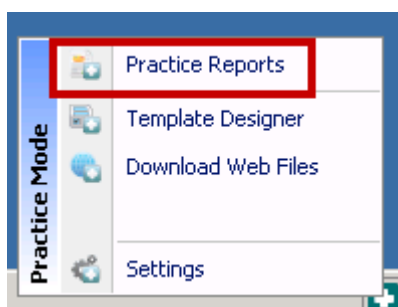



Vision+ Recalls

Vision+ has a comprehensive recall management program, this user guide explains how to setup and maintain a recall and reminder system.

1. Login to Vision. From the Windows Notification Area, right click on the Vision+ Icon  and select **Practice Reports**.



Accessing Vision+ Practice Reports

 **Note** - You must ensure you do not have a patient selected in Consultation Manager. If you do, the Patient Select menu is displayed.

2. Choose the clinical category from **Practice Reports**.

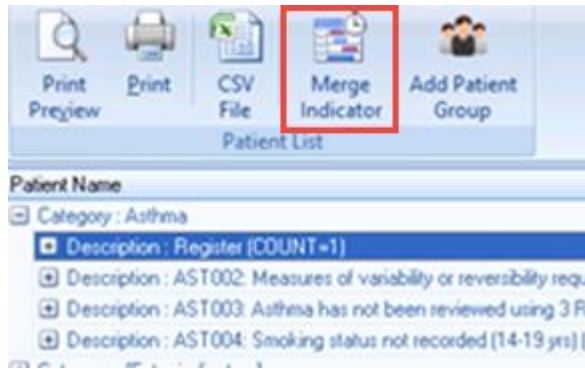
QOF Version 30 [Scotland]

All		
Asthma	Atrial fibrillation	Blood pressure
Cancer	Cardiovascular disease primary prevention	Cervical screening
Chronic kidney disease	Chronic obstructive pulmonary disease	Contraception
Coronary heart disease	Dementia	Depression
Diabetes mellitus	Epilepsy	Heart failure
Hypertension	Hypothyroidism	Learning disabilities
Mental health problems	Obesity	Osteoporosis
Palliative care	Peripheral arterial disease	Rheumatoid arthritis
Smoking	Stroke and transient ischaemic attacks	Medicines management indicators

Selecting the QOF Category

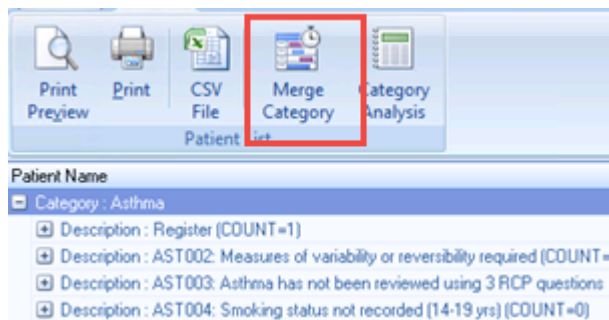
3. You can send a recall letter to the following:

- **Merge Indicator** - This finds patients with outstanding indicators eg blood pressure missing. Highlight the indicator line and select the Merge Indicator option.




Merge Indicator

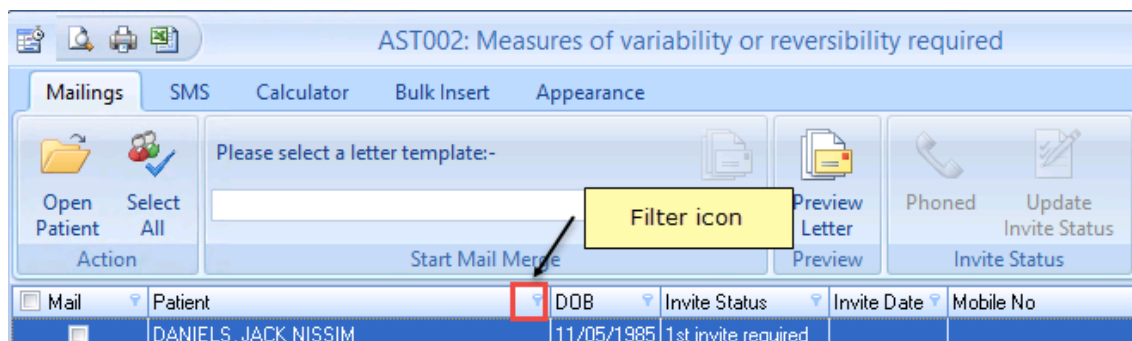
- **Merge Category** - This finds all patients in a category eg All Hypertensives. Highlight the category and choose the Merge Category option.







