My Health Online Configuration Guide – Wales only

Version 3

1st February 2023

Contents

My Health Online - Configuration User Guide

Introduction

My Health Online (MHOL) is a website that enables patients registered in Wales to request services from their GP practice online, at a time that is convenient to them.

Current online services are:

- **Appointments** - Enables patients to view, book, or cancel appointments with their doctor/nurse.

- **Medication** - Enables patients to request their medication. The message is sent to the practice to action, the patient then collects the prescription as per the practice protocol.

- **Demographics** - Enables patients to update view and/or update certain aspects of their demographic information.

- **Summary Data** - Enables patients to view their recorded allergy, prescription history and given immunisations.

- **Detailed Coded Record (DCR)** - This enables patients to see detailed coded information such as diagnosis, examination findings such as blood pressure, procedures and investigations. What displays depends on settings within the GP practice.

This guide explains how to set up and configure online services within **Vision 3 - Control Panel** ready for your patients to access the services you choose to enable.

Enabling Patient Online Services

To enable patient online services:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online** and the **Vision Online Services** screen displays:
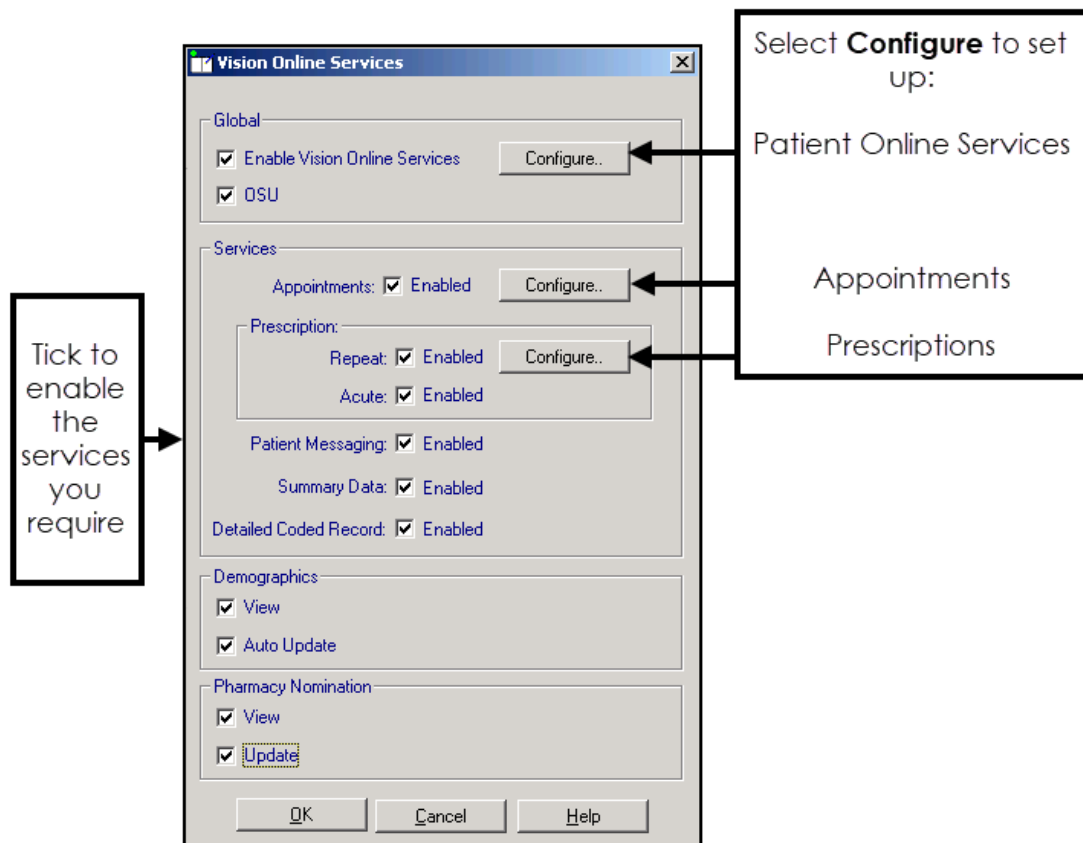
2. Tick **Enable Vision Online Services** to enable patient online services.
3. You now need to configure your global settings:

Setting your Global Configuration

Within **Global**, select **Configure** .

The following three global tabs require configuration:

- **Welcome** on page **6**
- **Registration** on page **7** - Set a time frame for unused registration letters and un-activated accounts.
- **NHS Mail** - No Longer used.

Welcome

The welcome message displays on the home page of the website following a successful login by your patients.

To set up the welcome message:
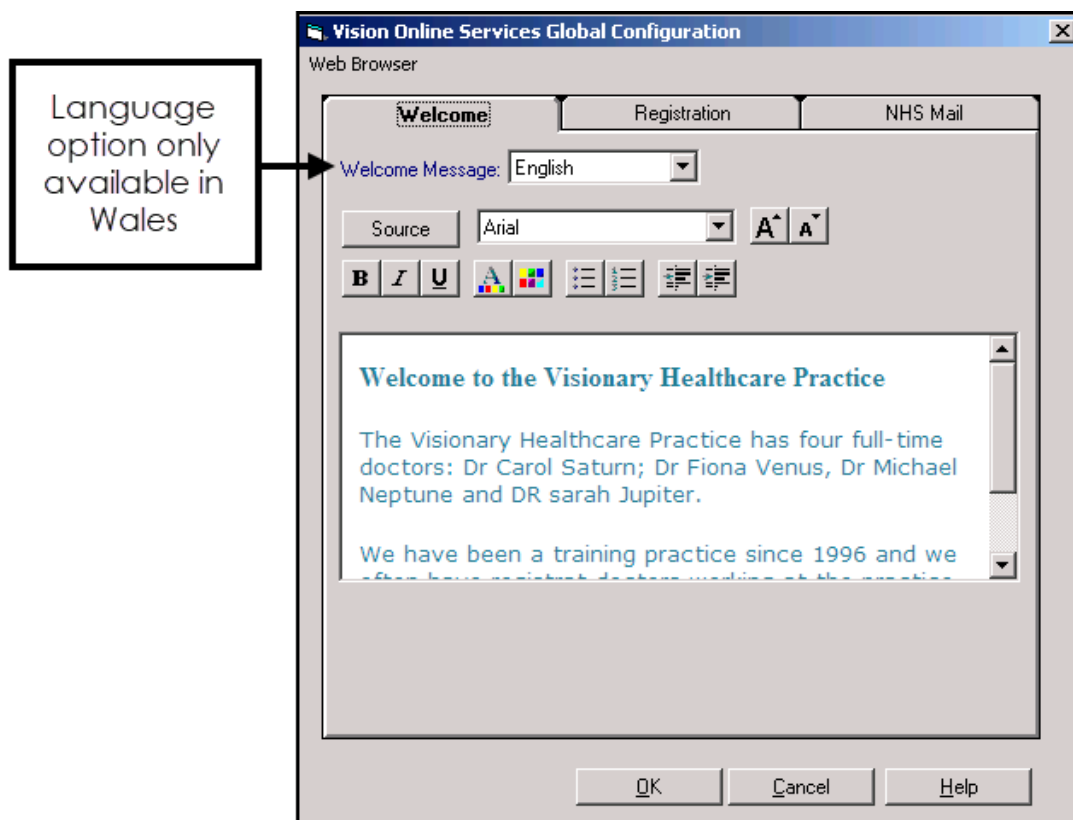
1. Select the **Welcome** tab and type your message in the message window using the formatting editor provided.

See **Using the Message Editor** on page **32** or **Formatting HTML Messages** on page **34** for details.

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2. Select **OK** to save.

Repeat the above 2 step process having selected **Welsh** from the language list.

Note - To help prevent confusion surrounding who your patients contact if they have a problem, please add advice to your patients within your welcome messages advising them to contact the practice if there is a query about prescriptions or appointments availability.

