

BMJ Version 4 User Guide

Document Version 1:0 Date: July 2015

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BMJ Publishing Group Ltd Registered office: BMA House Tavistock Square London WC1H 9JR United Kingdom Registered in England No. 3102371 VAT registered No. GB 674 7384 91

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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 <u>password</u> 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).

Accelerators Practice Locations	Views Clinicians Shared	Servers Types Specials Clin	Profiles ics Users	Practice Details Users
ers are both clinicians ar	d non-clinicians who have some	e level of access to FrontDesk	appointments.	Remove all users who no longer require a Login for BMJ.
Name Phlebotomist Receptionist Dr Bruce Dickinson Dr Bruce Dickinson	Consults As Dr Adrian Smith Dr Bruce Dickinson	Last Logged In Never Never 08 Apr 2015 12:22 Never	Password? No No Yes No	Select/highlight the user required
r Cive Bur r Dave Murray lealth Care Assistant lurse Katie lurse Mary ractice Manager ir Steve Harris	Dr Dave Murray Dr Steve Harris	Never 13 Apr 2015 16:57 Never Never 25 Mar 2015 10:04 Never	No No No Yes No	Click Delete
				Click Yes to confirm
Show <u>a</u> ll	<u>N</u> ew <u>E</u> dit <u>C</u>	opy as New Delete	Restore	
		Co	onfirm	×
			Are you	sure you want to delete user "Dr Clive Burr"?

Yes

No

Login

User: Receptionist Login Cancel Password: Use ribbon interface Cocess 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 users only. Legal action may be taken against unauthorised use of, or unauthorised users only. Legal action may be taken against unauthorised use of, or unauthorised users only. Legal action may be taken against unauthorised use of, or unauthorised users only. Legal actions may be taken against unauthorised use of, or unauthorised users only. Legal actions and/or any information it contains, including pursuant to he 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 erms 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.		BMJ		
Password: Use ribbon interface Access to this computer/system and any information it contains is limited to authorised sers 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 he 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 erms 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.	User:	Receptionist 🗸	Login	Cancel
Use ribbon interface Access to this computer/system and any information it contains is limited to authorised sers 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 he 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 erms 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.	Password:	1	Request Pas	sword Reset
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 he 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 erms of use, notices and policies which are contained or referenced within it or which ave otherwise been drawn to your attention as an authorised user.		Vse ribbon interface		

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 – Security

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

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

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

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

BI	٩J						
User:	Dr Adrian Smith 🔹	Login Cancel					
Password:	•••••	Request Password Reset					
	Vse 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 1930. 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.							
V4.0.6	/ Copyrigh	nt 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 <u>new</u> 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**

BMJ Security details fo	r Dr Bruce Dickinson 🗖 🗖 💌						
A new password m long and must cont numeric character. new password may	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.						
Current password:	•••••						
New password:	••••••						
Confirm password:							
A valid email addre to your password.	A valid email address is required so that you can be notified of changes to your password.						
Email address:	bdickinson@nhs.net						
	<u>о</u> к						

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



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** <u>new</u> **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.

Security details for Dr Clive Burr	Password
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. Current password:	The following window will appear. The user is unable to close this window, or continue, until a new password is entered.
New password: Confirm password:	
BMJ Password Change	🖶 🛛 BMJ Password Change
no-reply@informatica-systems.co.uk 09:55 (27 m to me The password for your BMJ account has been changed. If you did not make contact your administrator immediately.	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)

KI	MI		Login
	· • •		Select your name from the User : drop down list & select
User:	Dr Diane Murray 🔹	Login Cancel	Login
Password:		Request Password Reset	
	Use ribbon interface		
nd use this co rms of use, n ave otherwise V4.1.0	Indus ACLTSD. In you are an additionated us imputer/system and/or the information it cont otices and policies which are contained or re been drawn to your attention as an authoris Copyright 1	an by proceeding to access ains, you are accepting any ferenced within it or which ed user.	
Security d	letails need to be updated for Dr Dia	ne Mu 🗆 🛛 💌	Password & Email address
A new pas long and r numeric c	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all d	ne Mu	Password & Email address The following window will appear. The user is unable t
A new pas long and r numeric cl Current pa	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all o assword:	ne Mu	Password & Email address The following window will appear. The user is unable t close this window, or continue, until a password and
A new pass	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all o assword:	ne Mu be at least 8 characters lowercase and one or part of your name.	Password & Email address The following window will appear. The user is unable t close this window, or continue, until a password and Email address is entered .
A new pass long and r numeric cl Current pa New pass Confirm pa	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all o assword: word: assword:	ne Mu	Password & Email address The following window will appear. The user is unable t close this window, or continue, until a password and Email address is entered .
A new pas long and r numeric ci Current pa New pass Confirm pa A valid en to your pa	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all of assword: word: asswo	ne Mu	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.
A new pas long and r numeric cl Current pa New pass Confirm pa A valid en to your pa Email add	etails need to be updated for Dr Dia ssword must be defined. Passwords must nust contain at least one uppercase, one haracter. Passwords may not contain all of assword: word: asswo	ne Mu	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		
Incorr	rect password. You have 2 attempts remaining before this account is disabled.	Error - Incorrect Password
	OK	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 Inco	rrect password. You have one attempt remaining before this account is disab	Error - Incorrect Password
	OK	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	rect password. This account has now been disabled. Please contact your administr	ator. Error - Incorrect Password
	ОК	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 <u>Practice Details</u> & <u>System Options</u> (see page 14 – Administrator Security)

