

# DLM 340 Core User Guide

Search and Report Enhancements – Phase 1

Immunisations



### Table of Editions and Contents

<b>Date</b>	<b>Version</b>	<b>Contents</b>	<b>Output</b>
18/02/2011	001	S&R enhancements, Imms and PostgreSQL installation	
14/06/2011	002	Removal of PostgreSQL installation from this DLM	
27/07/11	003	Reference added in Patient Report section	Docx & PDF

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# Contents

<b>DLM 340</b>	<b>1</b>
<b>Summary of Changes</b>	<b>1</b>
<b>Search and Report Enhancements – Phase 1</b>	<b>2</b>
Sharing Ad Hoc Searches	2
Exporting	2
Exclusions for Export:	5
Importing	2
Searching for Changes	4
Report Output Changes	5
Patient Report – Date From	6
Patient Report Criteria	7





# DLM 340

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## Summary of Changes

14/06/2011

### Immunisations

- **Change to Childhood Immunisation Schedule** – as per the recommendation by the Department of Health, we have updated the immunisation schedule so that the following vaccinations are now given together at one visit between the ages of 12 to 13 months:
  - Measles, Mumps & Rubella – 1<sup>st</sup> stage
  - Pneumococcal conjugate – 3<sup>rd</sup> stage
  - Haemophilus influenza B – 4<sup>th</sup> stage
  - Meningococcal C – 3<sup>rd</sup> stage
- **Diphtheria/Tet/Pert/Polio/Haemophil Booster** – We have changed the Read code for Diphtheria/Tet/Pert/Polio/Haemophil Booster from #65a to **#65a3.00**.

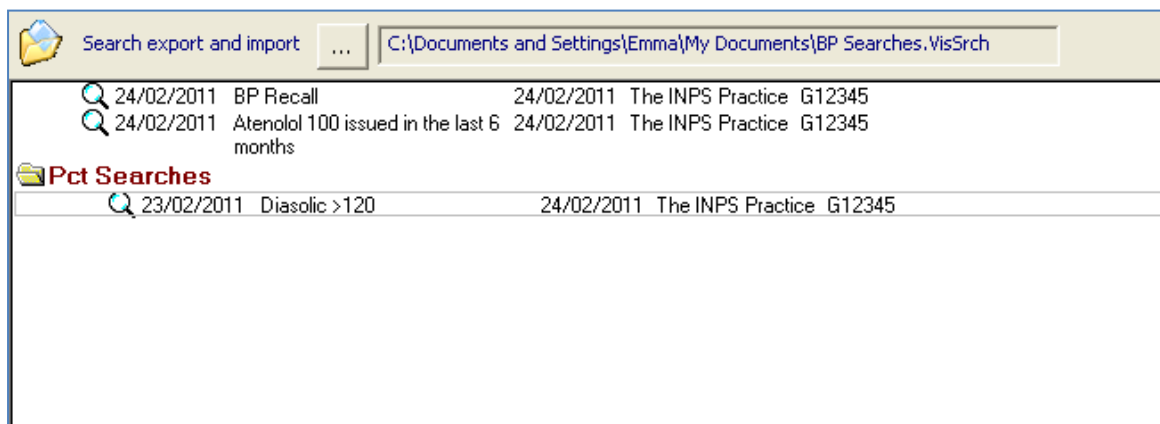
### Search and Reports Enhancements – Phase 1

- **Share Ad Hoc Searches** - From DLM 340, you can now share ad hoc searches (including batch searches) via the new Export and Import pane in the Search and Reports module. See "[Sharing Ad Hoc Searches](#)" on page 2.
- **Searching for Changes** – we have added a new attribute called **Modified** to every search entity. This allows you to search for entities that have been changed. See "[Searching for Changes](#)" on page 4.
- The **Vision Identifier** and **Modified** attributes can now be added to Patient Print Format for the Summary and Standard Report Outputs. See "[Report Output Changes](#)" on page 5.
- **Patient Reports - Date From** – You can now input a Date From when printing from the Patient Reports screen. See "[Patient Report - Date From](#)" on page 6.
- **Scotland only** – CMS Registration report now includes the pharmacy telephone number.

## Search and Report Enhancements – Phase 1

### Sharing Ad Hoc Searches


From DLM 340, within the Search and Reports module, there is a new Search Export and Import pane which allows you to share ad hoc searches, including search batches, with other Vision 3 practices.

