

User Enhancements

Release 1

INPS



INPS

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09/04/10	0004	Updates to Patient Merge, What's New added.	Docx & PDF
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11/05/10	0006	Update GP Analysis with screenshots	
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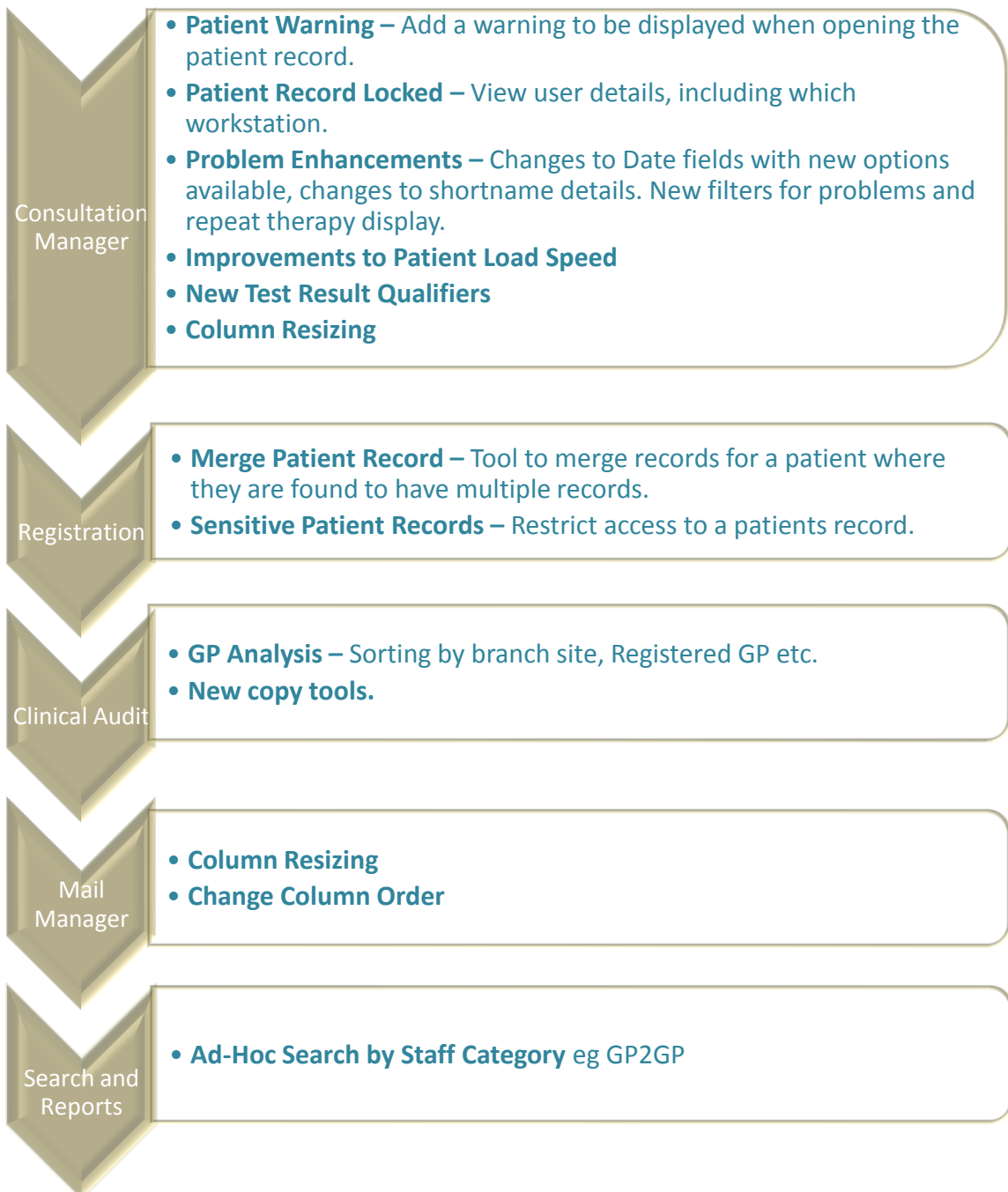
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User Enhancements - What's New

Following discussions with Vision Users, a considerable number of suggestions have been made on ways to improve Vision. This document contains details of the first release of User Enhancement changes. There are a number of completely new functions, and changes have been made to existing elements of Vision to improve and enhance their performance and usability.

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Summary of Changes

Consultation Manager Enhancements

- **Patient Warning** – A Patient Warning icon has been added to the toolbar in Consultation Manager. This tool enables you to add a warning, which will then be displayed each time the patient is selected in Consultation Manager and Appointments. This warning can be initially hidden using the Discreet Display option, which allows you to choose to view the warning when selecting the patient's record. Security restrictions have been added to enable you to manage how this function is used. See [Patient Warning](#) on page 4
- **Patient Record Locked** – When opening a patient's record; if the record is already in use, a Warning Message will be displayed. This message has now been updated to include details of which user has the record open, the workstation and the time the record was locked. See [Patient Record Locked](#) on page 8
- **Problem Enhancements** – Changes have been made to the problem date fields; new date options are available when manually adding a problem. Also you can now set a default date, eg date of consultation, using the Consultation Manager Setup options. The problem short name is no longer mandatory and can now be generated automatically. There are two new buttons available when viewing problems. One filters active problems, the other button enables you to filter repeat issue records in the problem. See [Problem Enhancements](#) on page 9
- **Optimisation for Loading Patients** – In Consultation Manager Setup Options you can now select to load Patient Data from index. See [Optimisation for Loading Patients](#) on page 14
- **Test Result Qualifiers** – See [Test Result Qualifiers](#) on page 16 for further details
- **Column Resizing** – See [Column Resizing](#) on page 17

Registration Enhancements

- **Merge Patient Record** – This is a Registration tool to enable you to merge the clinical data from a duplicate record (usually an inactive patient record) to an active record. Security restrictions have been added to enable you to manage who has access to this function. This tool is available in **Registration – Action – Merge Patients**. See [Merge Patient Record](#) on page 18
- **Sensitive Patient Records** – It is now possible to restrict access to particular patient records, for example, when a member of staff is also a patient. Security restrictions have been added to enable you to manage access to this function. See ["Sensitive" Patient Records](#) on page 29

Clinical Audit Enhancements

- **GP Analysis** –The GP Analysis tab is a tool which enables you to sort existing data by certain fields, eg registered GP, or by branch surgery, (this requires the use of “Notes Kept at” in Registration). See [GP Analysis](#) on page 34
- **New Copy tool** - There is now a facility to copy data grids or patient lists directly to the windows Clipboard. See [Copy Function](#) on page 43

Mail Manager Enhancements

- **Column Resizing** – You are now enable you to resize the columns in Mail Manager. See [Column Resizing](#) on page 44
- **Change Column Order** – You can now drag and drop columns to change the order. See [Change Column Order](#) on page 45

Search and Reports Enhancements

- **Search and Reports** – An extra feature has been added to enable searching by staff category. See [Ad-hoc Searching – Criteria Select](#) on page 46.


Consultation Manager Enhancements

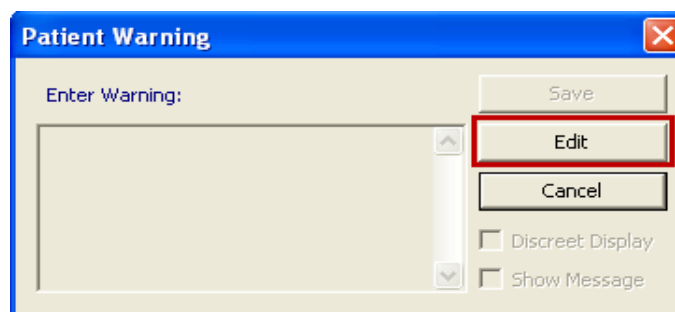
Patient Warning

This is a tool to add a patient warning which is displayed when the patient record is selected, for example, *patient is abusive*. The patient warning can be initially hidden using the Discreet Display function, which gives you the option of viewing the message.

A new function has been added to Security to enable you to determine who can add/edit patient warnings. See [Allow Staff to Add Patient Warnings](#) on page 7.

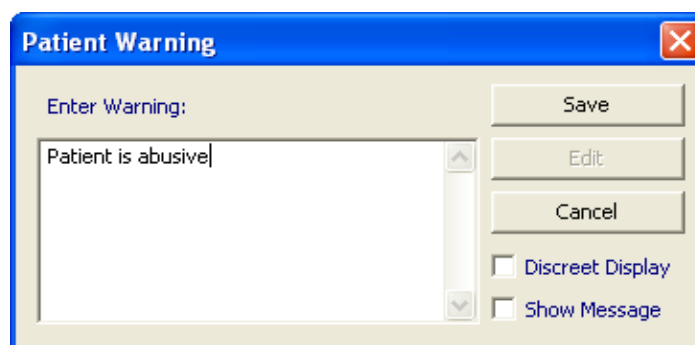
Adding a Patient Warning

1. Go to **Vision – Consultation Manager**. Select a patient.
2. Click the Patient Warning  icon on the toolbar. This will open the Patient Warning window.



Patient Warning

3. Click **Edit**. Type the patient warning in the Enter Patient Warning box, eg Patient is abusive.



NOTE: This is a free text field, with a limit of 255 characters.

4. To display the message click **Show Message**.
5. If the message is sensitive, the content can be initially hidden. Click the **Discreet Display** box to activate this function.
6. Click **Save** to close.



Edit a Patient Warning

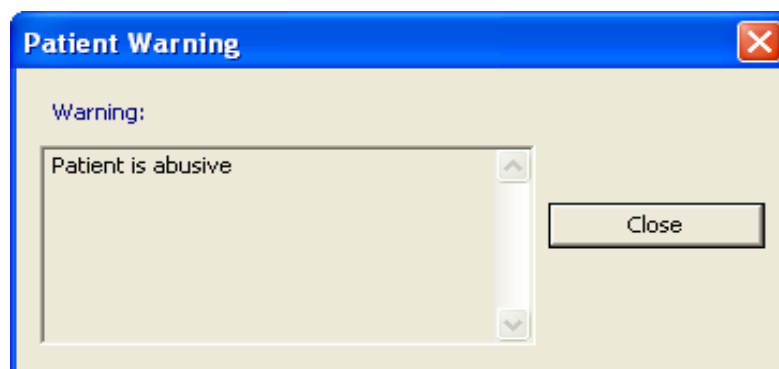
A previously added Patient Warning message can be edited.

1. Go to **Vision – Consultation Manager**.
2. Select the patient, click on the Patient Warning icon.
3. The Patient Warning window will open click **Edit**. You can now change the message, for example:
 - **Edit the text in the Enter Warning window.**
 - **To stop the warning being displayed, click the Show Message box to remove the tick.**
 - **Change the Discreet Display settings.**
 - **Delete the text to remove the warning.**
4. Click **Save**, to finish.

Viewing a Patient Warning

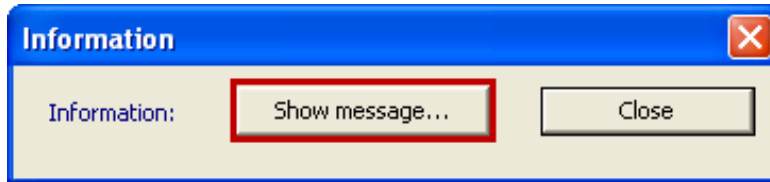
In Consultation Manager

If a patient has an active Patient Warning message, each time the patient record is opened in Consultation Manager, the Patient Warning will be displayed. You will also see the Patient Warning icon on the toolbar.  Indicates no message is recorded,  indicates a patient message is recorded.



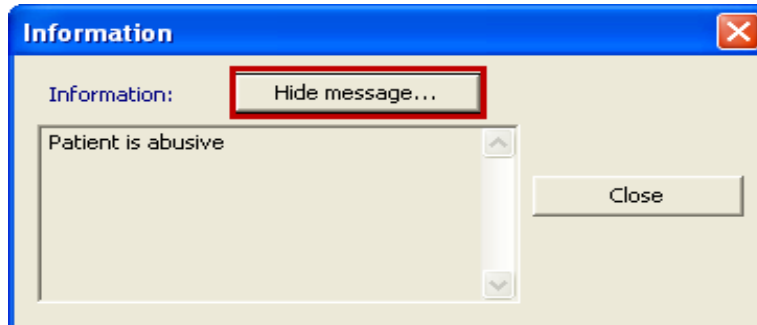
Patient Warning

If the message has been set to show discreetly, click **Show Message** to view the message, or **Close**.



TIP: If the patient sees the alert on the screen and is worried or concerned, you could explain this as a normal system alert.

A revealed discreet message can be hidden, click **Hide message**. Click **Close** to close the patient warning.

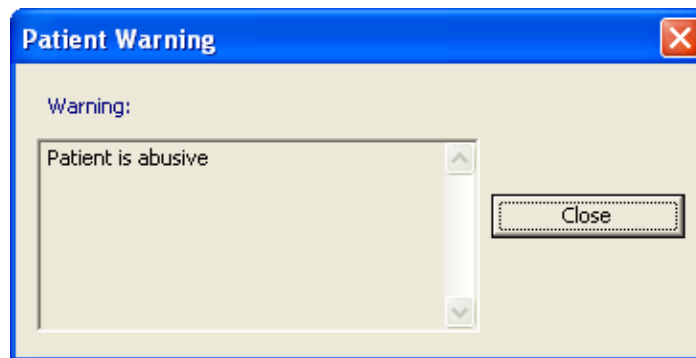


Discreet Message

The alert will remain closed unless the patient record is re-opened, or you click on the Patient Warning icon.

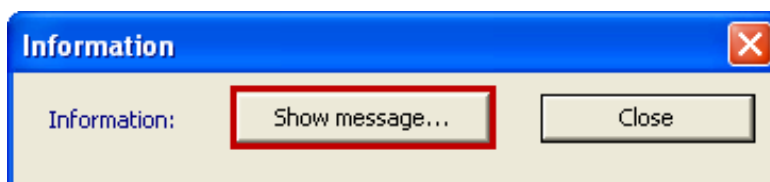
In Appointments

When selecting a patient in Vision - Appointments, if the patient has a Patient Warning, the warning will display prior to the Appointment Booking screen being displayed. To close the warning click **Close**.

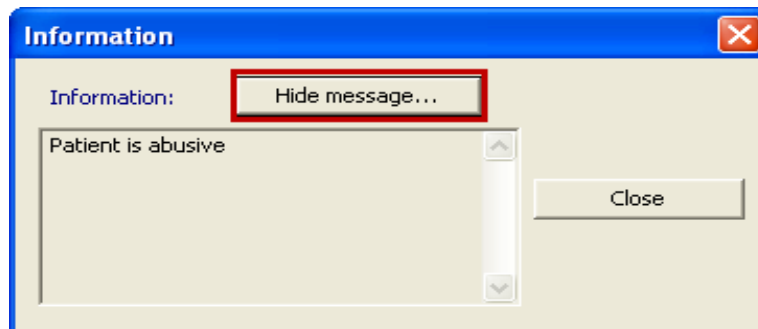


Patient Warning

If the message has been set to show discreetly, click **Show Message** to view the message, or **Close**.



A revealed discreet message can be hidden, click **Hide message**. Click **Close** to close the patient warning. The Appointment Booking form will now be displayed.

