



Viso

# HCP Dashboard

Instruction Manual

# Table of Contents

<b>Introduction.....</b>	<b>3</b>
<b>Initial Settings .....</b>	<b>7</b>
Registering Your Practice for Viso .....	7
Add Users .....	9
<b>Patient Enrolment.....</b>	<b>11</b>
Enrol a Patient.....	11
Complete Enrolment .....	14
Steps for Creating a Titration Programme .....	16
More About Creating Titration Plan .....	21
<b>Daily Use .....</b>	<b>25</b>
Monitoring the Viso Dashboard .....	25
Patient Dashboard Overview .....	27
Patient Action Cards .....	28
Edit Patient Information.....	29
View Detailed Monitoring Overview .....	30
Request Patient's Contact.....	32
Manage Blood and Urine Tests.....	32
Manage Specialist Review Request.....	33
<b>Managing Programmes.....</b>	<b>36</b>
Validated Treatment Programmes .....	36
<b>Managing Users .....</b>	<b>38</b>
Edit Your Own Profile .....	38
Edit Users.....	38
Delete Users .....	40
<b>FAQ .....</b>	<b>42</b>
Registration, Log-in and System Errors .....	42
Managing patients in Viso .....	44
The Review Cycle in Hypertension Plus .....	45
Programme in Viso.....	48
Managing Users .....	49
<b>About Viso.....</b>	<b>50</b>

# Introduction

This instruction manual will guide you through the key features and functionalities of the Clinician dashboard on the Viso platform. This manual is intended for health care providers only.

Please refer to this manual when you have questions or read our "FAQ [▶ 42]" section for more information.

If you have any questions or concerns that are not answered by this manual, contact OMRON Customer Service.

## What is Viso?

Viso is the OMRON multi-disease management platform for remote patient monitoring. Viso facilitates the Review process and optimizes it with retrospective health-monitoring and daily/regular deterioration checks to managing your Patients Health and/or chronic Disease for earlier detection and better Outcomes. Viso support in QOF/IIF processes, alerts in Patient Reported deterioration, creates follow-up in Treatment Plans and regular blood/urine screening, shares workflow and decision making; to reduce top-down workload and offers Patient-personalized or Practice-specific indication-based Markers.

## Intended Use and Intended User

The OMRON multi-disease management platform, Viso, is intended to support remote patient management and is intended to facilitate remote population health management, improving outcomes and increasing efficiency in primary care.

Viso is a primary care remote management and hypertension medication titration platform. Based on workflow algorithms proven in randomized controlled trials through the TASMIN studies, and decision-support tools compliant with NICE guidelines, Viso supports improvement of outcomes and increase of efficiency of hypertension management.

Viso communicates patients' home entered data to their HCP and it provides HCPs with patient personalised recommendations within the United Kingdom related to the treatment strategy based on NICE guideline NG136. (Published date: 28 August 2019). According to NICE guideline NG136, the recommendations on measuring blood pressure and diagnosing hypertension in this guideline apply to all adults (over 18 years old), including those with type 2 diabetes.

Intended Users:

### 1. HCPs

The platform can be adapted to specific disease management protocols depending on the self-monitoring parameters as set per the configuration of the HCPs during or after patient enrolment. The platform will alert HCP's and prompt patients to seek clinical attention when these self-monitored parameters are considered out of limits.

- Provides patient personalised recommendations to HCPs related to the patient's management plan, which are based on the patient entered home data and communicates the HCP's decision to the patient.
- Healthcare professionals can register patients into the Viso HCP Dashboard, but medical practices for medication treatment relating to diagnosis and prescription must be performed by qualified professionals.

### 2. Patients

The Viso app informs patients of HCP's decision regarding the patient's medication plan. The Viso app communicates patients' home entered data to their HCP.

The Viso app is iOS and Android compatible for patients of HCPs with basic mobile literacy, who can perform basic operation such as set up internet connection, download and sign up for application, text input, etc.

There is no additional facilities requirement to operate this app.



## WARNING

Viso is intended for adults only (18 years and over).

Some programmes on Viso are NOT suitable for patients with certain conditions. Clinical judgement applies considering individual risk factors such as:

- Neurological conditions (Parkinson's, Alzheimer's, Dementia etc.),
- Mental illness (Depression, anxiety etc.),
- Pregnancy,
- Learning disability,
- Caring responsibilities, and/or
- Deprivation.

