

DLM 320 User Guide

All Countries:

Consultation Manager

Registration

Search and Reports

England:

Personal Demographic Service 3

Electronic Prescription Service Release 2

Role Based Access Control

Single Sign On (SSO) Changes

Wales:

Welsh Clinical Communications Gateway (WCCG)

Scotland:

GP10(ss)(5) Stationery

SCI Pathology Changes



Table of Editions and Contents

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| 11/08/2010 | DLM320 - 2699 | Core changes and integrated projects. ESTU. | PDF |
| 24/08/2010 | DLM 320 - 2710 | SCI Path Batch header fling details. | |
| 26/08/2010 | DLM 320 | Pathology Removal utility now not included in DLM 320 as per JJAF. | PDF |
| 22/09/2010 | DLM 320 | General reorganise. | PDF |
| 28/09/2010 | 320 | Assign Smartcard. | PDF |
| 22/11/2010 | 320 | Login from offline to SSO and general reorganise. | PDF |
| 26/11/2011 | 320 v004 | VOS Report Entity, Unexpanded Dosage search, Choose and Book By Proxy. | PDF |
| 28/03/2011 | 320 v005 | Design changes. | PDF |
| 31/03/11 | 320 v006 | Further design changes. | PDF |
| 16/05/2011 | 320 007 | AF and Drug Preparation changes | PDF |

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DLM 320

DLM 320 – Summary of Changes

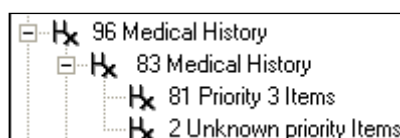
This core user guide lists changes and enhancements to existing Vision software delivered in DLM 320. The following projects are also part of DLM 320.

- Personal Demographics Service (PDS) Version 3.
- EPS Release 2 – Phase 3 (Deployed Disabled) for existing EPS Release 1 users. Full EPS Release 2 functionality is currently being piloted.
- Role Based Access Control (RBAC) Version 27.
- Welsh Clinical Communications Gateway (WCCG).

User guides for these projects can be found on the User Assistance DLM page at http://www.inps4.co.uk/my_vision/vua/dlm/index.html

Consultation Manager

- **Preparation changes for some therapy items** - From DLM 320 some therapy items in the Multilex drug dictionary will use dm+d terminology. This means a change to preparations for a small number of therapy items.
See “[dm+d Terminology for some Drugs](#)” on page 5.
- **Assorted Flavour Option** - For relevant generic items, a new AF (Assorted Flavours) check box is available from Therapy - Add. When selected, the prescription is endorsed with “Assorted Flavours”.
See “[Assorted Flavour Endorsement](#)” on page 7.
- **Unknown Priority Filter** – There is now an “Unknown” priority filter which allows you to view medical histories which do not have a priority. This is pertinent to entries where the priority has been deleted, certain GP2GP transfers and some medical histories converted from your previous GP system.



Note – In DLM 320 unknown priorities display in all priority filter views. For DLM 321, we have decided to change this so that they are only filtered in the Unknown filter.

See “Unknown Priority Filter” on page 5.

- There is a new SDA entity for **Other Lab Result Information** categorised under Other Pathology Tests.
- **CV/BP Consultation Read code changes** – from DLM 320, 66f.00 Cardiovascular disease monitoring is the new default Read code the CV/BP Consultation SDA. The other selectable Read codes are:

66f0..00 – Cardiovascular disease annual review

66f1..00 - Cardiovascular disease interim monitoring

66f2..00 - Cardiovascular disease high risk review

662.*-662j*,662o*-662r* are no longer included in the CV/BP Consultation SDA.

See “CV/BP Consultation Read Code Changes” on page 8.

- **Pneumococcal Immunisation Warning** – When adding either Pneumococcal Conjugate Prevenar 13 or Pneumococcal Conjugate vaccines, you are now prompted if there is already entry for either immunisation type. For example if 1st stage Pneumococcal Conjugate Prevenar 13 is already on the patient record then you enter 1st stage Pneumococcal conjugate vaccine, you are prompted “*Pneumococcal conjugate vaccine stage 1 has already been recorded. Do you wish to continue?*” Click **Yes** to continue or **No** to return to the immunisation.
- **HbA1c Graphs** – As you have started to receive HbA1c results using the new mmol/mol units of measure, when a graph was plotted in Consultation Manager both old and new results values were used which distorted the graph display. From DLM 320, Consultation Manager converts any results using % and plots them as mmol/mol so that the graph displays comparable data.

See “Graphs for HbA1c Results” on page 9.

- The Notes for Patient button in Therapy – Add is now called



Additional Information and now has an extra section called **Information for Dispenser**. This allows you to add free text that prints under the drug dosage on the left hand side of the prescription.

