

SIS 10630 Vision 3 Release

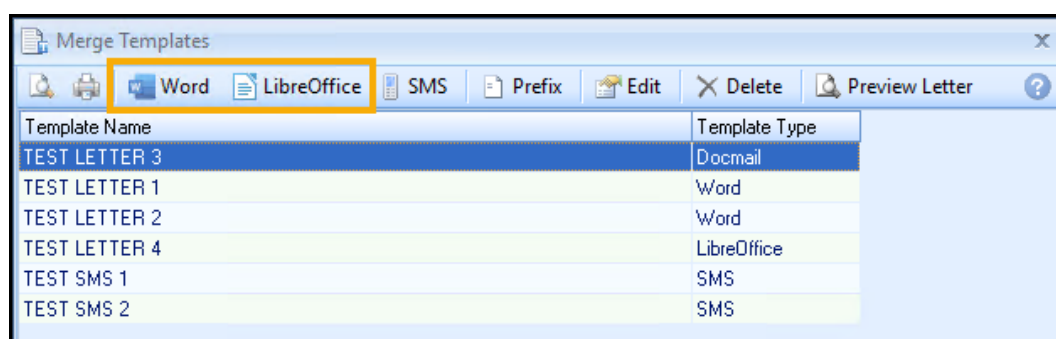
Summary of Changes

The following changes are included in the **Vision 3 SIS10630** release:

Practice Reports - Letter Templates

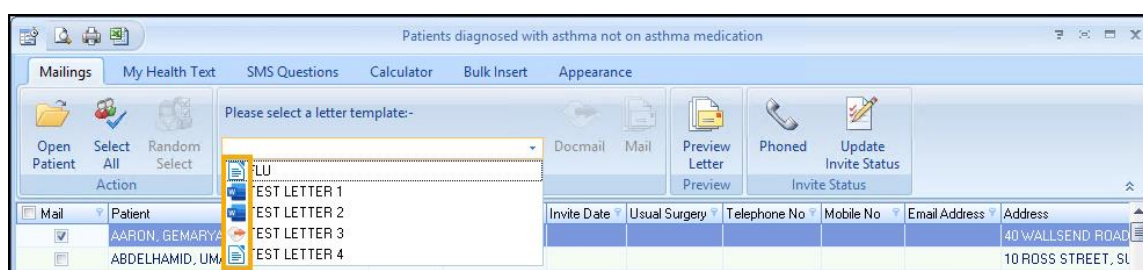
We now have the ability to select from multiple word processing applications when creating and using letter templates in **Vision+**:




- To create a letter template you now have the option to select from the word processing applications you have installed:



➔ See [Creating a New Recall Letter Template](#) on page 4 for more details.

- When selecting letter templates from the **Mailings** screen you can now view which word processing application the template was created in:



-  - Letter templates created in Word
-  - Letter templates created in LibreOffice
-  - Letter templates created in Docmail

➔ See [Recalling Patients by Letter](#) on page 8 for more details.

Patient Summary Printout

We have improved the **Patient Summary Printout** in line with template changes:

- Example of a printout with coded controls:

Clinical summary

Smoking, weight, blood pressure

Current smoking status

Description	Event Date	Value	Code	Comments	Priority	Range
Never smoked tobacco	28/10/2019		266919005	PATIENT SMS REPLY	3	

Blood Pressure

Description	Event Date	Value	Code	Comments	Priority	Range
Systolic BP reading	16/05/2022	120	271649006			
Diastolic BP reading	16/05/2022	95	271650006			
Systolic BP reading	08/07/2019	150	271649006			
Diastolic BP reading	08/07/2019	100	271650006			
Systolic BP reading	01/07/2019	130	271649006			
Diastolic BP reading	01/07/2019	90	271650006			

Body Weight

Description	Event Date	Value	Code	Comments	Priority	Range
Body weight	01/12/2021	103	27113001			

BMI

Description	Event Date	Value	Code	Comments	Priority	Range
Body Mass Index	01/12/2021	26.2	60621009			
Body mass index	01/12/2021		60621009		3	

Renal function

eGFR

Description	Event Date	Value	Code	Comments	Priority	Range
GFR calculated abbreviated MDRD	05/05/2022	23	1020291000000106			