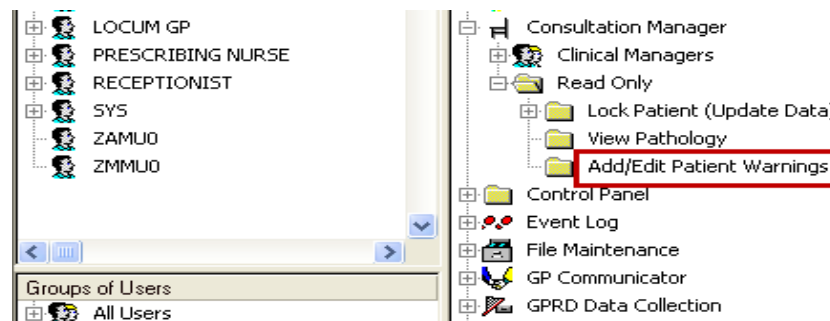


Discreet Message

To change or delete the patient warning, go to Consultation Manager. See [Edit a Patient Warning](#) on page 5

Allow Staff to Add Patient Warnings

A new function has been added to security to enable you to restrict which members of staff can add or edit patient warning messages. Patient Warnings access settings can be configured by a System Administrator from the front screen of Vision, from **Management Tools – Control Panel – Security – Vision Functions – Consultation Manager**.



Vision Functions – Patient Warnings

Any group that is placed immediately beneath the Consultation Manager heading has access to everything within that module. For example, if the Consultation Manager heading has the group **Clinical Managers** immediately beneath, then all members of that group have full access to Consultation Manager including the Patient Warnings.

NOTE: To restrict access, remove the group from the top of the tree and add users/groups to specific functions.

To remove the All Users group, highlight the group and right click, select **Remove Group from Function**.

To add users or groups to a specific function, for example, to enable users to add or edit Patient Warnings; right click **Add/Edit Patient Warnings**. Select **Add User to Function** or **Add Group to Function**. Select the user or group from the dialog box click **OK**.

NOTE: You can multi-select from the user or group list by holding down the CTRL key on the keyboard, then selecting all that apply.

Alternatively, you can drag and drop users and groups into the required function.

Patient Record Locked

Previously, when opening a patient record that had already been opened by another user you were presented with the following warning message: *The patient records will be shown in Display Only mode. The patient is already selected by another User.*



Old Display Only Warning Message

This has now been updated to include the following details:

- **Name of the user** with the open patient record
- **Name of the workstation**
- The **date** and **time** the patient records were locked.



New Display Only Warning Message

It is now easier to see who has the open record. You can now decide if the record needs to be closed.

Problem Enhancements

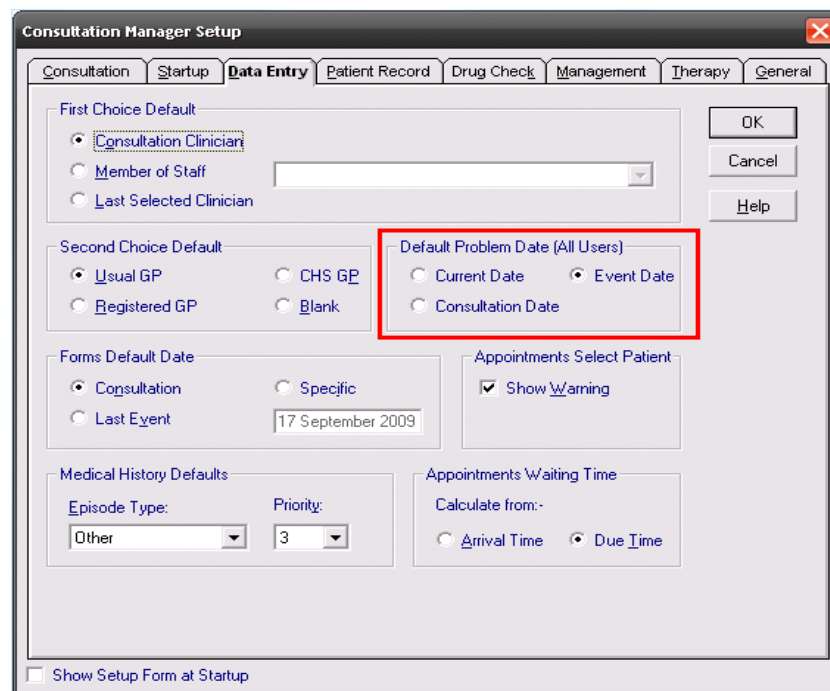
What's New

- New global default for Problem dates.
- Problem - Add now has new date options.
- The Short Name is no longer a mandatory field. A 10 character alpha-numerical short name can be generated automatically by the system.
- New button to Add a problem.
- Show Active Problems is now selected by a button.
- New filter button within the Problem tab for Repeat Issues.

NOTE: The enhancements apply to Problems in Consultation Manager only, they are not available in the Problem Populate module.

Setting the Default Problem Date

You can now set the default date for problems, so that when a problem is added the practices' desired date will be entered automatically. This global selection is set up through **Consultation Manager – Options – Setup – Data Entry – Default Problem Date (All Users)**.



The screenshot shows the 'Consultation Manager Setup' dialog box with the 'Data Entry' tab selected. The 'Default Problem Date (All Users)' section is highlighted with a red box. It contains three radio button options: 'Current Date', 'Event Date' (which is selected), and 'Consultation Date'. Other sections visible include 'First Choice Default', 'Second Choice Default', 'Forms Default Date', 'Medical History Defaults', and 'Appointments Waiting Time'.

Consultation Manager Setup screen showing new Default Problem Date field

There are three options:

- **Current Date** is the date you are creating the Problem.

- **Event Date** is the date of the journal entry.
- **Consultation Date** is the date of the consultation when the diagnosis was entered.

Select the default choice for the Practice and click **OK** to save and close.

Setting the Individual Problem Date

When adding a problem linked to an existing clinical entry, for example by dragging and dropping an item on to the **Problems Tab - New Problem** or by right clicking on an item and selecting **Problem – New Problem**, you will be offered three date options.

New Problem from an Ischaemic heart disease history entry

The date initially selected on opening will be the default date as set on the Consultation Manager Setup form. See

[Setting the Default Problem Date](#) on page 9 for further details.

The date can also be amended on an individual basis by selecting one of the following choices when adding a problem:

- **Consultation Date** - The consultation date when the diagnosis was entered.
- **Event Date** - The date attributed to the item.
- **Today's Date** - The date you are creating the Problem.

When adding a problem not linked to an existing clinical entry the date will default to today.

The date can still be edited, if required, by right clicking on the Problem Header, selecting **Edit** and amending the date.

Short Name

A user defined short name is no longer required within a Problem. If you **OK** a **Problem – Add** without adding a short name, Vision will generate a random short name consisting of 10 alphanumeric characters. The Short Name will be displayed in upper case, eg P000000001. The short name can still be edited by right clicking on the Problem Header, selecting **Edit** and changing it.

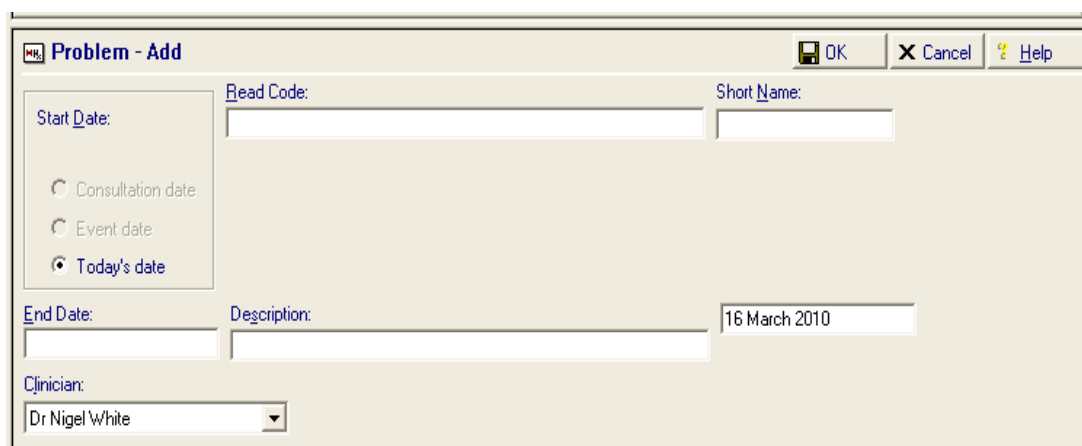
Add a New Problem

There is a new button on the Problems tab to add a **New Problem**.



Add a New Problem

Click the **New Problem** button to access the Problem – Add data entry form.



Problem - Add

Problems can also be added by either dragging and dropping an item on to the **Problems Tab - New Problem** or by right clicking on an item and selecting **Problem – New Problem**.

Changing Between Active and All Problems

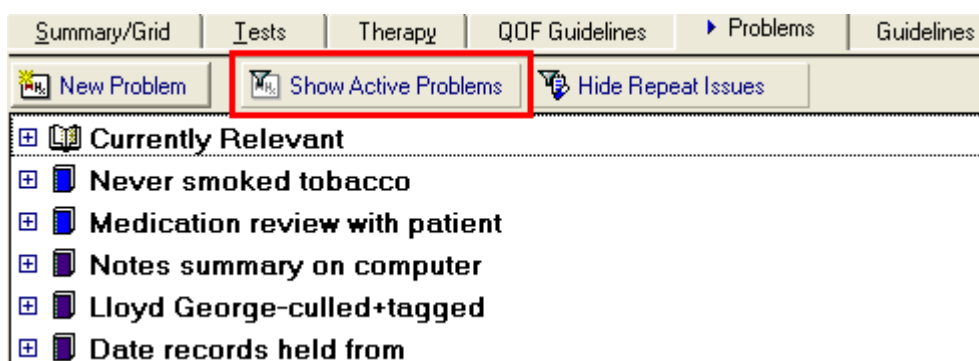
By default, the Problems tab will initially display active problems only.



Initial Problems tab showing Active Problems only

To view all problems, both active and inactive, click the **Show All Problems** button, all problems will then be listed. The button will change to **Show Active Problems**.

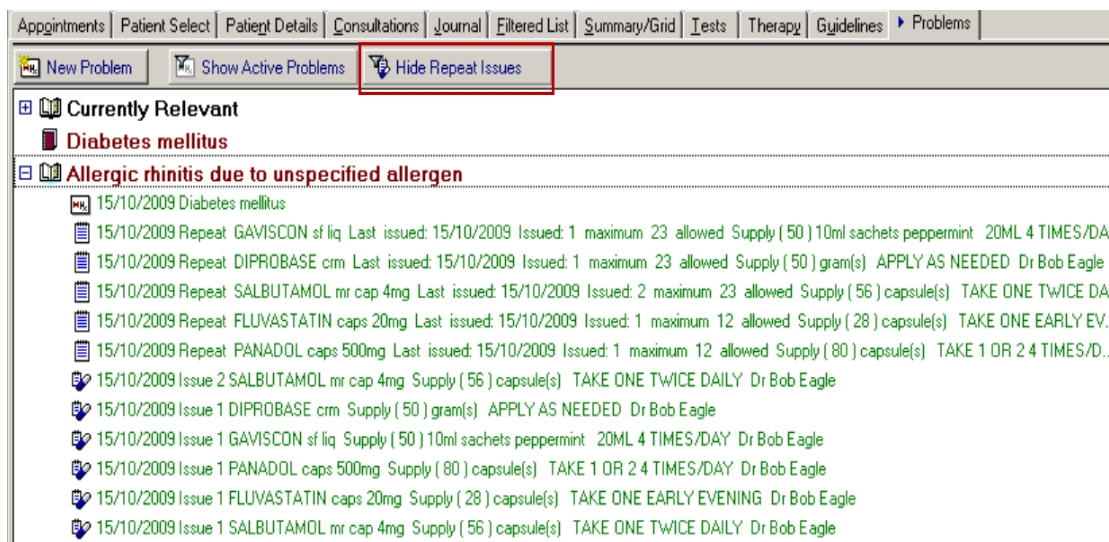
To return to active problems only click on the **Show Active Problems** button and only active problems for the patient will be listed. The button will change to **Show All Problems**.



Show all problems screen.

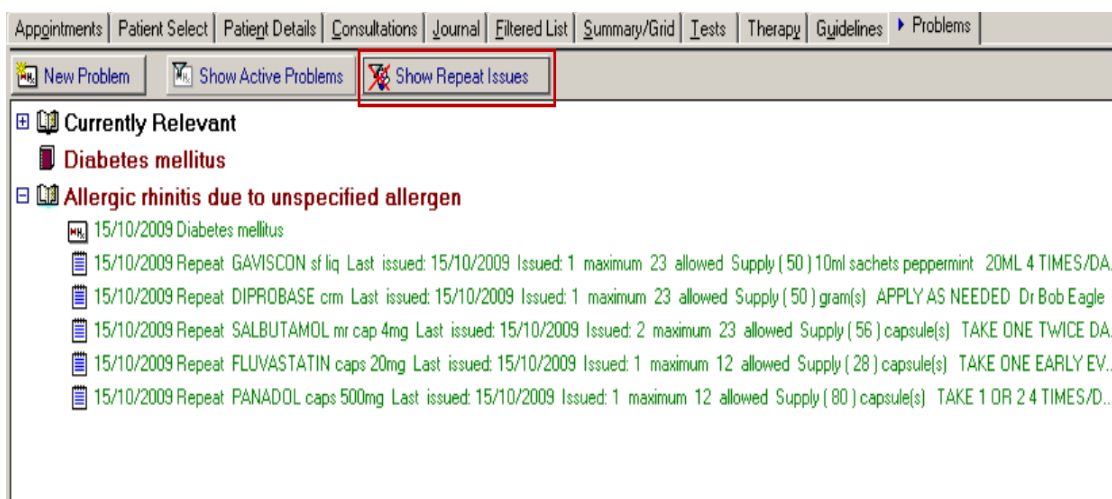
Filtering Repeat Issues from a Problem

In the case of patients that have ongoing conditions, problems can be difficult to look through when they are populated by all the repeat issues. There is now a **Hide Repeat Issues** button to exclude repeat issues where desired.



A problem tab showing the Repeat Issue Filter off

To exclude the repeat issues, click on the **Hide Repeat Issues** button. This setting will then be stored so next time the patient is viewed the repeat issues will not be displayed. The filter, now labelled **Show Repeat Issues**, can be used at any time to enable the repeat issues to be viewed.



A problem tab showing the Repeat Issue Filter on

Optimisation for Loading Patients

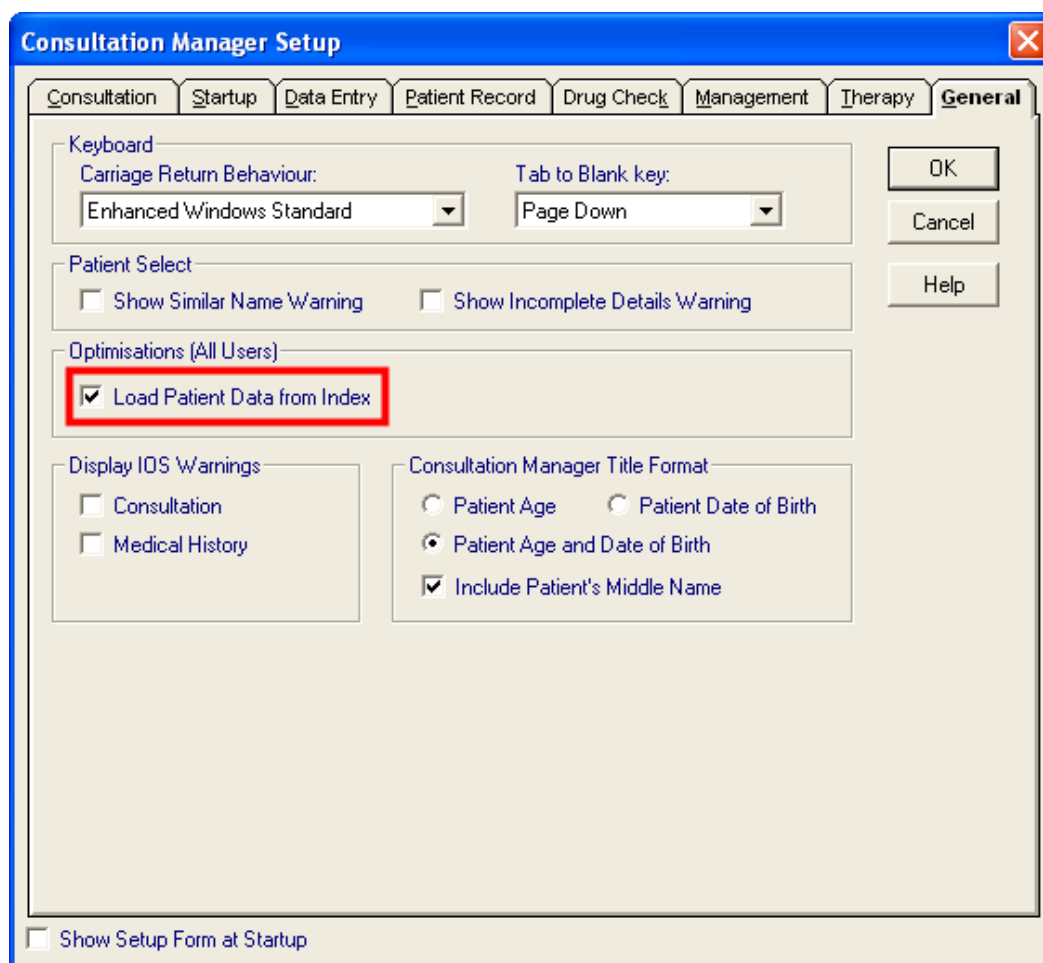
A new option has been added to **Consultation Manager set up – General – Optimisation**, which replaces the Maximise performance and Maximise resources options.

