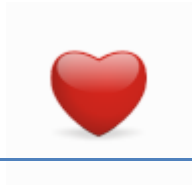


# CHD Recall Wizard for Vision 3



Designed and written by Bradley Sieve - September 2011 © Copyright Protected

## Overview

The idea of this process is to simplify the CHD recall procedure within Vision and also to reduce the need to view data within a patient record, as the search criteria should provide enough information to be able to determine those patients that need recalling.

There are only two searches to run in Vision, and when exported all the data is automatically collated by our CHD Recall Wizard program and presented in Microsoft Excel.

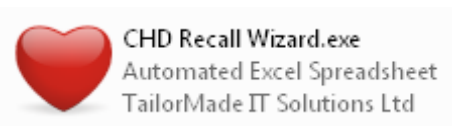
Once the required recall list of patients have been filtered in Excel, our CHD Recall Wizard will automatically create a patient workgroup back into Vision. Whereby the Vision mail merge program is used to produce the letters and forward any recalls in each patient record.

The beauty of this process is that no patient should ever be missed from receiving a recall and it will highlight mistakes in data entry.

After using this program if you wish to add recommendations to enhance it further, please do not hesitate to contact: [bradley@tailormadeit.co.uk](mailto:bradley@tailormadeit.co.uk)

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## Quick Overview of Recall Procedure



1. Run two searches in Vision
2. Run CHD Recall Wizard to produce data in Microsoft Excel
3. Filter data in Microsoft Excel to define recall group
4. Create Patient Group in Vision using CHD Recalls toolbar
5. Use Group Recall screen in Vision to send out the invite letters and add next recall into each patient record.

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## About Microsoft Excel

There is no setting up required within Microsoft Excel, as the Vision search exports text files, which can be opened within Excel in the normal way. There are no special drivers required or installation of Microsoft Query.

Vision Data is linked together using a variety of formulas, which is automatically done when you use our CHD Recall Wizard program, to give you a complete single spreadsheet.

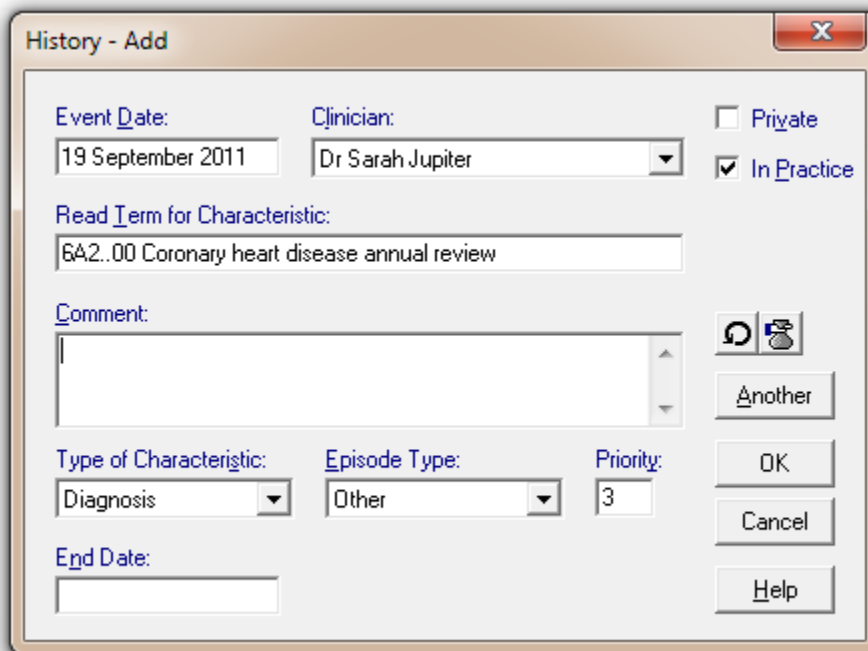
The CHD Recall Wizard currently only works with Microsoft Excel 2003 or earlier.

## Vision Program Requirements

It is expected that at least one item of data is recorded for each searched entity with regards to Medical History, Recall, Cholesterol, BP and Smoking Status.

If no patients have at least one of these entities the wizard will not run. If this is the case then please add the missing entity into a single patient record to resolve the problem and then educate your clinical team to record data using these specific entities.

*CHD Review or Annual Review is recorded in the medical history entity*

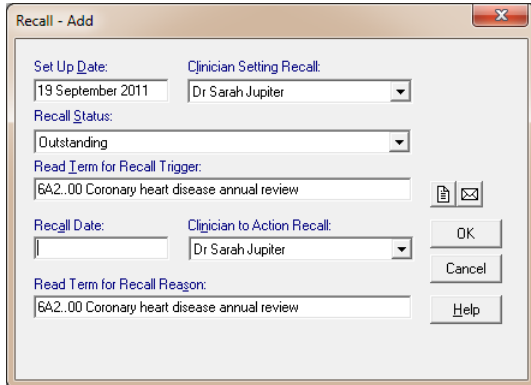


The screenshot shows a dialog box titled "History - Add". It contains the following fields and controls:

- Event Date:** A text box containing "19 September 2011".
- Clinician:** A dropdown menu showing "Dr Sarah Jupiter".
- Private:** An unchecked checkbox.
- In Practice:** A checked checkbox.
- Read Term for Characteristic:** A text box containing "I6A2..00 Coronary heart disease annual review".
- Comment:** A large empty text area.
- Type of Characteristic:** A dropdown menu showing "Diagnosis".
- Episode Type:** A dropdown menu showing "Other".
- Priority:** A text box containing "3".
- End Date:** An empty text box.
- Buttons:** "Another", "OK", "Cancel", and "Help".