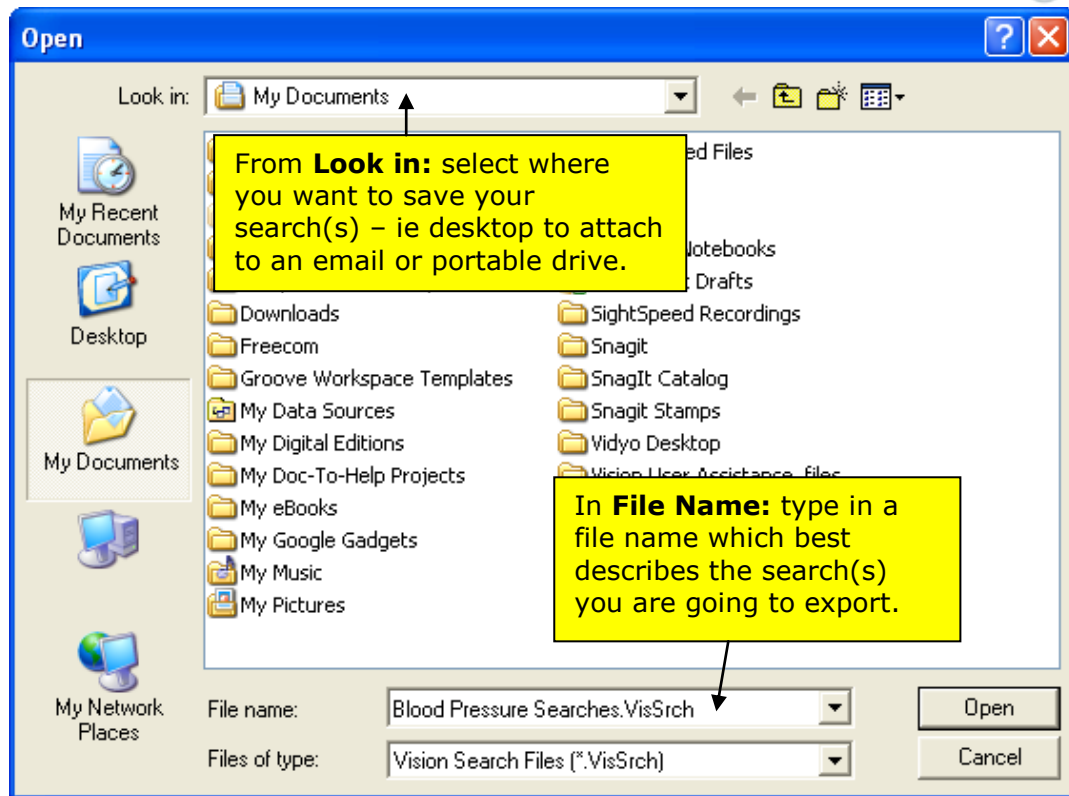


*Search export and import section*

### Exporting

To export one or multiple searches, you must first create an export file, you can then place the required search(s) in the export file and share:

1. In **Search and Reports**, go to the new Search Export and Import pane.
2. Click , the **Open** screen is displayed.
3. From the **Look in:** list, select the destination of the file you are creating from the available list, ie the drive letter of your data stick or a local drive if you want to attach the file to an email. VES practices can navigate to their local machine.
4. In **File Name** type in a file name which best describes the search(s) for export. You can also select an existing .VisSrch file and add additional searches.

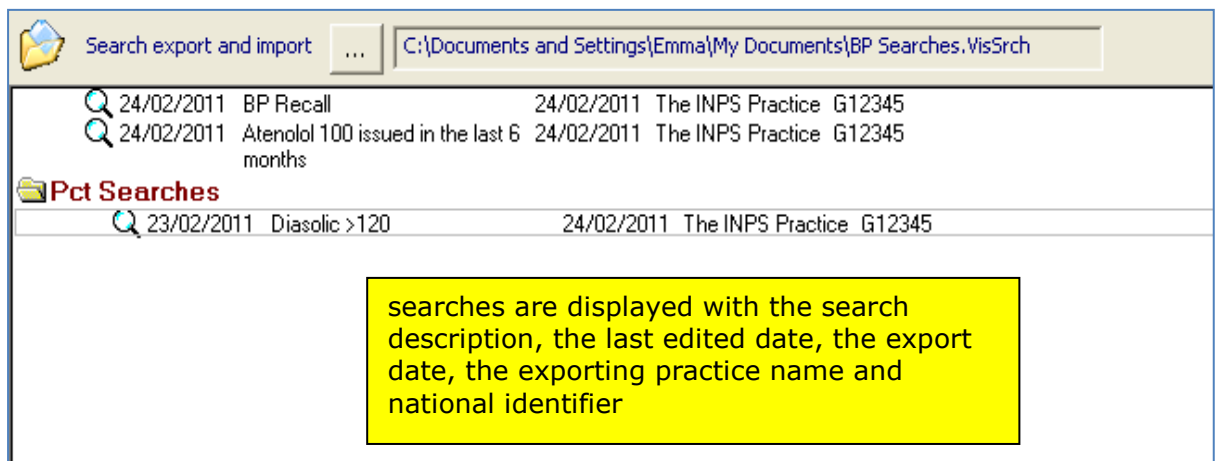


Example Open screen with Look in and File name highlighted

5. Click **Open** to create the file. The file extension name is .VisSrch.
6. Next, add the searches to the file. There are two options for export:

#### Export from the Ad-hoc Search and Reporting List

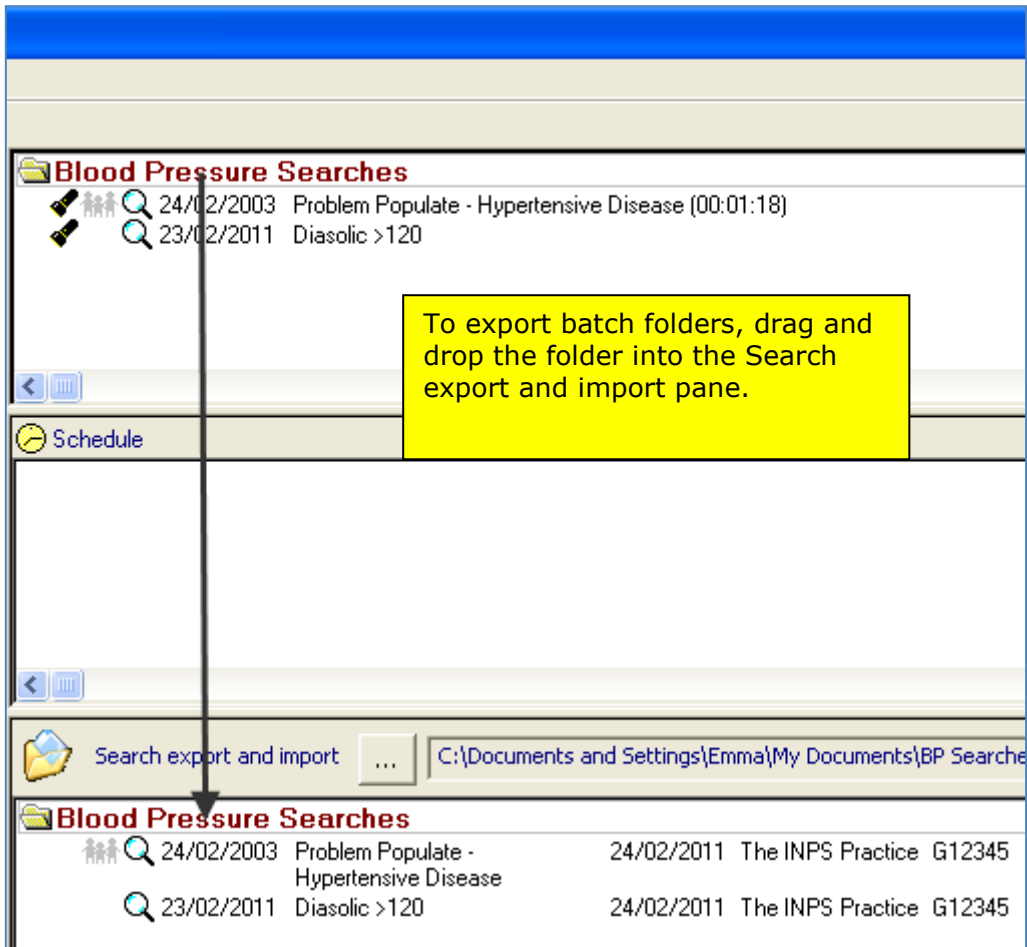
From the reporting list, right click and select **Export**, or drag and drop into the Search export and import section.



Search export and import section with batch and individual searches

#### Export From the Batch Folder List

Drag a batch folder from the **Batch** section of the **Search and Reports** screen and drop it into the **Search export and import** section. You can also drag and drop individual searches from the batch folder.



*Add a batch folder to the Searches export and import pane*

Points to note about exporting batch folders:

- Searches can be duplicated across batches, you cannot have duplicate ad-hoc searches in your export file.
  - Batch folder names can be duplicated in the Search and Report module, however, you cannot export batch files with the same name, even if they do contain different searches, in the same export file.
  - Batches can contain other types of reports as well as ad-hoc searches, but you will be informed that these reports have not been included for export.
7. Your searches are now included in the .VisSrch file (see “[Exclusions for Export:](#)” on page 5) and can be imported elsewhere. Please make sure you have completed your export before taking a copy of the file or moving it.



