



BMJ Version 4 User Guide

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Introduction

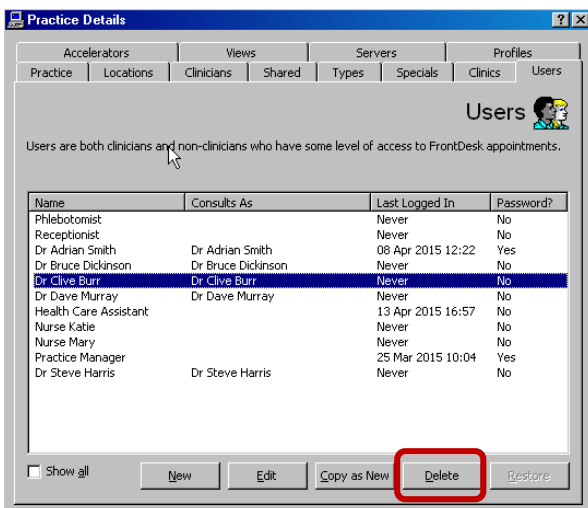
In order to comply with GPSoC requirements, local authentication standards have been introduced in this version.

A message has been added to the main Login screen in order to comply with required standards of authentication.

Access to this computer/system and any information it contains is limited to authorised users only. Legal action may be taken against unauthorised use of, or unauthorised access to, this computer/system and/or any information it contains, including pursuant to the Computer Misuse Act 1990. If you are an authorised user, by proceeding to access and use this computer/system and/or the information it contains, you are accepting any terms of use, notices and policies which are contained or referenced within it or which have otherwise been drawn to your attention as an authorised user.

- We recommended that **all** users set a password into the system (minimum standards apply)
Passwords must:
 1. *be a minimum 8 characters in length*
 2. *contain at least one uppercase and one lowercase character*
 3. *contain at least one numeric character*
 4. *not contain all of the user's first name or surname as entered in their User Name field*
- To enable changes to or resetting of passwords, **all** users will be required to enter email address details onto the system.
- Note: Windows authentication is **no longer** supported.

In preparation for the changes in V4, we suggest that the list of current users is modified prior to the V4 upgrade by 'Deleting' all users who no longer require a login for BMJ, (Practice Details | Users | Highlight/select the User and click Delete).



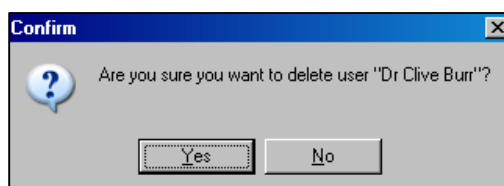
Practice Details | Users

Remove all users who no longer require a Login for BMJ.

Select/highlight the user required

Click **Delete**

Click **Yes** to confirm



Login

BMJ

User: Receptionist [Login] [Cancel]

Password: [Request Password Reset]

Use ribbon interface

Access to this computer/system and any information it contains is limited to authorised users only. Legal action may be taken against unauthorised use of, or unauthorised access to, this computer/system and/or any information it contains, including pursuant to the Computer Misuse Act 1990. If you are an authorised user, by proceeding to access and use this computer/system and/or the information it contains, you are accepting any terms of use, notices and policies which are contained or referenced within it or which have otherwise been drawn to your attention as an authorised user.

V4.0.0 / Copyright Informatica Systems Ltd., 2001-2015

Login

A message has been added to the main Login screen in order to comply with required standards of authentication

Login - Information

In order to comply with GPSoC requirements, local authentication standards have been introduced.

We recommend that **all** users set a password (minimum standards apply) and to enter an email address into the system to enable changes or resetting of passwords.

System Settings – Security

System Settings

Settings Security Colour Schemes Active List Message Templates Scheduled Messages Labels Full Backup

Security Settings

It is recommended that all security options are selected in order to have optimal security for your system.

Security Management

Force users without a password defined to set one after login

Prevent user login if no password defined

Force users to reset passwords every 90 days

Disable users if they have not accessed the system in 90 days

Disable users after 3 unsuccessful login attempts

User inactivity timeout: 30 minutes, User inactivity warning time: 60 seconds

[OK] [Cancel]

System Settings – Security

NOTE: Windows authentication is **no longer** supported.

There is a new tab in **System Settings | Security** where certain requirements may be set:

RECOMMENDED: Force users without a password defined to set one after login. This option is **not** ticked by default for existing users (ticked by default for new 'greenfield' sites)

Prevent user login if no password defined. This option will remain unavailable to select until **all** users have a password defined

Force users to reset passwords every XX days (default 90 days)

Disable users if they have not accessed the system in XX days (default 90 days)

Disable users after X unsuccessful login attempts (default 3 attempts)

User inactivity timeout: XX minutes (default 60 minutes). User inactivity warning time: XX seconds (default 30 seconds)

Scenario 1) User login with an existing password but no Email address

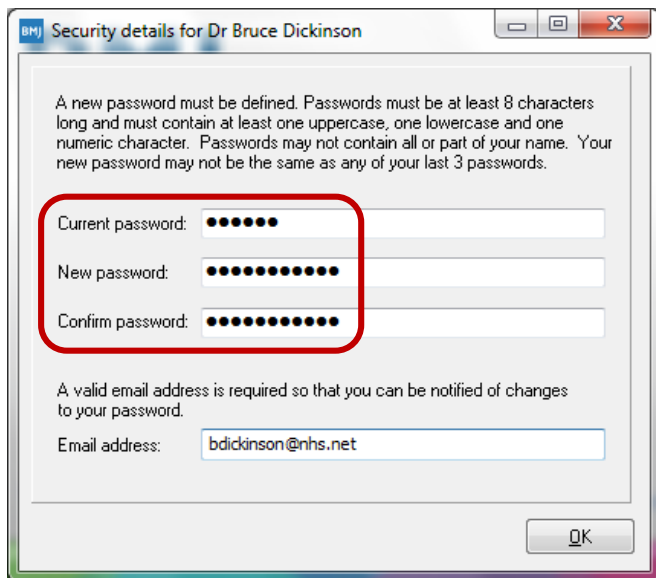


The image shows the BMJ login interface. At the top left is the BMJ logo. Below it, there is a 'User:' field with a dropdown menu showing 'Dr Adrian Smith', a 'Login' button, and a 'Cancel' button. Below that is a 'Password:' field with a masked password (dots), a 'Request Password Reset' button, and a checkbox labeled 'Use ribbon interface' which is checked. At the bottom, there is a disclaimer about system access and a version number 'V4.0.6' and copyright information 'Copyright Informatica Systems Ltd., 2001-2015'.

Login

Following the upgrade to this version users may log in with their existing password, **but they will be asked to set a new password if their existing password does not meet the rules listed below.** The users will also need to enter an Email address at the time of log in.

Select your name from the **User:** drop down list, enter your existing **Password:** & select **Login**



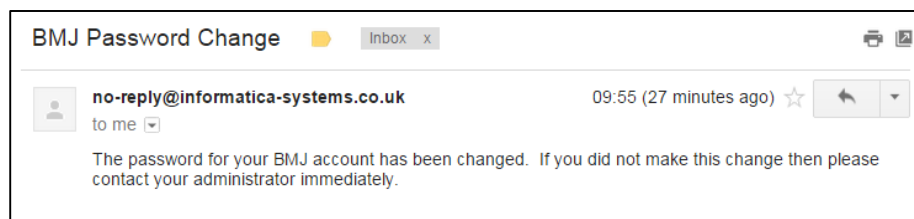
The image shows a window titled 'Security details for Dr Bruce Dickinson'. It contains instructions: 'A new password must be defined. Passwords must be at least 8 characters long and must contain at least one uppercase, one lowercase and one numeric character. Passwords may not contain all or part of your name. Your new password may not be the same as any of your last 3 passwords.' Below this are three password fields: 'Current password:', 'New password:', and 'Confirm password:'. The 'New password' field is highlighted with a red box. Below the password fields is a note: 'A valid email address is required so that you can be notified of changes to your password.' and an 'Email address:' field with the value 'bdickinson@nhs.net'. An 'OK' button is at the bottom right.

Password & Email address

The following window will appear. **The user is unable to close this window, or continue, until a new password and Email address is entered.**

Passwords must:

1. be a minimum 8 characters in length
2. contain at least one uppercase and one lowercase character
3. contain at least one numeric character
4. not contain all of the user's first name or surname as entered in their User Name field



The image shows an email titled 'BMJ Password Change' from 'no-reply@informatica-systems.co.uk'. The email content reads: 'The password for your BMJ account has been changed. If you did not make this change then please contact your administrator immediately.'

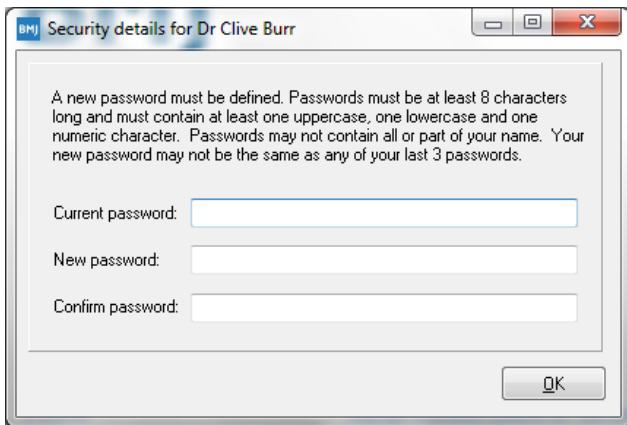
BMJ Password Change

An email is automatically sent to the user to confirm the password change

Scenario 2) User login with an existing password and Email address

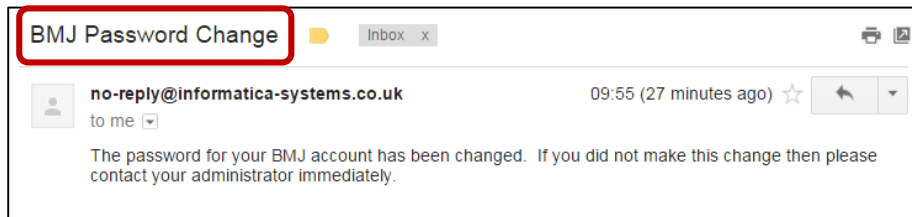
Login

Following the upgrade to this version users may log in with their existing password, **but they will be asked to set a new password if their existing password does not meet the rules listed below.** The users will also need to enter an Email address at the time of log in.



Password

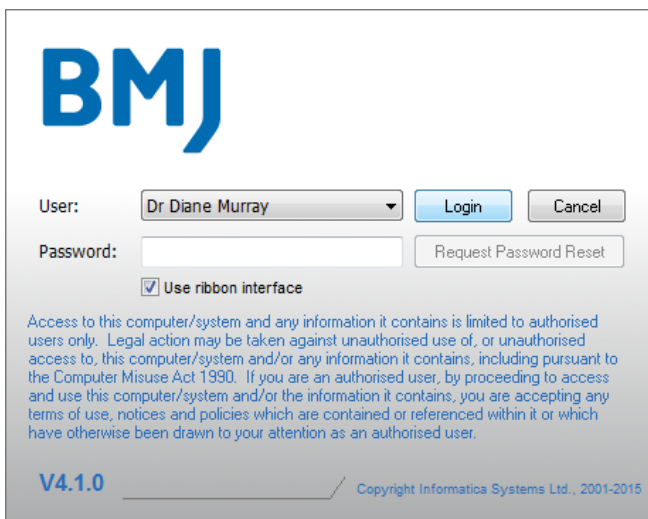
The following window will appear. The user is unable to close this window, or continue, until a new password is entered.