There is now one option called **Load Patient Data from Index** and if selected, speeds up how patient records are loaded for all Vision users in your practice. This is because optimisation loads the therapy, clinical and test data areas of a patient's record from the index file, all other data will be loaded in the usual way from the main database files.

Note VES Practices ONLY: This Optimisation will be enabled automatically during the DLM310 install.

To enable the function (LAN Practices ONLY):

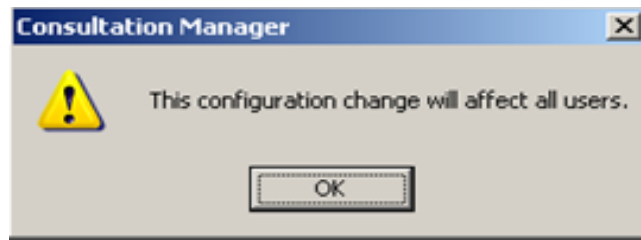
1. In Consultation Manager, go to **Consultation Manager – Options – Setup – General – Optimisations (All Users)**.
2. Tick **Load Patient Data from Index**.



The screenshot shows the 'Consultation Manager Setup' dialog box with the 'General' tab selected. The 'Optimisations (All Users)' section is highlighted with a red box, and the 'Load Patient Data from Index' checkbox is checked. Other options include 'Carriage Return Behaviour' (Enhanced Windows Standard), 'Tab to Blank key' (Page Down), 'Show Similar Name Warning', 'Show Incomplete Details Warning', 'Display IOS Warnings' (Consultation, Medical History), 'Consultation Manager Title Format' (Patient Age and Date of Birth, Include Patient's Middle Name), and 'Show Setup Form at Startup'.

Consultation Manager – Setup

3. A warning message then displays stating: *This configuration change will affect all users.*



This configuration change will affect all users

4. Click **OK** to confirm.
5. Then **OK** on the set up form to save.

Test Result Qualifiers

To address the issue of some result indicators sent by laboratories not being available in vision the following picklist has been created:

Code	Description
PTH001	Above high reference limit
PTH002	Below low reference limit
PTH003	Outside reference range
PTH004	Potentially abnormal
PTH005	Normal
PTH006	Low
PTH007	High
PTH008	Significantly Low
PTH009	Significantly High
PTH010	Abnormal
PTH011	Very Abnormal
PTH012	Not Applicable

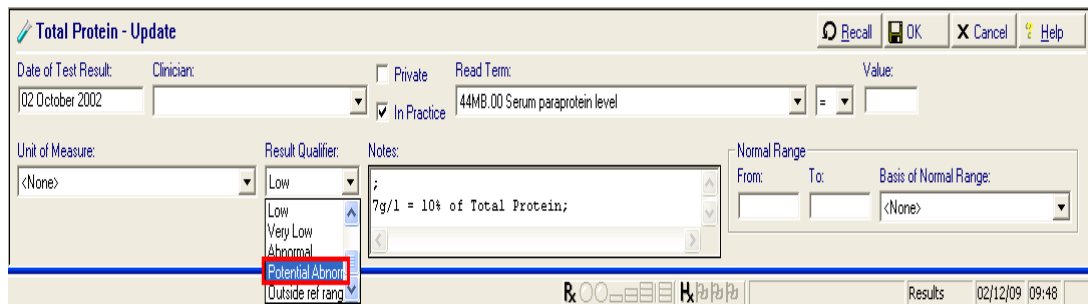
On filing an electronic pathology message, the test result qualifiers will be mapped directly to one of the new codes. This ensures that the Vision record accurately reflects the message received from the laboratory.

This will apply to new results that have been imported after installation of the new software, and will not convert pre-existing messages.

This picklist is not available to use when manually adding test results in Consultation Manager.

Once the test result is filed, the result qualifier can be edited in Consultation Manager. The code from the new picklist will be shown with the usual result qualifiers for that test. Once the qualifier is edited, the new picklist entry will be removed from the selectable list.

Result Qualifier – Not Edited



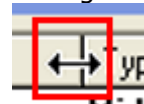
Result Qualifier - Edited

Column Resizing

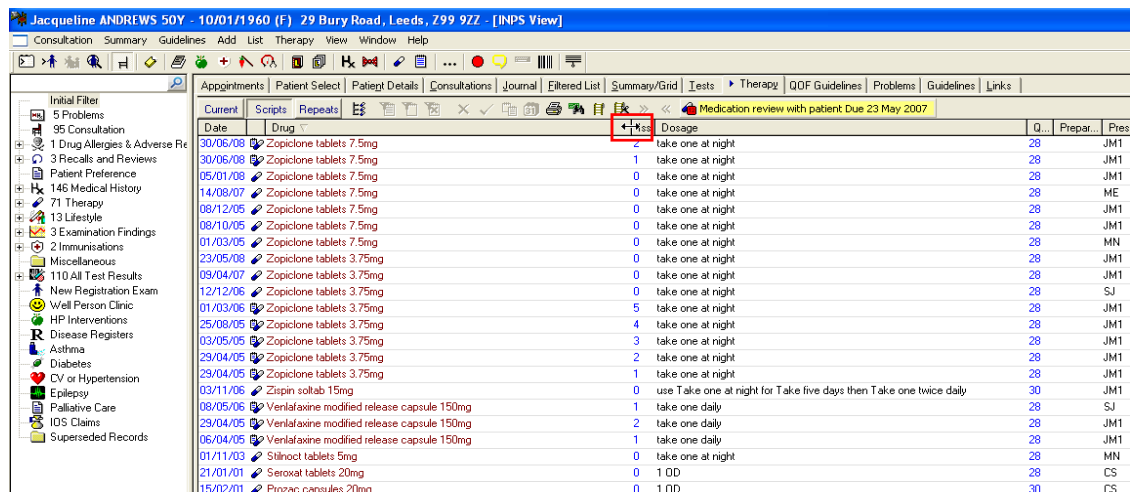
It is now possible to resize a column in Consultation Manager by double clicking on the column separator. This will resize the column to the largest data in that column or to the column header, (whichever is the larger). Empty columns cannot be resized. The columns return to original size on exit.

To Resize a Column

1. In Consultation Manager select a view with columns eg Therapy.



2. Point to the column separator, when the arrows appear double click on the separator, the column will resize to the largest data or column header.
3. The column returns to original size on exit.



Consultation Manager

Registration Enhancements

Merge Patient Record

Merge Patient Record is a Registration tool, which enables you to merge duplicate records. The facility allows you to move clinical data from a duplicate record (which is usually inactive) to an existing active record. Please note the following:

- You need the relevant Security rights to merge patient records. See [Allow Staff to Merge Patients](#) on page 27.
- Once the merge process is complete, you must check the active patient record for duplicate data. See [Checking the Recently Merged Active Record for Duplicate or Erroneous Information](#) on page 22.
- Once the merge process is complete, you must also make sure the unwanted duplicate record has a registration status of Transferred Out. See [Registration status for merged records](#) on page 25.
- All merges are audited in the Event Log module. See “Event Log” on page 27.

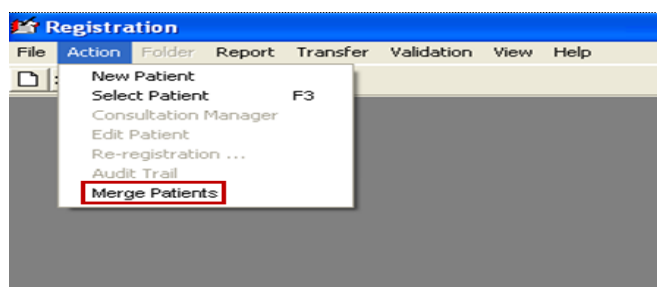
WARNING: ALL attachment data including letters, pathology results, ECG, photographs retain the patient’s original demographic data. Therefore, this process **SHOULD NOT** be used for patients undergoing Adoption or Witness Protection.

Merge Patient Records

To merge patient records:

NOTE: Once the merge patient process is complete, it **CANNOT** be reversed. Please take extreme caution when selecting patients to merge.

1. In the Registration Module, go to **Action – Merge Patients**.



Action - Merge Patients

- The **Merge Patient** screen is displayed.

The screenshot shows the 'Merge Patient' window with two sections for finding patient records. The top section is titled 'Patient Record to Proceed With - Active Records Only' and contains fields for Name, NHS No, Sex, Date of Birth, and Address, along with a 'Find' button. The bottom section is titled 'Patient Record That Will No Longer Be Used' and contains the same fields and a 'Find' button. On the right side of the window, there are 'Merge' and 'Cancel' buttons.

Merge Patient Screen

- In the **Patient Record to Proceed with – Active Records Only** section, click Find and select the active patient's record you wish to merge data into. Once the selection is made, the patient demographics are displayed on the Merge patient screen.
- Next, in the **Patient Record That Will No Longer Be Used** section, click Find and select the patient's record you wish to transfer data from. This is usually an inactive record eg Transferred Out/Expired Temporary Resident. Once the selection is made, the patient demographics are displayed on the Merge patient screen.
- When you have selected both patient records, check again to ensure you have the correct patients for your merge.
- Click **Merge** to continue.

The screenshot shows the 'Merge Patient' window with patient details populated. The top section, 'Patient Record to Proceed With - Active Records Only', shows: Name: Mrs Lilian Gallery, NHS No: 580 277 8016, Sex: Female, Date of Birth: 08/02/1926, Address: Flat 23 Pilbrow Court, Canberra Close, Leeds, Z99 9ZZ. The bottom section, 'Patient Record That Will No Longer Be Used', shows: Name: Ms Lilian Gallery, NHS No: (blank), Sex: Female, Date of Birth: 08/02/1926, Address: 25 Galemoor Avenue, Leeds, Z99 9ZZ. The 'Merge' button on the right is highlighted with a red box.

Merge Patients

If the patient's sex and/or date of birth do not match you will be prompted:
"Warning! The patients' dates or birth and sexes do not match. Are you sure that these are the correct patients?"

The screenshot shows a 'Patient Merge - Warning' dialog box with a yellow warning icon. The text inside reads: 'Warning! The patients' dates of birth do not match. Are you sure that these are the correct patients?'. There are 'Merge' and 'No' buttons at the bottom, with the 'Merge' button highlighted by a red box.

Check the patient's details and if correct click Merge to continue.

If there is an outstanding Registration Links transaction, an existing FP69 transaction or outstanding medical record flag you will be prompted:

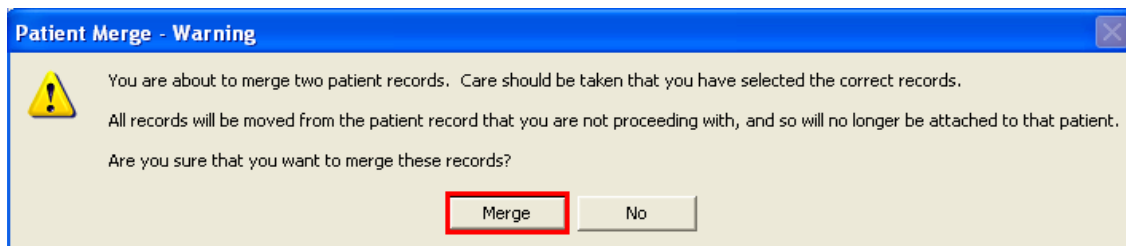
"The patient merge could not be performed for XX (patient name) because XX (Outstanding transaction details)."

Click **OK** to close. Once the outstanding transactions have been completed you can continue with the merge.

7. You will be prompted:

"You are about to merge two patient records. Care should be taken that you have selected the correct records. All records will be moved from the patient record that you are not proceeding with, and so will no longer be attached to that patient. Are you sure that you want to merge these records?"

Click **Merge** to continue.

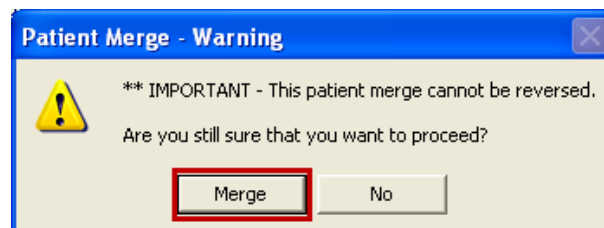


Patient Merge - Warning

8. You are prompted:

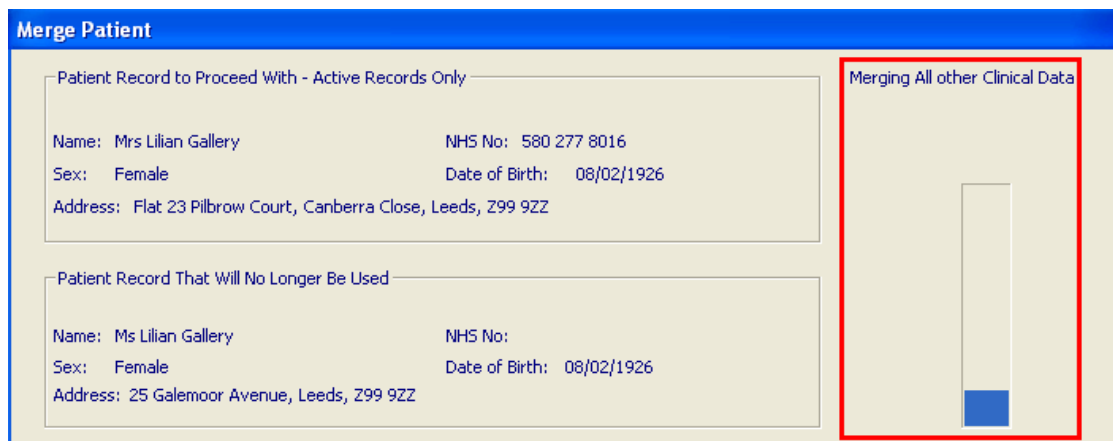
***IMPORTANT - This patient merge cannot be reversed. Are you still sure that you want to proceed?*

Click **Merge** to continue.



Patient Merge - Warning

9. The records will now be merged; a progress bar will be displayed on the right of the Merge Patient screen.



Merge Patient Progress

During this process, if one of the records to be merged is in use, you will be prompted:

"The merge could not proceed because the patient XX (patients name are shown here) is locked by XX (details of user, workstation and time are shown here)".

Click **Ok** to close, you are returned to the Merge Patient screen. When the records are closed, the merge can proceed.