Please check each programme's warnings in the information icon next to each programme's name before enrolling a patient into it.

Always consider whether your patient may require further help or guidance on engaging with Viso, and the contraindications and potential ineligibility of enrolling a patient in multiple programmes.

---

## Validated Monitoring Devices

Refer to: <https://bihsoc.org/bp-monitors/for-home-use/>

---

## Compatible OS and Browser

Viso will work with the following environment:

OS: Windows 10 or later

Browser: Google Chrome version 85 or later / Microsoft Edge version 86 or later

Browser zoom: 100% or 200%

Screen resolution: 1920 x 1080

Viso may not perform properly in environments other than those listed above. Please make sure to use the supported OS and browser environments.

---

## Installation

You do not need to install any hardware or software to use Viso via web browser.

---

## Start-up procedure

You can start to using Viso by signing in our service platform weblink on browser.

---

## Shutdown procedure

You can shutdown Viso by signing out your account from web browser or closing the web browser.

---

## Decommissioning and Disposal

Please contact OMRON Customer Service to start the decommissioning and disposal process for Viso, and to ensure that any personal identifiable information you have entered to Viso is deleted.

## Important Safety Information

Read the Important Safety Information in this instruction manual before using this application.

Follow this instruction manual thoroughly for your safety.



### **WARNING**

Indicates a potentially hazardous situation which, if not avoided, could result in death or serious injury.

- Make sure the patient's information is correctly entered into Viso at all times (manually or by other means). If the information is not correct, this application cannot provide the correct response and/or recommendations.
- When using Viso during patient examination, make sure that the displayed information is the examined patient's information.
- When creating prescriptions in the EMR, make sure to prescribe exactly the same medications that are in the patient's current medications in Viso (down to the dosage and frequency). If you wish to change the medications, first update the patient's medications in Viso. If the prescription is different, patients may be confused and/or harmed, and the application cannot provide the correct recommendations in the future.
- The treatment recommendations in Viso are suggestions based on NICE guideline NG136, which is expected to take into consideration. You still have the responsibility to exercise your judgement and make final decisions appropriate for each individual patient.
- The doctor has the responsibility to decide on various tests associated with medication. Incorrect prescription will lead to worsening of the patient's condition.
- Please check your patients' action cards regularly. Inappropriate treatment or advice may lead to worsening of the patient's condition.
- Do not delete patient's information accidentally. This may lead to lack of improvement or worsening of the patient's condition.
- Set each dashboard user's authorization properly. Providing inappropriate authorization levels to a user may lead to incorrect decision authorization and/or worsening of the patient's condition.
- When receiving information from a patient (e.g. questionnaire responses from a patient, the information may be incomplete. Please contact the patient directly before making decisions for their treatment. Failure to understand the actual situation may lead to worsening of the patient's condition.

## RESPONSIBILITY OF RESPONSIBLE ORGANIZATION (GPs)

- Execution of the HEALTH SOFTWARE on an IT-NETWORK could result in previously unidentified RISKS to patients, USERS or third parties
- The RESPONSIBLE ORGANIZATION is advised to identify, analyze, evaluate and control these RISKS
- Subsequent changes to the IT-NETWORK could introduce new RISKS and require additional analysis  
Changes to the IT-NETWORK include:
  - Changes in IT-NETWORK configuration
  - Addition of items (hardware and/or software platforms or software applications) to the IT-NETWORK
  - Removal of items from the IT-NETWORK
  - Update of hardware and/or software platforms or software applications on the IT-NETWORK
  - Upgrade of hardware and/or software platforms or software applications on the IT-NETWORK

## IT-NETWORK Requirement

---

Your laptop is to be connected to internet to use this service.

## HAZARDOUS SITUATIONS resulting from a failure of the IT-NETWORK

---

No hazardous situations is identified due to failure of the IT-NETWORK.

