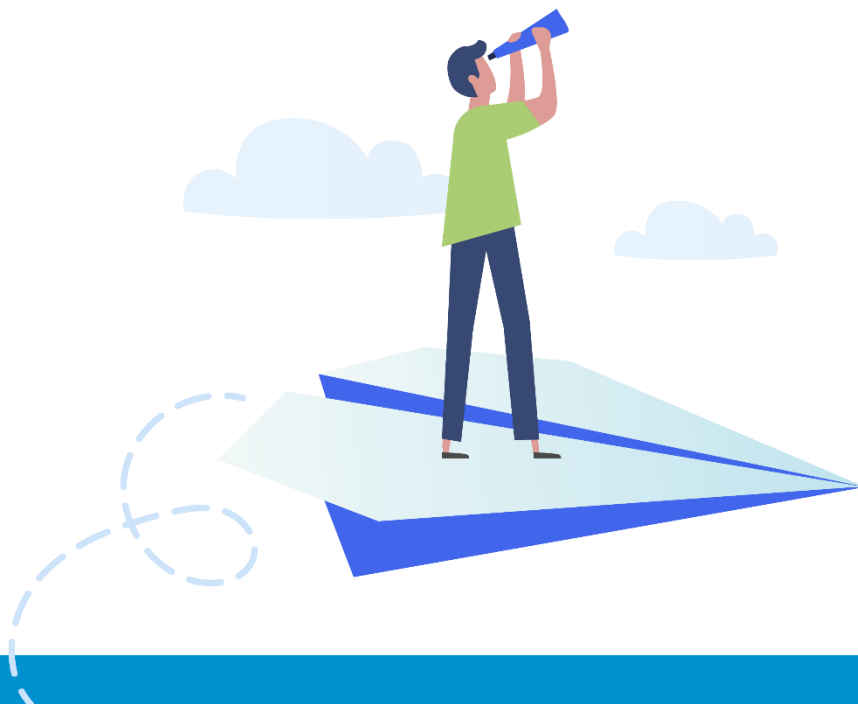




Vision 3 Release Guide DLM 800

Version 1.5

13th December 2021



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Vision 3 Release DLM 800

Summary of Changes

Consultation Manager


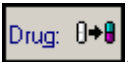
Vision 3 release **DLM 800** contains the following new features and improvements for **Consultation Manager**:

- **Medication** - The following updates to prescribing medication are included in this release:
 - **NHS Prescribing Price Information** – In **Scotland** the NHS Prescribing Price Information is now country specific.




Training Tip - You can display NHS Prescribing Price

Information from **Pack Information**  and from **Packs** in the bottom half of the **Select Drug** screen.

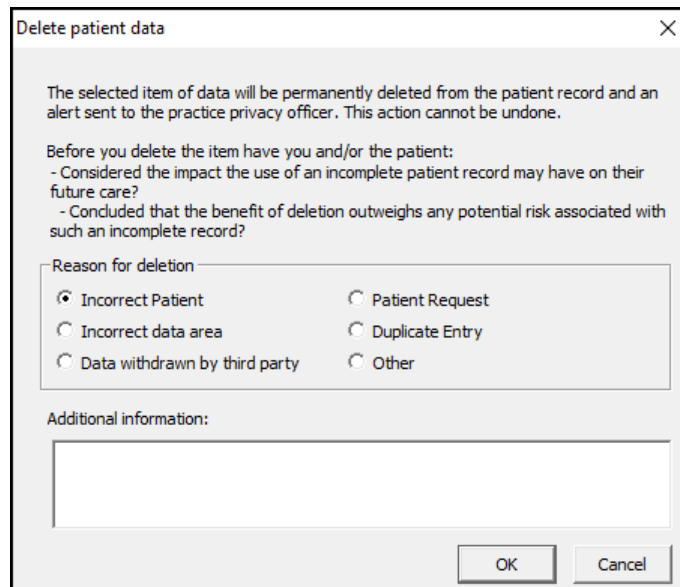
- **Switch to Generic** - Any **Quantity** and **Dosage** instructions completed by default or manually entered on a medication, are now retained when you select **Switch to Generic**  or **Switch to Brand** .
- **Maximum number of Repeats** - You can now set a maximum number of issues that can be attributed to a Repeat Master. This can be set as a practice wide setting or a prescriber setting.



See [Maximum Number of Repeats](#) on page [12](#) for details.

- **Immunisation** - The issue of the **Show all** setting on the **Immunisation - Add** screen not working, has been addressed.
- **Alerts Pane** - If you are using a **Vision 3** view without a navigation pane, when you select **Show Alerts**  they now display on the left hand side of your screen.

- Deleting Clinical Data** - You can no longer delete a **Consultation** with entries in it. To delete an entire consultation, each entry within it must be deleted individually before deleting the empty **Consultation**. If you select to delete clinical data, the **Delete patient Data** screen now displays prompting you to select a reason:



Delete patient data [X]

The selected item of data will be permanently deleted from the patient record and an alert sent to the practice privacy officer. This action cannot be undone.

Before you delete the item have you and/or the patient:

- Considered the impact the use of an incomplete patient record may have on their future care?
- Concluded that the benefit of deletion outweighs any potential risk associated with such an incomplete record?

Reason for deletion

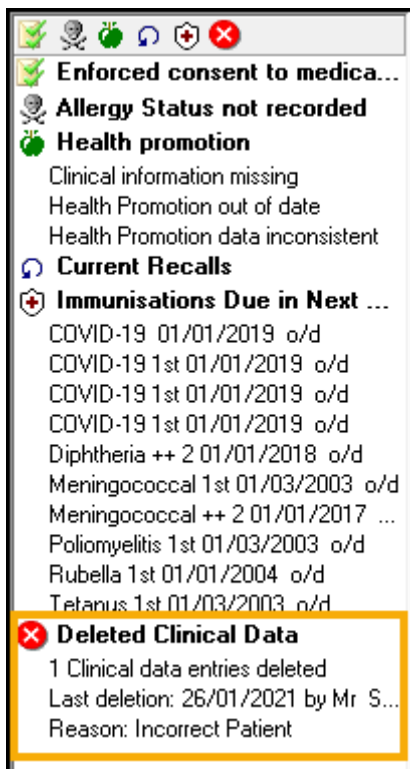
Incorrect Patient Patient Request
 Incorrect data area Duplicate Entry
 Data withdrawn by third party Other

Additional information:

[Text Area]

OK Cancel

Where there is deleted clinical data, within a patient record, it now displays within the **Alerts** pane:



Enforced consent to medica...
 Allergy Status not recorded
 Health promotion
 Clinical information missing
 Health Promotion out of date
 Health Promotion data inconsistent
 Current Recalls
 Immunisations Due in Next ...
 COVID-19 01/01/2019 o/d
 COVID-19 1st 01/01/2019 o/d
 COVID-19 1st 01/01/2019 o/d
 COVID-19 1st 01/01/2019 o/d
 Diphtheria ++ 2 01/01/2018 o/d
 Meningococcal 1st 01/03/2003 o/d
 Meningococcal ++ 2 01/01/2017 ...
 Poliomyelitis 1st 01/03/2003 o/d
 Rubella 1st 01/01/2004 o/d
 Tetanus 1st 01/03/2003 o/d
 Deleted Clinical Data
 1 Clinical data entries deleted
 Last deletion: 26/01/2021 by Mr S...
 Reason: Incorrect Patient

 See [Deleting Entries](#) on page [15](#) for details.