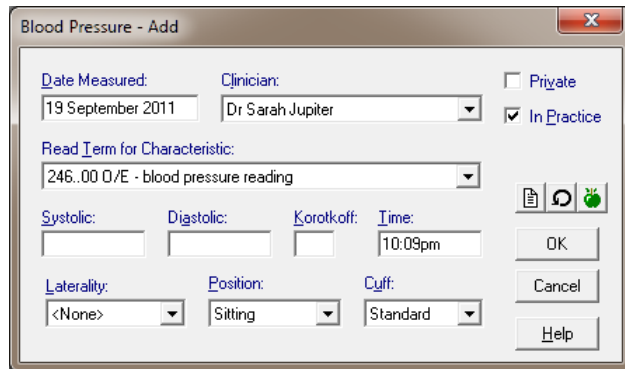
The wizard also searches for QOF CHD diagnosis, exceptions and refuses monitoring Read codes if they exist and have been recorded in a medical history entity

### CHD Recall entity



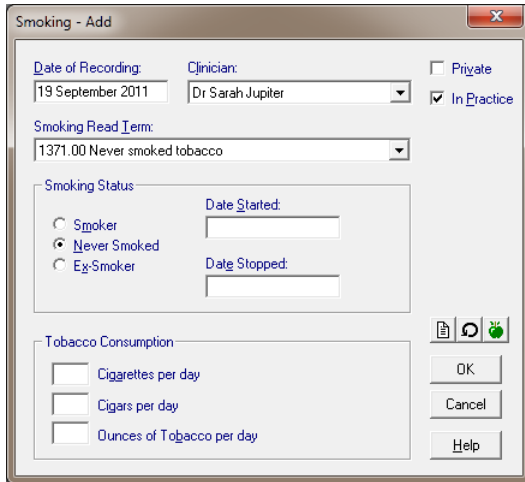
Recall - Add dialog box. Fields include: Set Up Date (19 September 2011), Clinician Setting Recall (Dr Sarah Jupiter), Recall Status (Outstanding), Read Term for Recall Trigger (6A2.00 Coronary heart disease annual review), Recall Date, Clinician to Action Recall (Dr Sarah Jupiter), Read Term for Recall Reason (6A2.00 Coronary heart disease annual review). Buttons: OK, Cancel, Help.

### Blood Pressure entity



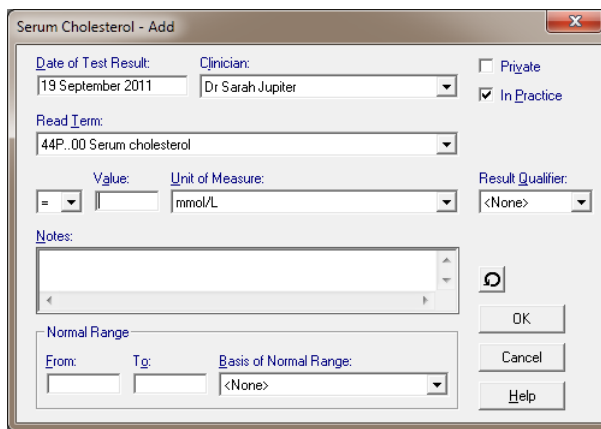
Blood Pressure - Add dialog box. Fields include: Date Measured (19 September 2011), Clinician (Dr Sarah Jupiter), Private (unchecked), In Practice (checked), Read Term for Characteristic (246.00 O/E - blood pressure reading), Systolic, Diastolic, Korotkoff, Time (10:09pm), Laterality (<None>), Position (Sitting), Cuff (Standard). Buttons: OK, Cancel, Help.

### Smoking entity



Smoking - Add dialog box. Fields include: Date of Recording (19 September 2011), Clinician (Dr Sarah Jupiter), Private (unchecked), In Practice (checked), Smoking Read Term (1371.00 Never smoked tobacco), Smoking Status (Never Smoked selected), Date Started, Date Stopped, Tobacco Consumption (Cigarettes per day, Cigars per day, Ounces of Tobacco per day). Buttons: OK, Cancel, Help.

### Serum Cholesterol entity



Serum Cholesterol - Add dialog box. Fields include: Date of Test Result (19 September 2011), Clinician (Dr Sarah Jupiter), Private (unchecked), In Practice (checked), Read Term (44P.00 Serum cholesterol), Value (=), Unit of Measure (mmol/L), Result Qualifier (<None>), Notes, Normal Range (From, To, Basis of Normal Range). Buttons: OK, Cancel, Help.

Should you wish to add additional elements to this for your particular surgery, please contact us.