Registration

From the **Registration** tab, set up the following:

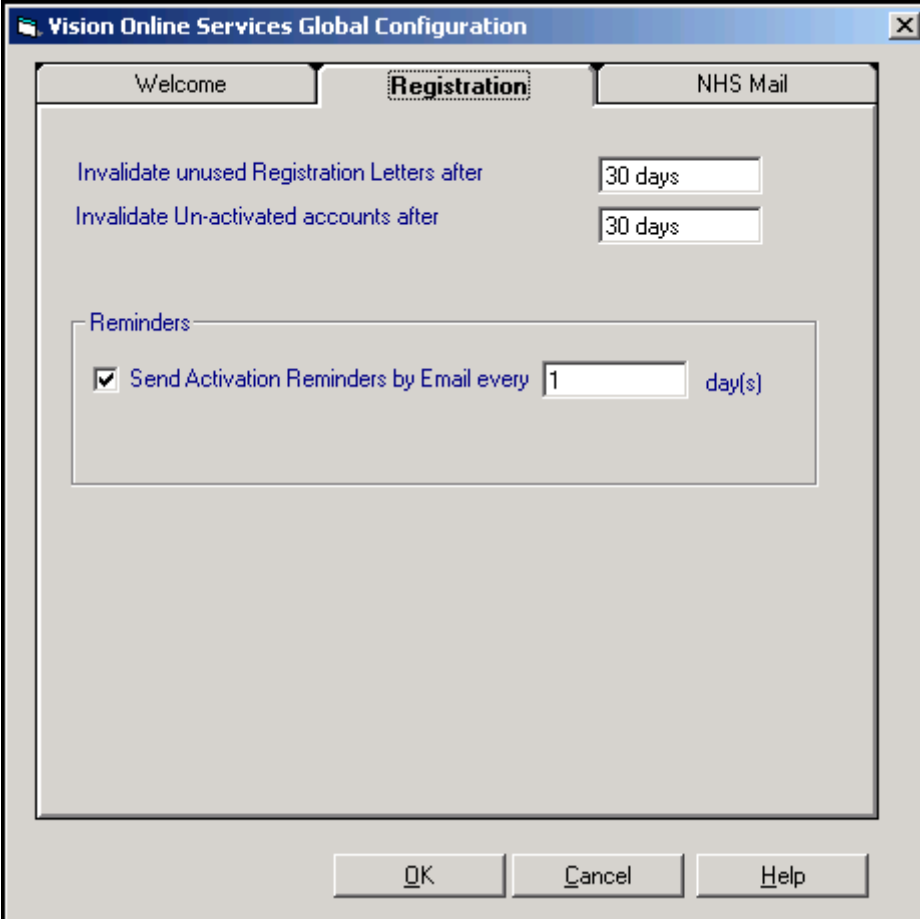- **Invalidate unused Registration Letters after** - Select a time frame for unused registration letters to expire. The expiration date prints on the patients' registration letter.

- **Invalidate Un-activated accounts after** - Select a time frame for un-activated accounts to expire. On registering, patients receive a confirmation code which activates their account. If the account is not activated by the expiry date, they need to re-register for online services.

- **Reminders** (England, Scotland and Northern Ireland only) - Tick to send activation reminders by email every *n* day(s) (where n is the number of days you set).

You have now activated Online Services and need to configure the individual modules.

Enabling a Basic Online Services Account

You can enable your patients to register for a basic online services account, also known as an **Online Services User (OSU)**. Registering as an **OSU** allows patients to quickly and easily register and book appointments online:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **OSU** to allow your patients to create a basic online services account:
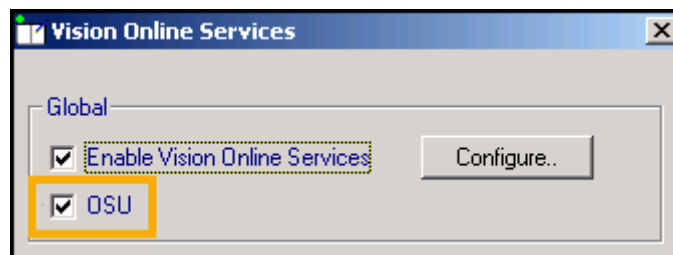
3. Select **OK** to save.

Enabling and Configuring Online Appointments

> **Note** - You must have System Administrator rights to enable and configure patient online services

To enable online appointments:

1. From **Vision 3 - Management Tools** select **Control Panel - File Maintenance - Online** [Online].

2. The **Vision Online Services** screen displays, tick **Appointments** to enable online appointments:
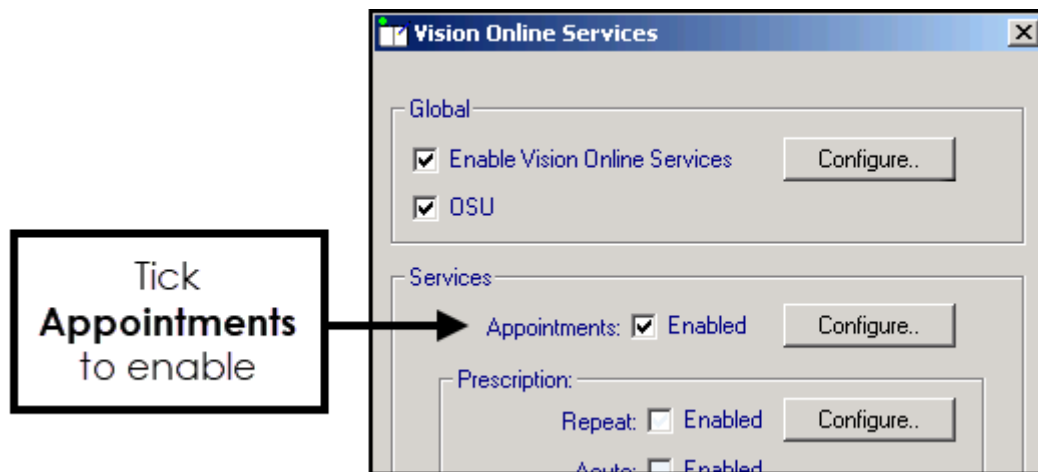

3. Now select **Configure** to customise how appointments works for your practice.

You need to determine which staff and sessions you want to be available from the **Patient Services** website and set up how you want online appointments to work for you. There are seven tabs that should be considered:
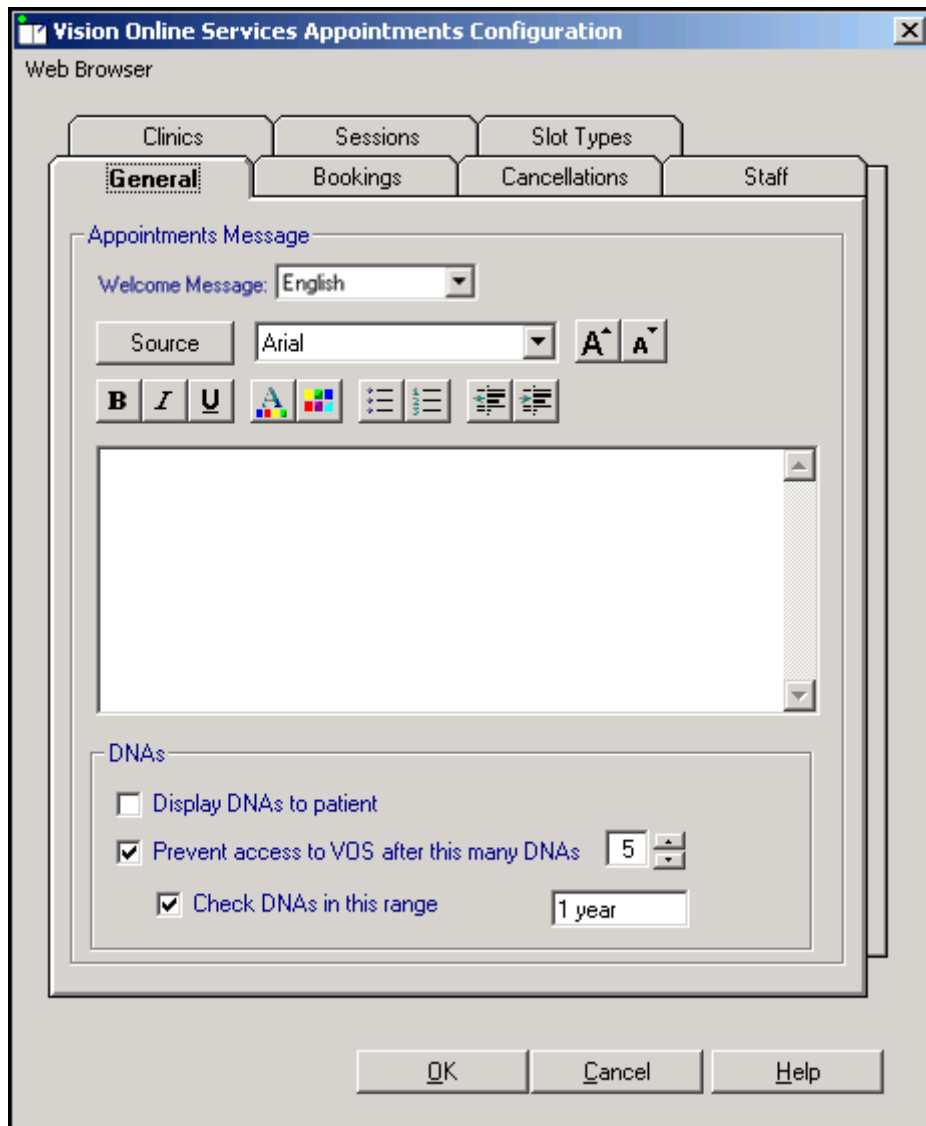
General Tab

