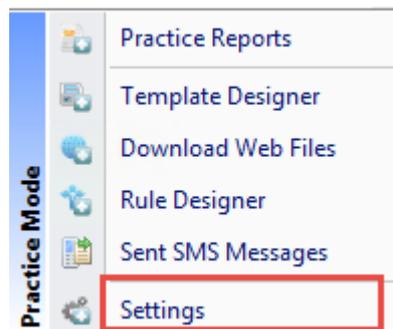


Configuration and Settings for Vision+

There are several configuration settings that help you to use Vision+. Changes made from within the settings screen are user specific. The one exception is the cervical recall period which is a global setting for the practice.

This quick reference guide explains all the setting options available.

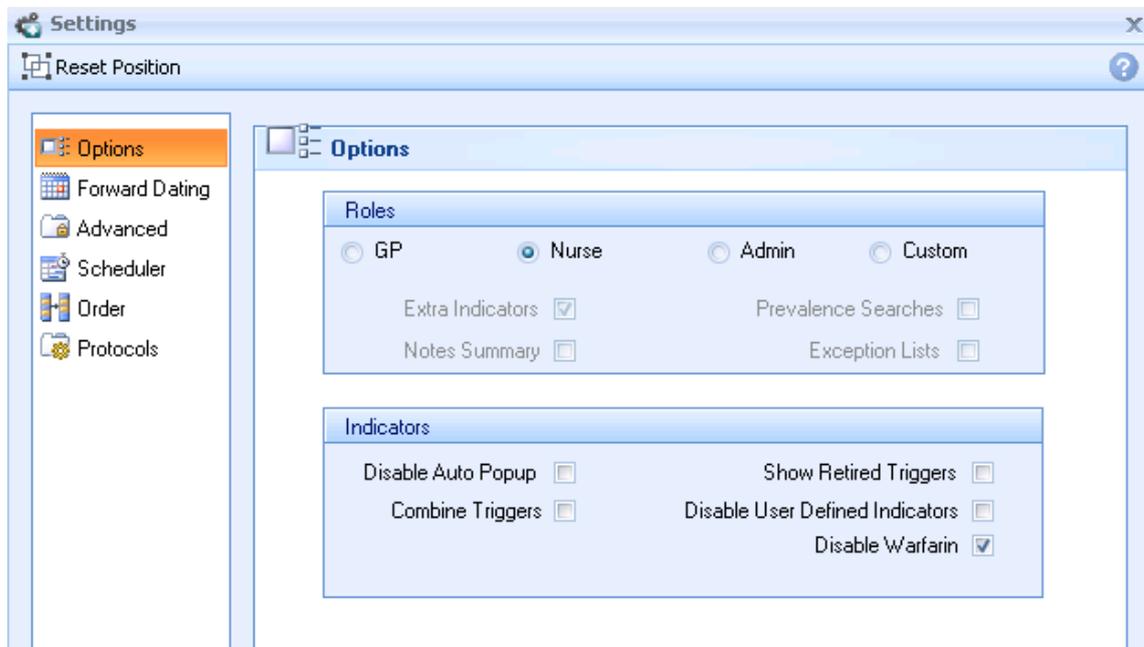
1. Login to Vision. From the Windows Notification Area, right click on the Vision+ icon  and select **Settings**.



Accessing the Vision+ Settings Screen

 **Note** - To access the Vision+ Setting screen, you must not have a patient selected in Consultation Manager else the patient-specific menu displays.

2. The Settings Configuration screen is displayed.



Settings screen

3. Any changes made to the settings should be saved by clicking **OK**.

Reset Position

If the alert indicator popup screen is moved and resized, this information is saved. You can use the reset position  **Reset Position** to reset the alert screen back to the original position and size. This is especially useful if the screen has been moved out of view by accident.