## Building the Vision Searches

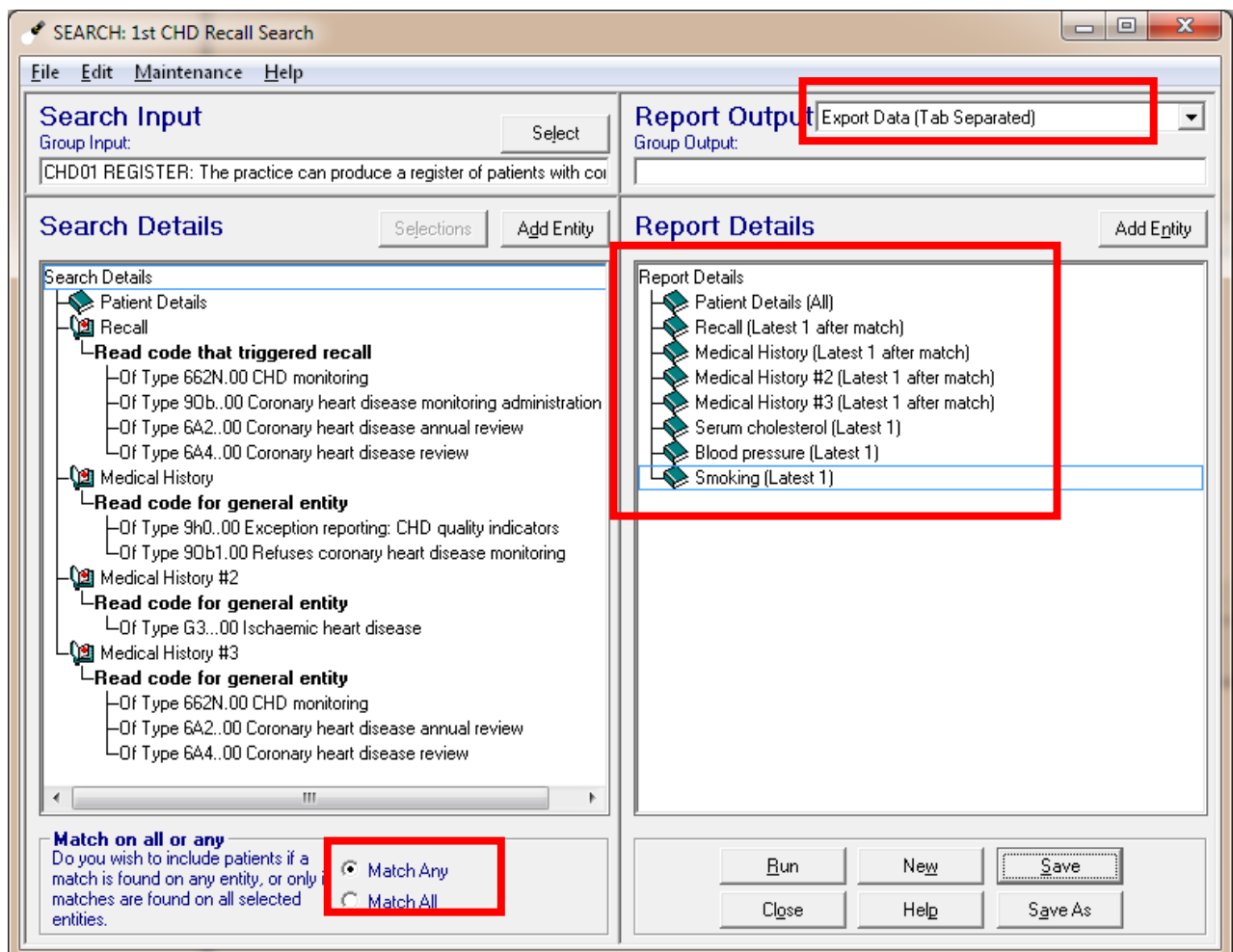
### Vision Search One

The main purpose of this search is to extract all necessary information to help determine when a patient should be recalled and when the last review was carried out.

This first search is designed to extract the following:

- All Registered CHD patients
- The last CHD recall ever recorded
- The last CHD review ever recorded
- The last CHD diagnosis ever recorded
- The last recorded CHD QOF exception or refuses CHD monitoring
- The last Serum Cholesterol, BP and Smoking Status

Build the search exactly as shown in the image below:



Please pay particular notice to the highlighted sections in the image above:

- Reports Details are all setup to only export the last record
- Select the “Match Any” option
- Select “Export Data (Tab Separated)”



## Vision Search Two

The main purpose of this search is to find every registered patient on the CHD register.

This patient list will overwrite the previous patient list from the first search, providing a complete patient list size so that no patient is left out.

Once in Excel if any patient has no CHD data or Recall data recorded from the first search this will be highlighted by an #N/A statement.

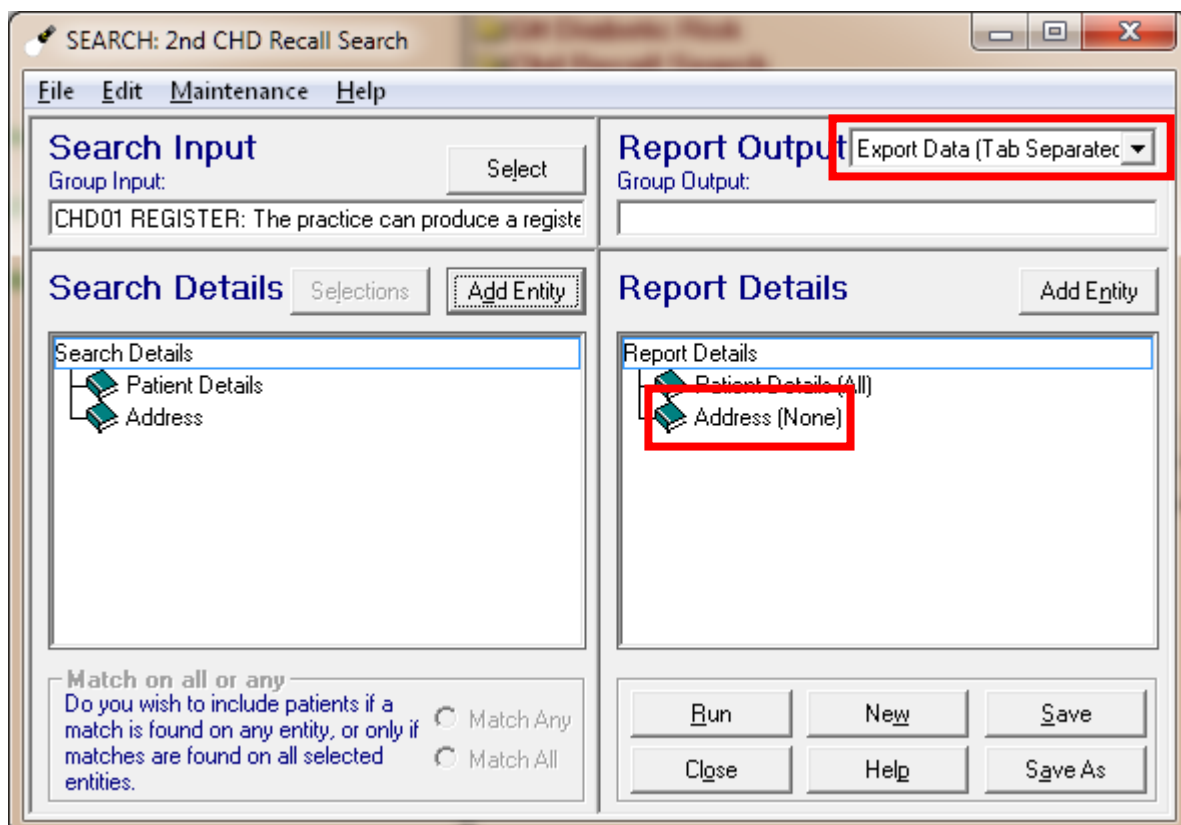
This makes it impossible to miss any eligible patients from receiving a CHD recall reminder or determining when (if any) the last CHD review was recorded for the patient.