- Example of a printout with non-coded controls:

Asthma Diagnosis

Description	Event Date	Value	Code	Comments	Priority	Range
Acute exacerbation of allergic asthma	27/05/2022		708093000	Next review date=Enter a date here		

Patient Status [27/05/2022]

Moved into Care Home Does not need care Home
 Moved out of Care Home Refuses to go to Care Home

Care Home Status [27/05/2022]

Care home resident Full facilities Has Family visits DNPR completed
 Private paid resident Partial facilities No family visits

ACTIVATE HIDDEN CONTROL (No save on data)

Activate hidden control
 Deactivate hidden control

HIDDEN CONTROL WITH DATA [27/05/2022]

Has Visits by Friends Has visits by family Has visits by residents

QAIF Vision+ Practice Reports - Wales Only

- **Vision+ Practice Reports** is updated in line with **QAIF 2021/2022 Business Rules**.

QOF Vision+ Practice Reports - England Only

- **Vision+ Practice Reports** is updated in line with **QOF46 Business Rules**.

We have also addressed the following issues in this release:

- **Warfarin Audit Report** - The report was showing an error if the patient's record contains an International normalised ratio (INR) clinical term without a value, this has now been fixed.
- **User Feedback** - We have fixed an incompatibility issue with the **User Feedback** form and **Internet Explorer 11**. To improve the product we ask you to feedback any issues you may have, see [User Feedback \(opens the Vision+ Help Centre\)](#) for more details.

Creating a New Recall Letter Template

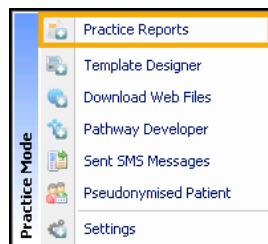
The first stage to recalling patients is to design your **Template**. The **Vision+** Letter template tools are based on mail merge. From within **Practice Reports** you create new templates using your preferred word processing application, or modify and delete any that you no longer require. Alternatively, you can create **SMS Recall** templates for patients you want to invite by text message, see [Creating a Recall/Healthcare Invite SMS Message Template](#) for details.



Training Tip - To access the **Vision+ Practice Reports**, you must not have a patient selected in **Consultation Manager** or the patient-specific menu displays.

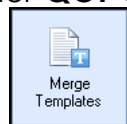
To create a new recall letter template:

1. From the **Windows Notification Area**, right click **Vision+**  and select **Practice Reports**:

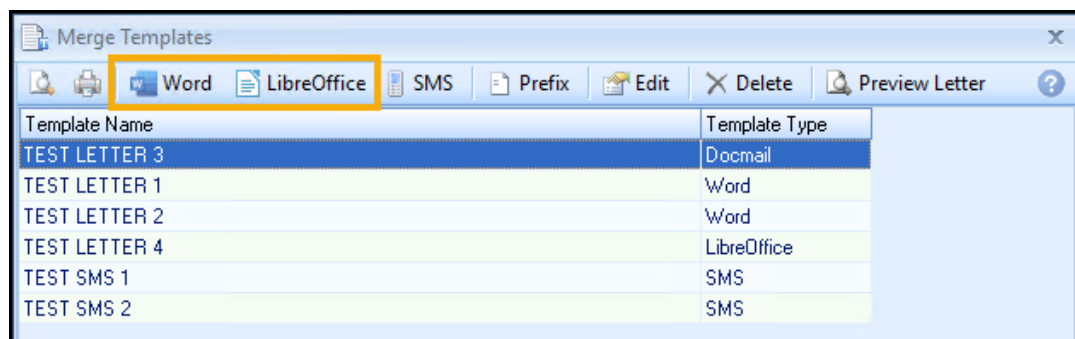
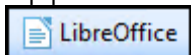


