


Managing Messages in Vision – VES Practices

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Mail Gateway – Daily Checks

On a daily basis you should log into the EDI account on any computer and open the Mail Gateway.

Check the traffic lights on the Clinical Scheduler and the date it was last run. Also, check the traffic light icons:

-  Clinical Schedule – (green traffic light) Means that the last schedule ran without problems.
-  Clinical Schedule - (red traffic light) Means there was a problem during the last scheduled run, view the log for details. This will not prevent the next schedule from running, but it will probably suffer the same problem if it has not been resolved.

Note Please ensure that you keep Mail Gateway open during business hours to allow for the efficient flow of messages

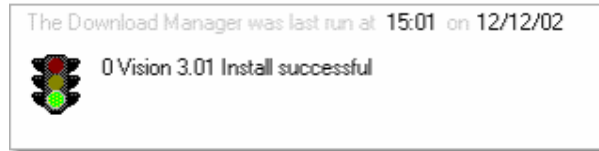
Mail Gateway Checks Particular to Scotland – Daily Checks

- It is IMPERATIVE that the SCI DC messages are checked on a DAILY basis. Please check the date and that the transmissions are successful and report any errors by email to the INPS Helpdesk via email.
- For ECS messages, please also check the date and that the transmission was successful and report any errors to the INPS Helpdesk via email.

Mail Gateway – Download Manager – Daily Checks

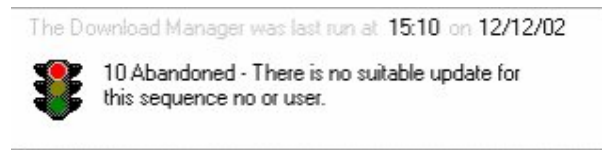
Vision DLM upgrades are managed by the VES team and cannot be manually downloaded. These downloads contain software and drug and read dictionary updates.

- Download Manager– The green traffic light indicates that the last DLM schedule ran without problems



A message similar to 0 Vision 3.01 Install successful is shown when a new update has been downloaded and successfully installed

- Download Manager – The red traffic light indicates that there was a problem during the last scheduled run, view the log for details. This will not prevent the next schedule from running, but it will probably suffer the same problem if it has not been resolved.



A message similar to 10 Abandoned - There is no suitable update for this sequence no or user means that your system is currently up to date. Download Manager should be left to continue to run and will download future updates as they are made available.

If you want to check which DLM sequence you are currently using Go to the front screen of Vision help-about to see your current DLM sequence.



Note DLM user guides can be downloaded from the company website www.inps.co.uk from Client Zone – DLM – Vision DLM. They are listed by sequence number.

Rebuild Folders Weekly

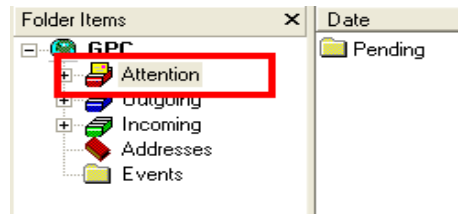
Rebuild Folders

Rebuild Folders should be run regularly once a week and if any errors are found, you should immediately turn off GPC and Mail Gateway and contact the HelpLine. It is a Microsoft utility which tidies up some problems that may occur with Personal Folders.

GPC – Daily Checks:

The GPC automatically transmits and received registration links, pathology results, IOS and SCI DC and ECS (for Scottish practices). It is important that this is checked daily. The GPC is opened from the front screen of Vision Messaging – GP Communicator and can only be accessed whilst you are logged into the account as EDI, although you can login to the Vision software as your own named account.

- Check Attention folder for message status in error. For message status in error please refer to Help – contents – error resolution - quick reference to successful and error messages in the GPC module, where instructions on how to deal with each error message can be found.



- Successful messages can be seen in the incoming and outgoing folders with the status of Complete.

Mail Manager – Daily Checks

As Mail Manager is used, amongst other things, to manage all incoming and outgoing National Programme and other various messages (ETP, CaB, GP2GP, National Summary, XML Pathology, OOH etc), it is vital that you keep up to date with the following housekeeping requirements.

Incoming Mail

- Allocate mail to patients and staff and file where if necessary
- Read and action messages

Outgoing Mail

- Check the status of each message (most successful messages will read complete)
- Deal with any unsuccessful messages (see onscreen help for further information)

IMPORTANT All users who log into Vision with a Smart card should keep Mail Manager open at all times so that messages are constantly processed.