10. Once the Patient Merge is complete, you are prompted:

"The patient merge has completed successfully.

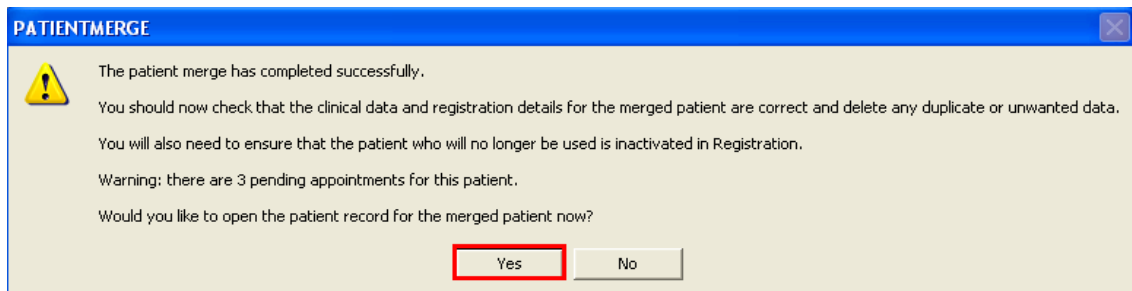
You should now check that the clinical data and registration details for the merged patient are correct and delete any duplicate or unwanted data.

You will also need to ensure that the patient who will no longer be used is inactivated in Registration.

Would you like to open the patient record for the merged patient now?"

Click **Yes** to open the active record in Consultation Manager.

NOTE: If the patient who will no longer be used has appointments, pending the following warning will be displayed: *"Warning: there are X (number of appointments displayed) pending appointments for this patient."* These appointments will need to be cancelled and remade with the merged record details.



Patient Merge Confirmation

11. Check the patient's record to ensure all the data has transferred successfully. See [Checking the Recently Merged Active Record for Duplicate or Erroneous Information](#) on page 22. When completed close the patient record.

12. Next, check the Registration status of the duplicate record. You must ensure this record has the registration status of transferred out, to prevent data being added to it. See [Registration status for merged records](#) on page 25

Checking the Recently Merged Active Record for Duplicate or Erroneous Information

Following a successful merge, it is essential that the active patient record is checked for duplicate or erroneous information. This **MUST** be done before the record is transmitted to any other agency (ie GP2GP/Summary Care Record/Emergency Care Summary).

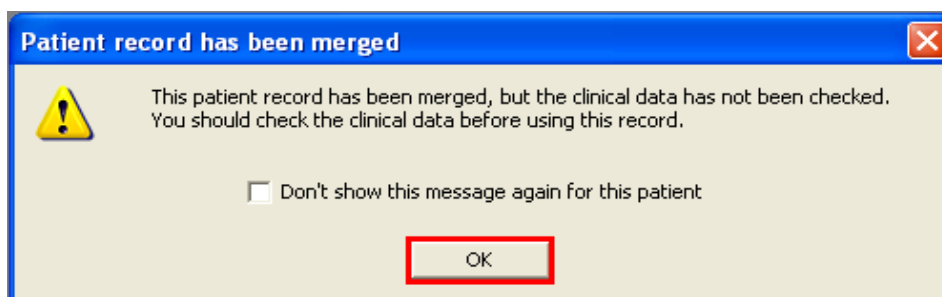
1. After the merge has completed and you have opted to view the merged patient record, you are prompted:

"This patient record has been merged, but the clinical data has not been checked. You should check the clinical data before using this record."

2. Click **OK** to open the patient record and complete a review of the data.

There may be duplicated or erroneous entries; it is important to check Therapy, Repeat Medication to ensure that repeat masters have not been added to the patient record that are no longer required for the patient. All data areas **MUST** be checked in particular, History, Problems and Allergies. Delete any data entries that have been duplicated.

This message is presented each time the patient is selected until the record has been checked.



3. When checking is completed, reselect the patient. The Patient record has been merged window will open. You will be prompted: *"Don't show this message again for this patient"*, tick the box and then click **OK** to finish. This confirms the record has been checked, and stops the Merged Record message appearing.

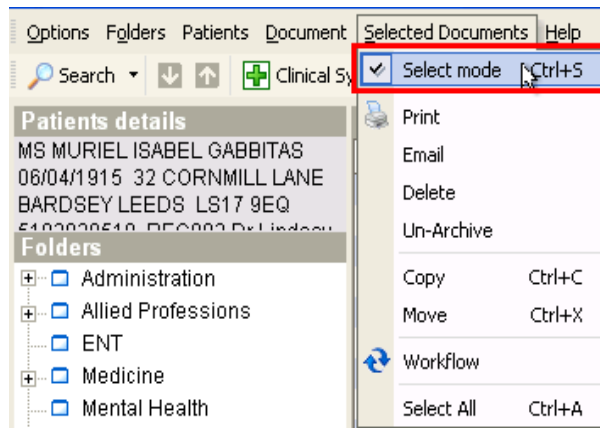
NOTE: No record is made in Consultation Manager, which states that the patient record has been merged. A Read code for this process has been requested and will be available at some point in the future. It is recommended that you keep a record of merged patients, which you can update with a Read code once available. See also Event Log – Patient Merge.

Documents Filed in Docman

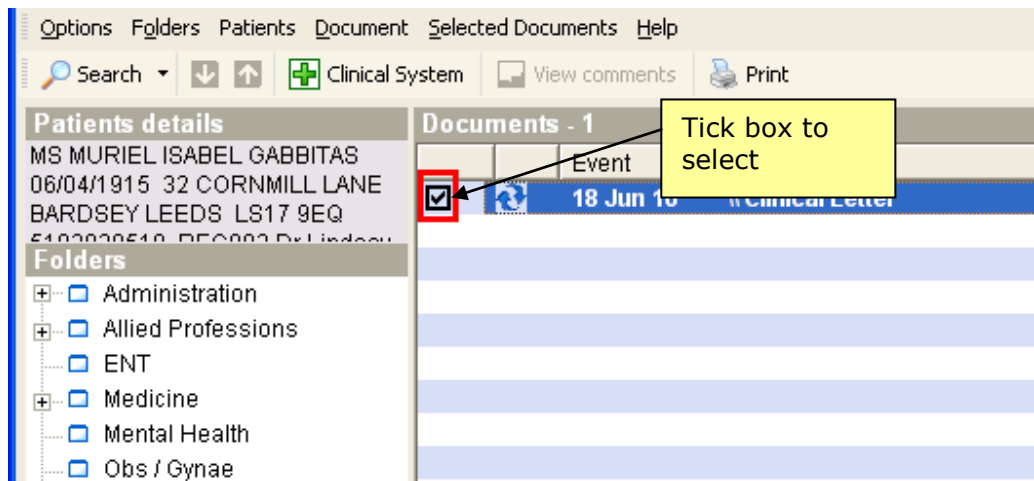
When merging patients, any letters filed in Consultation Manager using DocMan, will be moved to the active merged record. To view this record in Docman you will need to move the letter/s to the active merged patient record.

To move documents in Docman

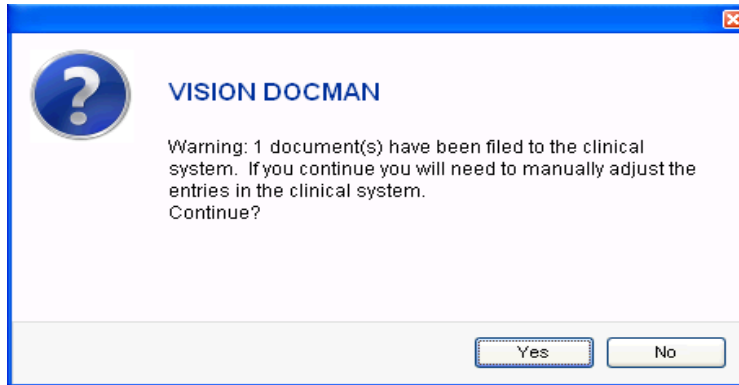
1. In **Docman – Patient**, select the inactive merged patient record.
2. Expand the **Selected Documents** menu, click **Select mode**.



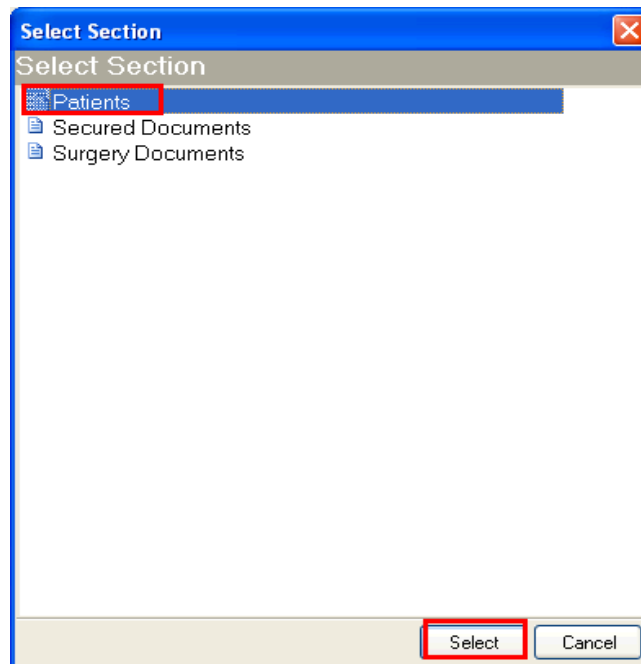
3. Tick all documents that need to be moved, to select all documents, from the Selected Documents menu click **Select All**.



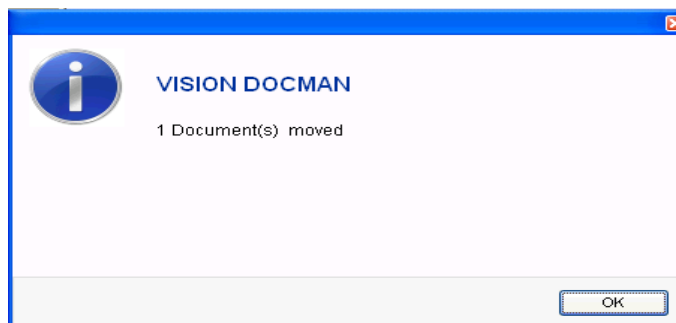
4. Click **Selected Documents – Move**, you are prompted: "*Warning: X (number of documents) document(s) have been filed to the clinical system. If you continue you will need to manually adjust the entries in the clinical system. Continue? Yes/No*". Select **Yes** to continue.



5. The Select Section menu will be displayed, highlight **Patients** and click **Select**.



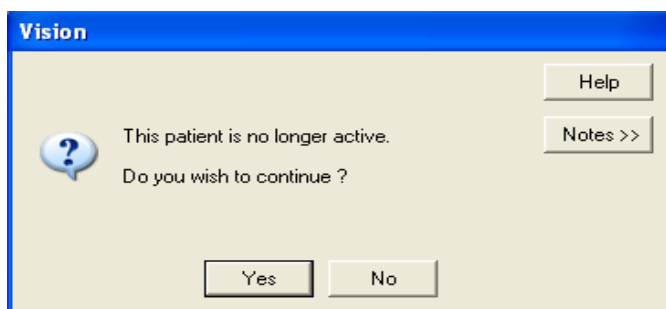
6. The Patient Search window will be displayed, enter the **patients name** and click **search**, select the **Active Merged Patients record** from the list, click **Select**.
7. The documents are moved, the confirmation message confirms the number of documents moved. Click **OK** to close



Registration status for merged records

Once the patient merge is complete and you have checked the details of active record, you need ensure the merged record is now inactive.

1. Go to the Registration module and select the unwanted record.
2. If the record is inactive the following prompt displays: *The patient is no longer active. Do you wish to continue?*

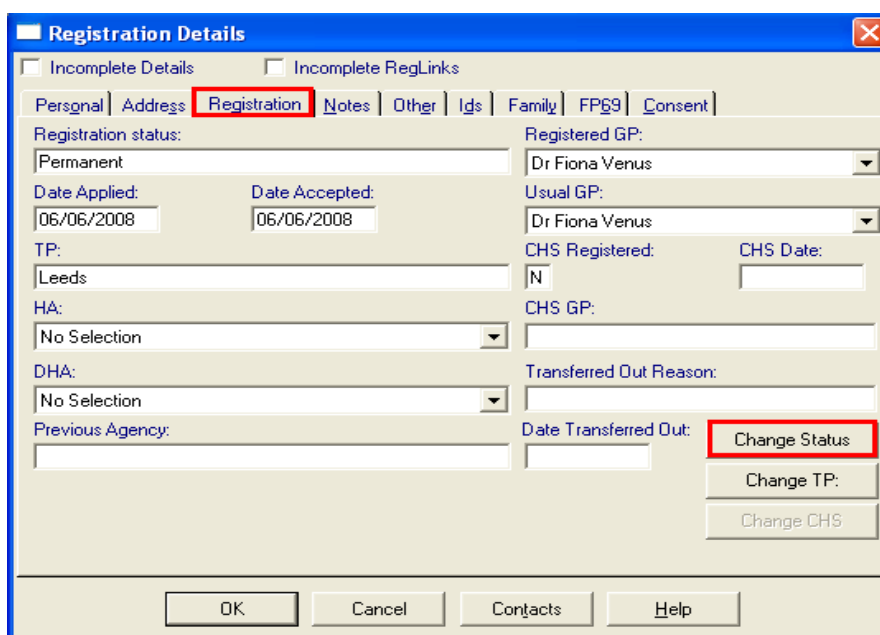


Registration Inactive

3. If this prompt is not displayed, it means that the unwanted record is still active and you must change the registration status to transferred out. This procedure differs depending on whether your Practice is Registration Linked or not. See [Transferring Out Procedure - Non Linked Practices](#) on page 25 and [Transferring Out Procedure - Registration Linked Practices](#) on page 26

Transferring Out Procedure - Non Linked Practices

1. Go to **Vision – Registration** and select the patient.
2. Click the **Registration** tab.



Registration Tab – Change Status

3. Click the **Change Status** button.

4. Select **Transferred Out** from the Reg. Status drop down list. Add the date of deduction and select a **Reason** from the drop down list.

5. Click **OK** to finish.

Transferring Out Procedure - Registration Linked Practices

If the patient's registration status is active, you should check with your TP before deducting. Deduction transactions are normally sent from the TP for the practice to process. When approved a security deduction transaction is required.

1. In **Registration- Security**, select **Deduct Patient**.
2. Enter the patient details to find the patient, click **OK**.
3. Enter the **Date of Deduction** and select the **Reason for Deduction**.

Registration – Security Deduct

4. Click **OK** to finish.

Changing Patients Surname

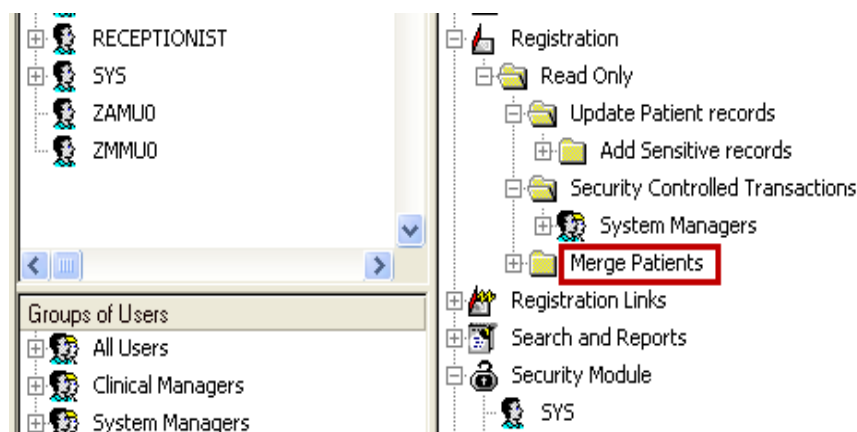
To prevent the duplicate record being listed and selected, it is advisable to amend the surname to prevent the record appearing in Patient Select searches.