See “Additional Information from Therapy – Add” on page 10.

Registration

- **Patient Record Creation in Registration** - From DLM 320, when adding a registration, once you accept the patient details form, a patient record is created. This means that if you cancel the registration after this point, the details are saved.

See ["Registration Record Creation Change"](#) on page 11.

- **Cancelling Registrations** - If you choose to cancel the registration process at the final Registration Details screen, you are now warned that a patient record has already been created for this patient which cannot be deleted.

See ["Cancelling Registrations"](#) on page 11.

Search and Reports

- DLM 320 includes an **Unexpanded Dosage Code search** which identifies potential unexpanded dosage codes within active repeat masters.

See [Unexpanded Dosage Codes](#) on page 12.

- There is a new search entity called **VOS users**. This allows you to search for patients using Vision Online Services (VOS) by registration status.

See [New Search Entity - Vision Online Services \(VOS\)](#) on page 13.

England Changes

Single Sign On

- **Workstation Locking** – From DLM 320, you are now able to lock your workstation when you are logged into Vision with your Smartcard. This is done by either:
 - Removing your Smartcard from the reader.** This will no longer result in a forced Vision shutdown. Instead, the workstation is locked and the Vision modules you are running are frozen until you unlock the workstation.
 - Leaving your workstation inactive.** The Vision screensaver now works with SSO login which means that depending on your settings in **Control Panel – Security**, the workstation will lock after a period of mouse or keyboard inactivity.
- **Logging in from working offline to Single Sign On** – you can now easily swap from working offline to Single Sign On from the front screen of Vision.

See ["SSO Changes"](#) on page 14 for further details.

Control Panel

- **File Maintenance - Assign Smartcard.** You are now able to assign a Smartcard to a Vision user from File Maintenance.
“Assign Smartcard” on page 14 for further details.
- **Security** – There is a new Vision security function for **Choose and Book Referral – By Proxy** added to the Consultation Manager group.

Scotland Changes

- In DLM 320, GP10(SS)(4) Stationery has been replaced with **GP10(SS)(5)**. If you did not change your printer profiles to use the new form, as advised in the DLM 310 user guide, you will need to do so now.
See “Scotland – Introduction of GP10 (SS)(5)” on page 17.
- **SCI Pathology – New Read code**– There is a new SDA entity called **Other Lab Result Information**. This has been created to accommodate incoming SCI pathology messages which use Read codes outside of the bounded Read code list and are not in Read chapter 4 or 5.
See “Other Lab Result” on page 18.
- **SCI Pathology – Batch Header Filing** – From DLM 320, batch headings for single result messages which have the same Read code as the pathology result and have no attached comment, will not be displayed in the message pane or filed into Consultation Manager.

Consultation Manager Changes

dm+d Terminology for some Drugs

When you receive DLM 320, please be aware that there will be changes to some preparation and quantity formats.

This is because we are moving towards using the national dm+d (Dictionary of Medicines and Devices) terminology (see <http://www.dmd.nhs.uk/> for more detailed information). This affects all counties as in future this will be the NHS standard for drug terminology. It is also a prerequisite for Electronic Prescribing Release 2 in England.

dm+d units are simple and adhere to existing standards, so for example where previously the quantity would be expressed as **6 * 250ml bottles**, this would now become **1500 ml**.

Training Tip – If you want to prescribe six 250 ml bottles you can type 6*250 in the quantity box and the quantity is calculated for you.

Some more examples...

| Old | New |
|--------------------|-----------|
| 1 tablet(s) | 1 tablet |
| 1 capsule(s) | 1 capsule |
| 1 mls | 1 ml |
| 1 200 dose inhaler | 200 dose |
| 1 5 metre pack(s) | 5 m |

When you update an existing therapy form, e.g. reauthorise a single item, the new preparation and quantity is used.

Note - You may need to review your practice drug defaults for certain items. Vision system drug defaults have been automatically updated.

To illustrate, the following item was added as a repeat master pre DLM 320. The preparation was previously **5 metre packs** and the default quantity **1**:

Repeat Master - Add

Date Prescribed: 28 March 2011 Prescriber: Dr Fiona Venus

Drug: Scanpor Permeable Non-Woven synth adh tape 2.5cm [BIO-DIAG]

Quantity: 1 Preparation: 5 metre pack(s)

Scanpor Permeable Non-Woven synth adh tape 2.5 cm – preparation in 5m packs

From DLM 320, the preparation is now in **metres**. Note the default quantity has changed to **5**:

Repeat Master - Add

Date Prescribed: 28 March 2011 Prescriber: Dr Carol Saturn

Drug: Scanpor Permeable Non-Woven synth adh tape 2.5cm [BIO-DIAG]

Quantity: 5 Preparation: m

Scanpor Permeable Non-Woven synth adh tape 2.5 cm – Preparation in metres

Note - If you are concerned about how such items are going to be dispensed, you can add a note to the prescription for the pharmacy (see "Additional Information from Therapy – Add" on page 10). The responsibility for what is dispensed lies with the dispenser/pharmacist. They can endorse the prescription with what is actually dispensed i.e. 2x5m or 1x10m.