This search currently extracts any of the following:

- Registered CHD patients

**Note:** The address entity has been added because we are using an audit, which would normally export all the found audit data; by adding the address entity this stops all the clinical data from being exported, as it is not required. We only want the complete list of CHD patients.

Build the search exactly as shown in the image below:



Please pay particular notice to the highlighted sections in the image above:

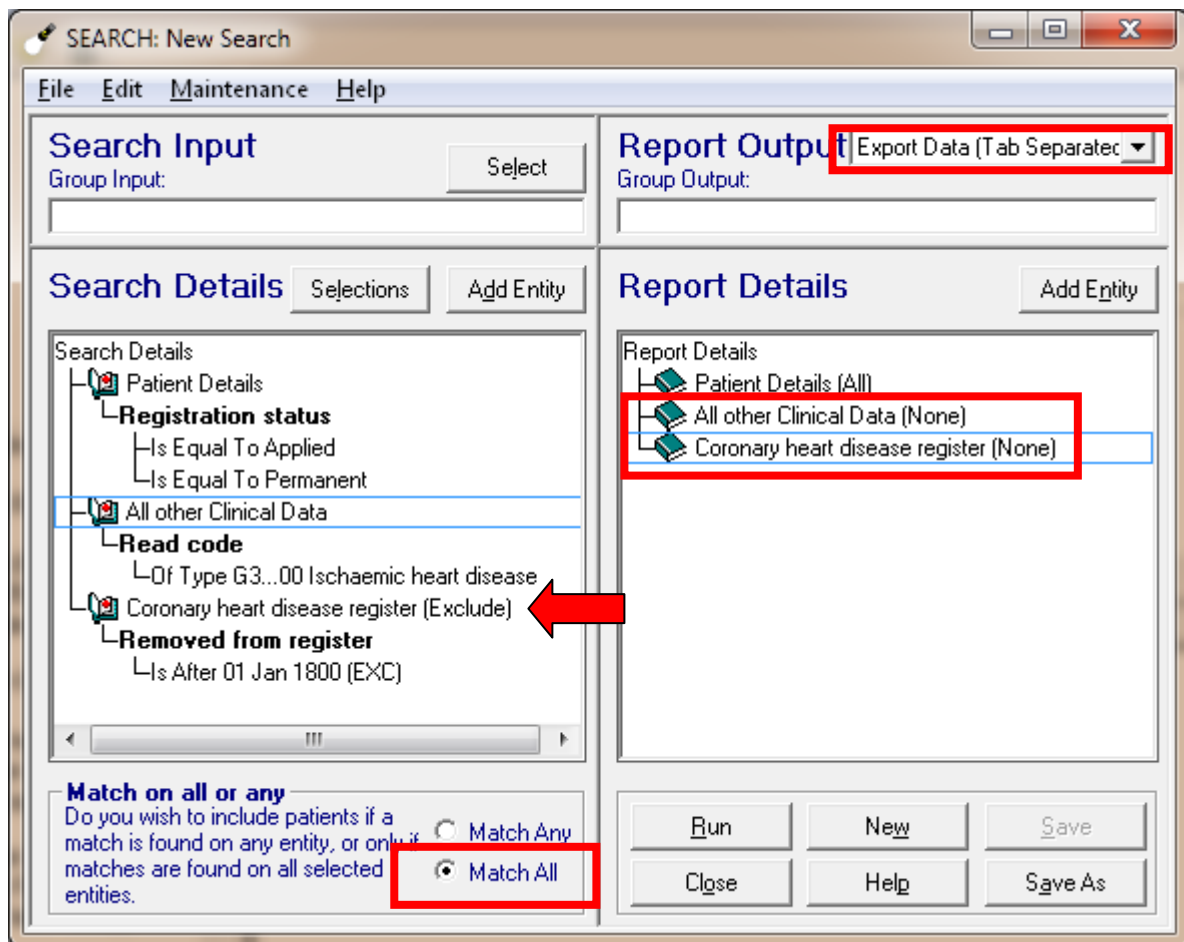
- Address Report Details is set to NONE
- Select "Export Data (Tab Separated)"

## Alternative 2<sup>nd</sup> Search

If you used the 1st alternative search you will want to use this version.

This search currently extracts any of the following:

- Registered patients
- With a CHD Read code in any clinical area
- Exclude any patients with a removed from date in the CHD register

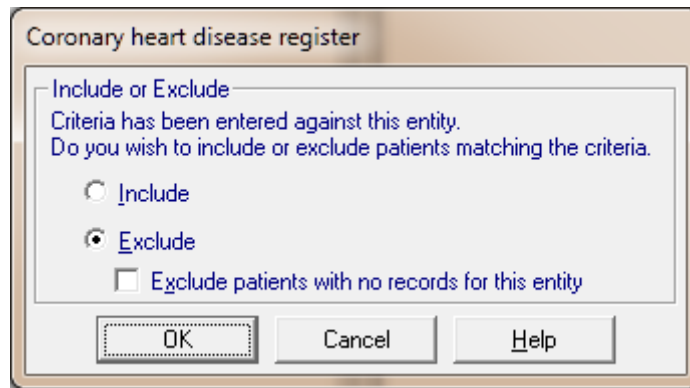


Please pay particular notice to the highlighted sections in the image above:

- Report Details is set to NONE
- Select the “Match All” option
- Select “Export Data (Tab Separated)”
- CHD Register is set to EXCLUDE

## Amending Search Details to EXCLUDE

1. Highlight “CHD Register” entity in the left window area
2. Right mouse click on the CHD Register entity in the left window area
3. Select Options...
4. Click the Exclude option as shown in the image below.

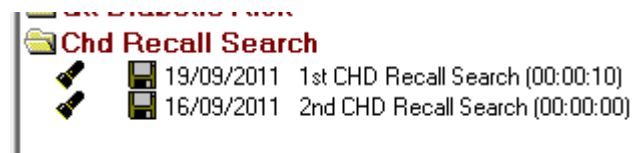


## Create a Batch folder to run Searches

As nothing will ever needs changing in any of these searches, once you have saved them they should be moved into a Batch folder. This will make it easier to run the searches each month, as you will not be presented with overwrite screen prompts and folder location prompts when the searches are run.