Options

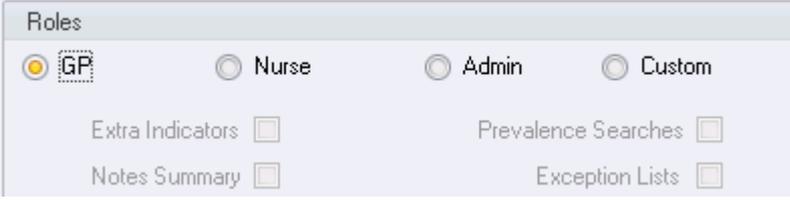
The Options tab on the settings screen contains configuration parameters which dictate how Vision+ behaves and appears on your screen.

Roles

Roles

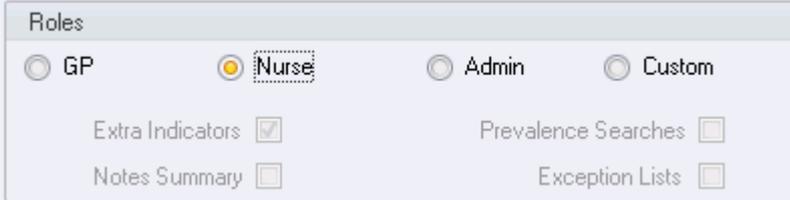
By selecting the appropriate role the pre-defined set of options are selected. Below are a summary of the roles and an explanation of the options associated with them:

- **GP** - If you set the role to GP you only see clinical indicators.
- **Nurse** - Extra Indicators cover disease monitoring prompts such as annual reviews. Selecting the Nurse role enables these extra prompts on the alerts screen and allows you to run the Extra Indicators report in Patient Reports.
- **Admin** - Selecting Admin enables the prompts for both Notes Summary and Prevalence on the alert screen. You can also look at the Prevalence and Exception lists in Practice Reports.
- **Custom** - You can use Custom to set your own specific settings.



The screenshot shows the 'Roles' settings panel. At the top, there are four radio buttons: 'GP' (selected), 'Nurse', 'Admin', and 'Custom'. Below the radio buttons, there are four checkboxes: 'Extra Indicators' (unchecked), 'Notes Summary' (unchecked), 'Prevalence Searches' (unchecked), and 'Exception Lists' (unchecked).

GP Role



The screenshot shows the 'Roles' settings panel. At the top, there are four radio buttons: 'GP', 'Nurse' (selected), 'Admin', and 'Custom'. Below the radio buttons, there are four checkboxes: 'Extra Indicators' (checked), 'Notes Summary' (unchecked), 'Prevalence Searches' (unchecked), and 'Exception Lists' (unchecked).

Nurse Role

Roles	
<input type="radio"/> GP	<input type="radio"/> Nurse
<input checked="" type="radio"/> Admin	<input type="radio"/> Custom
Extra Indicators <input type="checkbox"/>	Prevalence Searches <input type="checkbox"/>
Notes Summary <input checked="" type="checkbox"/>	Exception Lists <input type="checkbox"/>

Admin Role

Roles	
<input type="radio"/> GP	<input type="radio"/> Nurse
<input type="radio"/> Admin	<input checked="" type="radio"/> Custom
Extra Indicators <input checked="" type="checkbox"/>	Prevalence Searches <input checked="" type="checkbox"/>
Notes Summary <input checked="" type="checkbox"/>	Exception Lists <input checked="" type="checkbox"/>

Custom Role

The four options available are listed below:

- **Extra Indicators** - Select this checkbox to view indicators.
- **Notes Summary** - Select this checkbox to view the notes summary indicator.
- **Prevalence Searches** - Select this checkbox to view tidy-up register searches.
- **Exception Lists** - Select this checkbox to list all patients who are exception read coded from the various categories.