BMJ Password Change

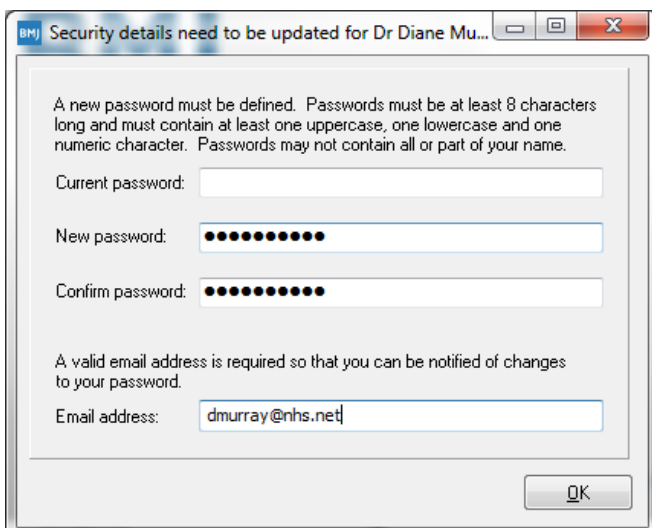
An email is automatically sent to the user to confirm the password change

Scenario 3) User login with 'Force users without a password defined to set one after login' selected (e.g. new 'Greenfield' sites)



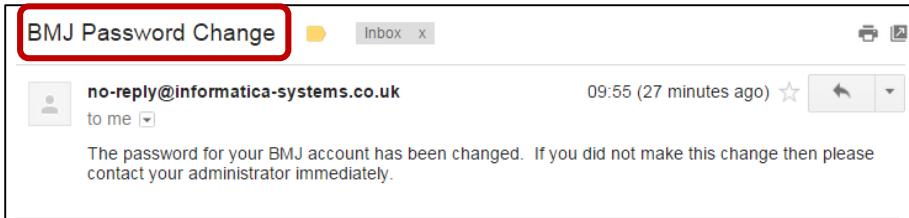
Login

Select your name from the User: drop down list & select Login



Password & Email address

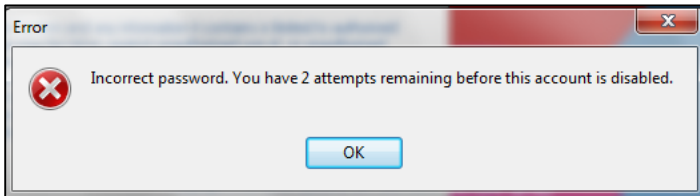
The following window will appear. The user is unable to close this window, or continue, until a password and Email address is entered.



BMJ Password Change

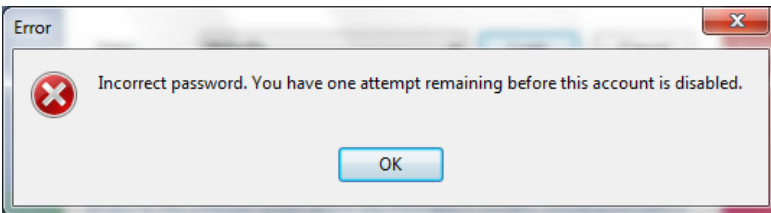
An email is automatically sent to the user to confirm the password change

Incorrect Password Attempts



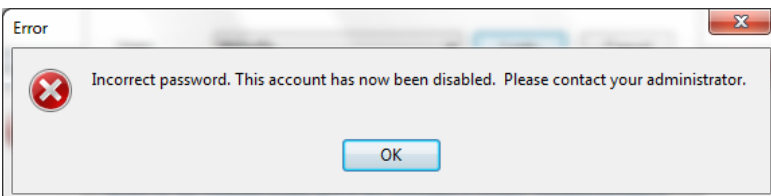
Error - Incorrect Password

*When a user logs into BMJ, if an incorrect password is entered an Error message will appear, '**Incorrect password. You have 2 attempts remaining before this account is disabled.**'*



Error - Incorrect Password

*If an incorrect password is entered again an Error message will appear, '**Incorrect password. You have one attempt remaining before this account is disabled.**'*

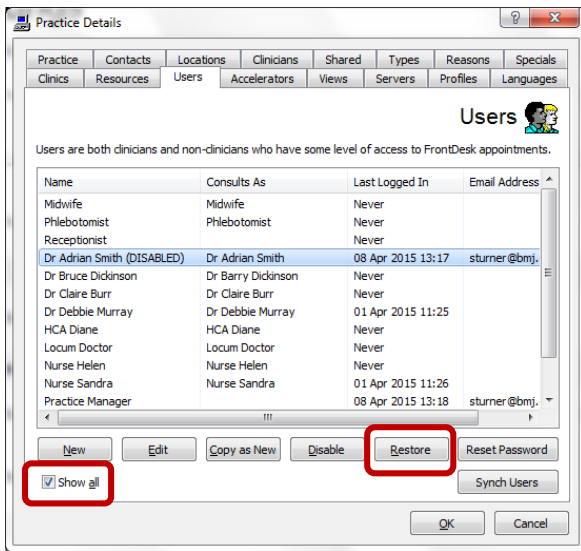


Error - Incorrect Password

*If an incorrect password is entered an Error message will appear, '**Incorrect password. This account has now been disabled. Please contact your administrator.**'*

Please note: An '**administrator**' is a user who has security access for [Practice Details & System Options](#) (see page 14 – Administrator Security)

User Disabled



User Disabled

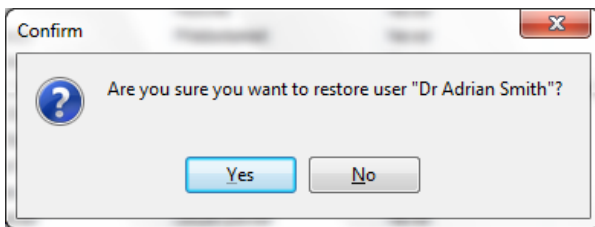
The User is **DISABLED**. An administrator can **'Restore'** the user from within **Practice Details | Users**

The **DISABLED** user will not appear until the **'Show all'** tick is applied.

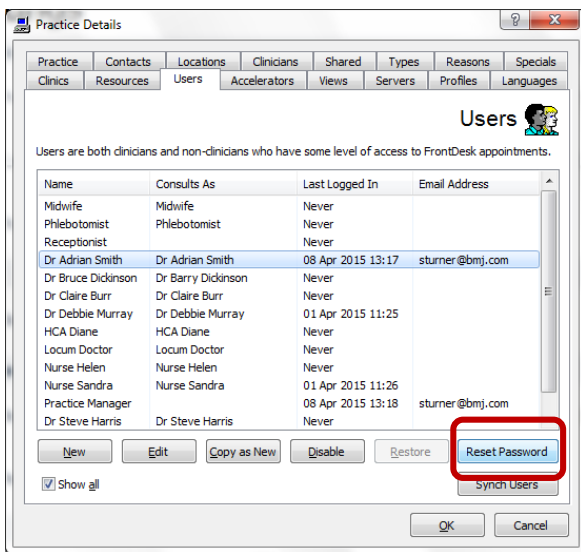
Highlight the **DISABLED** user and select **'Restore'**.

The following **'Confirm'** window will appear, click **Yes**

NOTE: See Page 4 **System Settings – Security** to change the defaults for Disabled users.



Reset Password

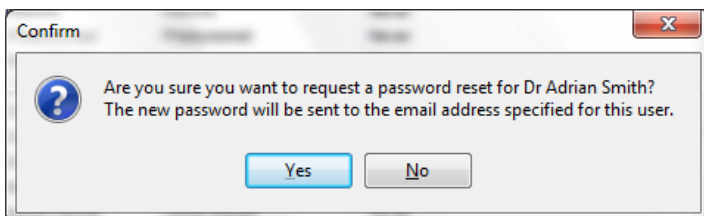


Reset Password

Go to **Practice Details** and select the **Users** tab

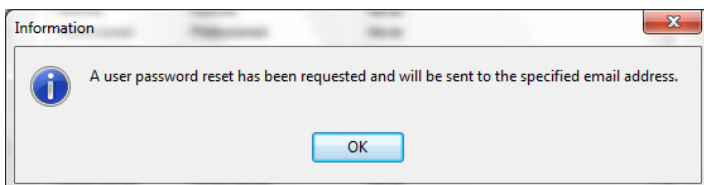
Select the **'Show all'** option

Highlight the user and select **Reset Password**

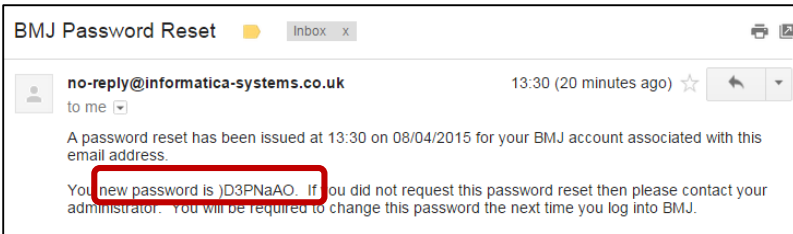


BMJ Password Reset

The **'Confirm'** window will appear, click **Yes**, followed by the **Information** window.

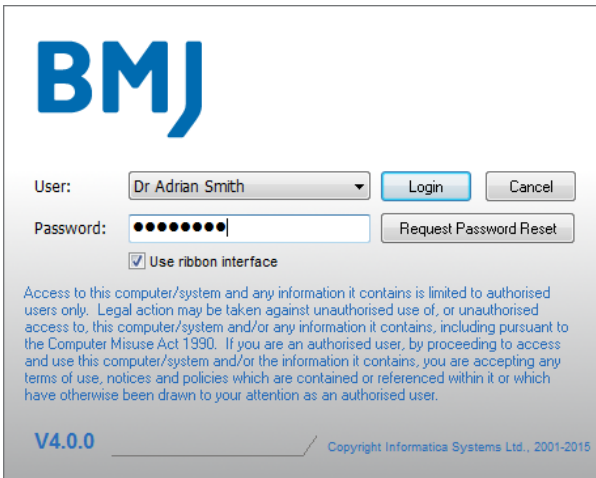


The user will receive an email containing a new password e.g. **)D3PNaAO**



BMJ Password Reset

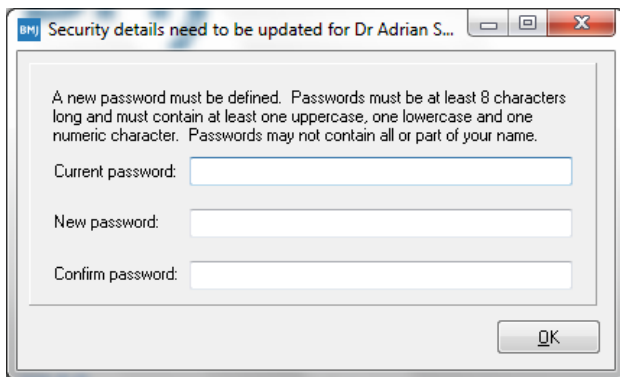
An email is automatically sent to the user to confirm the Password change



BMJ Password Reset

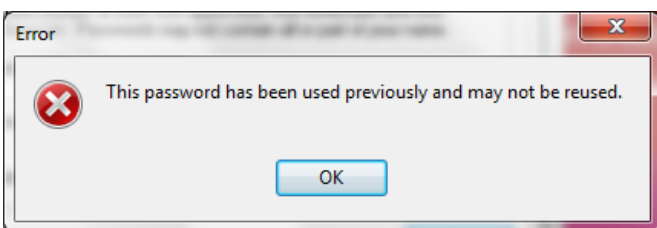
*Enter the **Current password** sent in the email e.g. JD3PNaAO*

*The user will need to enter a **New password** and **Confirm password**.*



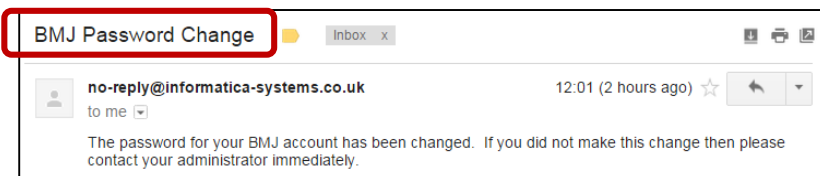
BMJ Password Reset

This new password is entered when the user logs in. They will be prompted to update their Security Details with a 'New' password.



Error

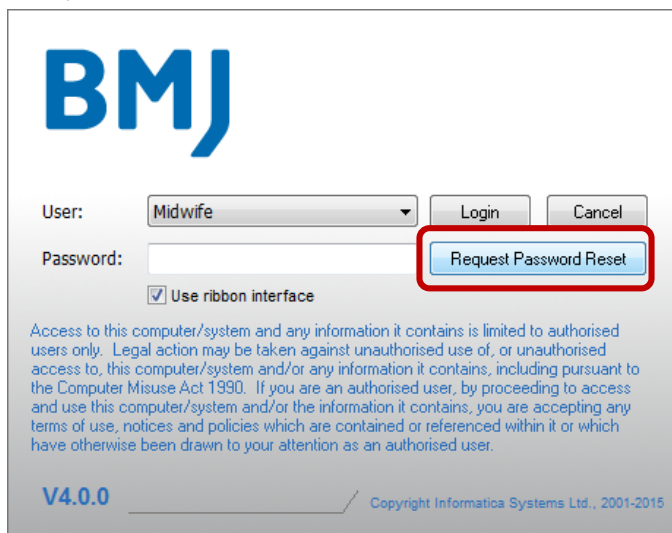
This message will appear if the user attempts to use a password that has previously been used.