There are two methods for this:

- Type **ZZ** before the surname eg ZZSmith
- Change the surname to **Duplicate**, add the previous surname in the required field.

Allow Staff to Merge Patients

A new function has been added to security to enable you to restrict which members of staff can access the Merge Patient function. Merge Patient rights can be configured by a System Administrator from the front screen on Vision from **Management Tools – Control Panel – Security – Vision Functions - Registration**.



Vision Functions – Merge Patients

Any group that is placed immediately beneath the Registration heading has access to everything within that module.

WARNING: If the group **All Users** is placed immediately beneath the Registration heading, no restrictions apply. All users have full access to registration, including Merge Patients.

To remove the All Users group, highlight the group and right click, select **Remove Group from Function**.

To add users or groups to a specific function, for example **Merge Patients**; right click on the heading and select **Add User to Function** or **Add Group to Function**. Select the user or group from the dialog box click **OK**.

NOTE: You can multi-select from the user or group list by holding down the CTRL key on the keyboard, then selecting all that apply.

Alternatively, you can drag and drop users and groups into the required function.

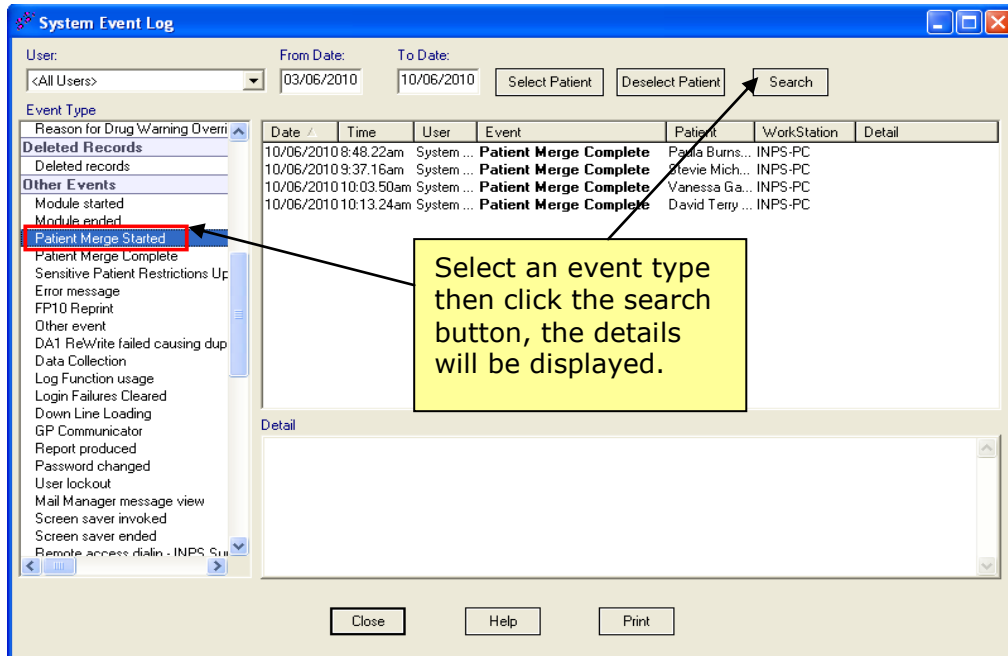
Event Log – Patient Merge

The Event Log now records audit trail details of all Merges undertaken. To check the Event Log go to **Vision – Management Tools – Events**. Two new categories have been added in the Other Events category:

- **Patient Merge Started** – Patients selected for Patient Merge, where the merged process has been interrupted and not completed, ie the records are not merged. See [Merge Patient Records](#) on page 18
- **Patient Merge Complete** – This is a list of all completed Patient Merges. Use this list to ensure all merged clinical records have been

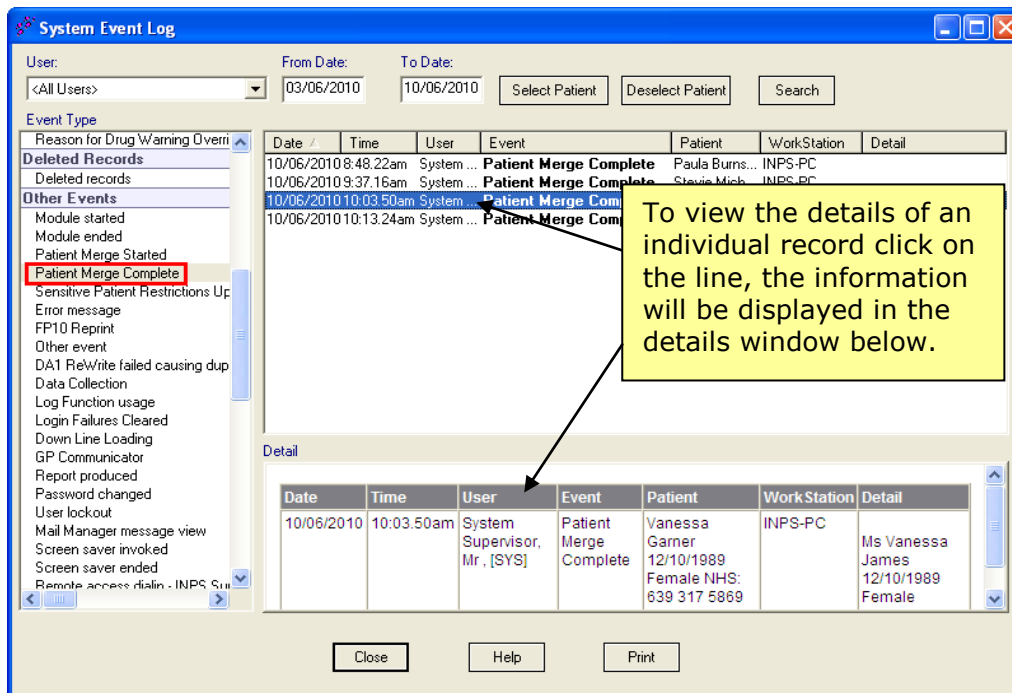
checked. See [Checking the Recently Merged Active Record for Duplicate or Erroneous Information](#) on page 22

To view the event log click on the event type ie Patient Merge Started and click the **Search** button, this will list any appropriate entries.



Patient Merge - Started

To view the details click on the data line in the main window the information will be shown in the detail window.



Patient Merge - Completed

“Sensitive” Patient Records

There is a new facility available which permits you to restrict access to a patient’s clinical record in Consultation Manager for example, when a member of staff is also a patient. All staff can continue to make appointments, access registration details etc for the Sensitive Patient, but they are restricted from opening the Consultation Manager records.

You restrict staff access to a specific patient’s record by creating a Sensitive Record

via the **Restrictions**  button in **Registration – Other**.

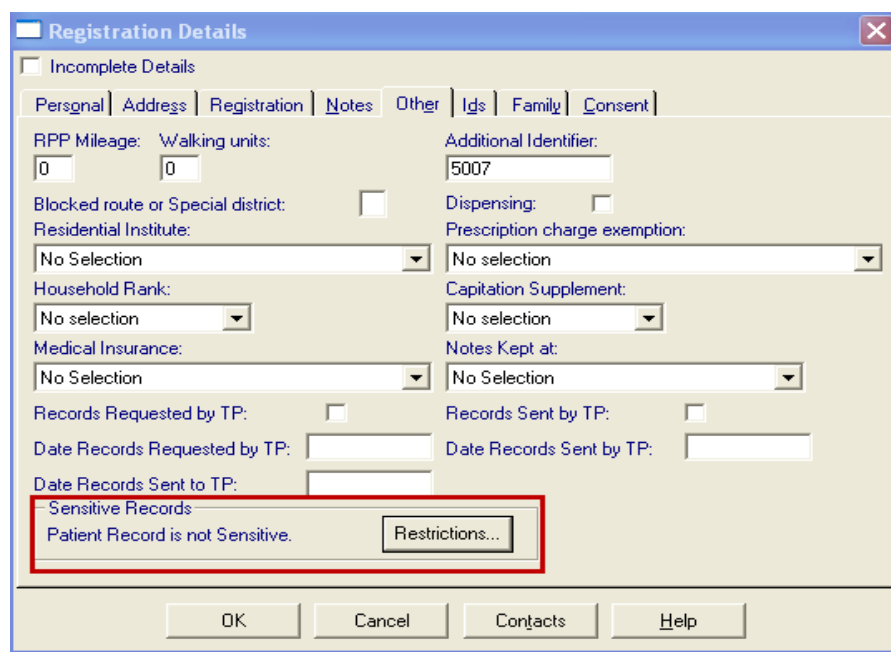
NOTE: All staff can view the restriction details of specific patients (ie, view which staff can open the patient record).

To limit who can create a sensitive patient record, you need to restrict access to the function in Security. See [Allow Staff to Add Sensitive Records](#) on page 33.

Create a Sensitive Record

NOTE: To create/edit Restrictions, access must be given in Security. All users can view the Restriction details.

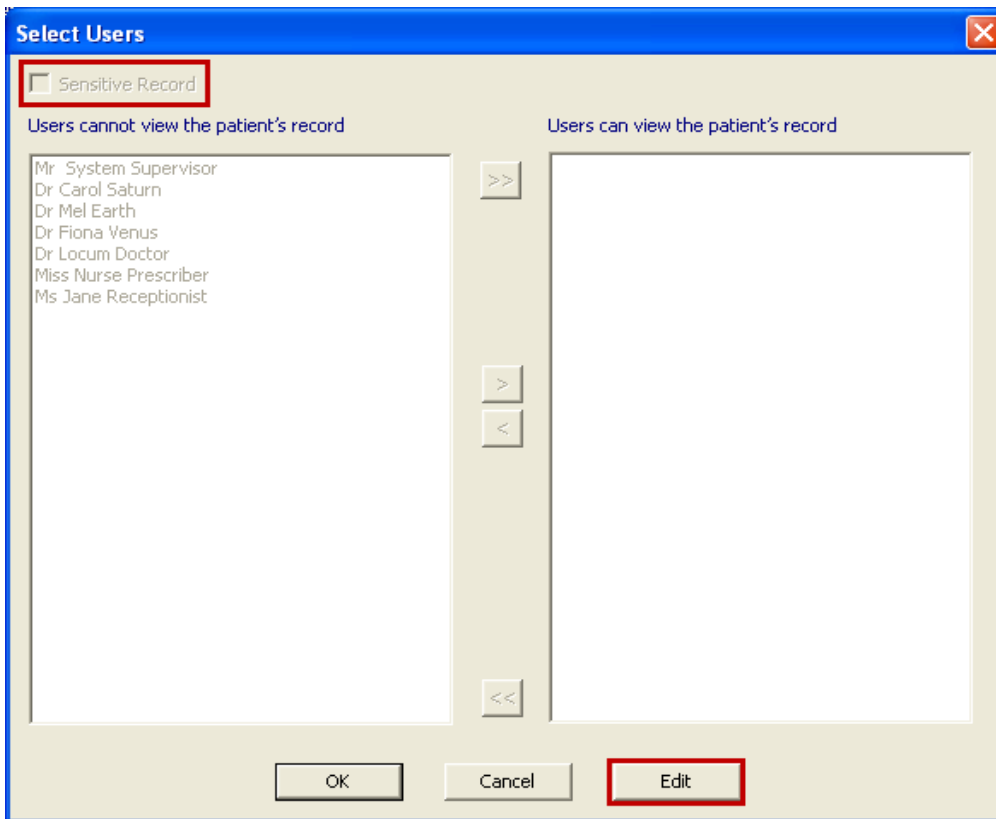
1. Go to **Vision – Registration**. Select the relevant patient’s record.
2. Select **Other**, click **Restrictions** at the bottom of the screen.



The screenshot shows the 'Registration Details' dialog box with the 'Other' tab selected. The 'Sensitive Records' section is highlighted with a red box, showing 'Patient Record is not Sensitive.' and a 'Restrictions...' button. Other fields include RPP Mileage, Walking units, Additional Identifier, Blocked route or Special district, Residential Institute, Household Rank, Medical Insurance, Records Requested by TP, Date Records Requested by TP, Date Records Sent to TP, Dispensing, Prescription charge exemption, Capitation Supplement, Notes Kept at, and Records Sent by TP, Date Records Sent by TP.

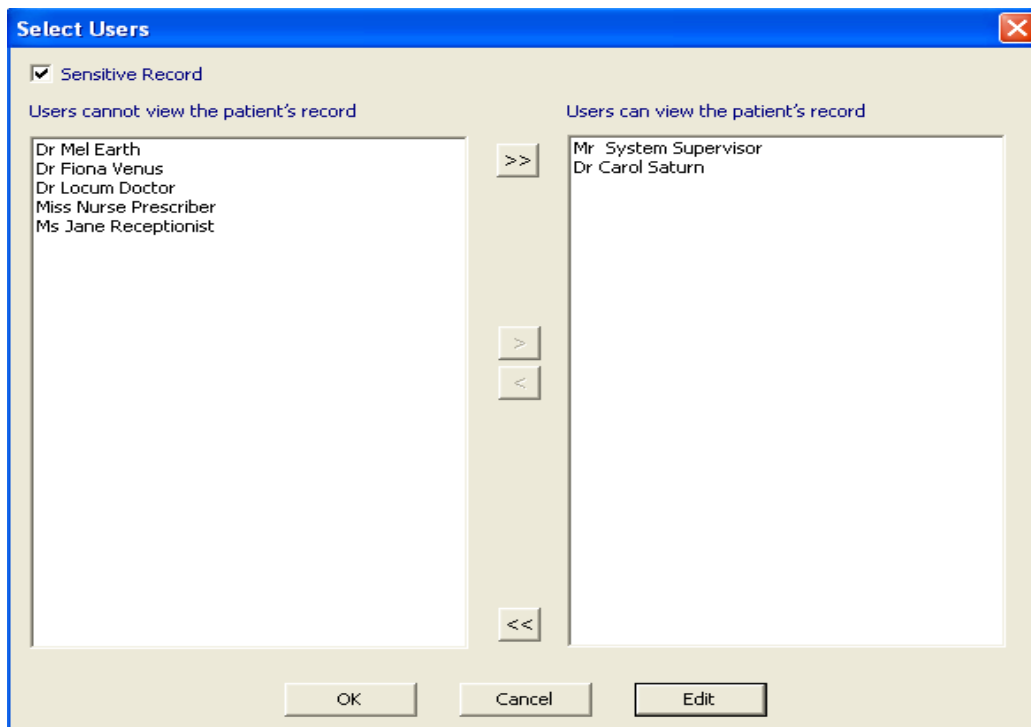
Registration - Other

3. Click **Edit** then tick the Sensitive Record box.



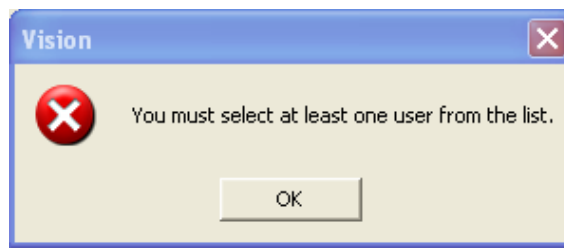
Restrictions

4. Select which users can access the sensitive records. Use the arrow buttons to move users from the **Users cannot view the patient's record** column to the **Users can view the patient's record** column. Use the double arrow buttons to move all users, or the single arrow buttons to move individual users.



Restrictions – Select Users

5. You must select at least one user from the list. If you click OK without doing so, you will be prompted; *"You must select at least one user from the list"*. Click **OK** to return to the Select Users window, use the arrow buttons to select users.