2. Select either **QOF** or **Practice Lists** as required and then select **Merge**

Templates

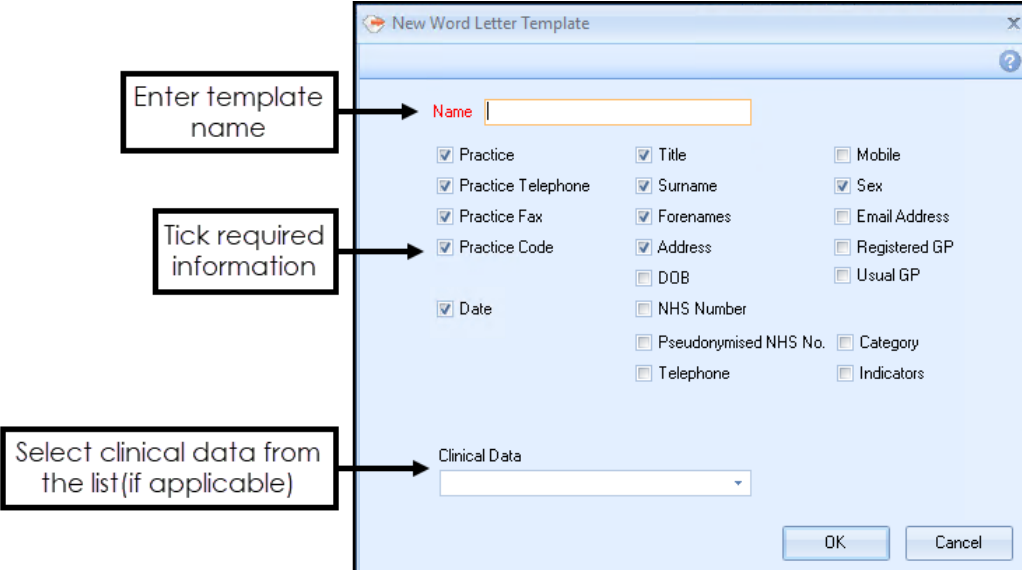


3. From the **Merge Templates** toolbar, select the word processing application you are using, for example **Word**



Note - The word processing applications display depending on what you have installed.

4. The **New Letter Template** screen displays, complete the following:



- **Name** - Enter a descriptive title for the new template.



Training Tip - For QOF/QAIF Templates you may want to include the word QOF/QAIF in the name so you can easily distinguish between QOF/QAIF and non-QOF templates.

- **Patient Information** - Tick against each item of information from the patients records that you would like to merge into the letter, or untick any items you do not require.



Note - For Practices in Scotland the **NHS Number** merge field is replaced with **CHI Number** and for practices in Northern Ireland **H+C Number** is shown.

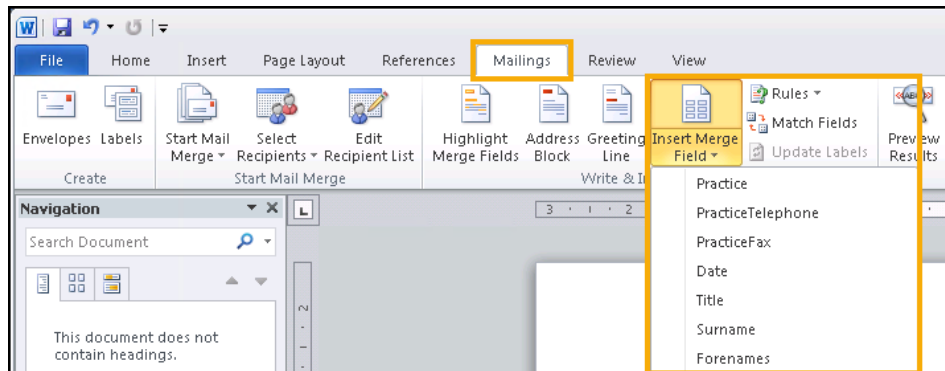
- **Clinical Data** - If applicable, select the clinical data from the list to be included in the mail merge. When clinical data is selected, the merge fields available in the extract are made available to the word processing application. This is an extremely useful way of getting patient data into letter form.

5. Select **OK** and the word processing application opens up in a new window with a basic template layout.

If you are using Microsoft Word:

- a. Use Microsoft Word to make any changes to the template layout that you require.

Any mail merge fields display with << >> around them, you can move them around or copy them to other areas of the document as required. Alternatively, you can insert additional merge fields from within **Microsoft Word** by selecting **Mailings - Insert Merge Field:**



You can use all of the familiar word processing features in **Microsoft Word** to make the layout of the letter more attractive.