Assorted Flavour Endorsement

From the Therapy - Add screen, for relevant generic items that has at least one equivalent with a different flavour, the new AF (Assorted Flavours) check box is available. When you select this, the prescription is endorsed with "Assorted Flavours".

The AF (Assorted Flavours) check box is available for selection when you have chosen a generic drug with at least one equivalent with a different flavour.

Patient is allergic to : Simvastatin 20mg tablets, Acacia spray dried powder, Ibuprofen 200mg modified-release
Patient is intolerant to : Warfarin 5mg tablets

Therapy Add - Assorted Flavour Option

Unknown Priority Filter

There is now an "Unknown" priority filter option which allows you to view medical histories which do not have a priority entered. This is pertinent to entries where the priority has been deleted, certain GP2GP transfers and some medical histories converted from your previous GP system.

1. In Consultation Manager, with a patient open, go to the Navigation Pane.
2. Click on next to Medical History to display priority filter options.
3. Select **Unknown Priority Items**.

| Date | Description (Unknown priority Items) | Priority | Clinician |
|----------|--------------------------------------|----------|-----------|
| 08/01/09 | H _a Seen by audiologist | | FV |
| 12/02/08 | H _i Patient given advice | | SJ |

Consultation Manager – Navigation Pane – Unknown Priority

Note – In DLM 320 unknown priorities display in all priority filter views. For DLM 321, we have decided to change this so that they are only filtered in the Unknown filter.

Other Lab Result

There is a new SDA entity for **Other Lab Result Information** categorised under Other Pathology Tests. Scottish practices see "Scotland - SCI Pathology Changes Other Lab Result" on page 18.

Other Lab Result Information - Add [Recall] [OK] [Cancel] [Help]

Date of Test Result: 28 September 2010 Clinician: Dr Carol Saturn Private In Practice

Read Term: Value: Unit of Measure: <None>

Result Qualifier: <None> Notes: Normal Range: From: To: Basis of Normal Range: <None>

New Other Lab Result Information SDA

CV/BP Consultation Read Code Changes

From DLM 320, 66f.00 Cardiovascular disease monitoring is the new default Read code the CV/BP Consultation SDA. The other selectable Read codes are:

- 66f0..00 – Cardiovascular disease annual review
- 66f1..00 - Cardiovascular disease interim monitoring
- 66f2..00 - Cardiovascular disease high risk review

662.*-662j*,662o*-662r* are no longer included in the CV/BP Consultation SDA. This should assist with recall auto-complete issues.

Cv/Bp Consultation - Add [Recall] [OK] [Cancel] [Help]

Date of consultation: 28 September 2010 Clinician: Dr Carol Saturn Private Seen by: In Practice

Read Term: 66f..00 Cardiovascular disease monitoring

Notes:

CV/BP Consultation

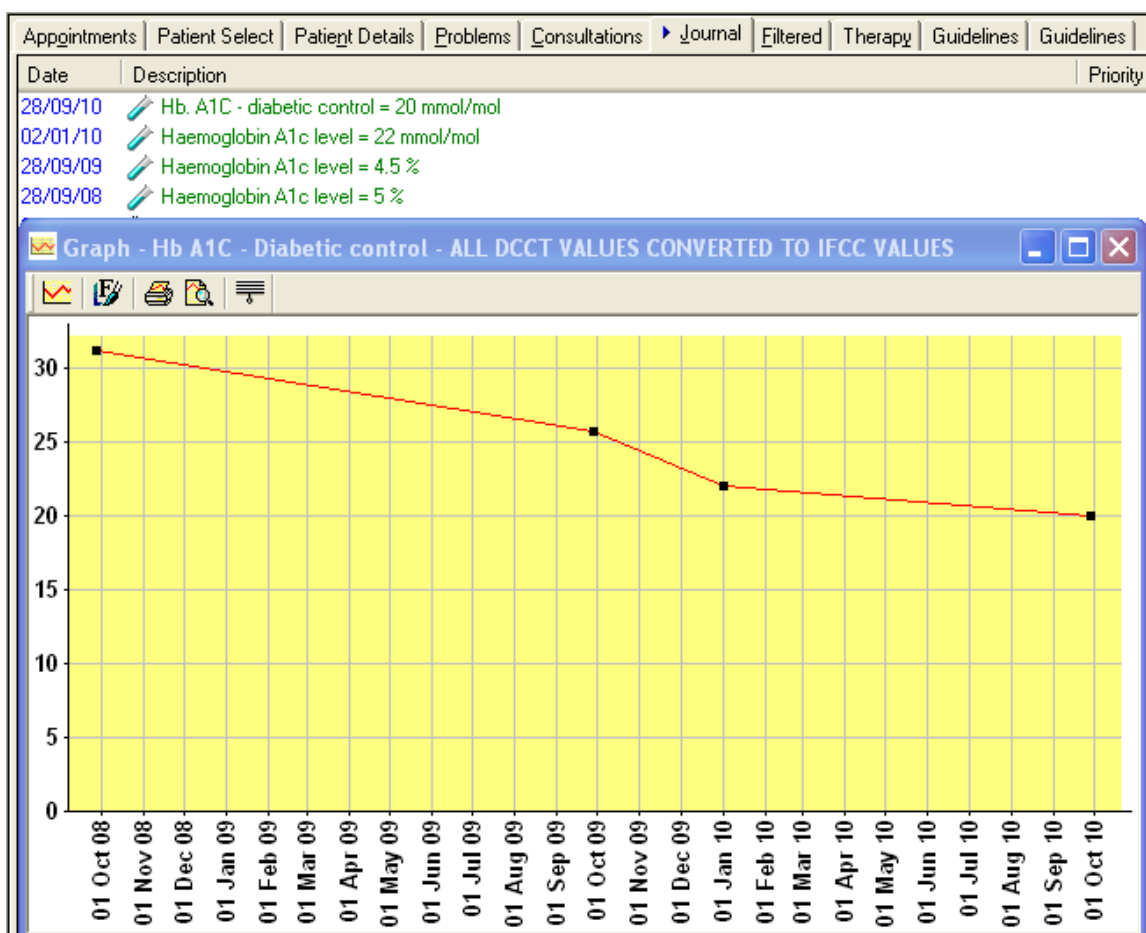
Graphs for HbA1c Results

Previously in Consultation Manager, you were not able to create a graph for HbA1c results which had a mixture of the old DCCT (%) and new IFCC (mmol/mol) values.

From DLM 320, when displaying HbA1c results in graph format, Consultation Manager automatically converts DCCT values (%) to IFCC (mmol/mol) values using the following equation:

$$\text{IFCC-HbA1c (mmol/mol)} = [\text{DCCT-HbA1c (\%)} - 2.15] \times 10.929^1$$

This means that the graph view now displays comparable HbA1c data.




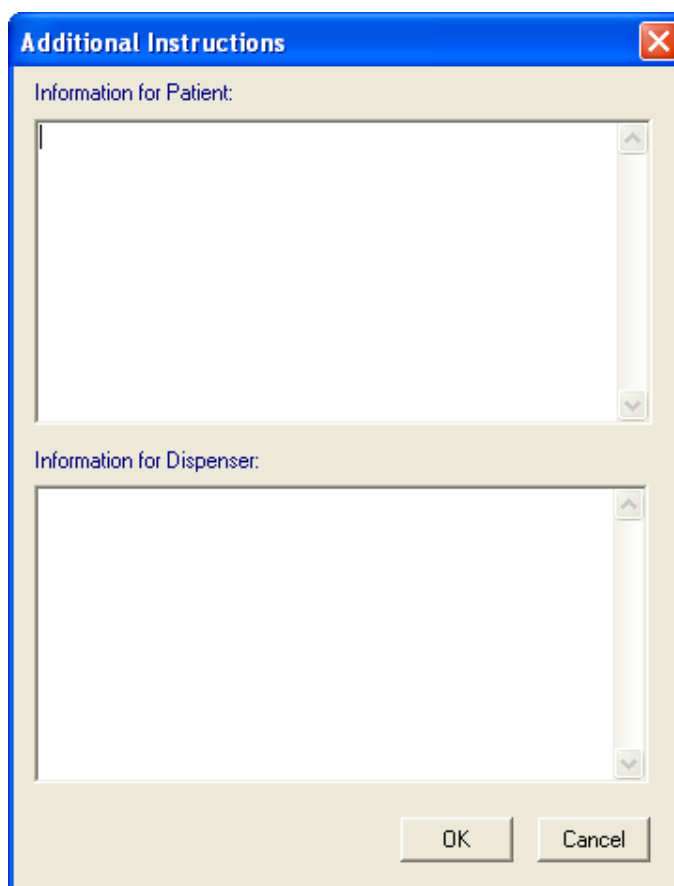
Graph displaying % and mmol/mol HbA1c results

¹ Equation obtained from the Association of Clinical Biochemistry
<http://www.acb.org.uk/docs/HbA1cLabProfessional.pdf>


Additional Information from Therapy – Add

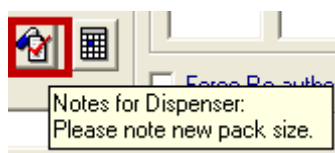
The Notes for Patient button in Therapy – Add is now called Additional Information

 and now has an extra section called **Information for Dispenser**. This allows you to add free text that prints under the drug dosage on the left hand side of the prescription. For English practices using electronic prescribing, these notes are sent as part of the electronic prescription message.