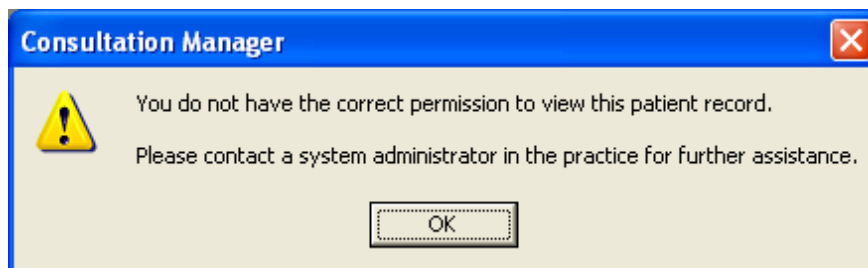
6. Click **OK** to finish and close.

Viewing a Sensitive Record

If you have permission to view a sensitive patient record, you can do so with no restrictions.

However, if you do not have permission to access a sensitive patient record, each time you attempt to open the Consultation Manager records for the Sensitive Patient you will receive the following warning message:

*You do not have the correct permission to view this patient record. Please contact a system administrator in the practice for further assistance. Click **OK** to close.*



Sensitive Record Warning

Editing the Sensitive Restrictions

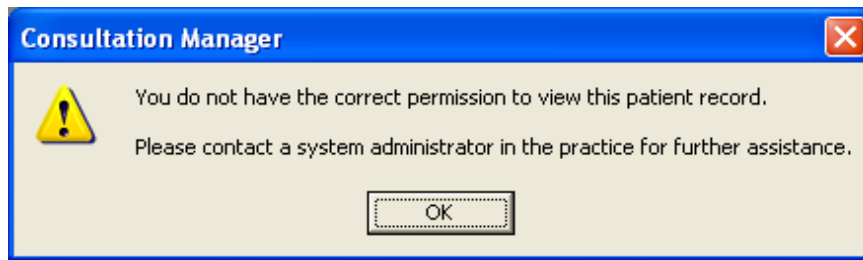
To edit Sensitive Patient restrictions, you must have permission to do so. This is determined in **Control Panel – Security**. See [Allow Staff to Add Sensitive Records](#) on page 33

1. Open the patients **Registration** record.
2. Select **Other** tab and click on the **Restrictions** button. This will open the Sensitive Patient Restrictions window.
3. Click **Edit** and make the required change, click **OK** to finish and close.

TIP: To remove the Restriction, click to remove the Sensitive Record tick at the top of the Restrictions window, then click OK.

When you do not have permission to edit a sensitive patient record, you will be prompted: *You do not have the correct permission to mark this patient as being*

sensitive. Please contact a system administrator in the practice for further assistance. Click **Ok** to close the message.

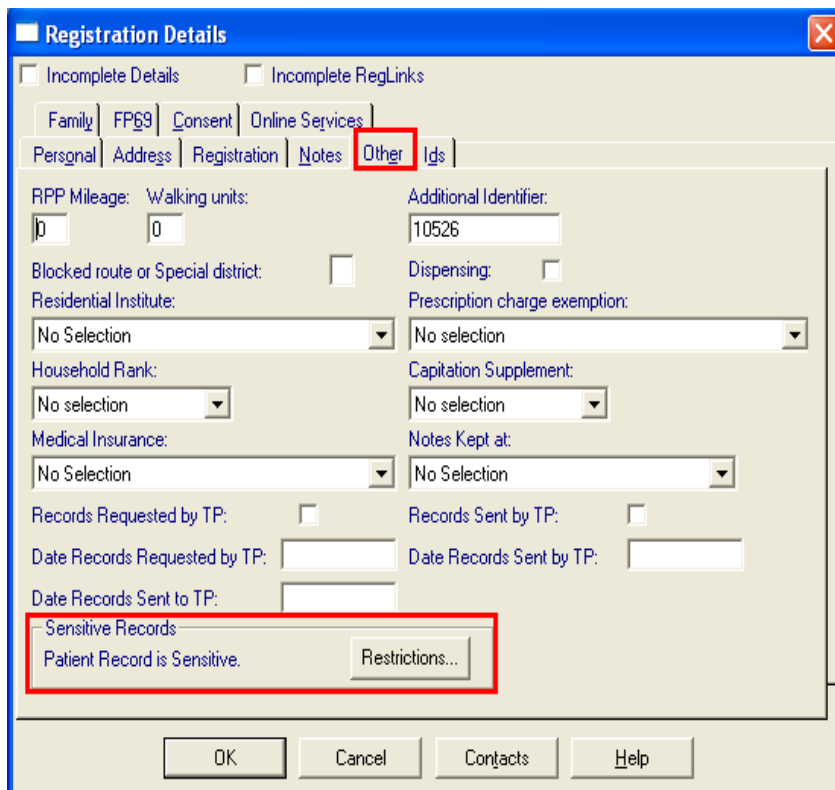


Sensitive Record Warning

Checking Which Staff have Access

To check which staff can access the Sensitive Record:

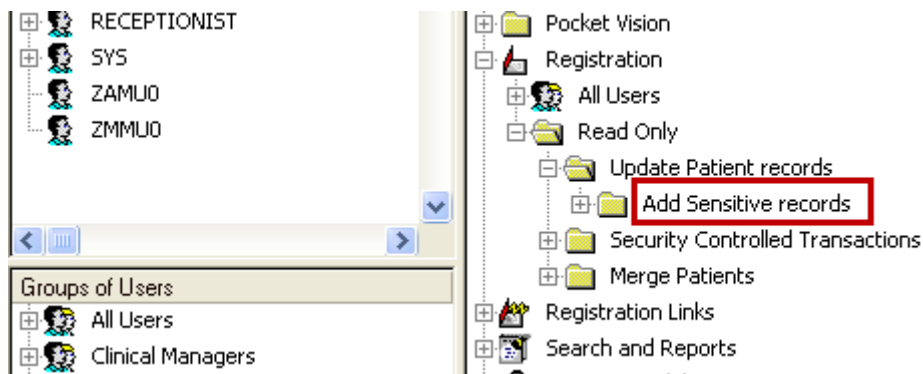
1. Open the patients **Registration** record.
2. Select **Other** tab and click on the **Restrictions** button. This will open the Sensitive Patient Restrictions window.



3. Check the **Users can view the patient's record** column to see who has access. Any tasks required for the patient can be passed to the member/s of staff that has access to the record.
4. Click **OK** to close and finish.

Allow Staff to Add Sensitive Records

A new function has been added to Security to enable you to restrict which members of staff can add or edit sensitive records. Sensitive record access settings can be configured by a System Administrator from the front screen of Vision from **Management Tools – Control Panel – Security – Vision Functions – Registration.**



Vision Functions – Sensitive Records

Any group that is placed immediately beneath the Registration heading has access to everything within that module. For example, if Registration has the group **All Users** immediately beneath, then all users have full access to registration.

To remove the All Users group, highlight the group and right click, select **Remove Group from Function.**

To allow staff access to Registration only, without permission to Add Sensitive records, Security Controlled Transactions or Merge Patients add staff to Update Patient records.

To add users or groups to a function, for example Add Sensitive records; right click on the heading and select **Add User to Function** or **Add Group to Function**. Select the user or group from the dialog box click **OK**.

NOTE: You can multi-select from the user or group list by holding down the CTRL key on the keyboard, then selecting all that apply.

Alternatively, you can drag and drop users and groups into the required function.

Clinical Audit Enhancements

GP Analysis

The GP Analysis tab has been created for Clinical Audit to enable you to analyse clinical audit results using the following criteria:

- Registered GP
- Usual GP
- Branch Surgery - "Notes Kept at" (Branch Surgery) (if Applicable)
- QOF Practices (if Applicable)
- Patient Sets (defined by each practice)

The new tab **GP Analysis** has been added, when an audit line is first selected for analysis, or the GP Analysis tab is first opened, the current highlighted grid cell is the bottom right cell, ie the most recent total. The GP Analysis tab can be used to analyse any existing clinical audit line as shown below:

The screenshot shows the 'GP Analysis - Clinical Audit - All Audits & nGMS Monitoring' window. The 'GP Analysis' tab is selected. The summary section displays the following data:

0	0.00%	CHD02 EXCEPTION8: Angina first diagnosed in the last 3 mths
0	0.00%	CHD 02 EXCEPTION9: Any of the above exceptions 3 - 8
14	20.90%	CHD02 NUMERATOR: Pts. with newly diagnosed angina referred for exercise testing and/or specialist asse
53	79.10%	CHD 02 NEGATIVE: Pts. with newly diagnosed angina NOT referred for exercise testing and /or specialist assessment
240	98.77%	CHD05 DENOMINATOR: Pts. with CHD who are eligible
0	0.00%	CHD05 EXCEPTION1: BP recording exception in the last 15 mths
0	0.00%	CHD05 EXCEPTION2: Registered in the last 3 mths
1	0.41%	CHD05 EXCEPTION3: Pts. unsuitable recorded in last 15 mths
2	0.82%	CHD05 EXCEPTION4: Informed dissent recorded in last 15 mths

The data grid below shows the number of patients for each GP from November 2008 to October 2009. The 'GP Analysis' tab is highlighted in the top navigation bar.

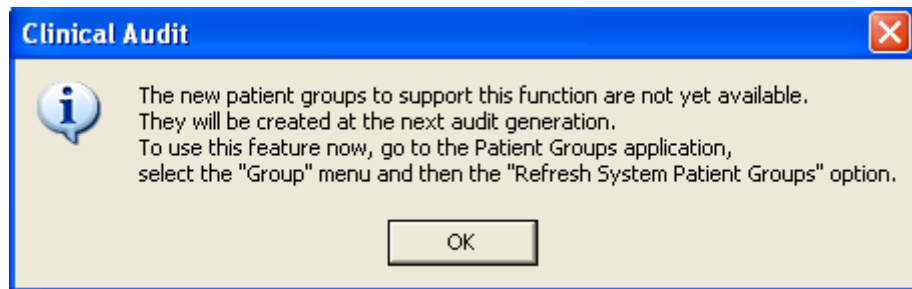
	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09	Jul 09	Aug 09	Sep 09	Oct 09
Earth, Mel	0	0	0	0	0	0	0	0	0	0	0	0
Jupiter, Sarah	66	66	66	66	65	65	66	66	65	65	67	68
Mars, Jane	61	61	61	61	61	61	61	62	62	62	63	64
Neptune, Michael	0	0	0	0	0	0	0	0	0	0	0	0
Venus, Fiona	108	108	108	108	107	107	107	106	106	106	107	108
Total	235	235	235	235	233	233	234	234	233	233	237	240

Clinical Audit – GP Analysis

This tab can be used to analyse any existing clinical audit line. Use the radio buttons to select the required criteria, eg Registered GP. The results will be displayed as a data grid and also a graph, which can be printed. By selecting an item in the data grid, you can view the relevant patients and save or print the group.

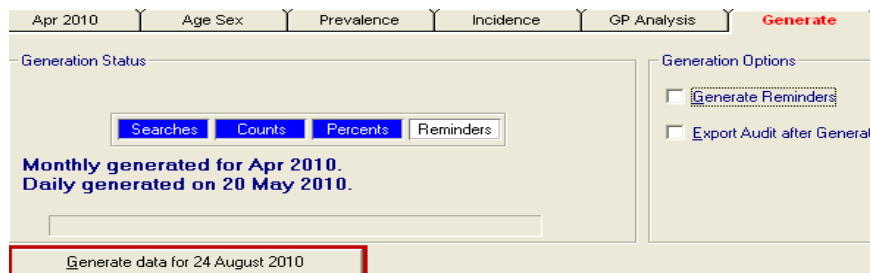
Following DLM310 installation; you are unable to view GP Analysis data until the audits have been generated or the Patient System Groups updated, you will be prompted:

"The new patient groups to support this function are not yet available. They will be created at the next audit generation. To use this feature now, go to the Patient Groups application, select the "Group" menu and then the "Refresh System Patient Groups" option." Click **OK** to close the message.

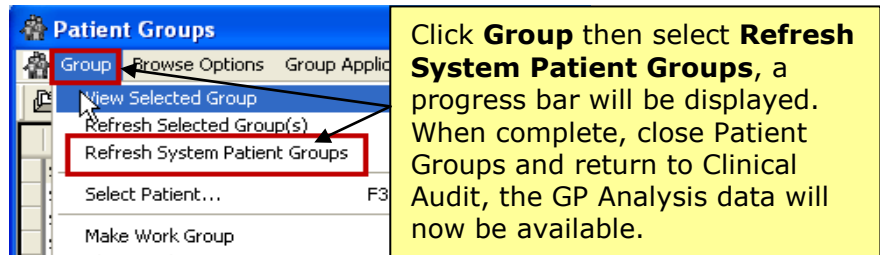


To view GP Analysis data either:

- Run "**Generate Data For (today's date)**" from the Generate Tab



- Or, "**Refresh System Patient Groups**" from Patient Groups.



Analysis Criteria

After selecting the audit line, use the radio buttons to select the required criteria, eg Registered GP. For Use Defaults and No. of Periods, see Date options below.

The options are:

The screenshot shows a software interface with a tabbed menu at the top containing 'Apr 2010', 'Age Sex', 'Prevalence', 'Incidence', 'GP Analysis', and a partially visible 'G'. The 'GP Analysis' tab is active. Below the tabs, there are two rows of controls. The first row includes a 'Start Date' section with a month dropdown set to 'May' and a year dropdown set to '2009', followed by a refresh icon and three radio buttons: 'Registered GP' (which is selected), 'Usual GP', and 'Patient Set...'. The second row includes a 'No. of Periods' dropdown set to '12' and a checked 'Use Defaults' checkbox. A red rectangular box highlights the radio button options.

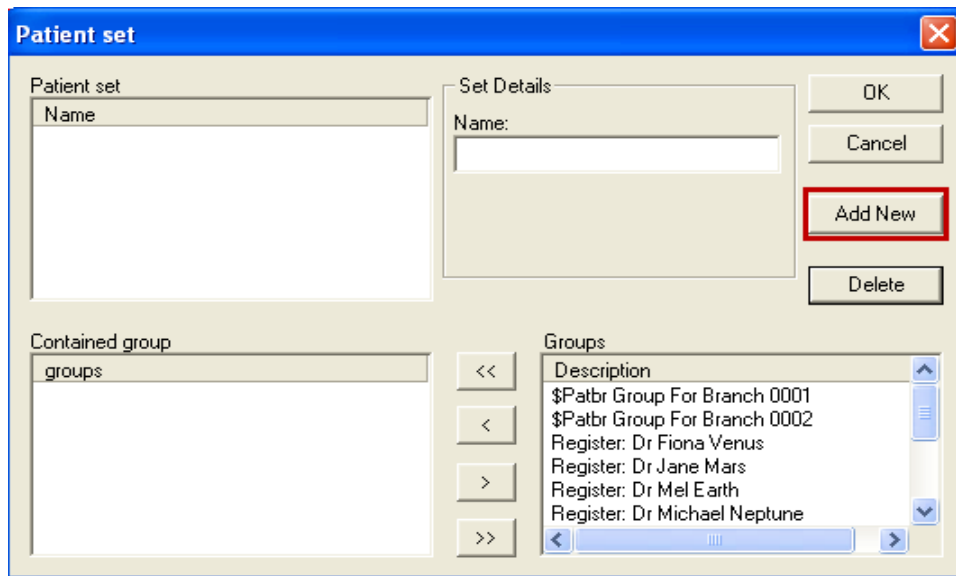
GP Analysis Selection Criteria – No Multiple sites or QOF Id's are setup

The screenshot shows a software interface with a tabbed menu at the top containing 'Oct 2009', 'Age Sex', 'Prevalence', 'Incidence', 'GP Analysis', and 'Genera'. The 'GP Analysis' tab is active. Below the tabs, there are two rows of controls. The first row includes a 'Start Date' section with a month dropdown set to 'November' and a year dropdown set to '2008', followed by a refresh icon and three radio buttons: 'Registered GP' (which is selected), 'Usual GP', and 'Patient Set...'. The second row includes a 'No. of Periods' dropdown set to '12' and a checked 'Use Defaults' checkbox. Additionally, there are two more radio buttons: 'QOF Practice' and 'Branch'. A red rectangular box highlights the radio button options.

