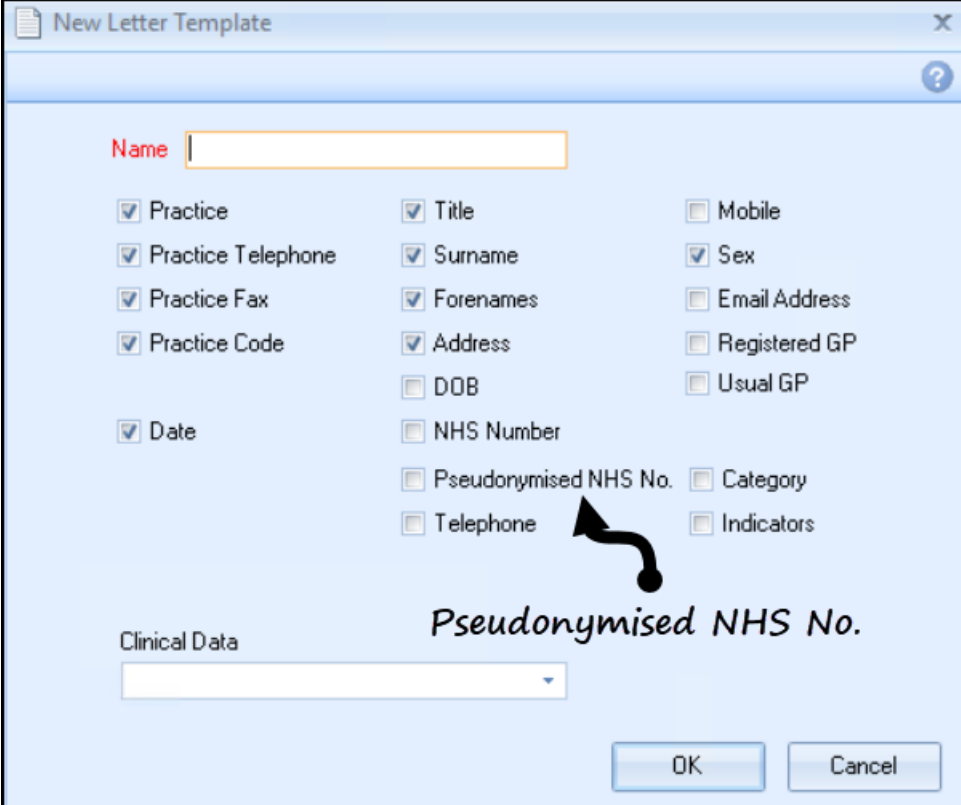
## Inserting Pseudonymised NHS no merge field

From **Vision+ Practice Reports**, select **Merge Templates**:

 <b>Contract Manager</b>	Using Contract Manager you can view your point's totals, track aspirations, plan monthly workloads, compare year-on-year performance, show your practice prevalence and provide you with financial information.	 <b>High Value Patients</b>	High Value Patients are a list of the top 25 patients with outstanding indicators that have a corresponding high points/financial value.
 <b>Merge Templates</b>	Create, edit and delete mail/SMS merge templates.	 <b>SMS Question Templates</b>	Create, edit and delete SMS question templates.

*Merge Templates*

If creating a new letter, select Pseudonymised NHS number from the list of merge fields:



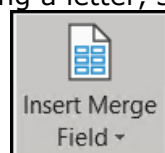
The 'New Letter Template' dialog box contains a 'Name' field and a list of merge fields. The fields are arranged in three columns:

- ☒ Practice
- ☒ Practice Telephone
- ☒ Practice Fax
- ☒ Practice Code
- ☒ Date
- ☒ Title
- ☒ Surname
- ☒ Forenames
- ☒ Address
- ☐ DOB
- ☐ NHS Number
- ☐ Pseudonymised NHS No.
- ☐ Telephone
- ☐ Mobile
- ☒ Sex
- ☐ Email Address
- ☐ Registered GP
- ☐ Usual GP
- ☐ Category
- ☐ Indicators

At the bottom, there is a 'Clinical Data' dropdown menu and 'OK' and 'Cancel' buttons. An arrow points to the 'Pseudonymised NHS No.' checkbox with the label *Pseudonymised NHS No.*