Indicators

Indicators control how the Alert Indicator window appears and what is displayed within it. By default only the Warfarin box is ticked. Below is a summary of the options:

Indicators	
Disable Auto Popup <input type="checkbox"/>	Show Retired Triggers <input type="checkbox"/>
Combine Triggers <input type="checkbox"/>	Disable User Defined Indicators <input type="checkbox"/>
	Disable Warfarin <input checked="" type="checkbox"/>

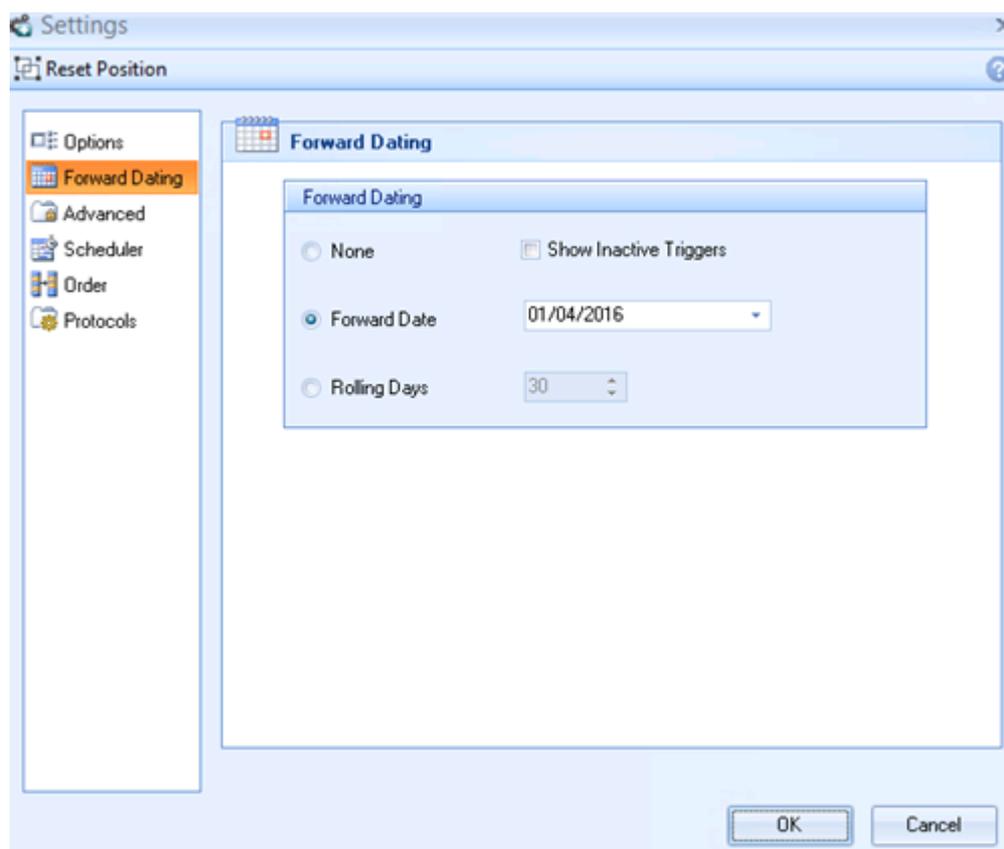
Indicators

- **Disable Auto Popup** - If you check this box the Alert Indicator screen does not appear when you select a patient. If you have disabled the Alert you can still view it by selecting the QOF  icon on the toolbar.
- **Combine Triggers** - If Combine Triggers is selected the QOF alert and any other Vision+ tools you are using such as NICE, Sign etc are combined into one tab which is displayed as a folder  icon on the Toolbar and at the top the Alert window.
- **Show Retired Triggers** - Select this box if you want to display retired QOF indicators in Vision + Alerts, Templates and Reports.

- **Disable User Defined Indicators** - Some practices have local care pathways installed in Vision+. The Disable User Defined Indicators is used to hide these care pathways so that only QOF alerts appear.
- **Disable Warfarin** - The Disable Warfarin option is automatically selected as the Warfarin program is a separate module in Vision+ that has to be purchased.