## Exclusions for Export:

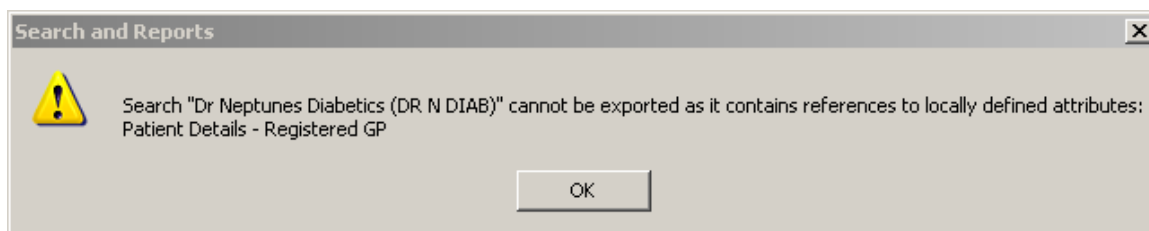
All searches are validated before they are exported. They will not be exported if they contain the following attributes:

### Local Names/Organisations

You cannot export searches with criteria that contain the following organisational/practice specific attributes:

- Clinician
- Authoriser
- Operator
- GP
- Hospital
- Department
- Person
- PCT
- TP
- HB
- Insurance

If one of the above criteria is found in a search, a message displays detailing the attribute: *"Search"nnnn" cannot be exported as it contains references to locally defined attributes: Patient Details - Registered GP".*



*Example of an Export Validation failure message*

### Group Input

Group Inputs are not exported as part of the Search **unless**:

- They are part of a Batch where the Group Input search derives from the group output of another search included in the Batch.
- They are selected from a Clinical Audit line. If the receiving practice does not have the corresponding Clinical Audit with the group, they are prompted to amend the search.

When a group is stripped from the search before export, you are prompted with the following *"Search "nnnn" has local input group "nnnn" which has been removed on exported version"*


### Custom Report Formats

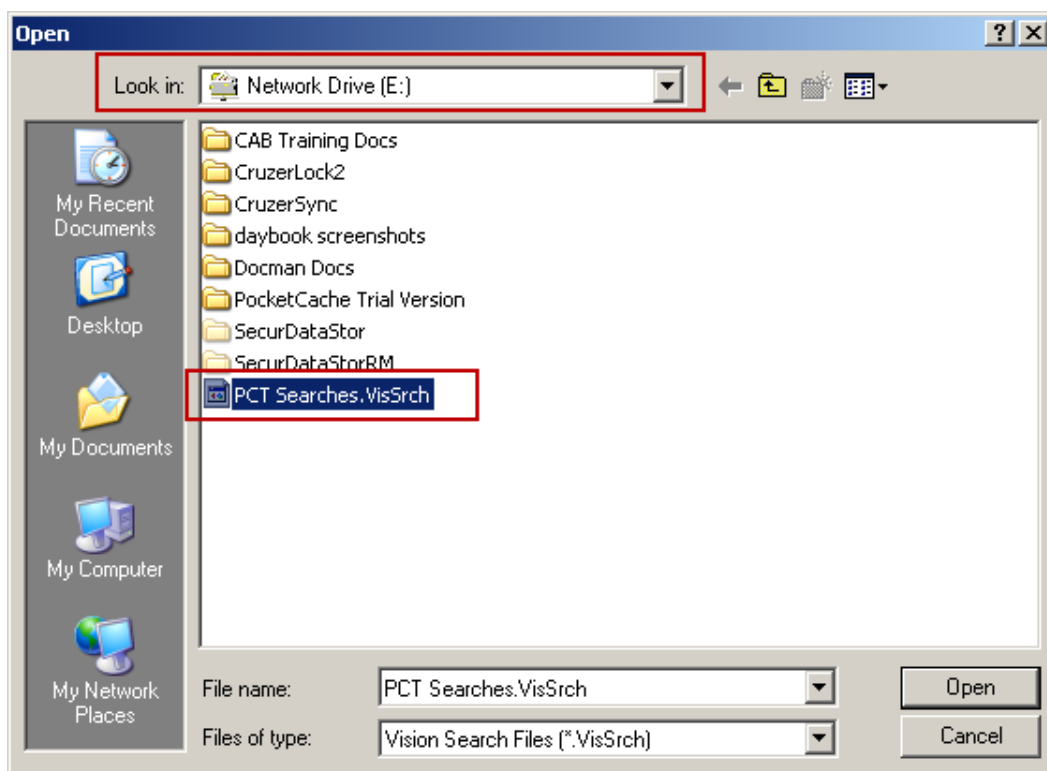
Custom Report Formats are also not exported with searches.