User Disabled

Practice Contacts Loc	ations	Clinicians	Shar	ed	Types	Rea	asons	Specia
Clinics Resources Use	rs A	Accelerators Views			Servers	Profi	les	Languag
Users who have some level of access to FrontDesk appointments.								
Name	Consu	lts As		Las	t Logged In		Email	Address
Midwife	Midwit	ie –		Nev	er			
Phlebotomist	Phlebo	otomist		Nev	er			
Receptionist				Nev	er			
Dr Adrian Smith (DISABLED)	Dr Ad	ian Smith		08 Apr 2015 13:17			sturn	er@bmj.
Dr Bruce Dickinson	Dr Bar	ry Dickinson		Never				
Dr Claire Burr	Dr Cla	ire Burr		Never				
Dr Debbie Murray	Dr De	obie Murray		01/	Apr 2015 11	:25		
HCA Diane	HCA D	iane		Nev	er			
Locum Doctor	Locum	Doctor		Never			l	
Nurse Helen	Nurse	Helen		Never				
Nurse Sandra	Nurse	Sandra		01/	Apr 2015 11	:26		
Practice Manager				08 /	Apr 2015 13	:18	sturn	er@bmj.
•		III			_	-		•
New Edit	Copy	as New	<u>D</u> isable		<u>R</u> estore		Reset	Password
✓ Show all								

Confirm	×
?	Are you sure you want to restore user "Dr Adrian Smith"?
	Yes No

Reset Password

Clinics	Resources	Users	Accelerators	Views Serve	rs Profiles	Languages	
						-	
					Use	ers 🎇	
lears are b	oth diaisian	a and non-dini	rinne whe have	a sama laval of accor	to FrontDock and		
users are b	oth cinician	s and non-cini	Jans who have	e some level of acces	s to FrontDesk app	onuments.	
Name		Consults As		Last Logged In	Email Address	*	
Midwife		Midwife		Never			
Phleboton	nist	Phlebotomist		Never			
Reception	ist			Never			
Dr Adrian	Smith	Dr Adrian Smit	th .	08 Apr 2015 13:17	sturner@bmj.co	om	
Dr Bruce D	Dickinson	Dr Barry Dicki	nson	Never		-	
Dr Claire E	Burr	Dr Claire Burr		Never		=	
Ur Debbie	Murray	Ur Debbie Mu	ray	01 Apr 2015 11:25			
HCA Diane	: stor	HUA Diane		Never			
Nurse Hel	en	Nurse Helen		Never			
Nurse San	ndra	Nurse Sandra		01 Apr 2015 11-26			
Practice M	lanager	Harac adriul d		08 Apr 2015 13:18	sturner@bmi.c	om	
Dr Steve I	Harris	Dr Steve Harr	is	Never	- and entitle		
New		<u>E</u> dit <u>C</u> op	by as New	<u>D</u> isable <u>R</u> e	store Reset	Password	
					<u>O</u> K	Cancel	
- 6							
nfirm							
nfirm	_				-		
nfirm	Are vo	u sure vo	u want to	request a pas	sword reset	for Dr Ac	Irian Smit
nfirm	Are yo	u sure yo	u want to ard will be	request a pas	sword reset	for Dr Ac	Irian Smit
nfirm	Are yo The ne	ou sure yo ew passwo	u want to ord will be	request a pas e sent to the e	sword reset mail addres:	for Dr Ac s specifie	Irian Smit d for this
nfirm	Are yo The ne	ou sure yo ew passwo	u want to ord will be	request a pas e sent to the e	sword reset mail address	for Dr Ac s specifie	lrian Smit d for this
nfirm	Are yo The ne	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: No	for Dr Ac s specifie	Irian Smitl d for this
?	Are yo The no	ou sure yo ew passwo	u want to ord will be	e request a pas e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac s specifie	lrian Smit d for this
nfirm	Are yo The ne	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac s specifie	drian Smitl d for this
nfirm	Are yo The no	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac	Irian Smitl d for this
enfirm	Are yo The ne	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac	Irian Smitl d for this
ormation	Are yo The no	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac	drian Smit d for this
ormation	Are yo The no	ou sure yo ew passwo	u want to ord will be	e sent to the e	sword reset mail addres: <u>N</u> o	for Dr Ac	drian Smit d for this
	Are yo The no	ou sure yo ew passwo ssword rese	u want to ord will be <u>Y</u> et has been	request a pas e sent to the e es	sword reset mail addres: <u>N</u> o vill be sent to	for Dr Ac s specifie the specifi	drian Smit d for this d for this d for this
	Are yo The no	ou sure yo ew passwe	u want to ord will be <u>Y</u>	e sent to the e	sword reset mail addres: <u>No</u> vill be sent to	for Dr Ac	drian Smiti d for this ed email ad

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 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

BI	MJ						
User:	Dr Adrian Smith 🔹	Login Cancel					
Password:	••••••	Request Password Reset					
	✓ Use ribbon interface						
Access to this of users only. Leg access to, this of the Computer M and use this con terms of use, no have otherwise	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 based cause to your attention access and use thorized user.						