Notes for Patient now Additional Information with Information for Dispenser Section

As with Information for patients, when you exit the form, the Additional Information button is ticked , and if you hover your mouse over the button, a yellow pop-up shows the text you have entered.



On the Journal tab, up to nine lines of the note text are shown with the Therapy entry by the heading *Notes for Dispenser* – if more lines than that, the word MORE... is shown in the right hand column; click on this for the full text.

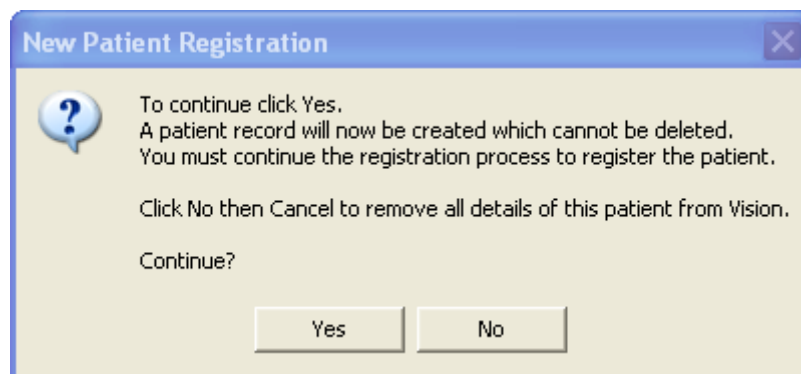
You may need to widen the column to see it in full (click on Dosage heading at column header, then point cursor at dividing line between next column header, and drag this line to increase the column width).

Registration Changes

Registration Record Creation Change

Previously, when adding a registration, you were able to cancel the registration add process at any stage before the final Registration Details screen and no patient record was created. This introduced problems, as an appointment or a prescription could be created for the patient during this short window of time and then the patient record deleted.

From DLM 320, when adding a new registration, once you accept the patient details form, a patient record is created. Before this happens, you are prompted with the following message:

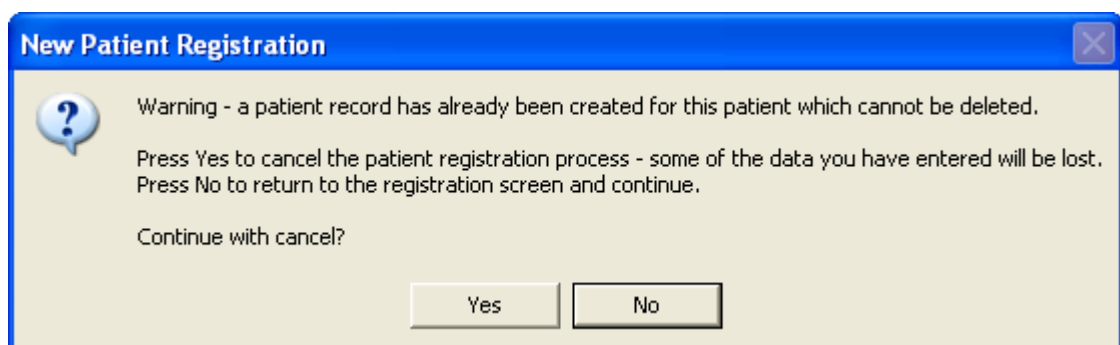


"To continue click Yes. A patient record will now be created which cannot be deleted. You must continue the registration process to register the patient. Click No then Cancel to remove all details of this patient from Vision. Continue? Yes/No"

Cancelling Registrations

If you choose to cancel the registration process at the final Registration Details screen, you are warned that:

"Warning - a patient record has already been created for this patient which cannot be deleted. Press Yes to cancel the patient registration process - some of the data you have entered will be lost. Press No to return to the registration screen and continue. Continue with cancel? Yes/No"



