Magentus

CORE CRIS – Vetting Module

IRMER Justifying & Protocolling

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Confidentiality

Introduction

Purpose

Since the introduction of IRMER Regulations all requests received must be vetted by a clinician to confirm that the procedure requested is justified based on the clinical history. This CRIS system enables requests to be justified according to IRMER as a standard feature of the core system.

However the optional Vetting Module allows sites to undertake full Vetting by creating customised examination protocols which can then be assigned to examinations at the time of vetting to facilitate clerical staff in booking appointments, and clinical staff in performing procedures. Protocols are designed to present the users with context specific options based on Exam, Area of the Body and Modality, and can be personalised where applicable using the standard category / folder options. This is a major step towards achieving a paperless workflow.

Audience

This document has been designed to inform users on how to configure and deploy the Vetting Module.

In practice the next step after training will be for the Trust to spend a period of time deciding on new business processes for paperless vetting, and how they plan to implement them. Magentus would recommend a review by modality and patient type to ensure they know how they want all areas / users to function.

They can do this in the Test environment and should have some process mapping as an output.

It is then recommended that the Trust choose one or two modalities to pilot the module (typically MRI / CT) and undertake any end user training required via the Training System. RIS System Managers will then then need to configure the LIVE environment for those Users/ Terminals involved in the module pilot – ahead of rolling out to additional departments and users.

Document Control

Title	CRIS Vetting & Protocolling Module		
Owner	Magentus Training Manager	Date Created	01/09/2009
File Reference	CRIS_CRIB_CM_299_Vetting_Module_MAG_V5.0.docx		
Product Version	2.09.10s2 onwards		

Change History

Issue	Date	Author	Details of Change
V1.0	01/09/2009	David Costin	First Issue
V1.1	01/06/2010	Emma Savage-Mady	Amendments based on software changes in and clarification of functionality.
V1.2	12/07/2010	Emma Savage-Mady	Minor amendment / corrections.
V1.3	16/03/2011	David Costin	Amendments to include system configuration.
V1.4	31/05/2011	David Costin	Amendment to security settings section.
V1.5	04/07/2011	David Costin	Amendment to show version number 2.0910e
V1.6	22/10/2012	Emma Savage-Mady	Minor amendments / corrections and the inclusion of instructions on assigning examinations as requiring vetting and also justifying.
D2.0	21/10/2013	Emma Savage-Mady	Amendments based on 2.09.10p review including amendment to guidance on Activity name from VETPRO to MODVET as all MOD should now be prefixed by MOD for ease of use. Also includes the addition of GENERAL EDIT_VET_FREE_TEXT which was omitted from previous versions and the inclusion of Intro, Purpose and Audience section. Amendments to Status to suggest Standard / No Protocol Req.
V2.0	31/01/2014	Emma Savage-Mady	First Issue for 2.09.10p
V3.0	10/02/2015	Emma Savage-Mady	Review and amendments based on 2.09.10r release which incorporates new functionality including a [Protocol] button, Vetting Groups and a separate Protocols set-up table.
V4.0	25/07/2016	Emma Savage-Mady	Amendments based on new Vetting List Filters from s2 onwards.
V5.0	29/04/2024	Christine Anthony	Update Vetting Priority field as per release Note 2.14.00 & rebranded to Magentus.

Reviewed by		Date	
Authorised by		Date	
Review Date			

CRIS Vetting Module

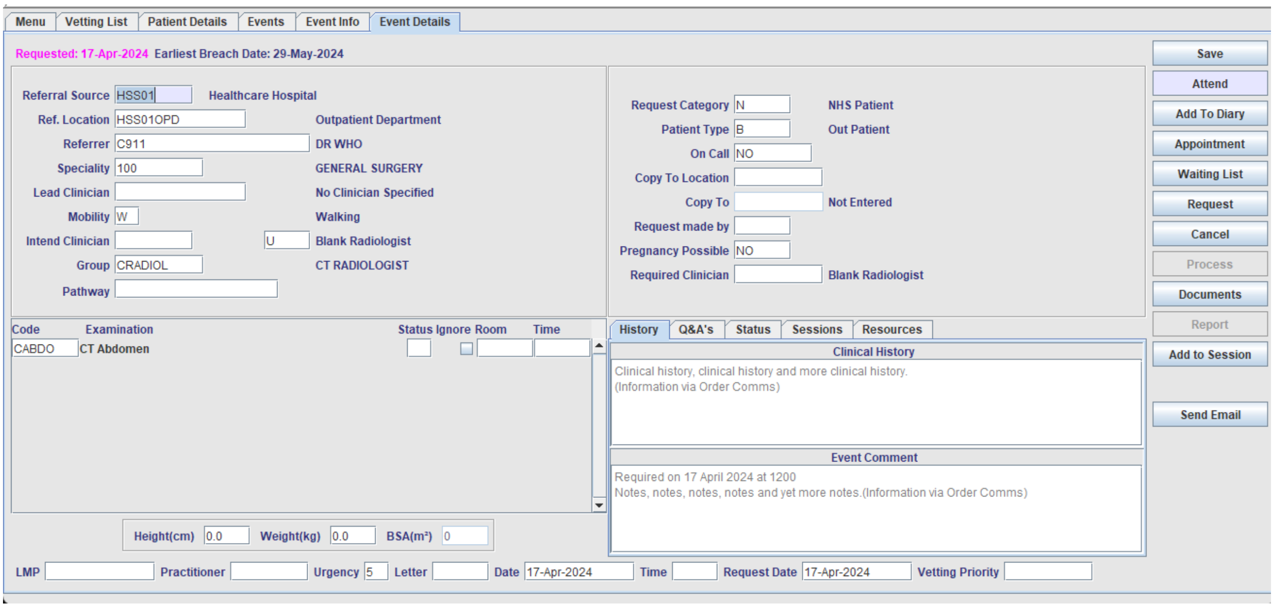
The CRIS Vetting Module has been designed to enable users to record comprehensive vetting information. This builds on **Standard Vetting** which has always allowed clinicians to accept / reject requests according to whether they are justifiable according to IRMER regulations. The Vetting Module enables **Full Vetting** by introducing the ability to also **Protocol requests** by presenting users with context specific options based on Exam, Area of the Body, and Modality, and can be personalised where applicable using the standard category / folder options. This is a major step towards achieving a paperless workflow.

Vetting Mode is essential for all vetting clinicians as when using this mode you will be returned to [Vetting List] as required after completing each request. If you are not in Vetting Mode (i.e. Clerical Staff) you will be returned to the Event Details screen as the default action, to enable you to proceed to click [Add to diary] or [Attend] as applicable.

Creating a Request / Order Received

When a request is received within the department, the first step is to acknowledge it. To do this you should load the patient required by searching for them or entering a relevant patient identifier before clicking the [NEW EVENT] function button and entering the details as specified on the Request Card in the Event Details screen.

Alternatively, if the request originated from any electronic 'Order' you can simply open the Event Details and verify the information before proceeding to 2.



When all basic request card details have been completed, the next step is to enter any relevant supporting information. These sections can be found at the bottom right-hand side of the screen next to the [History / Comments] Tab.

History / Comment	
Clinical History	Enter all clinical history information into this field. Alternatively if the request originated from an electronic request this field may already contain information sent via the interface.
Comments	Enter any relevant additional comments via this field at any stage of the event.

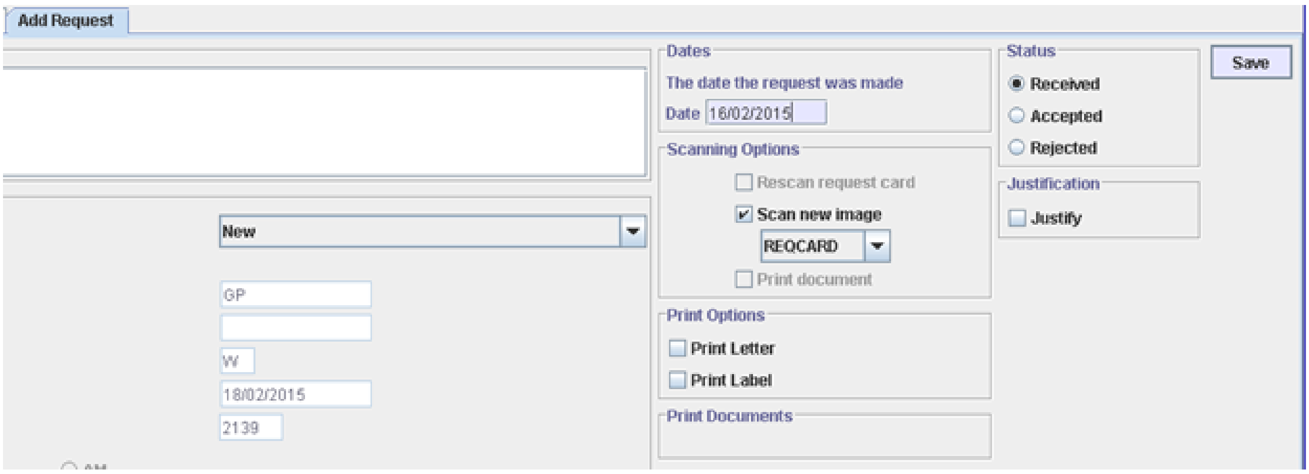
Q&A's	
Reason for Examination	This is used as a continuation of the clinical history and should be used to enter the reasons for requesting / performing the examination if entered via the request card. Alternatively if the request originated from an electronic request this field may already contain information sent via the interface.
Clinical Safety Questions	Used to record the outcome of any Clinical Safety questions if entered via the request card. Alternatively if the request originated from an electronic request this field may already contain information sent via the interface.