The **General** tab enables you to setup the following:

- **Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.

- **Appointments Message**, see **Add Appointment Message** on page **11.**

- **Did Not Attend (DNA)**, see **Did Not Attends (DNAs)** on page **12.**

Add Appointment Message

The **Appointments Message** is a practice specific message that displays on the **Appointments** page of the website.
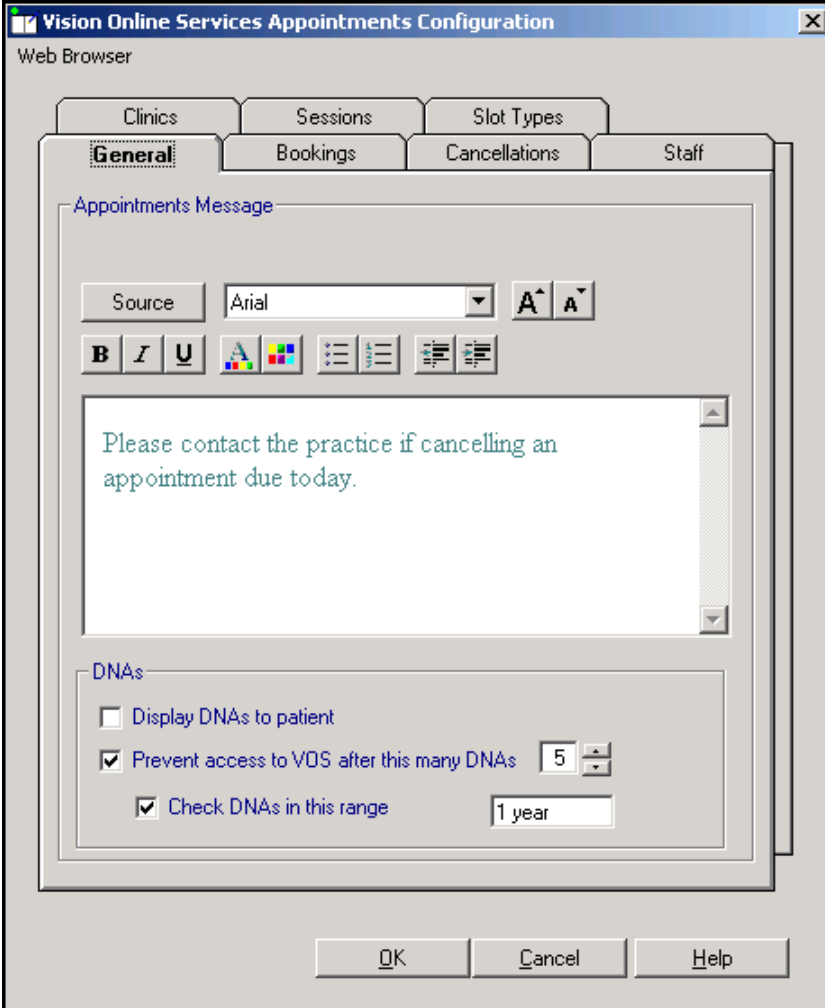
To add an **Appointment Message**:

1. From **Online Services Appointments Configuration** select the **General** tab.

2. Type your message in the **Appointments Message** window using the formatting editor provided. If you prefer, you can customise your message source using HTML formatting tags, see **Formatting HTML Messages** on page **34**:

3. Select **OK** to save.

> ✏ **Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Appointment Message** *'In the case of a query regarding booking or cancelling an appointment please contact the surgery in the usual way'*.
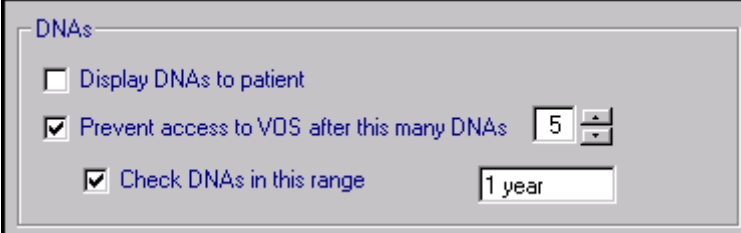
Did Not Attends (DNAs)

You can manage DNAs within online appointments, from **Online Services Appointments Configuration**, select **General - DNAs** and then select from:

- **Display DNAs to patient** - Tick to enable patients to view their DNA appointments.

- **Prevent access to Online Services after this many DNAs** - Tick to limit patient access after a set amount of DNAs (removing the tick disables this function) and enter a number of DNAs permitted before the user account is disabled.

- **Check DNAs in this range** - Tick to specify a date range for the DNA's if required and set the date range:
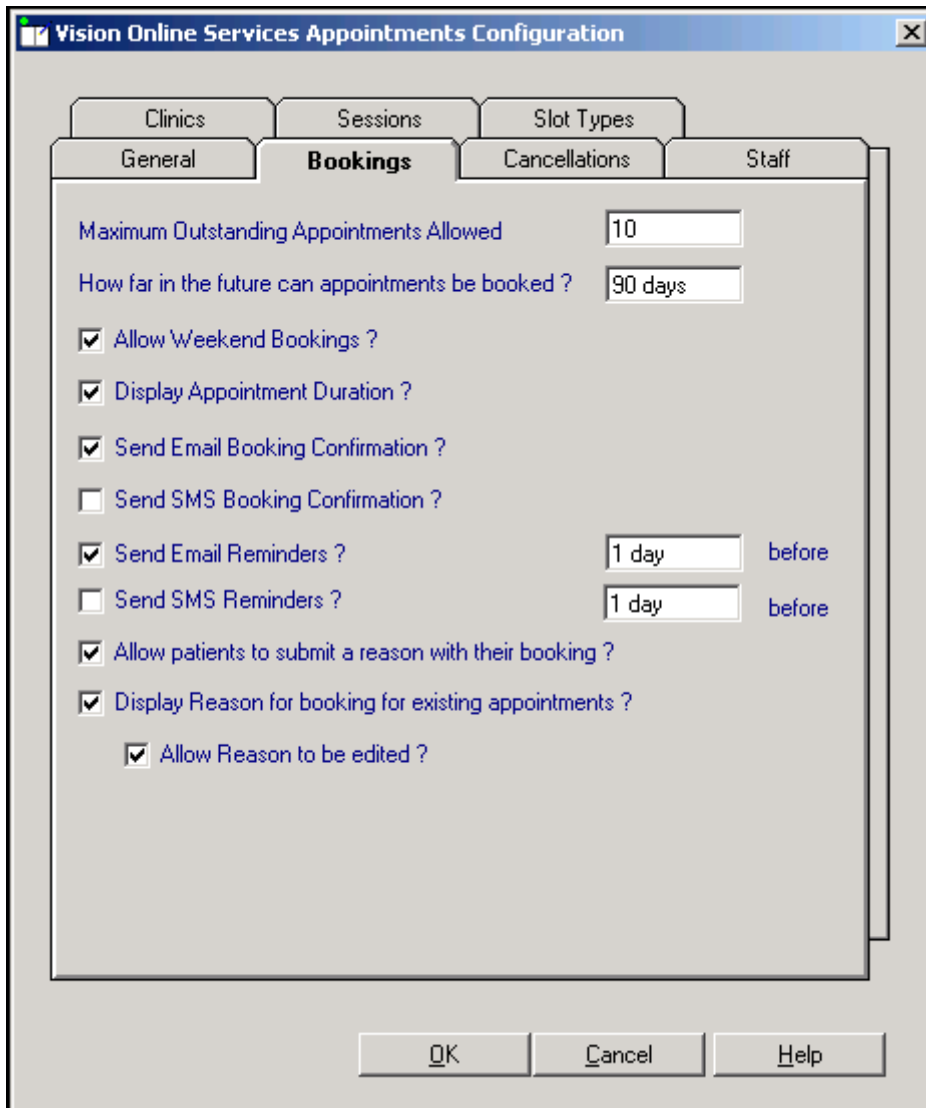