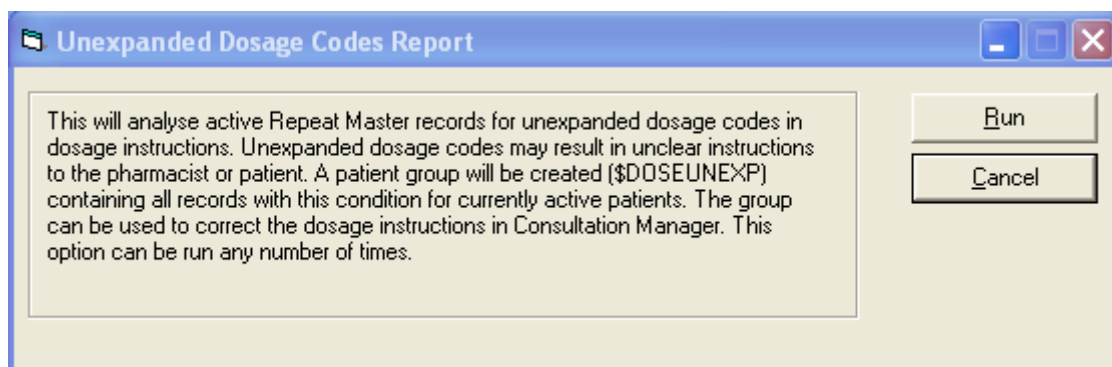
Search and Report Changes

Unexpanded Dosage Codes

In light of electronic prescribing, we have created a report facility to identify repeat masters that may have an unexpanded dosage code eg OD should be expanded to every day. Once the search is run, a group is created called **\$DOSEUNEXP**. You can then either add the group to an adhoc search, or use the Consultation Manager Select Group Patient option to view each patient individually and correct any errors.

1. In Search and Reports, go to **Reports – Unexpanded Dosage Codes...**
2. The unexpanded dosage codes report screen is displayed. You are informed that:

"This will analyse active Repeat Master records for unexpanded dosage codes in dosage instructions. Unexpanded dosage codes may result in unclear instructions to the pharmacists or patient. A patient group will be created (\$DOSEUNEXP) containing all records with this condition for currently active patients. The group can be used to correct the dosage instructions in Consultation Manager. This option can be run any number of times".



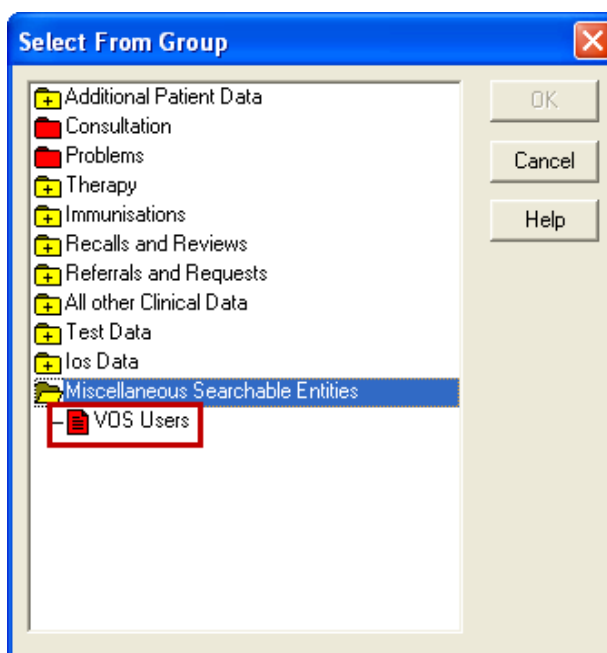
Unexpanded Dosage Code report screen

3. Click **Run** to start the report. If you have previously run the report you are asked
"Patient group 'DOSEUNEXP' already exists. Do you wish to overwrite it? Yes/No"
Click **Yes** to continue.
4. When the report has completed, you are prompted with *"Unexpanded dosage codes report has completed"*
5. Click **OK**.
6. Then, click **Cancel** to close the report. You can now either add the *DOSEUNEXP* group to an adhoc search and print a list of patients, or use the Consultation Manager Select Group Patient option to view each patient individually and correct any errors.

New Search Entity - Vision Online Services (VOS) Users

We have created a new entity called **VOS users** which can be found in the new Miscellaneous Searchable Entities parent folder. This allows you to search for patients using Vision Online Services (VOS) with one of the following registration status:

- **Active** – Patients who are registered for VOS and have active VOS Online Accounts.
- **Created** – Patients have supplied their email address to the Practice, the Online Account has been created and registration letter given to patient.
- **Locked** – VOS Online patients who have locked their accounts, entering the wrong password too many times.
- **Registered** – Patients who have registered for VOS and have created an Online Account, but not activated the account yet.



Select Entity – VOS Users

England Changes

SSO Changes

Workstation Locking

From DLM 320, you are now able to lock your workstation when you are logged into Vision with your Smartcard. This is done by either removing your Smartcard from the reader or leaving your workstation inactive:

Removing Your Smartcard From The Reader.

Removing your Smartcard from the reader without logging out of Vision first will no longer result in a forced Vision shutdown. Instead, the workstation is locked and the Vision modules you are running are frozen until you unlock the workstation (see below how to unlock your workstation).

