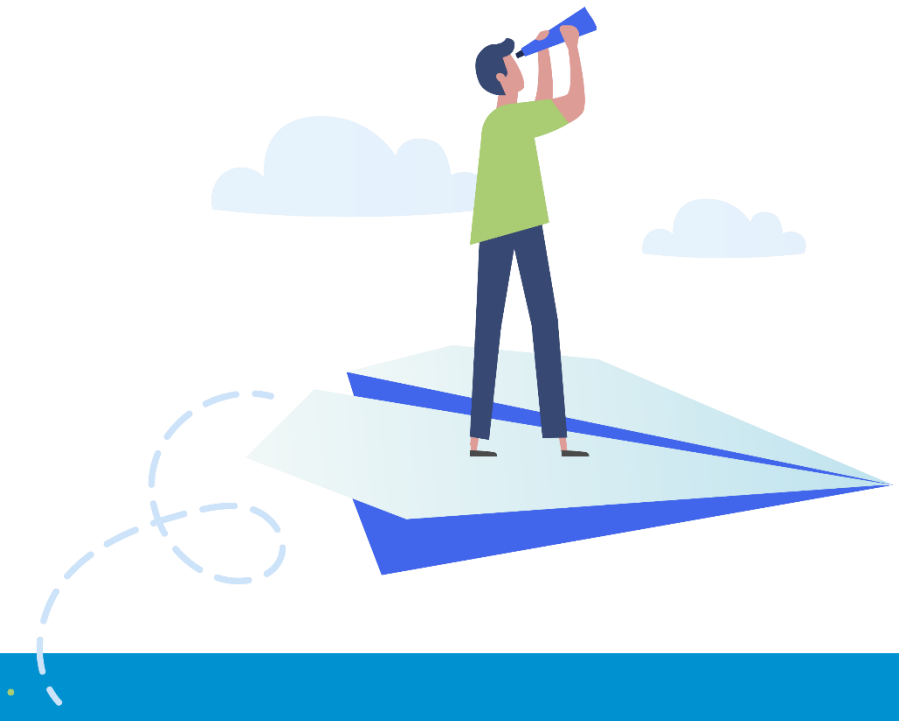
Vision 3 Release Guide DLM 800

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.

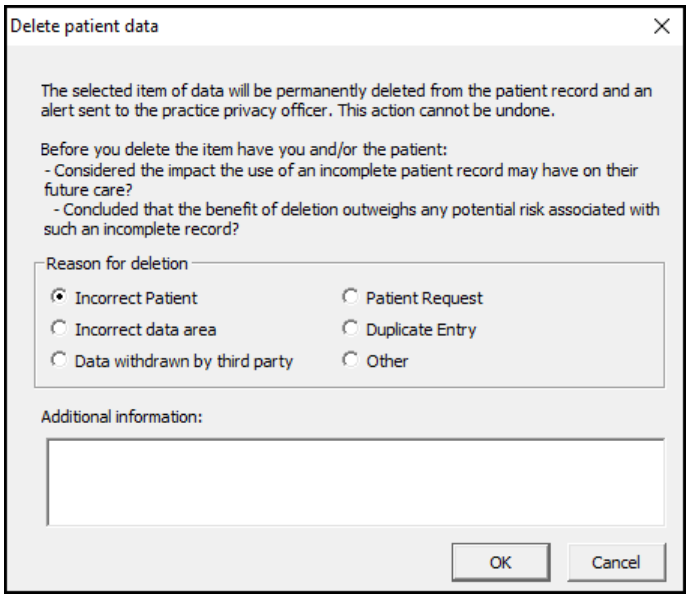
> **Training Tip** - You can display NHS Prescribing Price Information from **Pack Information** and from **Packs** in the bottom half of the **Select Drug** screen.

- **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.

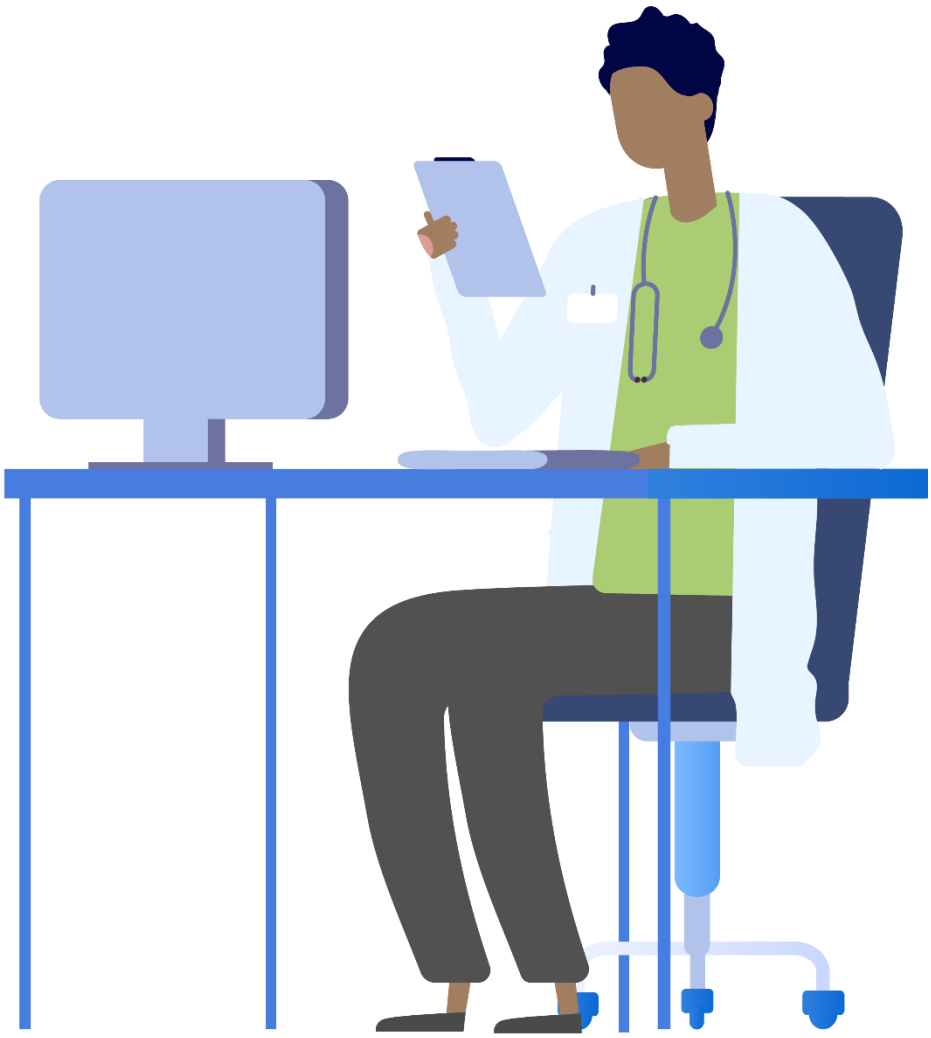
- **Deleting Clinical Data** - You can no longer delete a **Consultation** with entries in it. To delete an entire consultation, each entry within it must be deleted individually before deleting the empty **Consultation**. If you select to delete clinical data, the **Delete patient Data** screen now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



