Vision Anywhere Windows ICE Test Requesting Guide

Version 1.0

24 July 2018

Vision
The Bread Factory
1a Broughton Street
London SW8 3QJ

Registered No: 1788577 England

www.visionhealth.co.uk
T +44(0) 20 7501 7000
F +44(0) 20 7501 7100

© 2018 In Practice Systems Limited

All Rights Reserved.

No part of this document may be photocopied, reproduced, stored in a retrieval system or transmitted in any form or by any means, whether electronic, mechanical, or otherwise, without the prior written permission of In Practice Systems Limited.

No warranty of accuracy is given concerning the contents of the information contained in this publication. To the extent permitted by law, no liability (including liability to any person by reason of negligence) will be accepted by In Practice Systems Limited, its subsidiaries or employees for any direct or indirect loss or damage caused by omissions from or inaccuracies in this document.

In Practice Systems Limited reserves the right to change without notice the contents of this publication and the software to which it relates.

Product and company names herein may be the trademarks of their respective owners.

In Practice Systems Limited

The Bread Factory

1a Broughton Street

London

SW8 3QJ

Website: www.visionhealth.co.uk

Table of Contents

Test Requesting - ICE 6
Introduction 6
Workflow Overview 7
Request Workflow 7
Configuration 8
Switching On 8
Adding Providers 8
Add Test Request 10
Additional Information 11
Example of ICE Test Requesting Interface 12
Managing Test Requests 13
Edit Test Requests 13
Delete Test Request 13
Reports 14
Managing Provider Details 15
Edit Provider 15
Inactivate a Provider 15
Managing ICE Passwords 17
Reset Passwords 17
Add Practice 18

Test Requesting - ICE

Introduction

Electronic test requesting provides an integrated link directly from the patient record in Vision Anywhere to the laboratory system via a secure NHSNet connection. Vision Anywhere is integrated with the Sunquest (ICE).

Benefits of integrated electronic test requesting:

- There is no longer a need to re-key/write out demographic data for each test request.
- There is a reduction in errors and mismatches when the result comes back.
- It reduces the need to chase results from the laboratory.
- There is an improvement in data quality as the patient record is more up-to-date.
- Reduction / cessation of ordering duplicate test requests.

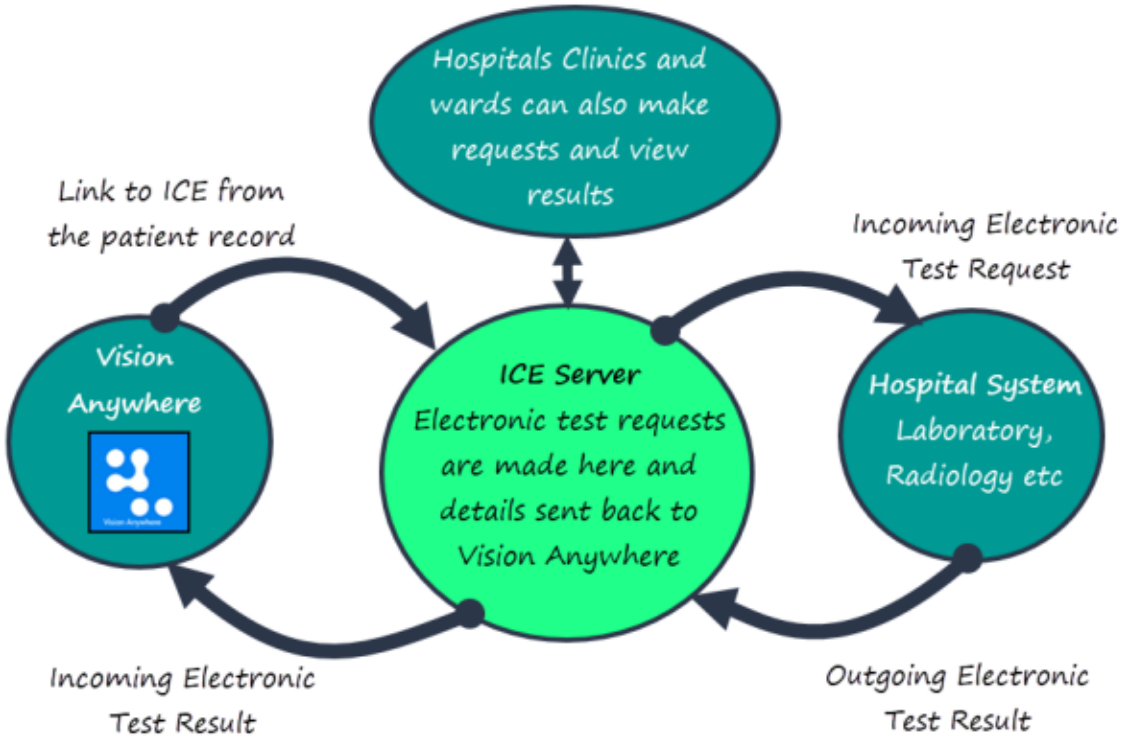
Please note that Vision Anywhere supports the following services for ICE:

- **Order Test** –Make a request.
- **Update Test** – Edit a request. This is currently only possible during the current open encounter, once the encounter is closed the update has to be carried out in Vision 3 Consultation Manager.

Note - Your Hospital Trust is responsible for delivering your Sunquest test requesting integration. Please liaise with them to arrange installation or with any queries regarding your Requesting System.
On instruction from Sunquest, Vision remotely enables the software at each practice.

Workflow Overview

The workflow process for test requesting with Vision Anywhere is as follows:



Workflow between Vision Anywhere, Test Requesting System and Hospital System

Request Workflow

1. From Vision Anywhere open an Encounter.
2. Enter **Test** in the dynamic data entry bar.
   Entries display as you type.
3. Select **Test Request** from the results.
4. Select the provider from the drop down list.
5. Make test request and print the details. Affix specimen to the printed request.
   OR make the test request, but leave the sample collection details to be entered at a later date.
6. The details write back to the request form in Vision Anywhere and save to the patient's record.

See - Add Test Request.

Configuration

Note -

- The configuration of Test Requesting is currently carried out in Vision 3.
- If you are already using electronic test requesting in Consultation Manager, the settings and configuration automatically apply to Vision Anywhere and no new configuration is needed.

Switching On

Your Hospital Trust is responsible for delivering your Sunquest test requesting integration. Please liaise with them to arrange installation or with any queries regarding your Requesting System.

On instruction from ICE, Vision remotely enables the software at each practice in a timely and controlled manner. Once this has been done, you need to:

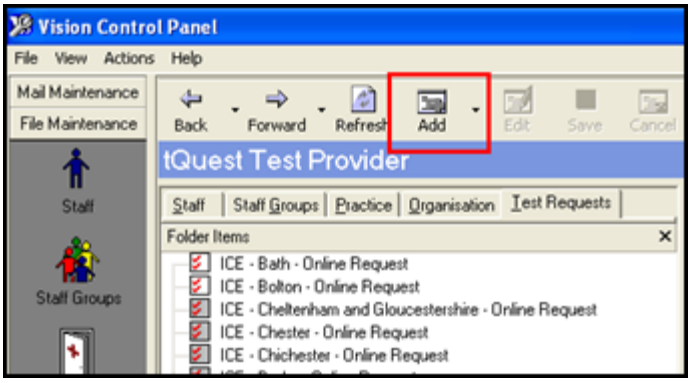
- Add required provider(s) in Control Panel – Test Request.
  See - Adding Providers on page 8.
- Make sure you have staff accounts details (provided by your trust).
- It is also advisable to liaise with your trust and provide them with a list of Clinicians and non-Clinicians who want to use the service before go live.