Forward Dating

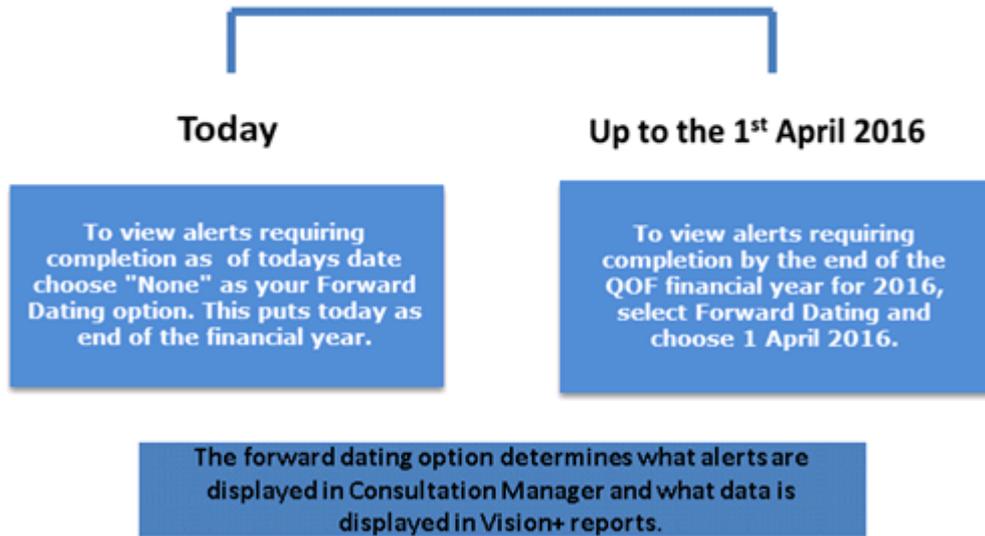
The Forward Dating Tab within the Settings screen provides three different options for forward dating of indicators. These options will change the information that you see displayed in the Alert Indicator window, Contract Templates and Patient Target Lists (the reference date is clearly shown on all of these screens). By default the Alert Indicator screen defaults to None (today's date.)



Forward Dating

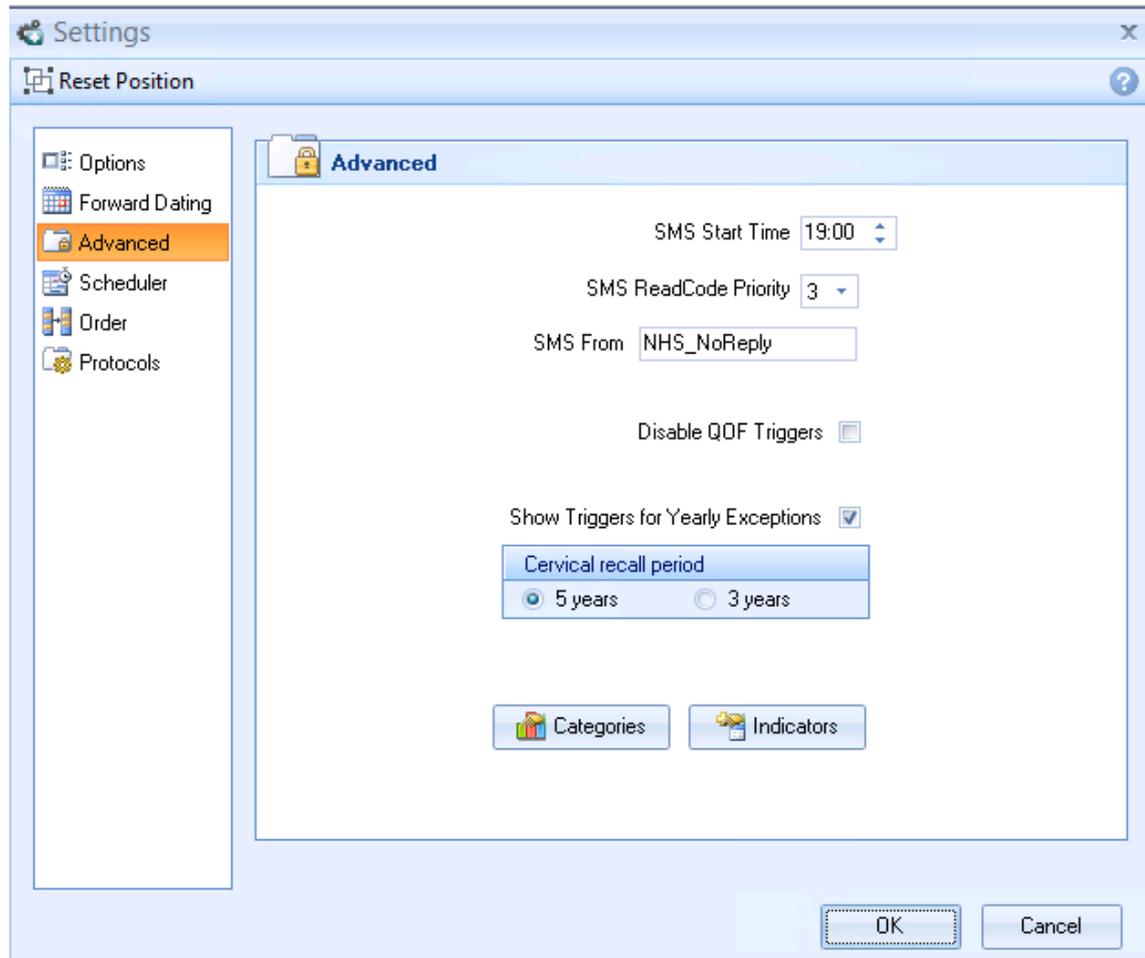
- **None** – If None is selected, the Alerts are set to today's date and text appears in black. Indicators in black text require completion because the data is currently outside the time period or has never been recorded.
- **Forward Date** – The Forward dating option shows those indicators that have already been completed as of today's date, but will need to be re-recorded before a specified reference date. You can set the date by using the calendar or entering a specific date.
- **Rolling Days** – If you choose the Rolling days option you can see those indicators that have already been completed as of today's date, but will need to be re-recorded within a specific number of days ahead. You can set the number of days using the Days field.