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

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.

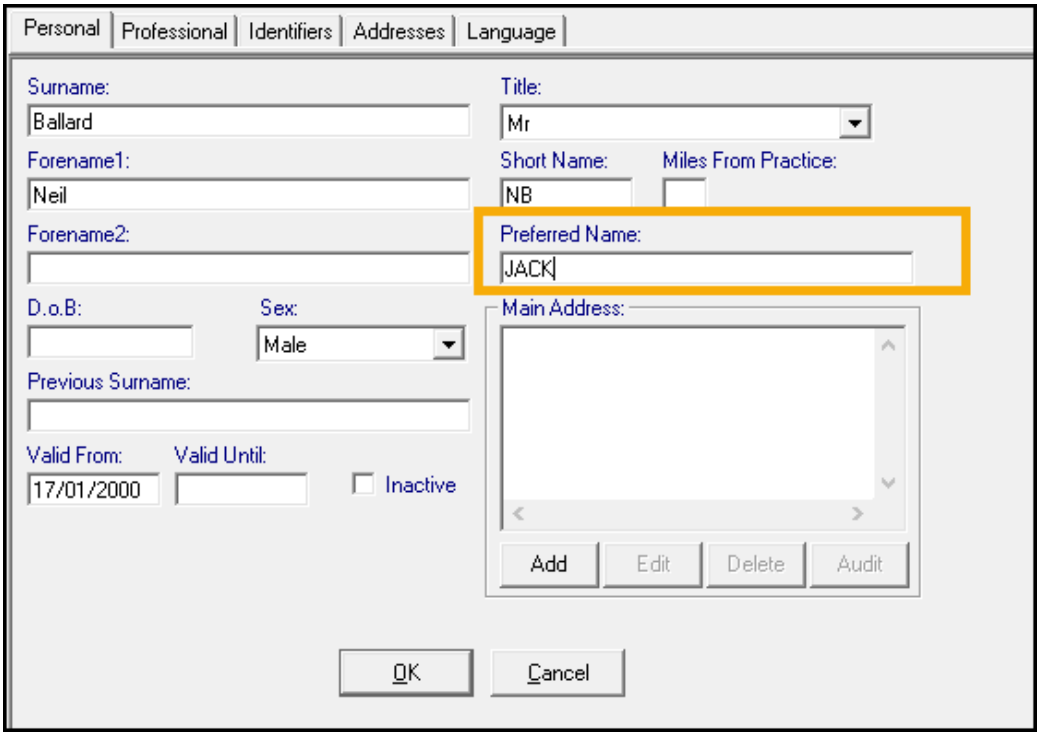
  The information provided is:

  - 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:



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

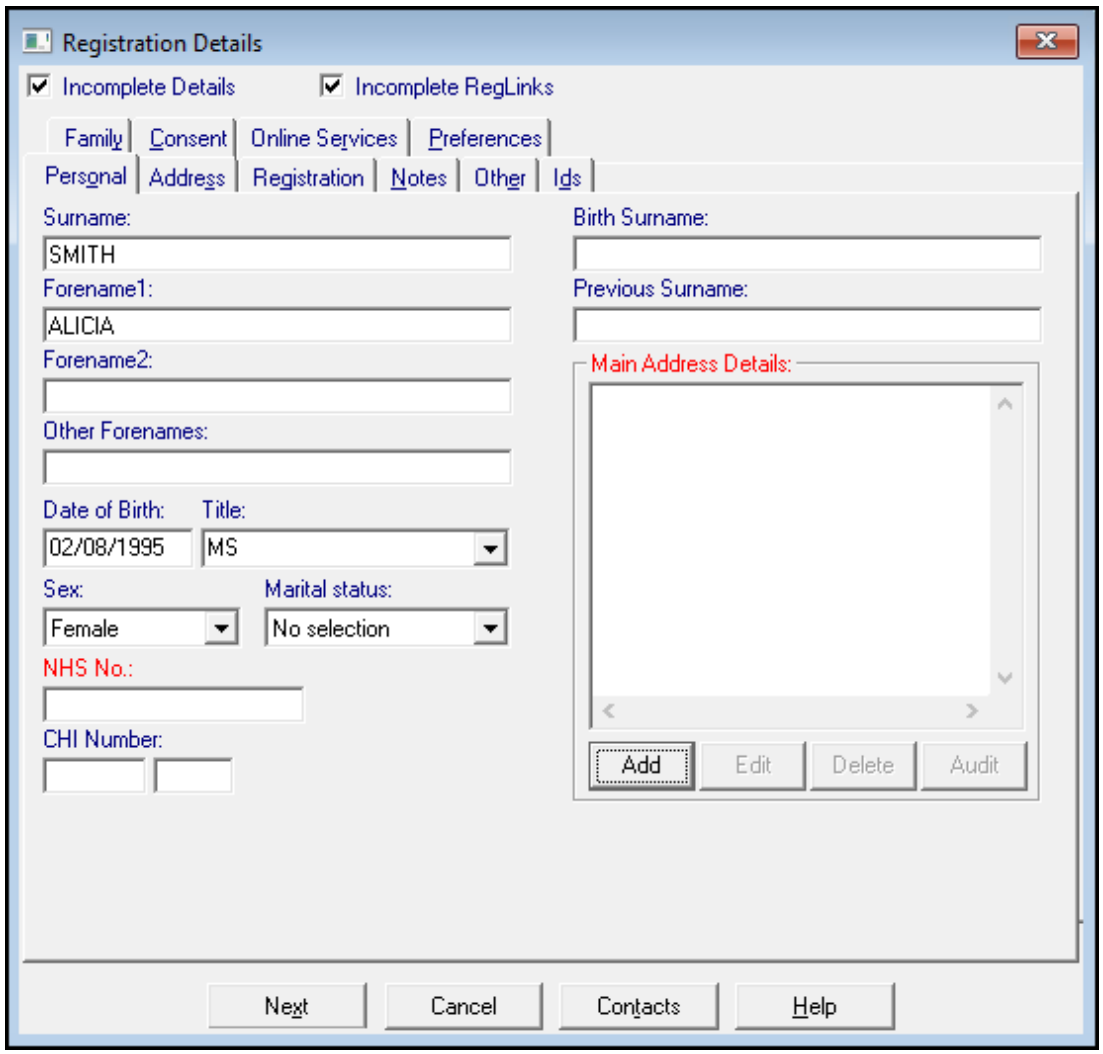
> **Note** - This does not currently display elsewhere.