Adding Providers

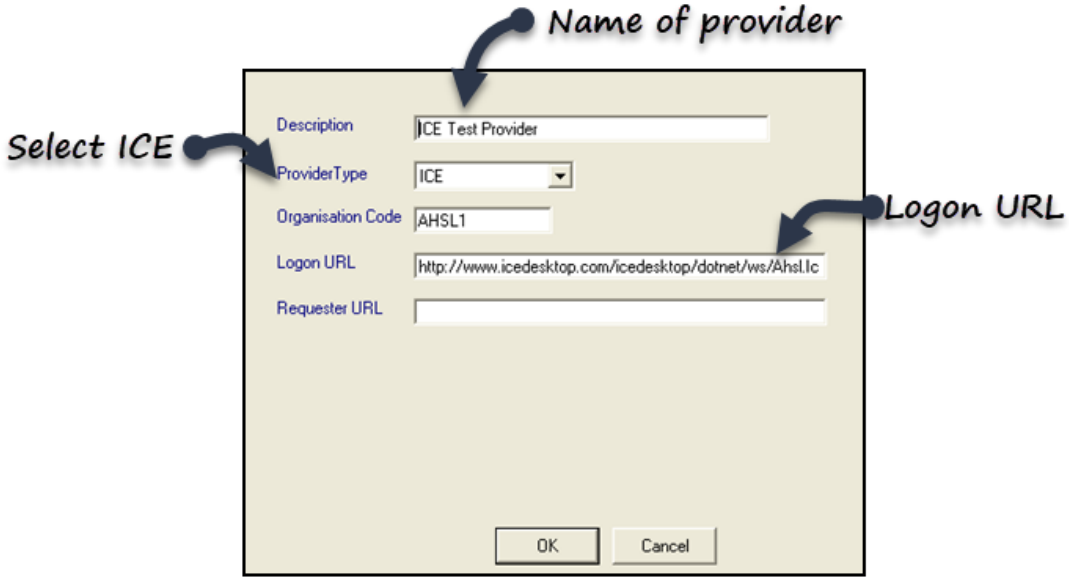
Firstly, in Vision 3 you need to add the provider(s) which you intend to use for electronic test requesting.

You need the provider URL, Provider Type and Organisation Code which you can obtain from your trust.

1. From the Vision 3 main menu, go **to Management Tools** - **Control Panel**.
2. Select **File Maintenance** and click on the **Test Requests** button.
3. Click on **Add**.



4. Complete the **Provider Add** form.



- **Description** - Name of Provider - usually the Hospital Lab name
- **Provider Type** - Select ICE
- **Organisation Code** - Obtained from your Trust
- **Logon URL** - Details provided by your Trust
- **Requester URL** - Leave blank

5. Click **OK** to save the changes.
   The provider details are added to the list in the **Test Request Pane**.

Note - You can also set up a practice login etails from Control Panel.

See - Add Practice on page 18.

Add Test Request

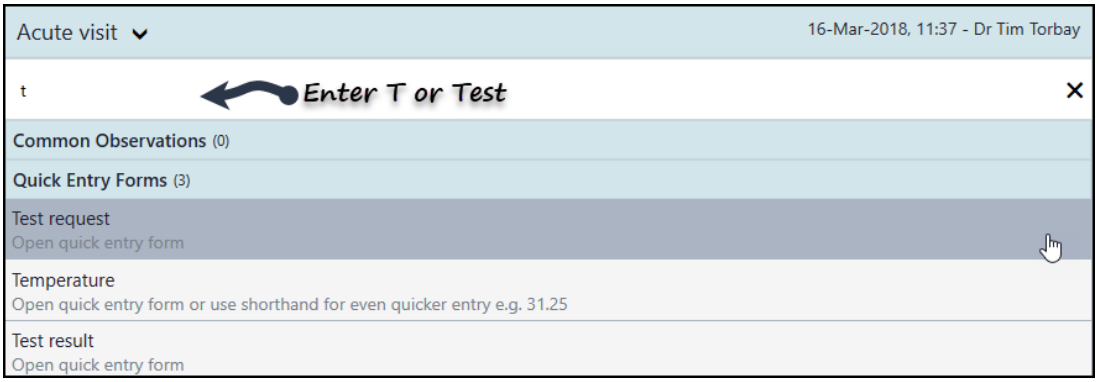
This is configured in Vision 3, and needs to have the providers and user account details set up to enable this for Vision Anywhere.