Archiving

- All completed mail should be archived on a regular basis.

How to archive

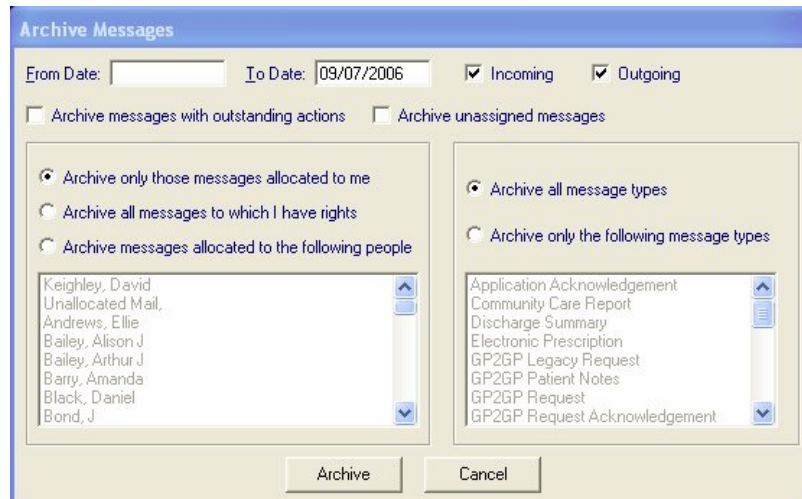
Messages can be removed from the live database using File - Archive or by right clicking on a message and selecting Archiving. By using View - Archive View, archived messages may be retrieved at any time.

1. Select File - Archive.
2. Select the criteria for archiving:

From Date / To Date - You can select the date from which archiving should start and the range it covers. Note that the To Date defaults to one month ago.

Incoming - By default, both incoming and outgoing messages will be archived. Unchecking the Incoming box prevents incoming messages from being archived. We suggest you leave this checked.

Outgoing - By default, this box is checked. Unchecking the Outgoing box prevents Outgoing messages from being archived. We suggest you leave this checked.



Archive messages with outstanding actions - By default, this is unchecked, which means that messages with outstanding actions will not be archived. Checking the box allows messages with outstanding actions to be archived as well as those without outstanding actions.

Archive unassigned messages - By default, a message will not be archived unless it has been assigned to a patient. By default the box is unchecked. If checked, unassigned messages will be archived as well as assigned messages.

Archive only those messages allocated to me - By default, only those messages allocated to the current user will be archived.

Archive all messages to which I have rights - Checking this will allow all messages to which the user has rights (those appearing on the Staff tab) to be archived.

Archive messages allocated to the following people - If this is checked, then the multiselect list box below is enabled. You must select at least one entry from this list. The list is mailboxes that you have rights to view.

Archive only the following message types: If this is checked, then you can select from the list, and at least one entry must be selected. Use Control-click to make multiple selections. For GP2GP Messages:











- We suggest you tick GP2GP Request, GP2GP Patient Notes and PDS Updates and let the system decide whether each message is valid for archiving.
- You can also tick Record Transfer, Record Transfer Acknowledgement, Record Transfer Rejection, Record Transfer Request, Record Transfer Request Rejection.
- You may want to leave GP2GP Request Acknowledgement unchecked so that you can follow up on these later.
- Ignore GP2GP Legacy Request which is not currently being used.






3. Click Archive to start the archiving process.

See Mail Manager Quick Reference Guide for further details on Archiving.






Managing Mail Manager Messages

In order to assist with managing Mail Manager messages, the list below indicates by message type how to deal with both successful and unsuccessful messages.