Security details need to be updated for Dr Adrian S...

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.

V4.0.0

Current password:

New password:

Confirm password:

Error

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BMJ Password Reset

Enter the **Current password** sent in the email e.g.)D3PNaAO

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.



This password has been used previously and may not be reused.

ОК

BMJ Password Change

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

will be 'New'

<u>o</u>k

х

Request Password Reset from the BMJ Login window

BI	MJ				
User:	Midwife 👻	Login Cancel			
Password:		Request Password Reset			
Access to this o users only. Leg access to, this o the Computer M and use this co terms of use, no have otherwise	computer/system and any information it co computer/system and any information it co computer/system and/or any information it issue Act 1990. If you are an authorised mputer/system and/or the information it o tices and policies which are contained on been drawn to your attention	ontains is limited to authorised sed use of, or unauthorised it contains, including pursuant to user, by proceeding to access ontains, you are accepting any r referenced within it or which orised user.			
V4.0.0	/ Copyrig	ht Informatica Systems Ltd., 2001-2015			
Confirm Are y The r	Confirm 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. Yes No				
BMJ Passwor	d Reset 📄 Inbox x				
to me	informatica-systems.co.uk	14:17 (2 minutes ago) 🔆 🔹 🔹			
You new pa adrining adr	assword is 2U8GmkEE. If you did not request to change this passwo	his password reset then please contact your rd the next time you log into BMJ.			

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.

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



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.

Messages Alerts Pro	ompts Categorisation Application Shortcuts Tools User Interface ters Login Options Display Security Accelerators Views	Adding/Editing a User
	Login 🌆	If Yes is selected, the administrator can click on
Date of last login:	Tuesday 14 July 2015 13:00:19	the Loain tab.
Email address:	phleb@nhs.net	
	NOTE: An email address must be specified before a password	
	Change Password Reset Password Override Password	Enter an Email address and select Reset Password
	Select a practice profile to associate this user with. Only audits for this profile will be displayed.	
Practice profile:	(Not selected)	
Start date:	□ 16 July 2015 □▼	
End date:	■ 16 July 2015 ■▼	
		Request Password Reset
		The 'Confirm' window will appear prompting the
		user 'Are you sure you want to request a password
		reset?'
Are you sure you The new passwo	u want to request a password reset for Phlebotomist? ord will be sent to the email address specified for this user.	
	<u>Y</u> es <u>N</u> o	
		Request Password Reset
ormation	×	
	reset has been requested and will be sent to the specified email address	If they select 'Yes' an email will be sent to the ema
	reser has been requested and will be sent to the specifical email address.	address specified for this user containing the new
		password.
	UK	
MJ Password Res	set 📄 Inbox x	÷ 2
no-reply@inform to me	atica-systems.co.uk 16:19 (5 minutes ago) 📩	← ▼
A password reset	has been issued at 16:19 on 08/04/2015 for your BMJ account associated with	this

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



You new password is XU3?AgmK. 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.

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).



								_	
Alerts	Promp	ts Ca	ategorisation	Applic	ation Short	cuts	Tools	s	User Interf
User	Printers	Login	Options	Display	Security	Acceler	rators	Vie	ws Messa
								L	ogin 💈
Date of la	ist login:		Monday	13 July 2019	5 11:26:08]
Email add	ress:		sturner	⊉bmj.com					
			NOTE: An can be re	email addre set as the n	ss must be	specified	befor	e a pas the use	sword er.
			Change	Password	Reset	Password	i (Overrid	le Password
							J		
nfirm						X			
P Are The	you sure yo new passw	u want to i ord will be	request a pass sent to the er	word reset fo nail address s	or Secretary specified for	? this user	.		
		Ye	s l	No					
User Det	tails - Sec	retan/							2
	iuns see	ciary							
Alerts	Promp	ts Ca	ategorisation	Applic	ation Short	cuts	Tools	s	User Interfa
Alerts User	Promp Printers	ts Ca Login	ategorisation Options	Applic Display	ation Short Security	cuts Acceler	Tool: rators	s Vie	User Interfa ws Messa
Alerts User	Promp Printers	ts Ca Login	ategorisation Options	Applic Display	ation Short Security	cuts Accele	Tools rators	s Vie L	User Interfa ws Messa .ogin S
Alerts User Date of la	Promp Printers	ts Ca Login	Options	Applic Display	ation Short Security 5 11:26:08	Acceler	Tools rators	s Vie	User Interfa ws Messa .ogin S
Alerts User Date of la Email add	Promp Printers	ts Ca Login	Options Options Monday sturner@	Applic Display	ation Short Security 5 11:26:08	Acceler	Tool: rators	s Vie	User Interfa ws Messa .ogin S
Alerts User Date of la Email add	Promp Printers	ts Ca Login	Monday NOTE: An	Applic Display	ation Short Security 5 11:26:08 ss must be	specified	Tools rators	e a pas	User Interfa ws Messa .ogin S
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Alerts User Date of la Email addi Security of Password uppercas contain a New pas Confirm p	Promp Printers st login: ress: details for ds must be e.e. one low ill or part of sword: wassword:	ts Ca Login Secretar at least 8 o ercase and the user's	Monday Monday sturner NOTE: An can be rei Change Y Characters loi d one numeri name.	Applic Display 13 July 2019 gbmj.com email addre set as the ne Password ng and must c character.	ation Short Security 5 11:26:08 55 must be w passwork Reset I	specified d is emai Password	Tools rators	e a pase	User Interf, Messa ogin sword r.
Alerts User Date of la Email add Security of Password Uppercas contain a New pas Confirm p	Promp Printers st login: ress: details for ds must be e, one low il or part of sword: bassword:	ts Ca Login Secretar at least 8 dercase and the user's	Monday Monday sturner NOTE: An can be rei Change	Applic Display 13 July 2019 2019 2019 2019 2019 2019 2019 2019	ation Short Security 5 11:26:08 ss must be ew passwor Reset I	specified disemai Password	Tools rators	e a pas	User Interfa Messa .ogin sword er le Password
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The Administrator can 'Reset Password'

