

# Patient Online Services Prescription

# **User Guide - All Countries**

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Registered name: Cegedim Rx Ltd. Registered number: 02855109 Registered name: In Practice Systems Limited. Registered number: 01788577 Registered address: Studio F5 Battersea Studios 1, 82 Silverthorne Road, London SW8 3HE

Website: <a href="https://www.cegedim-healthcare.co.uk/">https://www.cegedim-healthcare.co.uk/</a>



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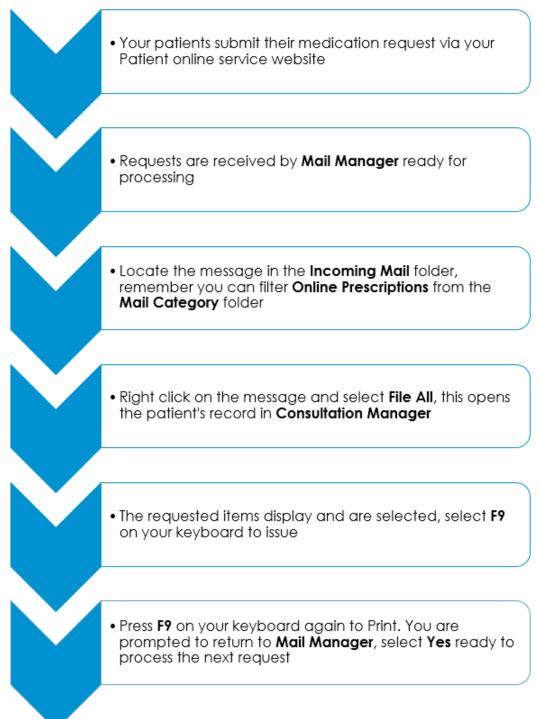


# Patient Online Services Prescription User Guide

### An Overview of Online Prescription Requests

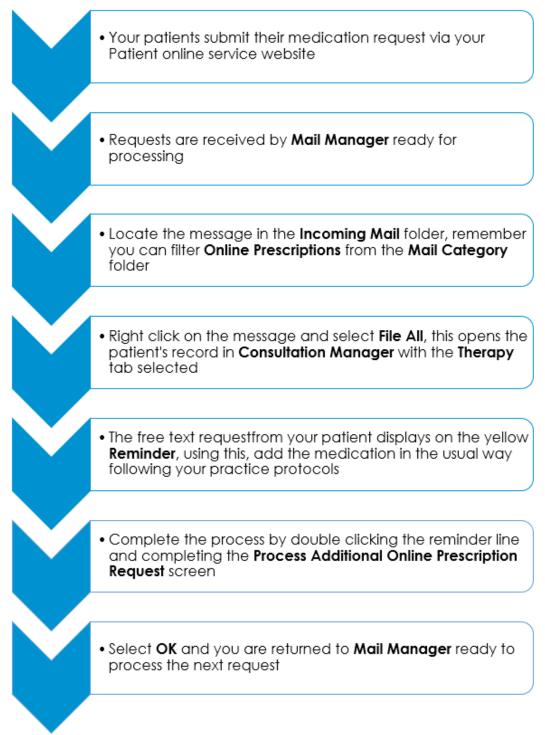
Online prescriptions enable your patients to request acute and repeat medication at their convenience. You are responsible for allowing patients access and you can disable online services for patients you feel are abusing the service, you can also customise how your patients use the service.

#### **Online Repeat Prescription Overview**





#### **Online Acute Prescription Overview**





## **Configuring Online Prescriptions**

**Note** - You must have System Administrator rights to enable and configure patient online services (England only – see <u>RBAC</u> <u>Help in the Spine Services Help Centre</u> for further details).