BMJ Password Change

An email is automatically sent to the user to confirm the Password change

Request Password Reset from the BMJ Login window



The image shows the BMJ login window. At the top left is the BMJ logo. Below it, there is a 'User:' dropdown menu with 'Midwife' selected, and a 'Password:' text box. To the right of the password box are 'Login' and 'Cancel' buttons. A red box highlights a 'Request Password Reset' button located below the 'Login' button. Below the login fields is a checkbox labeled 'Use ribbon interface' which is checked. At the bottom left, it says 'V4.0.0' and at the bottom right, 'Copyright Informatica Systems Ltd., 2001-2015'. A disclaimer paragraph is visible between the password field and the bottom text.

Request Password Reset

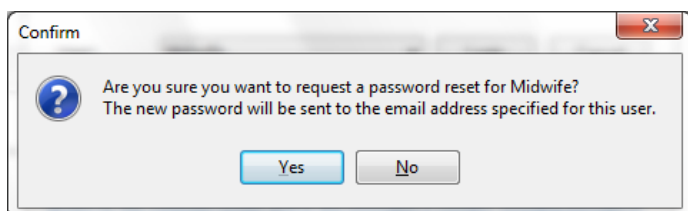
Users may change their own passwords.

From the BMJ Login window, select Request Password Reset

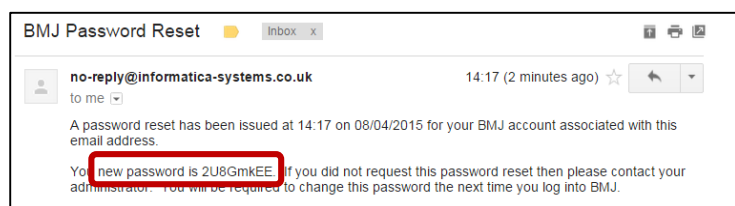
Adding/Editing a User

The **Confirm** window appears, select Yes.

The **Information** window appears, select OK.



The image shows a 'Confirm' dialog box with a question mark icon. The text inside asks: 'Are you sure you want to request a password reset for Midwife? The new password will be sent to the email address specified for this user.' There are 'Yes' and 'No' buttons at the bottom.

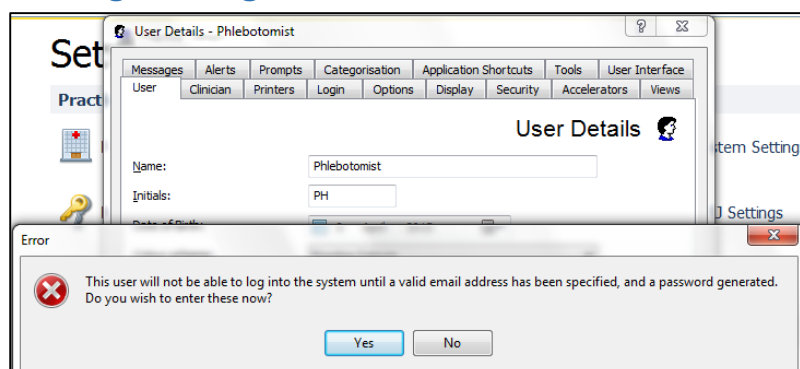


The image shows an email window titled 'BMJ Password Reset'. The sender is 'no-reply@informatica-systems.co.uk' and the time is '14:17 (2 minutes ago)'. The body of the email says: 'A password reset has been issued at 14:17 on 08/04/2015 for your BMJ account associated with this email address. Your new password is 2U8GmkEE. If you did not request this password reset then please contact your administrator. You will be required to change this password the next time you log into BMJ.' The new password '2U8GmkEE' is highlighted with a red box.

Adding/Editing a User

The user is sent an email containing a password. They will need this password the first time they login.

Adding/Editing a User

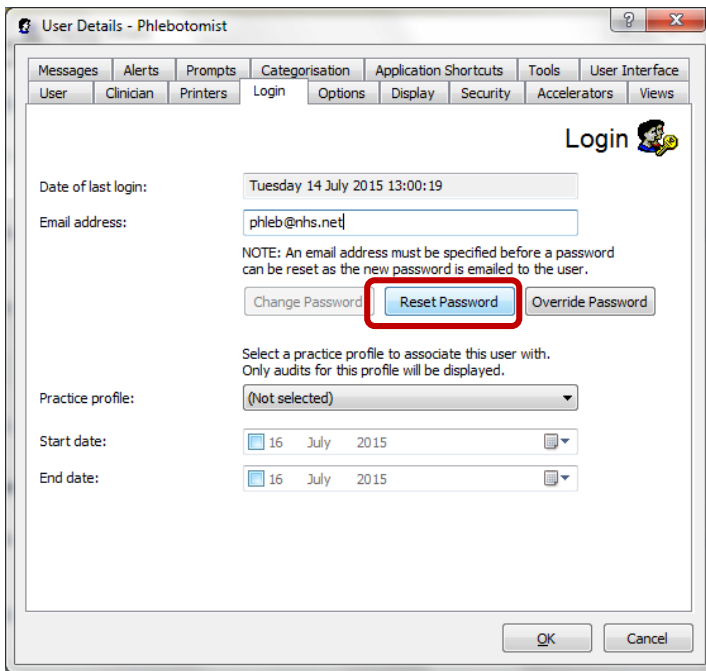


The image shows two overlapping dialog boxes. The top one is 'User Details - Phlebotomist' with tabs for Messages, Alerts, Prompts, etc. The 'User' tab is active, showing fields for Name (Phlebotomist) and Initials (PH). The bottom dialog box is an 'Error' message with a red X icon, stating: 'This user will not be able to log into the system until a valid email address has been specified, and a password generated. Do you wish to enter these now?' with 'Yes' and 'No' buttons.

Adding/Editing a User

After Adding or Editing a User the following Error window will appear.

The administrator is prompted to specify an email address and generate a password.



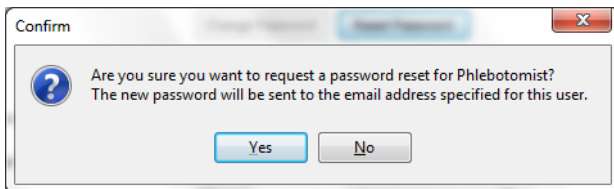
Adding/Editing a User

If Yes is selected, the administrator can click on the Login tab.

Enter an Email address and select **Reset Password**

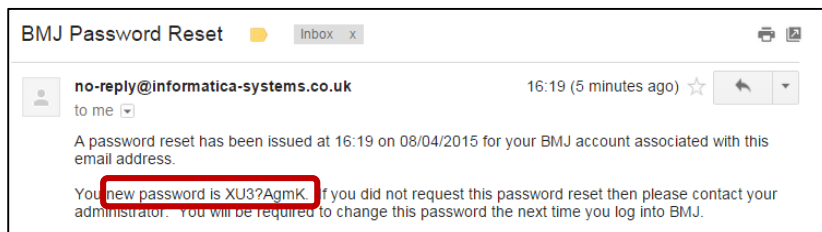
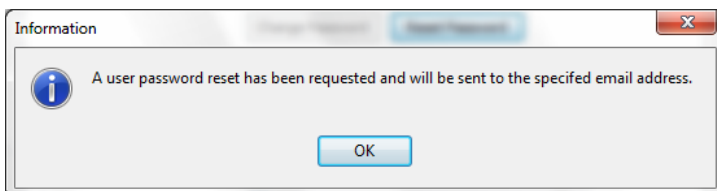
Request Password Reset

The 'Confirm' window will appear prompting the user 'Are you sure you want to request a password reset?'

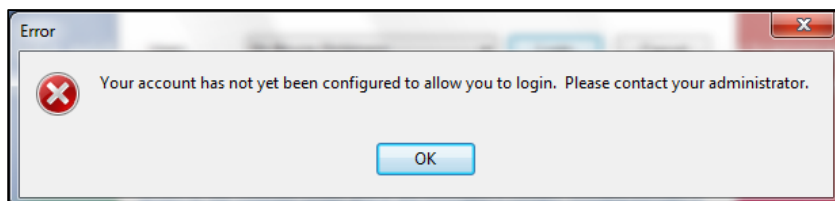


Request Password Reset

If they select 'Yes' an email will be sent to the email address specified for this user containing the new password.



New User – or User not Logged into BMJ prior to the V4 upgrade

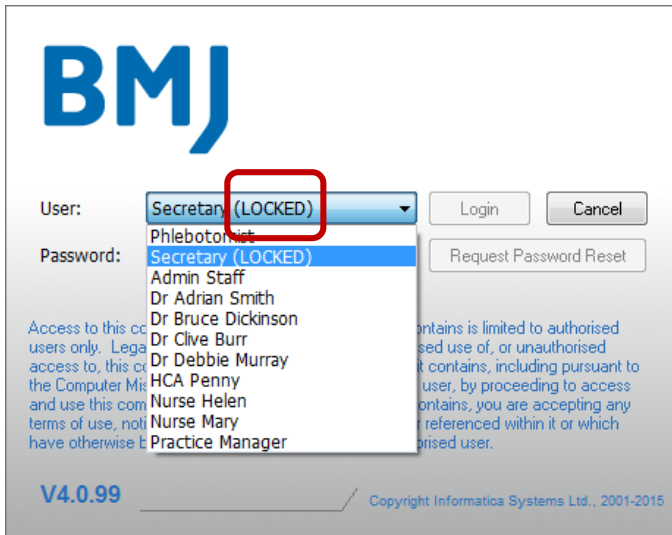


Account not yet configured

If a user has not yet logged into BMJ prior to the V4 upgrade this Error message will appear when they try to login.

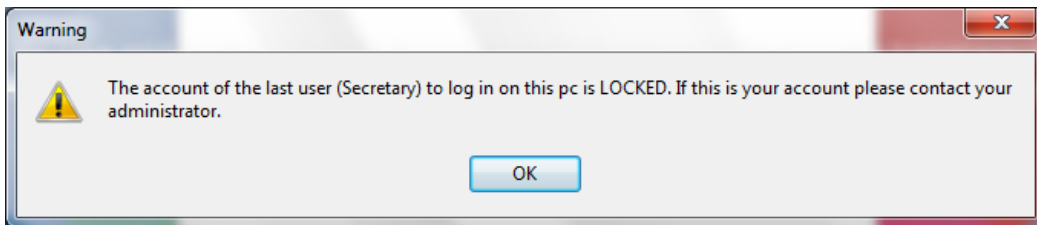
The administrator will need to edit the user details (see above Adding/Editing a User).

LOCKED User



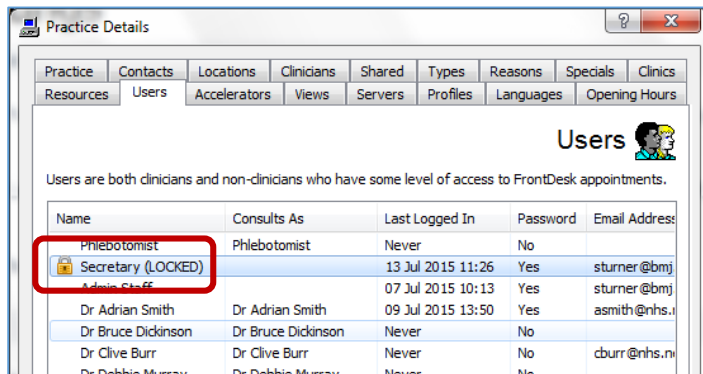
LOCKED User

We have introduced the concept of a 'LOCKED' user. Locked users will still be 'disabled', but will also be displayed as 'LOCKED'. In this example the User entered their password incorrectly 3 times, therefore the account became (LOCKED).