To assign the 'Request/ Order' to a specific vetting clinician click on the '**Practitioner'** field at the bottom of the screen and enter the required code, or press [F4] to choose from a list. If you do not wish to assign a vetting clinician simply leave the field blank.

Please note: It is also possible to assign 'Urgency' to the Request at this point such as 5 = Urgent or 7 = 2 Week Wait.

Having done this, click the [Request] function button to proceed to the **Add Request** screen.

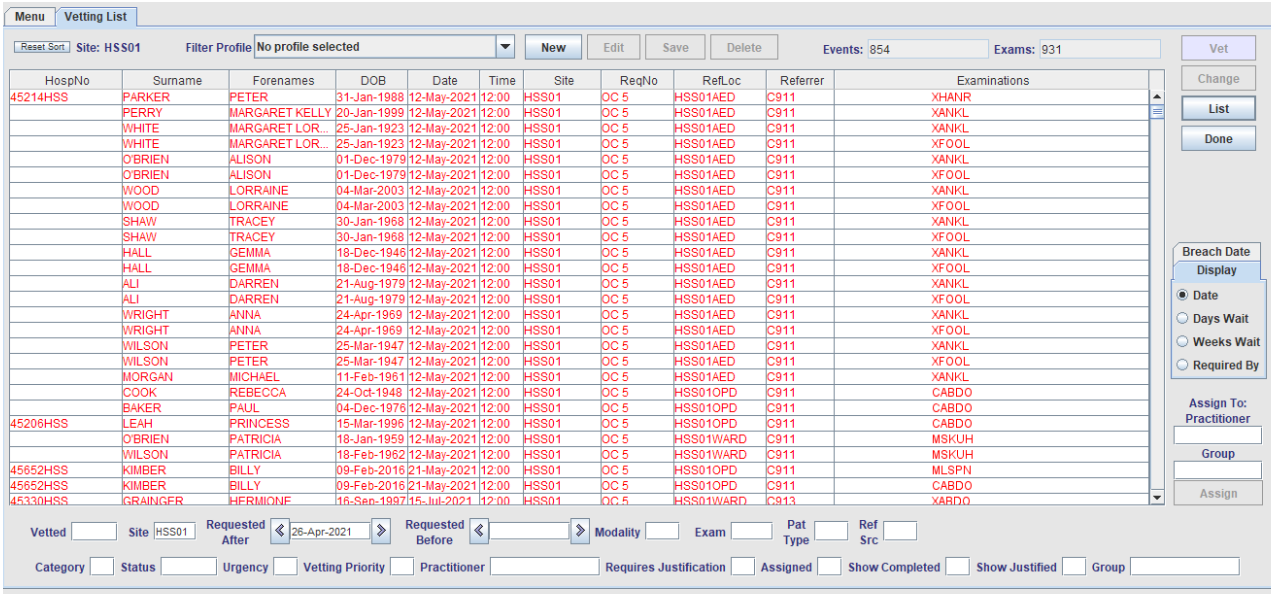
If required change the [Date] to the date the **referral was made**, and tick [Scan Document] if you are scanning request cards. Finally, choose the 'Received' status and click the [Save] function button.



Using the Vetting List

Once the **Vetting Module** is in use Clinicians and Clerical staff can switch to using the [**Vetting List**] as a combined vetting / scheduling worklist which displays **Orders**, **Requests**, **Waiting** / **Planned** and **Appointed** events all in one screen rather than having to work from multiple worklist (i.e. [Orders], [Request List], [Waiting List], [Appointments] etc.

To access the [Vetting List] click the relevant function button on the right-hand side of the 'main CRIS Menu' screen.

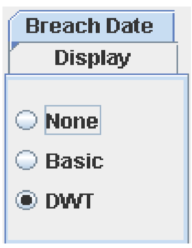


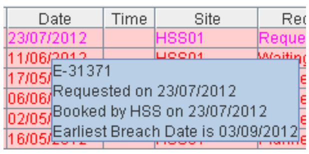
You can then use the following filters to list all relevant 'Orders', 'Requests', 'Waiting' and 'Appointment' awaiting vetting before clicking the [List] function button to display the results.

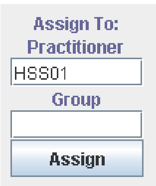
Filter Options	
Vetted	Used to specify which type of requests should be displayed - i.e. Awaiting Vetting, Vetting Accepted etc. Press [F4] to display a list of options.
Site	Used to specify which site you wish to vet requests for – defaults to current site. Leave Blank to see all requests / orders for the Trust.
Requested After Requested Before	Used to specify the required date period – e.g. Requested after 01/01/2013 or before a certain date as applicable.
Modality	Used to filter by a specific modality either by entering the required code or pressing [F4] to choose from a list.
Exam	Used to filter by a specific Examination either by entering the required code or pressing [F4] to choose from a list.
Patient Type	Allows users to specify which type of patients to display i.e. In Patient, Outpatient etc.
Referral Src. (Source)	Can be used to filter by a particular referring location – i.e. requests / orders from High Street Practice, or Healthcare Hospital etc.

Category	Allows users to specify which type of events to display i.e. Appointments, Requests etc.
Status	Allows the category to be filtered further on status type using [F4] prompt which is visible when a Category has been selected.
Urgency	Used to filter the list for a specific urgency category – 5 - Urgent, 3 – Soon etc.
Vetting Priority	Used to filter the list for a specific vetting priority D1 – Emergency, etc.
Practitioner	This filter allows you to display any requests / orders that have been specifically allocated to an individual Clinician – i.e. Personal Worklist. If this filter is left blank it will show unallocated requests.
Requires Justification	This setting should be used to display events which have been marked as requiring justification (i.e. Clinical or IRMER) based on Trust / Consortium policy. Alternatively this field can be left blank to return all events.
Assigned	When this setting is = Y it is used to display events that have been assigned to an individual (i.e. via Practitioner) or to a Group. Selecting = N would display unallocated events.
Show Completed	Clinical Staff who are looking to vet requests should select N = Not Vetted, whilst Clerical Staff looking to schedule appointments should select Y = Vetted.
Show Justified	This filter can be used in conjunction with other fields to ensure that events have been justified during Vetting prior to scheduling appointments. Alternatively when set as = N this will display any events which remain unjustified.
Group	This option is for use in conjunction with the Resource Module – 'Group Functionality' (if deployed) and allows you to display any requests / orders that have been allocated to a Vetting Group – i.e. Resource Group Worklist.

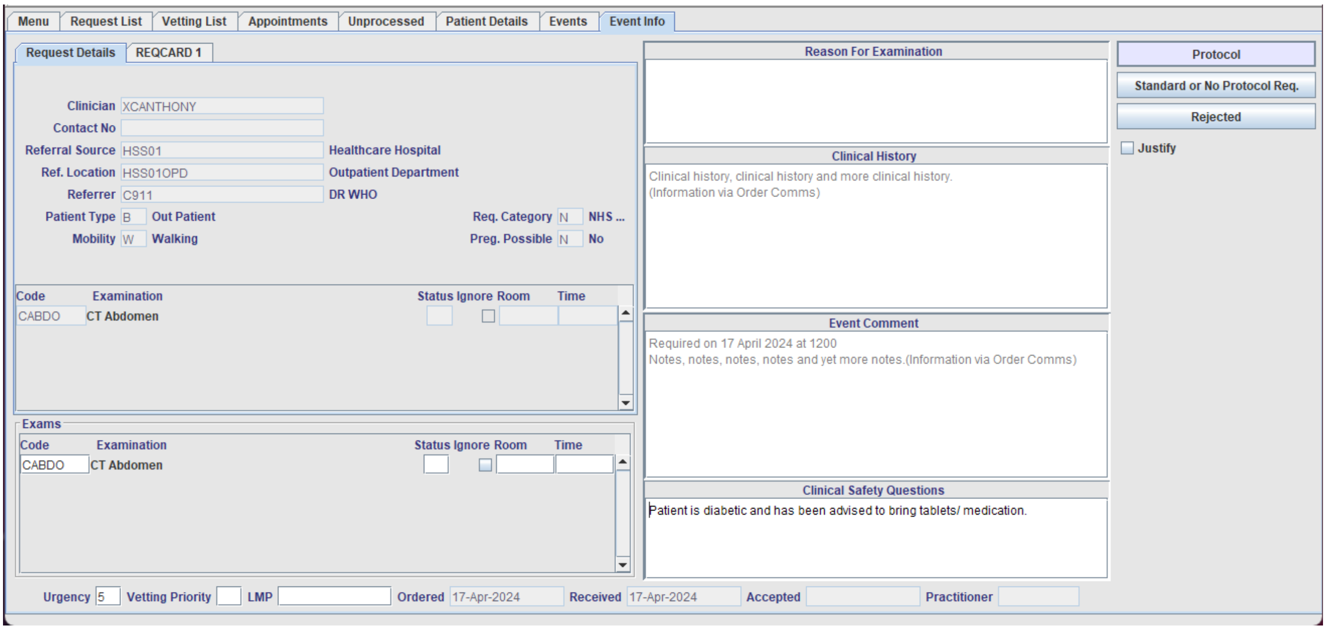
It is also possible to control how the data is displayed on screen using either the [Display] or [Breach Date] options – this is very useful for **clerical staff.** You can also view the actual breach date by hovering over the Date / Days Wait / Weeks Wait / Required by Column.

