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## Preparing for VOS

The following topics contain helpful overview information and tips to help make the introduction of Vision Online Services (VOS) easier for your practice and online users.

- **Considerations before Going Live** (page 1)
  - Things you need to plan before going live
- **Advertising VOS (page 3)**
  - Making your patients aware of VOS and the services available
- **Practice and Patient Resources** (page 4)
  - Links to user guides, VOS patient leaflet and VOS Registration form
- **Patient Registration Overview and Considerations** (page 4)
  - At the Practice - Registering a Patient to Use VOS
  - Patients - Registering and Activating their Online Account

### Considerations Before Going Live

Before going live with Vision Online Services you will need to consider the following:

#### Configuration

- Have you enabled Vision Online services?
- What are you going to say in the practice welcome message displayed when patients log in to VOS?
- Are you going to send emails and text messages for appointments and repeats confirmations?

For full VOS configuration details see the Vision Online Services Practice Configuration User Guide [here](#)

(<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>).

#### Registration

- Do you want to change the expiry duration of patient registration letters and unactivated accounts from the default 30 days?
- Do you want to change the patient registration letter within Vision Word Processor?
- How are you going to give the registration letter to the patients (email; post; hand it to them at the practice; download from practice website)?

See *Patient Registration Overview and Considerations* (page 4) for more details.

For full information on how to register your patients for VOS, see the Vision Online Services Practice Configuration User Guide and the Vision Online Services Registration User Guide [here](http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>).

### **Online Appointments**

- What are you going to say in the practice Appointments message that your patients will see when accessing Online Appointments?
- How many appointments will you allow the patient to DNA before you prevent access to Online Appointments?
- What will be the maximum number of appointments patients can book?
- How far in the future will you allow appointments to be booked?
- Are you going to allow weekend bookings?
- Are you going to use text messaging for appointment confirmations and reminders?
- Are you going to allow patients to send free text messages with their bookings?
- Have you set up Online Appointment cancellation settings?
- What appointment cancellation reasons do you want patients to select from?
- What staff members will have Online Appointments bookings?
- Are you going to create online bookings for clinics?
- Are you going to link your Appointments sessions to a location?
- Have you reserved which appointments slots will be available online?
- Are you going to define the slot type name displayed to patients in Online Appointments?
- Are you going to have specific slots eg travel clinic?
- What staff resources will you allocate to managing the appointments slots, registering patients, helping patients with the new service and checking for patients with locked accounts?

For full information on how to set up Online Appointments, see the Vision Online Services Practice Configuration User Guide and the Vision Online Services Online Appointments User Guide [here](http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>).

### **Online Repeats**

- What are you going to say in your practice Prescription message that your patients will see when accessing Online Repeats?
- Are you going to define how far back patients can see their repeat history?
- Are you going to allow patients to send a free text message with their repeat request?
- Have you allocated staff to processing online repeat requests and checking for messages sent with requests (if enabled)?
- Have you defined the Old Repeat Offset duration which determines what repeat a patient can order based on the date the repeat was last ordered?



For full information on how to set up Online Repeats, see the Vision Online Services Practice Configuration User Guide and the Vision Online Services Online Repeats User Guide [here](#) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>).

## Advertising VOS

It is important that your patients know about VOS and the services on offer (especially as it counts towards your enhanced payments in some parts of the UK) - and there are many ways you can get this information to them:

- **Leaflets** - Practice Leaflets can be modified to include VOS information.
- **Repeat re-order forms** - Add a message to the re-order form advising that you are now using Online Services and encouraging patients to use VOS Online Repeats.
- **Practice website** - Use your practice website to inform and promote the use of VOS. You can add the VOS logo which is available on the INPS website [here](#) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides/marketing-pack>).
- **Answer phone** - Remind patients about VOS in your practice answer phone message.
- **Patient check-in** - When patients check-in at your practice reception, mention the benefits of using VOS to them.
- **Practice Callboard** - If your practice uses a callboard to call patients into consultation, you can use this to advertise VOS.
- **Marketing Pack** - You can download the VOS Marketing Pack [here](#) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides/marketing-pack>). It contains the following to help you promote and introduce VOS to your patients:
  - **VOS Appointments Patient User Guide** - Shows patients how to register, log in and book appointments.

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 **Note** - There is also a comprehensive on-screen help system available from the VOS patient website.

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- **VOS Patient Registration form** - Use the new Vision Online Services Registration form. You can download and modify the Word document as required and give to patients or upload to your practice website to make it available to those who want to sign up for VOS.
- **VOS Appointments poster** - An A3 size poster advertising Vision Online Services. You can reduce the size if necessary and print off to advertise VOS in your practice waiting area.
- **VOS Repeats poster** - An A3 Online Repeats poster you can resize and print off for display in your practice waiting area.
- **Vision Online Logo** - The Vision online logo which you can add to your practice website or letterheads.