- **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

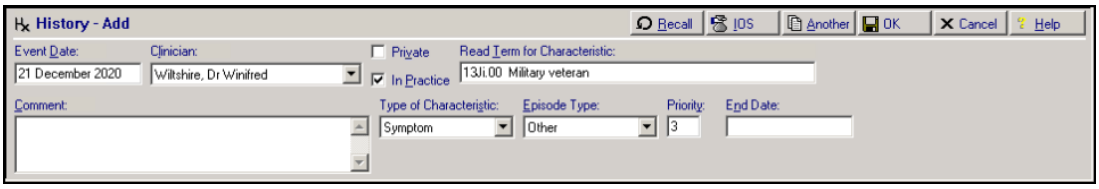
Vision 3 release **DLM 800** contains the following new features and improvements for **Registration**:

- **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.

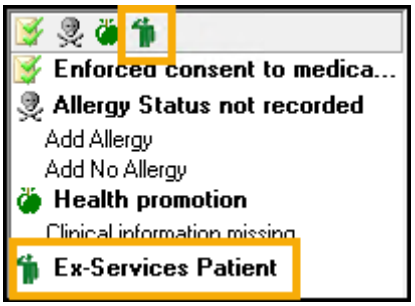
- **Ex-services Patients** - Within the **Preferences** tab, there is now an **Ex-services** option. To record service details, select **Ex-services** and complete the **History - Add** screen as required, the clinical term defaults **13Ji.00 Military veteran**:



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.

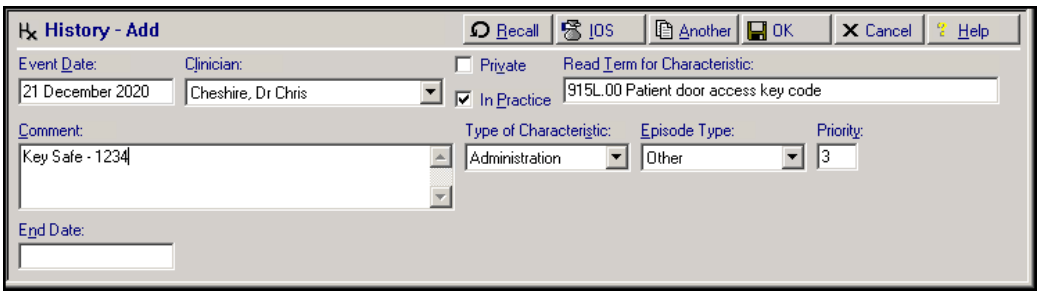
The selected term displays alongside the **Ex-services** option in the patient's **Registration** and displays in the **Alert pane** in the patient's clinical record:



- **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.

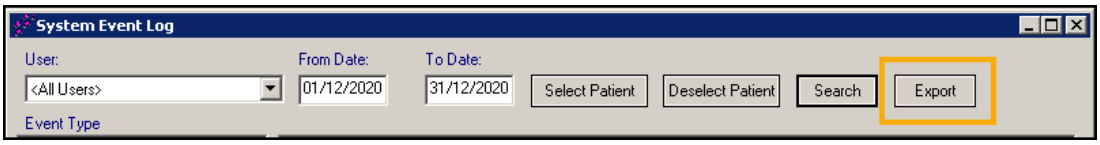
- **Out of Area** - You can now record that a patient, either new or existing, is residing outside of your catchment area. You can also now search for patients that are marked as **Out of Area**.

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.