Electronic test requests are generated in your Encounter from the **Electronic Requests** form, you can either:

- Record the full request and sample collection details, (you would also follow this method if samples are collected by an external hospital phlebotomist, for example).
- Record the request only, for example the GP can add a request and the practice nurse can collect the sample and update the request

Note - Before adding a Test Request in Vision Anywhere you must have previously recorded a request in Vision 3, so your user credentials are stored.

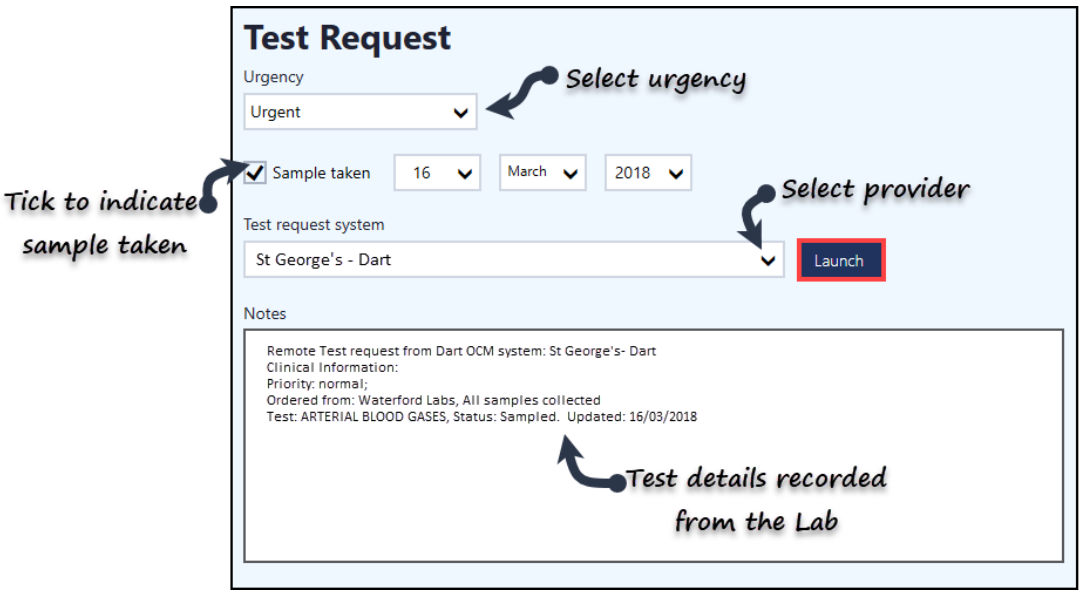
1. Select a patient.
   See - Search for a Patient.
2. Open an Encounter.
   See - Adding an Encounter.
3. In the dynamic data entry bar enter T or Test.



The following terms also trigger the form:

Tes, Te, Test Request, Test Req, Investigation, CXR, Blood, MRI, MSU, Stool, IX, USS, CT, Swab, XRY, X-ray

4. Select **Test Request**.
   The Test Request form displays.
5. Select the **Urgency** from the drop down list.
   The options are - *Routine / Stat / Urgent*.



6. If the sample has been taken, tick the box.
   Today's date populates, this can be changed if required.
7. Choose the provider from the **Test request system** drop down.