To enable online prescriptions:

- 1. From Vision 3 Management Tools, select Control Panel File Maintenance Online.
- 2. The Vision Online Services screen displays, tick Prescription:
  - **Repeat** to enable your patients to order repeat medications online.
  - Acute to enable your patients to request acute (one off) medications:

	Vision Online Services
Tick to allow repeat medication to be ordered online	Global          Image: Configure C
	Repeat: 🗹 Enabled Configure
Tick to allow acute medication to be ordered online	<ul> <li>Acute:          ✓ Enabled     </li> <li>Patient Messaging:          ✓ Enabled     </li> <li>Summary Data:          ✓ Enabled     </li> <li>Detailed Coded Record:          ✓ Enabled     </li> </ul>
	Demographics         ✓ View         ✓ Auto Update         Pharmacy Nomination         ✓ View         ✓ Update         ①K       Cancel         ①K

3. Now select **Configure** to customise how online prescriptions works for your practice.



## **Configuring Online Prescriptions for Patients**

You need to configure how your patients see prescriptions within your patient online services website. You should consider the following:

- From Control Panel Online:
  - Prescription Message on page 8
  - History on page 9
  - Patient Message on page 9
- And from **Consultation Manager**:
  - Define Old Repeat Offset on page 10

Once you have finished configuring each option, select **OK** to save and close.



#### **Prescription Message**

The prescription message displays within the **My Prescription** section of your patient online services website.

From **Control Panel - Online Services - Prescriptions Configuration**, enter your prescription message in the **Prescriptions Message** section of the **General** tab using either:

- The formatting editor provided, see Using the Message Editor on page 22.
- Or, HTML formatting tags, see Formatting HTML Messages on page 24:

Yision Online Services Prescriptions Configuration	×
Web Browser	
General	,
Prescriptions Message:	
Source     Arial     ▼     A^ ▲       B     Z     U     A     III       III     III     III     IIII	
Please allow 48 hours before collecting your	
Add your message here	
History Show request history up to 3 = months Patient Message Allow patients to submit a free-text message with their requests	
<u> </u>	i

**Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Prescription Welcome Message**: 'In the case of a query regarding a prescription please contact the surgery in the usual way'.

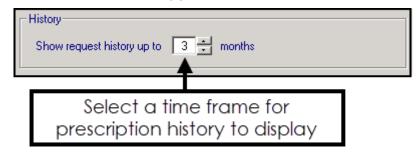


#### **History**

You can set a time frame for the patient repeat request history displayed:



From Control Panel - Online Services - Prescriptions
 Configuration - General - History use the arrows to select a from between 1 - 12 month(s):



#### Patient Message

You can allow your patients to contact you via their prescription request:



• From Control Panel Control Panel - Online Services - Prescriptions Configuration - General - Patient Message tick Allow patients to submit a free-text message with their requests:



Tick to allow patients to submit messages with their medication requests

**Note** - When this option is selected, a warning message displays, advising the practice to ensure that the necessary processes are in place to check any messages entered by the patient.



#### Define Old Repeat Offset

The **Old Repeat Offset** determines what repeat prescriptions can be ordered online.

To change the Old Repeat Offset:

1. From Management Tools - Control Panel - File Maintenance,



2. The Vision System Settings screen displays, select the Therapy tab:

Date Offset	Overdue Offset	DueOffset	Default Read Code	_	OK
5 months	1 year	2 weeks	8B3S.00-Medication review	•	Cancel
Date Offset Limit					Help
13 months				-	
Repeats					
Old Repeat Offset	Descention				
ond report Oneot	Repeat Limit				
3 months	50	_			
3 months	50				
3 months					
3 months	50				
3 months	50 on/Reactivation Reason				
3 months Carable Inactivation Out of Practice Dosage Warning Text	50 pn/Reactivation Reason	by GP or dispensed by	Community Pharmacy.		
3 months Carable Inactivation Out of Practice Dosage Warning Text	50 pn/Reactivation Reason	by GP or dispensed by	Community Pharmacy.		
3 months Carable Inactivation Out of Practice Dosage Warning Text	50 pn/Reactivation Reason	by GP or dispensed by	Community Pharmacy.		
3 months Carable Inactivation Out of Practice Dosage Warning Text	50 pn/Reactivation Reason	by GP or dispensed by	Community Pharmacy.		