OR

Override Password

The Administrator can 'Override Password'

Administrator – Security



Messages	Alerts	Prompts	Catego	risation	Application	Shortcuts	Tools	User In	terfac
User (Clinician	Printers	Login	Options	Display	Security	Accele	rators	View
Place a tick they restar	next to th t the prog	e modules te ram.	o which thi	is user has	access. Cha	nges will only	Sec	urity ed the ne	xt tim
-Security C	ontions								
Security C)ptions e Details	ר	Rep	ports		Sys	tem Mess	sages	
Security C	Options e Details n Options	٦	Rep Utili	oorts		Sys	item Mess ar Planner	sages Events	
Security C	options e Details n Options ntment Boo) bk	Rer Utili	oorts ities) Display C	ontrol	Sys	item Mess ar Planner minders M	sages ^r Events lanageme	nt
Security C Practic System Appoint Home	Options te Details n Options ntment Boo Visits	ok	C Rep	oorts ities) Display C <u>d</u> it Trail	iontrol	Sys Yea Rer Rec	item Mess ar Planner ninders M call Manag	sages r Events lanageme ger	nt



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





Access to this computer system and any information it contains is limited to during 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.

V4.0.6

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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

Alerts Prompts	Categorisation	Application S	hortcuts	Tools	User Interface
User Printers Logi	n Options D	Display Securi	ty Accelerat	tors Vie	ws Messages
				L	.ogin 🕵
Date of last login:	Wednesday	y 8 July 2015 14:	12:20 on BMJ-L	T15822	
Email address:	pmanager@	Inhs.net]
	NOTE: An email address must be specified before a password can be reset as the new password is emailed to the user.				
	Change Pa	ssword	set Password	Overri	de Password
	Select a prac Only audits f	tice profile to as	sociate this use I be displayed.	er with.	
Practice profile:	Select a prac Only audits f	tice profile to as for this profile wil	sociate this use I be displayed.	r with.]
Practice profile: Start date:	Select a prac Only audits f (Not selecte	tice profile to as for this profile wil ed)	sociate this use be displayed.	er with.	
Practice profile: Start date: End date:	Select a prac Only audits f (Not selecte	tice profile to as for this profile wil ad) aly 2015 aly 2015	sociate this use l be displayed.	er with.	
Practice profile: Start date: End date:	Select a prac Only audits f (Not selecte 8 Ju	tice profile to as for this profile will ad) aly 2015 aly 2015	sociate this use be displayed.	er with.	
Practice profile: Start date: End date:	Select a prac Only audits f (Not selecte	ctice profile to as for this profile will ed) willy 2015	sociate this use l be displayed.	r with.	
Practice profile: Start date: End date:	Select a prac Only audits f (Not selecte 8 Ju 8 Ju	ctice profile to as for this profile will ed) willy 2015 willy 2015	sociate this use l be displayed.	er with.	

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.

Error	and the second se	(Inservation)	×
	This user will not be able to log into the system until a va Do you wish to enter these now?	alid email address has been specified, and	a password generated.
	Yes	No	
	Practice Manager		
	De Cellu Henrie (NOT ACTIVE)	Do Collect Lensie	
	Dr Sally Harris (NOT ACTIVE)	Dr Sally Harris	

Clinician Details – Grade & Languages

linician	Languages	Options	Call & Check-In	Templates	Appointments	Groups	Restrictio
				C	Clinician	Deta	ils 🖓
Clinicia	n Details						
Name:			Dr Barry D	Dickinson			
Initials	:		BD				
<u>G</u> ende	r:		Male	•			
Clinicia	n <u>t</u> ype:		Doctor				•
Clinicia	n type for W/	AT <u>a</u> nalysis	GP				•
			- nice inc	in Activity A	ioi yoio	`	
G <u>r</u> ade:							
						_	
Clinicia	n Details		and the second	See. 21	arrestes of		2

Clinician	anguages	Options	Call & Check-In	Templates	Appointments	Groups	Restriction
					Lan	guag	es 🙀
Language	es						
Defines v	which langua	iges are s	poken by the clini	cian. This inf	formation can be	used to f	ind the
most app	propriate clin	lician for a	a patient.				
Code		Languag	je				
Coue							
HG		Hungari	an				
HG		Hungari	an				
HG		Hungari	an				
HG		Hungari	an				
HG		Hungari	an				