# Initial Settings

## Registering Your Practice for Viso

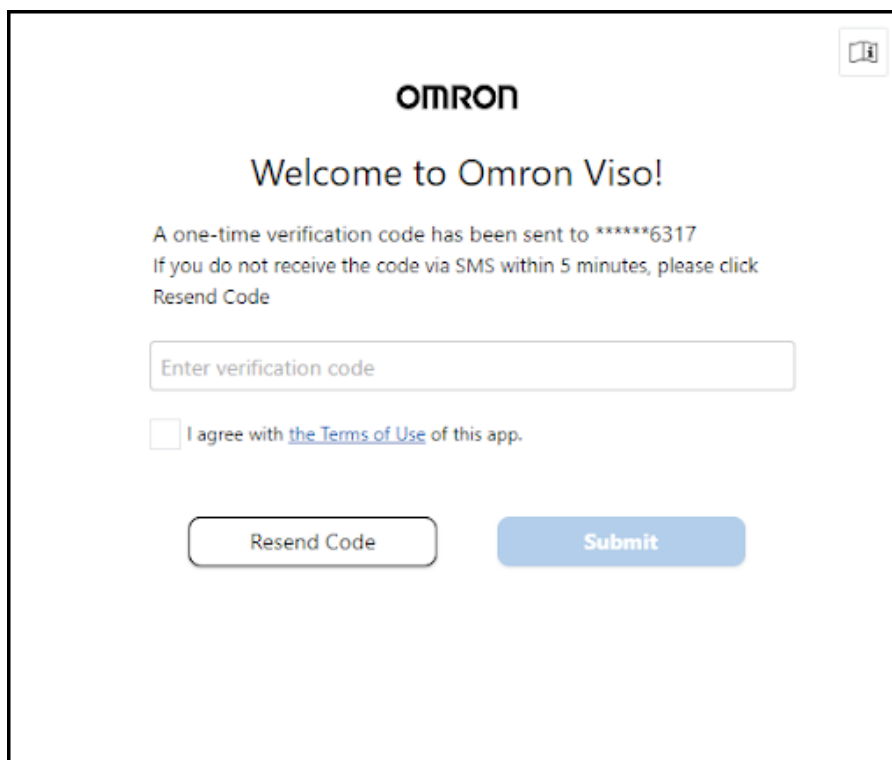
User registration to Viso requires 2-factor verification (email address and phone number).

### 1 Follow the link in the welcome email.

- During registration of a medical facility, OMRON will record the email address and mobile telephone number of an administrator (admin) user. Subsequent user accounts can be created by the admin user (see "Add Users [▶ 9]"). OMRON will send a welcome email, including a registration link, to newly registered users. To complete account verification follow the link in the welcome email.

### 2 Enter the verification code.

- Clicking the URL in the welcome email triggers a verification code to be sent by SMS to the mobile phone number recorded during initial registration. When prompted, enter the verification code into the box on the welcome screen.

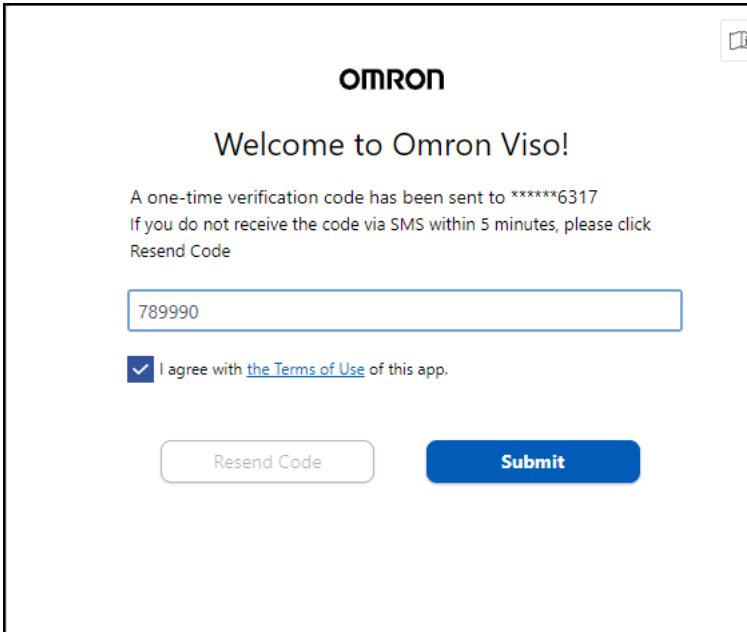
A screenshot of the Omron Viso mobile application's verification screen. At the top, the 'OMRON' logo is centered. Below it, the text 'Welcome to Omron Viso!' is displayed. A message states: 'A one-time verification code has been sent to \*\*\*\*\*6317. If you do not receive the code via SMS within 5 minutes, please click Resend Code'. There is a text input field labeled 'Enter verification code'. Below the input field is a checkbox with the text 'I agree with the Terms of Use of this app.'. At the bottom, there are two buttons: 'Resend Code' and 'Submit'.

