Vision 3

Online Services - Registration User Guide

Version History

Table of Editions and Contents

Date	Version	Contents	Output
1/8/11	001	Created	docx & pdf
24/08/11	002	What's New added	docx & pdf
19/09/2011	003	Updated with VOSAPP2	docx & pdf
31/10/11	004	Registration Practice and Patient user guides integrated.	docx & pdf
06/11/11	005	Updated following review by ESTU	docx & pdf
05/12/11	006	Updated NHS Mail details	docx & pdf
08/02/12	007	Note added to email details.	docx & pdf
31/05/12	008	Update to Online Registration – username max 15 char.	docx & pdf
22/02/13	009	DLM 440	docx & pdf
12/13	010	December 2013 release	docx & pdf
15/01/14	011	Advice added for setting up multiple accounts - use different email address	docx & pdf
03/14	012	Privacy Policy clarified. Added Privacy Policy and Terms & Conditions topics. Password reminder screens bug fixed.	docx & pdf
02/07/2014	013	estu - Added account activation video to registration topic for web help only.	
08/07/2014	014	estu - Added trail patient support and paste text bug fix	docx & pdf

Contents

VOS Registration

What's New

13 July 2014

- ⭐ **Online Services Trial Support Email Address** - We have added a support email address to the Online Services login screen for patients to use if they experience any issues with the Online Services website. This is a temporary change to enable us to better understand the types of issues that are currently being reported to and dealt with by practice staff. It will also allow us to understand the volume of issues practices deal with and the types of issues that INPS are/are not able to deal with on behalf of the practice. This trial period will start from this weekend and will last for two weeks after which the email address will be removed from the login screen while we assess the results of the trial. Please note our support staff may still direct patients to speak directly to the practices where this is appropriate – for example where the query is regarding any of their patient data on your system. Practice staff should continue to contact the helpline through their normal support channels if they require support for Online Services.

  In Wales, My Health Online (MHOL) patients will continue to use the e-mail support provided by NWIS.

- 🔧 **Bug fix** - The system can now handle and process text pasted into boxes in all of the Online Services screens.

DLM 460

- 🔧 **Bug fix - Patient Confirmation Code** - We have removed potentially ambiguous characters (ie o,O, 0, i, I, l, L) from the automatically generated confirmation code sent to patients for online registration. This will help stop patients inadvertently entering an incorrect code and seeing the invalid confirmation code warning screen.

- 🔄 **Practice ID Change** - *(Online Services only)* If the patient's practice ID changes (as a result of a practice split for example), a message is now displayed with the new practice ID. Patients must take a note of this for use the next time they log in. See *Practice ID Changed* (page 37).

- 🔧 **Bug Fix** - When patient online DNA limit is exceeded this is now visible in Vision Registration under the patient's record. See *Online DNA Limit Exceeded - Online Appointments Access Disabled* (page 25)

March 2014

Registration (Patient)

- **Bug fix - Password Reminder** - We have fixed the problem that prevented patients from accessing the necessary screens when requesting a password reminder.

- **Privacy Policy and Terms & Conditions topics added** - See *Privacy Policy* (page 47) and *Terms & Conditions* (page 50).

- **Privacy Policy Rewording** - The Privacy Policy has been reworded to clarify its content.

January 2014

15 January 2014

Registration (patient)

- **Setting up Multiple Accounts** - The help has been updated to include advice on setting up multiple accounts. It is advised that when setting up more than one account, patients should use a different email address for each account. See *Creating an Online Account* (page 30) and Creating an Account for a Dependant.

December 2013

Registration/Logging In (Patient)

- **Logging In - Practice ID** - Patients now only need to enter their practice ID the first time they log in. The system remembers this, through the use of cookies, for subsequent logins.

DLM 440

(03/2013)

Log In Changes

- **Account Locked Out** - After 5 unsuccessful log in attempts, your account will be temporarily locked for 4 hours. See *Account Temporarily Locked* (page 37).

- **Re-enter email address** - If your email address is not recorded in the system, you will be prompted to re-enter your email address when logging in.

Booking Appointment Changes

- **Clinician Spoken and/or Written Languages** - Now, when booking an appointment, you can see from the list of available appointments, which spoken and/or written language(s) a clinician can communicate in. See Booking an Appointment.

- **Reason for Appointment** - Depending on your practice setup, you may see a 'Reason for Appointment' box in which you can optionally enter the reason for booking your appointment.

- **Repeat Ordering - Freetext Message** - Depending on your practice setup you may be able to add a freetext message, for your practice, to your online repeat order. See Request a Prescription.

DLM 430

(02/2013)

Registration (Patient)

Log In Changes

- **Re-enter email address** - If the patient's email address is not recorded in the system, they will be prompted to re-enter their email address when logging in. However, please be vigilant when updating from the PDS mismatch screen that you do not unintentionally remove email addresses. See *Log In - Re-enter Email Address* (page 44).

DLM 380

19/09/11

Registration (Practice)

Vision Registration Changes

- **Registration - Online Service –** The Online Services tab has been updated, there is an add button for email addresses and mobile numbers.   See *Creating a VOS Online Account* (page 13).

  Note – The mobile number is used for SMS messaging, which is available for English and Scottish practices with NHS Mail.

- **Registration Letter Update –** The registration letter has been updated to include the patients address and the Registration Token expiry date (if set). See *Creating a VOS Online Account* (page 13).

Registration (Patient)

Creating an Online Account Changes

- **Registration Letter Expiration –** Your GP practice can determine how long your registration letter is valid for, the expiry date (if set) is displayed on your registration letter. Once the letter has expired you are prevented from registering and will need to contact the practice for a new letter. See Online Registration.

- **Account Activation –** When sent an activation token, there is now a time period for activation. If you do not activate your account before it expires you will need to get a new registration letter and re-register. See Activating the Account.

Log In Changes

- **Forgotten Username –** There is a link on the log in screen to request a username reminder if required. See *Forgotten Username* (page 34).

- **Forgotten Password –** There is a link on the log in screen to request a username reminder if required. See *Forgotten Password* (page 36).

My Profile Changes

- **Email Address –** You can now change your email address. See *Change Email* (page 38).

- **Password –** You can change your password. See *Change Password* (page 39).

- **Security Question–** When logging in, if no security question exists you are prompted to create a security question. You will then be prompted for your security question details when changing your profile settings. See *Change Security Question* (page 40).

Other Changes

- **Browser Requirements/Unsupported Browser –** If the browser used is not supported an info bar is displayed at the top of the webpage. See *Prerequisites* (page 30).

DLM 350

05/08/11

Original VOS Online Appointment documentation re-organised into separate modular user guides:

- **VOS Configuration User Guide** - This is for practices to enable and setup VOS and configure services eg Online Appointments.

- **VOS Registration (Practice) -** This user guide explains how to register a patient for VOS and manage the registration.

- **VOS Registration (Patient) -** This user guide explains how a patient creates and activates a VOS user account.

- **VOS Using Online Appointment (Practice) -** This user guide explains how to configure Vision Appointments for use online.

- **VOS Using Online Appointment (Patient) -** This user guide shows how Online Appointments is used to book or cancel appointments.

- **Changes to Disable User Account** - In preparation for the release of Online Repeats the Disable User Account tools have been updated. Patients can be disabled from all VOS services or an individual module. See *Disabling the VOS User Account* (page 21) for further details.

VOS Registration (Practice)

Once Vision Online Services have been activated in Vision Control Panel, a new Online Services screen becomes available in **Registration**. This enables you to create a VOS web account for the patient, which will record the status of their account. This account can be disabled by the practice if misused by the patient.

The practice staff member registering the patient must confirm the identity of the patient, for example from photo identification. See *Add Patient Verification Details* (page 11).

The Registration process requires the use of an email address for the patient. If the patient does not have an email address, they cannot register for VOS.

> **Note** - We advise against using a shared email address. For example, if family members have separate VOS accounts but use the same email address, everyone who has access to this email address is able to see all online appointment booking and prescription ordering confirmation emails for all accounts.
>
> **Training Tip -** Email addresses can be added to a patient's Registration screen as a Communication entry; add the email address as you would add a telephone number for the patient, select email from the drop down list.

Once the registration is complete, you must print off the Registration letter and give it to the patient. They must then go to the VOS website to complete their registration. See *Registration (Patient)* (page 30) for further details.