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

2	Practice Details						8 ×
	Clinics Resources Practice Contacts	Users A Locations	ccelerators Clinicians	Views Shared	Servers Types	Profiles Reasons	Languages Specials
			1		.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Practio	ce 💻
	<u>N</u> ame:	The BM	J Surgery				
ſ	Name for legal purposes:						
	Agoress.	London	icci				
1	Postcode:	NN1 4A	A				
	Telephone number:	020 78	45 2323				
	Eacsimile number:						
	Email address:	name@	thesurgery.n	hs.uk			
	Desetion and and and a	#2000	<u> </u>				
	ODS Code:						
	<u>.</u>	England					
						Close	Cancel

Details	ि <mark>४ </mark>
Location Contacts Compute	ers
	Location 🗊
A location describes a place a include the main practice loca attribute that can be added to	It which consultations can occur. These normally tion and all branches. A location is an additional to appointments.
Name:	Branch Surgery
<u>C</u> ode:	BS
Next call number to allocate:	0
Name to show on web page:	Branch
Registered surgery name:	•
Address:	
Postcode:	
	QK Cancel
Details	ନ୍ଧ <mark>×</mark>
Location Contacts Comput	ters
You can define a number of t	Contacts
Name	Details
>Keith Smith	0208 445684
🖅 Paul Jones	pauljones@nhs.net
	New Edit Delete

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 | 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



BMJ ICON



BMJ Icon

The new client system tray icon in V4 will be known as the <u>**BMJ icon**</u> and the icon will be the <u>blue/white</u> 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

Print Preview - Attendance A	Analysis 🖉 🐞 👘 👘 👘	101 (Manuface Tread Labor) Reports
Report View Configure		
🔶 🌩 🔍 🔍 100%	- # 🛄 W 🍇 - 🏈 🕰 E 🦓	
	Attendance Analysis Report	NHS Confidential: Personal Data about a patient
Parameters		
Date range Clinicians Statuses Appointment types Clinics Specials Locations Reasons Reasons Reasons	Thursday 9 October 2014 - Thursday 9 April 2015 All All All All All All All All All	

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 Contact	ts Locations	Clinicians	Shared	Types	Reasons	Specia
Clinics Resources	s Users	Accelerators	Views	Servers	Profiles	Language
lsers are both clinicia	ins and non-clinici	ians who have s	some level of	access to	Use FrontDesk app	pointments
Name	Consults As	L	ast Logged I.	in	Email Address	
Midwife	Midwife	0	08 Apr 2015	14:18	midwife@nhs.r	net
Phlebotomist	Phlebotomist	0	08 Apr 2015	16:50	phlebotomist@	nhs
Receptionist		1	Never			
Dr Adrian Smith	Dr Adrian Smith	h C	08 Apr 2015	13:54	drsmith@nhs.n	et
Dr Bruce Dickinson	Dr Barry Dickin	son N	Never			
Dr Claire Burr	Dr Claire Burr	1	Vever			5
Dr Debbie Murray	Dr Debbie Murr	ray (01 Apr 2015	11:25		
HCA Diane	HCA Diane	1	Never			
Locum Doctor	Locum Doctor	1	Vever			
Nurse Helen	Nurse Helen	1	Vever			
Nurse Sandra	Nurse Sandra	0	01 Apr 2015	11:26		
Practice Manager		1	10 Apr 2015	14:01	sturner@bmj.c	.om
Dr Steve Harris	Dr Steve Harris	s N	Never			•
New	Edit	y as New	Disable	Resto	Rese	t Password
Show <u>a</u> ll					Syn	ich Users

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



Refresh option for Contract Possibles

	BMI		Contrac	t Possible	s To	ols								
	Refresh Refrech	J	Cue Card	Details Pat	Notes ients	200 Check	Exclude F	Dia	Add agnosis	Co Po: E	ntract ssibles port	Contra Possib Print	act les	
	Contra	a	ot Po	ossibl	es - D	Diabete	es Mel	llitus	s (35	pat	ients)		
	CHD	HF	Stro	ke BP	DM	COPD	Epi Th	yroid	Cancer	PC	MH	Asth	Dem	
	First Nan	ne		Last N	lame	Date	of Birth	Р	referred	GP P	ractice	Number I	Diagn	0
l	Mathe	W		Ali		19 A	ug 1966	В	D	3	290005		12 Ju	n i