## Practice and Patient Resources

The following full **practice** user guides are available to download from the INPS website [here](http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>):

- **VOS Configuration User Guide**
- **VOS Registration User Guide**
- **VOS Online Appointments User Guide**
- **VOS Online Repeats User Guide**

The following **patient** downloads are available:

- **VOS Patient Registration Form** - The [registration form](http://www.inps4.co.uk/file/5881) (<http://www.inps4.co.uk/file/5881>) you need to give to your patients to fill in before registering them for VOS.
- **VOS Patient User Guide** - [Patient leaflet](http://www.inps4.co.uk/file/5860) (<http://www.inps4.co.uk/file/5860>) to help patients get started.

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 **Note** - When using VOS, patients can click on the **Help** link at the top of each page to get on-screen help for the VOS page they have open.

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## Patient Registration Overview and Considerations

Once Vision Online Services has been enabled and you have configured VOS in Vision Control Panel (see the Vision Online Services Configuration User Guide on the INPS website [here](http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/vision-online-services-user-guides>)), a new Online Services screen becomes available in **Registration**. This enables you to create a VOS web account for the patient, which will record the status of their account (this account can be disabled by the practice if misused by the patient).

### Considerations

It is important to make the following points clear to the patient:

- VOS can be accessed from PC, laptop, iPhone, Android and Blackberry
- They need to register within the expiry duration entered for registration letters and account activation (the default is 30 days but you can change this if necessary)
- They cannot share the same email address in multiple VOS accounts - this may cause confidentiality issues
- There is a maximum number of appointments they can have booked at any one time (defined by the practice)
- What they should do if they are locked out of the system after 5 failed login attempts (the system will unlock them automatically after 4 hours but you may advise them that they can contact the practice to be unlocked manually)
- Who to contact if they are experiencing problems with VOS



You can explain your practice protocol either verbally or by editing the printed registration letter.

See *Considerations before Going Live* (page 1) for a full list of preparation items to help with Configuration, Registration, Online Appointments and Online Repeats.

### **At the Practice - Registering a Patient to Use VOS**

The following explains the registration process at the practice and where to get more information.

1. Ask the patient to fill in the Vision Online Services Patient Registration form before you add their VOS Registration details to Vision. You can find this form on the INPS website [here](http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/visio-n-online-services-patient-registration-formdoc) (<http://www.inps4.co.uk/my-vision/user-guides-downloads/user-guides/visio-n-online-services-patient-registration-formdoc>) and modify if necessary (eg with your practice logo) before emailing to the patient or uploading to your practice website.
2. Validate the patient by confirming the patient's identity and recording the Read code **91B.00 Patient data verified** into the patient's journal in Consultation Manager. See Add Patient Verification Details in the VOS Registration Guide.

You can now create an online account for the patient:

3. In Vision Registration, select the patient and open the Online Services tab.
4. Add the patient's confirmation email address and click on **Create Online Account**.

The patient status in the Online Services tab is shown as 'Created'. The system generates a 10 character registration token and launches Microsoft Word with the registration letter containing the following online registration details:

- **Practice ID**
- **Patient ID**
- **VOS Registration token**

5. Print this letter and hand to the patient (if preferred you can save the document and email to the patient).

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 **Note** - You can choose to change the wording or add links to the letter before giving to the patient (you can use this to advertise VOS - see *Advertising VOS* (page 3) or add links to your practice website). Open in **Vision - Utilities - Word Processor - Vosreg letter** and make your changes as required.

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6. Make the patient aware that the Registration token may have an expiry date and they should register and activate their account as soon as possible.

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 **Note** - You can run a search for all VOS patients by Registration Status (ie Created, Registered, Active, Locked).

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See the VOS Registration (Practice) section of the VOS Registration Guide for more detailed information.

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 **Note** - If you want to set up more than one account (eg for other family members) it is important that you use a different email address for each account. If you use the same email address for multiple accounts, appointment booking and prescription ordering confirmation emails for all accounts will be sent to the same email address and may cause confidentiality issues.

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### **Patients - Registering and Activating their Online Account**

The following explains the registration process that should now be undertaken by the patient to create an online account.

1. Access the VOS website ([www.myvisiononline.co.uk](http://www.myvisiononline.co.uk)) and click on the Register tab.
2. Enter the Practice ID, Patient ID and Registration Code as contained in the registration letter generated at the practice.
3. Create a username and password and tick the box to confirm acceptance of the Terms & Conditions and Privacy Policy.
4. Click **Register** to create the online account. An activation email containing a confirmation code is sent to the patient's email address

The patient must now follow these steps to activate their account:

5. In the confirmation email, click on the link to open the Registration Confirmation screen.

#### **OR**

If still logged in to the VOS website, enter the Confirmation Code directly into the Confirmation Code box and click **Activate**.

The patient should now be able to log in and start using Vision Online Services.

For further information, see the **VOS Registration (Practice) - Creating an Online Account** section of the VOS Registration guide.

Now that you have VOS up and running both at the practice and for the patient, you now need to make sure that Online Appointments and Online Repeats are properly set up, so that patients can book appointments and request repeats when they need to. See [Considerations before Going Live](#) (page 1) for appointments and repeats items you should consider before going live - and [Resources Available](#) (page 4) topic for links to all available VOS user guides.