Should a patient exceed the number of DNA's you have set here, the next time they log into their Patient Online Services account, there are no links to **Appointments** and they have to contact the surgery direct to arrange an appointment.

Bookings Tab

The **Bookings** tab allows you to configure existing and new online appointment bookings:

Complete as required:

- **Maximum Outstanding Appointments Allowed** - You need to decide how many outstanding appointments a patient can have booked at any one time. Enter the number of appointments you want to allow. The default is 0 which enables your patients to book unlimited appointments. If the patient reaches the limit (by either online or practice booked appointments), the patient receives a message which states '*You have reached the maximum number of bookings allowed. No further bookings can be made at this time.*'.

- **How far in the future can appointments be booked** - You need to decide how far in advance your patients can book an online appointment. Enter the number required, followed by **D** (days), **W** (weeks), **M** (months), or **Y** (years).

- **Allow Weekend Bookings?** - If you provide weekend appointments, tick to enable weekend appointments to be available online.

- **Display Appointment Duration?** - Tick to display the duration of the appointment being booked to the patient.

- **Send Email Booking Confirmation?** - Tick to email active online registered patients confirmation of their appointments booked online or in the practice.

- **Send SMS Booking Confirmation?** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.

- **Send Email Reminders?** - Tick and then specify how long before due time the patient is to be reminded by email.

- **Send SMS Reminders?** - SMS Messaging is no longer a free option via NHS.net, therefore the option is disabled.

- **Allow patients to submit a reason with their booking?** - Tick to allow your patient to add a comment when booking appointments.

- **Display Reason for booking for existing appointments?** - Tick to enable your patients to view the booking reasons for existing appointments booked at the practice.

- **Allow Reason to be edited?** - Tick to allow patients to edit the reason for booking.

Cancellations Tab

From the **Cancellations** tab you can:

- Set a time period for cancelling appointments.

- Determine if email confirmation messages are sent.

- Set cancellation reasons, see **Cancellation Reasons** on page **16**:

Complete as required:

- **How close can appointments be cancelled?** - To set the cancellation time frame, enter a number of hours and minutes as required. If your patient attempts to cancel an appointment during the cancellation cut-off period they are advised '*This appointment cannot be cancelled online. Please contact your GP Practice*'.

  Enable Cancellation Confirmation if you want the patient to receive email confirmation when an appointment is cancelled:

  - **Send Email Cancellation Confirmation?** - Tick to send an email if an appointment is cancelled either at the practice or online.

  - **SMS Cancellation Confirmation?** - SMS Messaging is no longer a free option via NHS.net, therefore this option is disabled.

Cancellation Reasons

To manage the **Cancellation Reasons**:

1. From **Vision Online Services Appointments Configuration** select the **Cancellations** tab:
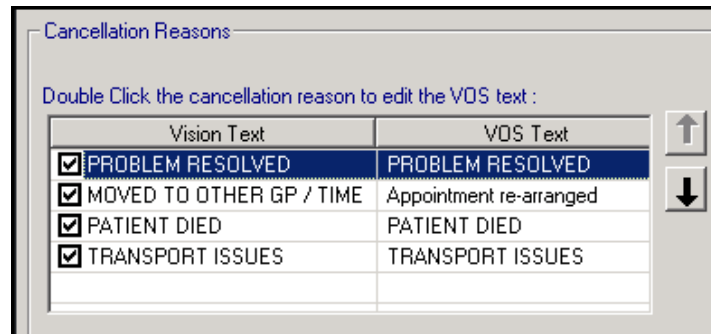
2. Double click the cancellation reason to edit and the **Vision Online Services change VOS Text** screen displays:
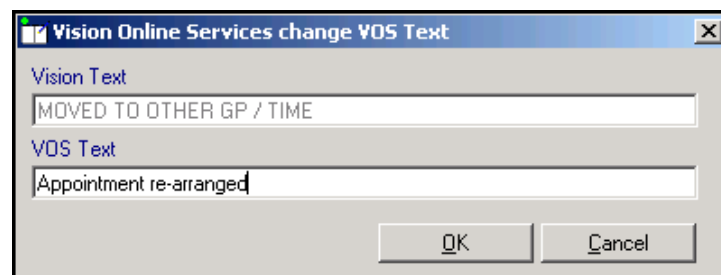
3. Enter the text you require and select **OK**.

4. Change the order the cancellation reasons display in by using the up and down arrows. Highlight the reason you wish to move and use the arrows to move it to the required position in the list. To hide a cancellation reason from your patients, remove the tick that proceeds it.

    Important - If all cancellation reasons are deselected (hidden) patients are unable to cancel appointments online.

5. To set one of the cancellation reasons as a default, highlight the required reason, right click and select **Set Default**. The default is displays in bold:
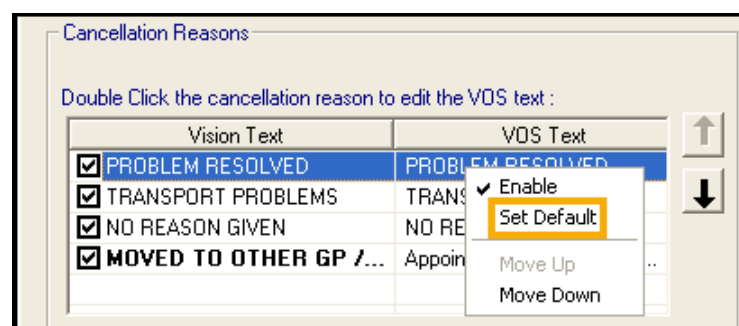
Staff Tab

The **Staff** tab allows you to decide which clinical staff appear in online appointments and are available for your patients to book.

To set up your staff:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Staff** tab.

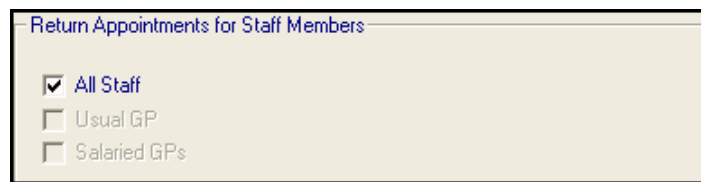2. The following options are available however we recommend you do not use them as they do not allow the correct mix of staff:

- **All Staff** - Displays all active clinical staff listed in **File Maintenance** (including admin staff with a clinical role).

> Note - This can lead to a very long list of clinicians being offered to your patients.

- **Usual GP** - Displays only the patient's Usual GP.

- **Salaried GP** - Displays only those GPs set as **Salaried GPs** in **File Maintenance**.