The letter contains the following details:

- **Practice ID** (your practice identifier)
- **Patient ID** (NHS number in England, CHI number in Scotland and H+C number for Ireland)
- **VOS Registration Token**

> **Note -** In England and Wales, accounts can only be created for patients with a new style NHS number. In Scotland the CHI number is required and in Northern Ireland the H & C Number. This detail will be recorded as the **Patient ID.**

Add Patient Verification Details

When a patient asks to register for Online Services, you must ask them to provide you with a form of identification. Once you have viewed this, you must record that you verified their identity on their patient record as follows:

1. In Consultation Manager, select the relevant patient and make sure a patient is selected.

2. In the Read Term Add box type **#91B** and press enter.

3. **91B..00 Patient registration data verified** is displayed, click **OK** to invoke the History Add form.
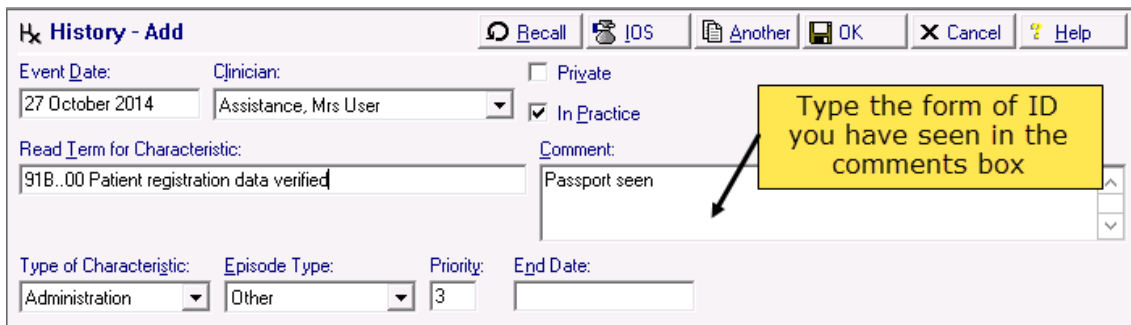
4. On the History Add form, type the form of patient ID you have seen in the comments box ie passport

History Add - Patient registration data verified

5. Click **OK** to save.

📄 **Note** - If a patient provides another form of ID in the future, rather than edit the existing information, you should add a new entry.

Creating a VOS Online Account

> **Note -** If the patient has already created an Online Account for Online Appointment purposes, they will not have to register again to use Online Repeats. If you do not wish patients to be automatically registered for additional modules contact INPS Sales or your account manager. See also *Disabling the VOS User Account* (page 21).

See Creating an Account for a Dependant for information on patients who want to create/manage accounts for dependants.

1. Go to **Vision – Registration,** select the patient and click on the **Online Services** tab.
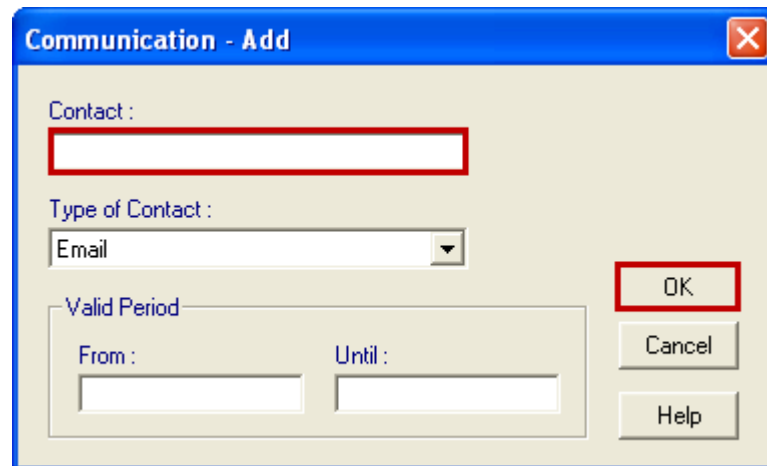
Registration – Online Services

2. Select or add a confirmation email address. To add a new email address click the **Add** ⬚ᴬᵈᵈ button, type the patient's email address in the **Contact** box, then click **OK** to save and close. This email address will be used to send confirmation and reminder messages to the patient.
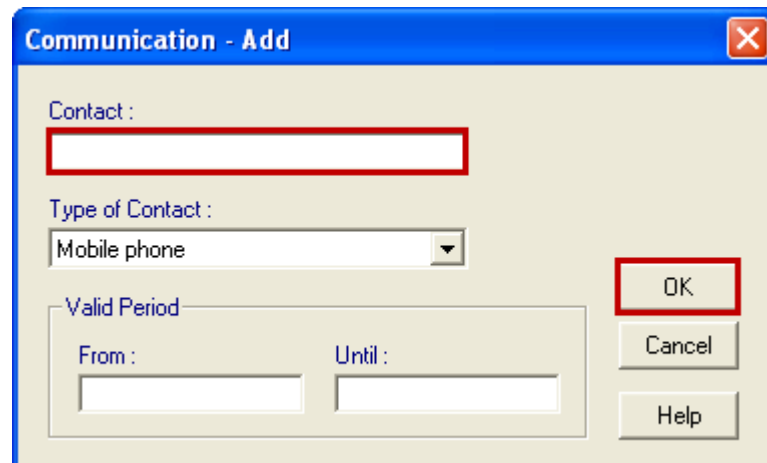

Communication Add – Email Address

3. Next, select or add a Confirmation SMS Number, to add a communication number click the **Add** ⬚ᴬᵈᵈ button, type the mobile number in the **Contact** box, click **OK** to save and close.

> **Note -** SMS messaging is only available to practices in England and Scotland who have setup an NHS Mail account for VOS.

Communication Add – Mobile Number

4. Click the **Create Online Account** button; this will generate a 10 character **Registration Token** and launch **Microsoft Word** with a letter containing the patient's **Online Registration Details:**

   - **Practice ID**

   - **Patient ID** (NHS number in England, CHI number in Scotland and H+C number for Ireland)

   - **VOS Registration Token -** Including the expiry date set by the practice, see "*VOS Configuration User Guide* (*http://www.inps4.co.uk/downloads/vos/configuration*)" for further details.

VISIONONLINE

05 October 2011

The INPS Practice

Mr Matthew M A
185 Privett Road
Leeds
Z99 9ZZ

Vision Online Services
Registration Details

Dear **Mr Matthew M A**

This letter is confirmation that you have been registered to use Vision Online Services. You will require the following details to register online:

Website:	www.myvisiononline.co.uk
Practice ID:	G12345
Patient ID:	4036381482
Registration Token:	BB8DCB49FA (Expires on 30/10/2011)

Go to the website, type www.myvisiononline.co.uk then click the Register tab.

VISIONONLINE

Sign In   Register
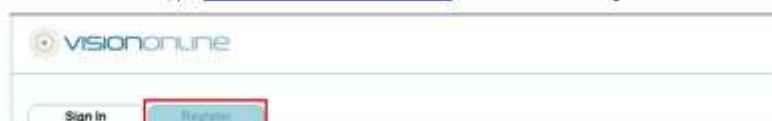
You will need to create a username and password, and then activate your account. Following this process, you will be able to login and use the Vision Online Services.

Yours Sincerely,

The INPS Practice

Registration Confirmation Letter

5. Check the details and if correct, print out the letter and hand it to the patient.

6. The **Online Services** tab will then show that the account has been **Created.** Click **OK** to close.

Note - The Registration Letter can be edited to add additional practice details. Go to P:\Wordproc\Template\VosRegdetails.doc.

Account Created

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

Adding Communication Details

1. Go to **Vision - Registration;** select a patient, click on the **Address** tab**.**

Patient Registration Screen

2. Click the **Add** [Add] button to add a contact for the patient.

   📒 **Note -** Contact details can be added to the main address or as a contact for the patient.
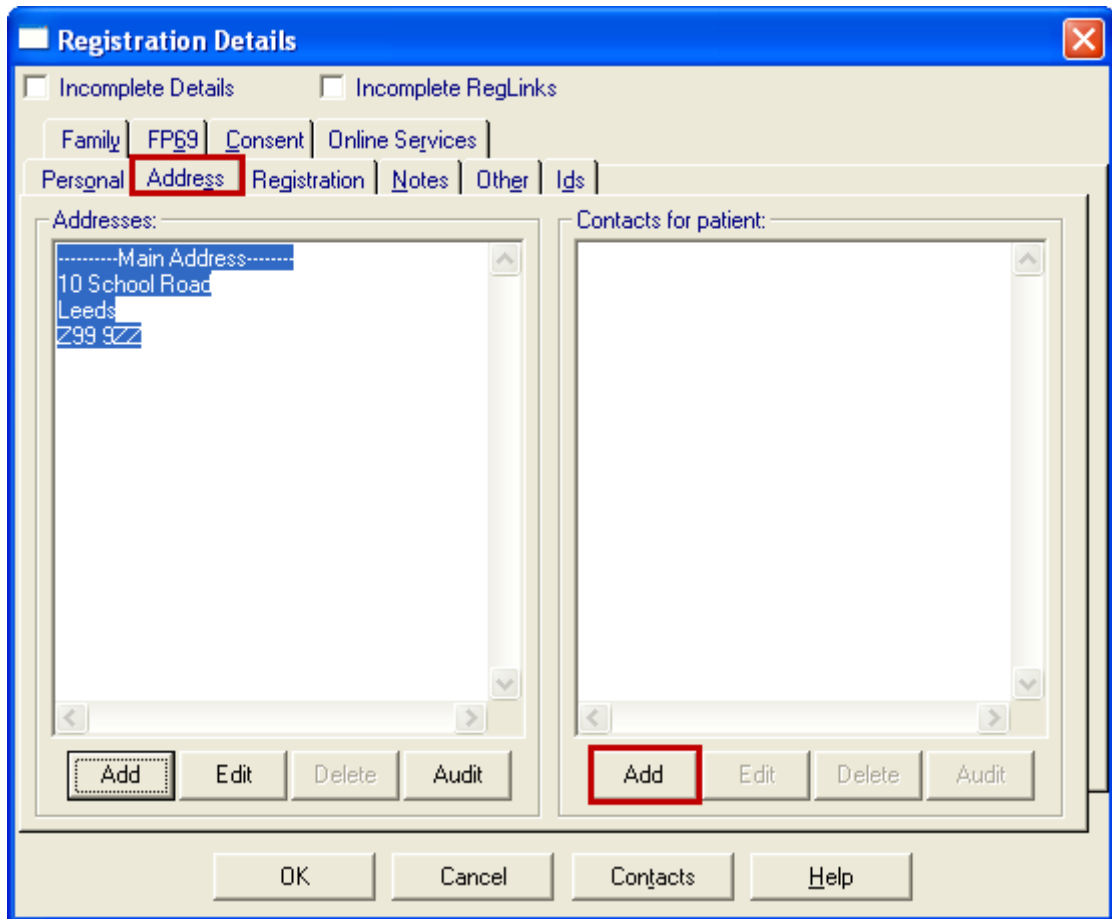
Registration - Address