 **Note** - If you choose **Forward Date** or **Rolling Days**, you can also select the **Show Inactive Triggers** box. If this is selected you see text in light blue for those indicators you can't do now but you will need to record again before QOF year end.



Advanced Tab

The Advanced Tab is used to control advanced setting options. It includes the following:



Advanced Tab

- **SMS Start Time** - You can send automated Appointment Text Message Reminders. The text reminders are sent within a 3 hour window of the start time you enter in here.
- **SMS Read Code Priority** - When an SMS message is sent to a patient for a recall (Read codes are not added for appointment text messages), the Read code **9N3G SMS Text Message Sent To Patient** is recorded in the patient's journal. If required, change the SMS Read code priority default by selecting the priority number from the drop down list. The default priority is 3.
- **SMS From** - When text messages are sent, the text in this box displays as the message sender on the patient's phone. We recommend that you enter **NHS_NoReply** so that the patient knows where the SMS has come from. This also tells the patients they cannot reply to these automated SMS messages. You can however enter your practice name if required. Due to network constraints, there is an 11 character limit on this entry.
- **Disable QOF Triggers** - This option disables the QOF triggers from showing, either on the toolbar or the Contract Indicators screen.

- **Show Triggers for Yearly Exceptions** - Select this checkbox if you would like to see any previously recorded exceptions for the current QOF year. This is useful if you have previously used an exception code, but may want to record QOF data later.
- **Cervical recall period** - This button determines how often cervical smears are required. This setting is set to every 5 years by default, but a small number of health boards require this to be done every three years. Please contact your Health Board if you are unsure.
- **Categories Button** - Clicking this button provides another screen where you can select which whole categories they want to appear in the contract indicators screen by placing a check in the corresponding boxes.
- **Indicators Button** - Clicking this button provides another screen where you can specify which individual indicators within categories should be displayed in the contract indicators screen, in much the same way as the Categories button.