- **Patient Identification** - The following identification types are now available to select from the **Identification - Add** screen in both **Consultation Manager** and **Registration**:
 - Biometric residence permit
 - Travel document
 - HC2 certificate
 - ARC card



Control Panel

Vision 3 release **DLM 800** contains the following new features and improvements for **Control Panel**:

- **Appointments** - If you have migrated to our fabulous new **Appointments Setup** app for the set up and maintenance of your Appointment books. Holidays, bank holidays, meetings and other ad-hoc events are now set up from the **Appointment Events** option in **Control Panel**.

 See [Creating Events for Appointments Setup](#) on page [15](#) for details.

- **Privacy Officer Group** - To comply with Information Governance standards a **Privacy Officer** staff group is now available from **Management Tools - Control Panel - File Maintenance - Staff Groups**. This group must be populated with your designated Privacy Officer(s) as soon as possible.

To ensure appropriate governance of actions is maintained, your practice designated **Privacy Officer(s)** receives the following in **Daybook** or **Tasks**:

- **A task requiring action** - A full alert:
 - When patient data is deleted.
 - When a transferred out patient record is accessed, more than 28 days after being deducted.
- **An announcement** - A warning:
 - When a transferred out patient record is accessed less than 29 days after being deducted.
 - When a transferred out patient record is accessed as a result of running a report.

The **Privacy Officer(s)** must check announcements and tasks of this type to ensure the actions are valid and, where a task is raised,



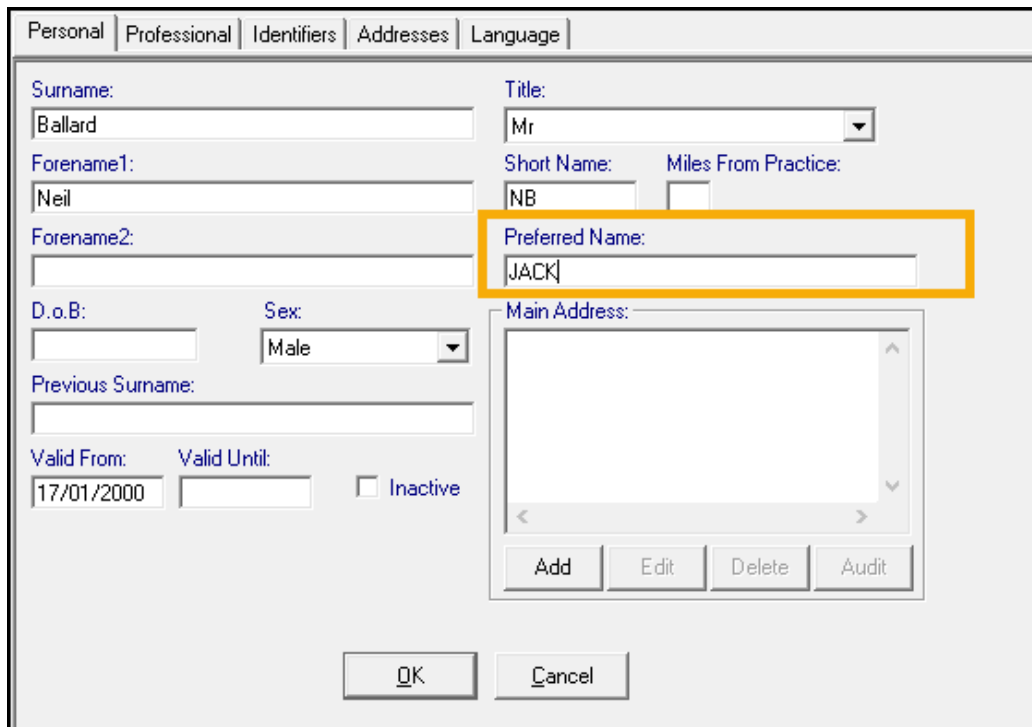
select **Complete** to confirm it has been checked.

The information provided is:

- Date and time of the action.
- The staff member logged on.
- The reason entered.

 See [Privacy Officer Group](#) on page [22](#) for details.

- **Show Deleted Records** - Within **Control Panel - Security - Vision Functions - Consultation Manager** there is a new **Show Deleted Records** options. This defaults to **System Managers** only. To permit additional staff to view deleted records, you need to add either the individual user or a group of users to the **Vision Function**.
- **Preferred Name** - You can now add and maintain preferred names for staff members within **Vision 3** if required. To add a preferred name:
 1. From the **Vision 3** front screen, select **Management Tools - Control Panel - File Maintenance - Staff**.
 2. Highlight the staff member required, right click and select **Edit Staff**.
 3. The **Personal** tab displays:



The screenshot shows the 'Personal' tab of the staff edit form. The fields are as follows:

- Surname: Ballard
- Title: Mr
- Forename1: Neil
- Short Name: NB
- Miles From Practice: [empty]
- Forename2: [empty]
- Preferred Name: JACK (highlighted in yellow)
- D.o.B: [empty]
- Sex: Male
- Previous Surname: [empty]
- Main Address: [empty text area]
- Valid From: 17/01/2000
- Valid Until: [empty]
- Inactive:

Buttons at the bottom: OK, Cancel, Add, Edit, Delete, Audit.

4. In **Preferred Name** enter the preferred name of your staff member.
5. Select **OK** to save.



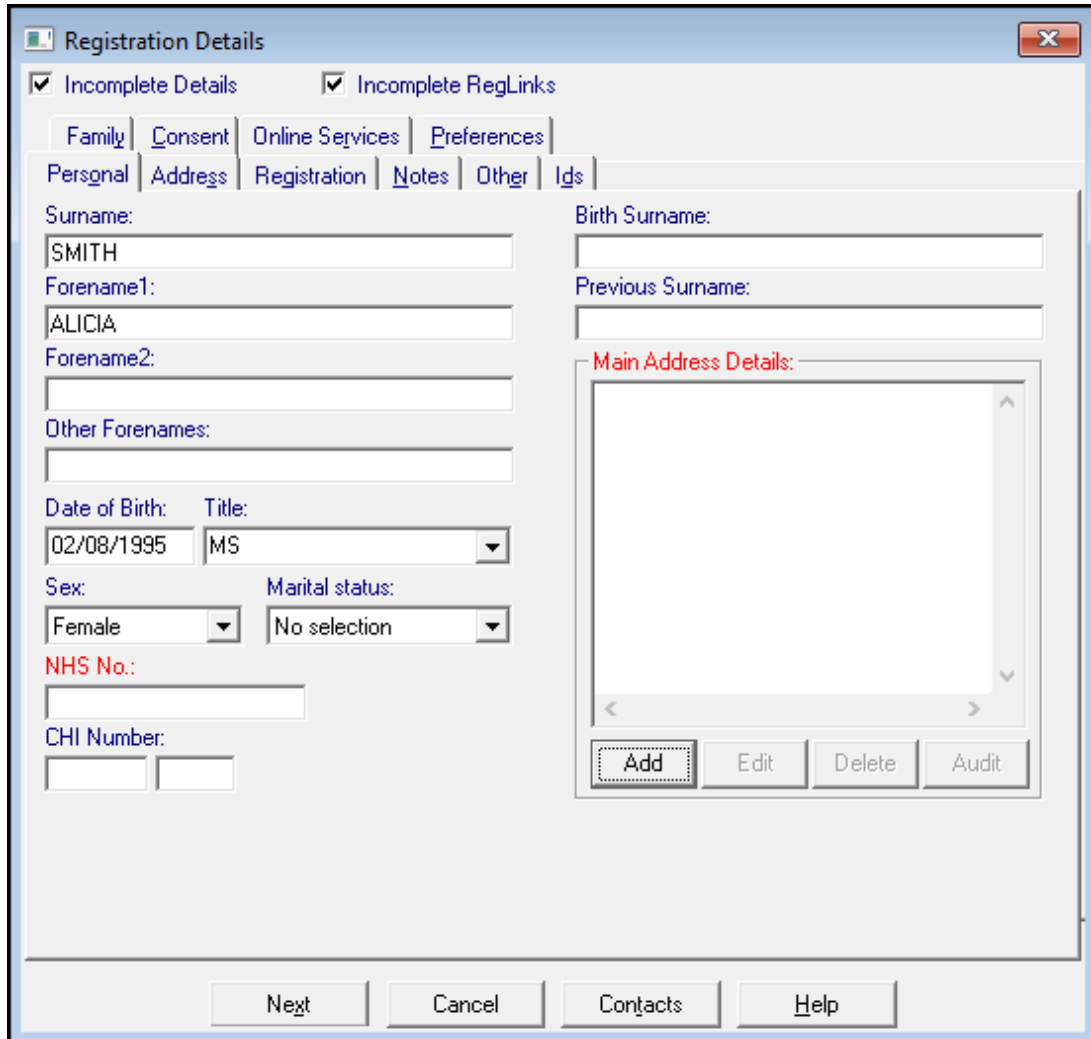
Note - This does not currently display elsewhere.