3. Type the contact details in the **Contact** window, eg email address or mobile phone number. Select the type of contact from the **Type of Contact Number** drop down list, eg Email or Mobile phone.
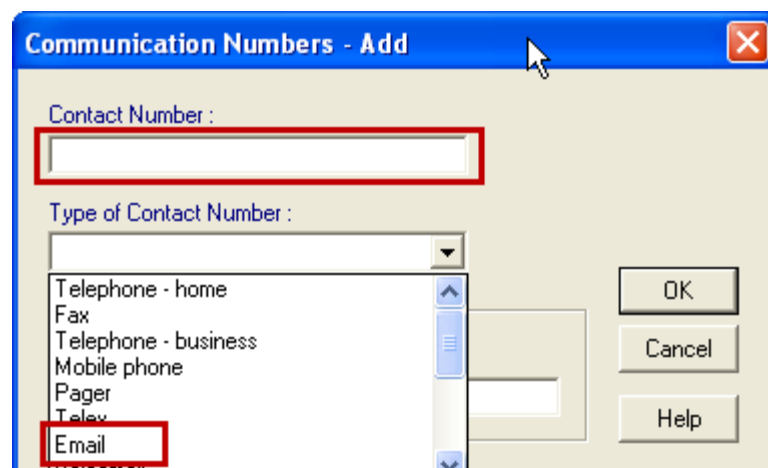
Communication Numbers - Add

4. Click **OK** to save and close, click **OK** to close the patient Registration screen.

📄 **Note –** If, following Online Registration, the email address is removed; the patient will be unable to log in.

Registration Status

There are four online account status':

Online Account - Created

When the patient has supplied their email address, the Online Account is then created in Vision Registration and a Registration Confirmation Letter generated and given to the patient. Their status will be shown as **Created**.

Online Account - Registered
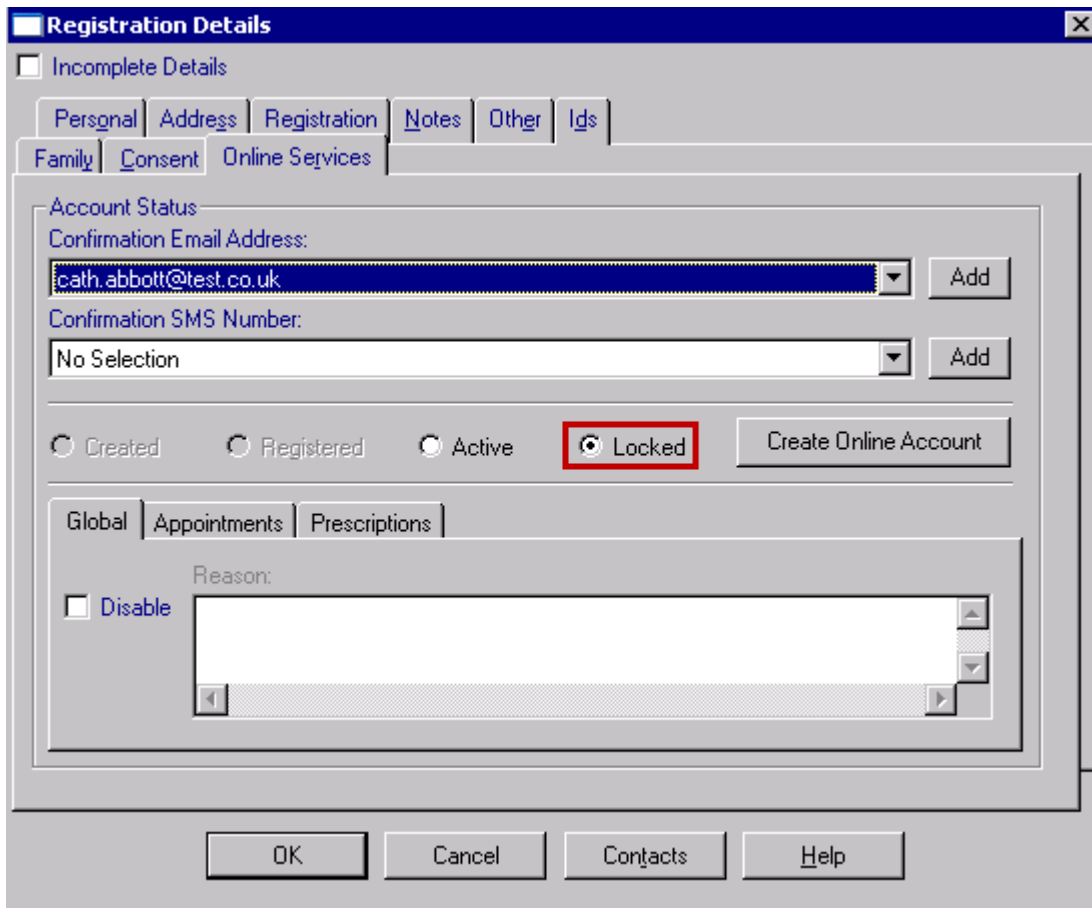
When the patient has completed the Online Registration Process, creating a username and password, but not activating the account by acknowledging the confirmation email, the status will be shown as **Registered.**

Online Account - Active

When the patient has activated the Online Account by following the link in the confirmation email, the account status will be shown as **Active**.

Online Account - Temporarily Locked

After 5 unsuccessful log in attempts the patient's online account will be locked temporarily for 4 hours. The patient's account status in **Registration Details > Online Services** will change from 'Active' to 'Locked':

Account Locked

After the 4 hour lock period, the patient's online account will unlock automatically and the status will change back to 'Active'.

See *Unlock User Account* (page 21) for instructions on how to unlock the patient's online account manually.

Unlock User Account

To unlock a patient's online account manually:

In **Registration Details > Online Services** click on 'Active' to unlock the patient's online account:

Unlock Online Account

Disabling Online Services

You can disable the patient's online services globally or by specific module if, for example:

- The patient chooses to opt out of Online Services or a specific module ie Online Appointments, Online Repeats
- The service is being abused by the patient

Online Appointments is disabled automatically for a patient if they exceed the practice's online DNA limit. See *Patient Reached Online DNA Limit - Online Appointments Access Disabled* (page 25).

To Disable a User Account

1. Go to **Vision - Registration,** select the patient and click the **Online Services** tab.

2. To disable the patient's Online Account the following options are available:

   - **Global -** This disables all services available to the Account. The patient is unable to log in.

   - **Appointments -** This prohibits access to the Online Appointments module only.

   - **Prescriptions -** This stops the patient ordering repeat prescriptions online only.

3. Select the required tab and tick the **Disable** box, type a **Reason** in the **Reason** Window (optional).

Account Disabled

The patient will not be able to use the Online Services you have disabled.

4. Click **OK,** to save and close. If the patient attempts to log in they will receive a message confirming their Account is Locked.

5. The Account can be **Reactivated** by clicking to remove the Disable tick. The patient can now log in without having to re-register.

Patient Reached DNA Limit - Account Disabled

If you have set the patient's account to be disabled on reaching a specified number of Did Not Attend (DNA) appointments, the patient is prompted when logging in online: User account has been disabled. Please contact your practice.

Sign In Screen - Account Disabled

The Global Disable settings are changed automatically and the number and date range of the DNA'd appointments is displayed.

Global Disable - DNA Limit Reached

Online DNA Limit Exceeded - Online Appointments Access Disabled

If you have set patient access to the Online Appointments module to be disabled on reaching a specified number of Did Not Attend (DNA) appointments, when the patient exceeds that limit the system does the following:

In **Registration - Online Services tab - Appointments tab** the Appointments Disable settings are changed automatically (the Disable box is ticked) and the following reason is now automatically displayed in the Reason box:

'User has exceeded the maximum number of DNAs allowed':

Registration - Online Services tab - Appointments tab - Appointments Disabled (Online DNA Limit Exceeded)

The next time the patient logs into VOS, links to the Appointments module are no longer displayed and the Appointments tab is unavailable.