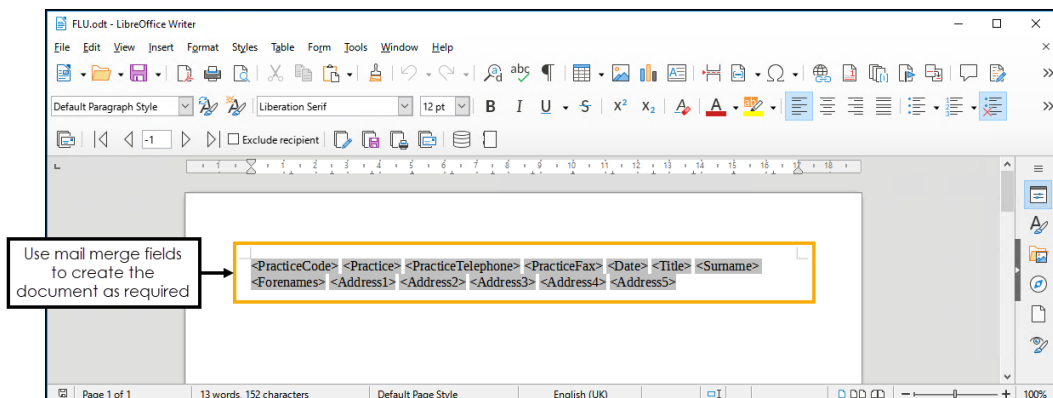


Important - We highly recommend you add a disclaimer to any reports or letters you produce, for example, 'This document may contain sensitive or confidential data, please treat accordingly'.

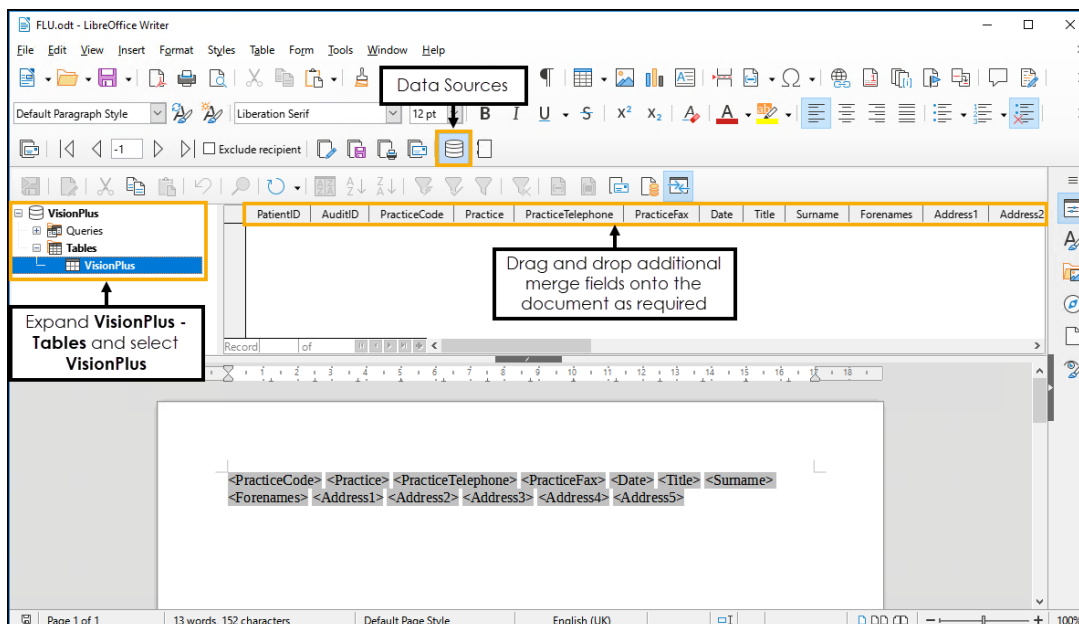
- b. Once you have finished, from **Microsoft Word**, select **Save** .
- c. Close **Microsoft Word**.

If you are using LibreOffice:

- a. Use **LibreOffice** to make any changes to the template layout that you require. The mail merge fields selected display on the screen with a < > around them, you can move them around or copy them to other areas of the document as required:




Alternatively, you can insert additional merge fields from within **LibreOffice**, select **View - Data Sources** or select **Data Sources** from the toolbar. Expand **VisionPlus - Tables**, select **VisionPlus** and the additional merge fields display to the right. Drag and drop additional merge fields onto the document as required:



You can use all of the familiar word processing features in **LibreOffice** to make the layout of the letter more attractive.

i Important - We highly recommend you add a disclaimer to any reports or letters you produce, for example, 'This document may contain sensitive or confidential data, please treat accordingly'.