- **Staff Groups** – To support future **Fast Healthcare Interoperability Resources (FHIR)** functionality, a **\$TasksAdmin** Group has been added to your system. This is automatically populated in England with any member of staff with the **ROL020 Business activity** and in Scotland, Wales and Northern Ireland with any staff allocated the **Practice Manager** role.

Registration


Vision 3 release **DLM 800** contains the following new features and improvements for **Registration**:

- **Registration Details** - When you are adding a new patient and completing the **Registration Details** screens, you now have a **Next** option to guide you through the screens:



Once you get to the **Preferences** tab, **OK** displays.

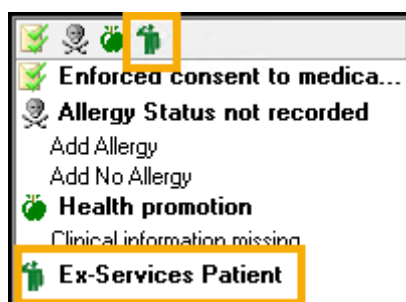
- **Ex-services Patients** - Within the **Preferences** tab, there is now an **Ex-services** option. To record service details, select **Ex-services** and complete the **History - Add** screen as required, the clinical term defaults **13Ji.00 Military veteran**:



If you update the clinical term, for example, **Royal Navy veteran**, you are given the option to enter the data in the **Occupation** Structured Data Area (SDA), select as required.

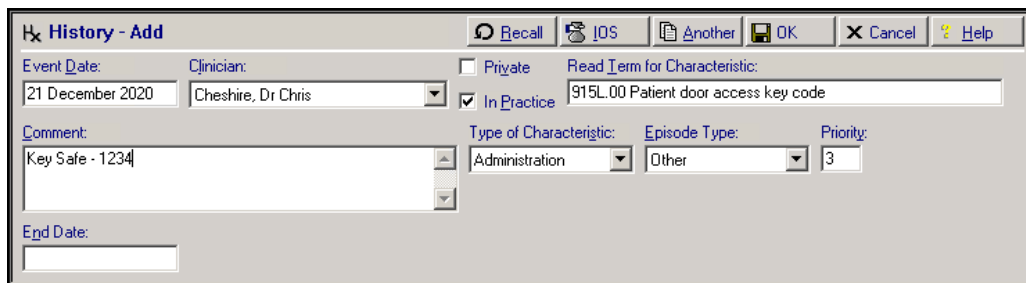
Select **OK** to save.

The selected term displays alongside the **Ex-services** option in the patient's **Registration** and displays in the **Alert pane** in the patient's clinical record:



- **Safe Key** - You can now record Safe Key details from **Registration**. You can record this for existing patients as required and add it as part of your registration process for new patients. To record the Safe Key:
 1. From within **Vision 3 Registration**, select the patient and then select their **Preferences** tab.

Select **Safe Key** and the **History - Add** screen displays:



2. The clinical term defaults to **915L.00 Patient door access key code**, enter the code(s) into **Comment** and then select **OK** to save.

- **Out of Area** - You can now record that a patient, either new or existing, is residing outside of your catchment area. You can also now search for patients that are marked as **Out of Area**.

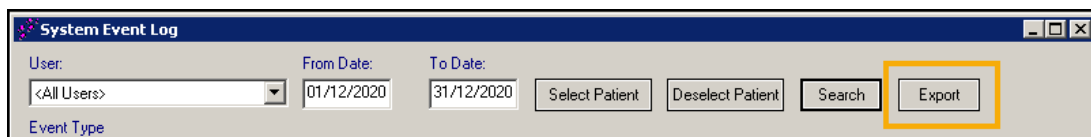


See [Out of Area Patients](#) on page [22 for details](#).

Other Updates

Vision 3 release **DLM 800** also contains the following new features and improvements:

- **Event Log** - You can now export **Event Log** files in CSV format. Simply create and run your search in the usual way and then select the new **Export** option:



The **Save As** screen displays, the default location is **P:\Export\Exported Events**, give your file a name and select **Save**. This file can now be opened, manipulated and shared as a normal Excel spreadsheet file.



Note - Patient names are not exported.

- **Registration Links** - The issue of **Upload transactions** not processing during the **Registration Links** update in **Mail Gateway** has been addressed.

Maximum Number of Repeats

Within **Vision 3**, you can set a maximum number of issues that can be attributed to a Repeat Master.

This can be set as a practice wide or a prescriber setting depending on your practice protocols:

Practice Wide Setting

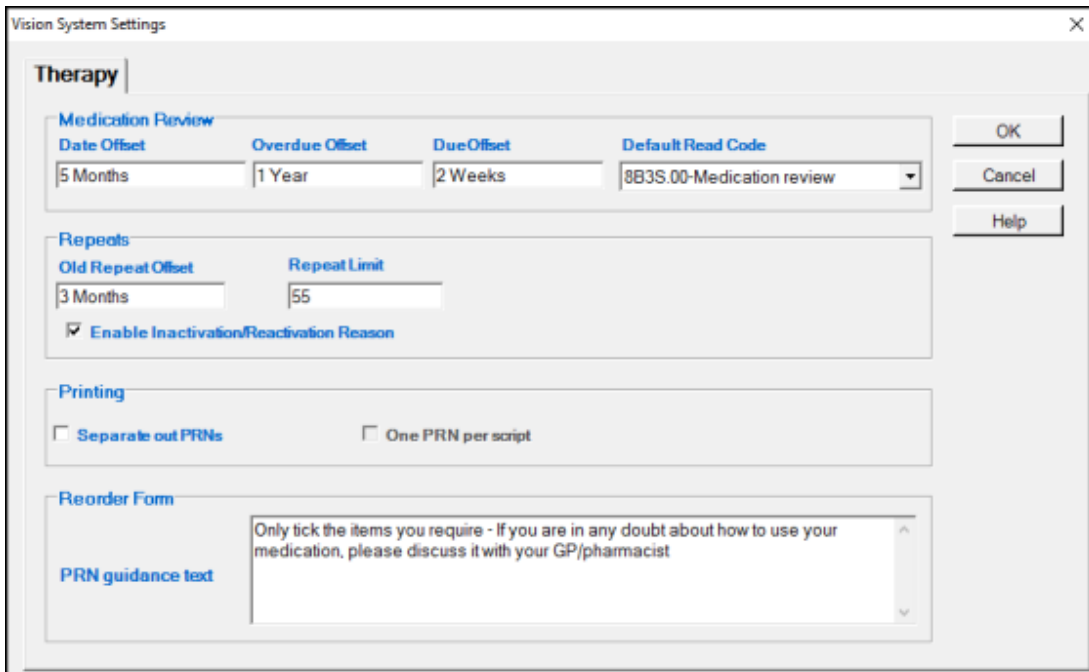
To apply a practice wide maximum issue number:

1. From the **Vision 3** front screen, select **Management Tools - Control Panel**

- **File Maintenance - Settings**



2. The **Therapy** screen displays. Practice wide medication settings are added and maintained here including the practice wide **Repeat Limit**:


 A screenshot of the "Vision System Settings" window, specifically the "Therapy" tab. The window has a title bar with "Vision System Settings" and a close button. The "Therapy" section is highlighted. It contains several sub-sections:

- Medication Review:** Includes fields for "Date Offset" (5 Months), "Overdue Offset" (1 Year), "Due Offset" (2 Weeks), and a "Default Read Code" dropdown menu (8B3S.00-Medication review). There are "OK", "Cancel", and "Help" buttons to the right.
- Repeats:** Includes "Old Repeat Offset" (3 Months) and "Repeat Limit" (55). There is a checked checkbox for "Enable Inactivation/Reactivation Reason".
- Printing:** Includes two checkboxes: "Separate out PRNs" (unchecked) and "One PRN per script" (unchecked).
- Reorder Form:** Includes a "PRN guidance text" label and a text area containing the text: "Only tick the items you require - If you are in any doubt about how to use your medication, please discuss it with your GP/pharmacist".

3. Enter the maximum number of repeats anyone in your practice can authorise in **Repeat Limit**. By default:
 - **England, Wales and Northern Ireland** - Defaults to **366**, update as required with a maximum of 999.
 - **Scotland** - Defaults to **99**, update as required with a maximum of 99.
4. Select **OK** to save.

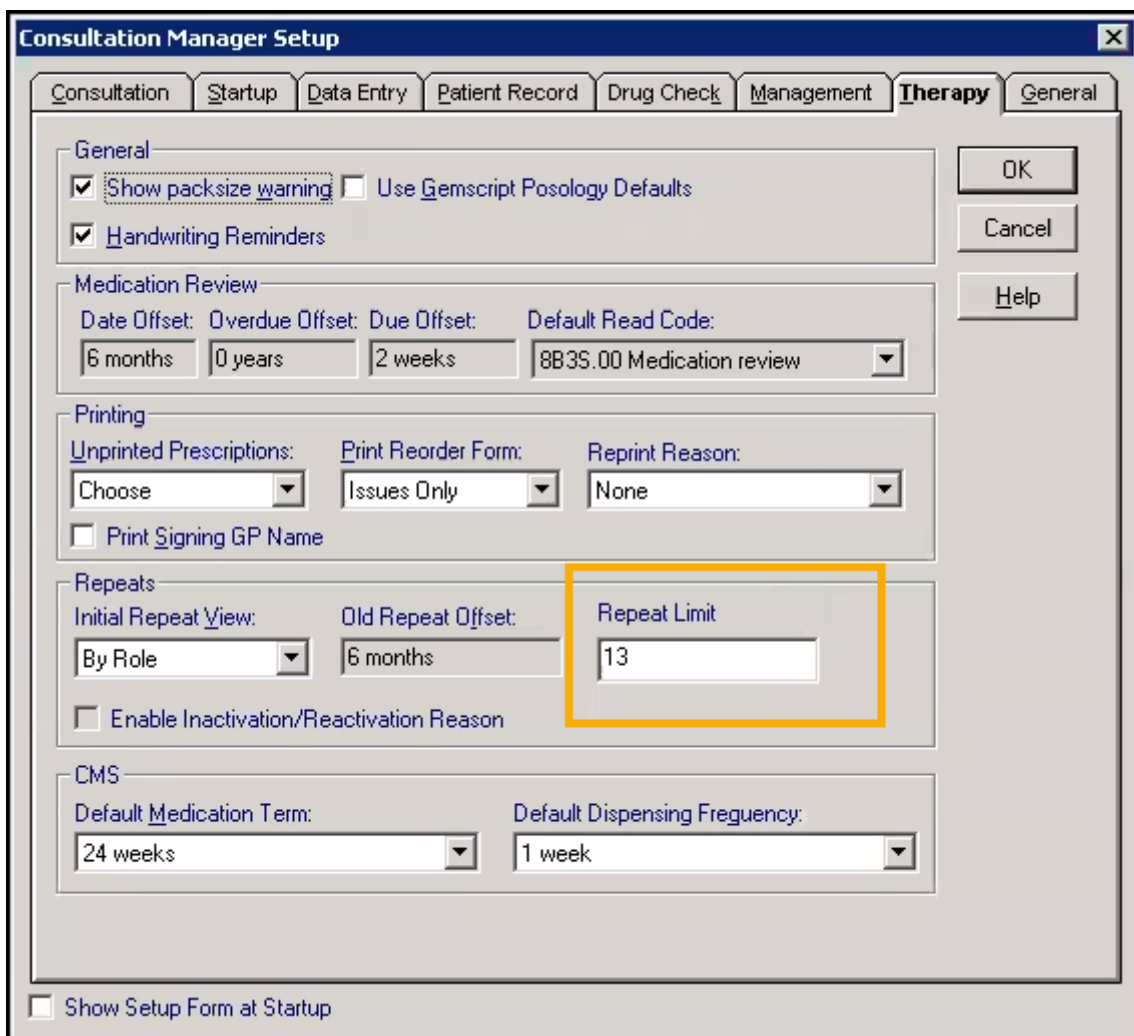
Prescriber Setting

To apply a maximum issue number by prescriber:


1. From the **Vision 3** front screen, select **Consultation Manager**



2. Select **Consultation - Options - Setup** and then the **Therapy** tab.
3. In **Repeat Limit**, enter the maximum number of repeats permitted, this defaults to the practice wide limit:

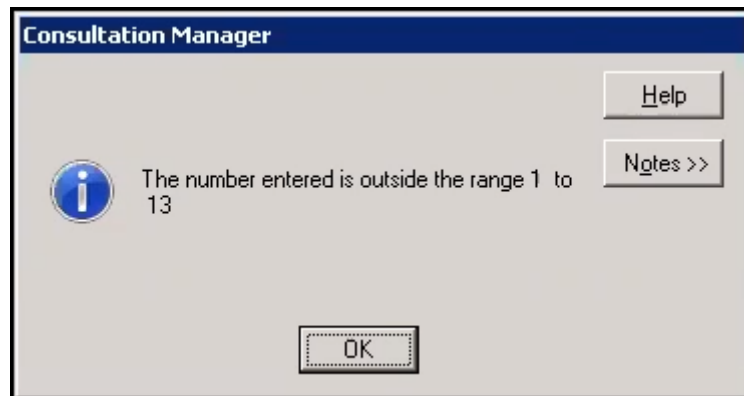


The screenshot shows the 'Consultation Manager Setup' dialog box with the 'Therapy' tab selected. The 'Repeat Limit' field in the 'Repeats' section is highlighted with a yellow box and contains the value '13'. Other fields include 'Show packsize warning' (checked), 'Handwriting Reminders' (checked), 'Date Offset' (6 months), 'Overdue Offset' (0 years), 'Due Offset' (2 weeks), 'Default Read Code' (8B3S.00 Medication review), 'Unprinted Prescriptions' (Choose), 'Print Reorder Form' (Issues Only), 'Reprint Reason' (None), 'Initial Repeat View' (By Role), 'Old Repeat Offset' (6 months), 'Default Medication Term' (24 weeks), and 'Default Dispensing Frequency' (1 week). Buttons for 'OK', 'Cancel', and 'Help' are visible on the right side.