1. Press F7 on your keyboard or click the Batch folder icon in the top toolbar
2. Name this folder something relevant like: CHD Recall Search
3. Now drag the 1<sup>st</sup> search onto the yellow batch folder you just created
4. Now drag the 2<sup>nd</sup> search onto the yellow batch folder you just created

**It is absolutely imperative that these searches are placed in the correct order within the batch folder** as shown below:



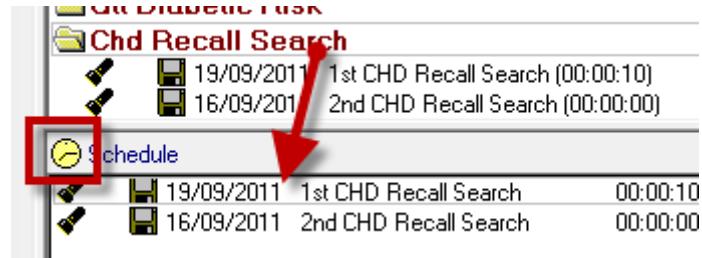
If you need to amend the order you will have to right mouse click on the search in the batch folder and select remove, then drag the search over to the batch folder again.

Tip: if you drop the search on the batch folder it will always go to the end of the list. If you drop the search on to an existing search in the list it will appear above it.

## Run CHD Recall Searches

Now that you have created the searches and put them into a batch folder, all you need do to extract the very latest data is:

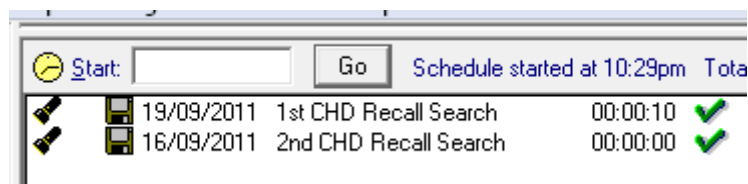
1. Drag the batch folder into the scheduler area (as shown in the image below)



2. This will display the searches in the schedule area
3. Now click the Schedule Clock or press F5 on your keyboard
4. Then either enter a time for the searches to run or just click the Go button to run it immediately.

Note: When entering the time value; it must be in hours and minutes, divided by a colon i.e. 12:00

5. When the searches have completed there will be a green tick shown at the end of the search description (as shown in the image below).

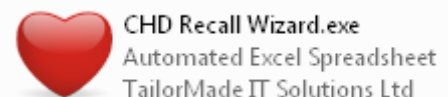


6. You may now close the Search & Reports module, and continue with the CHD Recall Wizard

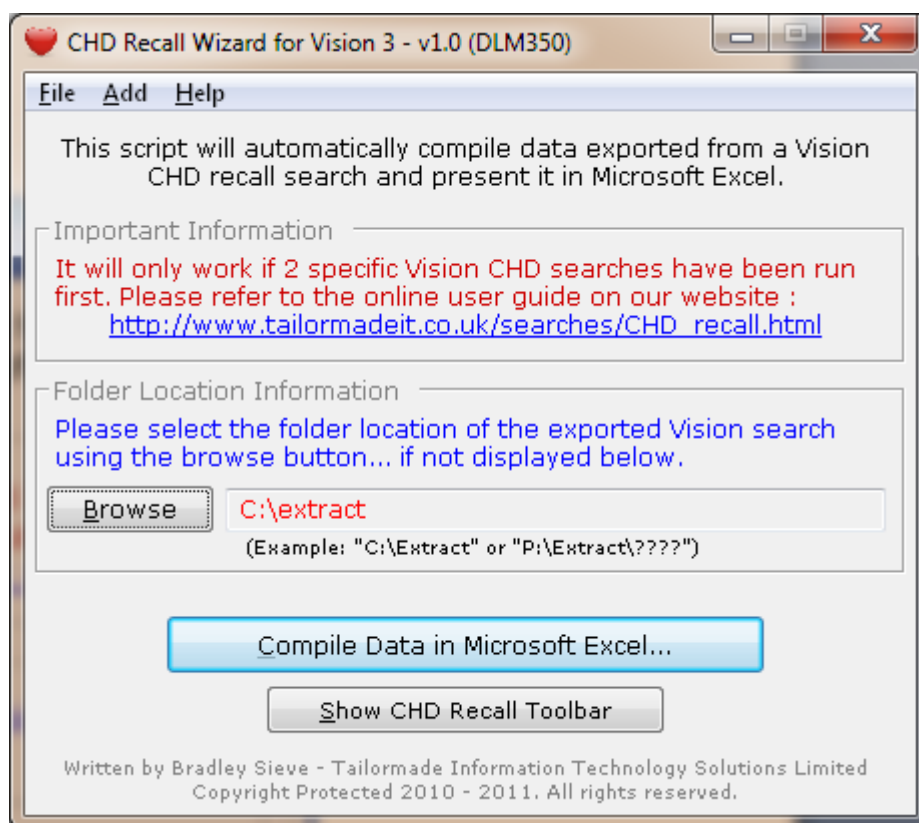
## Using the CHD Recall Wizard

This wizard uses Microsoft Excel 2003 to import the Vision export data.

1. Double-click on the CHD Recall Wizard executable file
2. When initially opened you will need to select the Vision export folder, by clicking on the Browse button



If your practice maintains its own server, this will be C:\Extract as Vision searches always export by default to this location. However, if you are on a hosted solution, this will be P:\Extract\*<your login username>*



3. Once the folder location has been selected, click Compile Data in Microsoft Excel

The program should now open Excel and automatically compile all the Vision search data.

If you inadvertently close the CHD Recall Wizard, or wish to use existing data within the Microsoft Excel spreadsheet at another time, click on “Show CHD Recall Toolbar” button to create additional patient groups and mail merge data in Vision.