To setup staff individually (Recommended):

1. From the **Vision Online Services Appointments Configuration** screen, remove the tick from **All Staff**.

2. Select **Add** and a list of all clinical staff from the **File Maintenance** list displays.

3. Select the required clinician's name from the list and select **OK**:
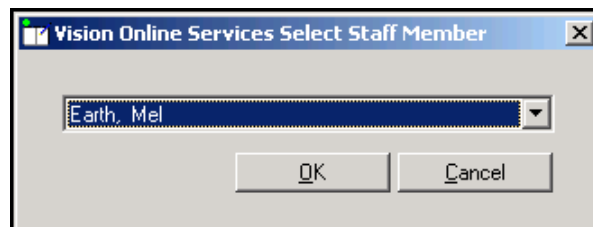
4. Repeat steps 2 - 3 until you have added all the staff required.

5. Select **Cancel** to finish.

> Note - Staff need to be set up as normal in **Control Panel** - **File Maintenance** and **Appointments** for you to be able to add into the **Online Services Staff** tab.

Adding Gender, Special Interests & Language

Gender, **Role**, **Special Clinical Interests**, **Written** and **Spoken Languages** of any clinician providing online appointments displays online. For each clinician selected for online appointments the following should be completed:
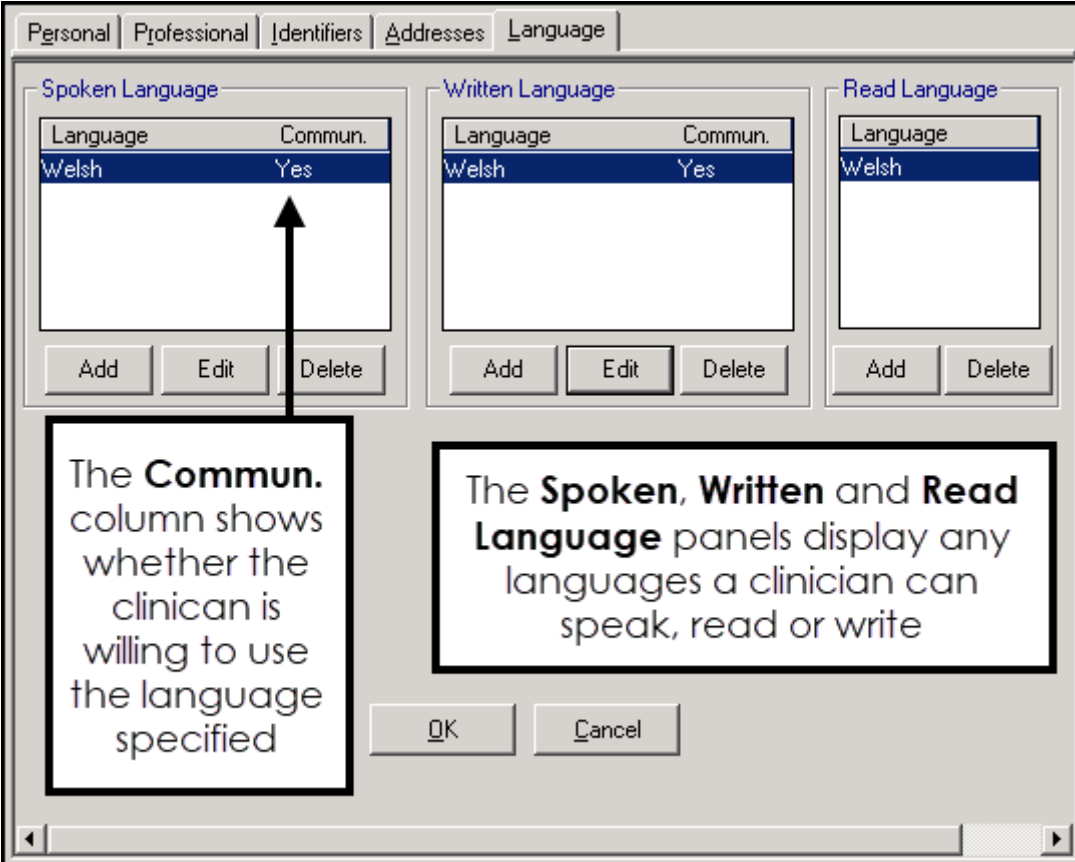

1. From **Vision 3** - **Control Panel** - **File Maintenance - Staff** select the staff member, right click and select **Edit Staff**.

2. Complete each tab as follows:

- **Personal** - Select **Sex** and then select the correct gender.
- Professional:
  - Check the **Role** selected is correct.
  - Set the **Main** and **Interest Specialty** from the available lists.
- **Language** - Check the **Spoken**, **Written** and **Read** languages options are complete and correct where added:
  - To add a language if required, select **Add** under the correct section (**Spoken**, **Written** or **Read**), select from the available list and select **OK**.

3. Select **OK** to save.

Clinics Tab

The **Clinics** tab enables you to determine which clinics (ad-hoc sessions that are not linked to a specific clinician) are available to your patients online.

To add clinics:

1. From the **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.

2. **All Clinics** is ticked by default, to change this to specific clinics, remove the tick:
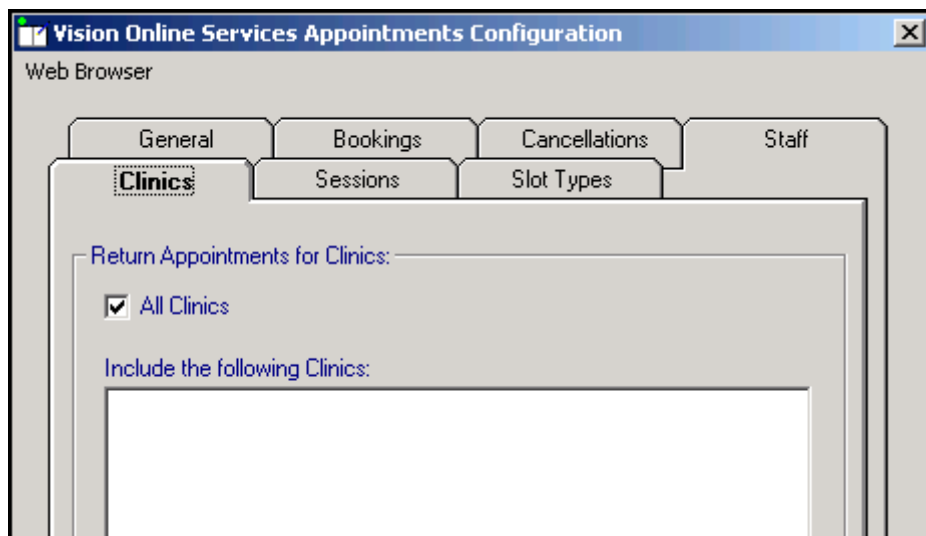
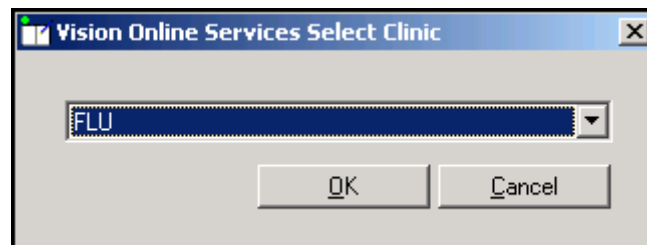3. Select **Add** and the **Vision Online Services Select Clinic** screen displays:

4. Select the required clinic from the list and select **OK**.

5. Repeat step 3 and 4 until you have added all the clinics you require.

6. If you have selected all the clinics in the list you are prompted '*All available clinics have been added to the list.*', select **OK** to continue.