#### Note

- If you did not receive a verification code by SMS, click [Resend Code]. If, after 5 minutes, you still have not received a verification code please contact OMRON Customer Service.

### 3 Review OMRON's terms of service.

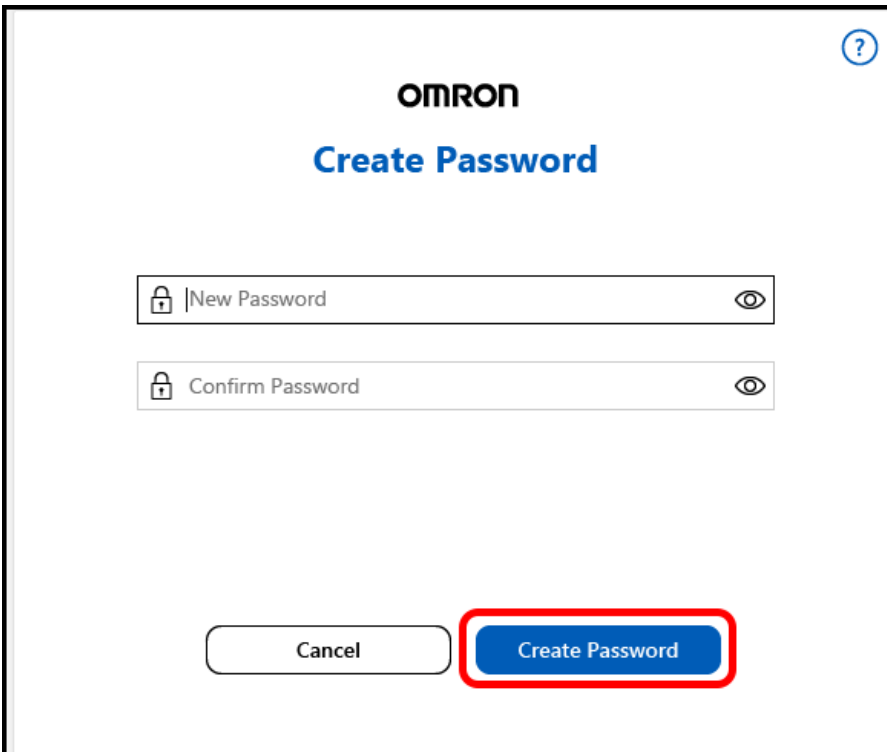
- In order for OMRON to be able to provide the best user experience, use of Viso is subject to OMRON's terms of service. To use Viso you must sign your agreement to the terms of service. When you have signed, click [Submit] to continue.



The image shows the Omron Viso welcome screen. At the top is the Omron logo. Below it, the text "Welcome to Omron Viso!" is displayed. A message states: "A one-time verification code has been sent to \*\*\*\*\*6317. If you do not receive the code via SMS within 5 minutes, please click Resend Code". Below this message is a text input field containing the code "789990". Under the input field is a checkbox that is checked, with the text "I agree with [the Terms of Use](#) of this app." To the right of the input field is a small icon of a document with a checkmark. At the bottom are two buttons: "Resend Code" and "Submit".

#### 4 Create your password.

- Once you have entered your password, enter it again to confirm and click [Create Password] to continue.



The image shows the Omron Viso "Create Password" screen. At the top is the Omron logo. Below it, the text "Create Password" is displayed in blue. There are two password input fields. The first field is labeled "New Password" and has a lock icon on the left and an eye icon on the right. The second field is labeled "Confirm Password" and also has a lock icon on the left and an eye icon on the right. At the bottom are two buttons: "Cancel" and "Create Password". The "Create Password" button is highlighted with a red rectangular border.

#### Note

- You must create a strong password with a mixture of letters, numbers and characters. The minimum password length is 8 characters.

#### 5 Sign in to Viso.



- Congratulations, you have now verified your Viso account.  
To log in to the Viso platform, enter your email address and password, and click [Sign in].