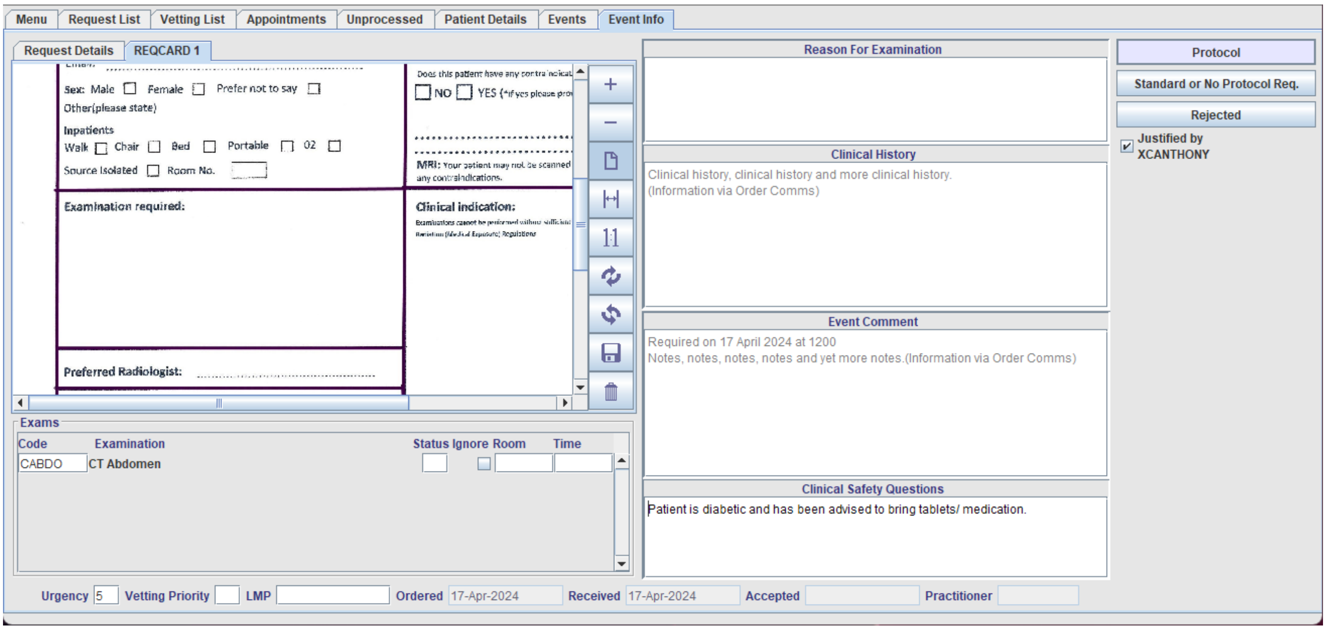




Display Options – Click 'Display' Tab to access this filter	
Date	Displays the request date for the event in ascending / chronological order.
Days Wait	Displays the number of days the event has been waiting according to DWT Guidelines in descending order.
Weeks Wait	Displays the number of weeks the event has been waiting according to DWT Guidelines in descending order.
Required By	Displays the date the event is required by allocated via the vetting details page in ascending / chronological order.
Breach Date Options – Click 'Breach Date' Tab to access this filter	
None	Does not highlight events that are close to exceeding their breach date.
Basic	Highlights events in the displayed colour (pink) which are in danger of exceeding their breach date. The Basic option is not based on DWT Guidelines and does <u>not</u> include clock resets. It is simply activated based on the request date exceeding the maximum no. days specified.
DWT	Highlights events in the displayed colour (pink) which are in danger of exceeding their breach date according to DWT Guidelines and including clock resets. This option is activated based on the request date (i.e. 'Date the Request was Made' for English sites or 'Date Received' for Scottish sites) exceeding the maximum no. days specified minus any clock resets.
Function Buttons	
[Vet]	Takes the Clinician to the Event Info screen to vet the request from an IRMER perspective, ahead of clicking [Vet] to enter the Vetting screen to protocol the request if required or choosing [No Protocol Required] or [Rejected]. Alternatively if the request has already been vetted the Vetting screen will take priority over the Event Info screen.
[Change]	Displays the Event Details Screen to make any required amendments.
[List]	You will need to click this button after applying one, or a combination of filters to display the results.
[Done]	Closes the Vetting module.
[Assign To] 	**Practitioner -** Allows the user to Assign event(s) to a specific clinician. To do this select one, or multiple events using [Shift] or [Ctrl] select then enter the clinician code or select using [F4] via the 'Assign to' field. **Group - *New*** This option is for use in conjunction with the Resource Module (if deployed) enabling events to be assigned to Resource Groups (i.e. CT Radiologists).

To begin vetting you should select the first required event and click the [Protocol] function button. Once the event has been selected the Event Info screen will load to display all relevant information regarding the request and to enable formal vetting. Any scanned documents (i.e. Request Cards) will also be displayed.



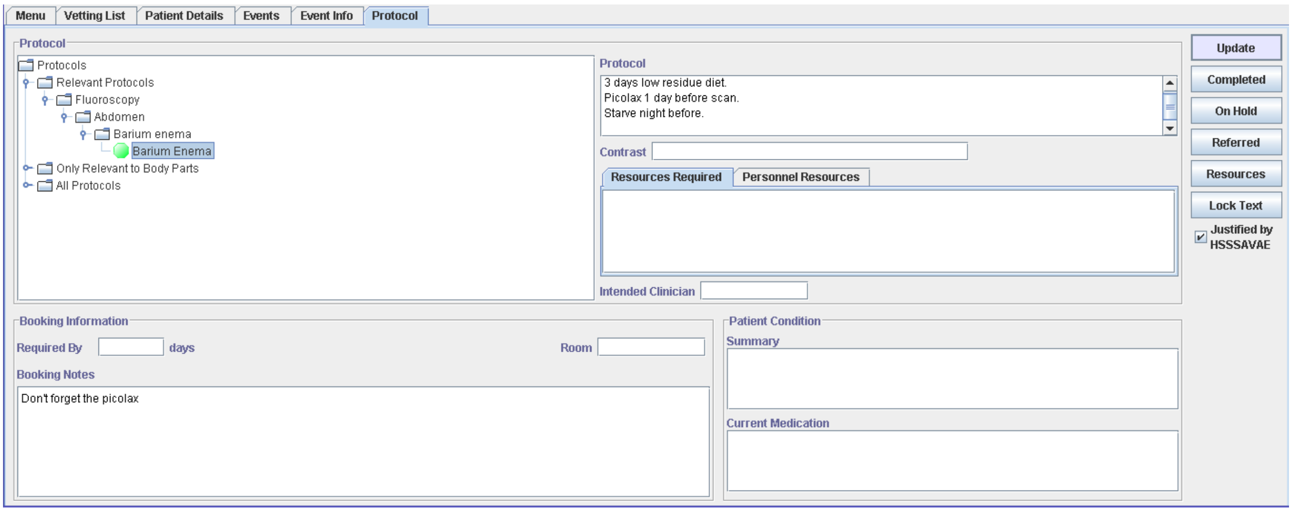


Having reviewed all the relevant details, you should choose one of the following options depending on how you wish to proceed.

Finish Buttons	
[Protocol] - ***New***	If selected will take the user into the **Vetting** screen to **enter protocol details** against the Request (i.e. Required Views, Contrast, and Preparation etc.).
[No Protocol Required]	This option is used to identify that the event does not require vetting.
[Rejected]	This option is used to 'Reject' the request via the cancellation screen.
☐ Justify	This checkbox is designed to allow the clinician to indicate that the event has been justified according to IRMER regulations. **Please note:** If no protocol is required this box should be ticked prior to clicking [No Protocol Required] however if the request will be protocolled the 'Justify' tick box also appears in the subsequent Vetting screen.

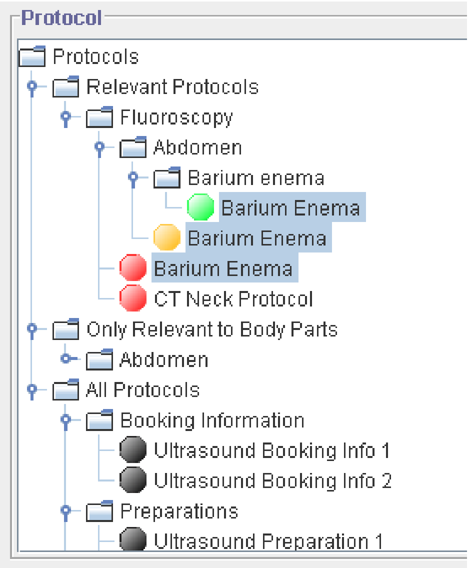
Using the Vetting (Protocols) Screen

The Vetting screen is comprised of several elements which can be entered manually, or auto populated using custom protocols, or a mixture of the two.



Assigning / Creating Protocols

Protocols are used to indicate what specific procedure(s) are required during the scan, and or how the scan / examination should be performed. These can be created by the individual clinician or selected from a list of existing default protocols. The protocols list changes automatically for the type of examination being vetted so the user is presented with 'Relevant Protocols' by examination, body part and modality by default but can also access protocols via the 'Only Relevant to Body Parts' and 'All Protocols' folders.