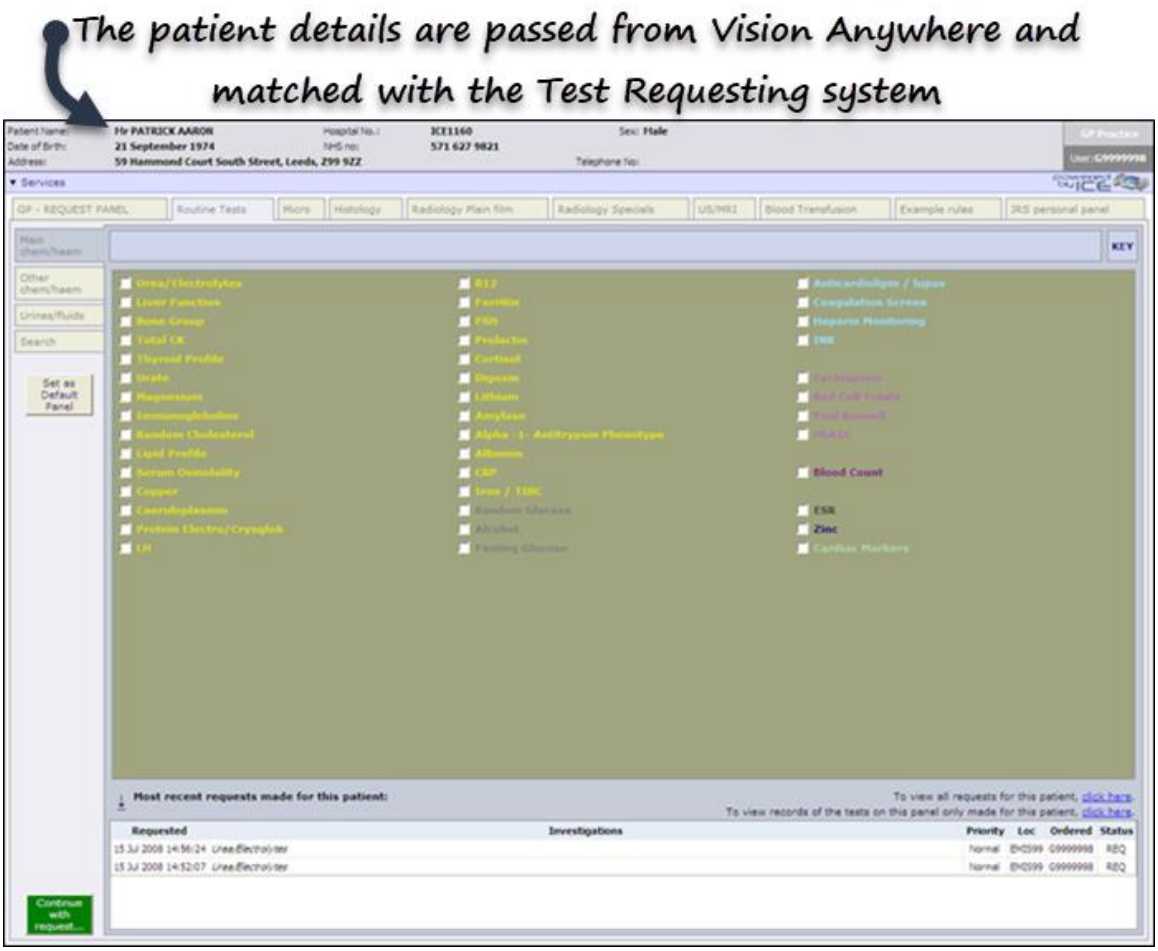
   Note - These are populated from the settings in your Vision 3 system.
8. Select the **Launch** button.
   The Test Requesting system displays using the account credentials stored in Vision 3.
9. Fill in the Test Request form as normal and print the relevant form / label.
10. Select **Process** or **Save & process** to complete the test request.
11. The details of the test request record in the **Notes** field.
    The notes field can be added to, however if the notes from the test request provider are deleted this will prevent the request system being launched again.
12. Select the **Save** button.
    The patient's record updates with one the following depending on if the sample was taken:
    SNOMED ConceptID: 202121000000100 / Read code: 8BR "**Investigation Indicated**"
    SNOMED ConceptID: 165333005 / Read code: 414..00 "**Sample sent to laboratory for test**"

Additional Information

- Once an encounter is closed the Test Requesting provider cannot be relaunched.
  If changes need to be made this will have to be done in Vision 3.
- If a Test Request is entered, and the sample is taken at a later date, then this will need to be added in Vision 3.
- If Test requesting is not enabled at your practice the Providers and Launch options do not display.
- This will be enabled for Shared Care Organisations in a future release.

Example of ICE Test Requesting Interface

Note - ICE website pages can be customised (for example, by the Hospital Trust) and you are referred to their respective local training and user guides for details on how to use the test requesting web pages.