The patient cannot access the Appointments module until it has been enabled again.
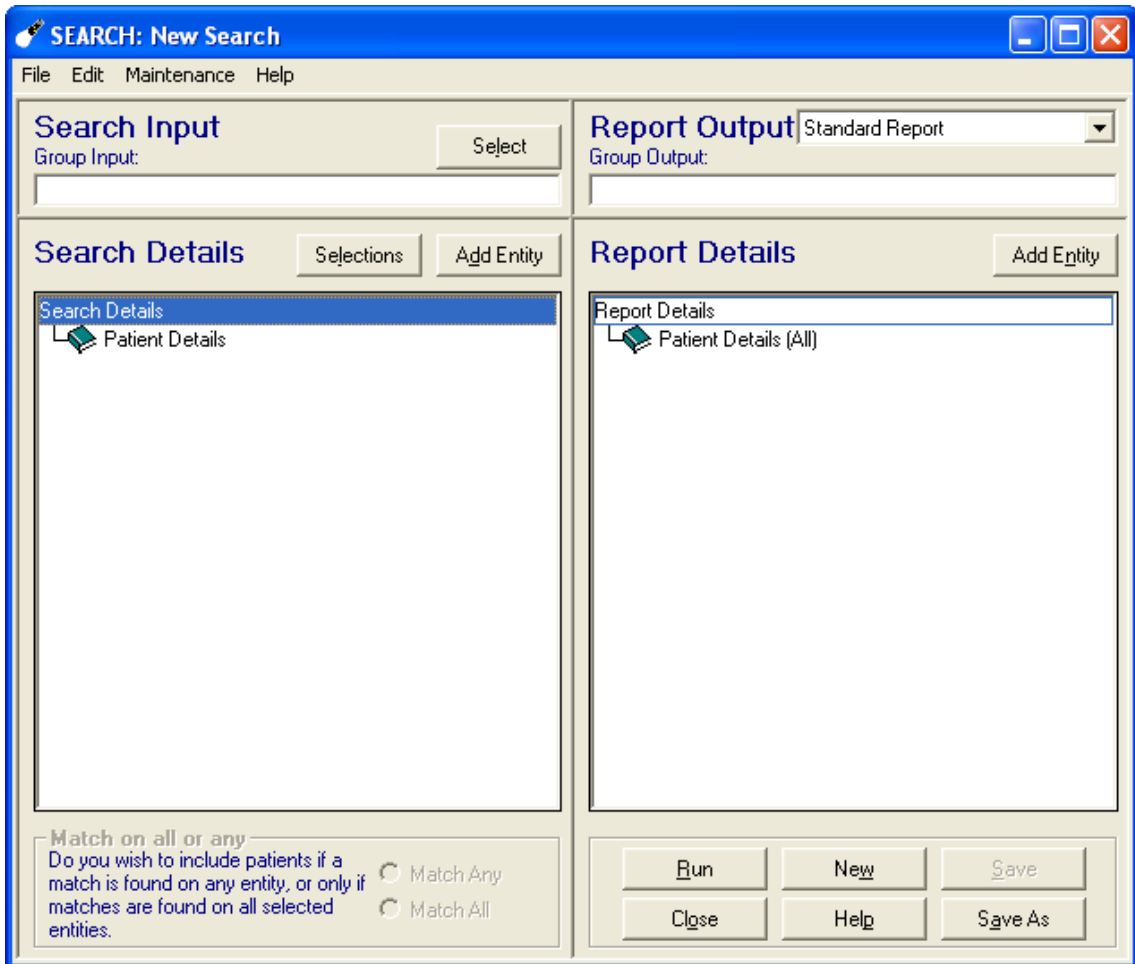
💡 **Training Tip** - You can reactivate the online account by removing the tick from the Disable box.

Searching for Patients with an Online Account

You can create an ad-hoc search to identify patients with an online account. You can also filter by registration status. See *Create an Ad-Hoc Search for Patients with a VOS Account* (page 26).

Create an Ad-Hoc Search for Patients with a VOS Account

1. Log in to Vision; go to **Reporting - Search and Reports.**

2. Click the New Ad-Hoc Search icon [icon] icon to open the ad-hoc search screen:

3. Click **Add Entity** above the Report Details panel to open the **Select from Group** popup.

4. Open the **Miscellaneous Searchable Entities** folder and select **VOS Users**
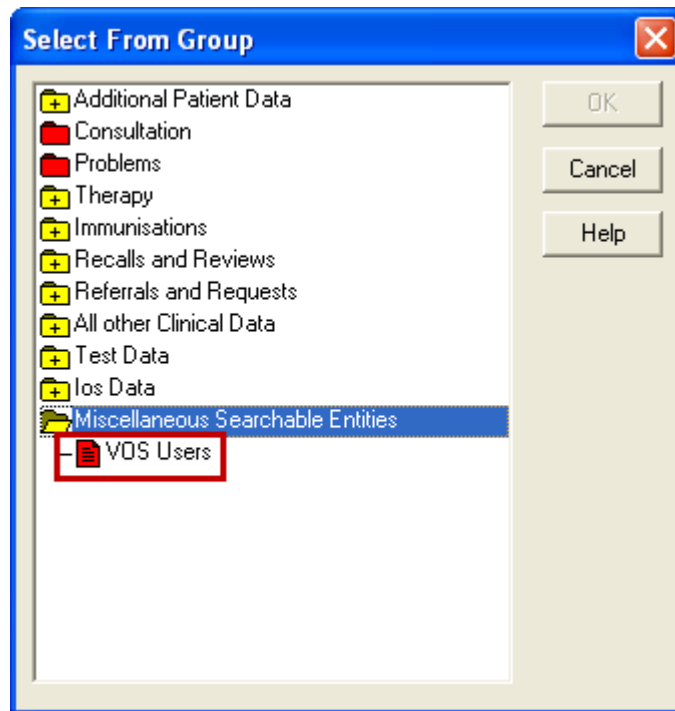
5. Click **OK** to close the popup.

6. To select the criteria for your search, highlight the VOS Users entity in the Search Details panel and click **Selections.**
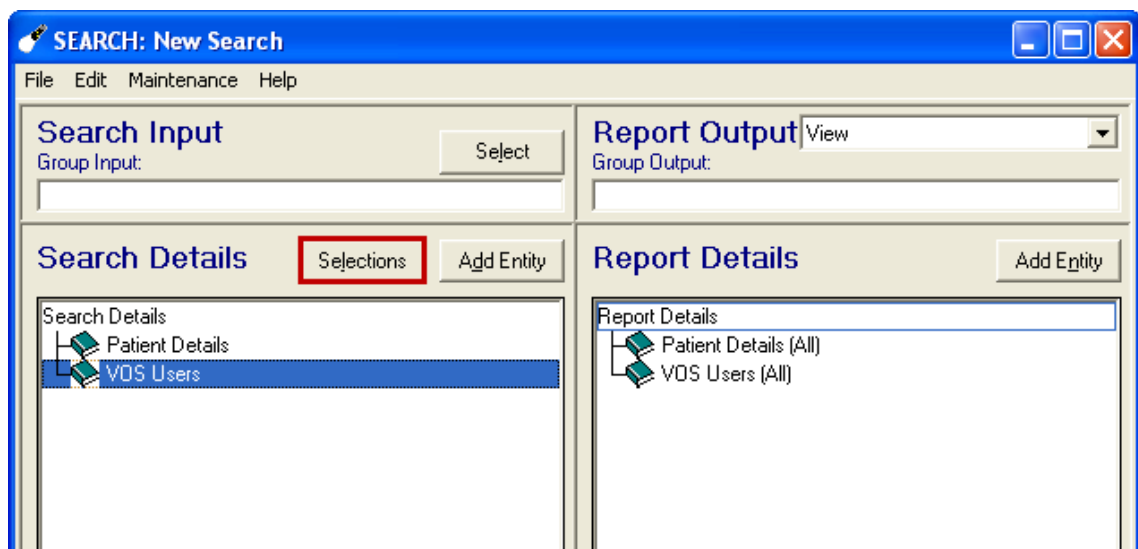
7. This opens the **Criteria Select** window. Select your criteria using the following options:

   - **Inactive -** Select Inactive = Yes to find patients whose VOS account has been disabled.

   - **Input Operator -** A particular user(s) can be selected.