## Importing

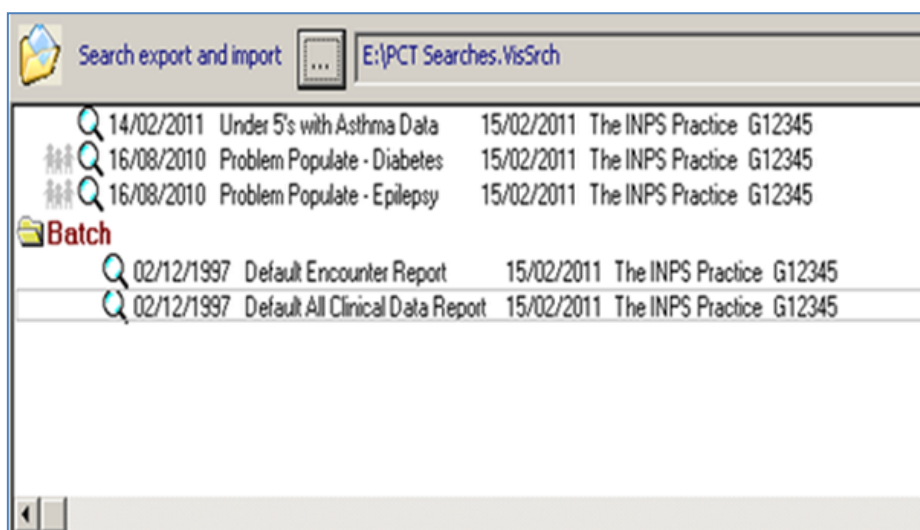
To import one or multiple searches, you must first locate the saved .VisSrch import file (ie, from disk, portable device, email), you can then place the required search(s) into your ad-hoc search and reporting list:

1. In **Search and Reports**, go to the new Search Export and Import pane.
2. Click , an **Open** screen is displayed.
3. In **Look in:** select the source of the files you are importing from the available list (ie the drive letter of your data stick, your desktop after saving it from an email attachment etc). VES practices can navigate to their local machine.
4. Select the required .VisSrch file, click **Open**.



*Open screen with Look in and a .VisSrch file highlighted*

5. The selected file opens in the **Search export and import** section of the **Search and Reports** screen, with all the included searches listed.

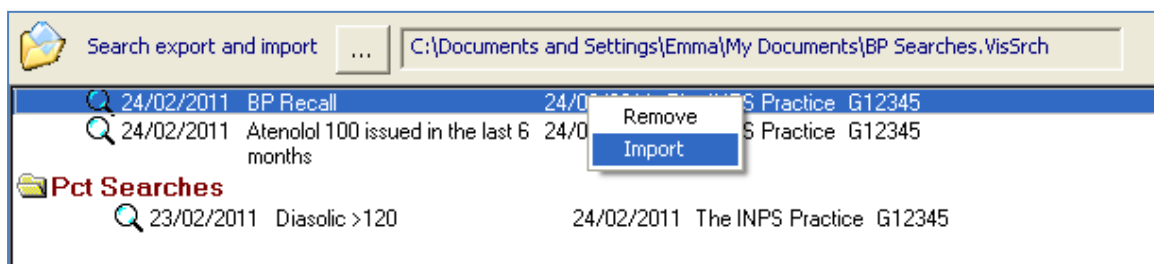


Example of expanded .VisSrch file

- You can now import the searches into Vision. There are two options for Import:

#### Import Individual Searches

From the **Search export and import** pane, right click on a non-batch search and select **Import** or drag the search and drop it in the Ad-hoc Search & Reporting list.



Right click - Import

#### Import Batch Searches

From the Search export and import pane, right click on the batch folder and select Import, or drag and drop the batch folder into the **Ad-hoc Search and Reporting** list. The folder displays in your batch searches pane.