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

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

Contract+ - Enable prompts for some retired QOF indicators

Contract+ Settings	
Profiles Options Prompts Indicators Prevalences Possibles Reminders Recalls	Enable prompts
Prompts 🗞	
Options Reference date: I/d/2016 HbA1c threshold for DM26/27/28 (%): 50	The option to support retired QOF indicators has been enabled again.
Do not display prompt if opportunity for action has passed (CHD13, CANCER3, STR13, COPD12/15, DEP6/7, HF2, DEM4, AF4) Display appropriate prompts even if patient would normally be excluded for recent diagnosis or registration Use reference date rather than "today" when evaluating medication-related criteria e.g. ACE within 6 months Do not display approach and particle or dependence approach.	Go to Contract+ Settings Prompts tab.
 Do not display 3rd question on depression screening questionnaire Do not display information about 3rd question on depression screening questionnaire (useful for self-completion) Show prompt to collect smoking status for Smoking 7 when patient is aged 14 Show prompts for 15-month checks in Jan, Feb & Mar if in numerator for this year but not next year Advise about flu jabs in upcoming season Show prompts for concisil exceeding if a "season" of the patient extension within the last 4 modes Do not display clinically appropriate prompts and status that have been retired from QOF having appeared in previous years 	Check the option 'Display clinically appropriate prompts and status that have been retired from QOF having appeared in previous years'.
Order of promptor Intervention OK Cancel	The current list of indicators is: chd003, stia004, stia005, dm004, dm005, dm006, dm009, thy001, thy002, cvdpp002, pad003, ld002,
Prompts - Nisar Birdi Image: Content of the second degree of the second	<u>copauu4</u>
 Smoking status required ACE & aspirin/dopidogrel/warfarin & BB & statin medication required 	is withdrawn
 Aspirin or anti-platelet or anti-coagulant medication required Cholesterol reading required (optional) This indicator is withdrawn from QOF and completion is optional (CHD003) Target = 5.0 mmol/l or less No cholesterol reading recorded in notes Total cholesterol reading must be within 12 months of reference date Indicators Coding Exceptions 	be shown with a yellow gle and the text 'This ithdrawn from QOF on is optional' .

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

Actual %	Target %	Points	value	Remaining	
		106.00/6	52@£10,460/£99,	216 520.00/£88,755	j
0.605%	3.378%	4.00/62	£634/£9,826	58.00/£9,193	
0.000%	D.7	100/00	10,£4,596	25.00/£4,596	
0.672%	1.7 Value £1	14/£1,760	3.7/£3,487	20.00/£3,170	
0.756%	13 Remain	ing 58.00/£1,0	546 991/£4,121	20.00/£3,170	
0.303%	75.00/-	6.00/80	52/£14,106	83.00/£13,155	
	Actual % 0.605% 0.000% 0.672% 0.756% 0.303%	Actual % Target % 0.605% 3.378% 0.000% 0.7 Prevaler 0.672% 1.7 Value £1 0.756% 3. Remain 0.303% 3.758%	Actual % Farget % Points 106.00/6 106.00/6 0.605% 3.378% 4.00/62 0.000% 7.756% 1.7 Prevalence: 0.756% 3.8 Remaining 58.00/£1, 0.303%	Actual % Target % Points Value 106.00/62/£10,460/£99, 106.00/62/£10,460/£99, 106.00/62/£10,460/£99, 0.605% 3.378% 4.00/62 £634/£9,826 0.000% 7.700 10 £4,596 0.672% .7 Value £114/£1,760 3 7/£3,487 0.756% .3 Remaining 58.00/£1,646 9 1/£4,121 0.303% .3769/ £.00/80 £.01/£14,106	Actual % Target % Points Value Remaining 106.00/62/£10,460/£99,216 520.00/£88,755 0.605% 3.378% 4.00/62 £634/£9,826 58.00/£9,193 0.000% 1.74% 10 £4,596 25.00/£4,596 0.672% .74% 10 £4,596 25.00/£3,170 0.756% .3 Remaining 58.00/£1,646 91/£4,121 20.00/£3,170 0.303% .7694 £0.099 £631/£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

BMJ Contract F	Patients	Tools																		
Profile Today	•	Display Targets	Cue Card	Details	Notes	Scheck	Email Data	Data	Send	Indicator Report	Register Report	Data Report	Selecte Repor] ed t						
Selection		Filter			Pati	ent			Message		Export		Print							
Contract Pat	ients - /	Atrial Fi	ibrillat	ion (3	2 pat	ients)														
CHD HF Stroke	BP	DM COPD	Epi	Thyroid (Cancer	PC M	H As	sth De	m Dep	CKD	AF Obe	sity LD	Smok	CS	PP	SH	Osteo	PAD	RA	Rec
First Name	Last Name	D	ate of Bi	th Pr	eferred (GP Practi	ce Num	ber Calc	CHADS2	Rec.CH	HADS2	Target	CHA	DS2	CHAD)S2=2+				
Eylis	Appleyard	1	3 Aug 19	67 AS	3	20600	09	0				0/0	_		-					
Melsadia	Battle	2	Mar 195	9 Sł	1	20600	02	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 Visulisations tab



Heart Age

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

Introduce Range Checks for Health Checks Templates

Height Enter a value	Physical Activity Enter a value
Weight Enter BMI Enter BMI Enter BMO BMO BMI Enter BMO BMO BMO BMO BMO BMO BMO BMO	mmHg) I on 30/12/1899 pected to be between 30 and 300, and ed to be within 20 and 300
400/100 mmHg	Enter a value

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

Appointment	Filters				Trates		2
Clinicians Reasons	Advar	nced Clinician Assigned Re	Statuses	Types Availa	Clinics ble Resources	Specials	Locations Advanced
Show appointm	ents for v	which all of the se	lected resource	Av es are available.	ailable I	Resour	ces 💽
Category		Resource	e Do	escription			Code
Equipment		ECG Mad	hine E	CG Machine			ECG
					Se	<u>O</u> K	Select <u>A</u> ll