In addition to all relevant description, protocols also display using a traffic light system to indicate the protocols most appropriate to the examination being vetted.

Protocols matching the examination	Protocols matching the Body Part
Protocols matching the modality	All other Protocols

<table>
<tr><th colspan="2">Protocol</th></tr>
<tr><td colspan="2">This field will either be auto populated upon choosing a relevant 'Protocol' or can be entered manually by the vetting clinician to indicate any specific preparation/protocol information.

Please note: If a protocol has a paperclip symbol within the icon it indicates a linked document which can be accessed by right-clicking and selecting 'View Protocol'.

</td></tr>
<tr><th colspan="2">Contrast</th></tr>
<tr><td colspan="2">This field will also be auto populated upon choosing a relevant 'Protocol' or can be entered manually by choosing from the [F4] prompt list.

Please note: Clinicians should check against alarms before specifying contrast when vetting patient requests.</td></tr>
<tr><th colspan="2">Resources Required & Personnel Resources</th></tr>
<tr><td colspan="2">In the same way as all vetting fields these elements of the module can be auto populated upon selecting a protocol or entered manually.</td></tr>
<tr><td>Resource Required</td><td>Is a free text field used to indicate Radiologist, Radiographer, Nurse, or Anaesthetist etc.</td></tr>
</table>

Personnel Resources	Is a database field which is used in conjunction with the CRIS Resource Management module and is auto populated based on the group of personnel specified as required via the Exams per Hospital Set-up table. This element of the protocol is then used to determine diary availability based on required resources at the time of making an appointment. **Please note:** It is possible to add or amend resources by clicking the [Resources] function button – i.e. to specify an individual or individuals rather than just the generic group.
Intended Clinician	
This field can also be auto populated by a default protocol or is used to specify the clinician who will report the event – i.e. to generate their reporting worklist. This can be amended at any point during the patient journey as required.	
Booking Information	
This area of the vetting module is designed to be viewed by the appointment clerk when making an appointment for the patient. Details can therefore be entered or left blank as applicable.	
Required By	This can be auto populated using a default protocol which utilises a 'Required within' x number of days utility that calculates the 'Required By' date at the time of vetting. Alternatively, users can enter a date manually, press [F4] to display a calendar, or type 10d, 2w, 2m or 2y to auto populate the field.
Room	Used to specify the room the examination should take place in, although can be amended at the time of booking the appointment or as applicable.
Booking Notes	Provides the ability to enter any relevant booking notes, such as patient or clinician preferred appointment slots.
Patient Condition	
Summary	Used to specify the health or status of the patient.
Current Medication	Used to specify any medication the patient is using.

Consequently having reviewed the Event Info and proceeded to the Vetting screen you should select all required protocols and specify any other relevant vetting details for the event.

Please note: It is possible to select multiple protocol elements by holding down the [Ctrl] key and clicking all required items – i.e. for multiple exams or if multiple preps, or resources are required.

Alternatively if no suitable protocol exists you should enter the required details manually. However, Magentus would recommend creating custom protocols where applicable, to save time and effort in for future vetting. See 'Creating Custom Protocols' below for further details.

Once all relevant details have been entered, select one of the following function buttons to complete the process.

Finish Buttons	
[Update]	This button is for use if additional information has been added to an existing vetted request, or to [Update] a request that now has 'Justify' ticked.
[Completed]	This button is used to identify that the clinician is happy to go ahead with the request, and the clinician should ensure additionally ensure that the 'Justify' tick box is selected before proceeding.
[On Hold]	This button is used to identify that the request is on hold pending further information.
[Referred]	This button is used to refer the request to an alternative clinician, either to seek a second opinion of sharing workload.
[Resources]	This button is used to specify Personnel required either as a generic group (i.e. Radiographers, Nurses) or individuals.
[Lock Text]	This feature is designed to prevent any manually entered text from being removed, should a different / additional protocol be selected after a user's manual adjustments. (i.e. If you choose one protocol, then would like to add another protocol, choose lock text in between selections).
☐ Justify	This checkbox is designed to allow the clinician to indicate that the event has been justified according to IRMER regulations.

Vetting Icons

The vetting module utilises new event icons to distinguish between different vetting statuses as follows:

Vetting Icons		
Vetting Not Required		Any examination that does not require vetting is automatically assigned the vetting accepted icon to distinguish these events from others which still require vetting.
Vetting Accepted		Indicates that the event has been vetted and accepted via the vetting module.
Vetting on Hold		Indicates that the event has been placed on hold pending further information.
Vetting Referred		Indicates that the event has been referred for a second opinion.
Vetting Rejected		Indicates that the event has been rejected and will not go ahead.
Justified	J	Indicates that the event has been Justified. **Please note:** If the event has been vetted this icon will show behind the appropriate vetting icon resulting in justified requests having a green background.

Amending and Viewing Vetting Details

Viewing or Amending a Record via Event Details

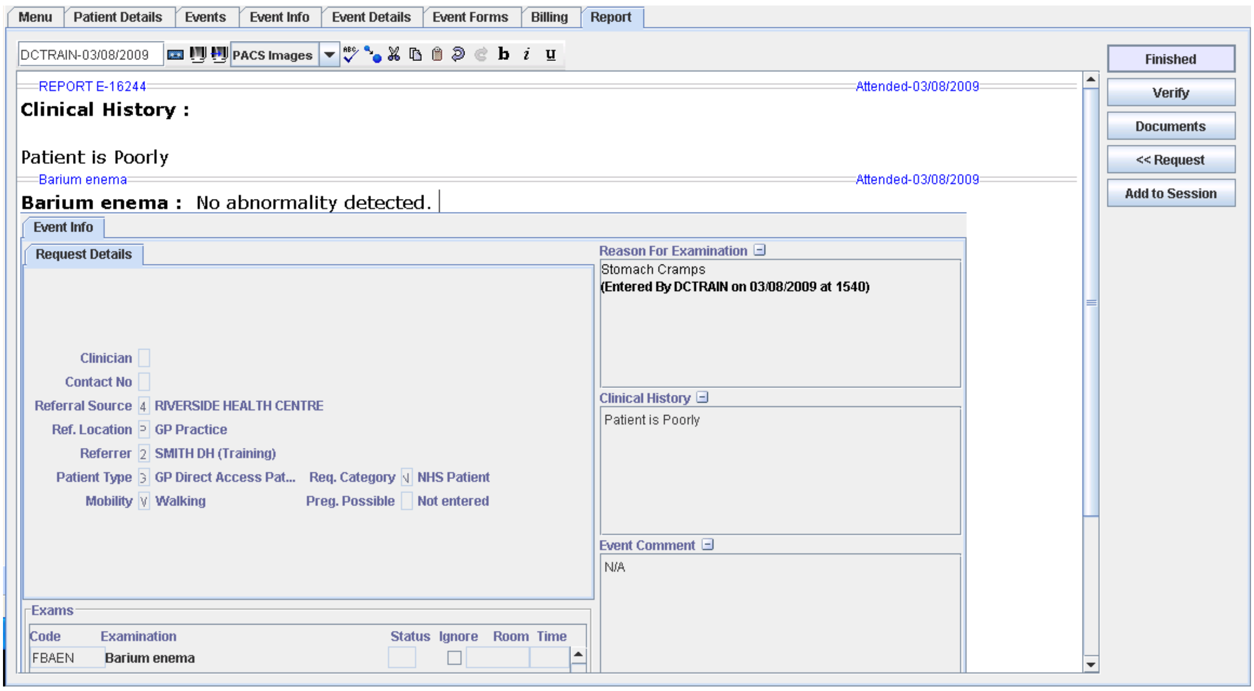
It is possible to view or amend Vetting details at any time highlighting the record via the patient Event screen and choosing [Vet]. Full details of the Event can be viewed via the Event Info Screen, and any amendments can be saved by clicking the [Update] function button. Alternatively if only viewing details you should press [F5] to clear the record on completion.

Additionally, vetting details can always be viewed whenever the Event Info screen is present during any stage of requesting, appointing, attending, processing or reporting stages.

Please note: It is possible for clinicians to JUSTIFY A RECORD after the fact by right clicking the record on the Event screen and selecting 'Justify' from the resulting menu.