 **Note** - You cannot enter a number greater than the practice wide limit here.

4. Select **OK** to save.

If you try to create a Repeat Master with a number of repeats greater than, either your prescriber limit, or if no prescriber limit is set, the practice wide limit the following warning displays:



Select **OK** and reduce the number of Repeats in the master.

Deleting Entries

Occasionally you may need to delete an entry from a patient's record, for example, it may have been added to the wrong patient. Most entries are deleted in the same way:



1. From **Consultation Manager**, open the patient required and locate the data that needs deleting.
2. Right click on the entry and select **Delete**.
3. The **Delete** screen displays, select **Delete** again.
4. **The Delete patient data** screen displays:

Delete patient data ✕

The selected item of data will be permanently deleted from the patient record and an alert sent to the practice privacy officer. This action cannot be undone.

Before you delete the item have you and/or the patient:

- Considered the impact the use of an incomplete patient record may have on their future care?
- Concluded that the benefit of deletion outweighs any potential risk associated with such an incomplete record?

Reason for deletion

<input checked="" type="radio"/> Incorrect Patient	<input type="radio"/> Patient Request
<input type="radio"/> Incorrect data area	<input type="radio"/> Duplicate Entry
<input type="radio"/> Data withdrawn by third party	<input type="radio"/> Other

Additional information:

5. Select the appropriate **Reason for deletion** and enter any **Additional information** if required.
6. Select **OK** to save.

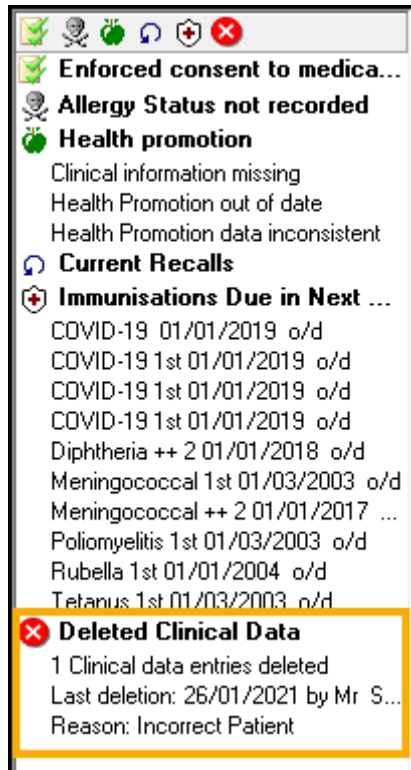








Training Tip - If you delete an immunisation which is part of a compound, for example MMR, the associated entries are also removed.







A task is automatically sent to your designated **Privacy Officer(s)** notifying them of this deletion.

Viewing Deleted Entries


If a patient has deleted entries on their record, you are alerted in the **Alerts pane**:



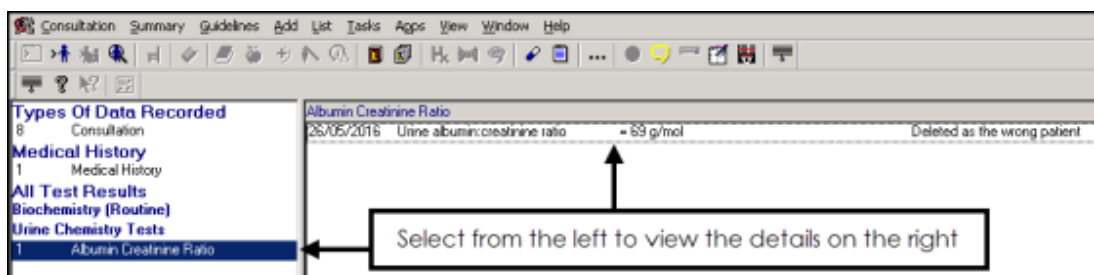
-  **Enforced consent to medica...**
-  **Allergy Status not recorded**
-  **Health promotion**
 - Clinical information missing
 - Health Promotion out of date
 - Health Promotion data inconsistent
-  **Current Recalls**
-  **Immunisations Due in Next ...**
 - COVID-19 01/01/2019 o/d
 - COVID-19 1st 01/01/2019 o/d
 - COVID-19 1st 01/01/2019 o/d
 - COVID-19 1st 01/01/2019 o/d
 - Diphtheria ++ 2 01/01/2018 o/d
 - Meningococcal 1st 01/03/2003 o/d
 - Meningococcal ++ 2 01/01/2017 ...
 - Polioyelitis 1st 01/03/2003 o/d
 - Rubella 1st 01/01/2004 o/d
 - Tetanus 1st 01/03/2003 o/d
-  **Deleted Clinical Data**
 - 1 Clinical data entries deleted
 - Last deletion: 26/01/2021 by Mr S...
 - Reason: Incorrect Patient

To view deleted records for a patient:

 **Note** – You, or a group you belong to must be added to the **Show Deleted Records** within **Control Panel - Security - Vision Functions - Consultation Manager** to view deleted records, see [Adding and Removing Users and Groups from Vision Functions](#) in the **Management Tools Help Centre** for details.



1. From **Consultation Manager**, select the patient required.
2. From **Consultation** select **Options - Show Deleted Records**.
3. The title bar displaying the patient's demographic details displays in red and the **Status Bar** states **DISPLAYING DELETED DATA**.
4. Select **Summary - Medical Overview**.
5. A list of all the patient's deleted data displays, simply select the data type on the left to view the details on the right:



6. To return to live data mode, from **Consultation**, select **Options - Show Deleted Records** again to remove the tick.

Creating Events for Appointments Setup

Annual leave, public holidays, study leave and other ad-hoc changes to your appointment books are referred to as **Events**.

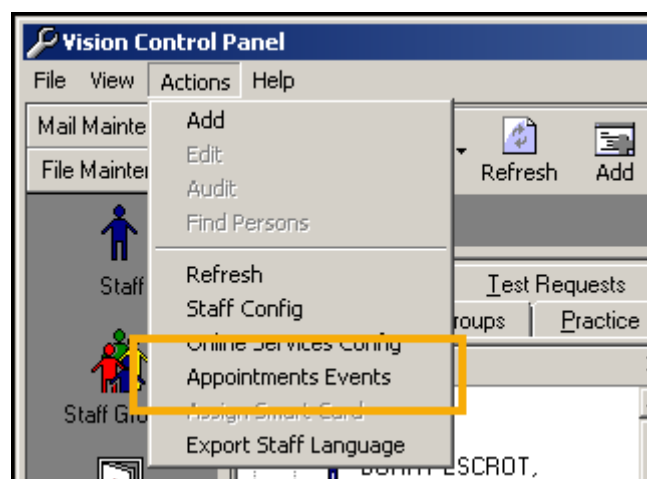
From DLM 800, if you have migrated to our fabulous easy to use app, **Appointments Setup**, for maintaining your appointment books, **Events** are set up and maintained from **Control Panel**.