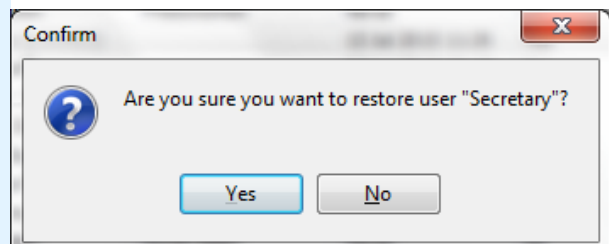
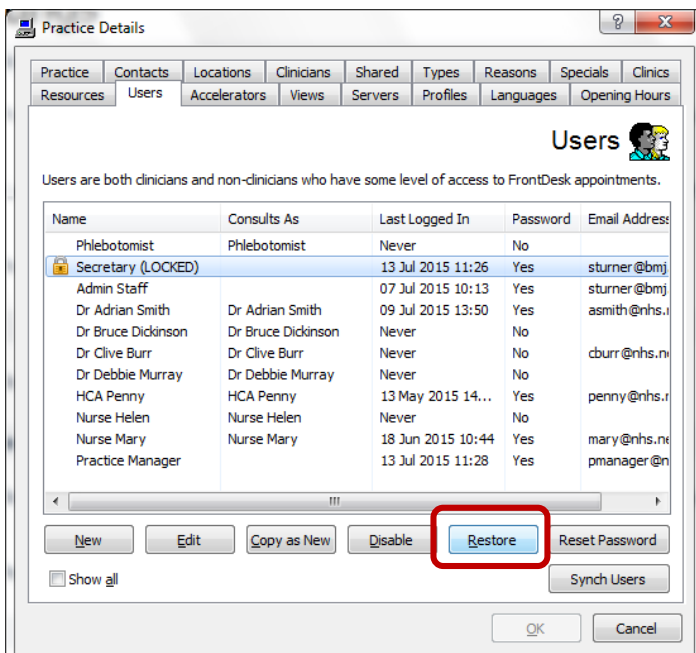
LOCKED User

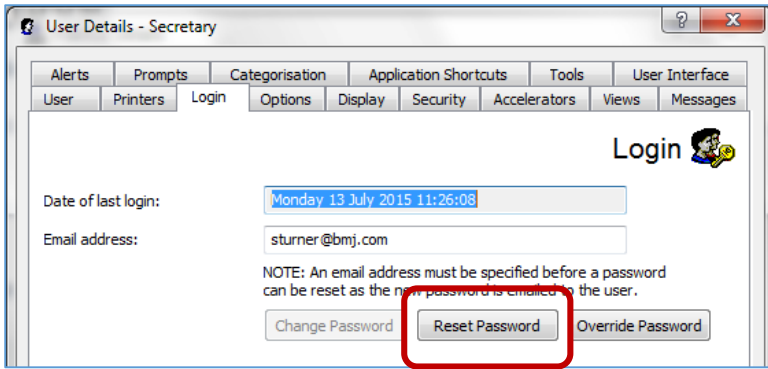
The following warning appears when the User attempts to log into BMJ



LOCKED User

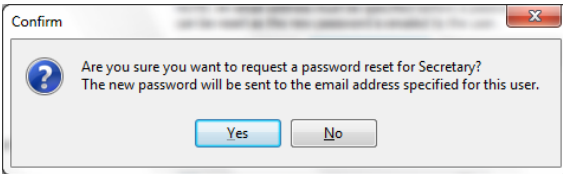
The Administrator will need to access **Practice Details | Users** to 'Restore' the User



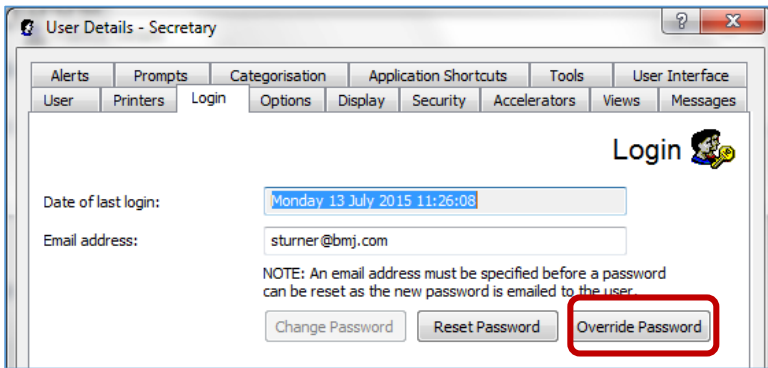


Reset Password

The Administrator can 'Reset Password'

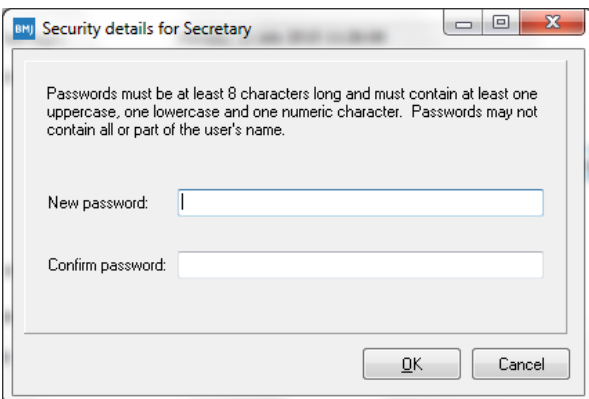


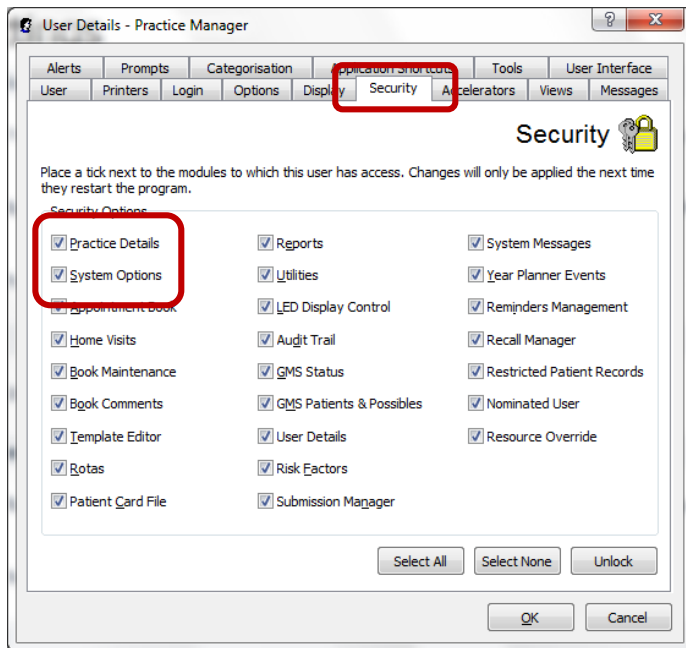
OR



Override Password

The Administrator can 'Override Password'

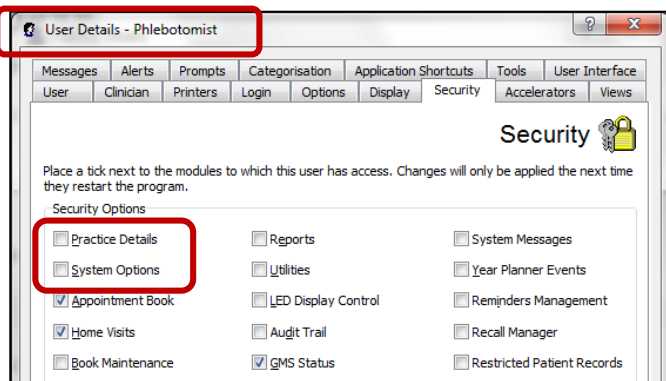




Administrator - Security

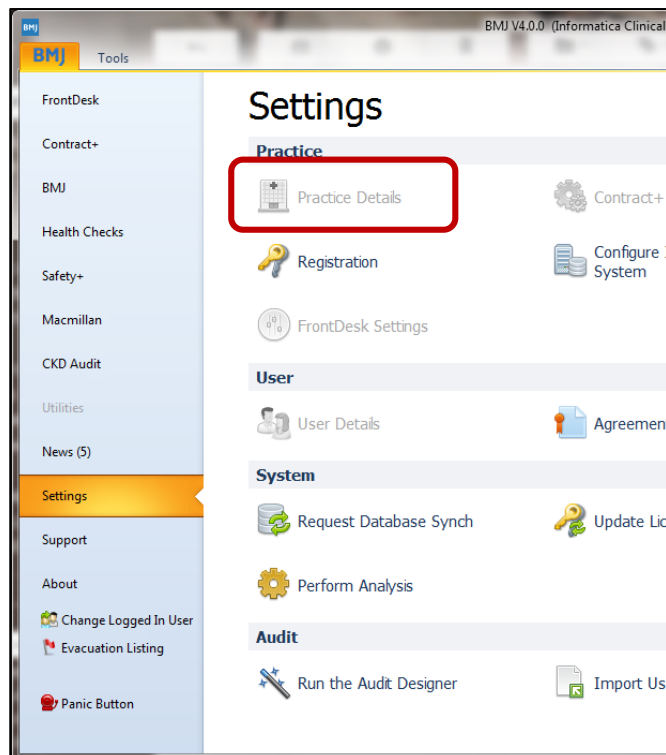
Users with **Practice Details** and **System Options** **Security** can request password reset for any user, otherwise users may only change their own passwords.

This tab shows which areas of BMJ an individual user has access to. The administrator will normally define the security settings for the individual user. In order to restrict a user's Security options it is necessary to restrict access to Practice Details otherwise the user will be able to change the security settings. The security options will be visible, but greyed out, so the user can see what restrictions are in place but cannot change them.



To set security levels - with the user logged out of BMJ - go to **Practice Details** and click on the **Users** tab. Highlight the user's name and double click or click on **Edit**. Click on the **Security** tab.

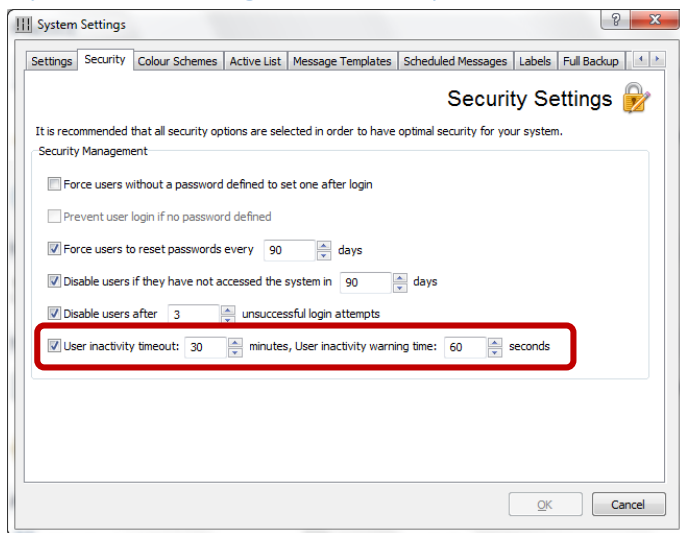
Untick the modules to which the user is not to have access. Click on **OK** to save the changes. When the user logs back in, they will only have access to the modules which were ticked in the list.



Security

For some modules if access is not granted the icon will appear 'greyed out' for other modules it will not appear at all.

System Settings - Security



System Settings – Security

Two new System Settings have been added into the Security window:

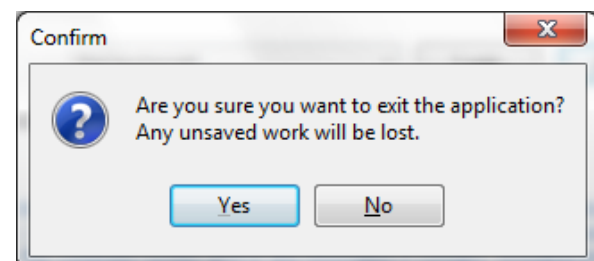
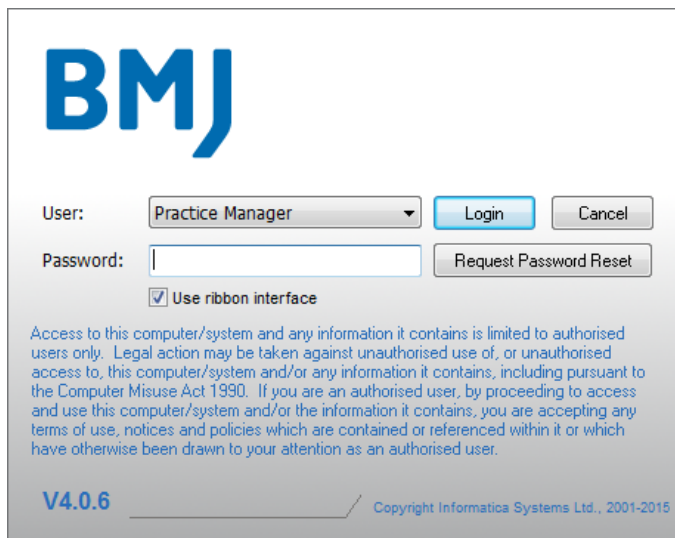
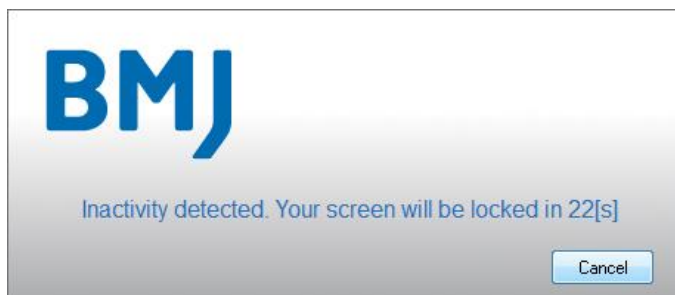
- **User inactivity timeout (default: 30 minutes)**
- **User inactivity warning time (default: 60 seconds)**

If there is no activity on the PC (within the windows system) for the period of time defined a 'popup' message will be displayed 'Inactivity detected. Your screen will be locked in xxx(s)'. The warning will be displayed for the number of seconds defined (default 60) with a countdown display in the box.