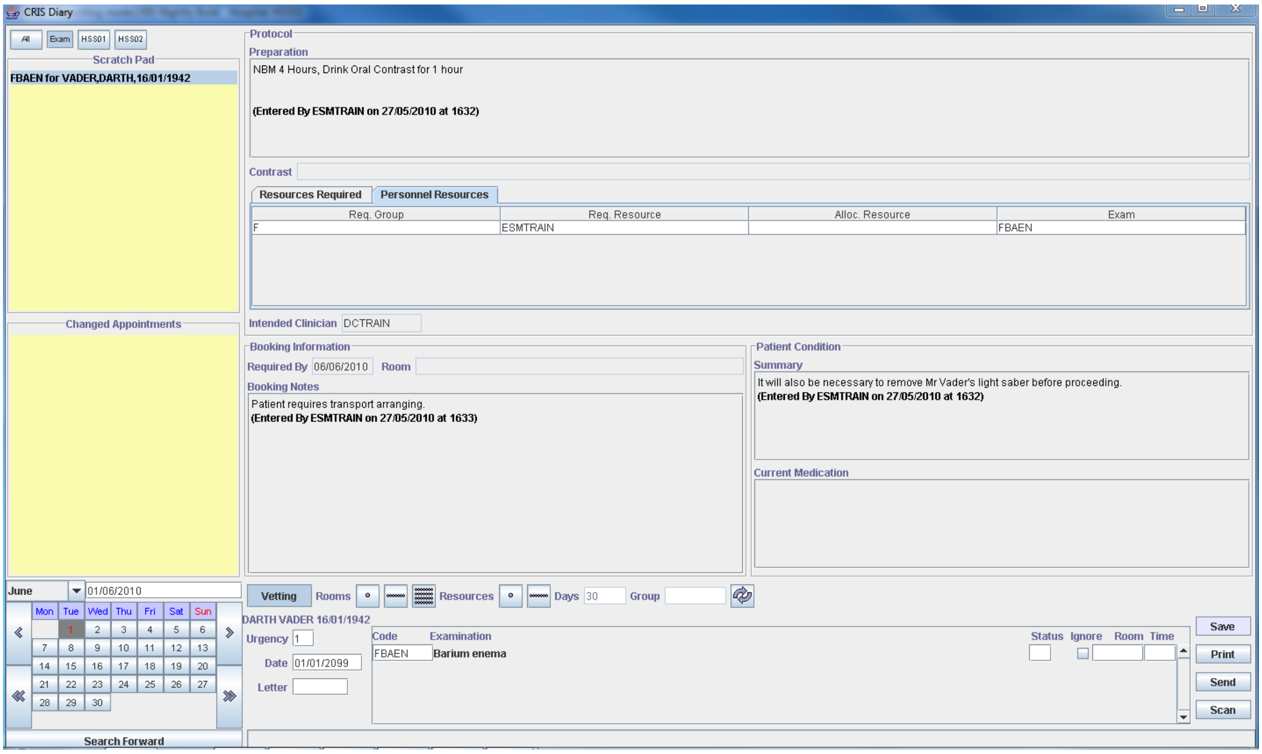
Report Editor

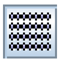
Once the vetting procedure has been completed, it is possible to view the 'Event Info' Tab via the Report screen, by clicking the [Request] function button to enable this feature. This will remain visible for all subsequent reports until the [Request] button is selected again to disable this feature.



Diary Viewer

It is also possible to view vetting information via the diary viewer by clicking the [Vetting] function button in the Patient Details pane for the selected patient. This will only show vetting information for exams that have been marked as 'Require Vetting' and have been vetted via CRIS Vetting Module otherwise no details will be displayed.



Having reviewed the vetting details you should click the day  week  or month  view to return to the standard diary viewer.

Vetting Module Access Settings

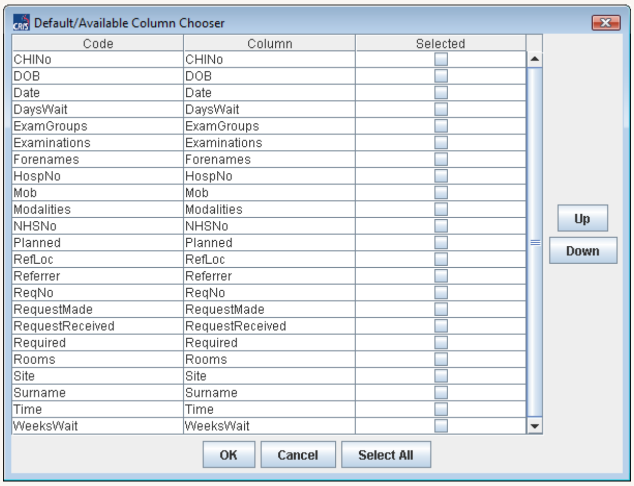
CRIS Licenses

A valid trust license will be required for the CRIS Vetting Module. You can check if a valid Vetting Module Code has already been applied to the system via **TABLES > SYSTEM > LICENSES.** In the event that the license is not present, and you have purchased the 'Vetting Module' or the module is 'Inclusive' to your CRIS deployment this can be requested via your Client Manager or the Helpdesk.

XR Settings

The following XR setting are designed for use with the Vetting Module. These settings can be applied at XRTR (Trust), XRS (Site) or XRT (Terminal) Level as applicable via **TABLES > SYSTEM > XR SETTINGS.**

Setting	Description
VETTING.ModuleAvailable	Specifies if the vetting module is available on a terminal.

RECEPT.RefreshVettingList	This setting will allow the vetting list to automatically refresh every time the screen is cleared.
GENERAL.EditVetText	This setting prevents users from editing the text associated with events via the Vetting screen.
VETTING.TimeframeDays	This setting allows system managers to specify the number of days an event should be vetted before the breach date.
GENERAL.UseVettingPriority	The ability to be able to order and filter by 'Vetting Priority' so customers can prioritise follow on activities according to the new NHS Waiting List guidance and not the original booking urgency.
Optional Breach Date Settings	
GENERAL.BreachDateCalculation	Enables the display of the breach date on patient events and hover help over date fields.
GENERAL.BreachDateCalculation Type	Allows users to specify which breach date calculation to display. i.e. English or Scottish styles.
STATS.WaitingTimeClockStartDate	The date used when starting the waiting time either Request Made or Request Received.
EVENTLIST.Vetting	This setting will allow system managers to specify which columns of information to be displayed on any of the CRIS work lists (if required).  To add an additional column to an existing work list, tick the selected box for the item you wish to display.

Security Settings

The following security settings are required to access the Vetting Module. Magentus recommend that the Trust create a new **Activity** Group called ***MODVET = Vetting and Protocoling Module*** and new **Roles** called **RADIOGV,** and **RADIOLV** which have RADIOG and RADIOL as their parent groups. You should then assign MODVET Activities to both new ROLES. This can be undertaken via **TABLES > PEOPLE > SECURITY SETTINGS.**

In this way during a pilot phase of the Vetting Module each individual user can just have the MODVET Activity assigned to their existing user IDs via Staff Tables and [Edit Group]. Then when the Trust / Site are ready to go live with the Vetting Module the relevant users can be assigned RADIOGV or RADIOLV instead of their old roles.

The use of Activities rather than simply adding security settings to each role makes it much easier update the Vetting Module with any new security settings which are associated with future module development – i.e. The scheduled development of security settings which will in future restrict who can and cannot create, edit and delete Protocol templates.

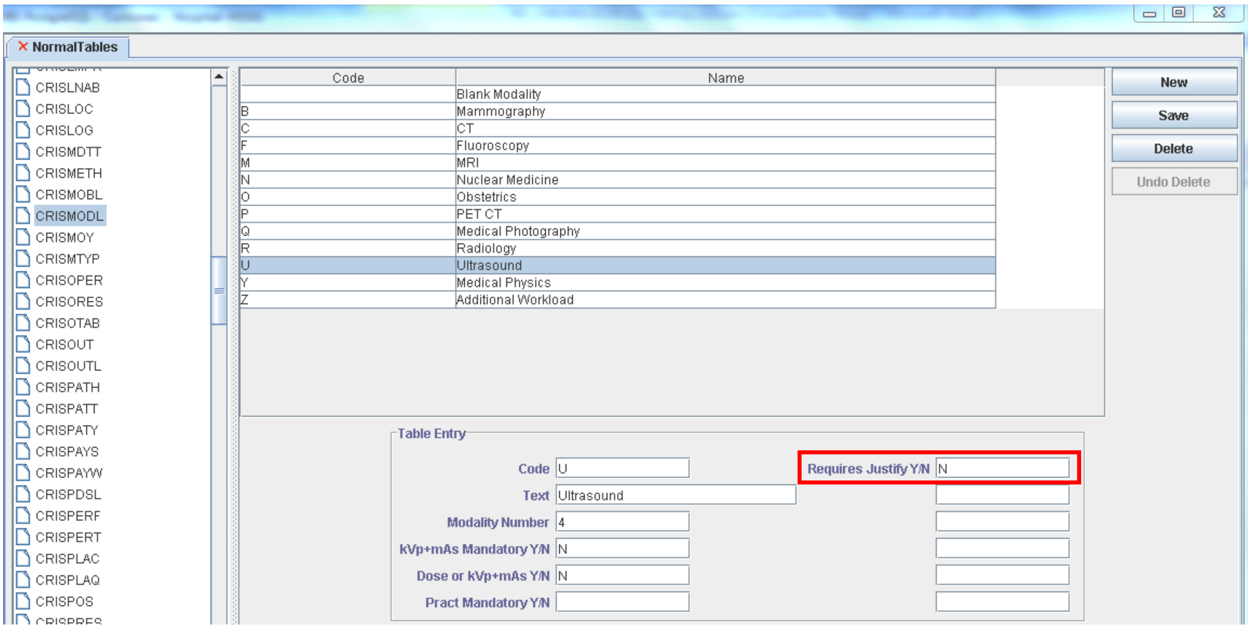
Section	Item	Description
The following settings apply to the new Vetting Protocol Set-up Table:		
GENERAL	MANAGE_VET_GRP	Vetting List Management – Allows users to edit protocols assigned to a specific Resource Vetting Group via the Protocol Set-up Table.
GENERAL	MANAGE_VET_STE	Vetting List Management – Allows users to edit protocols assigned to a specific Site / Hospital via the Protocol Set-up Table.
GENERAL	MANAGE_VET_SYS	Vetting List Management – System Wide – This setting will override all others, giving access to edit all levels via Protocol Set-up Table.
GENERAL	MANAGE_VET_TR	Vetting List Management – Allows users to edit protocols assigned to a specific Trust via the Protocol Set-up Table.
When creating a protocol the default ownership will be the highest level to which the user has permission to manage. A user may change ownership of a protocol, or category to any of the levels which that user also has permission to manage. It is only possible to create or delete Categories (Folders) at Trust or System level, however lower levels (Site and Group) can still assign and remove protocols within the categories just not manage the categories themselves. The below settings are applicable to the CRIS Vetting Module itself:		
GENERAL	MANAGE_VETTING	Allows users to manage the Vetting list – i.e. Assign events etc.
GENERAL	CHANGE_VETTING	Allows users to make amendments to previously vetted events.
GENERAL	JUSTIFY	Allows users to Justify an event from the applicable tick boxes.
GENERAL	EDIT_VET_TEXT	Allows users to edit anyone's free text **– *This is not recommended except for System Managers.***
VIEWS	VETTING	Allows users to view the vetting information throughout the system.