- **VOS Registration Status -** Select from Active, Created, Locked, Registered. See *Registration Status* (page 19)
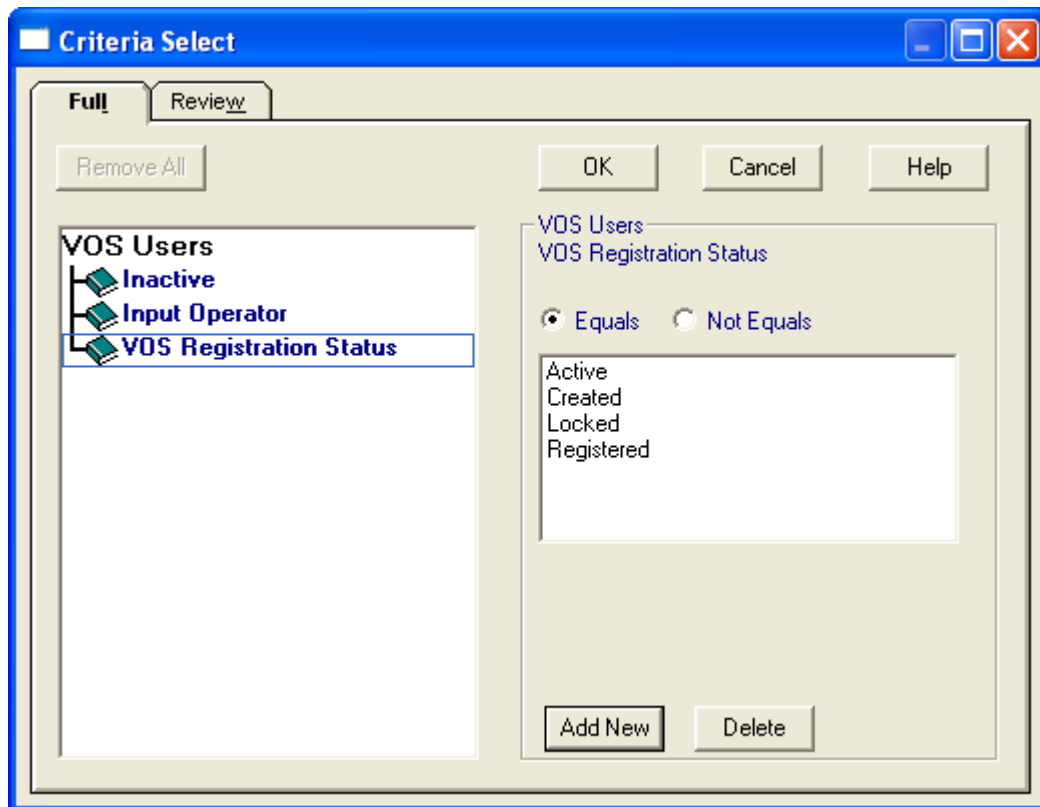
8. Click **Run** to display the search results.

Print a Standard Report

1. Select **Standard Report** from the Report Output drop-down list.
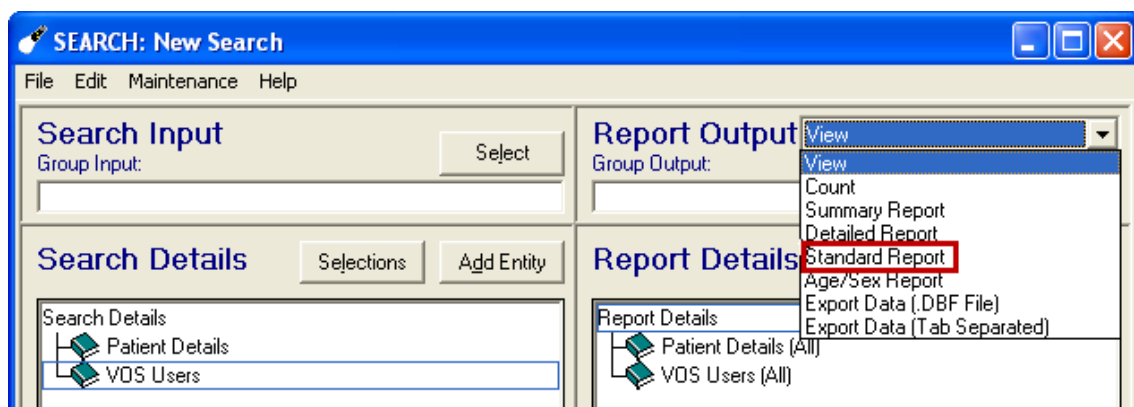
2. Click **Run** to create the report, or if the search has previously been run, select **File – Report on Last Search** which uses the previous run to produce the report.
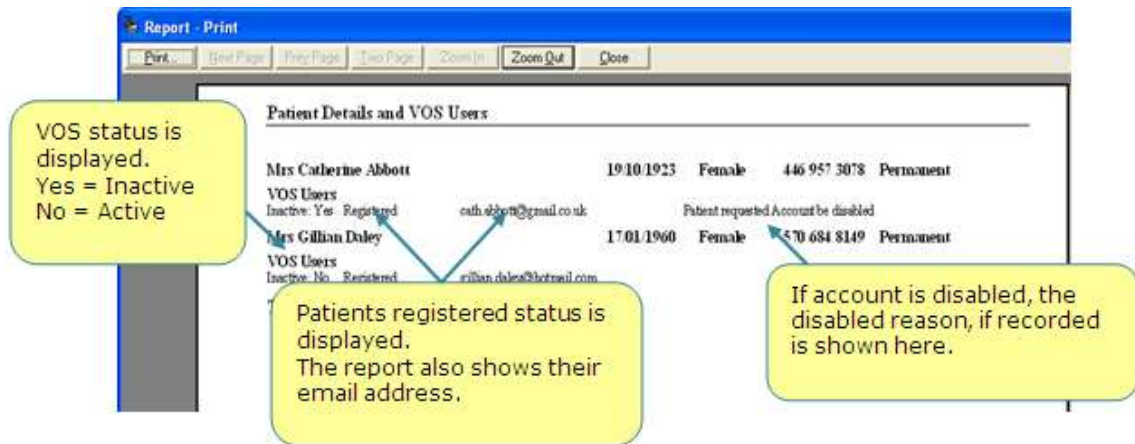
3. To print, click **Print.**

Re-entered Online Patient Email Address

If a registered online patient's email address is not recorded in the system, they will be asked to re-enter their email address when logging in to their online account. However, if applicable, please be vigilant when updating from the PDS mismatch screen that you do not unintentionally remove email addresses.

When the patient has re-entered their email address it will be updated in the following 2 places:

- **Registration Details - Online Services** tab, in the Confirmation Email Address box
- 'Contacts for patient' panel in the Address tab.

Practice Split

When a Practice Split is planned for your practice, you will receive all necessary information and support from INPS.

Patients using VOS will be informed if their Practice ID has changed when logging in:

Patients are advised to make a note of their new practice identifier for the next time they log in.

See *Logging in After a Practice Split* (page 37).

Registration (Patient)

This section of the user guide explains the Registration process undertaken by the patient to create an online user account, how to maintain it and how to log in and out. Their process starts with the registration letter which is generated at the practice when registering the patient in Vision Registration. See *Creating a VOS Online Account* (page 13).

The letter confirms the patient's registration details, which are required to complete the Registration and Activation process. Once the patient has created and activated their online account, they can log in and use the online modules available at your practice.

Prerequisites

Internet Browsers

The Following browsers can be used to access VOS:

- Microsoft Internet Explorer 6 or higher
- Firefox 3.x or higher
- Safari 2.x or higher
- Chrome 5.x or higher

Mobile Operating/Software Systems

VOS can also be accessed from a mobile phone (smartphone), your phone can be used if it has one of the following mobile operating/software systems:

- iPhone
- Android
- Blackberry (OS6)

Creating an Online Account

Before you can use VOS, you must complete the registration and activation process:

- *Online Registration* (page 31)

- *Activating Your Online Services Account* (page 32)

> ⚠ **Note -** When you are registering to use VOS we advise against using a shared email address. For example, if you and other family members have separate VOS accounts but use the same email address, everyone who has access to this email address is able to see all online appointment booking and prescription ordering confirmation emails for all accounts.

> 📒 **Note** - If you have any problems setting up and using your VOS account, please contact your practice.

Online Registration

1. In your internet browser, go to the following website: www.myvisiononline.co.uk. This web address is included in the letter from your GP practice.

2. From the Online Services Home page, click on the **Register**

    Register tab.

3. With the registration letter from your GP practice to hand, enter the following details:

    - The **Practice ID** (this is a 6 digit alphanumerical code). If you have forgotten your Practice ID, you can search for it using the search facility provided on the Log in screen. See *Practice ID – Search facility* (page 45).

    - The **Patient ID** (NHS number in England, CHI number in Scotland and H+C number for Ireland)

    > 📒 **Note** - If you are registering yourself, this will be your Patient ID.

    - Your **Registration Code** in the **Registration Token** box (this is a 10 digit alphanumerical code, used to activate your account). This code is case sensitive so be careful to type it exactly as it appears in the Registration Letter.

    > 📒 **Note -** Your Registration Token may have an expiration date, if so this will be displayed on your Registration Letter. If the date has expired you will not be able to register. Contact your practice for a new Registration Letter.

4. Next you must create a username (max 15 characters). If the username is already in use, "**Failed -Username is not available"** is displayed when you complete the form. You must create a new username to continue.

5. Then enter a Password. This must be at least 6 characters long and contain upper and lower case letter(s) and number(s).