If a user clicks 'Cancel' in the popup message during the countdown period they will return to the application and be able to continue with any activity they had started (e.g. booking an appointment).

If they do not click 'Cancel' during the countdown period the screen will be locked and the User will need to re-enter their Password. They will return to the application and be able to continue with any activity they had started.

Alternatively if another user wishes to log in they will need to close the application by clicking on the 'Close' button.

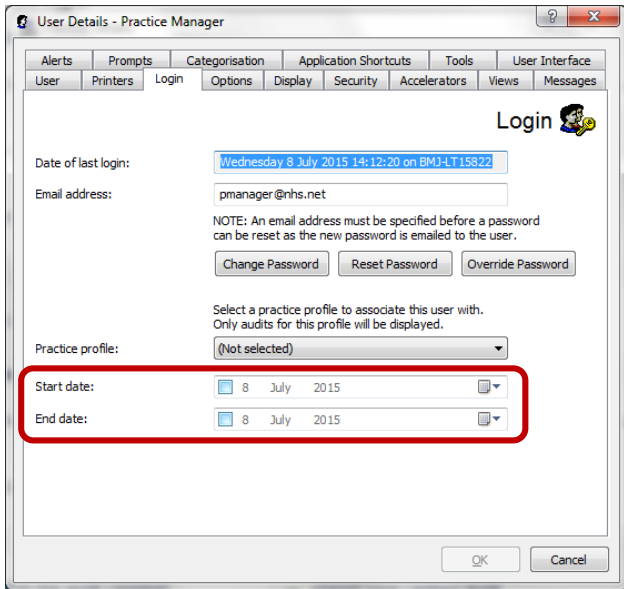


User Inactivity

A warning message will be displayed 'Are you sure you want to exit the application? Any unsaved work will be lost'. If the user clicks 'Yes' BMJ will close.

NOTE: Any incomplete activity, such as booking an appointment or running a report will not be saved.

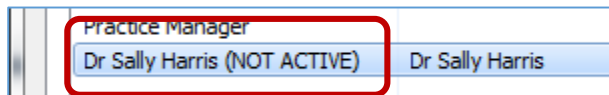
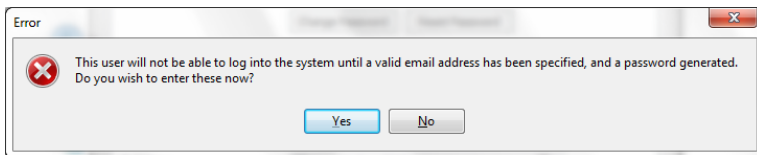
User Details – Restrict the period of user activity



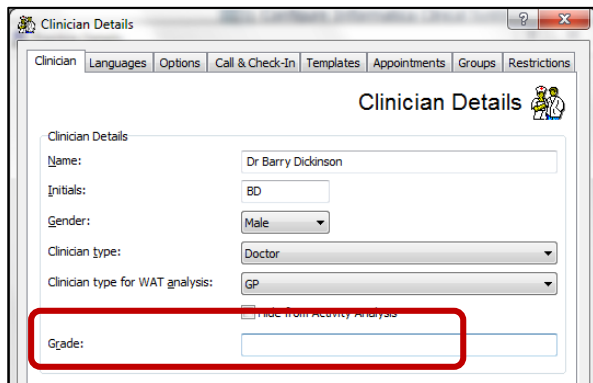
User Details | Restrict the period of user activity

This option has been added to User Details | Login to restrict the period of user activity, to accommodate long term leave (such as maternity leave), multiple short term contracts (such as summer administrative staff) or locums.

To enable this restriction select a Start date and End date. If the option is enabled, users will be marked (NOT ACTIVE) outside of these dates and they will only be visible on the user list when 'Show All' is enabled. They will not be able to log on to the system (they will not appear in the dropdown list). For permanent users this option need not be enabled.



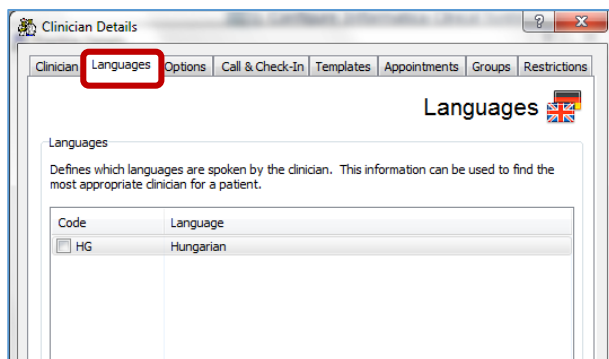
Clinician Details – Grade & Languages



Clinician Details - Grade

Grade can be added to the Clinician Details. This is an optional free text field.

These details may be used to find an appropriate appointment by use of 'Filter' and/or 'Accelerators' in the appointment book.



Clinician Details - Languages

Languages spoken by each clinician may also be added to the Clinician Details, these are user defined and each language will only need to be added once.

These details may be used to find an appropriate appointment by use of 'Filter' and/or 'Accelerators' in the appointment book.

Practice Details – Locations & Contacts

Practice Details

Clinics Resources Users Accelerators Views Servers Profiles Languages
Practice **Contacts** Locations Clinicians Shared Types Reasons Specials

Practice

Name: The BMJ Surgery

Name for legal purposes:

Address: High Street
London

Postcode: NN1 4AA

Telephone number: 020 7845 2323

Facsimile number:

Email address: name@thesurgery.nhs.uk

ODS Code:

England

Close Cancel

Practice Details | Practice

Additional information may now be stored in Practice Details:

Name for legal purposes

ODS Code

Practice Details | Location Details

Additional information may now be stored in Location Details:

Address & Postcode

Location Details

Location **Contacts** Computers

Location

A location describes a place at which consultations can occur. These normally include the main practice location and all branches. A location is an additional attribute that can be added to appointments.

Name: Branch Surgery

Code: BS

Next call number to allocate: 0

Name to show on web page: Branch

Registered surgery name:

Address:

Postcode:

OK Cancel

Location Details | Contacts

Multiple telephone numbers can be entered & defined via the Contacts tab associated with the Location

Multiple email addresses can be entered & defined via the Contacts tab associated with the Location

Location Details

Location **Contacts** Computers

Contacts

You can define a number of telephone numbers and e-mail addresses for this location.

Name	Details
Keith Smith	0208 445684
Paul Jones	pauljones@nhs.net

New Edit Delete

OK Cancel

Practice Details

Clinics **Resources** Users Accelerators Views Servers Profiles Languages
Practice **Contacts** Locations Clinicians Shared Types Reasons Specials

Contacts

You can define a number of additional telephone numbers and e-mail addresses for the practice.

Name	Location	Details
Locum GP Smith	Branch Surgery	0208 456 3456
Locum Nurse Jones	Branch Surgery	locumjones@nhs.uk
Keith Smith	Main Surgery	0208 445684
Paul Jones	Main Surgery	pauljones@nhs.net

New Edit Delete

Close Cancel

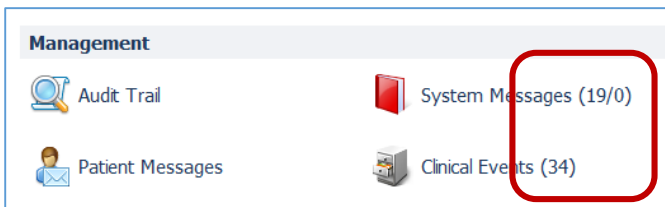
BMJ ICON



BMJ Icon

The new client system tray icon in V4 will be known as the **BMJ icon** and the icon will be the **blue/white** BMJ logo.

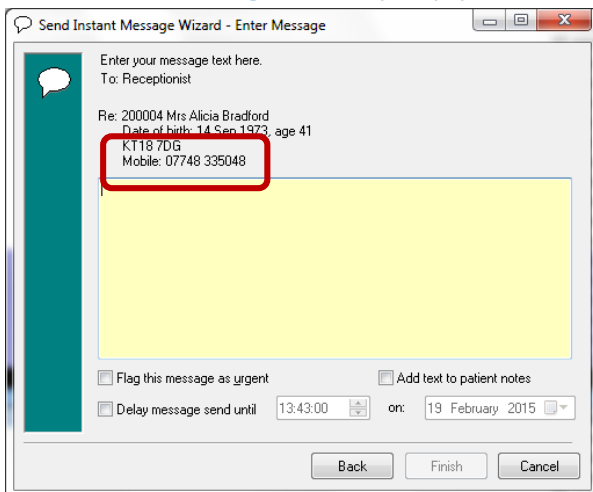
Indicator of number of outstanding System Messages & Clinical Events



System Messages & Clinical Events

The number of outstanding System Messages and Clinical Events are shown in brackets on the main menu.

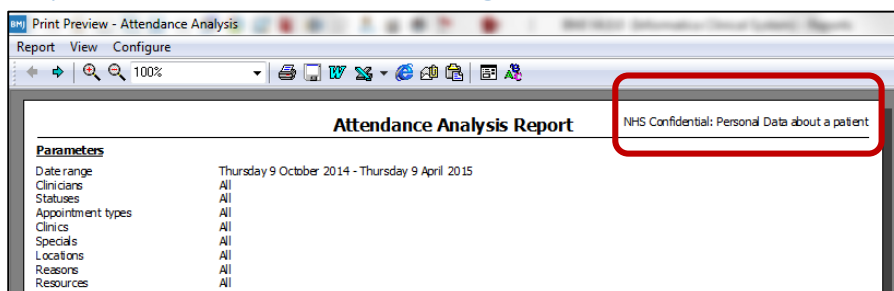
Instant Message – Display patient’s mobile number



Send Instant Message Wizard

When sending an Instant Message about a patient the Mobile number will now show in the details (in addition to the address and home telephone number)

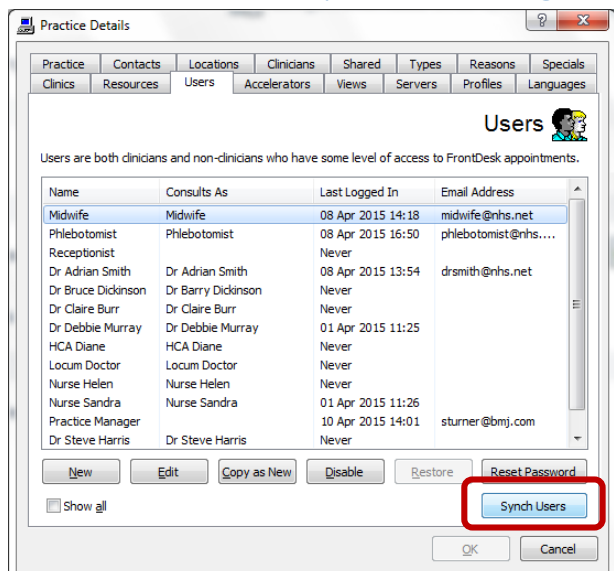
Reports - Protective labelling of Information



Reports – Protective labelling of information

A generic label has been added to all reports that may contain patient identifiable data in line with NHS requirements.

Allow Users data sync before Agreements are actioned



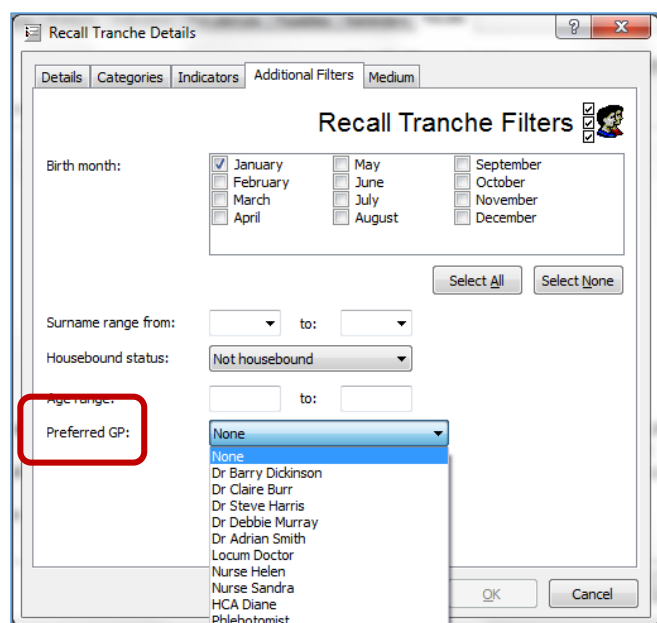
Practice Details - Users

A new/fresh installation cannot accept agreements (Note: 'Default' user is not allowed to be a nominated user).

A new 'Sync Users' function has been added to Practice Details.

This will extract users from the clinical system so that users can be set to **Nominated User** status and accept the agreements.