**Note** - You cannot import an individual search from a batch folder.

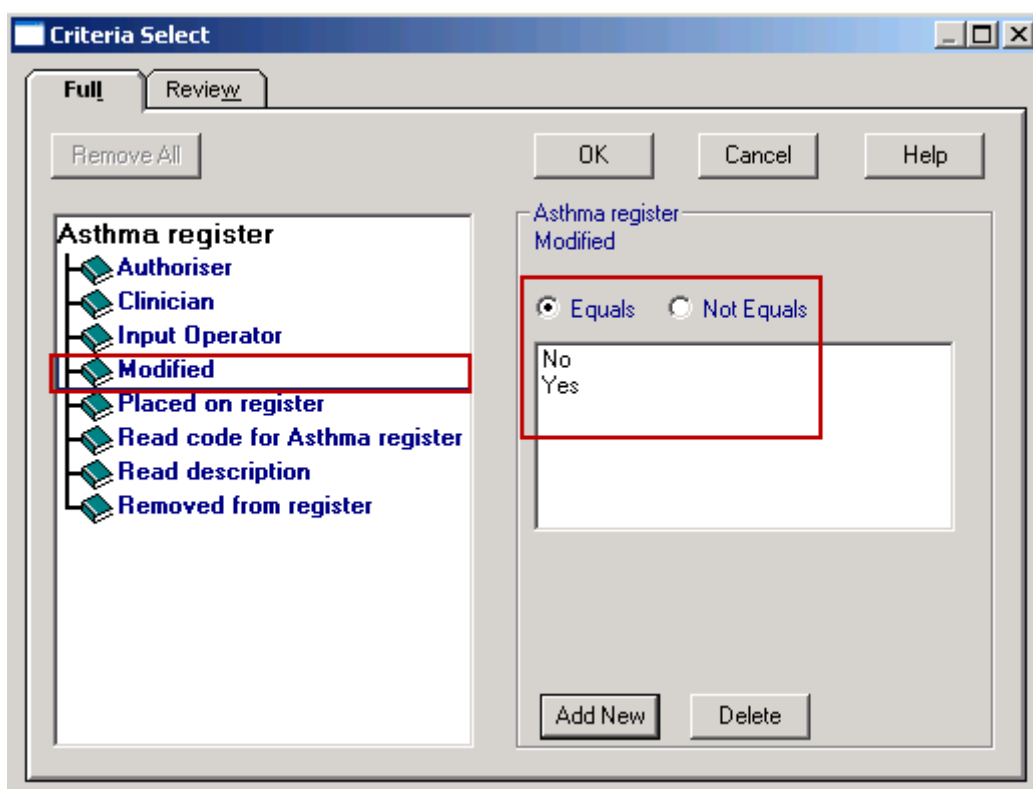
- You can optionally change the name of the search or batch file before they are saved if required.
- Click **OK** to save. If the file name already exists you are prompted "There is already a search named nnnn Please enter a unique name."

The searches are displayed in your Ad-hoc Search and Reporting list and any batch folders are displayed in your batch folder pane.

## Searching for Changes

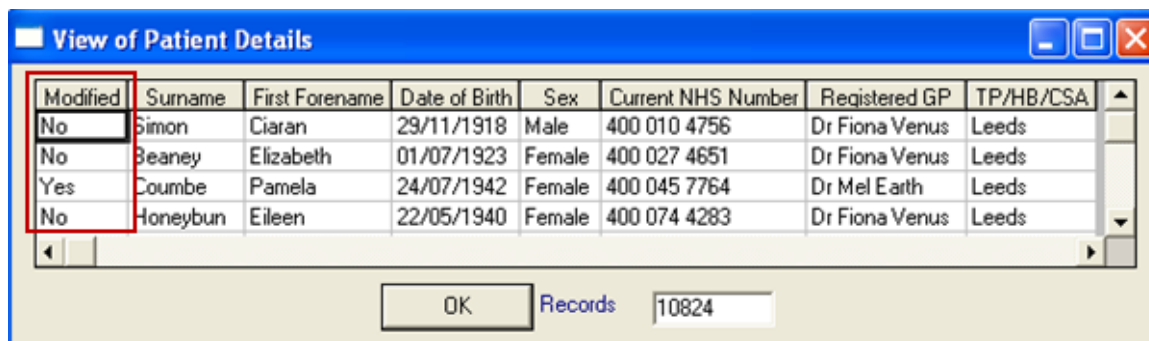
We have added a new attribute called **Modified** to every search entity. This allows you to search for entities that have been changed.

- **Equals Yes** – searches edited items only.
- **Equals No** – searches unedited items only.



*Criteria Select with Modified and its options highlighted*

There is also a Modified column in the Report Output – View screen. You can add the Modified attribute to the Print Format for Summary and Standard Reports. See "" on page .