Ad-hoc Events

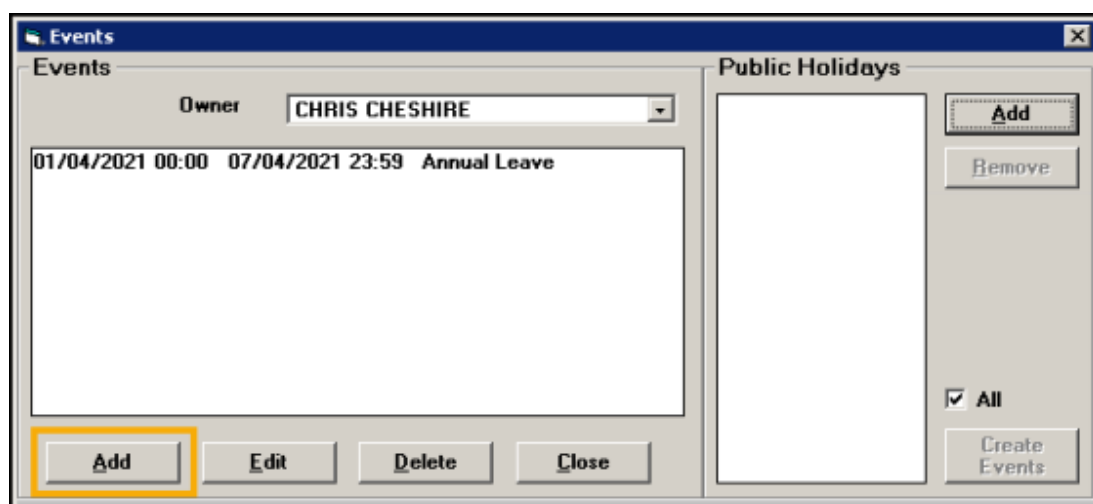
 **Note** – Staff responsible for managing **Appointments Events** need to have security rights to access **Control Panel – File Maintenance**.

To set up an ad-hoc **Event**, for example, annual leave, study leave and meetings:

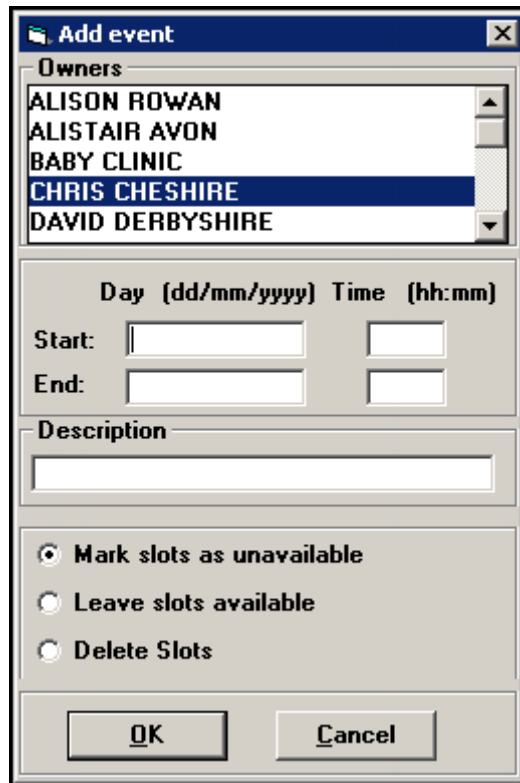
1. From the **Vision 3** front screen, select **Management Tools - Control Panel - Actions - Appointments Events**:



2. The **Events** screen displays:



3. Select **Add** and the **Add event** screen displays:



4. Complete as required:
- **Owners** - Select the owner(s) of the **Event**.
 - **Day:**
 - **Start** - Enter the first day of the event, if the event is a part day, enter a start **Time**.
 - **End** - Enter the last day of the event, if the event is a part day, enter an end **Time**.
 - **Description** - Enter a description for the event, for example, 'Annual Leave', or 'User Group Meeting'.



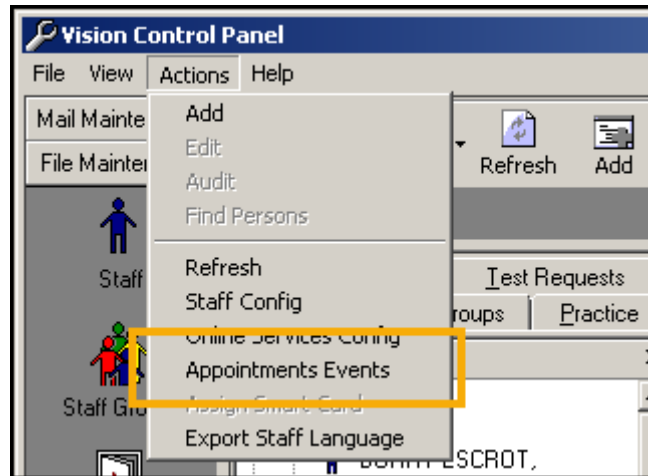
Training Tip - For annual or study leave 'Back on dd/mm' is useful.

- **Mark slots as unavailable** - Select to block out any slots in the time frame of the event.
 - **Leave slots available** - Select to leave slots in the time frame of the event available, for example, if you are planning to cover with a locum.
 - **Delete Slots** - Select to remove any slots in the time frame of the event.
5. Select **OK** to save.
6. Select **Close**.

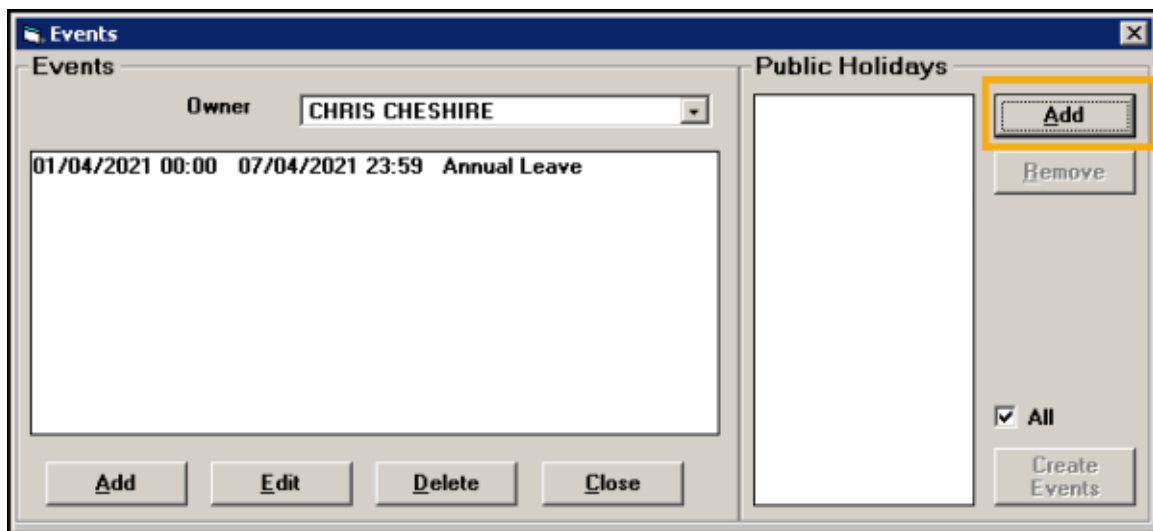
Public Holidays

To set up a public holiday, for example, Christmas, Easter and Bank holidays:

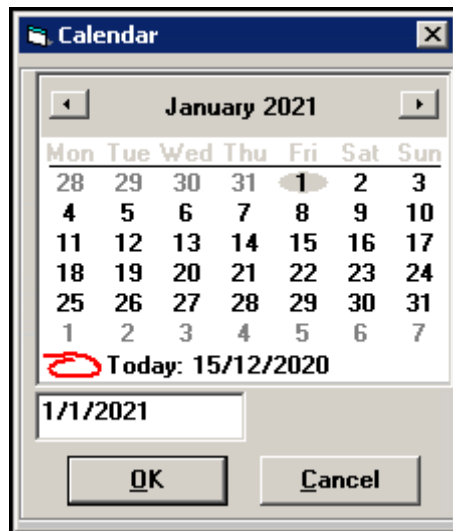
1. From the **Vision 3** front screen, select **Management Tools - Control Panel - Actions - Appointments Events**:



2. The **Events** screen displays:



3. Select **Add** and the **Calendar** displays.
4. Highlight the date required and select **OK**:



5. Repeat steps 3 and 4 until all the public holidays you want to add are on the list.
6. Tick **All**.
7. Select **Create Events**.
8. Select **Close**.