To remove a clinic from the list:

1. From **Vision Online Services Appointments Configuration** screen, select the **Clinics** tab.

2. Highlight the clinic to remove.

3. Select **Remove**.

4. You are prompted '*Are you sure that you want to remove (name of clinic) from the list?*', select **Yes** to remove.

Sessions Tab

The **Sessions** tab allows you to configure site access and locations for sessions available within online appointments:
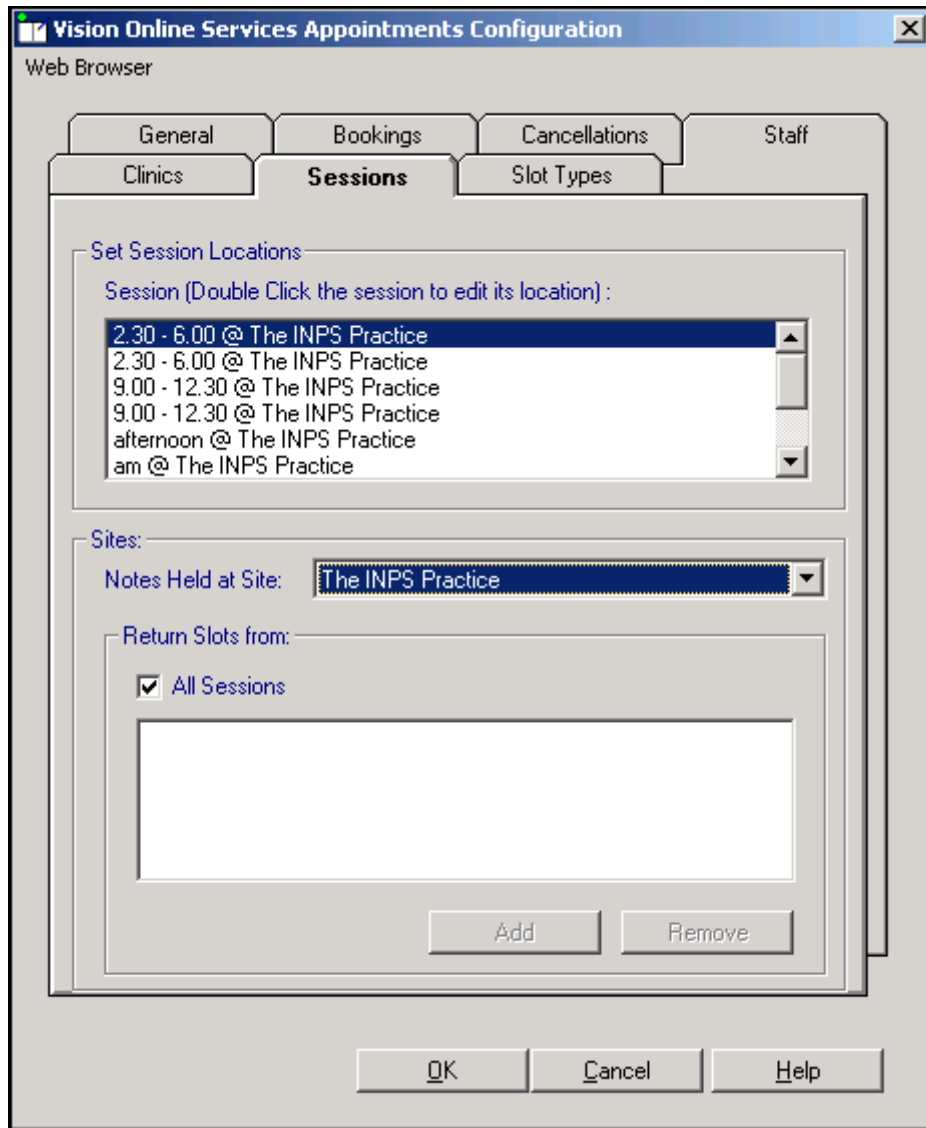
✏️ **Note** - Slots are not available online until they are marked as

Reserved for Web (Appointments [ ]) or **Available for web**

(Appointments [ ]/[ ]).

Setting Sessions, Locations and Sites

To set session locations and sites:

1. From **Online Services Appointments Configuration** screen, select the **Sessions** tab.

2. Complete as required:

   - Set Session Locations:

     - **Session** - Lists all sessions added or created in **Appointments**. Double click on a session to display the list of available locations, select the location you require and select **OK**.

     - **Sites** - Specifies which sessions should be included for each location. This enables you to limit which sessions are included online:

       - **Notes Held at Site** - Select the site required and then either leave the tick in **All Sessions** or remove the tick and select **Add** to select the specific sessions required and repeat as necessary. Select **Cancel** to finish. If you have branch surgery(s) change **Notes Held at Site** to the alternative location and add sessions in the same way.

Removing a Session from the list:

1. Highlight the required session and then select **Remove**.

2. You are prompted '*Are you sure that you want to remove (name of session) from the list?*', select **Yes** to remove.
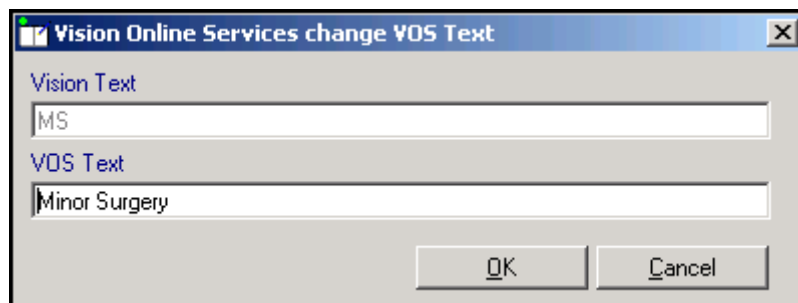
Slot Types Tab

The slot type displays when your patients are booking appointments online. Text used on slot types by staff should be changed to something appropriate for patients, for example '*MS*' should be changed to '*Minor Surgery*'.

To change the slot type text that displays:

1. From **Vision Online Services Appointments Configuration** select the **Slot Types** tab:
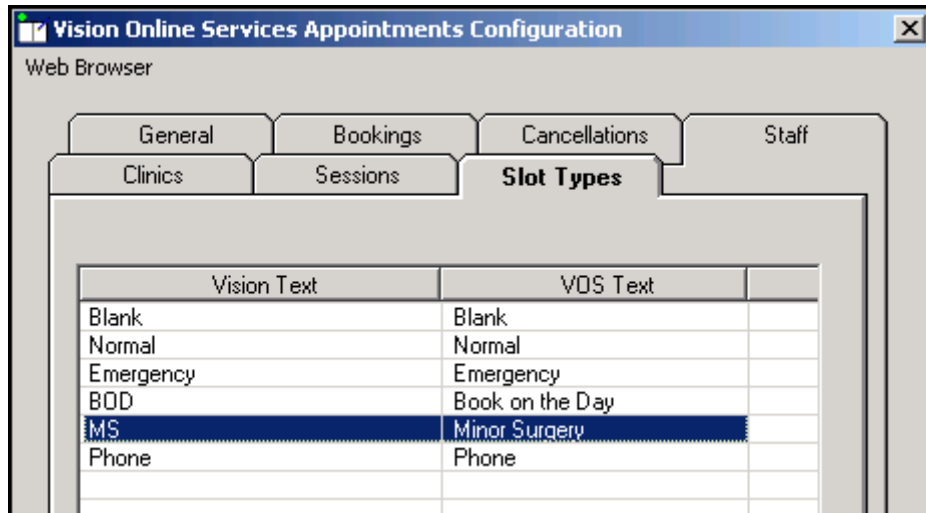
2. Double click the slot type to update and the **Vision Online Services change VOS Text** screen displays:

3. In **VOS Text**, enter the text you want to display and select **OK** to save.

4. Repeat steps 2 - 3 until all the slot types have **VOS text** listed.

Once you have considered and completed all seven tabs as required, select **OK** to save and close the **Vision Online Services Appointments Configuration** screen.

> **Remember** - You need to revisit **Appointments Configuration** when a clinician joins or leaves your practice.

You must now configure online appointments from **Appointments**:

- If you are using **Appointments** /, see [Enabling Web Bookings](#) in the **Appointments Help Centre** for details.

- If you are using **Appointments** , see [Creating Online Appointment Slots](#) in the on-screen help for details.

Enabling and Configuring Online Prescriptions

To enable online prescriptions:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **Prescription** and then tick:

   - **Repeat** to enable your patients to order repeat medications online.