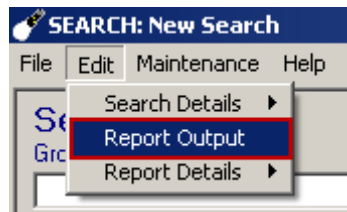
Modified	Surname	First Forename	Date of Birth	Sex	Current NHS Number	Registered GP	TP/HB/CSA
No	Simon	Ciaran	29/11/1918	Male	400 010 4756	Dr Fiona Venus	Leeds
No	Beaney	Elizabeth	01/07/1923	Female	400 027 4651	Dr Fiona Venus	Leeds
Yes	Coumbe	Pamela	24/07/1942	Female	400 045 7764	Dr Mel Earth	Leeds
No	Honeybun	Eileen	22/05/1940	Female	400 074 4283	Dr Fiona Venus	Leeds

*Report Output – View, Modified column highlighted*

## Report Output Changes

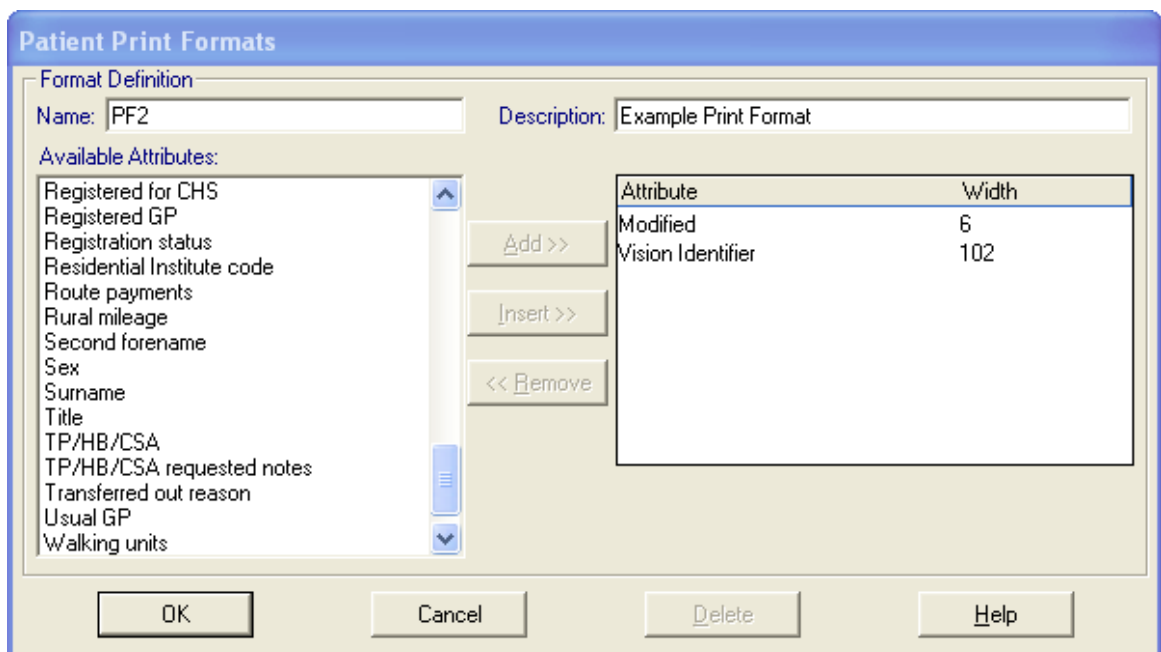
The **Vision Identifier** and **Modified** attributes are now available to be added to Patient Print Format for the Summary and Standard Report Outputs.

1. In a Search, go to **Report Output**, select either **Summary Report** or **Standard Report**.
2. Go to **Edit - Report Output**.



*Edit menu with Report Option highlighted*

3. From **Report Format - Patient Format**, select the format you want to change or click **New Format** (for New Format, you must enter a name and description).
4. Select the required attribute (ie Modified or Vision Identifier) from the **Available Attributes** list. Click **Add>>** to add the new attribute to the end of the print list or **Insert>>** to add the new attribute one above the attribute highlighted.