- d. Once you have finished, select **Save** .
- e. Close **LibreOffice**.

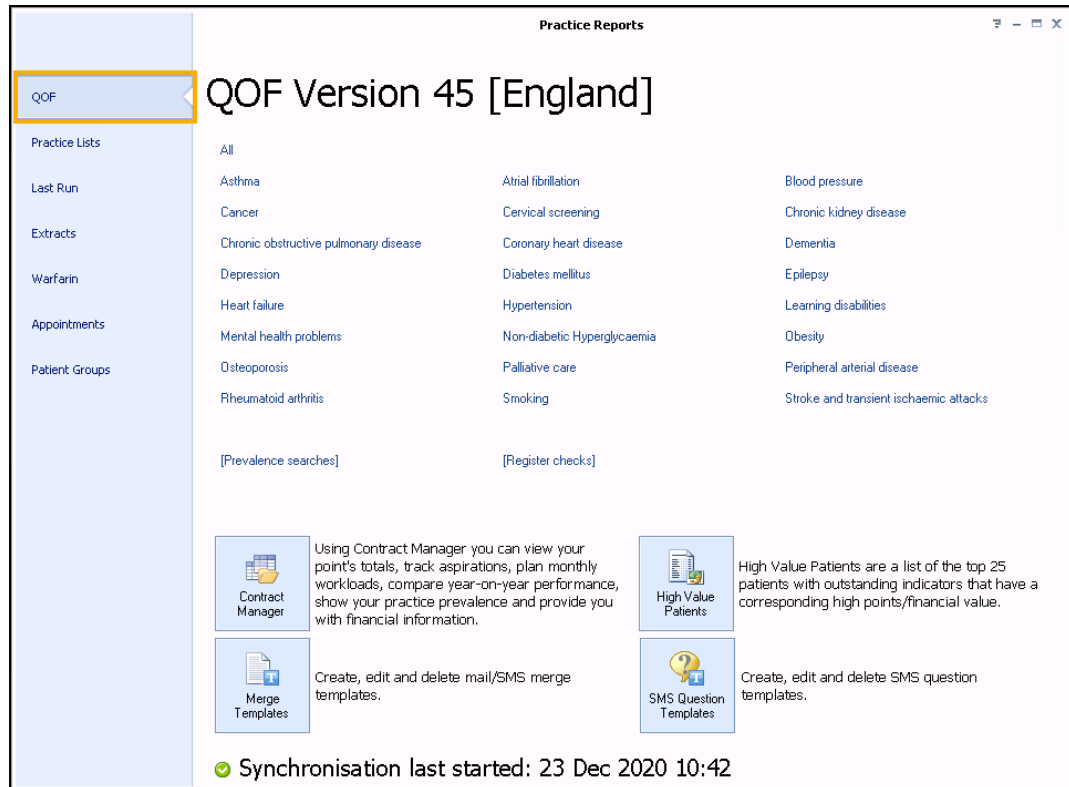
You should now see the new letter template displayed in the list on the **Letter Templates** screen.

→ See [Attaching a Letter to a Non-QOF Template](#) for details.