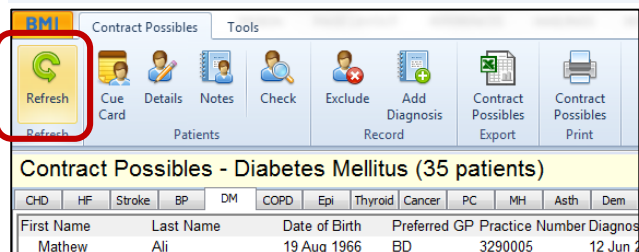
Contract+ - Additional Recall Tranche Filters



Recall Tranche Details | Additional Filters

There is a new option to select Preferred GP when setting up recall tranches. This can be found at Settings | Contract+ Settings | Recalls | Recall Tranche Details | Additional Filters)

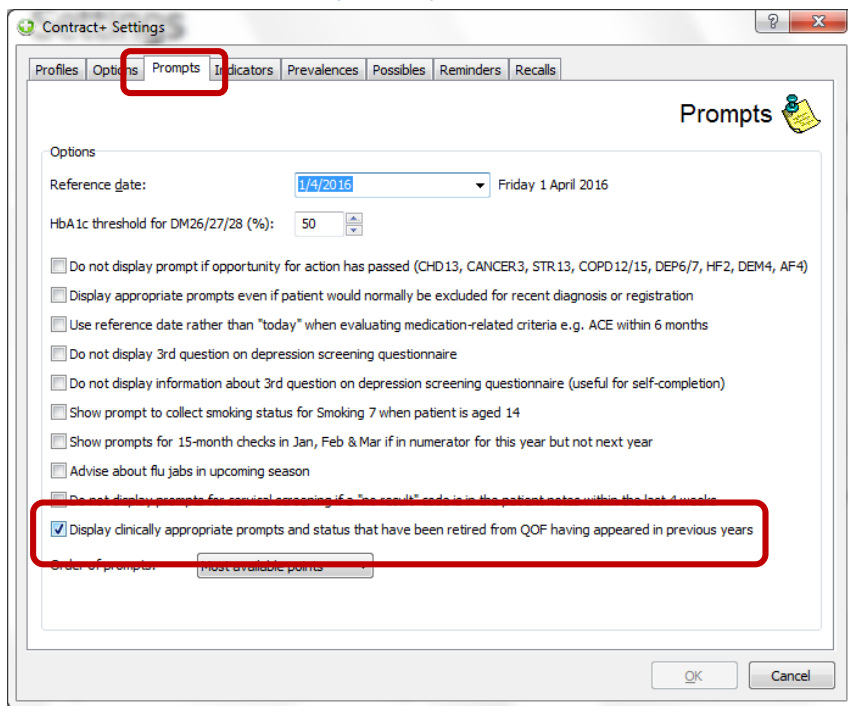
Refresh option for Contract Possibles



Refresh

A Refresh button has been added to the Contract Possibles screen.

Contract+ - Enable prompts for some retired QOF indicators



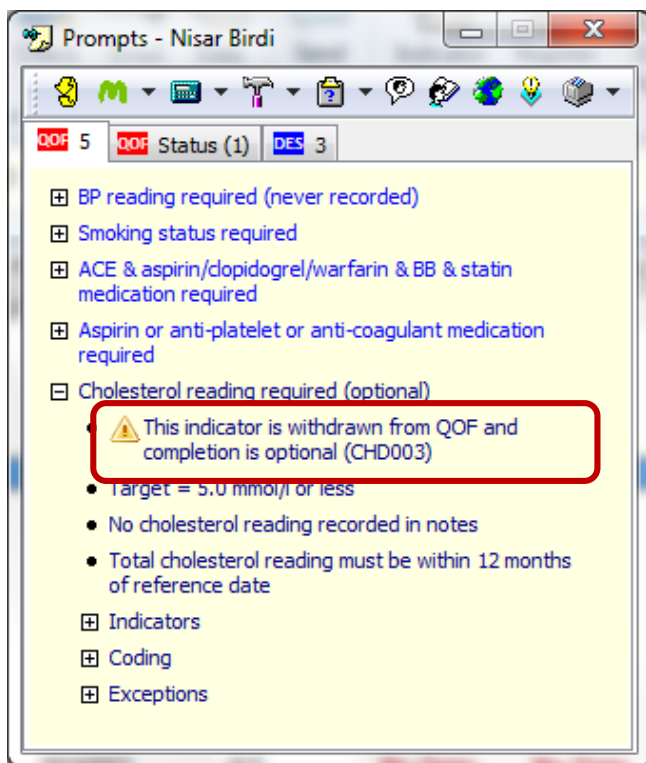
Enable prompts

The option to support retired QOF indicators has been enabled again.

Go to [Contract+ Settings | Prompts tab](#).

Check the option **'Display clinically appropriate prompts and status that have been retired from QOF having appeared in previous years'**.

The current list of indicators is:
 chd003, stia004, stia005, dm004, dm005, dm006, dm009, thy001, thy002, cvdpp002, pad003, ld002, copd004



The Indicator is withdrawn

Prompts will be shown with a yellow warning triangle and the text **'This indicator is withdrawn from QOF and completion is optional'**.

Prevalence figures to show on Contract Status screen (hint/tooltip)

Completed	Actual %	Target %	Points	Value	Remaining
			106.00/62	£10,460/£99,216	520.00/£88,755
0.605%	3.378%	4.00/62	0	£634/£9,826	58.00/£9,193
0.000%	0.712%	1.00/140	0	£4,596	25.00/£4,596
0.672%	1.712%	3.00/175	3	£7/£3,487	20.00/£3,170
0.756%	1.312%	3.00/229	3	£1/£4,121	20.00/£3,170
0.303%	3.758%	5.00/134	5	£51/£14,106	83.00/£13,155

Prevalence Figures

A tooltip will be shown when holding the cursor over the prevalence figures on the Contract Status screen showing the prevalence adjusted figures.

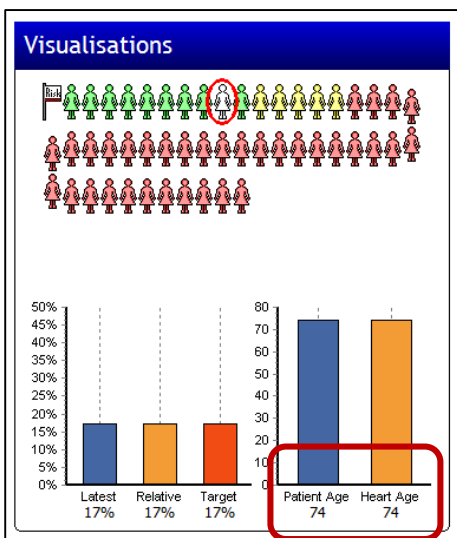
Extra column in the Contract Patients AF tab

CHD	HF	Stroke	BP	DM	COPD	Epi	Thyroid	Cancer	PC	MH	Asth	Dem	Dep	CKD	AF	Obesity	LD	Smok	CS	PP	SH	Osteo	PAD	RA	Rec
First Name	Last Name	Date of Birth	Preferred GP	Practice Number	Calc.CHADS2	Rec.CHADS2	Target	CHADS2	CHADS2=2+																
Evlis	Appleyard	13 Aug 1967	AS	2060009	0	0/0	-	-																	
Melsadia	Battle	2 Mar 1959	SH	2060002	0	0/0	-	-																	

Contract Patients AF Tab

An extra column has been added to the Contract Patients AF tab called 'Rec.CHADS2'. This column shows the latest recorded CHADS2 score in the patient records.

Health Checks - display heart age figure on Visualisations tab



Heart Age

The actual figure for Heart Age is now displayed on the Health Checks | Visualisations tab.

Introduce Range Checks for Health Checks Templates

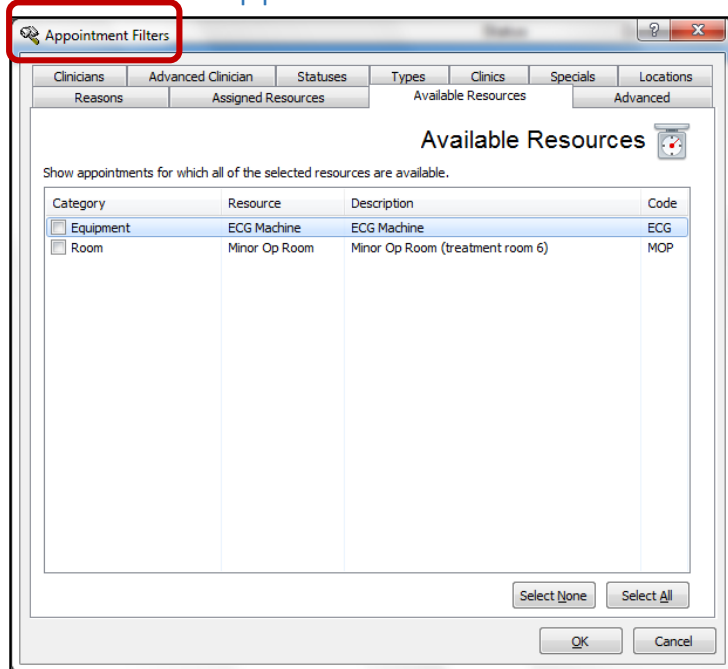
The screenshot shows a form with fields for Height, Weight, BMI, Blood Pressure, and Physical Activity. A pop-up message is displayed over the Blood Pressure field, which contains the value '400/100 mmHg'. The message reads: 'Blood Pressure (mmHg) Out of date: recorded on 30/12/1899 Out of range: The systolic pressure is expected to be between 30 and 300, and the diastolic is expected to be within 20 and 300'.

Range Checks

Range checks have been introduced for some entries in the Health Checks templates to prevent accidental entry of wildly incorrect values. The ranges are the same as those already used in the Community Health Checks: Values outside of the specified ranges will generate a pop up warning message and will not allow the user to proceed.

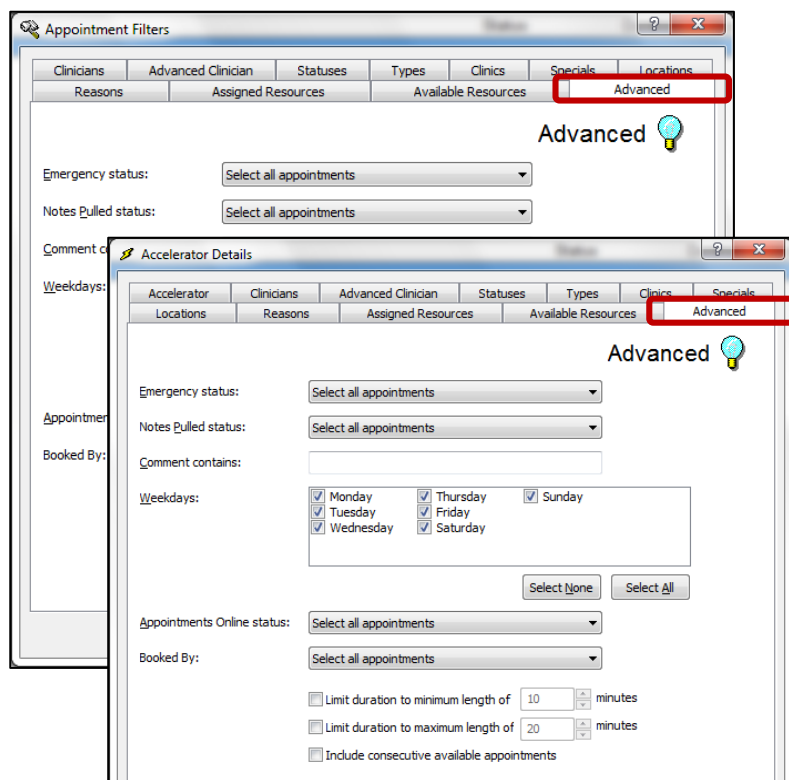
BP Systolic: Between 30 and 300, BP Diastolic: Between 20 / and 300, APBI: Between 0 and 10, FEV1: Between 0 and 100, Pulse rate: 1 or more, Triglycerides: Between 0.1 and 250, Serum Creatinine: Between 0.1 and 700, RPG: Between 0.1 and 50, OGTT: Between 0.1 and 50, Height: Between 1 and 3 (unit is m), Weight: Between 30 and 250 (unit is kg) LDL Cholesterol, HDL / Total: Cholesterol: no negative values.