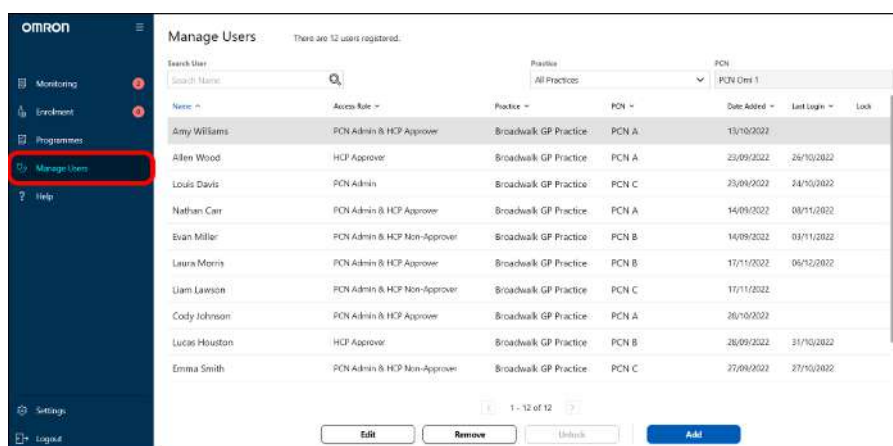
## Add Users

1 <Admin> Log in to Viso as an administrator.

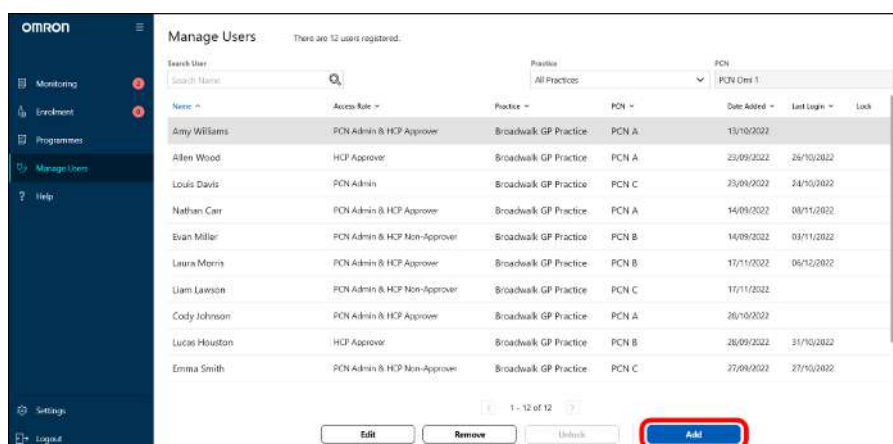
### Note

- Only administrators can register additional users.

2 <Admin> Click [Manage Users].



3 <Admin> Click [Add].



4 <Admin> Fill in the required information in all tabs and click [Save].

The image displays two screenshots of the Omron Viso user management interface. The top screenshot shows the 'Details' tab for user 'Amy Williams'. The interface includes a sidebar with navigation options: Monitoring, Enrollment, Programmes, Manage Users (selected), Help, Settings, and Logout. The main content area has tabs for 'Details' and 'Access Role'. The 'Details' tab contains the following fields: First Name (Amy), Practice (Broadwalk GP Practice), Other Name(s) (Enter Middle Name), PCN (PCN A), Family Name (Williams), Country Code (44 United Kingdom), Mobile Phone Number (07985332410), and Email (amywilliams@example.com). At the bottom are 'Cancel' and 'Save' buttons. The bottom screenshot shows the 'Access Role' tab for user 'Quyen Pham'. It includes an 'Access Role' section with a note: 'Users with an access role with multiple roles will grant a user access to the features that are associated with both those roles.' Below this are two sections: 'Select if this user has an HCP role (if applicable):' with a checked 'HCP Approver' checkbox, and 'Select if this user has an admin role (if applicable):' with a checked 'PCN Admin' checkbox. At the bottom are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red rectangle.

## Note

- User permissions are defined by access role. Therefore it's important to set the appropriate access role when registering new users. Access roles can be modified after initial registration in the "Manage Users" page.

### Access Roles:

- HCP Approver: Can execute all activities in Viso, including registration of patients and approval of patient treatment plans, medication changes, etc.
- HCP Non-Approver: Can register patients, review and submit treatment plans and medication changes for approval. Changes that impact patient care will be routed to an HCP Approver for approval before being sent to the patient.
- PCN Admin: Can add/edit/delete HCP dashboard users at a PCN level. Cannot view or edit patient data\*.
- ICS Admin: Can add/edit/delete HCP dashboard users at an ICS level. Cannot view or edit patient data\*.

\*A user who has both an HCP role and Admin role will be able to view and edit patient data.

- For more information about this screen, refer to "Edit Users [▶ 38]".

## 5 <New user> Verify new user's account.

- Refer to "Registering Your Practice for Viso [▶ 7]" for detailed steps.