See - Managing Test Requests on page 13.

Managing Test Requests

Edit Test Requests

Test requests can only be edited in Vision Anywhere if the **Encounter** is still open.

1. From the current encounter, select the **Test Request**.
   The request screen displays.

2. Select the **Launch** button.
3. Update the test as required.
4. Select **Process** or **Save & process** to exit the Test Requesting system.
   The encounter updates.
5. Save the Encounter.

Note - If the encounter is closed, then the Test Request has to be updated in Vision 3.

Delete Test Request

Once you have made a request, you can delete individual or all tests within a request, as long as the Encounter is still open.

This must be done from the ICE interface via the request form. The request in Vision Anywhere updates to reflect any deletions made in ICE.

Note – If you delete a request in Vision Anywhere this does not in turn delete the request from the ICE interface.

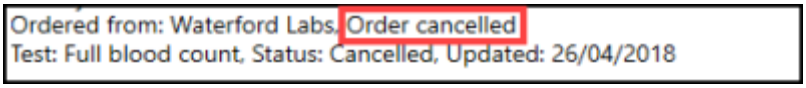
If part of a request is deleted, the encounter entry automatically updates to show a status of Cancelled.

If one test is cancelled in a multi-test request, the encounter entry automatically updates to mark that specific test as cancelled.

Test requests can only be deleted in Vision Anywhere if the **Encounter** is still open.

1. From the current encounter, select the **Test Request**.
   The request screen displays.

2. Select the **Launch** button.
3. Cancel the test(s) as required.
4. Enter Cancellation reason.
   The encounter updates.



5. Save the Encounter.

Note - If the encounter is closed, then the Test Request has to be deleted via Vision 3.

Reports

The following reports can be accessed via the Test Requesting Interface in Vision 3.

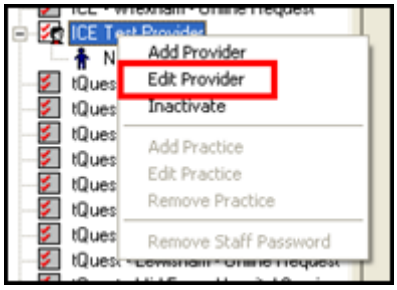
- View Incomplete Tests
- Uncollected Samples
- Location Report

Managing Provider Details

Edit Provider

If you need to change the details of a provider, for example, if the provider changes their URL/logon ID, this needs to be updated in Vision 3:

1. From the Vision 3 main menu, go to **Management Tools** - **Control Panel**.
2. Select **File Maintenance**.
3. Click the **Test Requests** button.
4. Right click on the provider you would like to change.
   A menu displays.
5. Select **Edit Provider**.



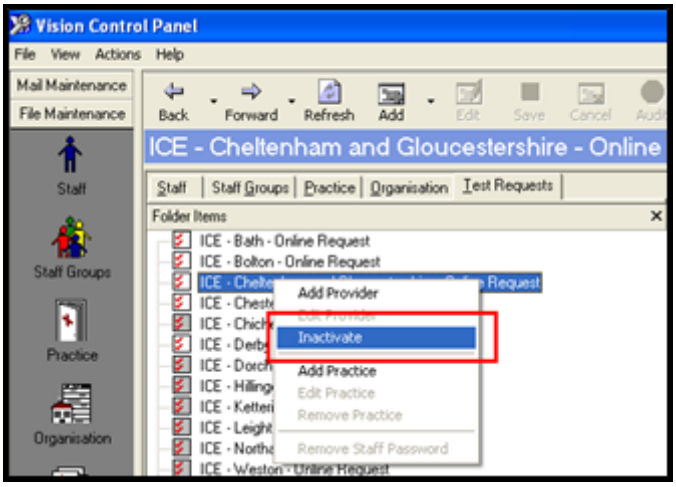
   The form displays.