6. Read the **Terms & Conditions** (page 50) and **Privacy Policy** (page 47), and tick the box to confirm acceptance of these conditions.

7. Click **Register** to create your Online Account.

You have successfully registered with your GP practice to use Online Services. Please keep your username and password details to hand.

Your account now needs to be *activated* (page 32), an email has been sent to your email address.

Activating Your Online Services Account

Following successful *Registration* (page 31), you will receive a confirmation email which displays your Confirmation Code and a link to activate your account. Your Account is not active until this is done.

> 📄 **Note -** Your practice may have set a time limit for Online Services accounts to be activated. If you don't activate your account before this period expires, you will have to re-register. If your Registration Token has also expired, you will have to contact your practice to obtain a new Registration Letter.

You can do this in two ways:

1. On receipt of the email, click on the link which will take you to the Online Services Registration Confirmation screen.

   OR

   If you are still logged in to the Online Services website, enter the Confirmation Code directly into the Confirmation Code box and click **Activate**.

2. Once you have activated your account, "**Registration: Successful** *Your account has been activated. Please enter your password to continue*" is displayed. You are prompted to type your password in the box and click **Continue**, to log in. Once logged in you can go ahead and use Online Services.

3. The first time you sign in you are prompted to set a Security Question. Select a question from the following drop-down list:

   - What is the name of your first school?

   - What was your childhood nickname?

   - What is your mother's maiden name?

4. Type an answer in the **Answer** box and click **Submit.** For further details see "Change Security Question".

> 📄 **Note** - If you are having problems registering or activating your account, please contact your practice.

Logging in to Vision Online Services

Once you have activated your account and have a user name and password you can visit the website to use the Online Modules available at your practice.

1. Go to *www.myvisiononline.co.uk* (*http://www.myvisiononline.co.uk*).

2. Enter your **Practice ID**. This can be found on your letter from the practice, or use the search facility (see *Practice ID – Search facility* (page 45) for further details).

> 📒 **Note** - The system will remember your Practice ID after the first time you log in successfully so you will not have to enter it in subsequent logins.

3. Enter your **Username**. If you have forgotten your username there is a link, which when used will send a username reminder to your email account. See *Forgotten Username* (page 34) for further details.

4. Enter your **password**, click on the **Sign In** button to access the opening screen. If you have forgotten your password, there is a link which when used will send a password reminder to your email account. See *Forgotten Password* (page 36) for further details.

Sign In Screen

5. If you entered the correct details, your Online Appointments Account will open.

6. The first time you log in you will be prompted to create a security question. See "*Change Security Question* (page 40)" on page   for further details.

7. Once completed you can proceed use the available modules.

Home Page

Note - You have a maximum of 5 unsuccessful log in attempts before your VOS account is locked. If this should happen, your account will be unlocked automatically after 4 hours. If, after 4 hours, your account is still locked please contact your practice.

Note - If your email address is not recorded in the system, you will be prompted to re-enter your email address when logging in. See *Log In - Re-enter Email Address* (page 44)

Forgotten Username

If you have forgotten your username, a link on the Log In screen enables you to request a reminder.

1. From the Log In screen, click the link Forgotten username? .

2. A Username Reminder window is displayed. You are prompted: *Please enter your Practice ID and email address and we will send you a reminder of your username. If you are unsure of your Practice ID, please use the Search button to locate our practice by name.*

Username Reminder

Please enter your Practice ID and email address and we will send you a reminder of your username. If you are unsure of your Practice ID, please use the Search button to locate your practice by name.

Practice ID:	[ ]	Search
Email Address:	[ ]	
	Submit	

For help click here

3. Enter your **Practice ID**, this is found on your registration letter or use the search facility. See *Practice ID – Search facility* (page 45).

4. Enter your email address (this must be the address used for VOS).

5. Click **Submit** Submit .

6. The Identity Verification window opens; you are prompted to answer your security question. Type the answer in the **Answer** box.

Identity Verification

Please answer the following question to verify your identity.

Security Question: **What is your mother's maiden name?**

Answer: [   ]

Submit

For help click here

Identity Verification

7. Click **Submit** Submit .

8. A **Reminder Sent** message is displayed, you are prompted: *A reminder has been sent to your registered email address. Please check your email and follow the instructions in it.*

9. Click **Close,** you are returned to the Log In screen ready to log in when you have received your reminder.

> **Note –** If you have forgotten your security answer, contact your practice for a new registration letter, you will need to re-register.

Forgotten Password

If you have forgotten your password, a link on the Log In screen enables you to request a reminder.

1. From the Log In screen, click the link Forgotten password? .

2. A Password Reminder window is displayed. You are prompted: *Please enter your Practice ID, username and email address and we will reset your password. If you are unsure of your Practice ID, please use the Search button to locate our practice by name. If you are unsure of your username click here. (*Clicking here opens the Username Reminder window for you to request a username reminder)

Password Reminder

Please enter your Practice ID, username and email address and we will reset your password. If you are unsure of your Practice ID, please use the Search button to locate your practice by name. If you are unsure of your username click here

Practice ID: [   ] [Search]

Username: [   ]

Email Address: [   ]

[Submit]

For help click here

3. Enter your **Practice ID**, this is found on your registration letter or use the search facility. See *Practice ID – Search facility* (page 45).

4. Enter your **Username,** See "*Forgotten Username* (page 34)" on page .

5. Enter your email address (this must be the address used for VOS).

6. Click **Submit** [Submit] .

7. The Identity Verification window opens; you are prompted to answer your security question. Type the answer in the **Answer** box.

Identity Verification

Please answer the following question to verify your identity.

Security Question: **What is your mother's maiden name?**

Answer: [   ]

[Submit]

For help click here

8. Click **Submit** [Submit] .

9. A **Password Reset** message is displayed, you are prompted: *Your password has been reset and an email containing your new password has been sent to*

your registered email address. Please check your email and follow the instruction in it.
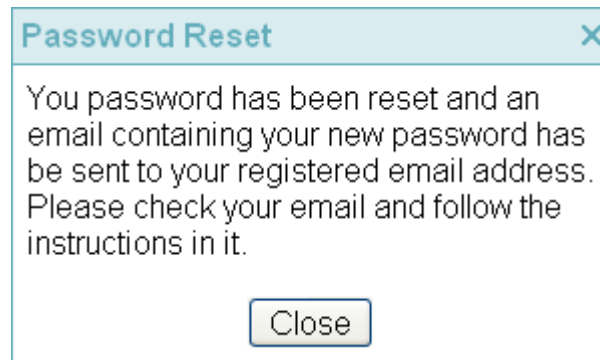
10. Click **Close,** you are returned to the Log In screen ready to log in when you have received your new password.

11. Log in using the temporary password contained in the email, you are prompted to change password.

12. Type a new password in the **New Password** box, then retype it in the **Confirm Password** box.

13. Click **Change,** you are now logged in to Vision Online Services.

> **Note –** If you have forgotten your security answer, contact your practice for a new registration letter, you will need to re-register.

Account Temporarily Locked

After 5 unsuccessful log in attempts, your account will become temporarily locked for 4 hours and you will see the following message:

> *'Due to too many unsuccessful login attempts, your account has been locked for the next 4 hours.'*

In this situation you must wait 4 hours before attempting to access the system. After this time you should be able to log in normally. If you are unable to log in after the 4hr period expires, please contact your practice.

Logging in After a Practice Split

Your practice identifier which is used for logging into Online Services might change. If it does change, the next time you log in, a message will be displayed with your new practice identifier:

Please take a note of your new practice identifier for the next time you log in.

Click on **Continue** on the right of the screen to sign in automatically with the new identifier.

My Profile

From the My Profile tab you can complete the following tasks:

- Change Email
- Change Password
- Change Security Question
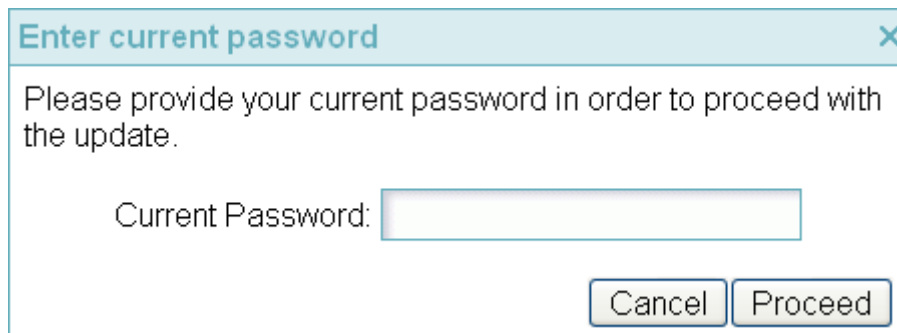
Change Email

To change the email address used for confirmation messages and reminders:

1. Click on the Tab **My Profile** at the top of the screen or select **My Profile** from the menu in the middle of the opening screen.

2. The **Email Address** box contains your current email address, type your new address in the box and click **Change.**

3. The **Enter current password** window is displayed.

4. Type your current password in the **Current Password** box. Click **Proceed** to continue or **Cancel** to close.

5. If you clicked **Proceed,** you are prompted: *Your details have been updated successfully.* Click **Close** to finish.