## Microsoft Excel Columns

A brief description of each column shown in the compiled spreadsheet:

**PAT\_ID** = Vision Identifier fro the patient  
**SURNAME** = Patients surname  
**FORENAME1** = Patients first forename  
**DOB** = Patients date of birth  
**ACCEPT** = When patient joined the practice  
**LAST\_RECALL** = Last recorded recall  
**RECALL\_DATE** = Date of last recorded recall  
**MOB** = Month of birth for recall alternative  
**MONTH** = Recall month taken from recall date  
**YEAR** = Recall year taken from recall date  
**ANNUAL\_REVIEW** = Last annual review & Date

**MONITOR** = Last CHD monitoring & date  
**DIAGNOSIS** = Last CHD diagnosis & date  
**MONITORING** = Last CHD consultation & date  
**QOF\_EXCEPTION** = Last QOF exception & date  
**REFUSE\_CHD\_MON** = Last CHD refusal & date  
**CHOLESTEROL** = Last recorded value & date  
**BP\_SYS** = Last recorded value & date  
**BP\_DIA** = Last recorded value & date  
**SMOKING\_STATUS** = Last recorded & date

## Microsoft Excel Coloured Values

Certain values in the spreadsheet under particular columns may be highlighted in a colour so as to bring a specific point to your attention, these are:

- RECALL\_DATE = red if date is more than 365 days - from today
- ANNUAL\_REVIEW = red if date is more than 365 days - from today
- MONITORING = red if date is more than 365 days - from today
- MOB stands for: Month of Birth
- If the Recall Date is before today the MONTH and YEAR column numbers will turn red.

If a cholesterol value is:

- ➔ between 5 and 6.4 the background cell will turn yellow
- ➔ between 6.5 and 7.8 the background cell will turn orange
- ➔ greater than 7.8 the background cell will turn red

If a Systolic BP value is:

- ➔ less than 90 the background cell will turn yellow with red text
- ➔ between 140 and 159 the background cell will turn orange
- ➔ greater than 160 the background cell will turn red

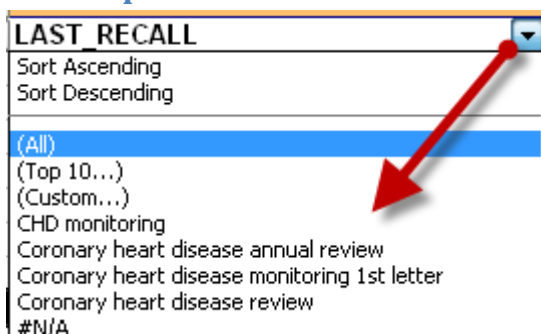
If a Diastolic BP value is:

- ➔ less than 60 the background cell will turn yellow with red text
- ➔ between 90 and 99 the background cell will turn orange
- ➔ greater than 100 the background cell will turn red

## Using Microsoft Excel Filters

Now that you have all the compiled Vision data in the Microsoft Excel spreadsheet, use the auto filters in the top cells of each column to select the actual patients you wish to recall.

### Select Specific Value



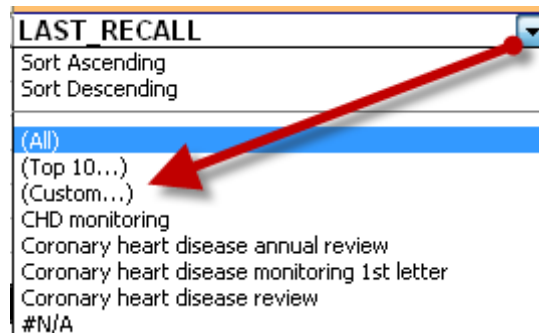
Initially clicking the Filter will present a consolidated list of unique values found within that specific column. In the example below, there are only 2 types of text entry found in that column for the hundreds of patients that maybe in the spreadsheet.

If you select an item from the list, it will only show rows of patients that have that unique value.

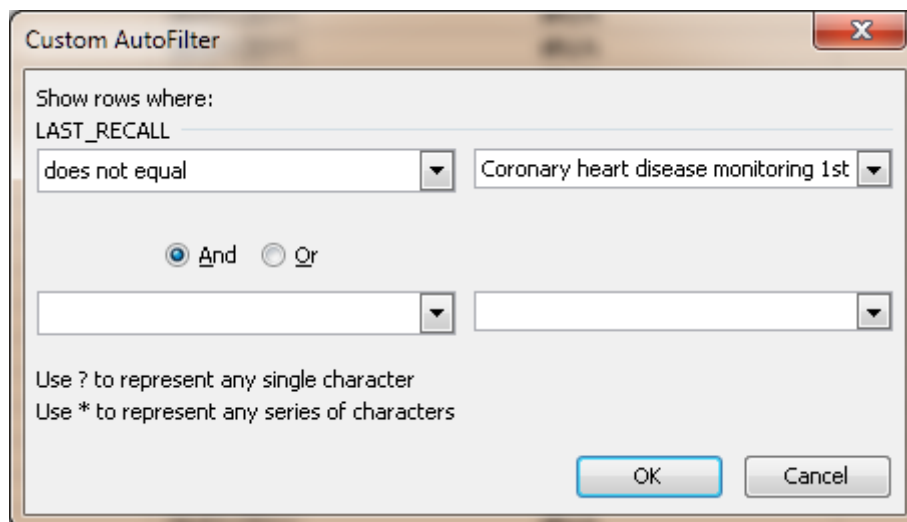
You may use as many filters as you wish in a spreadsheet until you arrive at the correct set of patients that you want to send a particular type of recall letter.

## Exclude a Value

If you need to exclude specific entries in a column, use the Custom option in the drop down filter



Then select “does not equal” from the first drop down list; then the required value to exclude from the adjacent list (as shown in the image below).



## Custom Filter

This custom filter allows you to use up to two filters at one time, be sure to remember whether you what to use the AND/Or option when using the second filter.

It allows you to filter data using the following attributes:

- equals
- does not equal
- is greater than
- is greater than or equal to
- is less than
- is less than or equal to
- begins with
- does not begin with
- ends with
- does not end with
- contains
- does not contain

## Popular Filter Selections

### Patients with no recall

H
LAST_RECALL
#N/A
#N/A

Filter the #N/A value from the LAST\_RECALL column.