Vetting Module Table Configuration

Specifying Which Modalities Require Justification

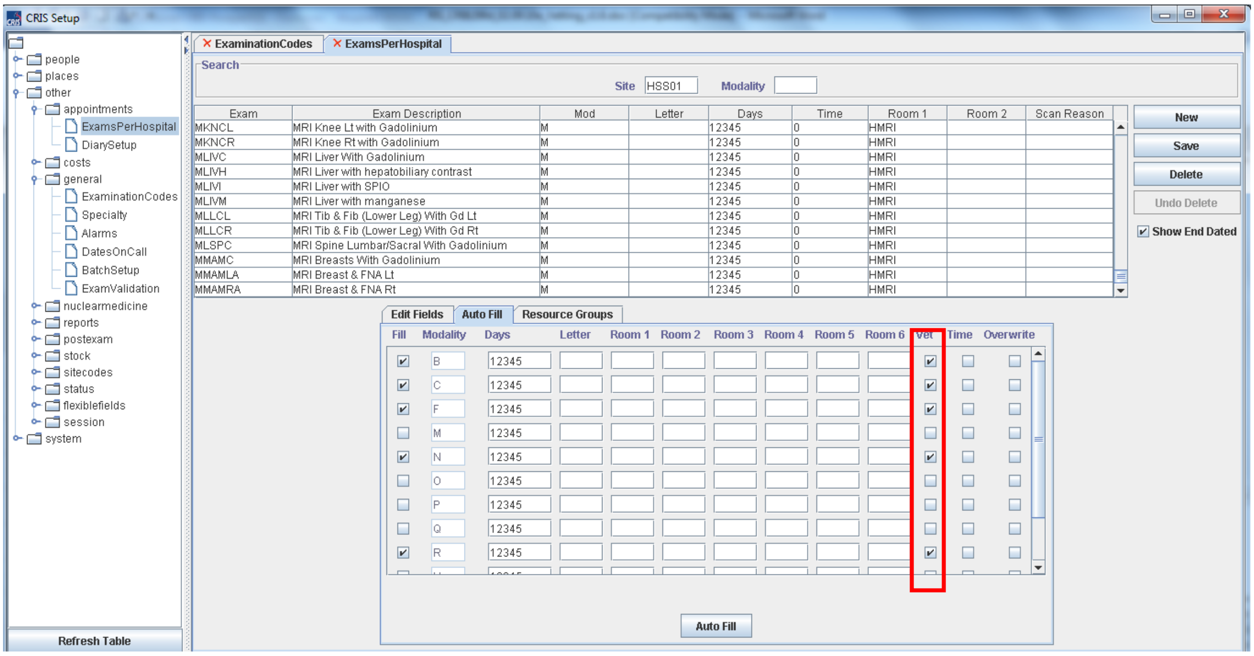
It will also be necessary to specify **which modalities require justification** based on IRMER regulations and those that do not via **TABLES > SYSTEM > NORMAL TABLES > CRISMODL.**

You should enter Y or N via the 'Requires Justify' field for each relevant modality. If the Modality is left blank or set to N – any associated examinations are automatically marked as ready to proceed using the same icon as a Vetted request – i.e. if the event has a vetted icon, you can proceed to book an appointment or perform the examination.



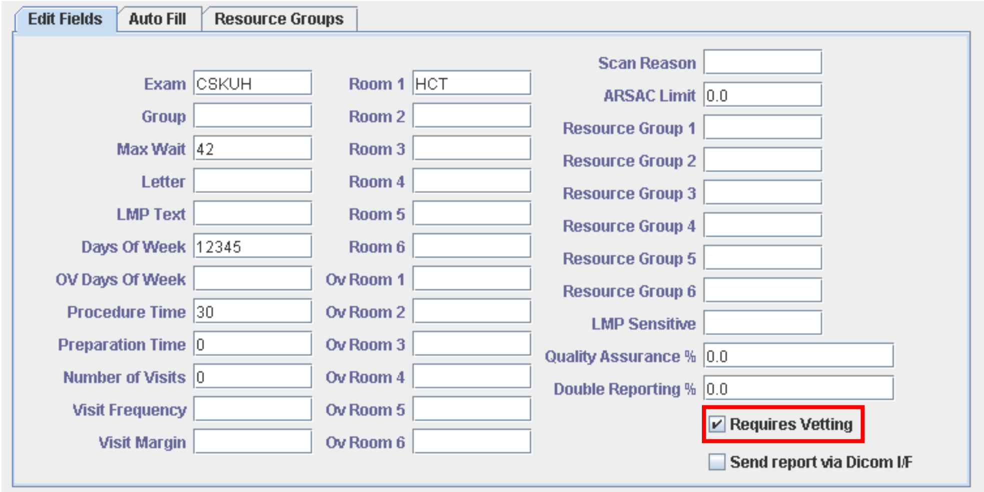
Assigning Modalities / Exams Which Require Vetting

It will be also necessary to specify **which modalities require vetting** via **TABLES > OTHER > APPOINTMENTS > EXAMS PER HOSPITAL** as this will control which exams are outstanding for vetting.



Selecting the 'Autofill' tab will allow you to tick all modalities which require vetting, then click [Auto Fill] to action this followed by [Save] to commit the changes. You should not use Overwrite unless you genuinely wish to overwrite all other details. Without overwrite ticked any changes are appended to existing values.

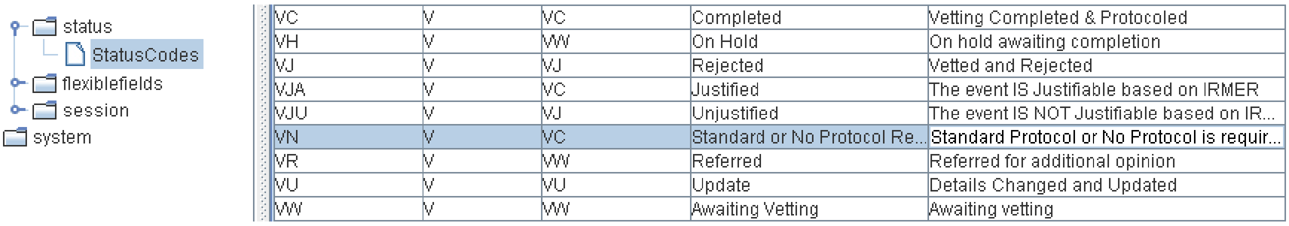
Alternatively, if a minority of exams within a modality should be marked as "Requires Vetting" you can just individually tick these as applicable. Conversely, if a minority of exams do not need to be marked as "Require vetting" you can use autofill to populate the majority, then untick "Requires Vetting" from any relevant individual exams.



Any exams flagged as not applicable to vetting are automatically marked as ready to proceed using the same icon as a Vetted request – i.e. if the event has a vetted icon you can proceed to book an appointment or perform the examination.