GP Analysis Selection Criteria – Showing multiple sites and/or QOF Id's are setup

- **Registered GP**
- **Usual GP**
- **Branch Surgery** – This criteria will only be available to select when Multiple sites is activated in Practice Details – Control Panel. The “Notes Kept at” field must be used to record which site the patient attends.
- **QOF Practices** – This option will only be available if you have multiple National Practice Identifier sites set up on the QOF reporting tab.
- **Patient Set** – Are user maintained patient lists based on saved combinations of system patient groups. You can then view audit data for this group. For further details see [Patient Sets](#) on page 37.

Patient Sets



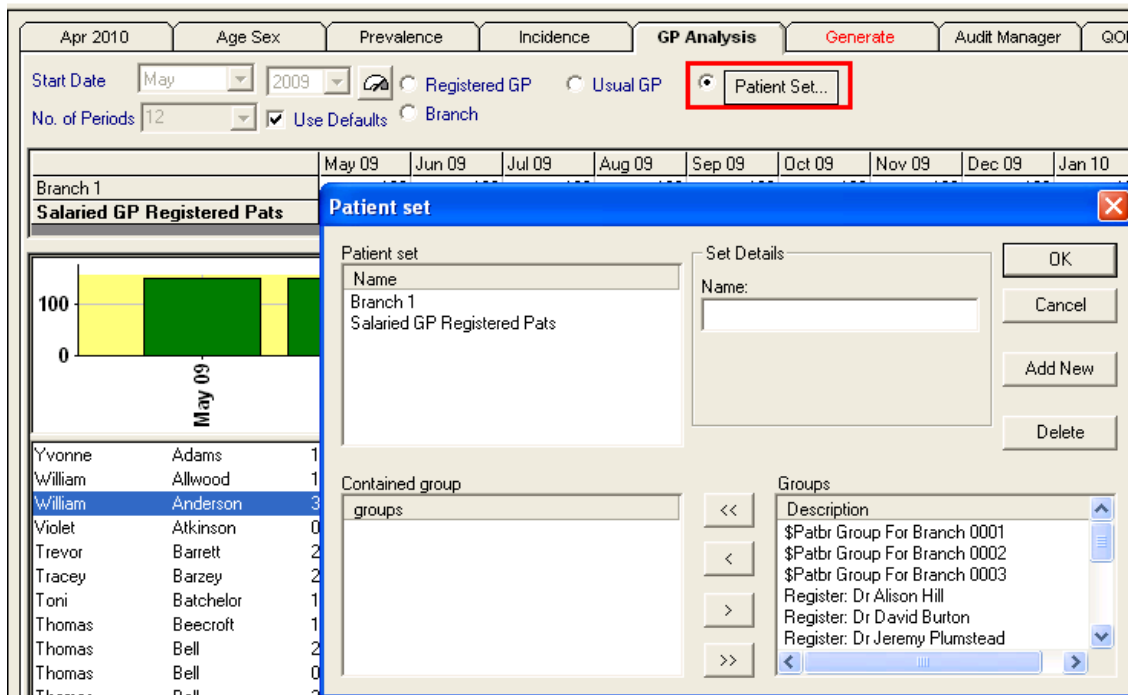
Patient Set - Add

- Patient sets are defined by one or more patient groups from the following categories in any combination: registered GP, usual GP and branches. For instance, you may create a patient set of Salaried GP Registered Patients. Then whichever audit line you are looking at is filtered in.
- Each of these groups can be included in more than one patient set definition.
- Each patient set must be given a description, which is displayed in the left column.
- There is no restriction on the number of sets and they can be edited and deleted at any time.
- The system patient groups are regenerated at every Clinical Audit generation, the patient sets are always up to date.
- For the analysis, the groups referenced in the Patient Set will be joined to produce a single patient group per set. These are then used to provide the patient counts for each set for the selected audit line.

For instance, to create a group of female GPs:

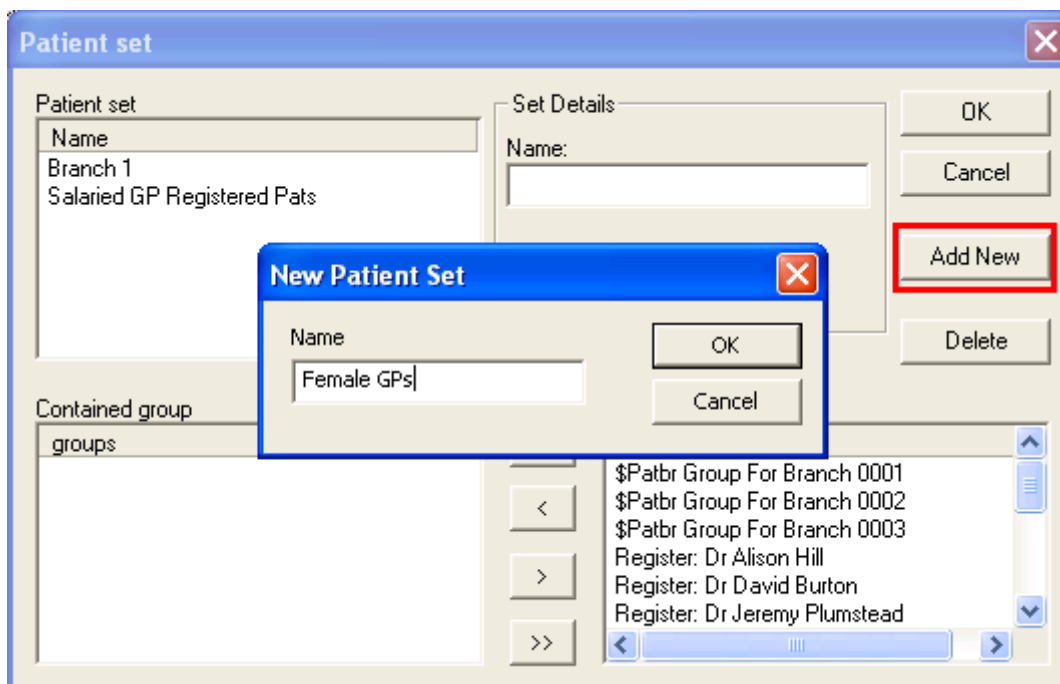
Click here for a video of this process: <http://www.screencast.com/t/OTQ2MDYzYT>

1. Firstly run GP Analysis for either Registered GP or Usual GP.
2. Click the **Patient Set** button to create a set, opening the **Patient set** window. The system patient groups are listed under Groups at the bottom right, eg, Register: Dr Fiona Venus, Register: Dr Jane Mars etc.





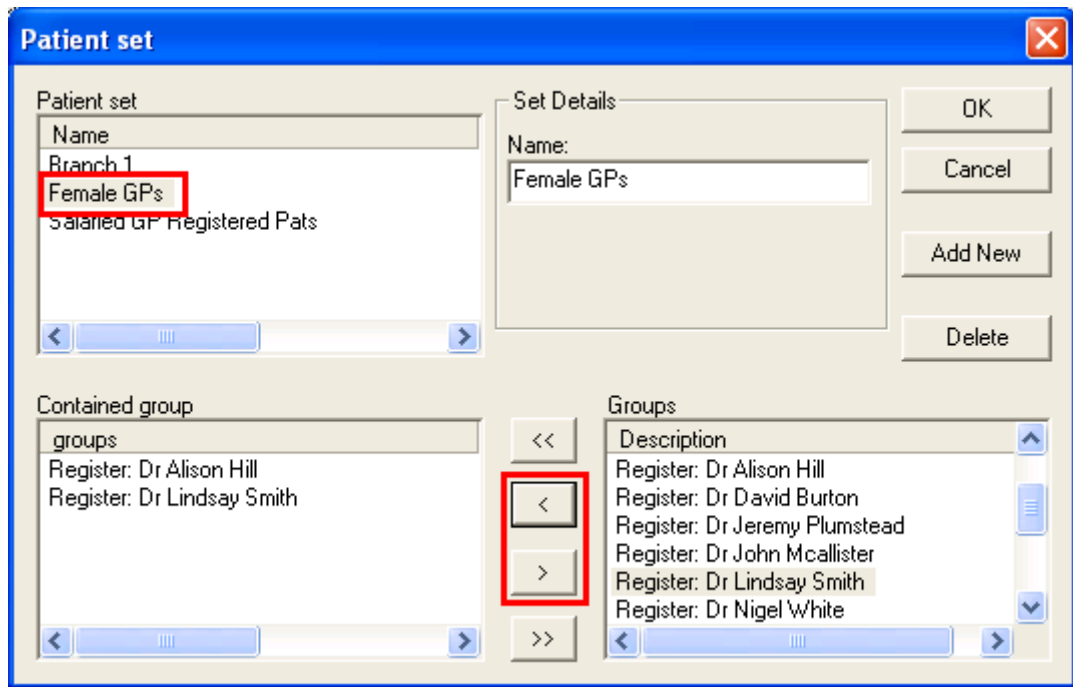
Patient Set Window

3. Click **Add New**. This lets you enter a name of the set, eg, Female GPs, then click **OK** to add the name to the **Patient Set** box at the top left of the Patient set window.

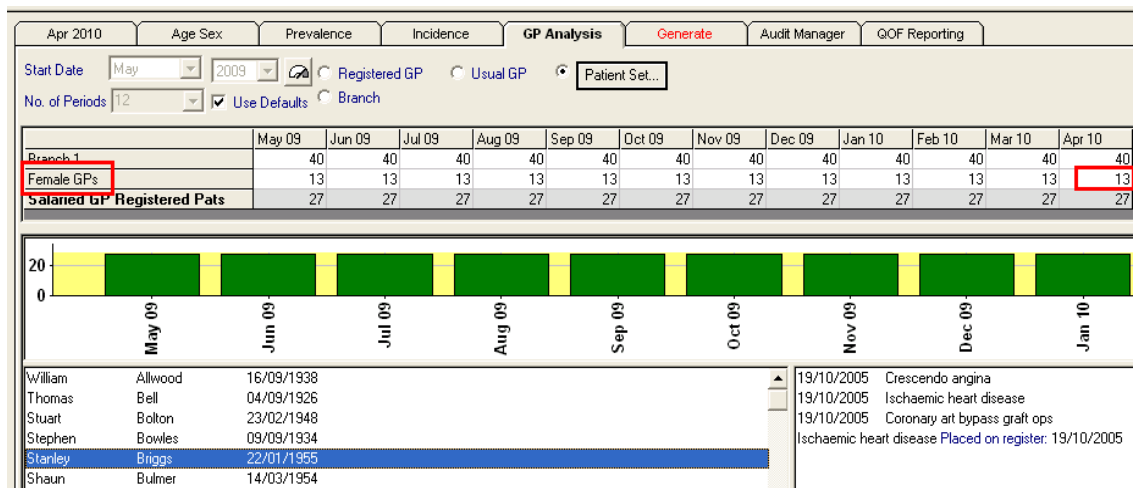


Patient Set – Create New Patient Set

4. Click the set name, eg Female GPs.
5. From the Groups box in the bottom left, highlight a required group, eg Dr Jane Mars, and use the arrow key  to add the group into the **Contained group** box (you can remove a group from the Contained group using ). Add any further required groups into Contained group.



- Click **OK** to finish. The new patient set, eg Female GPs, is now displayed above the timeline in a grid with date columns.



Patient Set – View Clinical Data

- Highlight a date period, eg May 2009, to show the relevant patients in the bottom left-hand column (double click to show their clinical details in the right-hand column).
- Right clicking within the patient list shows the usual menu options of Sort, Print group and Save.

Apr 2010 | Age Sex | Prevalence | Incidence | **GP Analysis** | Generate | Audit Manager | QOF Reporting

Start Date: May 2009 | Registered GP | Usual GP | **Patient Set...**

No. of Periods: 12 | Use Defaults | Branch

	May 09	Jun 09	Jul 09	Aug 09	Sep 09	Oct 09	Nov 09	Dec 09	Jan 10	Feb 10
Branch 1	40	40	40	40	40	40	40	40	40	40
Female GPs	13	13	13	13	13	13	13	13	13	13
Salaried GP Registered Pats	27	27	27	27	27	27	27	27	27	27

William Allwood	16/09/1938	19/10/2005	Crescendo angin
Thomas Bell	04/09/1926	19/10/2005	Ischaemic heart c
Stuart Bolton	23/02/1948	19/10/2005	Coronary art bypa
Stephen Bowles	09/09/1934		Ischaemic heart disease Placed
Stanley Briggs	22/01/1955		
Shaun Bulmer	14/03/1954		
Rici Copley	23/07/1929		
Richard Corrigan	16/04/1932		
Philip Della Puppa	09/06/1935		
Peter Dove	14/10/1952		
Neville Foster	23/10/1949		
Michael Golton	20/09/1961		
Leslie Hoey	26/04/1948		
Kenneth Hurley	30/01/1938		
Isaiah K...	26/09/1922		

- No Sort
- Sort Patients by Surname
- Sort Patients by Date of Birth
- Reverse Sort
- Print This Group...
- Save This Group...
- Copy
- Open Consultation Mgr...


Right Click Options

Date Options

The GP Analysis data grid show the patient counts analysed by the selected option over time (prevalence), defaulting to the previous 12 months. To change this selection, click the **Use Defaults** box to remove the tick.

It is possible to view any number of periods in sequence. Select an alternative **Start Date** by selecting the month and/or year using the drop down lists. The earliest start period is January 1992. The **No. of Periods** option determines how many columns are displayed; select a number from the drop down list.

NOTE: If you add more columns than can be displayed on the screen, a scroll bar will be added below the data grid.

Use the Refresh icon  to update your data grid. To return to the default settings, click **Use Defaults**.

Oct 2009 | Age Sex | Prevalence | Incidence | **GP Analysis** | Generate

Start Date: November 2008 | Registered GP | Usual GP | Patient Set...

No. of Periods: 12 | Use Defaults | QOF Practice | Branch

	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09
Earth, Mel	0	0	0	0	0	0	0	0
Jupiter, Sarah	0	0	0	0	0	0	0	0
Mars, Jane	1	1	1	1	1	1	1	1
Neptune, Michael	0	0	0	0	0	0	0	0
Venus, Fiona	0	0	0	0	0	0	0	0
Total	1	1	1	1	1	1	1	1

Date Options

Display of results

The results will be displayed as a data grid and also a graph, which can be printed. By selecting an item in the data grid, you can view the relevant patients and save or print the group.

The counts in the total line are obtained by joining all the system groups in the preceding lines and combining this group with the audit line source group and chronolysing for each period. This is so that the total patient group contents can be listed.

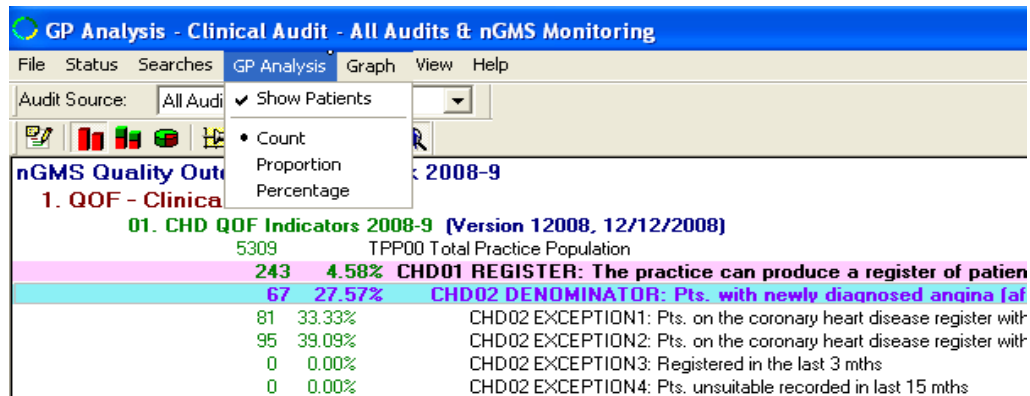
For each patient set, the last line of the grid will be a total for each period. Note that the right most total cell is unlikely to match the current group count displayed for the selected line in the clinical audit browser because not every patient may be included in a set or may be included in multiple sets.