This would mean that no CHD recall has ever be recorded in the patient record.

### Patients with no CHD result

Filter the #N/A value from the ANNUAL\_REVIEW column.

This would mean that no CHD annual review has ever be recorded in the patient record.

### Patient requiring first invite letter

- YEAR = This current year
- MONTH = The month you wish to send out the invite in the chosen year
- LAST\_RECALL = This can be achieved in a variety of ways and depends on the data shown in the list, for example:

You will have a variety of read codes to choose from for the first invite letter, as these will be all the different types of results that have been recorded.

- If there are more than two types of selectable item in the filter list that are needed to make up the patient group in Vision; you could select each individual type from the filter list and create the group in Vision one after the other, building up the actual patient group in Vision, i.e. first select “CHD annual review” and click the All PAT\_IDS button on the CHD Recalls toolbar. This would add the first group of patients into Vision. Then change the filter selection to “CHD monitoring” and repeat the process, and so on... to build up the actual invite group
- If there are only two types of selectable item in the filter list; you could use the Custom filter as shown below... (note the OR option has been selected)

Custom AutoFilter

Show rows where:

LAST\_RECALL

equals [dropdown] Coronary heart disease monitoring 1st [dropdown]

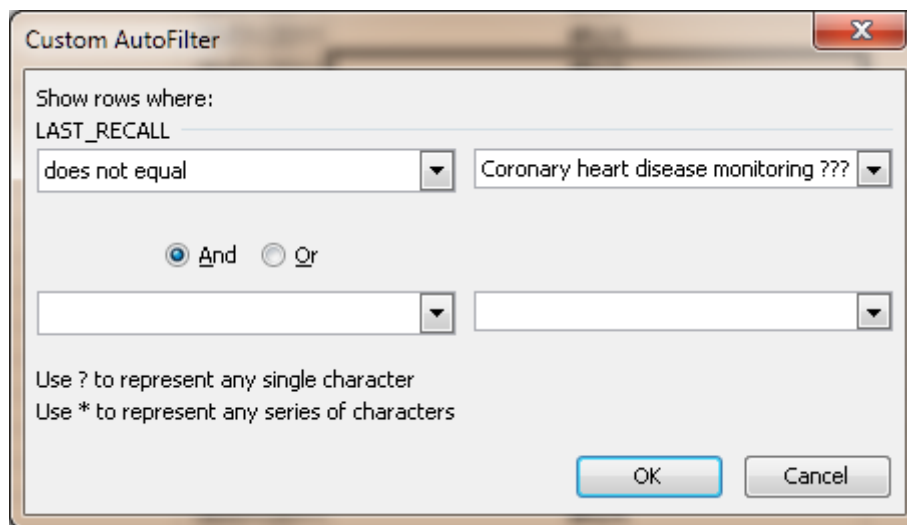
And  Or

equals [dropdown] #N/A| [dropdown]

Use ? to represent any single character  
Use \* to represent any series of characters

OK Cancel

- Another alternative could be to exclude multiple items if they have some sort of continuity within the shown values. Let's say you wish to exclude those that you have already been sent an invite letter. You could use:
  - o Custom filter
  - o Select "does not equal"
  - o Select "CHD monitoring 1st letter"
  - o Then replace the text "1<sup>st</sup> " with ??? (as shown in the image below)  
This will exclude CHD monitoring 1<sup>st</sup>, 2<sup>nd</sup> and 3<sup>rd</sup> letters



After filtering out the various fields to leave you final recall group, you should take a quick look across the remaining columns to check if further filtering is required, for patients that shouldn't currently be sent out a recall letter, due to exceptions.

### Patient requiring first recall

- YEAR = This current year
- MONTH = The month you wish to send out the first invite in the chosen year
- LAST\_RECALL = As shown in the examples above

After filtering out the various fields to leave you final recall group, you should take a quick look across the remaining columns to check if further filtering is required, for patients that shouldn't currently be sent out a recall letter, due to exceptions.

### Patient requiring second invite letter

- YEAR = This current year
- MONTH = The month you wish to send out the invite in the chosen year
- LAST\_RECALL = CHD monitoring 2nd letter

## Patient requiring third invite letter

- YEAR = This current year
- MONTH = The month you wish to send out the invite in the chosen year
- LAST\_RECALL = CHD monitoring 3rd letter

## Patient requiring defaulter letter

- YEAR = This current year
- MONTH = The month you wish to send out the invite in the chosen year
- LAST\_RECALL = Excepted from CHD quality indicators: informed dissent

## Creating the CHD Recall Group in Vision

Once you have determined the list of patients in Microsoft Excel using the filters you can now create the patient group in Vision in two ways, by either:

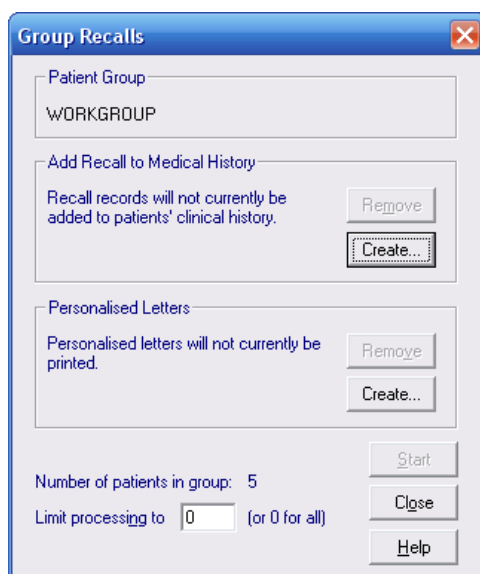
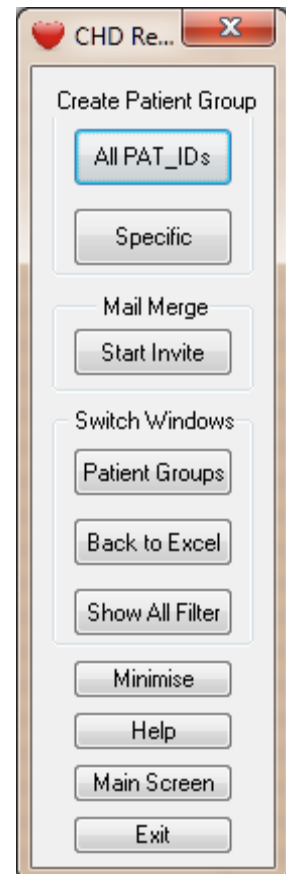
1. Selecting all the patients in your filtered spreadsheet list, using the **All PAT\_IDs** button
2. Hold down the Ctrl key on your keyboard and individually highlight each PAT\_ID in the first Excel column, then use the **Specific** button

Either option above will automatically create a patient group in Vision.