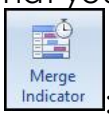
Recalling Patients by Letter

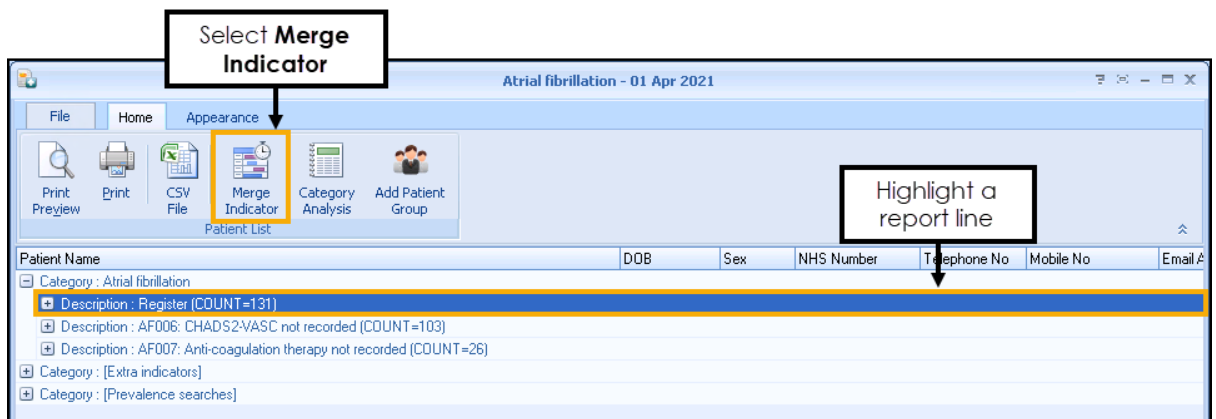
You can send a recall letter to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF/QAIF or Enhanced areas.

1. **Practice Reports** opens by default on the QOF/QAIF page but you can select any report. Select the required report to run it:

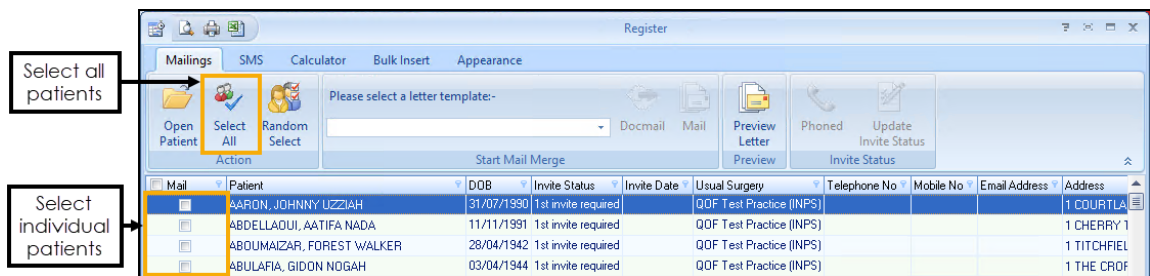


2. When the report is complete, it displays on a new tab. Highlight a cohort line of patients that you want to send a text message to and

select **Merge Indicator** :



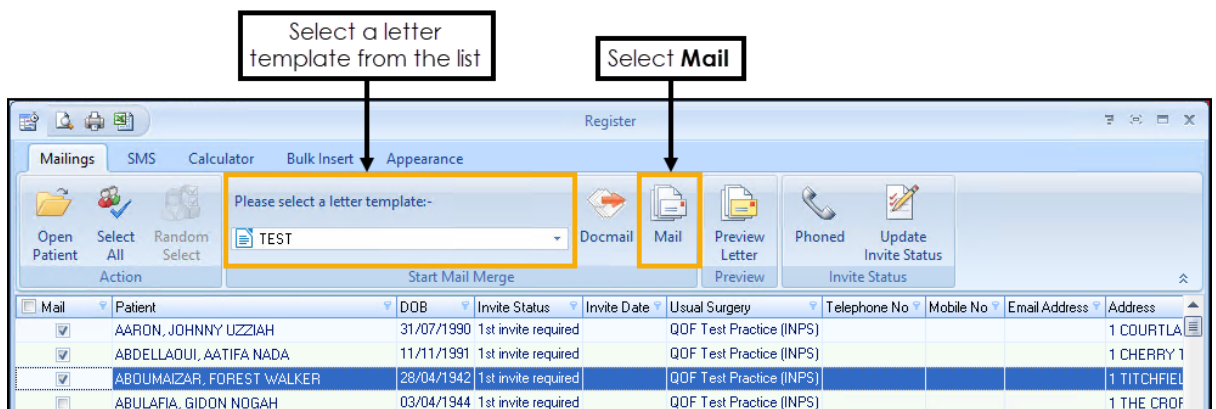
- The **Mailings** screen displays, select the **Mail** checkbox for each patient that you want to recall:



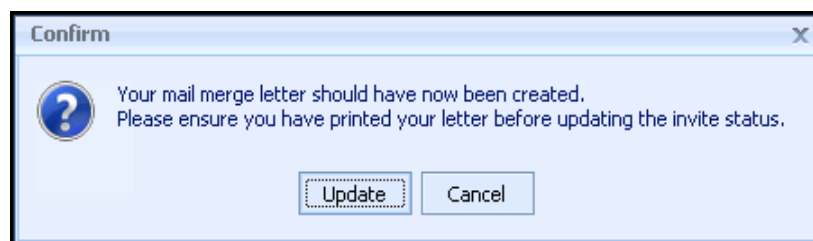
Training Tip - If you want to select or clear all the checkboxes, use **Select All** from the toolbar, this is useful for managing larger lists.