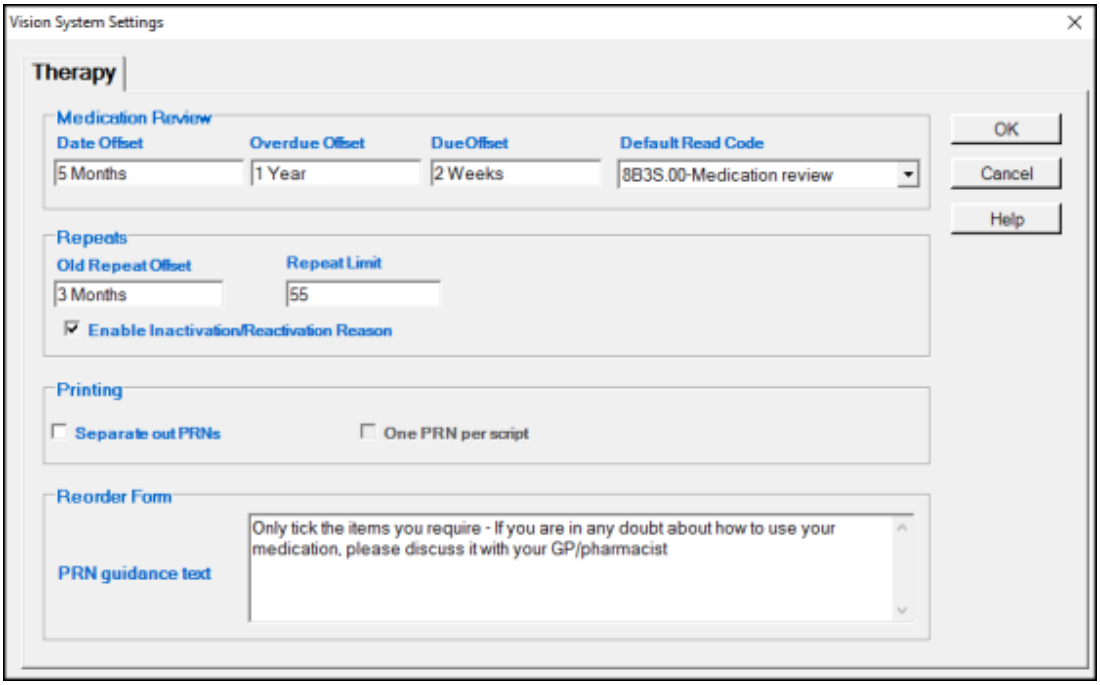
This can be set as a practice wide or a prescriber setting depending on your practice protocols:

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**:



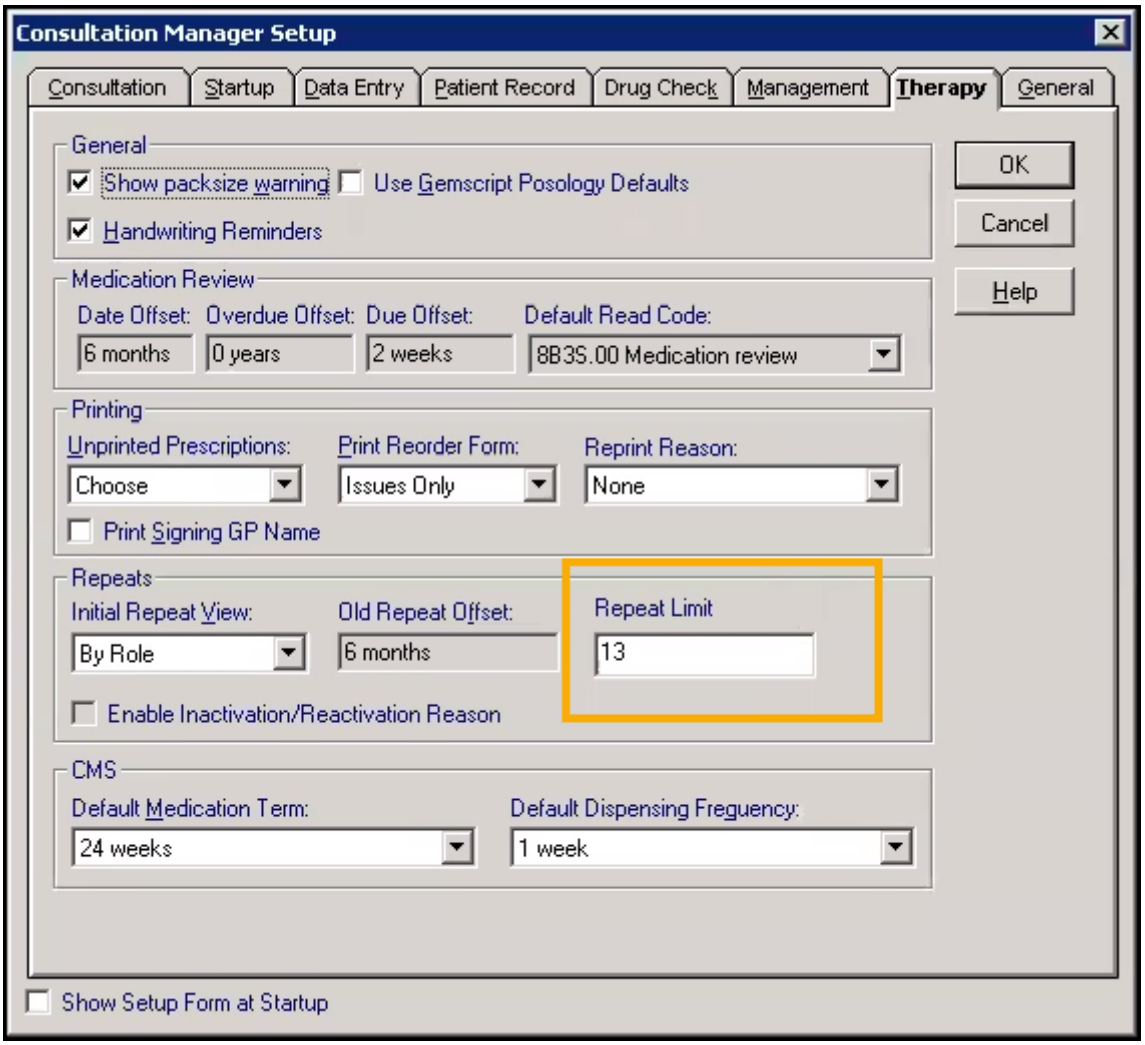
3. Enter the maximum number of repeats anyone in your practice can authorise in **Repeat Limit**. By default:
   - **England**, **Wales** and **Northern Ireland** - Defaults to **366**, update as required with a maximum of 999.
   - **Scotland** - Defaults to **99**, update as required with a maximum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