All the public holidays you have added are now added to all book owners.



Remember - This setting is in **Control Panel** if you are using **Appointment Setup**, it remains in **Vision 3 Appointments** if you have yet to migrate.

Privacy Officer Group

To ensure appropriate governance of actions is maintained, your practice designated **Privacy Officer(s)** receives the following in **Daybook** or **Tasks**:

- **A task requiring action** - A full alert:
 - When patient data is deleted.
 - When a transferred out patient record is accessed, more than 28 days after being deducted.
- **An announcement** - A warning:
 - When a transferred out patient record is accessed less than 29 days after being deducted.
 - When a transferred out patient record is accessed as a result of running a report.

The **Privacy Officer(s)** must check announcements and tasks of this type to ensure the actions are valid and, where a task is raised, select **Complete**



to confirm it has been checked.

The information provided is:

- Date and time of the action.
- The staff member logged on.
- The reason entered.

Maintaining the Privacy Officer Group

A **Privacy Officer** group is automatically created in **Control Panel**. The **Privacy Officer** group cannot be empty and must contain at least one member of staff:

- In **England**, it is automatically populated with any staff members with the following RBAC roles:
 - **ROL020 Practice Manager.**
 - **ROL001 Senior Partner.**
- In **Scotland, Wales** and **Northern Ireland**, the Privacy Officer group is populated with staff members with the following roles, as set up in **Control Panel - File Maintenance - Staff - Professional - Role**:
 - **Practice Manager.**
 - **Senior Partner.**

To add additional **Privacy Officer(s)** to this group:

1. Log on to **Vision 3** as a system administrator.



2. Select **Management Tools – Control Panel** and then **File Maintenance**.



3. Select **Staff Groups**.

4. Select **Expand**  to expand the **System folder** .

5. Right click on the **\$Privacyofficer** group and select **Add Staff Member(s)**:
6. From the **Staff Member – Add** list, highlight your **Privacy Officer(s)** and select **OK**.



Training Tip – To select multiple staff members, press the CTRL key and highlight each staff member.

Please note:

- If you try to remove all members of the Privacy Officer group the warning 'This group must contain at least one user' displays.
- You should carefully consider who the designated Privacy officer(s) are, therefore the Add All option is unavailable when you right click on the \$Privacyofficer group.

Out of Area Patients

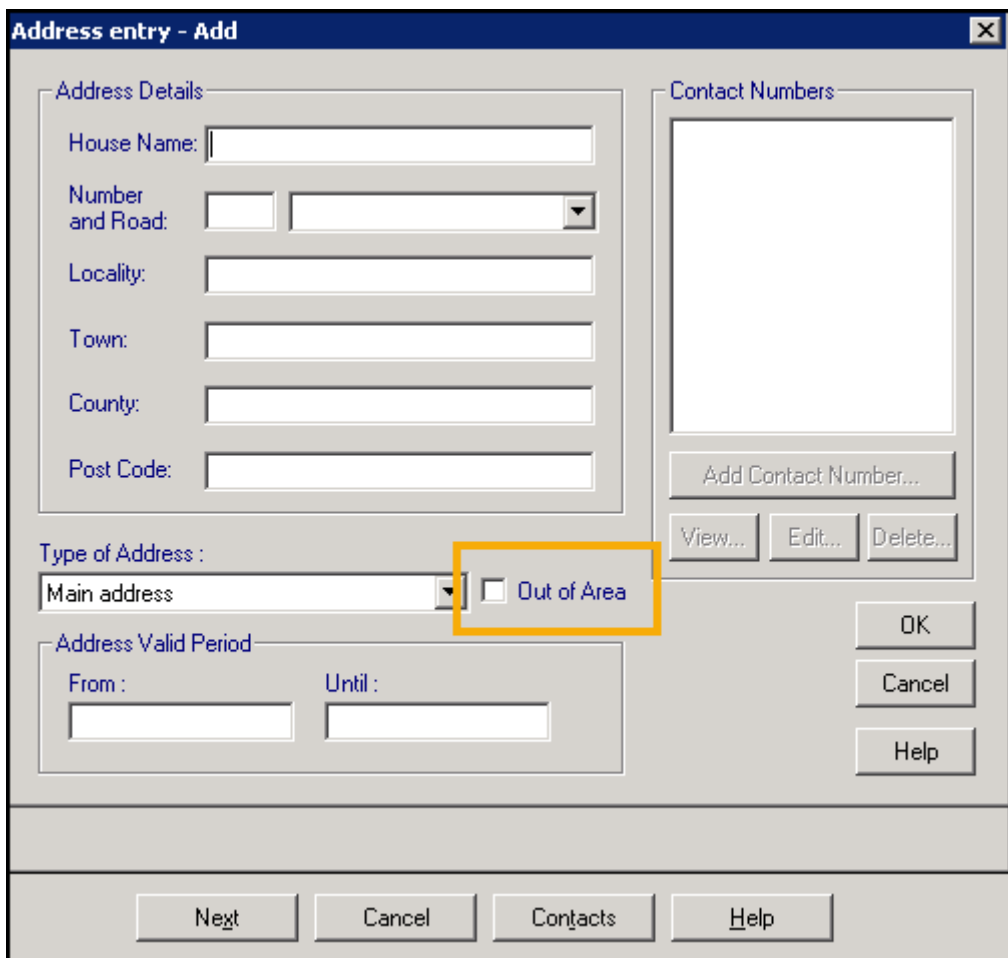
From **Vision 3** release DLM 800, you can record that a registered patient resides outside of your catchment area.

Recording Out of Area Patients

To record that a patient resides outside of your catchment area:

New Patients

If you are happy to accept a patient from outside of your catchment area, during the registration process, from the **Address entry - Add** screen, tick **Out of Area**:

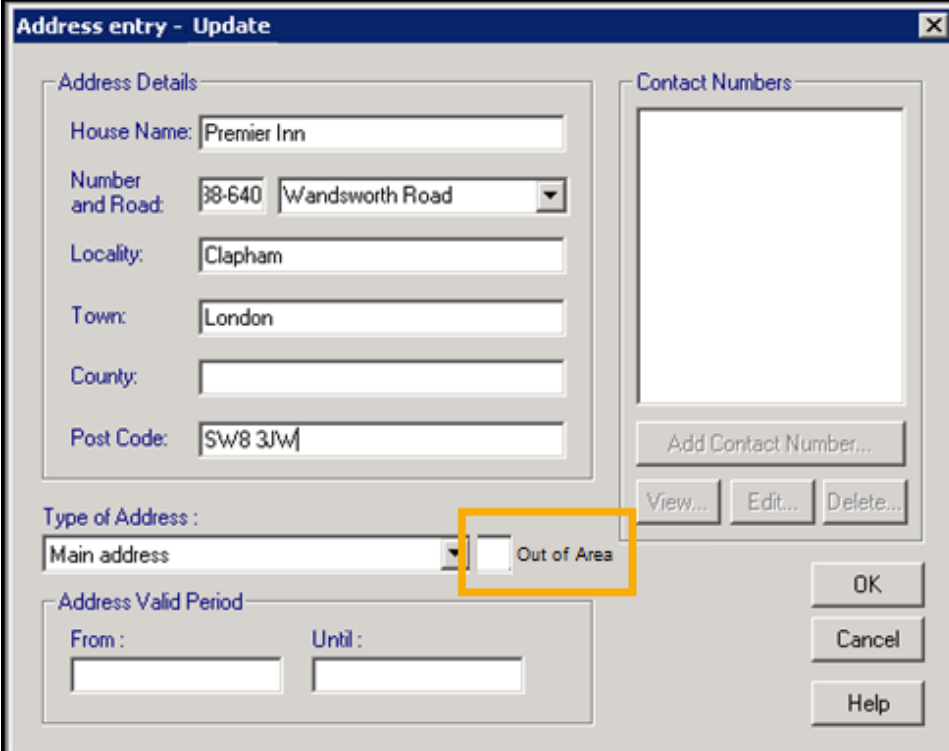


The screenshot shows the 'Address entry - Add' dialog box. It is divided into two main sections: 'Address Details' and 'Contact Numbers'. The 'Address Details' section contains several text input fields: 'House Name', 'Number and Road', 'Locality', 'Town', 'County', and 'Post Code'. Below these is a 'Type of Address' dropdown menu set to 'Main address'. To the right of this dropdown is a checkbox labeled 'Out of Area', which is highlighted with a yellow box. Below the 'Type of Address' section is an 'Address Valid Period' section with 'From' and 'Until' date input fields. The 'Contact Numbers' section is empty and contains buttons for 'Add Contact Number...', 'View...', 'Edit...', and 'Delete...'. At the bottom right of the dialog are 'OK', 'Cancel', and 'Help' buttons. At the bottom of the entire window are 'Next', 'Cancel', 'Contacts', and 'Help' buttons.

Existing Patients

You can record a patient resides outside of your catchment area on an ad-hoc basis or, if they move, when you update their address:

1. From **Registration**, select the patient in the usual way.
2. Select the **Address** tab.
3. Select **Edit** and the **Address entry - Update** screen displays:

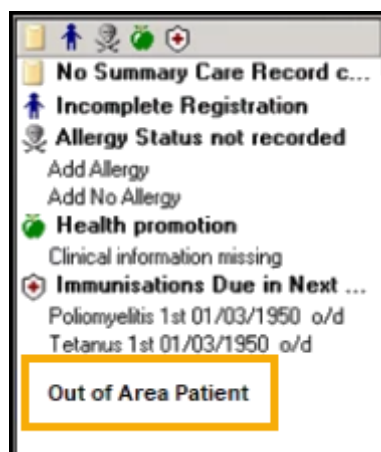


The screenshot shows the 'Address entry - Update' dialog box. It contains several input fields for address details: House Name (Premier Inn), Number and Road (38-640 Wandsworth Road), Locality (Clapham), Town (London), County, and Post Code (SW8 3JW). There is also a 'Type of Address' dropdown menu set to 'Main address' and an 'Out of Area' checkbox, which is highlighted with a yellow box. Below these are fields for 'Address Valid Period' (From and Until). On the right side, there is a 'Contact Numbers' section with an 'Add Contact Number...' button and 'View...', 'Edit...', and 'Delete...' buttons. At the bottom right are 'OK', 'Cancel', and 'Help' buttons.

4. Update the address details if required and tick **Out of Area**.
5. Select **OK**.
6. Select **OK** again.


Patient Alert

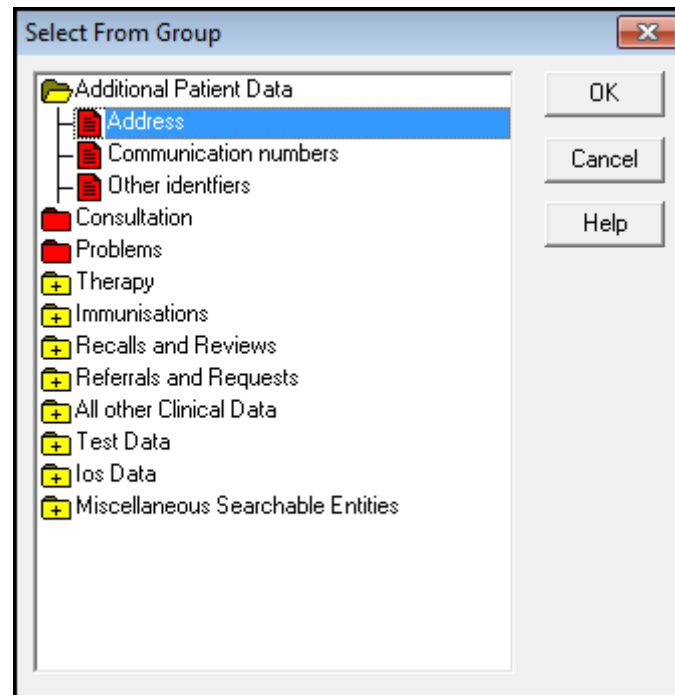
If a patient is marked as residing outside of your catchment area, this is highlighted as an alert within the **Consultation Manager Patient Alert** pane:



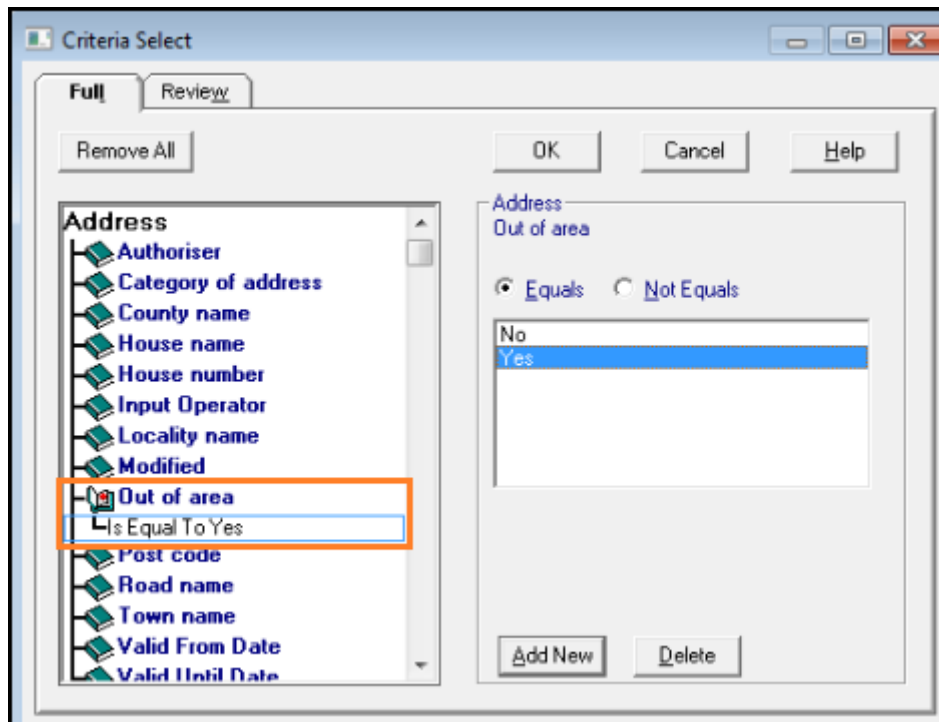
Searching for Out of Area Patients

Patients that are marked as residing outside of your catchment area can be identified from the new **Out of area** criteria within **Search and Reports**:

1. From **Search and Reports**, select **Ad-hoc Search**  and the **Search:New Search** screen displays.
2. Select **Add Entity** and the **Select from Group** list displays.
3. Select **Additional Patient Data - Address**:



4. Select **OK**.
5. Highlight **Address** and select **Selections**.
6. From **Criteria Select**, select **Out of area**.
7. From the right-hand side select **Equals - Yes**:



8. Select **OK**.
9. Select **Run**.