The graph and patient list controls will always show the data corresponding to the currently selected data grid cell. For example, if the cell for Dr Green for Jan 08 is highlighted:

- The graph will show a column representing the count for each period, eg, Sep 07 to Aug 08 for Dr Green.
- The patients making up the count will be shown in the patient list.

Graph Options

When using the GP Analysis tab, select **GP Analysis** on the toolbar to display the graph options menu. This plots the counts for a selected line from the data grid. Standard Clinical Audit graph control can be used.



GP Analysis Graph Options

This function will enable you to view the data grid and graph using the following options:

- **Count** - The Y-axis is scaled to the absolute count value for each cell being represented.
- **Proportion** - The graph also shows the value for the selected lines base population as a stacked column. An audit line's parent line is defined in the audit. The Y access is scaled to include the base population count value.

- **Percentage** - The Y access is scaled to show the percentage value of the selected line against its base population. For example, if the current line value is 5 and the base population for the same period is 100, the value 5% is shown. For this view, the values in the grid are redisplayed as percentages. In this view the Total line the cell value represents the percentage of the total count against its base population count; it is not the sum of percentages. The grid in this view will look similar to the percentage view in the Age Sex tab.

Copy Function

A new facility has been created to enable you to copy grids and patient lists to Clipboard, where they can be pasted into other applications or documents eg. Microsoft Excel.

Copy Grid

Display a data grid eg. GP Analysis or Age Sex. Right click on the data grid, select copy table; the grid will now be copied to the Windows Clipboard in table format (tab separated).

	Nov 08	Dec 08	Jan 09	Feb 09	Mar 09	Apr 09	May 09	Jun 09	Jul 09	Aug 09	Sep 09	Oct 09
Earth, Mel	0	0	0	0	0	0	0	0	0	0	0	0
Jupiter, Sarah	16	19	22	29	35	40	45	54	56	56	63	64
Mars, Jane	21	21	24	27	38	44	44	50	51	51	56	59
Neptune, Michael	0	0	0	0	0	0	0	0	0	0	0	0
Venus, Fiona	21	23	30	34	44	56	63	73	81	91	100	103
Total	58	63	76	90	117	140	152	177	188	198	219	226

Data Grid - Copy Table

Copy Patient List

Display a patient list, right click and select **Copy** from the menu. The patient list will now be copied to the Windows Clipboard. The following patient details will be included in the (tab separated) table: surname, forename and date of birth.

Surname	Forename	Date of Birth	Clinical Data
Vera	Curbush	26/12/1930	
David	Daniel	16/12/1934	
Mark	George	09/05/1967	
Robert	Gerald	05/10/1942	
Muriel	Hockaday	11/04/1931	
Shane	Jacob	29/05/1940	
Harry	John	14/11/1924	
Malcolm	Paul	04/02/1930	
Trevor	Paul	07/09/1946	
Alan	Ronald	23/06/1942	
Calum	Timothy	28/11/1946	
New	Yohannes	21/10/1940	

14/03/1994	Angina pectoris	
23/08/2008	Severe cholester...	3.32

Patient List - Copy Table

When a patient is selected in the patient list, the relevant clinical data can be viewed in a column on the right. This clinical data can also be copied to the Windows Clipboard. Right click on the data and select either: Copy (keep all columns) or Copy (no empty columns). The data is now copied to Windows Clipboard.

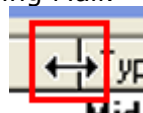
Mail Manager Enhancements

Column Resizing

It is now possible to resize a column by double clicking on the column separator. This will resize the column to the largest data in that column or to the column header, (whichever is the larger). The columns return to original size on exit.

To Resize a Column

1. In Mail gaManager, select Mail to view eg Incoming Mail.



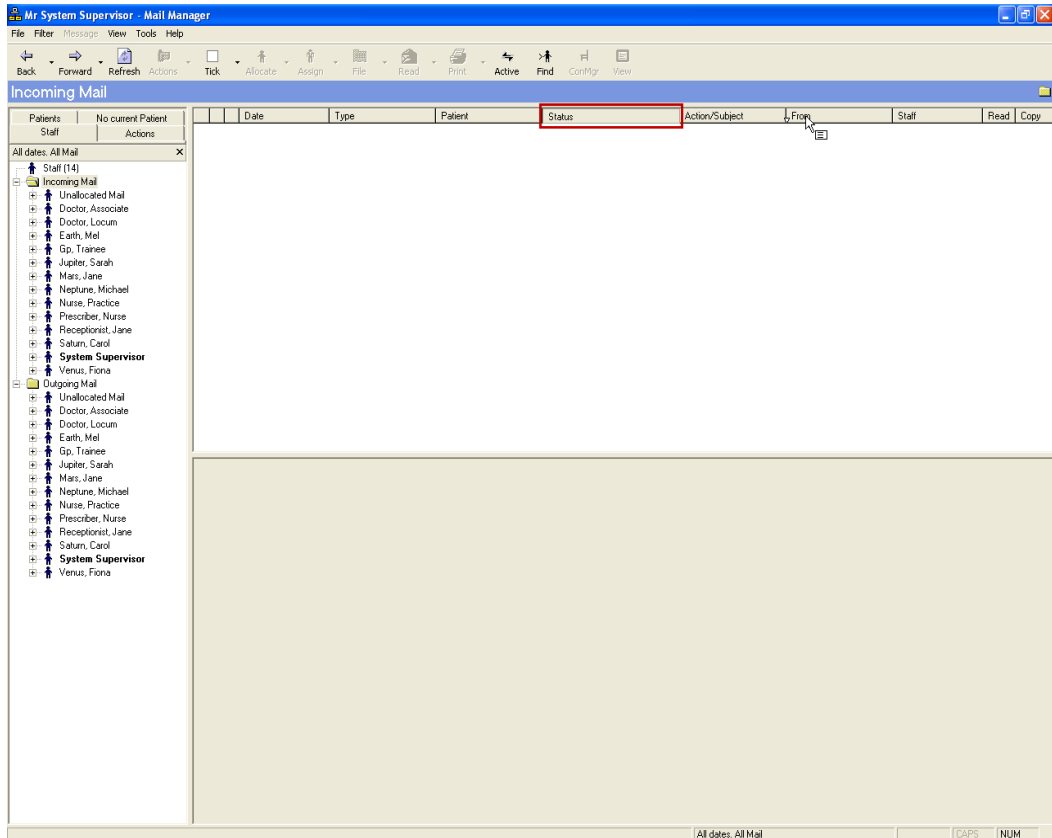
2. Point to the column separator, when the arrows appear double click on the separator, the column will resize to the largest data or column header.
3. The column will return to original size on exit.

Patients	No current Patient	Date	Status	Type	Read	Staff	Patient
		17/06/2010 09:21	Available for filing	Mid Stream Urine	<input type="checkbox"/>	Saturn, Carol	Francis, Anthony 09/06/1964
		17/06/2010 09:21	Available for filing	Mid Stream Urine	<input type="checkbox"/>	Saturn, Carol	Nutkins, Race 28/04/1959
		17/06/2010 09:21	Available for filing	Semen	<input type="checkbox"/>	Saturn, Carol	Kenneth, William 23/08/1966
		17/06/2010 09:21	Available for filing	Throat Swab	<input type="checkbox"/>	Saturn, Carol	Edmund, Jesse 07/10/1992
		17/06/2010 09:21	Available for filing	Mid Stream Urine	<input type="checkbox"/>	Saturn, Carol	Gimshaw, Janis 12/03/1973
		17/06/2010 09:19	Filed	Serum cholesterol	<input type="checkbox"/>	Saturn, Carol	Dalglish, Cora 05/07/1943
		17/06/2010 09:19	Available for filing	Serum protein electrophoresis	<input type="checkbox"/>	Saturn, Carol	Easterbrooke, Aimee 05/07/1946
		17/06/2010 09:19	Available for filing	24H URINE PROTEIN	<input type="checkbox"/>	Saturn, Carol	Tappenden, Alison 08/04/1962
		17/06/2010 09:19	Available for filing	Serum lipids	<input type="checkbox"/>	Saturn, Carol	Ian, Benjamin 24/08/1925
		17/06/2010 09:19	Available for filing	Plasma glucose level	<input type="checkbox"/>	Saturn, Carol	Talbot, Victoria-Marie 25/08/1995
		17/06/2010 09:19	Available for filing	Urea and electrolytes	<input type="checkbox"/>	Saturn, Carol	Eamonn, Oakley 11/02/1937
		17/06/2010 09:19	Available for filing	Urea and electrolytes	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, Seven 01/01/194
		17/06/2010 09:18	Available for filing	Serum TSH level	<input type="checkbox"/>	Saturn, Carol	*Haddock, Mary 29/01/1937
		17/06/2010 09:17	Available for filing	Serum cholesterol	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, Seven 01/01/194
		17/06/2010 09:17	Available for filing	Serum protein electrophoresis	<input type="checkbox"/>	Saturn, Carol	Easterbrooke, Aimee 05/07/1946
		17/06/2010 09:17	Available for filing	24H URINE PROTEIN	<input type="checkbox"/>	Saturn, Carol	Tappenden, Alison 08/04/1962
		17/06/2010 09:17	Available for filing	Serum lipids	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, Three Zoe
		17/06/2010 09:17	Available for filing	Plasma glucose level	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, Two 29/02/1964
		17/06/2010 09:17	Available for filing	Urea and electrolytes	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, One John
		17/06/2010 09:17	Available for filing	Urea and electrolytes	<input type="checkbox"/>	Saturn, Carol	*Editestpatient, Seven 01/01/194

Mail Manager

Change Column Order

The order of the columns in Mail Manager can now be changed and customised to suit each user. Click on the Column header you wish to move, then keeping the mouse button depressed move the column to the required position. The column positions will be saved on exit.




Mail Manager

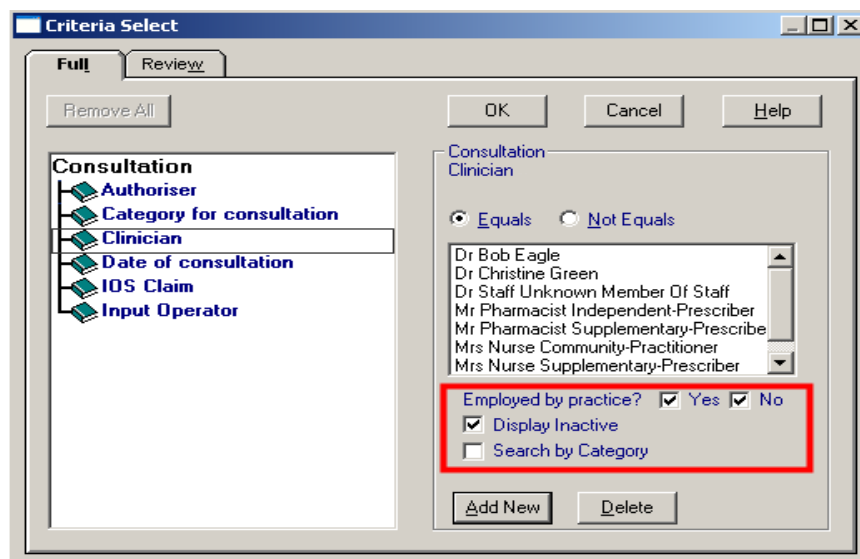
Click this link for a demonstration video: <http://www.screencast.com/t/Mz3fM0yRd>

Search and Reports Enhancements

Ad-hoc Searching – Criteria Select

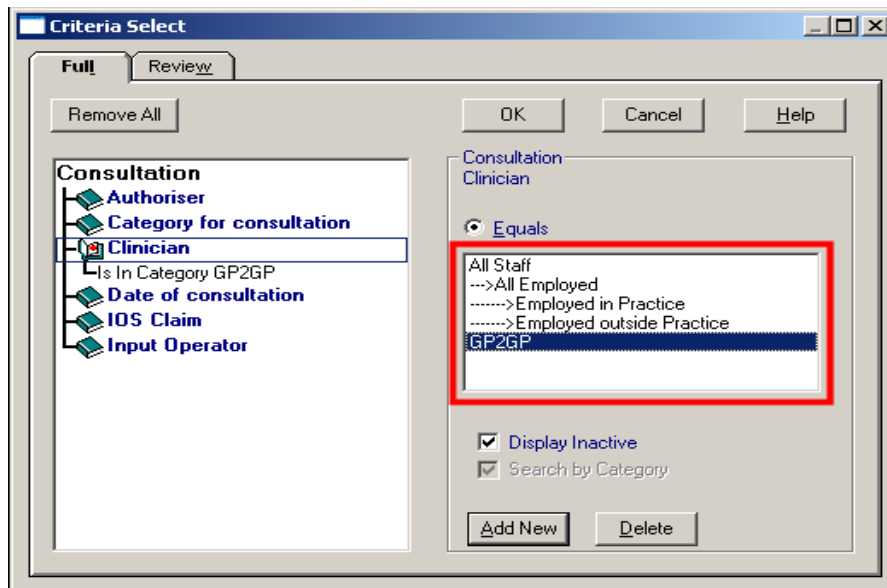
An enhancement has been added to Criteria Select to enable searching by staff category.

1. Go to **Vision – Reporting – Search and Reports**.
2. Click the **New Ad-Hoc Search**  icon. Use the **Add Entity** button to add data categories to your search.
3. Highlight the Entity and click **Selections**.
4. Select the required staff data area on the **Criteria Select** screen, for example, Authoriser, Clinician, Responsible Partner.
5. Click **Add New**. Click **Search by Category**.



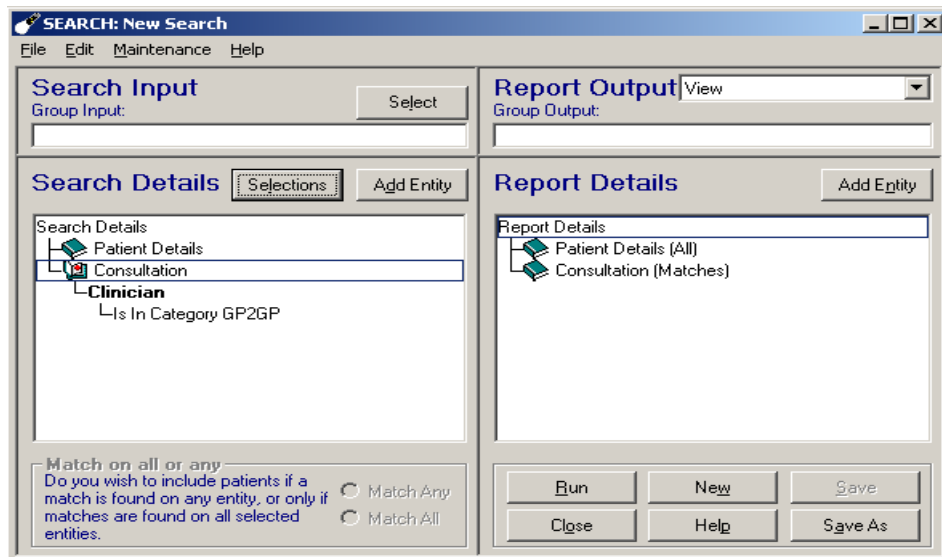
Criteria Select

6. Highlight the required category, for example, GP2GP.



Criteria Select – Staff Category

7. Click **OK**. Click **Run** to run the search.



Ad-Hoc Search