Vetting Status Codes

The CRIS Status Codes Table via **TABLES > OTHER > STATUS** allows customised Status codes with associated text on Buttons and via Hover help. This is particularly useful to the VETTING Status codes and



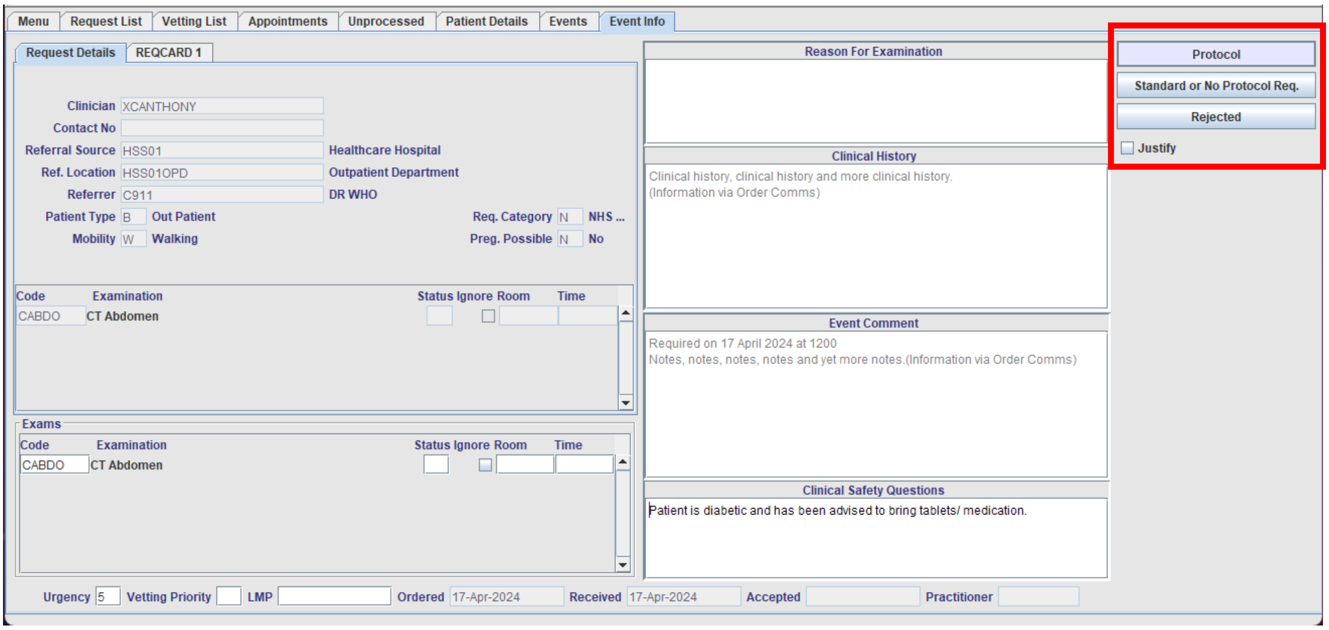
VC	V	VC	Completed	Vetting Completed & Protocoled
VH	V	WW	On Hold	On hold awaiting completion
VJ	V	VJ	Rejected	Vetted and Rejected
VJA	V	VC	Justified	The event IS Justifiable based on IRMER
VJU	V	VJ	Unjustified	The event IS NOT Justifiable based on IR...
VN	V	VC	Standard or No Protocol Re...	Standard Protocol or No Protocol is requir...
VR	V	WW	Referred	Referred for additional opinion
VU	V	VU	Update	Details Changed and Updated
WW	V	WW	Awaiting Vetting	Awaiting vetting

Magentus recommends that the following Status Codes are in place prior to deploying the Vetting Module.

This can be undertaken via TABLES > OTHER TABLES > STATUS and editing the VN Code from 'Not Required' to 'Standard / No Protocol Req.' as follows:

The other statuses 'long description' can be amended if required to customise the hover help seen by users when via relevant function buttons.

Configuring the VN status code as recommended above will result in relabelling the button to "Standard or No Protocol Req." via the Vetting > Event Info screen as follows:



Please note: The Status Codes Tables is System-wide, so it will be necessary to agree any changes with all Trusts in Consortium deployments.

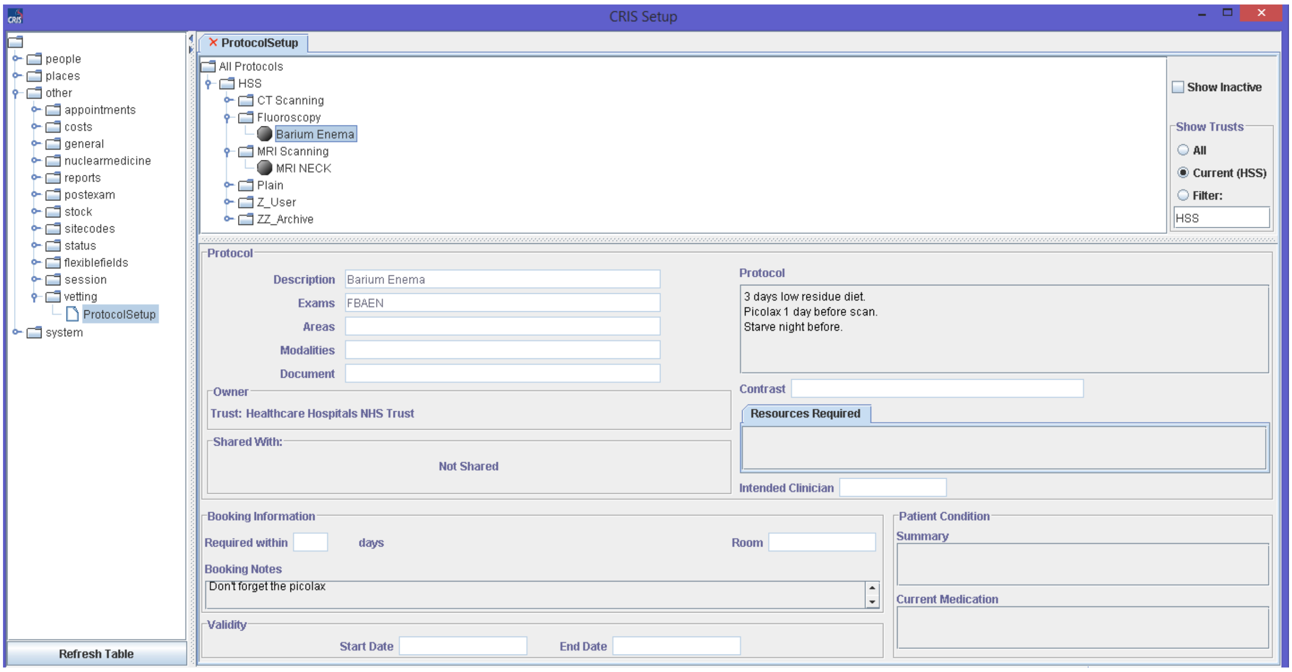
Creating Custom Protocols

The CRIS Vetting Module has been designed to allow system administrators and vetting clinicians to create and maintain vetting protocols covering all elements pertinent to performing procedures – i.e. Preparations and contrasts, required resources, specific booking information and patient conditions. Where applicable all the above elements can be created as combined protocols, in addition to individual items which can then be selected as required using the [Ctrl] key which will enable you to multi select any required elements.

New – Creating Protocols have now been moved from the event level Vetting Screen to a new Protocols Set-up Table via **TABLES > TABLES > VETTING** to facilitate more effective deployment and management of vetting protocols.

In Consortium models enabling **GENERAL.MANAGE_VET_SYS = Y** will display the 'Show Trusts' filtering and to view all Protocols throughout the Consortium, however if **GENERAL.MANAGE_VET_SYS = N** the filter will not be displayed, and you will only be able to view / edit protocols relevant to your own Trust.

Creating Categories and Protocols



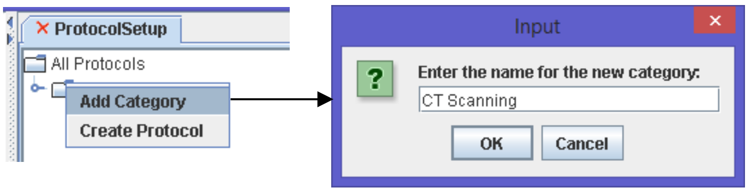
Creating Protocol Categories

Begin by creating any required new Categories, and Subcategories. Categories are effectively folders used to classify types of 'Protocols' (i.e. CT, MRI, US etc.) both for generic use and for individual use (i.e. ESM Protocols).

Once a category exists, it is then also possible to create subcategories within the parent category, ahead of generating protocol items or to add categories to existing ones. It is also possible to drag and drop protocol into alternative categories as required.

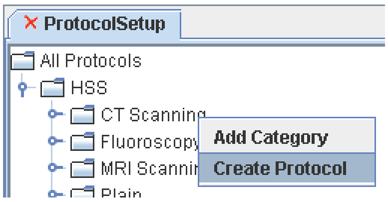
Please note: If creating User specific categories, it is recommended that you prefix the parent category name with your reporting code (i.e. C12345_Dr Savage-Mady Protocols).

To create a category right click either the Trust folder or 'All Protocols' and select 'Add Category'.