   - **Acute** to enable your patients to request acute (one off) medications.

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

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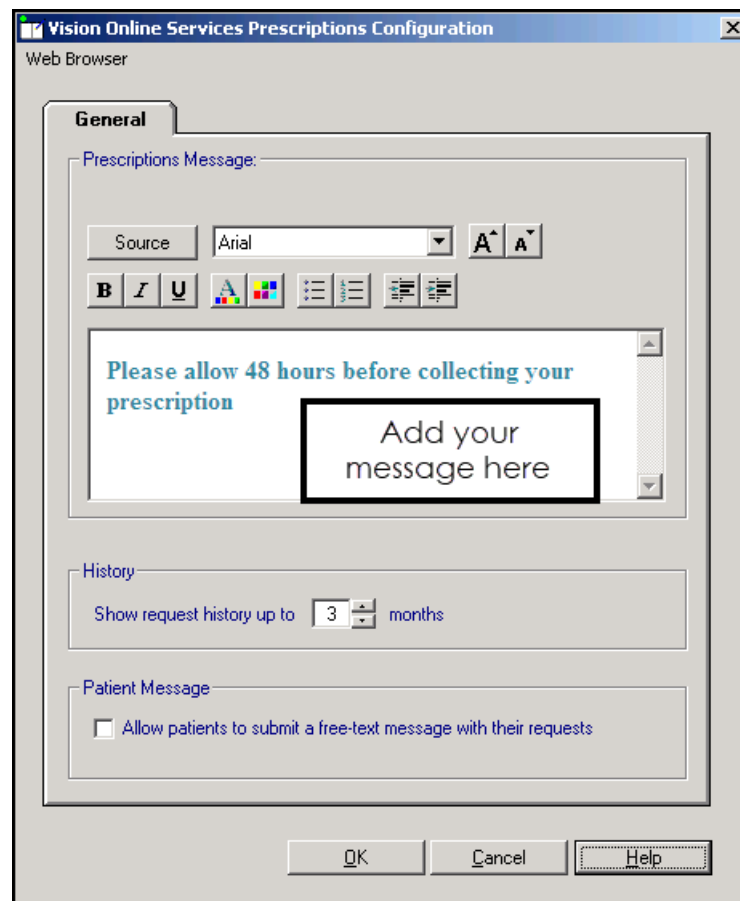
Control Panel - Online

From **Control Panel - Online** ![Online icon]:

Add 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 **32**, or

- HTML formatting tags, see **Formatting HTML Messages** on page **34**:


✏ **Note** - To help prevent confusion surrounding who to contact if your patients have a problem, we ask that you add the following to your **Prescriptions 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 that displays:

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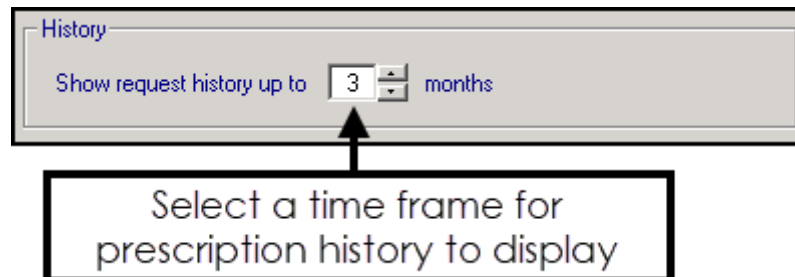
Patient Message

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

- From **Control Panel - Online Services - Prescriptions Configuration - General - Patient Message**, tick **Allow patients to submit a free-text message with their requests**:
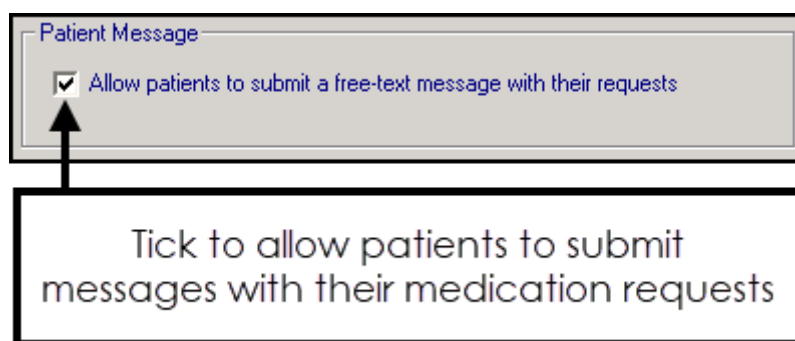
Note - When this option is selected, a warning message displays, advising the practice to ensure that the necessary processes are in place to check any messages entered by the patient.
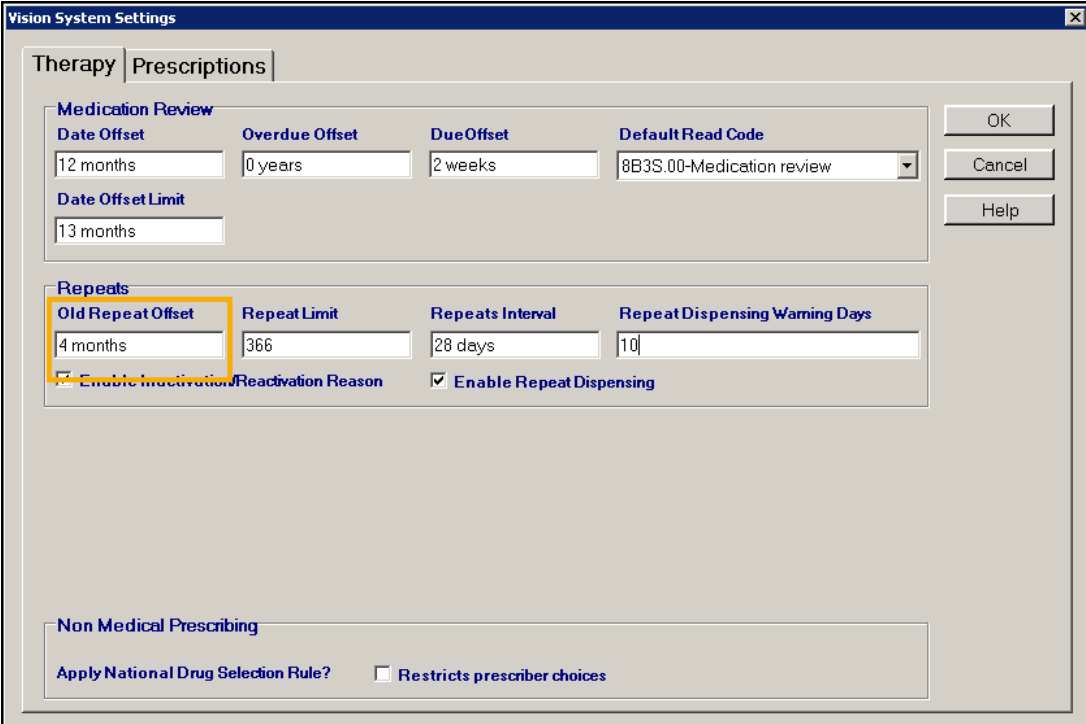
Control Panel - Settings

From **Control Panel** - **Settings** [Settings] :

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 - Settings** [Settings], select the **Therapy** tab.

2. In **Repeats** - **Old Repeat Offset** add a time span, for example, if you select an offset date of '4m', patients can only order repeat prescriptions which have been issued within the last 4 months, you can use *D* for days, *M* for months and *Y* for years here. Repeats not issued within this time display on the **Unavailable** list:

3. Select **OK** to save.

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

Enabling Online Patient Summary

Patient Summary allows you to enable your patients to view a subset of their medical record.

In **Wales**, once enabled, your patients can view their:

- **Allergies** - Drug and non-drug.

- **Medication Issued** - Acutes and repeats (including discontinued repeats).

- **Immunisations** - Only those recorded in the **Immunisations Structured Data Area** (SDA) with a **Status** of **Given** display.

To enable this:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** and the **Vision Online Services** screen displays.