- Next, from **Please select a letter template** on the toolbar, select the

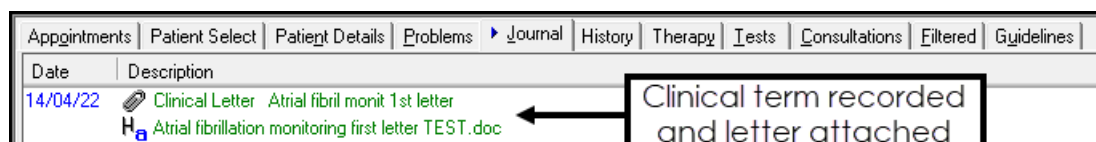
required template and then select **Mail**:



- The recall letters open in a single document, ready to be printed. **Vision+** also adds an appropriate Clinical term into the patient's medical record to help manage the recall status. For more information on the recall status, see [Managing the Recall Invite Status](#).
- Print the recall letters and select **Update** to update the invite status:



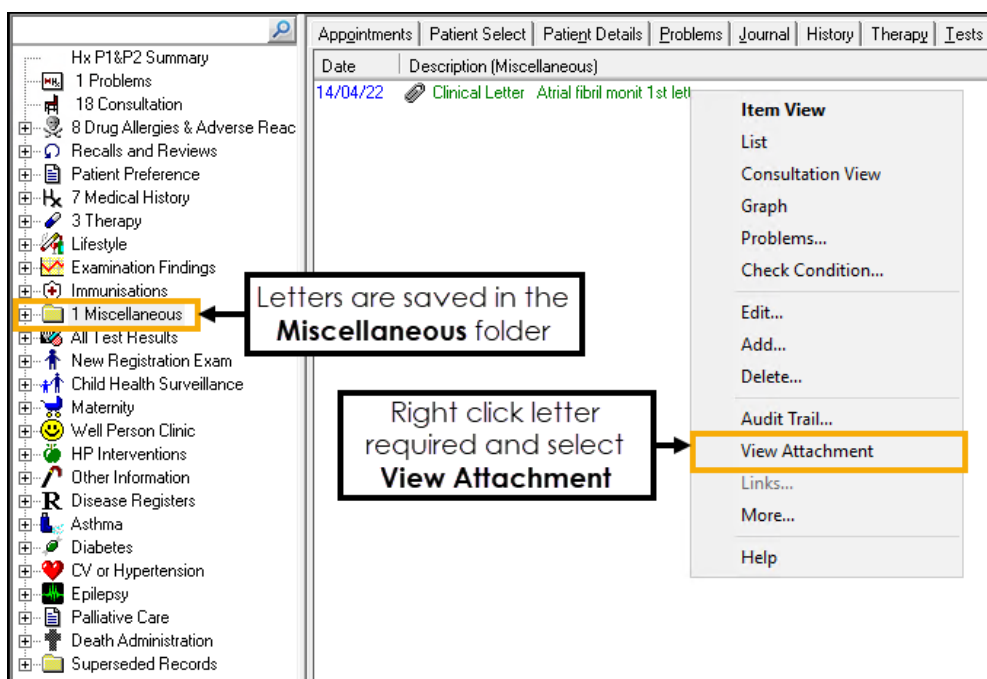
- The mail merge letters automatically save in the patient's record along with the relevant clinical code as a history entry:



Viewing a Saved Letter

To view a saved letter:

1. From **Vision 3 - Consultation Manager**, find the letter in the patient's record or select it from the **Miscellaneous** folder on the **Navigation Pane**:



2. Right click on the required letter and select **View Attachment**.



Note - The letters save as individual documents in the P:\attach folder.