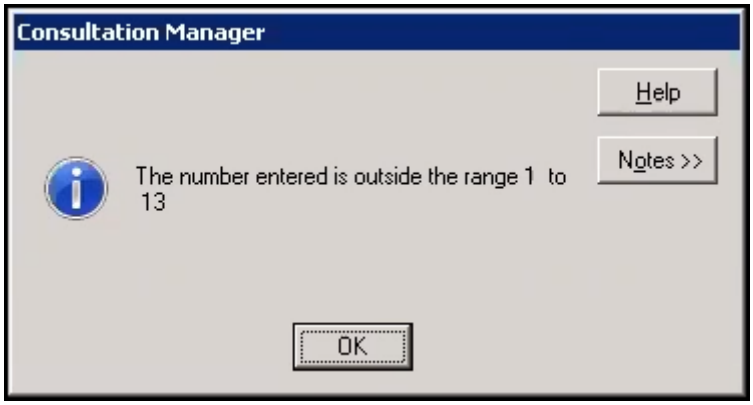
2. Select **Consultation - Options - Setup** and then the **Therapy** tab.
3. In **Repeat Limit**, enter the maximum number of repeats permitted, this defaults to the practice wide limit:



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:



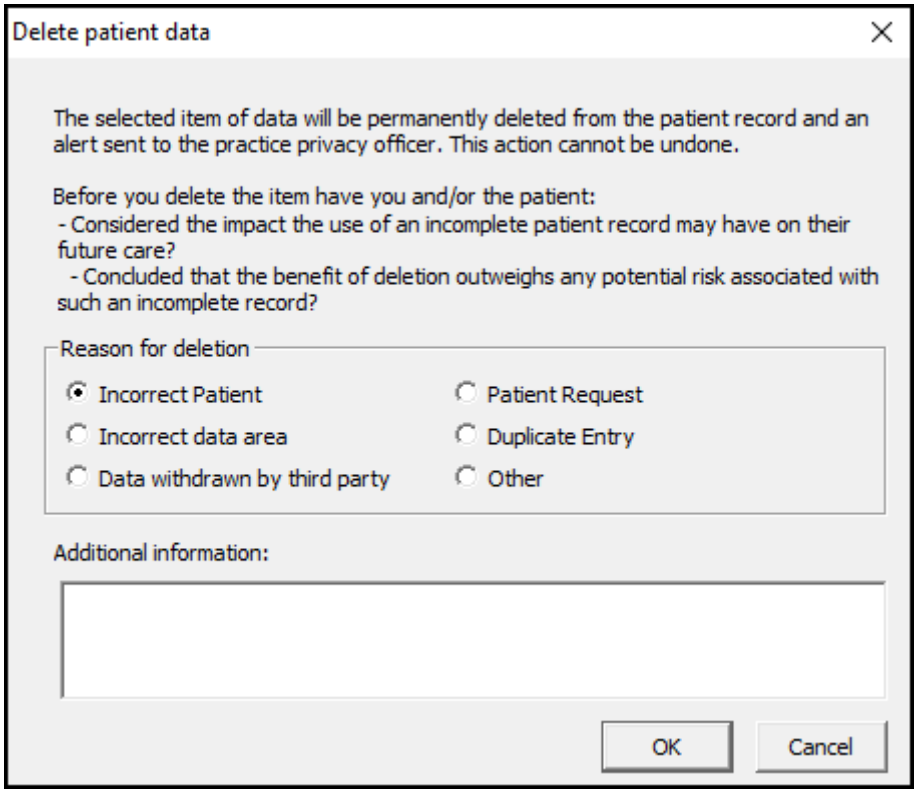
Select **OK** and reduce the number of Repeats in the master.

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:



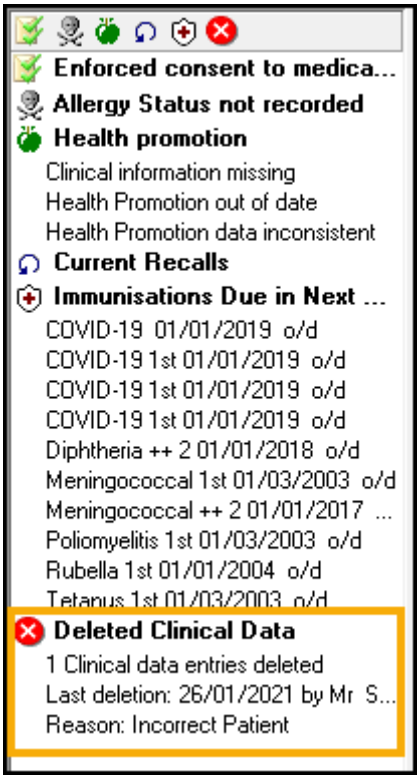
5. Select the appropriate **Reason for deletion** and enter any **Additional information** if required.
6. Select **OK** to save.

> **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**:

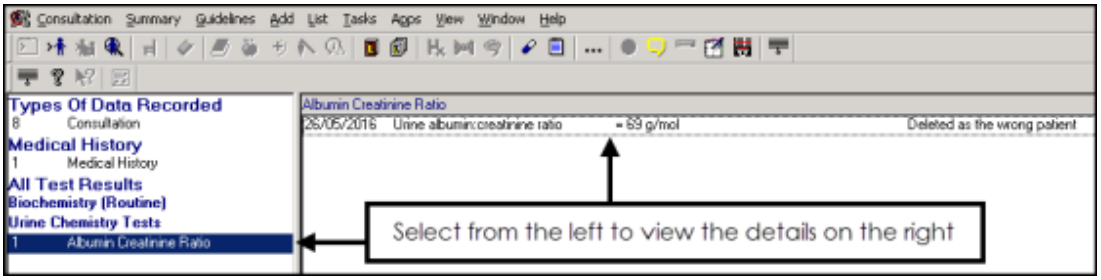


To view deleted records for a patient:

> **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**.