Types Clinics

Assianed Resources

✓ Thursday
 ✓ Friday
 ✓ Saturday

Select all appointments

Select all appointments

Select all appointments

Select all appointments

Limit duration to minimum length of 10

Limit duration to maximum length of 20

Include consecutive available appointments

Monday Tuesday Available Resources

Advanced Clinician Statuses Types C

Repointment Filters

Reasons

Emergency status:

Notes Pulled status:

Weekday:

Appointm

Booked By

Clinicians Advanced Clinician Statuses

Accelerator Details

Locations

Emergency status:

Notes Pulled status:

Comment contains:

Appointments Online status:

Weekdays:

Booked By:

Accelerator Clinicians

Assigned Resources

Select all appointments

Select all appointments

Reasons

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

? ×

2

Advanced

Advanced 🥋

Advanced

Advanced 🥋

Available Resources

Sunday

Select None Select All

🍦 minutes

🚔 minutes

Accelerator Deta	ils		_		Take	_	₹ <mark>₹</mark>
Accelerator	Clinicians	Advanced Clini	cian Stat	uses	Types	Clinics	Specials
Locations	Reasons	Assigned	Resources	Ava	ailable Resour	ces	Advanced
Show appointment	s for which all o	f the selected reso	ources are availa	Avail ^{ble.}	able Re	esour	ces 💽
Show appointment	s for which all o R	f the selected reso lesource	Durces are availar Description	Avail ^{Ible.}	able Re	esour	Ces Code

FrontDesk Report – Grade & Language

5	Appointment History	1	- 0			? X
	Reasons Assigned Resources	Available R	lesources	Adv	anced	Patient
	Report Clinicians Advanced Clinicia	n Statuses	Types	Clinics	Specials	Locations
	Setting these filters will further limit the list of a	Adva dinicians selected of	nced C	Clinicia ns tab.	in Deta	ils 🌺
	<u>G</u> ender: ▼					
	Grade: No filter		•			
	Language: Hungarian No filter					
	Clinician Type					
	Doctor Consultant					
	Registrar					
	Nurse Prescribion Nurse					
	V Locum					
	Health Care Assistant Other Health Professional					
	Phlebotomist					
				Selec	t <u>N</u> one	Select <u>A</u> ll
	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



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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.

ł	listory			Patient A	udit		. M	lessages	
Appointment	Clinician	Resources	Other	Audit	Patient	Information	Alerts	Options	Access
						Appoi	intmer	nt Detai	s 😽
Patient:		Mrs Katie Grac	e (KT 18 7TC	2)					
Scheduled start:		16:40 Thursda	y 19 Februa	ary 2015 (Dr	Bruce Dickins	Change Time			
Status:		Scheduled			Ŧ	Print Slip			
Duration:		10				Print			
Embargo:		Not embargoed	1		- Em	bargo is in <u>v</u> iolat	e		
Web booking pos	sible until:	Not bookable o	ver the web)	- 🗸 🗸	ply embargo to <i>i</i>	Appointmen	ts Online	
<u>Type</u> :		Consultation			▼ Su	ppress appointm	ient type co	Infirmation	
Location:		Main Surgery			▼ R	teply D	etails		
Clinic:		Not a clinic			•				
Special:		Not a special			-				
Slot Comment:									
Reason:		No reason supp	blied		-				
Somment:		No reason supp	blied						* (R)
		Minor Surgery							• 0

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	Туре	Special	Reason	
11:50 AM		Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC			
12:00 PN	1	Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC			
12:10 PM	1	Telephone Consultation: EMBARGOED: Release tomorrow:		10 mins	TelC			
12:20 PN	1	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		IWEB1:		10 mins				

FrontDesk Appointment Reasons

A new column is visible in the **Appointments** Book

FrontDesk - Resource Details

Deservers Details	2 X	
Resource Details		FrontDesk Resource Details
Resources are attributes that ca are intended to show any requir particular room, or the presence external/non-practice staff such Category:	Resource $\overline{\mathbb{C}}$ an be optionally attached to any appointment. They ements for the appointment, such as equipment, a of a person with a specific skill – usually as an interpreter.	Resources for use in the pro allocated to an appointmer defined in Practice Details
Name: Room Extern Code: ECG Desc Resource Details Lead Resource	al person	Each resource must be ente there are 3 Blood Pressure BP3).
ead Resources are attributed to show particular room, or the external/non-practice	Resource $\overline{[i]}$ utes that can be optionally attached to any appointment. They any requirements for the appointment, such as equipment, a the presence of a person with a specific skill – usually e staff such as an interpreter.	There are four types of resc External person and Other.
Category:	Equipment	To set up a new resource: C
<u>N</u> ame:	ECG Machine	from the drop down list - G
<u>C</u> ode:	ECG	description - Define 'Lead in
Description:	ECG Machine	appropriate (i.e. time when
Lead in time (min):	5	due to cleaning / transport
Lead out time (min):	5	
Restrictions:	Prevent overlapping resource use Prevent overlapping resource use Alow all users to book overlapping use Alow specified users to book overlapping use Cancel	

se in the practice can be defined and appointment or a slot. Resources are tice Details | Resources. nust be entered separately (for example if od Pressure Monitors then enter BP1, BP2,

types of resource: Equipment, Room, and Other.

resource: Click 'New' - Select a category lown list - Give the resource a code and a efine 'Lead in / Lead out ' times if e. time when the resource is not available / 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.