Merge Category

Generating Merged Letter

1. After merging your indicator or category line, the patient information for the selected indicator or category is displayed in Practice Reports.
2. To filter patients click the filter  icon in the column heading.

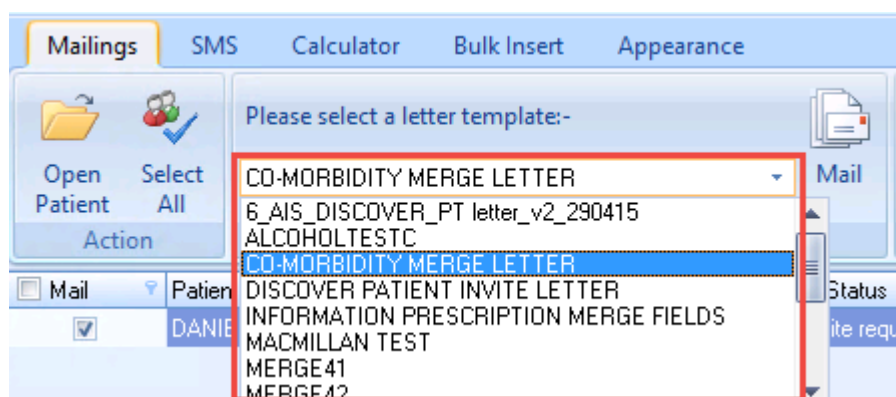


Viewing Patient Information

 **Note** - If you filter a column, this is shown at the base of the screen  (Invite Status = 1st invite required) . To remove the filter, click on the  icon.

3. Tick the box against those patients you want to recall or **Select All**.
4. Choose the recall template letter you require from the drop down list.

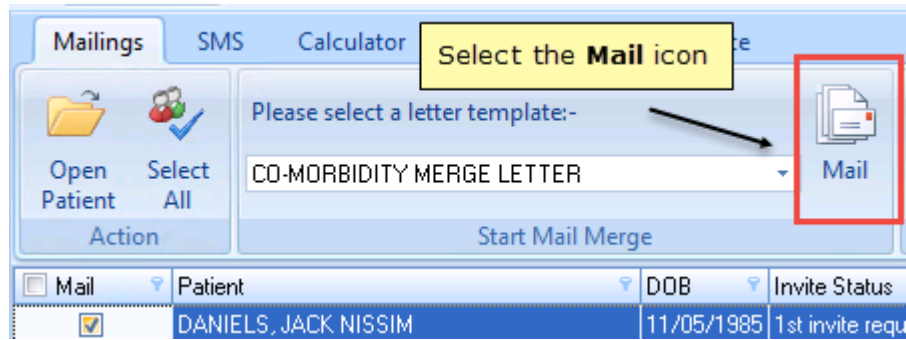
 **Note** - Recall Letter Templates are created using the Templates option in Practice Reports. See *Recall Templates* <http://www.inpshep.co.uk/DLM480/Visionplus/index.htm#46474>.



Merging Patients

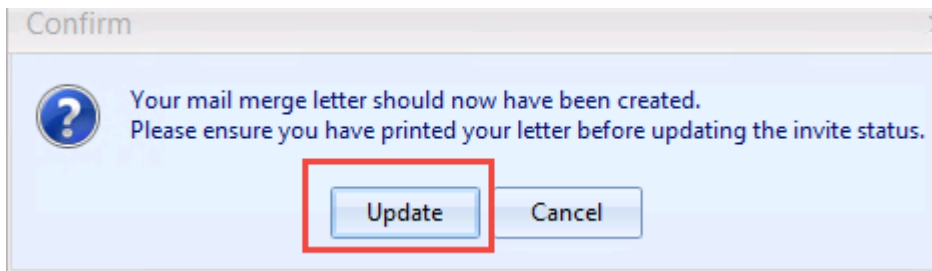
5. Click **Preview Letter** to view the format of the letter before printing a batch.