6. Your email address has now been updated at your GP practice and online.

Change Password

You can amend your password once logged in to Vision Online services.

1. Click on the Tab **My Profile** at the top of the screen or select **My Profile** from the menu in the middle of the opening screen.

2. Type your new password in the **New Password** box, then retype in the **Confirm Password** box, click **Change** to finish.

Change Password

Use the form below to change your password.

New Password: [   ]

Confirm Password: [   ]

Passwords must be a minimum length of 6 characters with a combination of uppercase, lowercase and numbers.

[Change]

For help changing your password click here

3. You are prompted to enter your current password, type your current password in the **Current Password** box. Click **Proceed** to continue, or **Cancel** to close.

Enter current password   ✕

Please provide your current password in order to proceed with the update.

Current Password: [   ]

[Cancel] [Proceed]

4. If you clicked **Proceed,** a confirmation message is displayed, you are prompted: *Your password has been changed successfully.* Click **Close** to finish.

Password changed   ✕

Your password has been changed successfully.

[Close]

Change Security Question

You are now required to create a security question answer. This answer will be required to make changes to your personal details online.
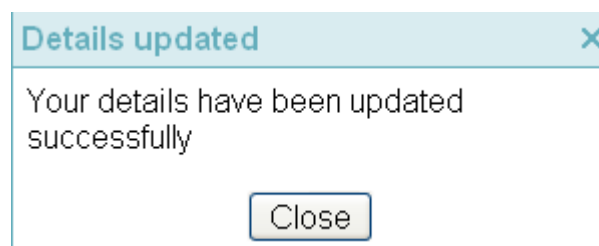
1. Click on the Tab **My Profile** at the top of the screen or select **My Profile** from the menu in the middle of the opening screen.

2. Select a question from the drop-down list, your choices are:

    - What is the name of your first school?

    - What was your childhood nickname?

    - What is your mother's maiden name?

3. Enter your answer in the **Answer** box.

4. Click **Change.**

5. You are prompted to enter your current password, type your current password in the **Current Password** box. Click **Proceed** to continue, or **Cancel** to close.

6. If you clicked **Proceed,** a confirmation message is displayed, you are prompted: *Your security question has been updated successfully.*

Navigating the Website

External Links on Website

External links are available at the bottom of the Home Page after logging in.

External Links Available on the Website:

http://www.theinformationstandard.org/
http://www.nhs.uk/CHQ/Pages/home.aspx
http://www.nhs.uk/News/Pages/NewsIndex.aspx
http://www.nhs.uk/Conditions/Pages/hub.aspx
http://www.nhs.uk/medicine-guides/pages/default.aspx
http://www.patient.co.uk/index.asp
http://www.nhs.uk/livewell/Pages/Livewellhub.aspx

Troubleshooting

Registration Failed

If registration fails, the error reason should be displayed at the top of the log in screen. Registration may fail for a number of reasons e.g.:

- **Username is not available** – Type in a new username and click Register, if unique the username will be accepted.

- **Password not of correct length or format** – Type in a new password, ensuring at least 6 characters long, and contains an upper and lower case letter(s) and number(s).

Failed Password Creation

- **Registration details not found** – Contact your GP practice, they will re-register you and print a new Confirmation Letter containing a new Registration Token.

Account Registered but Not Activated

If you have registered your details and created a username and password, but not activated your account, you will be unable to log in. You need to complete the Activation process to use your Online Account, see Activating the Account. If your practice have set a time limit for activating user accounts, your may be unable to continue to activate your account. Contact the practice and request a new registration letter, you will need to re-register to access Vision Online Services.

Lost Registration Confirmation Letter before Registering your Online Account

Contact your GP practice and request that they re-create your Online Account. This will generate a new Registration Confirmation Letter with a new Registration Token. Use this letter to complete the Registration and Activation processes. See Online Registration and Activating the Account.

GP System Unavailable

On occasion, you may find that the Vision Online Services (VOS) website is not available, for example if there is a problem with your email address. You will see the following message when trying to access the website: "The *Practice is currently unavailable, please try again later*."

Try logging in later to see if the problem has been resolved, if this problem continues, please contact your GP practice.

Log In – Failed Attempt

1. If you enter the wrong username or password, you will be unable to open Online Appointments, and you will see an error message on the screen: *Invalid Username/password*.

2. Retype your username; retype your password ensuring you have the correct details. Click **Login** to retry.

3. If successful, you will see the Home page. If log in fails again, check the error message and retry the log in process again.

4. If you have forgotten your username and/or password, you can use the links on the Log In page to request reminders. See *Forgotten Username* (page 34) and *Forgotten Password* (page 36) for further details. Or contact your GP practice to request your VOS account is re-created. A new Registration Confirmation Letter will be given to you. You will need to register again.

> **Hint -** If you know your username, you can re-use it when re-registering, you then only need to create a new password.
>
> **Note** - You have a maximum of 5 unsuccessful log in attempts before your VOS account is locked. If this should happen, your account will be unlocked automatically after 4 hours. If, after 4 hours, your account is still locked please contact your practice.
>
> **Note** - If your email address is not recorded in the system, you will be prompted to re-enter your email address when logging in. See *Log In - Re-enter Email Address* (page 44).

Log In - Re-enter Email Address

If your email address is not recorded in the system, you will be prompted to re-enter it when logging into your account.

Practice ID – Search facility
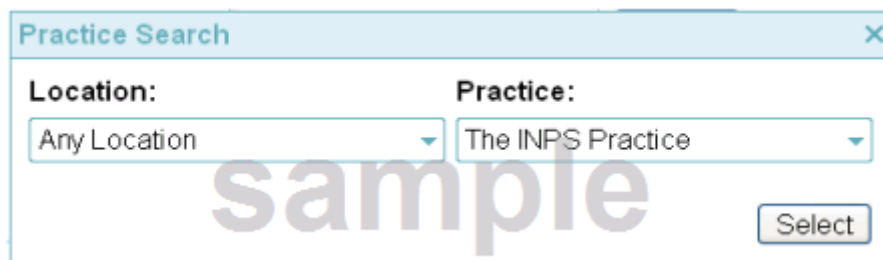
If you have forgotten your Practice ID, you can search for it using the search facility provided on the Log in screen.

1. Click on the **Search** [Search] button alongside the Practice ID box to open the Practice Search screen:

2. **Location** - If you select a location from the Location list, this then filters the Practice list to surgeries within that area. The default is Any Location.

   Practice - This is an alphabetical list of all practices, select your practice from the list or filter using the Location list.

3. Once you have found your practice, click **Select.**

   Your Practice ID is added to the Log in screen.

Help Logging In

If you experience problems when trying to log in; click on the link to open the Help Logging in screen.

Unexpected Errors

If the webpage encounters and unexpected error you are prompted: "*Sorry – Vision Online Services Encountered An Error. We are sorry for any inconvenience caused. If you have any questions, please contact your GP surgery.*"

Click the **Back** button to return to the last page you visited before the error occurred, or click **Logout** to end the current session and return to the log in screen to log in again.

System Logout

If you are logged in to Vision Online Services and there is a period of 10 minutes of inactivity, you account will be automatically closed. Log in to return to the website and use the available services.

Terms & Conditions and Privacy Statement

If you wish to access the Terms of Service or Privacy Policy, there is a prompt at the bottom of the opening Screen where you can access these documents.

Logout

When you have finished using the VOS website, click the **Logout** link in the top right of the screen. You will be logged out of the service.

Privacy Policy

In Practice Systems Limited ("We", "Us" and "Our") is committed to protecting and respecting your privacy.

This policy (together with Our terms of use) sets out the basis on which any personal data We collect from you, or that you provide to Us, will be processed by Us. Please read the following carefully to understand Our views and practices regarding your personal data and how We will treat it.

The person on whose behalf We process your personal data is your practice with whom or with which you are registered as a patient ("your practice").

INFORMATION WE MAY COLLECT FROM YOU

We may collect and process the following data about you:

- Information that you provide by filling in forms on Our site **www.myvisiononline.co.uk** (Our site). This includes information provided at the time of registering to use Our site or making use of the services provided on this site. We may also ask you for information when you report a problem with Our site.

- If you contact Us, We may keep a record of that correspondence.

- Your practice or We may also ask you to complete surveys that We use for research purposes, although you do not have to respond to them.

- Details of transactions you carry out through Our site.

- Details of your visits to Our site [including, but not limited to, traffic data, location data, weblogs and other communication data, whether this is required for Our own billing purposes or otherwise] and the resources that you access.

IP ADDRESSES AND COOKIES

We may collect information about your computer, including where available your IP address, operating system and browser type, for system administration. This is statistical data about Our users' browsing actions and patterns, and does not identify any individual.

For the same reason, We may obtain information about your general internet usage by using a cookie file which is stored on the hard drive of your computer. Cookies contain information that is transferred to your computer's hard drive. They help Us to improve Our site and to deliver a better and more personalised service. They enable Us:

- To estimate Our audience size and usage pattern.