- 3. In **Repeats Old Repeats Offset**, enter a time span, for example, if you select an offset date of '3m', patients can only order repeat prescriptions issued within the last 4 months. Repeats not issued within this time display on the **Unavailable** list.
- 4. Select **OK** to save and close.



### **Processing Online Repeat Prescription Requests**

Once your patient has requested a repeat prescription, via your patient online services website, requests can be viewed in **Mail Manager**. All prescription requests are listed in both the **Incoming Mail** and **Unallocated Mail** folder of **Mail Manager** they are not allocated to a specific staff member and can be viewed by all **Mail Manager** users. To process requests you must have permission in **Control Panel - Security** to issue and print a repeat master.

To fully process a prescription request:



- 1. From Mail Manager Mail Manager, select Incoming Mail Mail Categories Online Prescriptions.
- 2. Request messages initially display with an **Available for filing** status. Highlight the message you want to process and check the request details displaying in the bottom pane, if the patient has added a message you can view it from here:

⊕ ⇒ Back Forward Refresh Actions	Tick *	青 育 開 。 Staff Patient Fie	Read Print	4 Al	거 비 E Find Contige Vie	I 🖬	
Incoming Mail							
Patients No current Patient		Status	Туре	Read	Date 🗸	Staff	Pat
Staff Actions		📇 Available for filing	Online Prescription		24/05/2011 08:45	Mars, Jane	Adri
All dates, All Mail		a Available for filing	Online Prescription		24/05/2011 08:45	Venus, Fiona	Balı
		📇 Available for filing	Online Prescription		24/05/2011 08:45	Venus, Fiona	Bah
B-Call Incoming Mail		🚑 Available for filing	Online Prescription		24/05/2011 08:45	Venus, Fiona	Bah
And Categories		🚞 Filed	Online Prescription	-	20/05/2011 13:22	Venus, Fiona	Balm
E A Saturn, Carol		🖲 Available for filing	<b>Online Prescription</b>		20/05/2011 11:57	Venus, Fiona	Bah

**Note** - **Online Prescription** messages cannot be allocated to staff, actioned or copied. If you need to query the request with the GP, do so before processing the message. Messages can only be processed once, either fully or partially.

3. Highlight the message you want to process, right click and select File All.



4. A **Repeat Issue** consultation automatically starts for the patient in **Consultation Manager** and the **Therapy - Repeat** screen displays with the requested items selected:

Consultation Summary Quidelin	Add List Repeats View V	Mindow <u>H</u> elp					
🗹 >t 🐐 🎕 🗧 🧇 🖉	🔸 🍋 🔍 🖬 🗊 🔣	M 🤿 🖌 📋	• 🖵	⇒ ₩ 루			
<u>م</u>	ppgintments   Patient Select   Pa	atient Details Consultation	s Journal	Eiltered List Summary/Grid	Tests 🕨	Therapy Guide	ines
Initial Filter 4 Problems	Current Scripts Repeats	i 🖻 🖻 😿 🗙 🗸	- 🔁 🎒	∰ 新目18 » «	Add Medica	tion Review	
- d 33 Consultation	Last Issued Drug		lss Ma	и Dosage	Q Prep	paration	Authorised
- 🎘 Drug Allergies & Adverse Rea	Not Issued 🛛 🗎 CETIRIZINE (	abs 10mg	3	TAKE ONE DAILY	30 table	t 2	4/05/2011
Recalls and Reviews     Patient Preference	Not Issued 📋 CD-DYDRAM	OL tabs 10mg+500mg	3	TAKE 1 OR 2 FOUR TIMES DAILY	100 table	t 2	4/05/2011
Hx 9 Medical History     Hx 9 Medical History	Not Issued VENTOLIN E 100microgram	VOHALER clc free inh s/inhalation	3	INHALE 2 DOSES AS NEEDED	200 dose	) 1	4/05/2011
🖭 🔗 16 Therapy	11/05/2011 📋 ZOCOR tabs	10mg	2 7	TAKE ONE AT NIGHT	28 table	t 1	0/05/2011
- A Lifestyle - M Examination Findings - • 21 Immunisations	] 11/05/2011 📋 WARFARIN S	ODIUM tabs 3mg	1 5	TAKE DNE AS DIRECTED Notes for dispenser: Alice Notes for patient: Bob	28 table	t (	9/05/2011
Misselleneous							