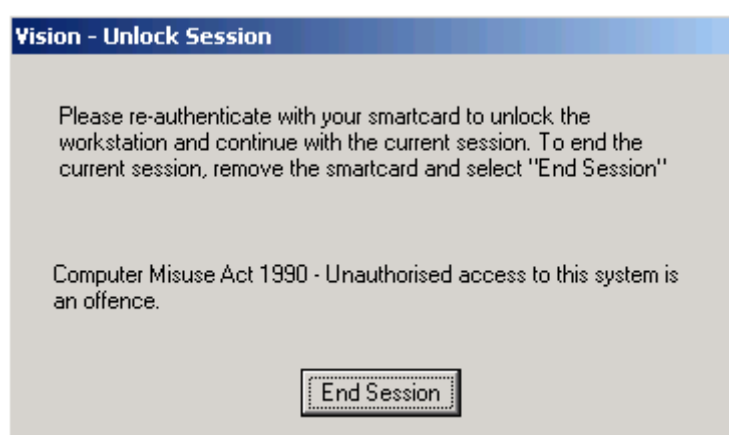
Leaving Your Workstation Inactive.

The Vision screensaver now works with SSO login. This means that depending on your settings in **Control Panel – Security**, the workstation will lock after a period of mouse or keyboard inactivity. Please see Control Panel – Security on-screen help for further details.

Note – If you have disabled your Vision screensaver or timeout setting in Control Panel – Security, your workstation will lock after 30 minutes of inactivity. This is a setting on the Spine Security Broker (SSB) and cannot be changed in Vision.

Unlocking Your Workstation

When your workstation is locked and you move your mouse or type on your keyboard, the Unlock Session screen displays:



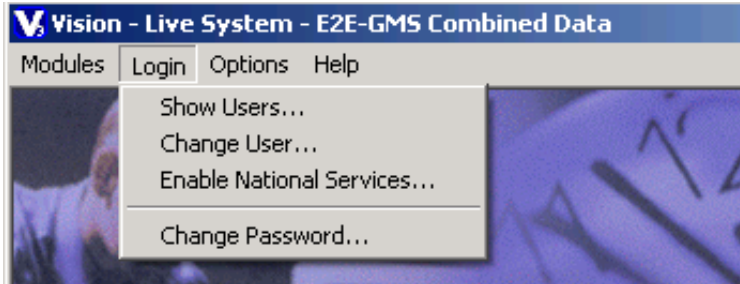
Vision – Unlock Session

To unlock the session you must re-enter your Smartcard and passcode and you will be returned to Vision as it was when it was locked. Alternatively, you can select End Session to close Vision. You are warned that any unsaved work will be lost.

Working Offline to Single Sign On

You can now login with your Smartcard from within a Vision Offline session:

1. Put your Smartcard in the reader and enter your Passcode.
2. From the Vision front screen go to **Login – Enable National Services** (if you have not entered your Smartcard you will be prompted to do so).



Vision Front Screen – Login – Enable National Services

3. On successful sign in, you are prompted that "national services are now enabled".
4. Click OK to continue.

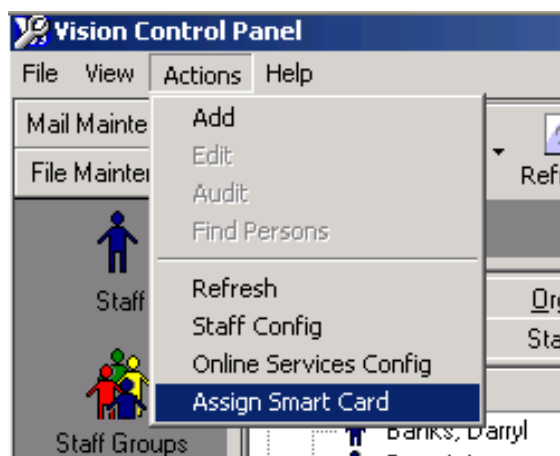
Assign Smartcard

Assign Smartcard is now part of File Maintenance. This was previously accessed from the front screen of Vision and appeared as a prompt for those accessing Vision for the first time with their Smartcard. From DLM 320, only those with access to **Control Panel – File Maintenance** are able to assign Smartcards. You will need the new users Smartcard to do this.

1. In Control Panel, go to File Maintenance.

Note – To assign a Smartcard you must login to Vision Offline. If you cannot remember your offline password please see Control Panel on-screen help for instructions on how to reset your offline password.

2. Next, click on **Actions – Assign Smartcard**.



File Maintenance – Actions – Assign Smartcard

3. Insert the new users Smartcard when prompted and click OK.

4. Enter the passcode for the Smartcard.
5. You are then presented with a list of Vision users. Click on the matching user and press Select. Please ensure that you select the correct user.
6. If the user is not on the list, you can click on Add User... to create a new Vision profile.
7. You are prompted with the following message:
"Warning: If you have used Vision at this practice before, and your name is not in the list, then you are advised to contact the system supervisor if this is the case and NOT create a new user. Continue to create a new user?"
8. A new staff record will be created in File Maintenance – Staff using the available SDS details (mandatory fields are surname, forename, title, sex, role, mnemonic and a unique id). For prescribing, the following is required: GMP Code, Prescriber number, formulary, Supplementary Prescriber flag and Responsible GP.