- To store information about your preferences, and so allow Us to customise Our site according to your individual interests.

- To speed up your searches.

- To recognise you when you return to Our site.

You may refuse to accept cookies by activating the setting on your browser which allows you to refuse the setting of cookies. However, if you select this setting you may be unable to access certain parts of Our site. Unless you have adjusted your browser setting so that it will refuse cookies, Our system will issue cookies when you log on to Our site.

WHERE WE STORE YOUR PERSONAL DATA

All information you provide to Us is stored on Our secure servers. Where We or your practice have given you (or where you have chosen) a password which enables you to access certain parts of Our site, you are responsible for keeping this password confidential. We ask you never to share a password with anyone.

We work to protect the security of your information, during transmission to our site, by using Secure Sockets Layer (SSL) software, which encrypts information you input. Once we have received your information, we maintain physical, electronic and procedural safeguards in connection with personally identifiable information. It is important for you to protect against unauthorised access to your password and to your computer. Make sure you sign off when you finish using a shared computer.

USES MADE OF THE INFORMATION

We use information held about you in the following ways:

- To ensure that content from Our site is presented in the most effective manner for you and for your computer.
- To provide you with information or services that you request from Us or which We feel may interest you, where you have consented to be contacted for such purposes.
- To carry out Our obligations arising from any contracts entered into between you and Us.
- To allow you to participate in interactive features of Our service, when you choose to do so.
- To notify you about changes to Our service.

THIRD PARTY SITES

Our site may, from time to time, contain links to and from the websites of third parties. If you follow a link to any of these websites, please note that these websites have their own privacy policies and that We do not accept any responsibility or liability for these policies. Please check these policies before you submit any personal data to these websites.

ACCESS TO INFORMATION

The Data Protection Act gives you the right to access information held about you. Your right of access can be exercised in accordance with the Act. Any access request may be subject to a fee not exceeding the maximum allowed by law to meet Our costs in providing you with details of the information We hold about you.

CHANGES TO OUR PRIVACY POLICY

Any changes We may make to Our privacy policy in the future will be posted on this page and, where appropriate, notified to you by e-mail. However, you should check this page for the current privacy policy before using this site.

CONTACT

Questions, comments and requests regarding this privacy policy are welcomed and should be addressed to the practice where you registered for this service.

Terms & Conditions

TERMS OF WEBSITE USE

This page (together with the documents referred to on it) tells you the terms of use on which you may make use of Our website www.myvisiononline.co.uk (Our site), whether as a guest or a registered user. Please read these terms of use carefully before you start to use the site. By using Our site, you indicate that you accept these terms of use and that you agree to abide by them. If you do not agree to these terms of use, please refrain from using Our site.

INFORMATION ABOUT US

www.myvisiononline.co.uk is a site operated by In Practice Systems Limited ("We", "Us" and "Our"). We are registered in England and Wales under company number 1788577 and have Our registered office at The Bread Factory, 1a Broughton Street, Battersea, London, SW8 3QJ. Our main trading address is The Bread Factory, 1a Broughton Street, Battersea, London, SW8 3QJ. Our VAT number is 735898770

ACCESSING OUR SITE

Access to Our site is permitted on a temporary basis, and We reserve the right to withdraw or amend the service We provide on Our site without notice (see below). We will not be liable if for any reason Our site is unavailable at any time or for any period.

From time to time, We may restrict access to some parts of Our site, or Our entire site, to users who have registered.

If you choose, or you are provided with, a user identification code, password or any other piece of information as part of Our security procedures, you must treat such information as confidential, and you must not disclose it to any third party. We have the right to disable any user identification code or password, whether chosen by you or allocated by us, at any time, if in Our opinion you have failed to comply with any of the provisions of these terms of use.

You are responsible for making all arrangements necessary for you to have access to Our site. You are also responsible for ensuring that all persons who access Our site through your internet connection are aware of these terms, and that they comply with them.

INTELLECTUAL PROPERTY RIGHTS

We are the owner or the licensee of all intellectual property rights in Our site, and in the material published on it. Those works are protected by copyright laws and treaties around the world. All such rights are reserved.

You may print off one copy, and may download extracts, of any page(s) from Our site for your personal reference and you may draw the attention of others within your organisation to material posted on Our site.

You must not modify the paper or digital copies of any materials you have printed off or downloaded in any way, and you must not use any illustrations, photographs, video or audio sequences or any graphics separately from any accompanying text.

Our status (and that of any identified contributors) as the authors of material on Our site must always be acknowledged.

You must not use any part of the materials on Our site for commercial purposes without obtaining a licence to do so from Us or Our licensors.

If you print off, copy or download any part of Our site in breach of these terms of use, your right to use Our site will cease immediately and you must, at Our option, return or destroy any copies of the materials you have made.

OUR SITE CHANGES REGULARLY

We aim to update Our site regularly, and may change the content at any time. If the need arises, We may suspend access to Our site, or close it indefinitely. Any of the material on Our site may be out of date at any given time, and We are under no obligation to update such material.

OUR LIABILITY

The material and information on Our site is provided by third parties, and We are dependent on them for the accuracy of it. We do not undertake any sort of role in verifying the accuracy of any material or information. Accordingly, the material and information displayed on Our site is provided without any guarantees, conditions or warranties as to its accuracy by Us. Furthermore, We are not responsible for the number, timeliness or suitability of appointments shown as available by your practice on Our site. We will not be liable for any loss or inconvenience suffered by you as a result of relying on any of the material or information on Our site.

This does not affect Our liability for death or personal injury arising from Our negligence, nor Our liability for fraudulent misrepresentation or misrepresentation as to a fundamental matter, nor any other liability which cannot be excluded or limited under applicable law.

INFORMATION ABOUT YOU AND YOUR VISITS TO OUR SITE

We process information about you in accordance with Our *privacy policy* (page 47). By using Our site, you consent to such processing and you warrant that all data provided by you is accurate.

Your registered e-mail address will be used, by your GP practice, to send reminders and notifications. If you are sharing an e-mail address, those reminders and notifications will be viewable by any user of that shared e-mail address.

APPOINTMENTS CONCLUDED THROUGH OUR SITE

If you make an appointment with your practice by use of this site, you accept that this is a matter between you and your practice, and We have absolutely no role in that appointment or in the relationship between you and your practice other than the provision of these facilities for making online reservations by means of this site. You accept that We have no role in the provision of medical advice or any involvement in the actual appointment itself. Any liability you have for failing to attend or delay in attending any appointment or any inability of the practice to keep to the appointment promptly or at all is entirely a matter between you and your practice.

VIRUSES, HACKING AND OTHER OFFENCES

You must not misuse Our site by knowingly introducing viruses, trojans, worms, logic bombs or other material which is malicious or technologically harmful. You must not attempt to gain unauthorised access to Our site, the server on which Our site is stored or any server, computer or database connected to Our site. You must not attack Our site via a denial-of-service attack or a distributed denial-of service attack.

By breaching this provision, you would commit a criminal offence under the Computer Misuse Act 1990. We will report any such breach to the relevant law enforcement authorities and We will co-operate with those authorities by disclosing your identity to them. In the event of such a breach, your right to use Our site will cease immediately.

We will not be liable for any loss or damage caused by a distributed denial-of-service attack, viruses or other technologically harmful material that may infect your computer equipment, computer programs, data or other proprietary material due to your use of Our site or to your downloading of any material posted on it, or on any website linked to it.

LINKING TO OUR SITE

You may link to Our home page, provided you do so in a way that is fair and legal and does not damage Our reputation or take advantage of it, but you must not establish a link in such a way as to suggest any form of association, approval or endorsement on Our part where none exists.

You must not establish a link from any website that is not owned by you.

Our site must not be framed on any other site, nor may you create a link to any part of Our site other than the home page. We reserve the right to withdraw linking permission without notice.

If you wish to make any use of material on Our site other than that set out above, please address your request to:

INPS Ltd

The Bread Factory

1a Broughton Street

Battersea

London

SW8 3QJ

LINKS FROM OUR SITE

Where Our site contains links to other sites and resources provided by third parties, these links are provided for your information only and should not be considered as recommendations or endorsements by Us. We have no control over the contents of those sites or resources, and accept no responsibility for them or for any loss or damage that may arise from your use of them.

JURISDICTION AND APPLICABLE LAW

The English courts will have exclusive jurisdiction over any claim arising from, or related to, a visit to Our site [although We retain the right to bring proceedings against you for breach of these conditions in your country of residence or any other relevant country].

These terms of use and any dispute or claim arising out of or in connection with them or their subject matter or formation (including non-contractual disputes or claims) shall be governed by and construed in accordance with the law of England and Wales.

VARIATIONS

We may revise these terms of use at any time by amending this page. You are expected to check this page from time to time to take notice of any changes We made, as they are binding on you. Some of the provisions contained in these terms of use may also be superseded by provisions or notices published elsewhere on Our site.

YOUR CONCERNS

If you have any concerns about material which appears on Our site, please contact the practice where you registered for this service.

Thank you for using Our site.

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