- 5. Select **Print** or press **F9** on your keyboard, check the details and if correct select **Print/Finalise** or press **F9** on your keyboard to print the prescription. If prompted to preview the drug label details check the information and select **Continue**.
- 6. The 'The Vision Online Repeat request has been fulfilled, would you like to return to Mail Manager? Remember my selection for this session (until Consultation Manager is restarted), Yes/No' message displays:
  - Select **Yes**, and you are returned to **Mail Manager**. The completed message status displays as filed and completed. Your patient's online account displays that the request is processed.
  - Select No, to stay with Consultation Manager.
- 7. Select the next prescription request and repeat steps 2 7.



#### To manually complete a repeat prescription request:

If you have issued the requested prescription manually, you must mark the **Online prescription** message as **Read**.



- 1. From Mail Manager Mail Manager select the Online Prescription request you wish to manually complete.
- 2. Right click and select Mark as Read.
- 3. Right click again and select Mark as Complete.
- 4. The **Event Log** window displays and you are prompted 'Are you sure you wish to mark this message as complete? Please supply a reason for marking this message as complete. The patient will be able to view this text within Online Repeats'. Enter the reason for manually completing the message:

Event L	og - Message Mark as Complete	X
1	Date: 20/07/2017-08:40 Staff: Patient: Abbott, Catherine 19/05/1925 Type: Online Repeat From: Message Reference: 3ED37A52-867C-4D23-839F-7A55EF5E8B04	
	Are you sure you wish to mark this message as complete? Please supply a reason for marking this message as complete.	
	Item added by hand to previous prescription(	
	The patient will be able to view this text within Online Repeats.	

- 5. Select OK.
- 6. The request is marked as complete, and the status of the request is updated to **Processed** on the patient's online account.



#### To process the request without issuing all the items:

There may be occasions when you are unable to issue all the items requested by the patient, for example, medication may have been recently changed.



- 1. From Mail Manager Mail Manager, select Incoming Mail Mail Categories Online Prescriptions.
- 2. Request messages are initially displayed with an **Available for filing** status. Highlight the message you want to process. Check the request details displayed in the bottom pane, if the patient has added a message you can view it from here.
- 3. Highlight the message you want to process, right click and select File All.
- 4. A **Repeat Issue** consultation automatically starts for the patient in **Consultation Manager** and the **Therapy Repeat** screen displays with the requested items selected.
- 5. Remove the tick from the items you do not want to issue.
- 6. Print the remaining prescriptions in the usual way and then select **Close Consultation** .
  - Consultation **L**
- The 'Not all items in the Online Repeat Request have been issued. Do you want to mark the request as complete?' message displays, select Yes:



- 8. You are prompted to give a reason for not issuing all the items. Enter the name of the drug and the reason why this has not been issued. This message displays for the patient.
- 9. Select OK.
- 10. The request is now marked as **Filed** in **Mail Manager**.



#### To reject a prescription request

If you do not wish to issue a prescription requested by a patient, you can reject it.