FrontDesk - Appointment Filters & Accelerators



FrontDesk Appointment Filters & Accelerators

The Advanced tab now includes the option to search by minimum and / or maximum duration with the option to include consecutive available appointments



FrontDesk Appointment Filters & Accelerators

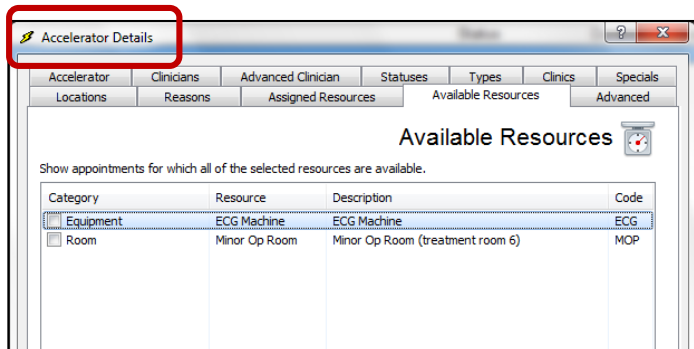
Additional functionality has been added to the 'Filter' functionality & 'Accelerators' in the appointment book. The following tabs have been added :

Assigned resources (resources assigned to the appointment slots)

Available resource (slots for which the resources are available)

Advanced Clinician (addition of Grade and Language filters)

Reasons



FrontDesk Report – Grade & Language

Appointment History

Reasons Assigned Resources Available Resources Advanced Patient
Report Clinicians Advanced Clinician Statuses Types Clinics Specials Locations

Advanced Clinician Details

Setting these filters will further limit the list of clinicians selected on the Clinicians tab.

Gender: No filter
Grade: No filter
Language: Hungarian
Clinician Type: Hungarian

Doctor
 Consultant
 Registrar
 Nurse
 Prescribing Nurse
 Locum
 Health Care Assistant
 Other Health Professional
 Phlebotomist

Select None Select All

Don't print header information

Run Cancel

FrontDesk Appointment History Report

Additional Clinician details may be included in the Appointment History Report from the Advanced Clinician Details tab e.g. **Grade & Language**.

FrontDesk - Appointment Reasons

Practice Details

Clinics Resources Users Accelerators Views Servers Profiles Languages
Practice Contacts Locations Clinicians Shared Type Reasons Specials

Appointment Reasons

You can define a number of reasons for appointments. These may overlap with appointment types, but may be used to specify further information such as if the appointment is routine, for minor surgery, travel advice etc.

Reason	Code
Travel Advice	TA
Minor Surgery	MS

New Edit Delete

OK Cancel

FrontDesk Appointment Reasons

Appointment reasons may be defined in **Practice Details | Reasons**.

This is not a mandatory field and the default for all appointments will be 'No Reason Defined'.

Reasons may be added to appointments after they are booked or used to define appointments in **Book Maintenance / Template Editor**. For free text reasons users may use the appointment comment box as previously.

Appointment Details

Appointment History Patient Audit Messages
Appointment Clinician Resources Other Audit Patient Information Alerts Options Access

Appointment Details

Patient: Mrs Katie Grace (KT18 7TQ)
Scheduled start: 16:40 Thursday 19 February 2015 (Dr Bruce Dickins)
Status: Scheduled
Duration: 10
Embargo: Not embargoed
Web booking possible until: Not bookable over the web
Type: Consultation
Location: Main Surgery
Clinic: Not a clinic
Special: Not a special
Slot Comment:
Reason: No reason supplied
Comment: Minor Surgery

Notes OK Cancel

FrontDesk Appointment Reasons

Reasons may be added to appointments after they are booked. For free text reasons users may use the appointment comment box as previously.

Reasons may be added to define appointments in **Book Maintenance / Template Editor**.

Appointments - Dr Bruce Dickinson - SINGLE: Tomorrow							
BD-SINGLE: Tomorrow							
DOCTORS: Tomorrow							
NURSES: Tomorrow							
OVERVIEW: Tomorrow							
Time	Where	Description	Status	Duration	Type	Special	Reason
11:50 AM		Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC		
12:00 PM		Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC		
12:10 PM		Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC		
12:20 PM		Telephone Consultation:		10 mins	TelC		
END OF SURGERY:							
2:30 PM		Mrs Alicia Bradford:	Scheduled	20 mins			Minor Surgery
2:40 PM		XXX NOT AVAILABLE:		10 mins			
2:50 PM		[WEB]:		10 mins			
3:00 PM		EMBARGOED: Release tomorrow:		10 mins			
3:10 PM		EMBARGOED: Release tomorrow:		10 mins			
3:20 PM		[WEB]:		10 mins			
3:30 PM		[WEB]:		10 mins			

FrontDesk Appointment Reasons

A new column is visible in the Appointments Book

FrontDesk - Resource Details

Resource Details

Resource

Resources are attributes that can be optionally attached to any appointment. They are intended to show any requirements for the appointment, such as equipment, a particular room, or the presence of a person with a specific skill – usually external/non-practice staff such as an interpreter.

Category: Equipment

Name: ECG Machine

Code: ECG

Description: ECG Machine

Lead in time (min): 5

Lead out time (min): 5

Restrictions: Prevent overlapping resource use

FrontDesk Resource Details

Resources for use in the practice can be defined and allocated to an appointment or a slot. Resources are defined in Practice Details | Resources.

Each resource must be entered separately (for example if there are 3 Blood Pressure Monitors then enter BP1, BP2, BP3).

There are four types of resource: Equipment, Room, External person and Other.

To set up a new resource: Click 'New' - Select a category from the drop down list - Give the resource a code and a description - Define 'Lead in / Lead out' times if appropriate (i.e. time when the resource is not available due to cleaning / transport etc).

FrontDesk Resource Details

Select a Restrictions category from the dropdown list. Resources may be set to the following restrictions (includes the lead in/out time which may mean a resource may not be used for consecutive appointments):

'Prevent overlapping bookings' - no overlapping allowed by any user.

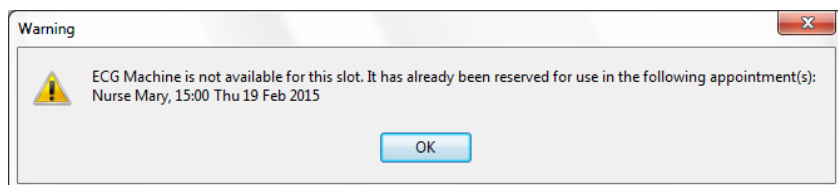
'Allow all users to book overlapping use' - no restrictions on booking appointments with this resource but a warning will be given on an individual slot / appointment basis, when multiple editing of slots the resource tab will not be displayed.

'Allow specified users to book overlapping use' - only users with Security option 'Resource Override' can book appointments which overlap the use of this resource.

FrontDesk Resource Details

Resources may be allocated to a slot in Template Editor or Book Maintenance or to an appointment at the time of booking or afterwards (to allocate at the time of booking ensure user Options | Display Details no: 54 is enabled).

If an attempt is made to allocate a resource that has already been allocated a warning message will be shown describing where the resource is has been allocated.



Overlapping resources will not be checked across different templates until these are copied into the book. If appropriate a warning will be given when the appointment book has been made up if slots have not be copied into the book due to overlapping resource use or if overlapping use is allowed an option will be given as to whether the operation should proceed.

Resource allocation can only be edited on an individual slot / appointment basis, when multiple editing of slots the resource tab will not be displayed.



Resource
Availability

FrontDesk Reports

There are 3 new reports designed to manage the new **Resources** functionality:



Resource
Conflicts

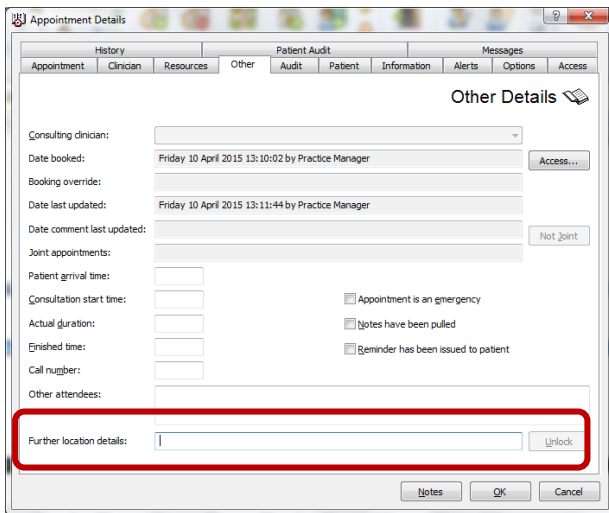
Resource Availability, Resource Conflicts and Resource Utilisation.

These reports may be configured to suit the users' requirements and all the reports include the option to include appointments/slots without any assigned resources.



Resource
Utilisation

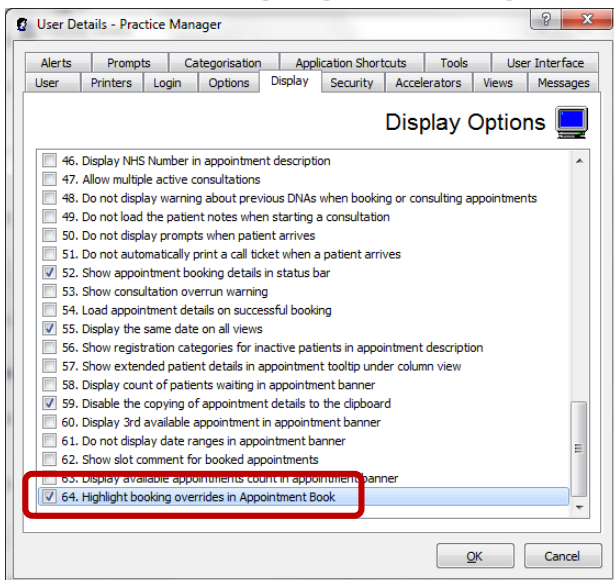
FrontDesk - Further location details



Appointment Details | Further location details

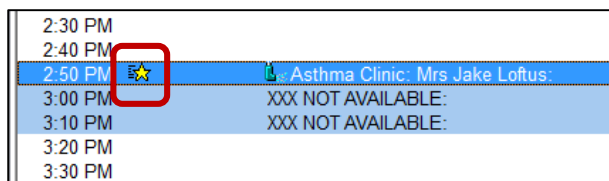
A free text box has been added under Appointment Details | Other to record 'Further location details'.

FrontDesk – Highlight booking overrides in Appointment Book



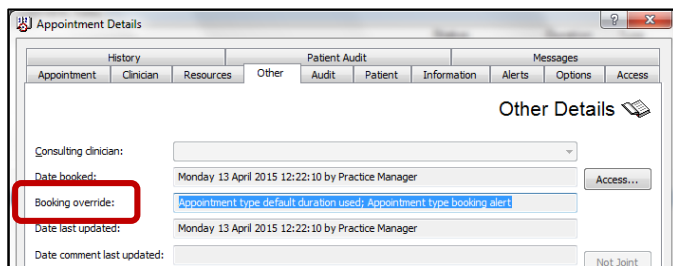
User Details | Display

A new user option has been added (Display Details 64) 'Highlight booking overrides in Appointment Book'.



Appointment Details - Other

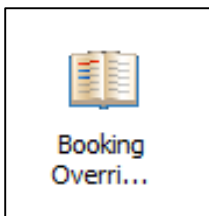
When this option is enabled a 'Star' icon will appear to the left of the patient name any time a warning message has been overridden / acknowledged (for example default duration override, booking embargo override, patient offered joint appointment).



Appointment Details - Other

There is a field in Appointment Details | Other 'Booking override' which lists all overrides which are also shown in a tooltip.

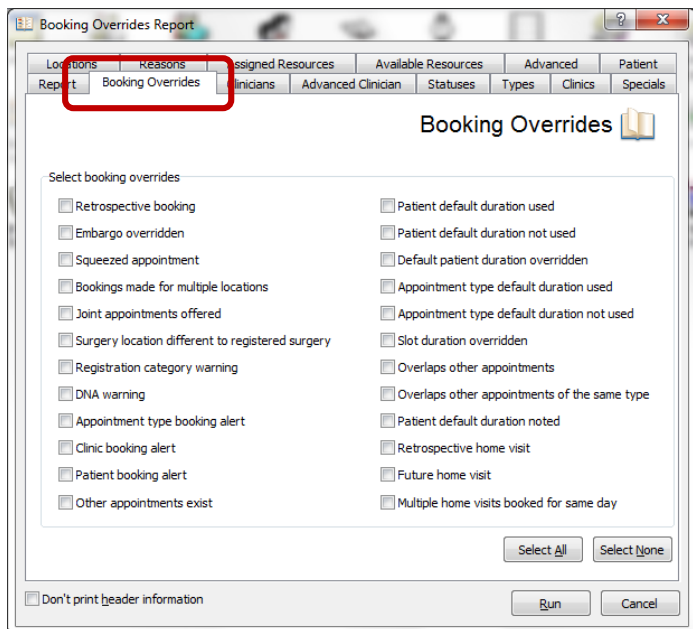
FrontDesk – Booking Overrides Report



FrontDesk - Booking Overrides Report

A new report has been added to the Reports module to report on the rules and restrictions that have been overridden when booking appointments (for example Embargo overridden, DNA warning and many more). The report is configurable by selecting from the 'Booking Overrides' tab.