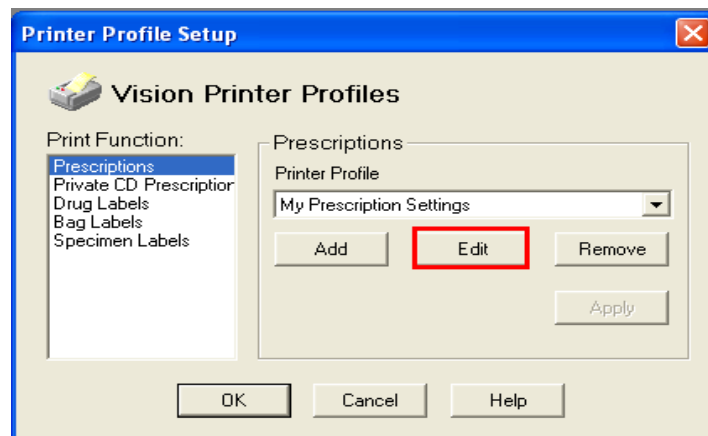
Note – For Locums, an SDS search is performed to obtain their external prescribing number. Where this is not retrieved, you can enter this manually in **File Maintenance – Staff**.

Scotland Changes

Scotland – Introduction of GP10 (SS)(5)

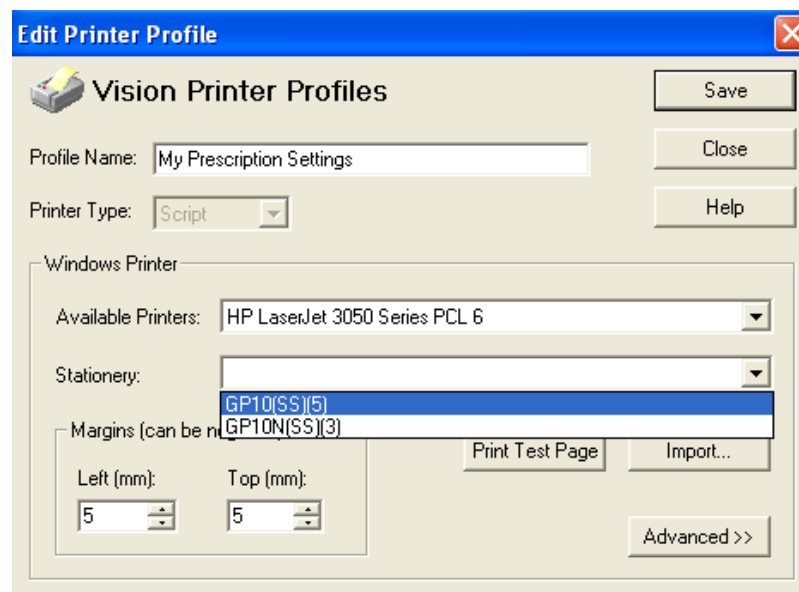
In DLM 320, GP10(SS)(4) Stationery has been replaced with **GP10(SS)(5)**. If you did not change your printer profiles to use the new form as advised in the DLM 310 user guide, you will need to do so now as you will not be able to print prescriptions until this is done. Each prescriber will need to do the following:

1. In Consultation Manager, go to **Consultation – Options – Prescription setup**.
2. In the Prescription Options window, click the **Print Profile** button.
3. In the Printer Profile Setup window, click **Edit**.



Printer Profile Setup

4. From the Stationery box select **GP10(SS)(5)**.



Edit Printer Profile

5. Click **Save**, and then click **OK** at the two following prompts to exit Print Profile Setup.

Scotland - SCI Pathology Changes

Other Lab Result

The new SDA entity "Other Lab Result Information" is introduced on DLM 320. This Read code accommodates incoming SCI pathology messages which use Read codes outside of the bounded Read code list and are not in Read chapter 4 or 5.

Other Lab Result Information - Add Recall OK Cancel Help

Date of Test Result: 28 September 2010 Clinician: Dr Carol Saturn Private In Practice

Read Term: Value: Unit of Measure: <None>

Result Qualifier: <None> Notes:

Normal Range From: To: Basis of Normal Range: <None>

New Other Lab Result Information SDA

Batch Header Filing

From DLM 320, batch headings for single result messages which have the same Read code as the pathology result and have no attached comment, will not be displayed in the message pane or filed into Consultation Manager.