6. Click **Mail** on the Toolbar.



Mail Option

7. The recall letters open in a single Word document, ready to be printed, each letter is held in a single page within one document.
8. After printing the document you are prompted to confirm if the letters have printed successfully. If you are happy with the format of the letter and to update the invite status, click **Update**.



Letter Confirmation

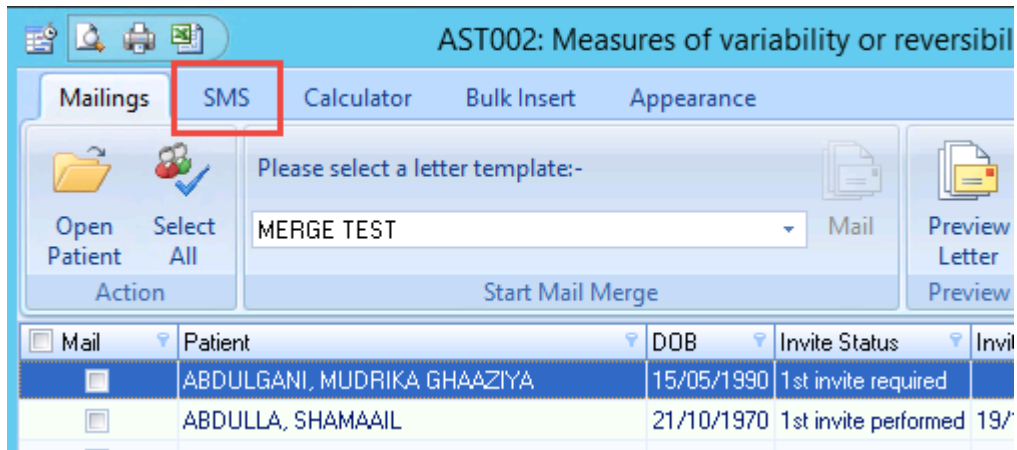
9. If you click **Update** to confirm the letters have printed correctly, the invite status automatically updates and a Read code is added as a history entry to the patient's journal. The following statuses apply:
- 1st, 2nd or 3rd Invite Performed

Recalling Patients by SMS Text Messaging

You can also recall patients via an SMS Text Message Reminder.

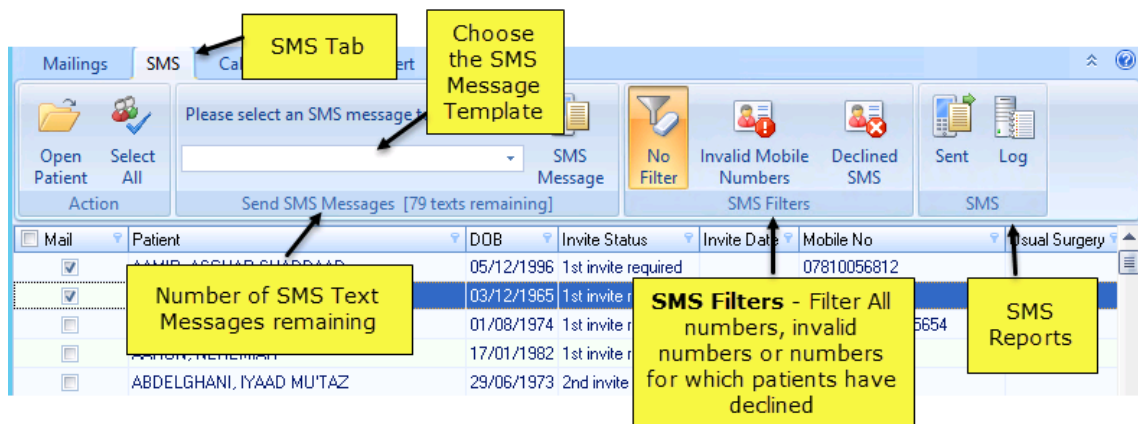
In Practice Reports after selecting Merge Indicator or Merge Category, the Mailings screen displays:

1. Click **SMS**.



Practice Reports - Mailing Screen

2. The SMS menu is displayed, from here you can choose the SMS message template which you must do before a message can be sent. For more information on SMS Text Message Recalls see - [SMS Text Message Reminders](http://www.inpshelp.co.uk/dlm483/Visionplus/index.htm#64937) <http://www.inpshelp.co.uk/dlm483/Visionplus/index.htm#64937>



SMS Merge Screen

Managing your Recalls using Letter Status

The Invite Status column on the Merge screen plays an important part in managing your recall letters as it gives a clear indication of which letter should be sent to each patient.



Initially, the Invite Status column displays a **1st Invite Required** status, indicating that this patient should be invited to attend for review. After the initial invitation letter is sent to the patient, the status changes to **1st Invite Performed**. After the mandatory 28 day interval has elapsed, the status changes to **2nd Invite Required** indicating the second invite is required. After the second invitation letter is generated, the status changes to **2nd Invite Performed**, and so on to the **3rd Invite Required** and **3rd Invite Performed** status. If the patient still does not attend after the final 28 day interval has passed, the status is changed to **Did Not Attend**. At this point, you might want to consider exception coding these patients. These exception codes are typically expiring ones and only apply for 12/15 months contract year. On April 1st each year the invite status reverts back to **1st Invite Required** regardless of any letter sent previously.



Note - If a patient appears with a status of three dots (...), it means they have been seen for a review and a review code has been entered in their journal but the QOF indicator was not completed (see *Entering Additional Codes* <http://www.inshelp.co.uk/DLM480/Visionplus/index.htm#46357>). You need to check when the patient was last seen by selecting the option to **Open Patient Record**, see *Opening a Patients notes from the Patient List* <http://www.inshelp.co.uk/DLM480/Visionplus/index.htm#46472>. If the patient is subsequently sent a letter a Read code will be recorded in their record but the invite status remains as three dots and will not change to 1st letter performed etc because according to the patient's journal they have a Read code entry indicating that they have had their review.


Viewing the letter in Consultation Manager

The invite letter is Read coded in the patient's journal along with the letter which is stored as an attachment in the patient's record.

Date	Description
28/06/15	 Clinical Letter Asthma monitor 1st letter  Asthma monitor 1st letter CO-MORBIDITY MERGE LETTER.doc

Journal Entry

Invite by Phone

To record a verbal invite by phone choose **Phoned**  from the Toolbar and confirm that you have made a verbal invite to the patient. An appropriate "verbal" Read code is recorded in the patient(s) journal.



Note - The Read codes are Administration codes.

Using the Update Invite Status

This option allows you to update the invite status manually, which is useful if starting a recall programme part way through a QOF year.

1. Using your normal recall programme, find the patients who have already been invited.
2. View your patient list and select the patient(s).
3. Choose the option to **Update Invite Status**.