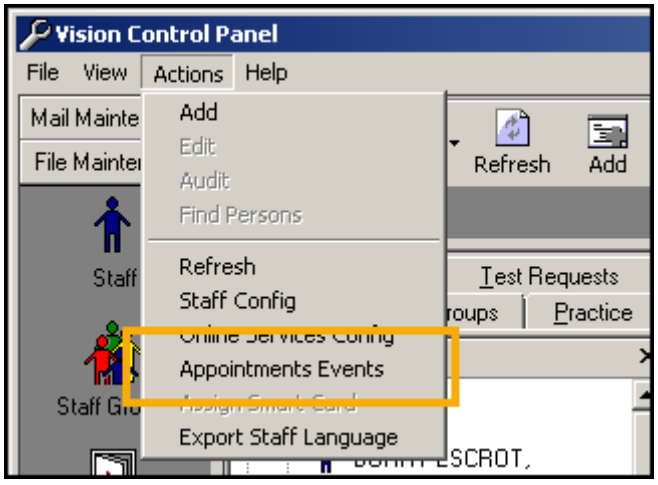
From DLM 800, if you have migrated to our fabulous easy to use app, **Appointments Setup**, for maintaining your appointment books, **Events** are set up and maintained from **Control Panel**.

Ad-hoc Events

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

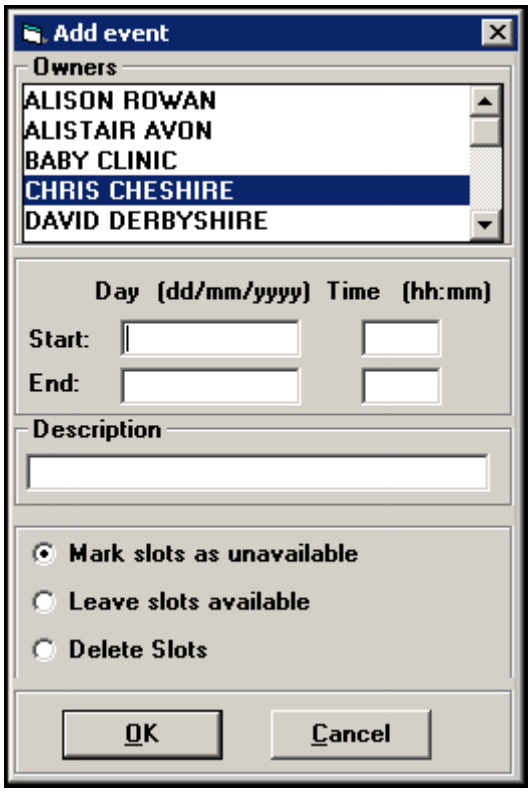
To set up an ad-hoc **Event**, for example, annual leave, study leave and meetings:

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.

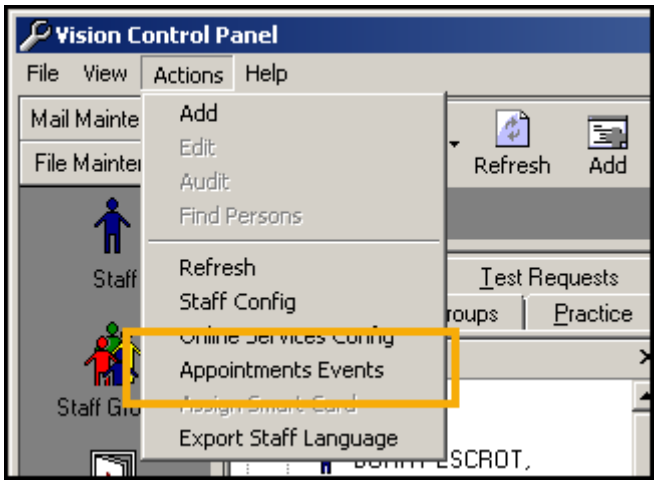
- **Mark slots as unavailable** - Select to block out any slots in the time frame of the event.
- **Leave slots available** - Select to leave slots in the time frame of the event available, for example, if you are planning to cover with a locum.
- **Delete Slots** - Select to remove any slots in the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