*Patient Print Formats with Vision Identifier added*


5. Click **OK** to save.

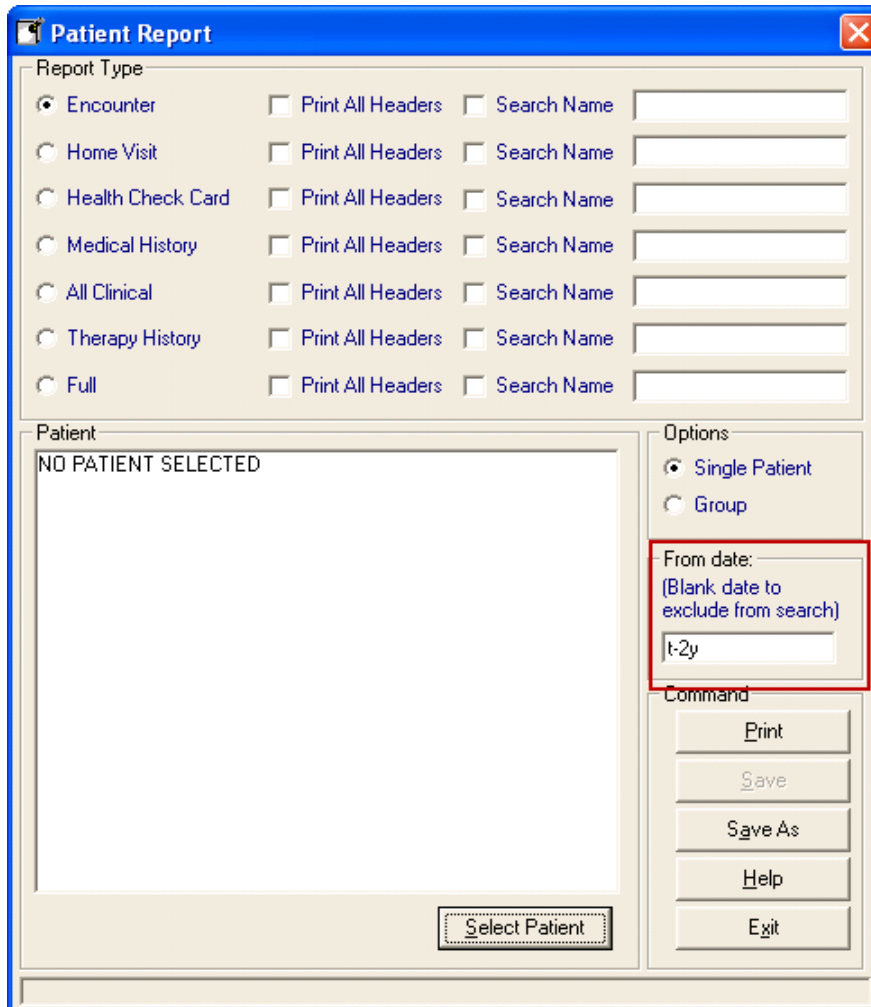
**Note** – You cannot change the default patient print format.



## Patient Report – Date From

We have now included an optional **Date From** box in the Patient Reports  screen. This allows you to apply a from date to certain entities (see “[Patient Report Criteria](#)” on page 7):

1. From **Reporting - Search and Reports**, select Patient Reports .
2. Select the **Report Type** you require.
  - You cannot enter a Date From if you have selected the Search Name option as this uses criteria from your specified search.
  - If you leave the Date From blank, the Report reverts to its default settings.
3. Click into **From date** and set the date range required ie **t-2y** for records with in the last 2 years.



**Patient Report**

Report Type

Encounter  Print All Headers  Search Name

Home Visit  Print All Headers  Search Name

Health Check Card  Print All Headers  Search Name

Medical History  Print All Headers  Search Name

All Clinical  Print All Headers  Search Name

Therapy History  Print All Headers  Search Name

Full  Print All Headers  Search Name

Patient

NO PATIENT SELECTED

Options

Single Patient

Group

From date:  
(Blank date to exclude from search)

t-2y

Command

Print

Save

Save As

Help

Exit

Select Patient

*Patient Report – From Date*

4. Select your patient or choose the group you would like to report on.
5. Click **Print** and select from Printer, File or Window.



## Patient Report Criteria

The following table lists each report type and entities. It shows the entities that the **Date From** option affects and the entities that are date restricted by default and cannot be changed. **Note** – Recalls are included by their Recall Date NOT the Event Date.

Report Type:	Data the Date Option is applied to:		Data that is already date restricted and therefore unaffected by new date option:
Encounter	Problems Therapy Allergies – Drug Allergies – Non-Drug Allergies – No History Hypertension Register CHD Register Stroke Register Diabetes Register Asthma Register Epilepsy Register	Medical History Consultations Blood Pressure Referrals Cervical Cytology Smoking Alcohol Weight Height Contraception Immunisations	Tests (Within 6 months) Recalls (due by today) Repeat Therapy (Within 1 year)
Home Visit	Problems	Consultations	Repeat Therapy (Within 1 year)
Health Check Card	Blood Group Allergies – Drug Allergies – Non-Drug Allergies – No History Problems	Cervical Cytology Contraception Blood Pressure Weight Height	Recalls (due by today) Immunisations (due by today) Repeat Therapy (Within 1 year)
Medical History	Medical History		
All Clinical	Problems Referrals All Other Clinical	Free text Tests	
Therapy History	Therapy		
Full	Problems All Other Clinical Repeat Therapy Acute Therapy Recalls	Consultations Referrals Immunisations Tests	