	Successful message status	Unsuccessful message status	Notes								
General	<p><input type="checkbox"/>  Complete</p> <p>Messages with a status of complete are fully processed and can be archived if required.</p> <p><input type="checkbox"/>  Sent awaiting acknowledgem..</p> <p>Messages with a status of Sent awaiting acknowledgement have not yet received a successful acknowledgement from the Spine. These messages should be monitored as successful messages will normally have a status of Complete.</p>	<p><input type="checkbox"/>  Transmission error</p> <p>Should the message status read "Transmission Error" details of the error are available in the Audit tab. To rectify this you can right click on the message and choose Reprocess.</p> <p><input type="checkbox"/>  Processing error</p> <p>Should the message be rejected, the status becomes "Processing Error" and details are available in the audit tab. Again you can choose to Reprocess the message.</p>	<p>It is advisable that all unsuccessful messages are dealt with on a daily basis due to the volume of messages that pass through the Mail Manager Interface. It is also important that messages are regularly archived.</p>								
ETP Messages	<table border="1" data-bbox="483 1193 934 1258"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/>  Sent</td> <td>Parent Prescription</td> </tr> </tbody> </table> <p>For an ETP message, when the status reads Sent this means that Mail Manager has</p>	Status	Type	<input type="checkbox"/>  Sent	Parent Prescription	<table border="1" data-bbox="1050 1201 1480 1266"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/>  Processing error</td> <td>Parent Prescription</td> </tr> </tbody> </table> <p>If there is any error for an ETP message, this normally means that</p>	Status	Type	<input type="checkbox"/>  Processing error	Parent Prescription	<p>In Tools - Options - Message in Mail Manager, if you leave Show Sent Electronic</p>
Status	Type										
<input type="checkbox"/>  Sent	Parent Prescription										
Status	Type										
<input type="checkbox"/>  Processing error	Parent Prescription										

	Successful message status	Unsuccessful message status	Notes
	<p>completed all processes for the message. The message is now on the Spine where it will stay until it is downloaded by the pharmacist.</p>	<p>there has been a disruption between Mail Manager and the Spine and is usually due to the prescriber not being logged into Vision with their Smartcard.</p> <p>ETP errors can now be archived if required by right clicking on the message and selecting Archive – Archive.</p>	<p>Prescriptions <u>UNTICKED</u>, this will only display ETP messages that are unsuccessful or error messages, and hide successful messages; this will improve performance and declutter your screen.</p>
Choose and Book Messages	 <p>C&B Referral Messages with a status of complete are fully processed and can be archived if required.</p>  <p>C&B Messages with a status of Sent awaiting acknowledgement have not yet received a successful acknowledgement from the Spine. These messages should be monitored through the CaB Activity List.</p>	 <p>If there is a processing error with a C&B referral message, you can look in the audit tab to view the details and if necessary, reprocess the message from the right click menu.</p>	<p>Checking the activity list from the CAB website on the progress of eBooking referrals will also be an indicator of the referral message progress.</p>
GP2GP	<p>Outgoing GP2GP Messages</p>  <p>GP2GP Messages with a status of Sent</p>	<p>Incoming unsuccessful GP2GP Messages</p>  <p>The Request Rejected status appears</p>	<p>If you are sending attachments in a GP2GP transfer, you need to make sure that any attachment</p>

	Successful message status	Unsuccessful message status	Notes																
	<p>awaiting acknowledgement have not yet received a successful acknowledgement from the Spine. These messages should be monitored as successful messages will have a status of Complete.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Complete</td> <td>GP2GP Request</td> </tr> </tbody> </table> <p>GP2GP Messages with a status of complete are fully processed and can be archived if required.</p> <p>Incoming GP2GP Messages</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Available for filing</td> <td>Record Transfer</td> </tr> </tbody> </table>	Status	Type	<input checked="" type="checkbox"/> Complete	GP2GP Request	Status	Type	<input type="checkbox"/> Available for filing	Record Transfer	<p>when a matching patient for the GP2GP message cannot be found.</p> <p>For Transmission Errors, there are numerous reasons why this might occur. Check the audit trail to see the details of the error. Usual errors are connected to the file sizes of outgoing attachments (you must not exceed 99 attachments) or the message is too big (5MB is the limit.). For other Transmission Errors, you can select Reprocess from the right click menu.</p>	<p>documents are as compact as possible. In particular, Word processing documents have the potential to be very large, especially if they incorporate images or pictures in the header or background. If at all possible, attached WP documents should be text only.</p>								
Status	Type																		
<input checked="" type="checkbox"/> Complete	GP2GP Request																		
Status	Type																		
<input type="checkbox"/> Available for filing	Record Transfer																		
PDS Updates	<table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Complete</td> <td>PDS General Update</td> </tr> </tbody> </table> <p>PDS Messages with a status of complete are fully processed and can be archived if required.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Sent awaiting acknowledgement...</td> <td>PDS General Update</td> </tr> </tbody> </table> <p>PDS Messages that have a status of Sent awaiting acknowledgement haven't yet been received by the spine. This should automatically update to read Complete once transmission is complete.</p>	Status	Type	<input checked="" type="checkbox"/> Complete	PDS General Update	Status	Type	<input type="checkbox"/> Sent awaiting acknowledgement...	PDS General Update	<table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Processing error</td> <td>PDS General Update</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Transmission error</td> <td>PDS General Update</td> </tr> </tbody> </table> <p>Should the message status read "Transmission Error" details of the error are available in the Audit tab. To rectify this you can right click on the message and choose Reprocess.</p>	Status	Type	<input type="checkbox"/> Processing error	PDS General Update	Status	Type	<input type="checkbox"/> Transmission error	PDS General Update	<p>In Tools - Options - Message in Mail Manager, if you leave Show Sent PDS <u>UNTICKED</u>, this will only display messages that are unsuccessful or error messages, and hide successful messages; this will improve performance and declutter your screen.</p>
Status	Type																		
<input checked="" type="checkbox"/> Complete	PDS General Update																		
Status	Type																		
<input type="checkbox"/> Sent awaiting acknowledgement...	PDS General Update																		
Status	Type																		
<input type="checkbox"/> Processing error	PDS General Update																		
Status	Type																		
<input type="checkbox"/> Transmission error	PDS General Update																		