- 1. From Mail Manager Mail Manager, select Incoming Mail Mail Categories - Online Prescriptions.
- 2. Locate and right click on the message required and select **Message - Cancel/Supersede**:

Actions		⊧	
Alerts		•	
Allocate to Staff Re-Allocate to Staff		* *	
Agsign to Patient Re-Agsign to Patient			
<b>File All</b> File A <u>b</u> normal Consider Filing Complete Edit filed item <u>D</u> elete filed item	F9		
<u>M</u> ark as Read Mark as UnRead Mark as Comple <u>t</u> e			
M <u>e</u> ssage		P.	Hold Message
Vie <u>w</u> messages for Patient View original <u>P</u> atient Details View future app <u>o</u> intments			Rem <u>o</u> ve Message Reactivate Message Reacti <u>v</u> ate as held Regrocess
Print	Ctrl+P		Cancel / Supersede Reinstate Message
Archiving		Þ	Copy Message
Consultation Manager			Delete Cop <u>y</u> Delete Message

- The 'Are you sure you wish to mark this message as cancelled/superseded? (You will not be able to reinstate this message) Please supply a reason for cancelling this message.' message displays. Enter a message if required, this is optional but recommended as the patient is able to see why the prescription was rejected.
- 4. Select **OK**.



5. A confirmation message displays confirming the cancellation and showing the reason (if added):



6. Select **OK** to close.

The online prescription request in **Mail Manager** is marked as **Cancelled/superseded** and the request status on the website updates, so the patient knows their request is rejected, and the reason why.



### **Processing Online Acute Prescription Requests**

When a patient requests an acute prescription (also called Additional Medication Request), via your patient online services website, the request displays in **Mail Manager**. All prescription requests list in both the **Incoming Mail** and **Unallocated Mail** folder of **Mail Manager** they are not allocated to a specific staff member and can be viewed by all **Mail Manager** users.

To process an acute prescription request:



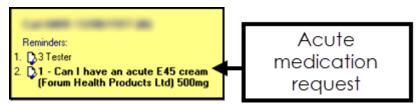
, select Incoming Mail - Mail

- 1. From Mail Manager Categories Online Prescriptions.
- 2. Request messages initially display with an **Available for filing** status. Highlight the message you want to process and the detail displays in the bottom half of the screen:

		Status	Туре	Read	Date	Staff	Patient	Action/Subject 0
		📇 Available for filing	Online Prescription		19/09/2016 15:32		The large second	N
4								
	Prescr	iption Request for						
		1						
	Reques	t made on 19/09/2016 15	:32:41					
	Addition	nal Patient Request						
	Addido	nai radent request						
	1 - Can	I have an acute E45 cream	(Forum Health Produc	ts Ltd)	500mg			
_								

**Note** - The request completed by your patient is free text.

- 3. Right click on the message and select File All.
- 4. **Consultation Manager** automatically opens with the correct patient and the **Therapy** tab displaying. The free text request from your patient displays on the yellow **Reminder**:



Add the medication in the usual way following your practice protocols.



5. Double click on the request on the reminder and the **Process Additional Online Prescription Request** screen displays:

> **Note** - If you deselect the patient without double clicking the reminder, the **Process Additional Online Prescription Request** is automatically triggered.

	ute £45 cream (Forun	n Health Products Ltd	l) 500mg	×
Please select one of	the following options:			
C Patient request e	ntirely fulfilled.			
C Patient request p	artially fulfilled.			
🗖 No furthe	actions will be taken	to meet this request.		
C Patient request re	ejected.			
Supporting Notes:				×

- 6. Complete as appropriate:
  - **Patient request entirely fulfilled** Select to record the request has been fulfilled in full.
  - Patient request partially fulfilled Select to record the request has only partially fulfilled.
    - No further actions will be taken to meet this request If only part of the request has been fulfilled, but the rest is not going to be fulfilled tick to complete the process. If you do not tick this the request remains outstanding on the reminder with a lined icon in front of the reminder.
  - Patient request rejected Select to refuse the request.
  - Supporting Notes Comments entered here appear on the patient's online services account, they should inform the patient of action you have taken and reasons if appropriate.
  - If you select Cancel, a 'The Additional Patient Prescription Request has not been fulfilled. Do you want to mark the request as complete?' warning displays.
    - Select **Yes** to complete the request.
    - Select **No** to leave the request outstanding.