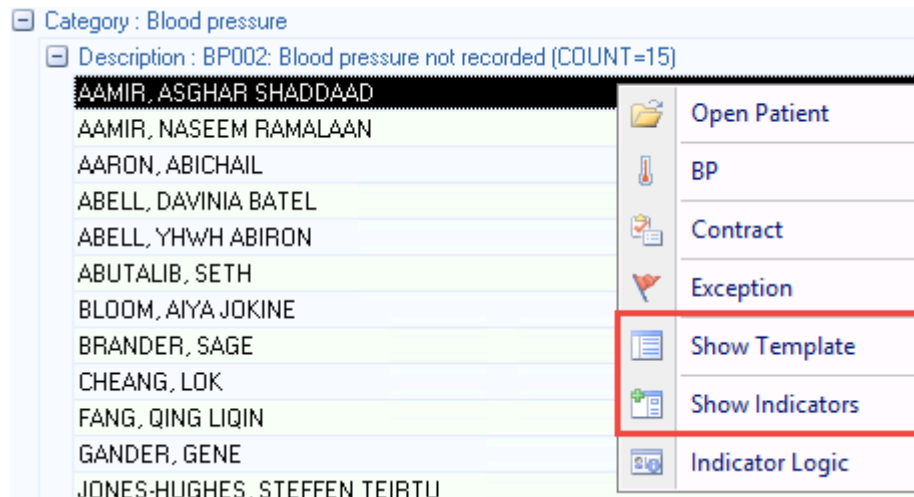


Update Invite Status

4. Enter the invite date and click **OK**. Where multiple letters have been sent, repeat this process.

Show Template or Show Indicator

When viewing your patient list you can right click on a patient's name and choose **Show Template** to launch the QOF Template or if you choose **Show Indicators** you can view the Alert Indicator popup screen for this patient.

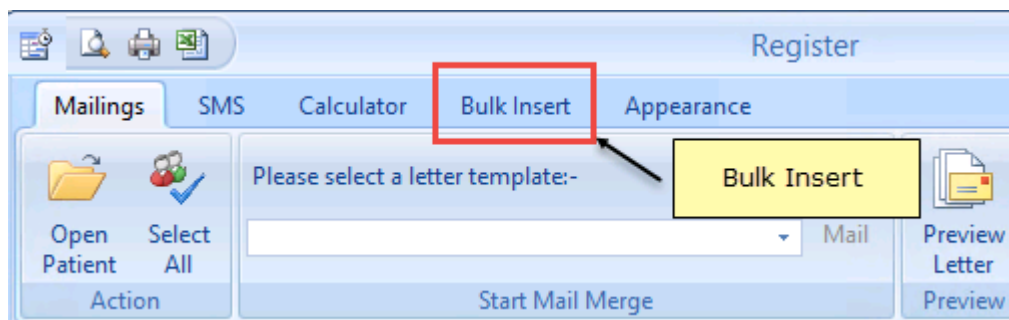


Show Template or Show Indicators

Adding Read Codes to Multiple Patient Records

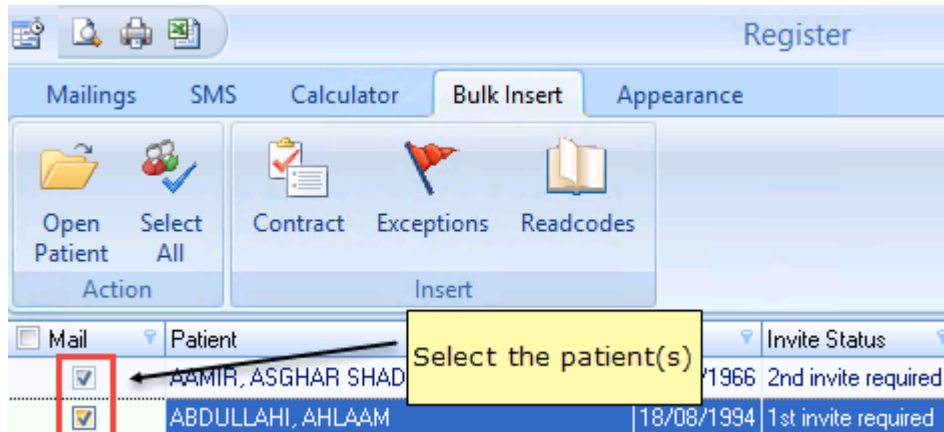
Within patient lists you can add multiple Read codes.

1. From the Mailing screen, select **Bulk Insert**.



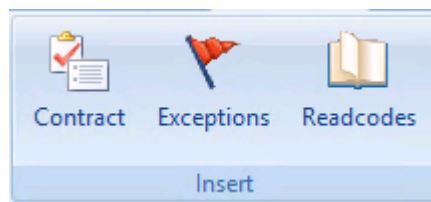
Bulk Insert

- Click the **Select All** option to include all patients in the list or tick individual patient(s).