Alternatively, if editing a letter, select **Pseudonymised NHS number** from

**Insert Merge Field**

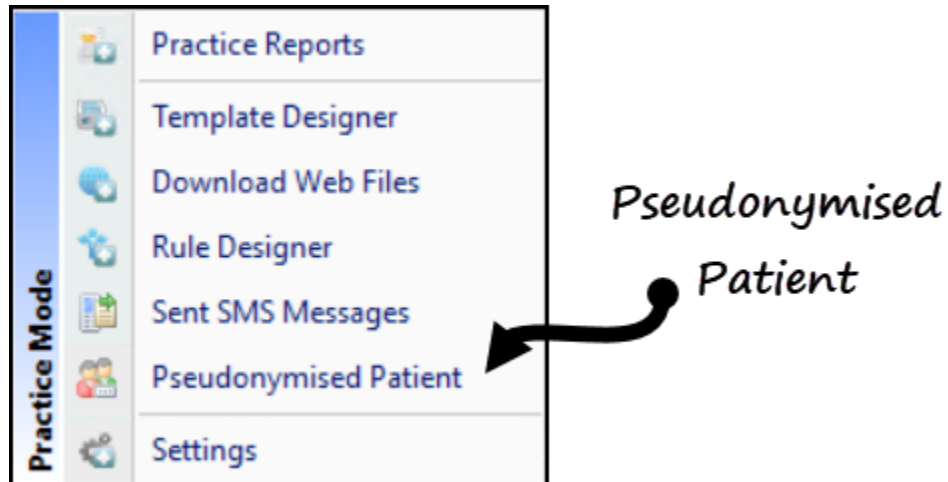


within the document.

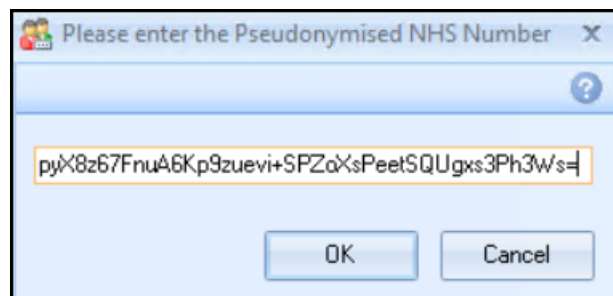
### ***Selecting patients by the Pseudonymised number***

There is now an option to select patient by pseudonymised number. To do this:

1. Make a note of the pseudonymised number (copy it).
2. Right click on **Vision+** in the Windows Notification area.
3. Select Pseudonymised patient.



4. Enter or paste the encrypted number:

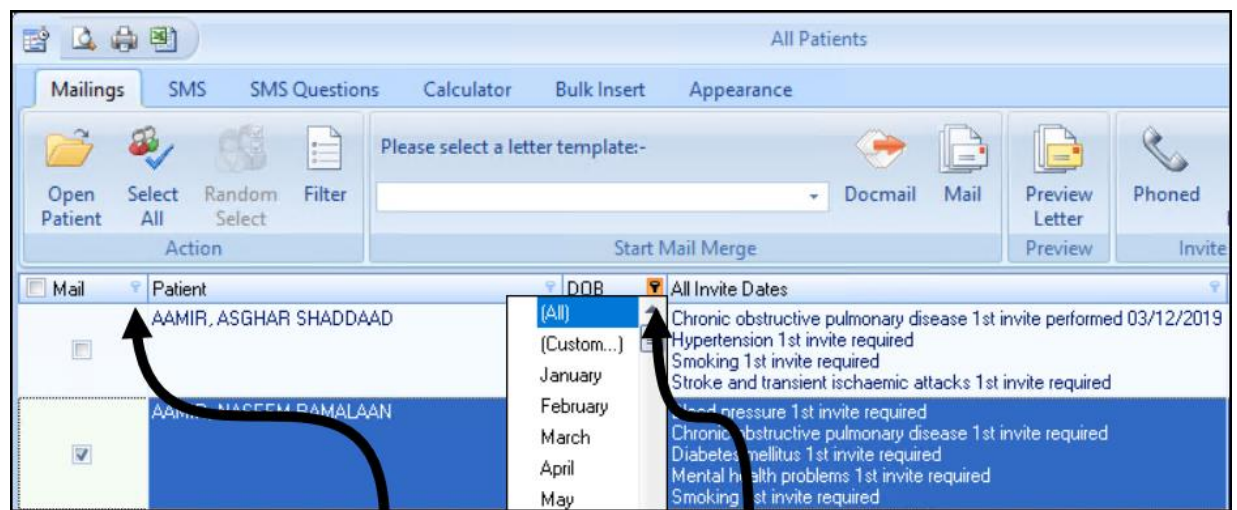


5. The patient record opens in Consultation Manager and can be reviewed as normal.



## Mail Merge Filter

Previously, after applying a filter using the All Merge categories you could only sort one column now you can sort multiple columns:



*Multiple columns can be sorted*

# Anticoagulation Manager

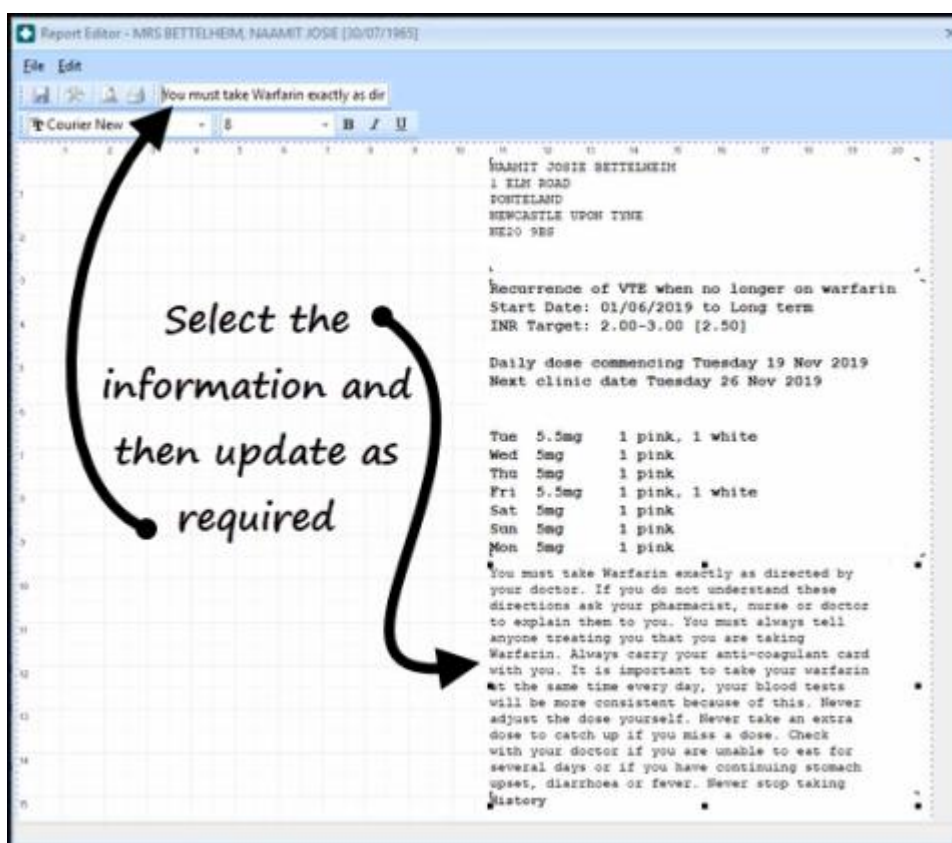
The following Anticoagulation Manager changes are included in SIS 10490:

## Warfarin Printout


The Warfarin print out given to a patient is enhanced to include additional information, the printed text is also customisable.

To view and customise the printout:

1. From the Vision+ floating toolbar, select **Warfarin Monitor**:
2. From the **Warfarin Dose** screen, there are now two print preview options:
  - **Print Preview** – to display the prescription printout
  - **Preview A4 Report** – to display the A4 report printout
3. The report displays with the following additional information:
  - Start date
  - End date
  - Indication
  - INR Target
4. To update the warning/information, highlight the relevant section on the printout and use the toolbar to alter the font and text.



**Note** – The wording in "greyed out" areas of the printout cannot be changed. However, the format of the text can be altered for example, font size increased, underlined etc.

5. Text on the A4 report preview can be moved to a different position by dragging and dropping the information.
6. Select **Save**  to keep the changes.