2. Tick **Summary Data** to enable patient access to their summary data.

3. Select **OK** to save.

Enabling Online Detailed Coded Record Access

You can allow your patients access to view their own **Detailed Coded Record (DCR)** using their online service account:

✏️ **Note** - Your patients can only see the coded aspect of their record, free text and comments are not available to view at this time.

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1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** 📤 **Online** and the **Vision Online Services** screen displays.

2. Tick **Detailed Coded Record** to enable the first level of DCR consent.

3. Select **OK** to save.

Enabling Online Demographic Access

Providing they are registered for online services, you can allow your patients to view and/or update certain aspects of their demographic information. This is designed to save administration time within your practice.
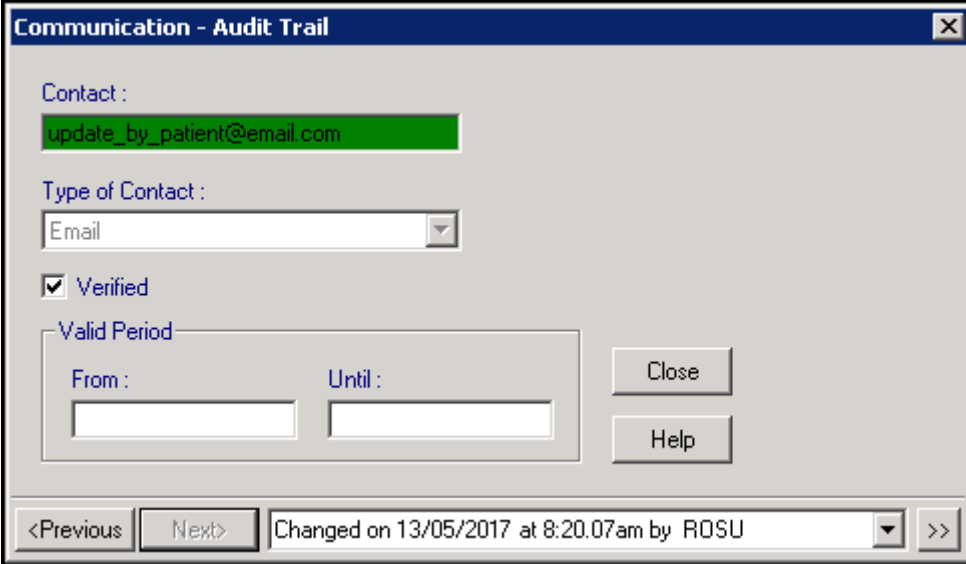
To enable this facility:

1. From **Vision 3 - Management Tools**, select **Control Panel - File Maintenance - Online Services** ![Online] and the **Vision Online Services** screen displays.

2. Under the **Demographics** section, select from:

   - **View** - Tick to enable your patients to view their own:
     - **NHS Number/CHI Number/H+C Number**
     - **Full Name**
     - **Date of Birth**
     - **Gender**
     - **Marital Status**
     - **Usual GP** (title, first name and surname)
     - **Main Address**
     - **Email** (preferred)
     - **Telephone Numbers** (latest recorded mobile and home number)
     - **Ethnic Category** (latest recorded)
     - **Branch Surgery attended** (determined by the Notes kept at option in the patient's Registration record)

   - **Auto Update** - Tick to enable your patients to be able to update their own:
     - **Home phone number**
     - **Verified mobile number**
     - **Preferred email address**
     - **Preferred Spoken Language**
     - **Preferred Written Language**

3. Select **OK** to save.

The audit trail shows the update has been made by ROSU, indicating a patient submitted amendment:
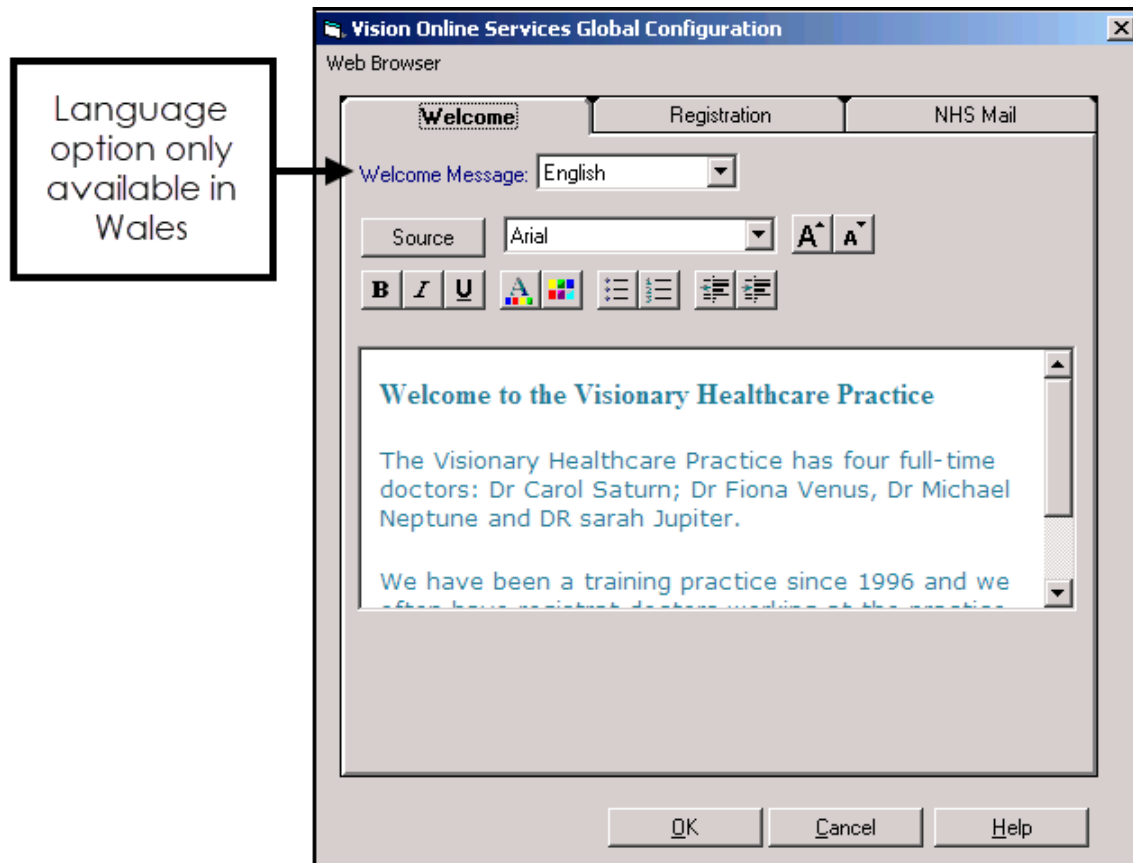
Patient Online Services Configuration Utilities

You can edit and format patient messages as follows:

- **Using the Message Editor** on page **32**
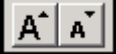- **Formatting HTML Messages** on page **34**

Using the Message Editor

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

Enter your message in the **Welcome Message** screen using the following formatting:

- **Welcome Message** (Wales only) - Select a language for this version, remember you should be adding both an English version and a Welsh version.

- **Source** - 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. See **Formatting HTML Messages** on page **34 for details.**

- **Font** - Allows you to change the font.

- **Font size** - Allows you to increase and decrease the text size of the highlighted text.

- **Bold, Italic, Underlined**.

- **Text colour/ Background colour**.

- **Bulleted/numbered list**.

- **Decrease/increase indent**.

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 do not display on the website.

Formatting HTML Messages

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

- Used either side of a keyword you wish to format.

- The tag always has angle brackets, denoting the starting and closing of the tag, for example, <html>.

- HTML tags normally come in pairs, for example, (the starting tag) and (the closing tag).

- You can use multiple tags, but each tag must have brackets at the start and end of the tag, for example, <p>.

This is a list of the most common codes:

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

For example, applying the bold tag to the 1st line of the message like this:

- Welcome to the Visionary Healthcare Practice

Displays as:

- **Welcome to the Visionary Healthcare Practice**