Select Patient

- Choose one of the following options:



Bulk Insert

- **Contract** - This takes you to the Read Code Data Entry screen for the indicator or category selected. See [Contract](#) (page 9).
- **Exceptions** - You can choose an Exception code. See [Exception Code](#) (page 9).
- **Read Codes** - You can search for the Read codes to be entered in the patient's record. See [Bulk Add a Read Code](#) (page 9).

Contract

Click **Contract** to select the Read Code Data Entry screen for the patient list you are viewing. Select the appropriate Read codes. Click **OK** to save.


Exception Code

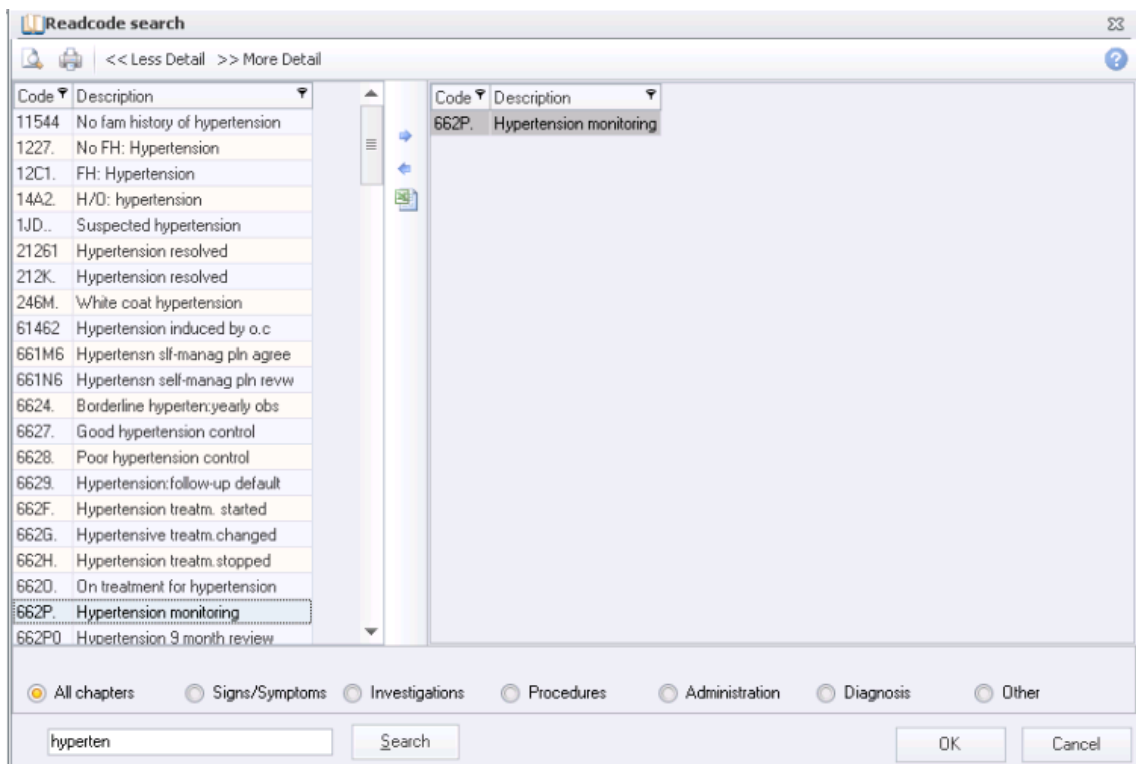
You can quickly enter exception codes for patients by filtering the invite status column

and after the 3rd invite select **Exceptions**  from the Toolbar. Select the Exception Read code and select **OK**.

Bulk Add a Read Code

- Select Read codes and enter a keyword in the search box or a Read code with a dot (.) rather than a #.
- A list of matching Read codes is displayed in the left hand column.

3. Highlight the one you want and click the arrow  which moves the Read code to the right hand side of the screen. You can repeat this process for multiple Read codes.