9. Select **OK**.

In Mail Manager, the request displays as either:

- Filed, if you selected to fulfilled or partially fulfilled the request, or
- **Rejected**, if you rejected the request:

Π	1 100	offilino f rooonpaon	•	101001201010.02
	💼 Filed	Online Prescription	✓	19/09/2016 15:40
	🕮 Available for filing	Online Prescription		20/09/2016 15:56
	_			



# **Online Prescription Request Report**

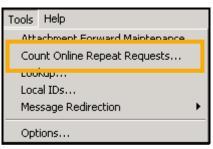
A report can be run to count the number of online prescription requests within a specific time frame:



1. From Mail Manager

Mail Manager select Tools.

2. Select Count Online Repeat Requests:



- 3. Select either:
  - All dates for a count of all requests received to date, or
  - From Date and To Date to search for a specific date.
- 4. Select Run.
- 5. Select Close.



# **Online Prescription Troubleshooting**

#### Patient Not Registered

Repeat requests for inactive patients, for example, transferred out patients, cannot be processed. When you select a message for inactive patients, you are prompted "Warning this message is assigned to an inactive patient". This also displays in the message details screen.

#### Event Log

An audit trail of all **Prescription Request** messages can be viewed in the **Event** Log:

From **Management Tools - Event Log**. There are two Event Types for Online Repeats:

- Online Repeat Completed
- Online Repeat Request Received



# Appendix

### Using the Message Editor

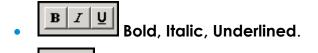
The message editor allows you to format messages displayed online. It is available in the **Welcome**, **Appointments** and **Prescription** message configuration screens:

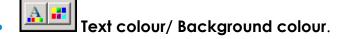
	💐 Vision Online Services Global Configuration 📃 🔰 🚬
	Web Browser
Language option only available in Wales	Welcome Registration NHS Mail   Welcome Message: English   Source Arial     B U     Arial     Arial
	<u>D</u> K <u>Cancel</u> <u>H</u> elp

Enter your message in the welcome message screen using the following formatting:

•	Welcome Message: English  Welcome Message (Wales only) -
	Select a language for this version, remember you should be adding both an English version and a Welsh version.
•	<b>Source</b> - Displays the HTML source of the message and is the only way you can add tables. If you are comfortable working with HTML tags, you may want to use this view to edit the HTML directly.
•	Font - Allows you to change the font.
•	<b>Font size</b> - Allows you to increase and decrease the text size of the highlighted text.







- Bulleted/numbered list.
- Decrease/increase indent.



### Formatting HTML Messages

Messages can be formatted using HTML formatting tags. HTML tags are:

- Used either side of a keyword, for example, <html> you wish to format.
- The tag always has angle brackets, for example, <html> denoting the starting and closing of the tag.
- HTML tags normally come in pairs, for example, <b> (the starting tag) and </b> (the closing tag)
- You can use multiple tags, but each tag must have brackets at the start and end of the tag, for example, <b>

This is a list of the most common codes:

Starting Tag	Closing Tag	Description
<h1></h1>	<h1></h1>	First Heading. Headings can be defined with <h1> to <h6> tags. <h1> is the largest heading and <h6> is the smallest.</h6></h1></h6></h1>
	<,/p>	Paragraph
<b></b>		Bold text
<big></big>		Big text
<i></i>		Italic text
<small></small>		Small text
<sub></sub>		Subscript text
<sup></sup>		Superscript text
		This tag adds a single line break, it does not need a closing tag.

For example applying the bold <b> tag to the 1st line of the message like this:

<b>Welcome to the Visionary Healthcare Practice</b>

Displays as:

• Welcome to the Visionary Healthcare Practice

**Note** - If you want to add an image to your message, you must link to an image which can be accessed over the Internet and not one stored locally. Locally stored images cannot be displayed on the website.