All the normal filters such as Clinician, Advanced Clinician, and Appointment Types etc: are available for this report.

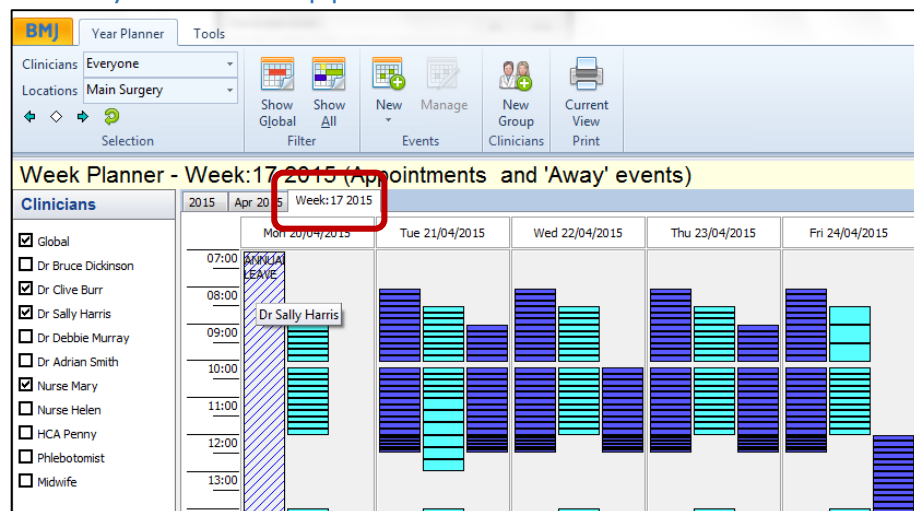


Weekly detailed appointments view added to Year Planner

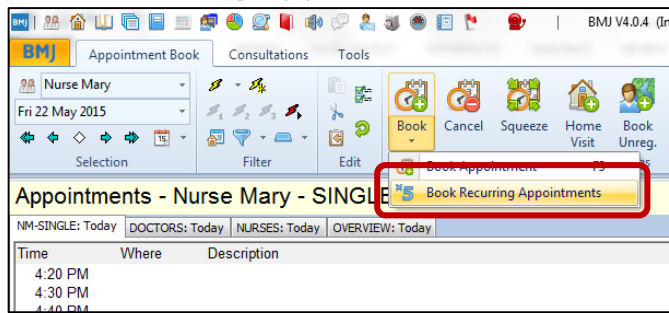
FrontDesk – Weekly detailed Appointments

A detailed view of weekly appointment slots per clinician has been added as a separate tab to the Year Planner. Normal opening hours for the practice can be set in Practice Details | Opening hours. This setting affects the display in this view but does not restrict the slots that can be made up in the book.

The 'Week' tab shows all slots/appointments and away events in the same view. The clinicians are colour coded as per the year planner and booked appointments display in a darker shade. When space allows the clinician's name displays.

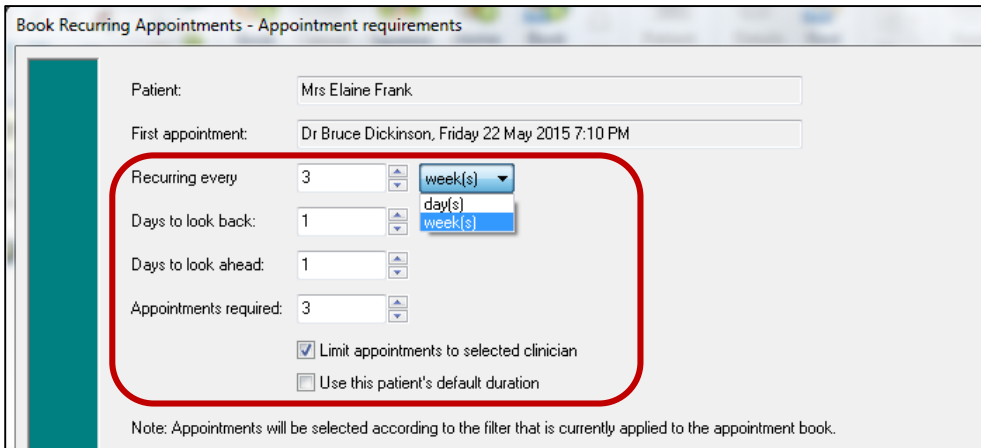


Book recurring appointments



FrontDesk – Book recurring appointments

New functionality has been added to Book Recurring Appointments i.e. schedule multiple appointments. Select 'Book Recurring Appointments' from the Book drop down menu in the Appointment Book



FrontDesk – Book recurring appointments

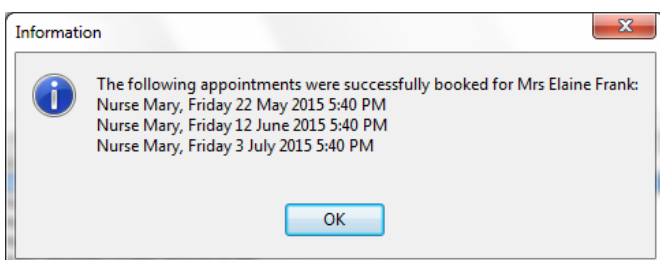
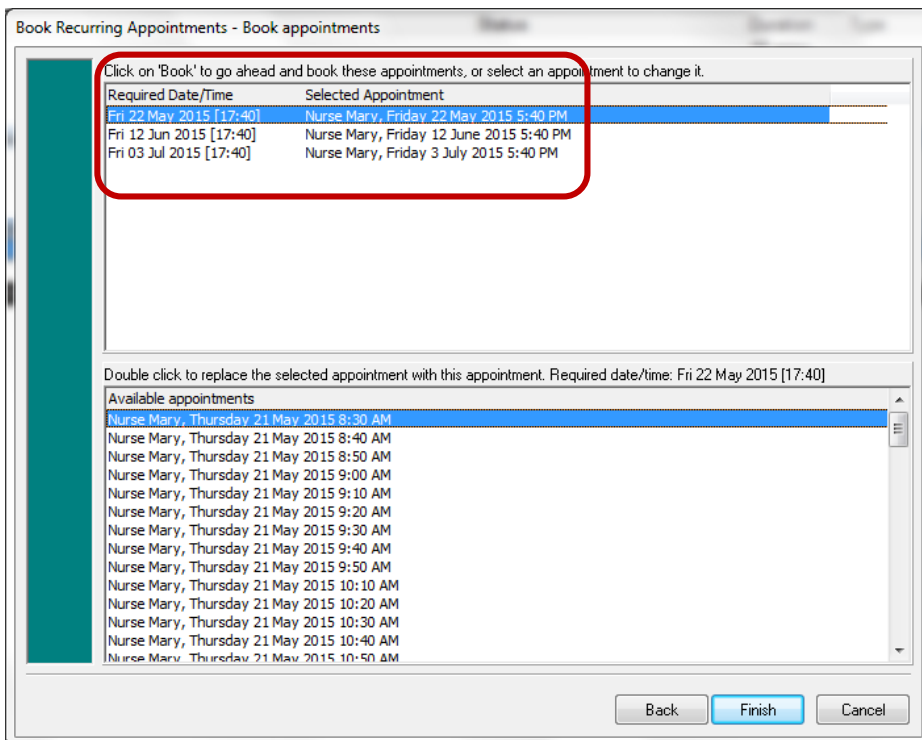
Select a patient, the 'Book Recurring Appointments – Appointment Requirements' screen will be displayed giving the option to schedule the appointments.

'Recurring every': select from 'day(s)' or 'week(s)'

'Days to look back' and 'Days to look ahead' may be specified.

The default is to 'Limit appointments to the selected clinician'. NOTE this must be unticked to allow appointments with other clinicians to be offered.

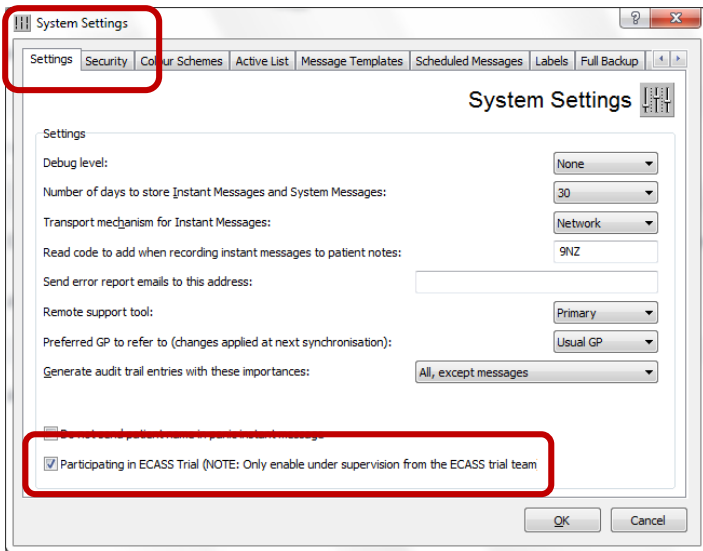
'Use this patient's default duration' is unticked by default.



FrontDesk – Book recurring appointments

The above screen will give the user the option to change the offered appointments individually from a list of available appointments. If no appointments are available within the parameters set then none will be offered.

ECASS Trial

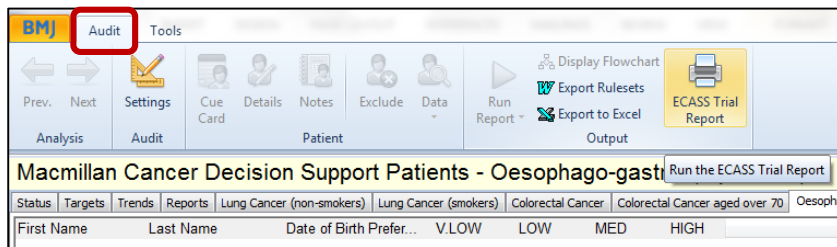


ECASS Trial

There is a switch in System Settings to enable a practice to participate in ECASS Trial.

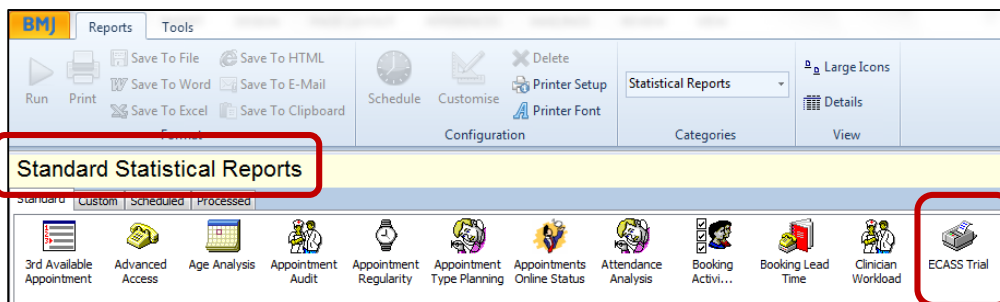
For participating practices each time the eRAT Oesophago-gastric Calculator is used an entry will be saved into Clinical Events (visible only when local codes are enabled), each time the calculator is used.

The additional data will not be pushed back into the clinical system. Only the score and symptoms as previously.



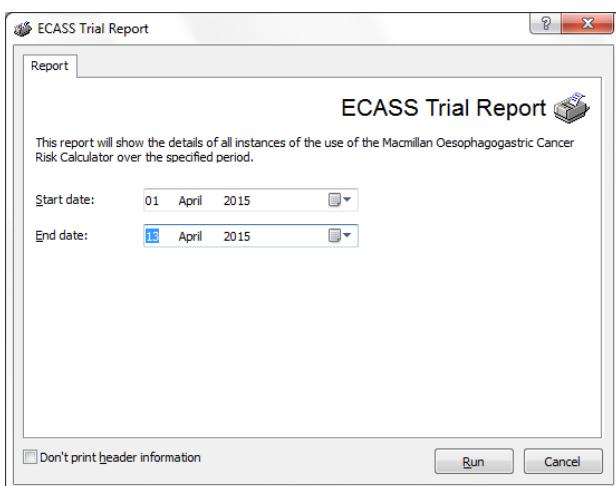
ECASS Trial Report

There is a reporting option 'ECASS Trial Report' from the Audit or Standard Statistical Reports page.





ECASS Trial Report

The report will show the details of all instances of the use of the Risk Calculator over a specified period.



Useful Contact Details

If you require any assistance with the upgrade process, please contact Support:

	0845 680 1898 (Option 2)	Lines open from 8.00am to 5:30pm Monday to Friday (closed on Bank Holidays in England)
	informaticasupport@bmjgroup.com	Please provide a contact name and number, practice NHS National code *and* a 'Reply to' email address

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