	Successful message status	Unsuccessful message status	Notes
		 <p>If the status Sent awaiting acknowledgement does not change, there might be a problem with the message. Right click and reprocess if possible to resend the message. If this problem is persistent, please contact the Helpline.</p>	
Summary Care Record (SCR) Messages	 <p>SCR Messages with a status of complete are fully processed and can be archived if required. Once the status is complete the National Summary can be accessed from Consultation Manager.</p>  <p>Note that for the Initial Upload the National Summary facility will be unavailable on the patient record until a successful acknowledgement has been received.</p>  <p>SCR Messages that have a status of Sent awaiting acknowledgement haven't yet been received by the spine. This should automatically update to read Complete once transmission is complete and the SCR</p>	 <p>Should the message status read "Transmission Error" details of the error are available in the Audit tab. To rectify this you can right click on the message and choose Reprocess. If this error persists please contact the Helpline.</p>	<p>In Tools - Options - Message in Mail Manager, if you leave Show GP Summary Messages <u>UNTICKED</u>, this will only display messages that are unsuccessful or error messages, and hide successful messages; this will improve performance and declutter your screen.</p> <p>Note that the initial upload SCR messages should automatically archive unless there is an error.</p>

	Successful message status	Unsuccessful message status	Notes																
	<p>will then be available from Consultation Manager.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Withdrawn</td> <td>GP Summary</td> </tr> </tbody> </table> <p>SCR messages with a status of withdrawn mean that a user has withdrawn the patients National Summary that was queued to be sent to the Spine.</p>	Status	Type	<input type="checkbox"/> Withdrawn	GP Summary														
Status	Type																		
<input type="checkbox"/> Withdrawn	GP Summary																		
XML Pathology England	<p>With XML Pathology, there are a number of status that are possible which reflect that a successful pathology message has been received. but have different filing/allocation status:</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Available for filing</td> <td>Serum</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Filed</td> <td>Serum lipids</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Partially filed</td> <td>Serum lipids</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th>Status</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Considered filed as co...</td> <td>Mid Stream Urine</td> </tr> </tbody> </table>	Status	Type	<input type="checkbox"/> Available for filing	Serum	Status	Type	<input type="checkbox"/> Filed	Serum lipids	Status	Type	<input type="checkbox"/> Partially filed	Serum lipids	Status	Type	<input type="checkbox"/> Considered filed as co...	Mid Stream Urine	<p>For incoming XML Pathology there is generally no reason why the messages would go into error. If you notice anything unusual, please contact the Helpline.</p>	<p>See Mail Manager Help for further instruction on dealing with XML Pathology messages.</p>
Status	Type																		
<input type="checkbox"/> Available for filing	Serum																		
Status	Type																		
<input type="checkbox"/> Filed	Serum lipids																		
Status	Type																		
<input type="checkbox"/> Partially filed	Serum lipids																		
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