Scheduler

The Vision+ Scheduler is available to practices with their own server (LAN) practices. It enables you to run the Vision+ Practice Reports on a set date and/or time. The reports automatically run in the background and display the results on screen; this is particularly helpful for larger practices. In order for the reports to run you must be logged into Vision and not have a patient open in Consultation Manager.

The following reports can be scheduled:

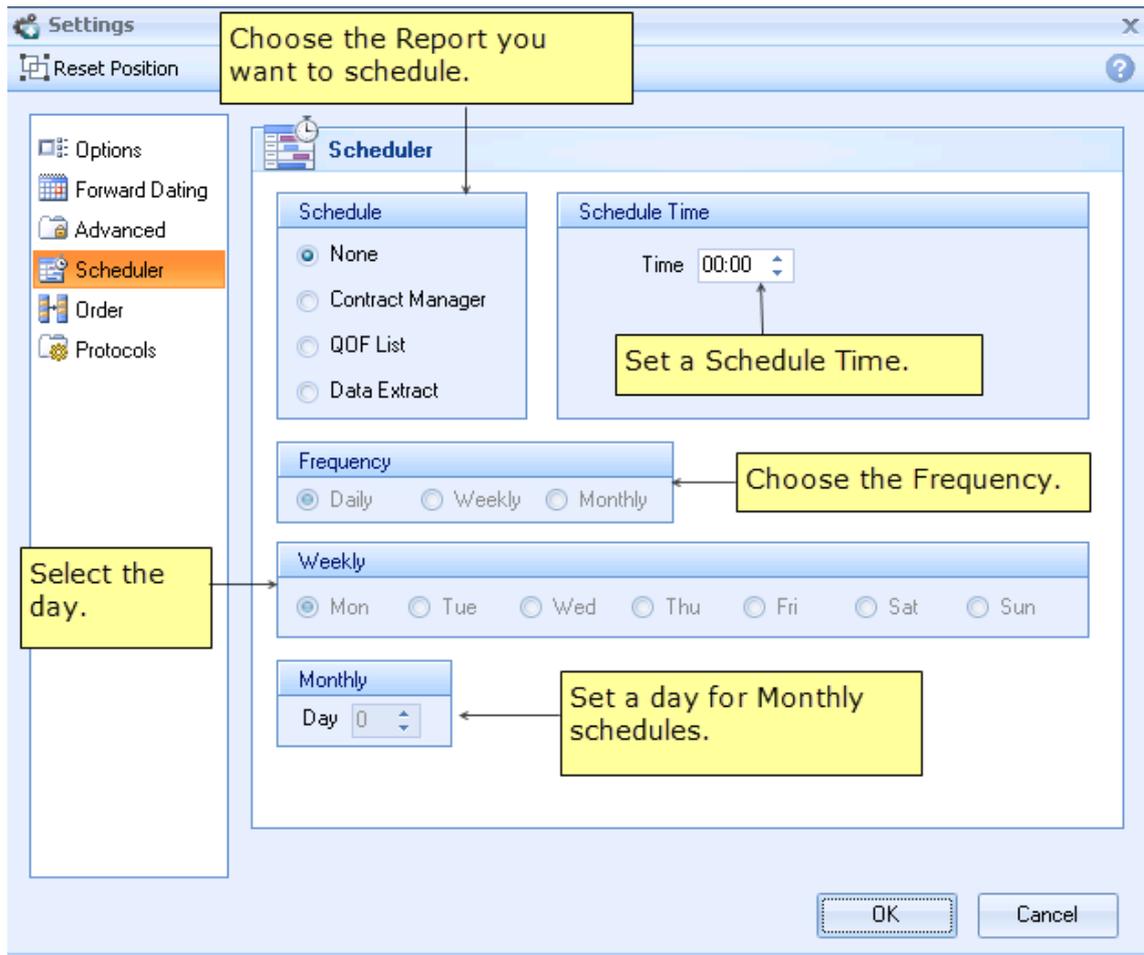
- **Contract Manager** - Contract Manager helps you to monitor your QOF performance over the year. It provides an overall view of your point totals for the practice and can be used to track aspirations. It also helps plan monthly workloads, show your practice prevalence and provide financial information. See Updating Contract Manager.
- **QOF Lists** - QOF Lists enable you to identify patients from multiple QOF areas who have outstanding indicators. It is equivalent to running the **All** report in Practice Reports. See Using Patient Target Lists.
- **Data Extract** - Data Extract allows data to be extracted into a CSV (Comma Separated Values) file. This file can then be forwarded on, if necessary, to Health Boards etc., who can analyse the data. See Data Extract.