Warning	x
	ECG Machine is not available for this slot. It has already been reserved for use in the following appointment(s): Nurse Mary, 15:00 Thu 19 Feb 2015
	ОК

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.



FrontDesk - Further location details

History			Patient Audit				Messages		
Appointment	Clinician	Resources	Other	Audit	Patient	Information	Alerts	Options	Acces
							Othe	r Detai	ls 🕸
Consulting dinici	an:							T	
Date booked:		Friday 10 April	2015 13:10	0:02 by Prac	tice Manager				ccess
Booking override	2:								
Date last update	ed:	Friday 10 April	2015 13:11	L:44 by Prac	tice Manager				
Date comment la	ast updated:								Not Joint
Joint appointme	nts:								
Patient <u>a</u> rrival ti	me:								
Consultation sta	rt time:				Ap	pointment is an g	mergency		
Actual duration:					No	tes have been pu	lled		
Einished time:					E Be	minder has been	issued to pa	tient	
Call number:									
Other attendee	s:								
	deteiler								
rururer location	uetaiis:	L							Unlock
						Nete		or l	Created

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



2:30 PM		
2:40 PM		
2:50 PM	≣¢>	Asthma Clinic: Mrs Jake Loftus:
3:00 PM		XXX NOT AVAILABLE:
3:10 PM		XXX NOT AVAILABLE:
3:20 PM		
3:30 PM		



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

🞫 28 🏠 🔱 🖻 🗏 🗏	🛃 🕙 💷 🐗	🖓 🐍 💐 🖱	E M 🔮	BMJ	V4.0.4 (In	
BMJ Appointment Bool	Consultations	Tools		1000 (Bart)		
Murse Mary -	8 - S _*	1 👳 👸	8 8		0	
Fri 22 May 2015 🔹	1 2 2 3 1					
\$\$ \$\$ \$\$ \$\$ \$\$ \$\$	🔝 ኞ + 🖴 +	BOOK	Cancel Squi	Visit	Unreg.	
Selection	Filter	Edit 😡	ook Appointing		5	
Appointments - Nurse Mary - SINGL						
NM-SINGLE: Today DOCTORS: Today NURSES: Today OVERVIEW: Today						
Time Where	Description					
4:20 PM						
4:30 PM						

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



Book Recurring Appointments - Book appointments Click on 'Book' to go ahead and book these appointments, or select an appo ent to change it. Required Date/Time Selected Appointment Fri 12 Jun 2015 [17:40] Nurse Mary, Friday 12 June 2015 5:40 PM Fri 03 Jul 2015 [17:40] Nurse Mary, Friday 3 July 2015 5:40 PM Double click to replace the selected appointment with this appointment. Required date/time: Fri 22 May 2015 [17:40] Available appointments Nurse Mary, Thursday 21 May 2015 8:40 AM Nurse Mary, Thursday 21 May 2015 8:50 AM Nurse Mary, Thursday 21 May 2015 9:00 AM Nurse Mary, Thursday 21 May 2015 9:10 AM Nurse Mary, Thursday 21 May 2015 9:20 AM Nurse Mary, Thursday 21 May 2015 9:30 AM Nurse Mary, Thursday 21 May 2015 9:40 AM Nurse Mary, Thursday 21 May 2015 9:50 AM Nurse Mary, Thursday 21 May 2015 10:10 AM Nurse Mary, Thursday 21 May 2015 10:20 AM Nurse Mary, Thursday 21 May 2015 10:30 AM Nurse Mary, Thursday 21 May 2015 10:40 AM Nurse Mary, Thursday 21 May 2015 10:50 AM Back Finish Cancel 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

III System Settings	S ×
Settings Security Col ur Schemes Active List Message Templates Scheduled Me	ssages Labels Full Backup
s <u>i</u>	ystem Settings ↓{{
Settings	
Debug level:	None 🔻
Number of days to store Instant Messages and System Messages:	30 💌
Transport mechanism for Instant Messages:	Network 🔹
Read code to add when recording instant messages to patient notes:	9NZ
Send error report emails to this address:	
Remote support tool:	Primary -
Preferred GP to refer to (changes applied at next synchronisation):	Usual GP 👻
Generate audit trail entries with these importances:	essages 🔹
🚍 Senat send païtert nome in paris instantemenoge	
Participating in ECASS Trial (NOTE: Only enable under supervision from the ECASS	trial team
	OK Cancel

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 Re	eport			<u>२</u> ×
			ECASS T	rial Report 🍏
This report will s Risk Calculator o	how the det	ails of all instances tified period.	of the use of the Macmillan C	Desophagogastric Cancer
Start date:	01 A	oril 2015		
End date:	13 A	pril 2015		
Don't print <u>h</u> ea	der informati	on	ſ	Run Cancel

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

Document Control				
Status	Full			
Author(s)	Sue Turner			
Document Version	1.0			
Date	July 2015			