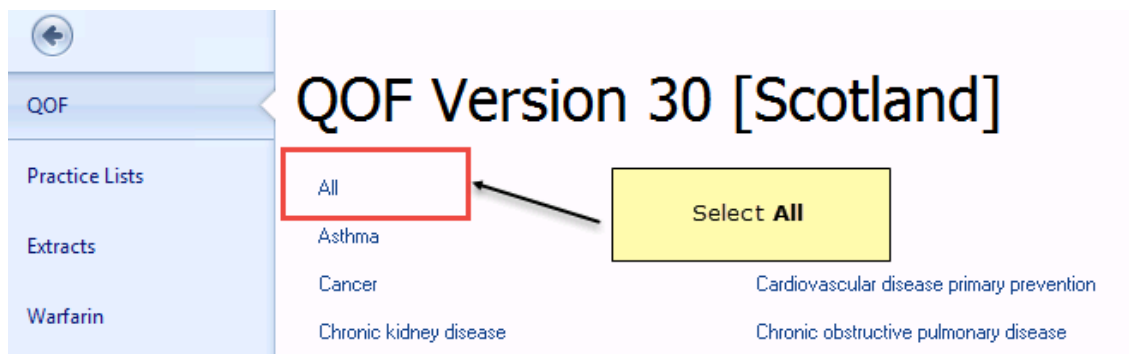


4. Once all the Read codes are selected, click **OK**.
5. The Read code Data Entry screen is displayed with the Read codes selected and the event date box ticked.
6. Click **OK** to add the Read Codes to the patient's record.

Co-Morbidity Recalls

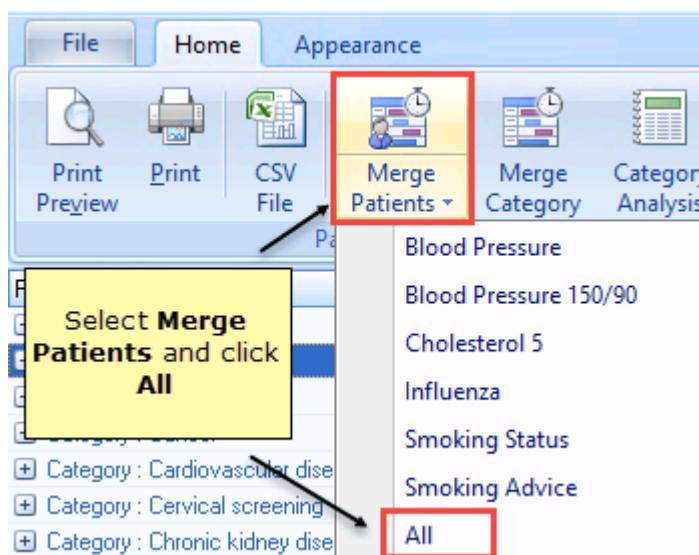
Vision+ offers the facility to identify co-morbidity cohorts and merge multiple registers using the **All** report.

1. From the Practice Report screen, select **All**.



All Report

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



Merging Co-Morbidity patients

3. All patients on any register are listed. Where a patient is on multiple registers, their name is only listed once.
4. You can view what register the patient is on by scrolling and looking for the column **Category List**.







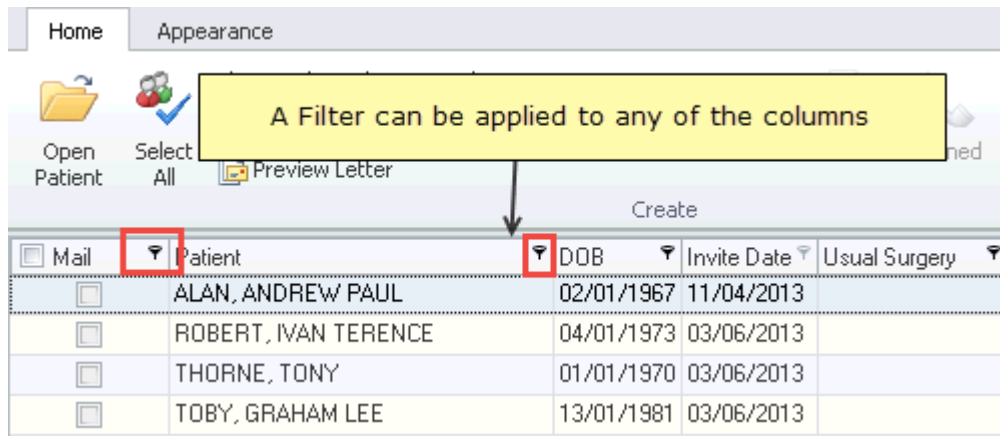
Training Tip - To move a column, drag and drop the column heading.