If you wish to add to the group in Vision, either select the Excel Spreadsheet or press the **Back to Excel** button, and say No to the screen prompt, (in that you do not want to clear the current patient workgroup). Then define your next patient group using the filters in Excel and click either of the Create Patient Group buttons.

## Create a Recall and Invite Letter

Once you have the relevant patients in the Vision Workgroup.



Click the **Start Invite** button under the Mail Merge section on the CHD Recalls toolbar. This will show the Group recalls screen in Vision.

The patient group should always be the **WORKGROUP**. Unless you have saved the group for some reason.

Under the **Add Recall...** section click the **Create...** button. You will then be shown a Recall Options screen.

Select the specific type of recall invite option.

Then enter a recall date period, which will be the amount of time you allow the patient to have the CHD examination, before sending out another invite letter.

This maybe entered with a precise date or use shortcut codes, such as 1m for 1 month or 3m for 3 months, etc...

Then under the **Personalised Letters** section click the **Create...** button, and select the invite letter you wish to send out.

When these sections have been defined, click the **Start** button to add the recall to each patient record and print out the recall letters.

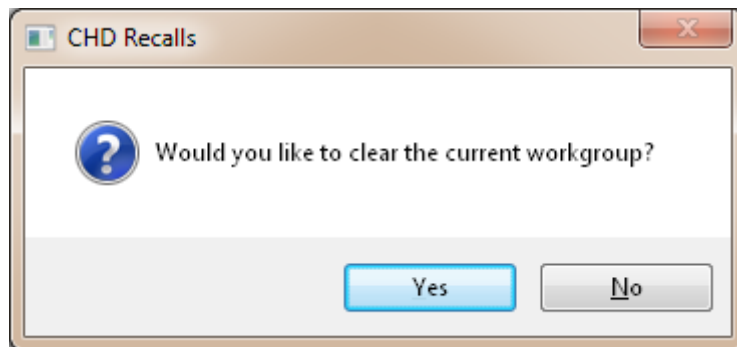
Please note that currently the letter is not recorded in the patient record only the recall (as at the time of writing this document). However in a future Vision DLM update it will be recorded.

Tip: If you also wish to record the invite request as a medical history entry (not just a recall), use the generate history button for the same patient workgroup.



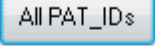



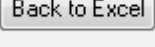
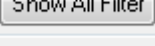
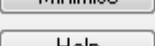
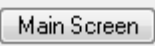
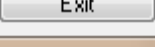

### Next Mail Merge Group

When you have finished with this patient workgroup and now wish to create another mail merge group click the **Back to Excel** button and select Yes to clear the current group.



## CHD Recalls Toolbar

What each of the buttons on the toolbar will do...

Button	Description
	Automatically select all PAT_IDs in the first Excel column and create a patient workgroup in Vision
	Automatically create a patient workgroup in Vision, using only individually highlighted PAT_ID cells in the first Excel column using the Ctrl key
	Open Group Recall screen to perform a mail merge
	Open or switch to Patient Groups module
	Switch back to Excel and ask if you want to clear the current workgroup
	Clear all filters in Microsoft Excel to show all data
	Minimise the CHD Recalls toolbar
	Quick Toolbar Help Guide
	Return to the Main CHD Recall Wizard Screen
	Exit the CHD Recall Wizard program

## CHD Recall Wizard Icon Options

When the CHD Recall Wizard is open an icon will be shown in the notification area (by the system clock). Right mouse click on this icon for further options:

- CHD Recall Toolbar - will display the CHD Recalls toolbar
- Open Extract Folder – will open the selected extract folder you have chosen in the CHD Recall Wizard program in Windows Explorer
- Create Desktop Shortcut – will create a shortcut icon on your desktop for the CHD Recall Wizard
- Setup a different script delay (troubleshooting)
- Last update date and version of the CHD Recall Wizard
- CHD Recall Wizard tested up to DLM Vision version
- Send us an Email or view our website

Alternatively, use the menus in the main screen.

## Troubleshooting

Please note that no other Autohotkey scripts or macro type programs should be running while using the CHD Recall Wizard.

It will detect Keyboard Express & Macro Express programs that are currently running and ask you to terminate these processes, so they do not interfere with this program.

Additionally, some computer processors will run slower than others and cause a delay longer than expected. If you try and run the program immediately after the error message it may run fine, as a certain amount of data will be held in cache memory to help improve performance, or it may at least move further along and produce a different message. This may suggest a low performance processor in which case right mouse click on the icon in the notification area (by the system clock) and select "Set Script Delay", alter the time in here using multiples of 100. The higher the value the slower the script will run i.e. 100 will run faster than 200.

Alternatively, try running the CHD Recall Wizard under a different Windows account on a different workstation as there may be something loaded and running in the background that you may be unaware of.

Try running the CHD Recall Wizard on a different workstation as there may be something loaded and running in the background that you may be unaware of.

This version on the CHD Recall Wizard will only work with Microsoft Excel 2003, NOT 2007.

If Excel fails to start, due to it being installed in a different folder location, open Excel first and then run the CHD Recall Wizard.

## Support

If you need to report any problems with the CHD Recall Wizard after reviewing all the troubleshooting advice, please email [bradley@tailormadeit.co.uk](mailto:bradley@tailormadeit.co.uk) and detail exactly what error message is being displayed or where it fails, to help use determine the problem.