6. On the **Provider Form**, make the necessary changes.
7. Click **OK** to save.

Inactivate a Provider

If you need to inactivate a provider, this needs to be carried out in Vision 3:

1. From the Vision 3 main menu, go to **Management Tools** - **Control Panel**.
2. Select **File Maintenance**.
3. Click the **Test Requests** button.
4. Right click on the provider you would like to inactivate.
   A menu displays.
5. Select **Inactivate**.



The list refreshes.

6. The inactive provider remains in the list and the icon displays in grey.

See - Configuration on page 8.

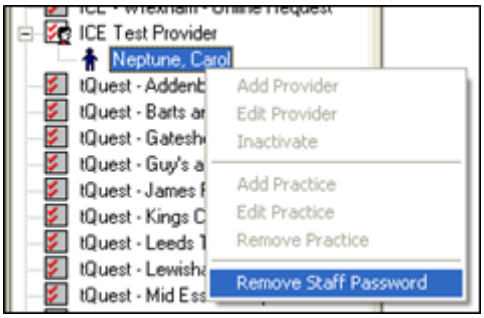
Managing ICE Passwords

Passwords are currently managed in Vision 3.

Reset Passwords

You can reset an ICE password from **Control Panel** – **Test Requests**. You might need to do this if, for example, a user saves their password details on the **Select System** and **Account** screen in Vision 3 Consultation Manager, but has saved the wrong password.

1. Go to **Management Tools** - **Control Panel**.
2. Select the **Test Requesting** button.
3. Click on the plus next to the provider to view a list of the staff accounts for this provider.
4. Right click on the relevant user.
   A menu displays.
5. Select **Remove Staff Password**.



6. The user can enter a new password when they next login to ICE from Vision 3 - Consultation Manager.

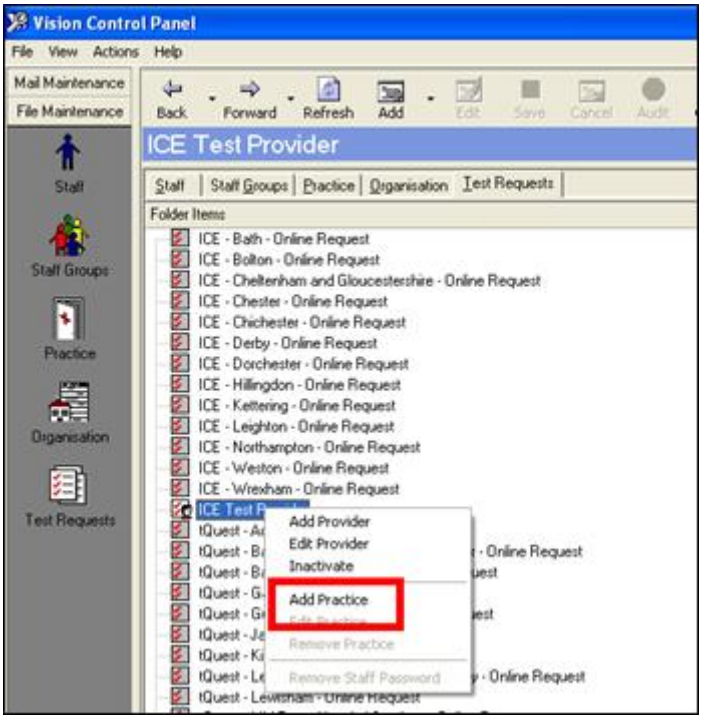
Add Practice

You can either add a practice login details in **Control Panel** for a **Test Request** provider, or you can create a user login when making a test request in Consultation Manager. This is normally determined by the provider.

Adding a practice login lets any practice member make a test request. The audit trail is traced through the Vision 3 or Vision Anywhere login details.

The right menu option of **Add practice** is available only if there are no user records for this provider (either practice or staff). It allows the user to enter the username and password in order to create a user record.

1. Go to **Management Tools** - **Control Panel**.
2. Select the **Test Requesting** button.
3. Right click on the **Test Request Provider**.
   A menu displays.
4. Select **Add practice**.



   The add form displays.

5. Enter the **User Name** and **Password**.
   This Information is provided by the Trust.

6. Confirm the password.
7. Click **OK** to save.

See - Configuration on page 8.