5. Select **OK** to save.
6. Select **Close**.

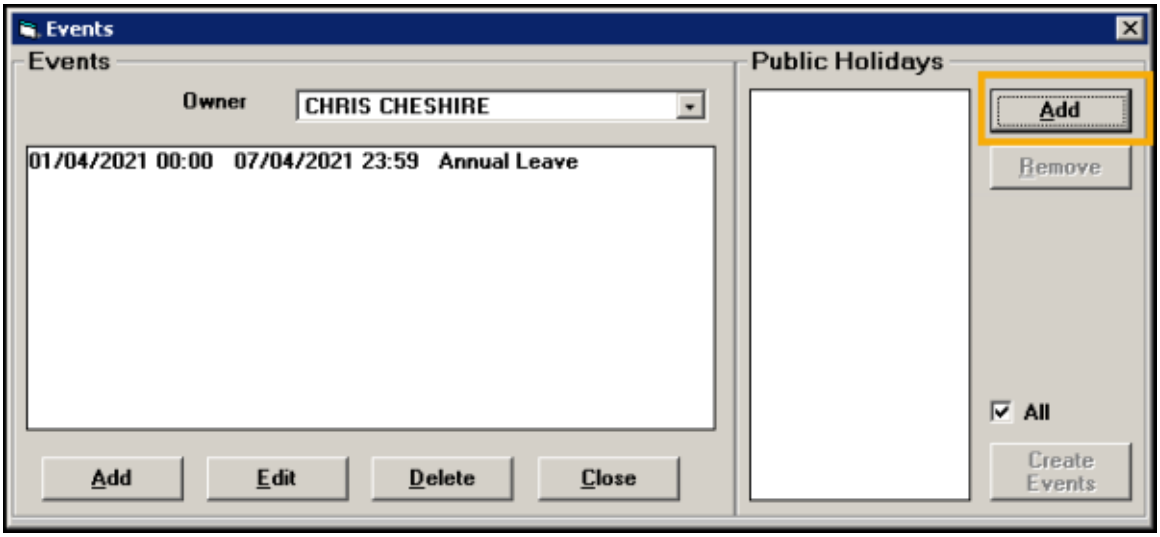
Public Holidays

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

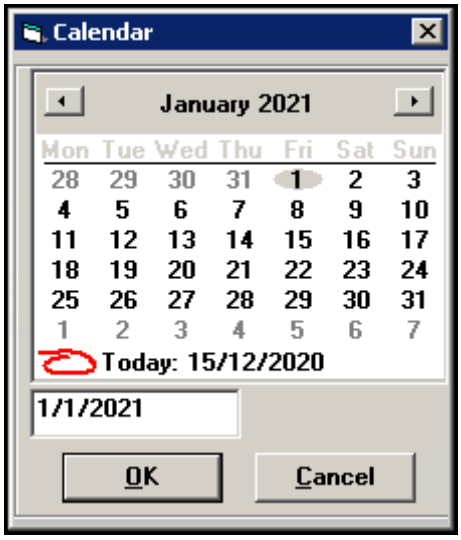
1. From the **Vision 3** front screen, select **Management Tools** - **Control Panel** - **Actions** - **Appointments Events**:



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

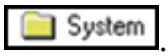
A **Privacy Officer** group is automatically created in **Control Panel**. The **Privacy Officer** group cannot be empty and must contain at least one member of staff:

- 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

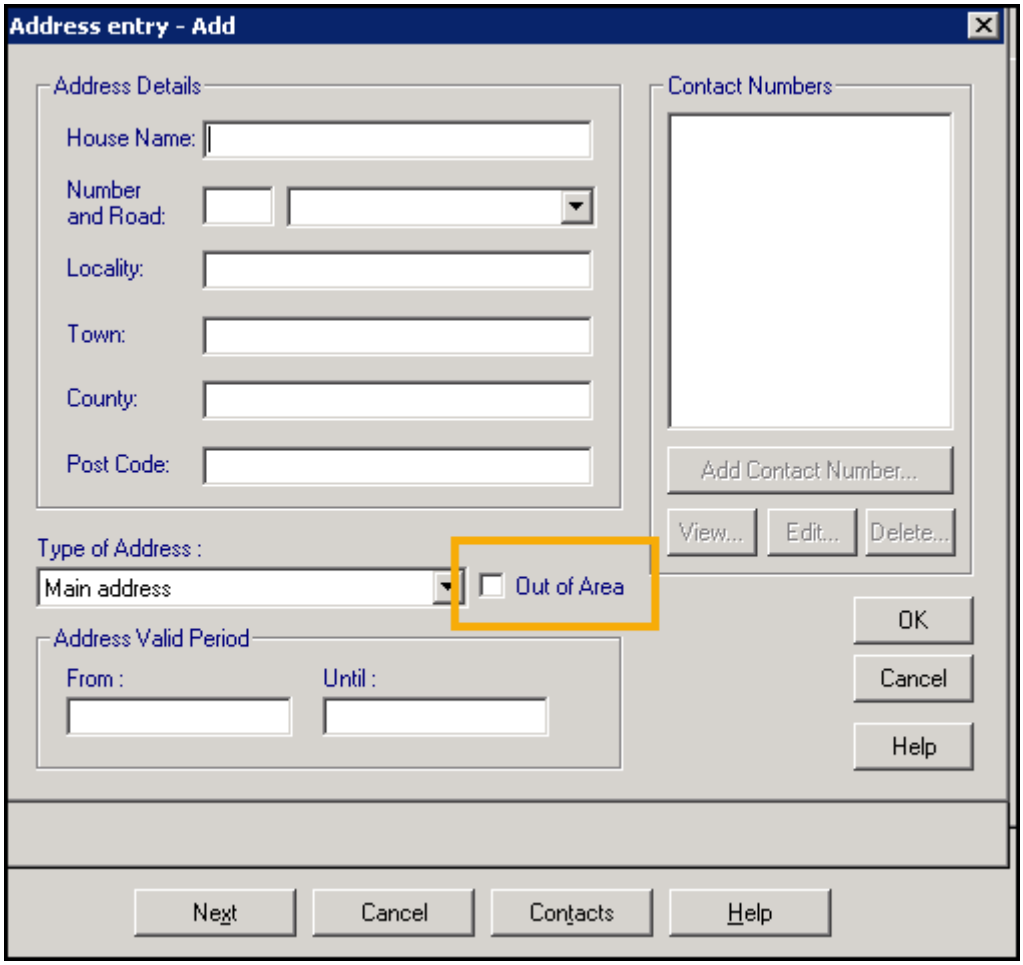
From **Vision 3** release DLM 800, you can record that a registered patient resides outside of your catchment area.

Recording Out of Area Patients

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

New Patients

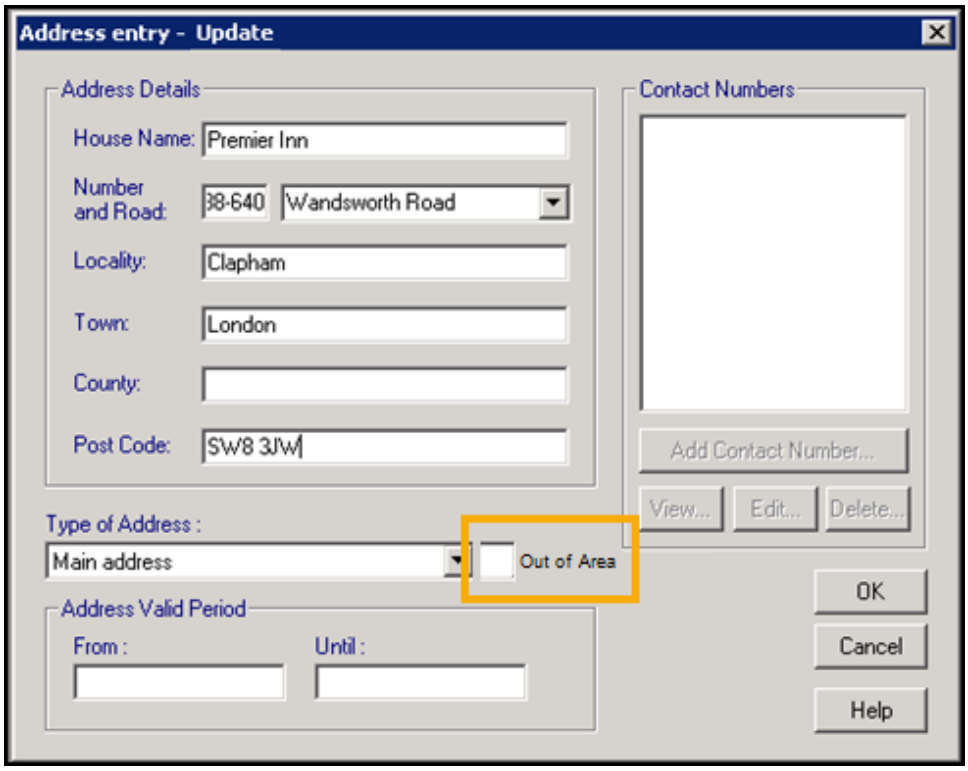
If you are happy to accept a patient from outside of your catchment area, during the registration process, from the **Address entry - Add** screen, tick **Out of Area**:



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:

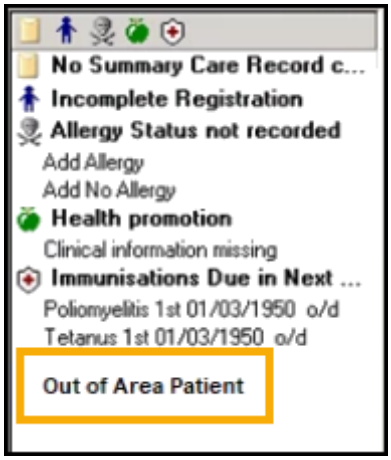
1. From **Registration**, select the patient in the usual way.
2. Select the **Address** tab.
3. Select **Edit** and the **Address entry - Update** screen displays:



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

Patient Alert

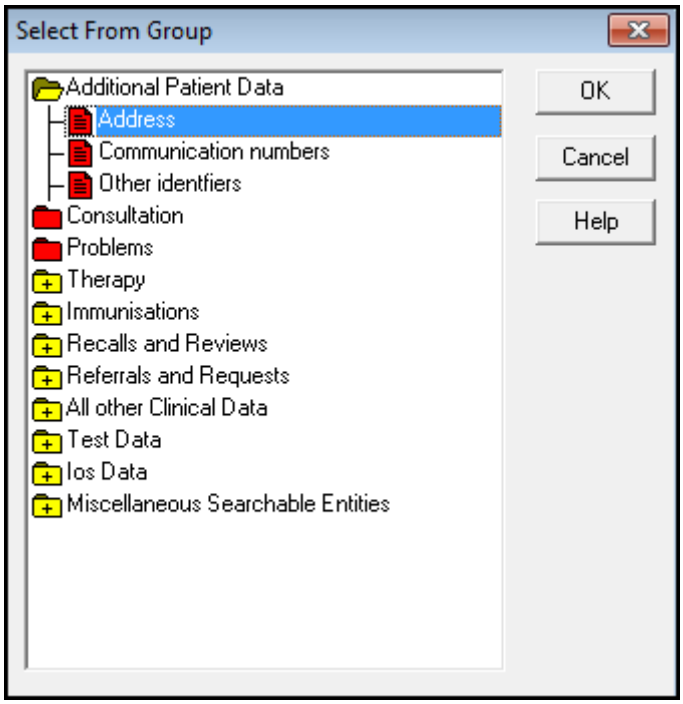
If a patient is marked as residing outside of your catchment area, this is highlighted as an alert within the **Consultation Manager Patient Alert** pane:



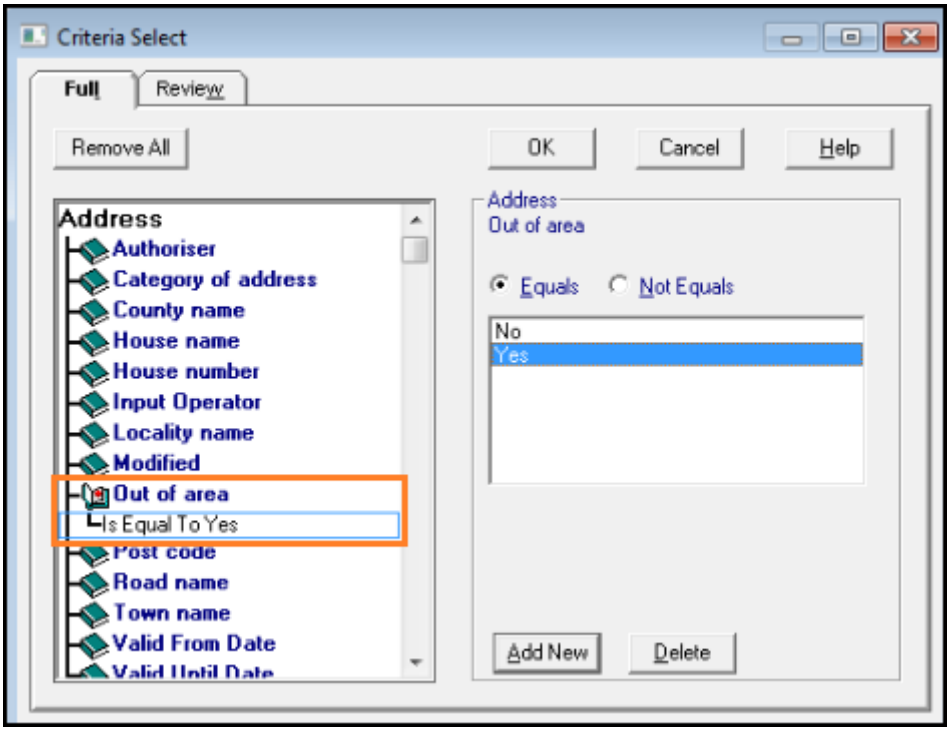
Searching for Out of Area Patients

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**.