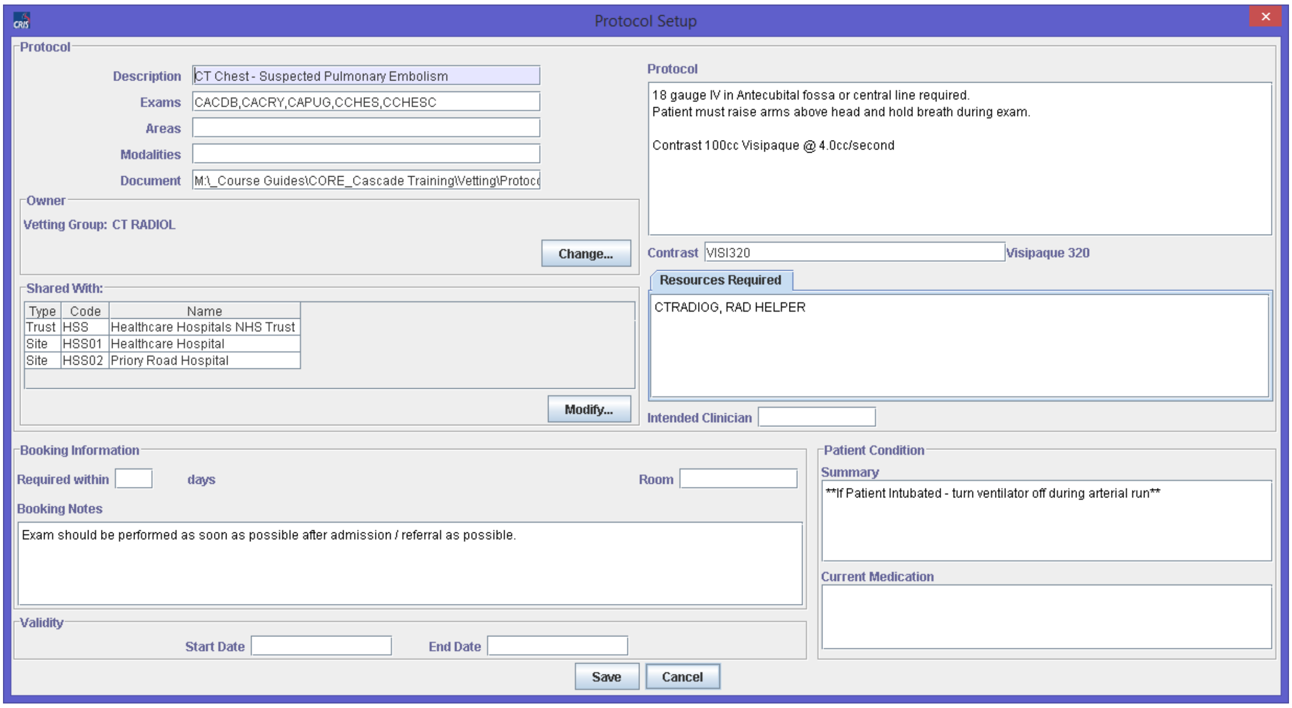


Creating Protocols

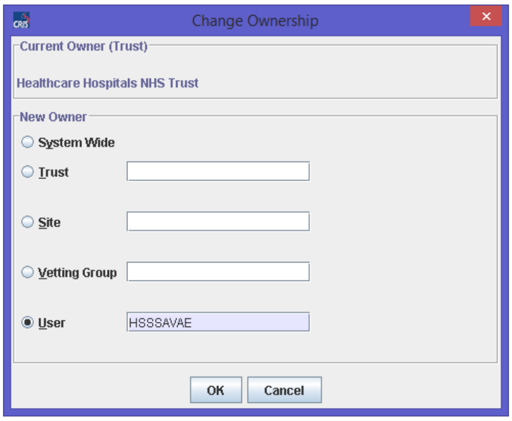
Having identified a destination category right-click and choose 'Create Protocol' from the resulting menu.



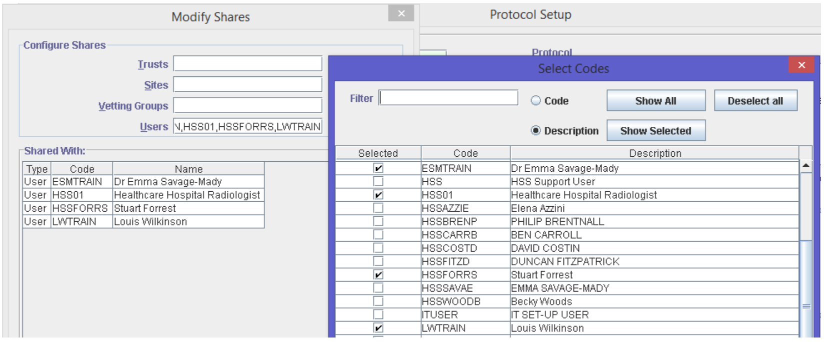
This will display the 'Protocol Set-up' function as follows, and you should complete the template as required:



Protocol Setup	
Description	Enter an appropriate description to identify the type of protocol being created – (i.e. CT Chest – Pulmonary Embolism). **This field is obligatory.** **Please note:** Magentus recommend prefixing any SITE SPECIFIC PROTOCOLS with NACS Code and USER SPECIFIC with C code or registration number for ease of identification in lists.
Exams	Enter any examinations applicable to the protocol. This can be entered by typing the examination codes separated by commas, or by pressing the [F4] prompt key and selecting from a list of available exams. Completing this field ensures that the protocol is displayed accordingly when a valid examination is being vetted, but it is not obligatory.
Areas	Enter the relevant area of the body for the exam / protocol if applicable. Press [F4] to choose from a list of available options. Completing this field ensures that this protocol is associated with the 'relevant to Body Parts' folder, but it is not obligatory.

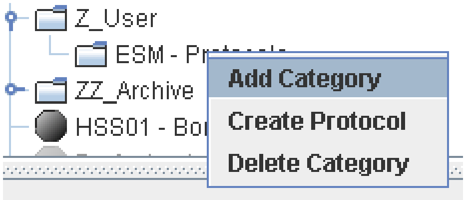
<table>
<tr><td>Modalities</td><td colspan="2">Enter the modality associated with the protocol as applicable. Completing this field ensures the protocol is displayed in the appropriate modality folder, but it is not obligatory.</td></tr>
<tr><td>Document</td><td colspan="2">Press [F4] or double click this field to browse for any supporting documentation which should be associated with the protocols. This field is not obligatory.</td></tr>
<tr><td rowspan="6">Owner - New</td><td colspan="2">The Vetting module has been enhanced to allow system managers to define the owner of protocols to determine the order in which protocols appear and are prioritised.

</td></tr>
<tr><td>System Wide</td><td>This option is only available if GENERAL.MANAGE_VET_SYS = Y is enabled. This option allows protocols to be created and shared System Wide (i.e. Consortium wide as applicable)</td></tr>
<tr><td>Trust</td><td>Use this function to enable Trust wide protocols only viewable within the current Trust except if the protocol is also ‘Shared’.</td></tr>
<tr><td>Site</td><td>This option allows the system manager to create site specific protocols which will only be displayed when vetting at each relevant Hospital except if the protocol is also ‘Shared’.</td></tr>
<tr><td>Vetting Group</td><td>This function enables protocols to be shared with a group of Vetting Clinicians except if the protocol is also ‘Shared’.

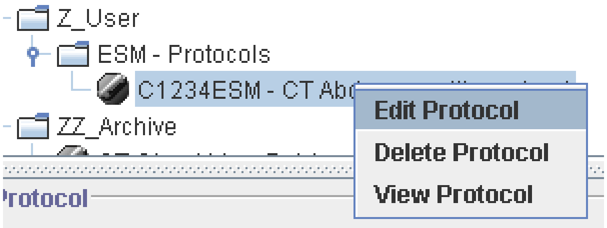
Please note: This option requires use of the Resources Module.</td></tr>
<tr><td>User</td><td>This option allows system managers to create user specific protocols which will take priority over other protocols presented to the user via the Vetting screen except if the protocol is also ‘Shared’.</td></tr>
</table>

Shared with - ***New***	The 'Shared with' function enable RIS system managers to share protocol templates with other Trusts, Sites, Vetting Groups or Users as applicable. This may be useful if the Resource Module is not deployed and the system manager would like to share a protocol template with several users (i.e. All CT Radiologists – C12345,C12346,C12347,C12348 etc.) or for 'Consortiums User groups' to create central protocols which can be shared with specific Trusts, or sites.  When vetting an event, only those protocol templates which are in the events Trust, Site and logged in User hierarchy will be available to be assigned.
Required Within – Days	Enter the number of days from the date of the vetting the examination should be performed. This will then auto complete the 'Required By' field in the Vetting screen and be amended as necessary. This field is not obligatory.
Room	Room the examination should be performed in. This can be amended via the Vetting screen if required. This field is not obligatory.
Booking Notes	Enter any relevant booking notes, or items such as preferred session days, follow up appointment dates etc. This field is not obligatory.
Preparation	Enter any specific preparation, protocols or instructions for performing the procedure. This field is not obligatory.
Contrast	Enter the contrast(s) required for the examination by pressing [F4] and selecting one or more contrast drugs. **Please note:** Clinicians should check against alarms before specifying contrast when vetting patient requests.
Resources Required	Used to specify staff required for the scan – i.e. Anaesthetist, Nurse etc. This field is not obligatory.
Intended Clinician	Used to identify a specific clinician for reporting after the images have been generated. If this field is left blank the request will be unallocated. This field is not obligatory.
Patient Condition Summary	Unlikely to be used as a generic protocol more typically for use on a patient by patient basis to specify any issues relevant to health or status of the patient. This field is not obligatory.
Current Medication	Used to specify any issues relevant to medication – (i.e. If patient is diabetic, please bring tablets or insulin).
Start Date - ***New***	

End Date - ***New***	These new functions enable system managers to activate protocols from a particular date and retire (End Date) protocols when no longer required. Leaving both fields blank will immediately activate the new protocol. **Please note:** If you enter dates into either field the protocols will no longer be visible in the set-up table by default. To display inactive protocols tick 'Show Inactive' via the Protocol Set-up table.
[Save] function button	Saves the new protocol or any changes made to an existing protocol.
[Cancel] function button	Closes the 'Protocol Setup' screen without saving.

Editing Categories & Protocols





Protocol Options	
Add Category	This will allow the user to create a custom categories and subcategories as which will then be available to all users.
Create Protocol	This will open a new window allowing the user to create a custom protocol that will be added to the main list once it has been saved.
Delete Category	Housekeeping tool to clear any unwanted protocols.
Edit Protocol	Utility to facilitate amendments to existing protocols.
View Protocol	This option is only available if the protocol has a document associated with it. If so then the associated document will be opened for viewing.