Note - Practice Reports do not need to be open for the reports to run.

To Configure the Scheduler

1. Click **Scheduler**.



Scheduler

2. Tick the **Scheduled** report required, the options are:
 - Contract Manager
 - QOF List
 - Data Extract
3. Type the scheduled time in the 24 hour clock.
4. Select the **Frequency** - choose **Daily**, **Weekly** or **Monthly**.



Frequency

5. Select the day of the week.
6. For Monthly scheduled reports choose the day of the month



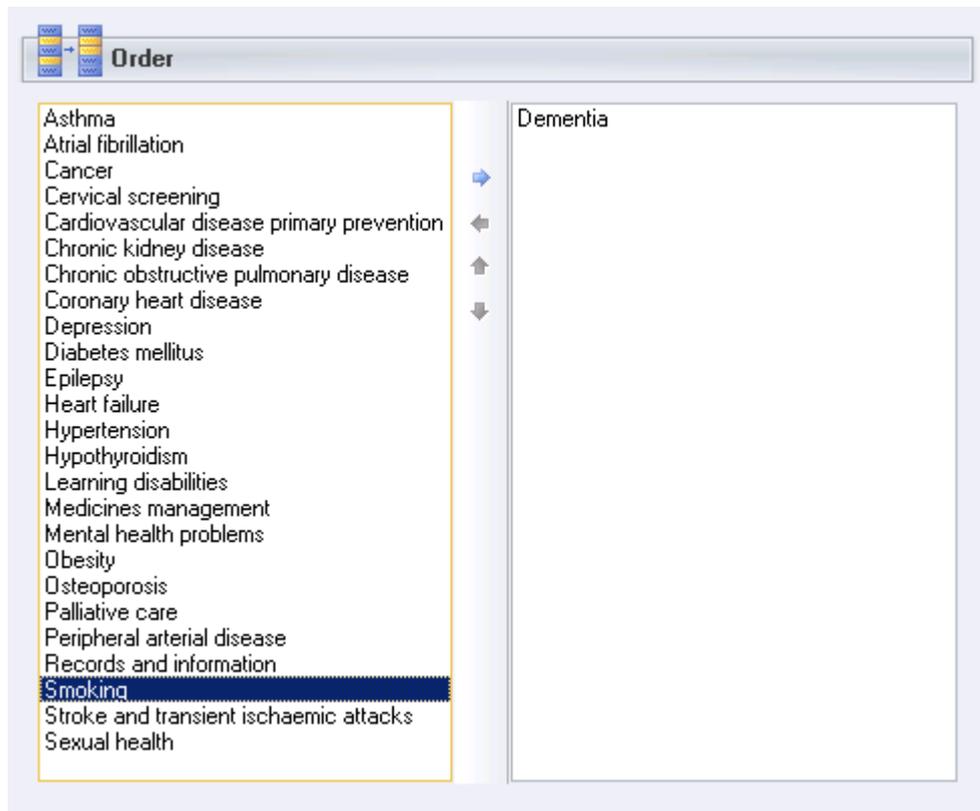
Monthly tasks

7. Click **OK** to save the changes.

 **Note** - The Scheduler settings are user specific so you only see your generated reports.

Order

The Order tab allows you to change the order of the categories that appear on the alert indicator screen. Highlight the category and use the blue arrow  icon to move it to the right hand site. Everything else follows in alphabetical order.



The Order tab

Protocols

Protocols are currently not used in Vision+.