Category List
Medicines management;Records and information;Smoking;
Atrial fibrillation;Depression;Hypertension;Records and inform
Medicines management;Records and information;Smoking;
Atrial fibrillation;Cardiovascular disease primary prevention;Chi

Category List

5. You can also filter any of the columns eg Invite status.

 **Note** - To remove the filter click  alongside the filter  (Invite Date = 07/05/2013)  at the base of the screen.

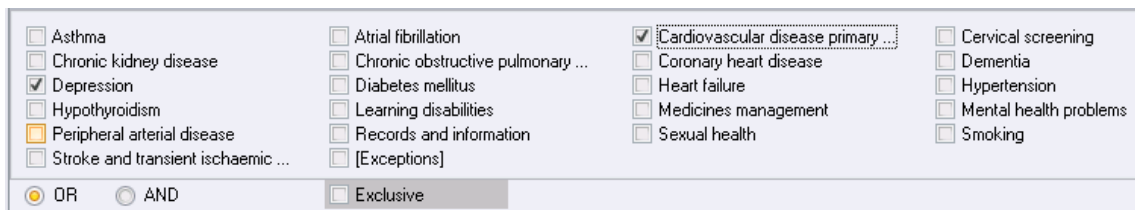


<input type="checkbox"/> Mail	<input type="filter"/> Patient	<input type="filter"/> DOB	<input type="filter"/> Invite Date	<input type="filter"/> Usual Surgery
<input type="checkbox"/>	ALAN, ANDREW PAUL	02/01/1967	11/04/2013	
<input type="checkbox"/>	ROBERT, IVAN TERENCE	04/01/1973	03/06/2013	
<input type="checkbox"/>	THORNE, TONY	01/01/1970	03/06/2013	
<input type="checkbox"/>	TOBY, GRAHAM LEE	13/01/1981	03/06/2013	

All Categories

6. To merge patients select the registers at the base of the screen and choose OR, AND or Exclusive.

- **OR** - Find patients who are on one disease **or** another
- **AND** - Find patients who are on one disease **and** another
- **Exclusive** - This means the patient only belongs to those registers selected and no others



<input type="checkbox"/> Asthma	<input type="checkbox"/> Atrial fibrillation	<input checked="" type="checkbox"/> Cardiovascular disease primary ...	<input type="checkbox"/> Cervical screening
<input type="checkbox"/> Chronic kidney disease	<input type="checkbox"/> Chronic obstructive pulmonary ...	<input type="checkbox"/> Coronary heart disease	<input type="checkbox"/> Dementia
<input checked="" type="checkbox"/> Depression	<input type="checkbox"/> Diabetes mellitus	<input type="checkbox"/> Heart failure	<input type="checkbox"/> Hypertension
<input type="checkbox"/> Hypothyroidism	<input type="checkbox"/> Learning disabilities	<input type="checkbox"/> Medicines management	<input type="checkbox"/> Mental health problems
<input checked="" type="checkbox"/> Peripheral arterial disease	<input type="checkbox"/> Records and information	<input type="checkbox"/> Sexual health	<input type="checkbox"/> Smoking
<input type="checkbox"/> Stroke and transient ischaemic ...	<input type="checkbox"/> [Exceptions]		

OR
 AND
 Exclusive

Merge Options

 **Note** - The base of the screen shows what you have selected.

7. Select the patient(s) you want to send a letter to and choose the letter template from the drop down list.
8. Click the **Mail** icon on the toolbar and the recall letters open in a single Word document.
9. Print the letters and confirm they have printed successfully.

10. All disease invite Read codes are entered for patients on multiple registers eg there will be a Read code for hypertension, coronary heart disease etc