# Patient Enrolment

## Enrol a Patient

Patient enrolment involves entering patient demographics and assigning the appropriate programmes to a patient.

Depending on the programme(s) selected, entering medical information and/or personalising the monitoring or treatment plans may be required.

When patient enrolment is completed, an invitation email will be sent to the patient to download and log in to their Viso app.

There are 2 ways to enrol a patient on Viso.

1. Send a sign-up link to your patient
2. Enrol the patient using the Viso Dashboard

### Note

- Independent of the registration method used, to access Viso, patients must use NHS login. NHS login is a single secure login that enables your patient to swiftly access multiple health and social care apps and websites wherever there is the NHS login button.
- The NHS requires patients to have a high level of identity verification associated to their NHS login account to use services like Viso.

## Send the sign-up link to your patient

When your Viso account was created, you would have received a welcome email containing your “Personal Unique Patient Registration Link” (valid for HCP Approvers only). Send this link to the patient(s) you want to enrol. Once they complete the sign-up form, if all of the patient information can be verified, they will be added into the Hypertension Plus Monitoring-Only Programme. If the patient information cannot be verified, you will be asked to complete the enrolment. See Complete Enrolment [▶ 14] for more information on the next registration steps. Once you have completed the enrolment, patients will receive a confirmation email and will be able to use the Viso app.

### Note

- Please use your link only if you are an HCP Approver.
- For HCP Non-approvers, you may send the link of the HCP Approver in your practice to the patient to be enrolled.
- If a patient signs up using a link of an HCP Non-approver, they can complete the process, but their registration will fail.
- Lead HCP-Approvers can be reassigned during the completion of registration process.

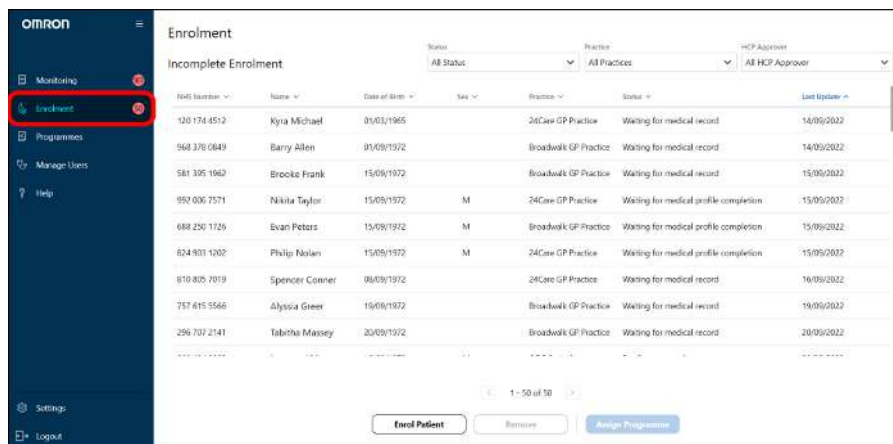
## Enrol the patient using the Viso Dashboard

You can enrol one patient at a time following the steps below.

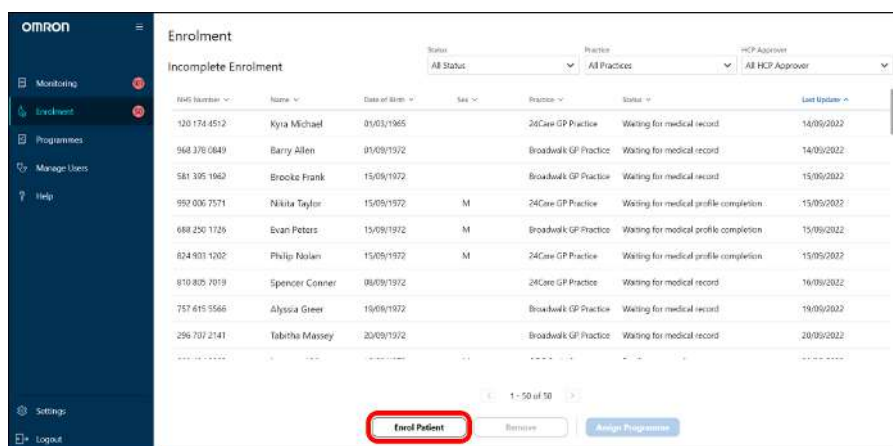
### Note

- Please obtain patient approval before adding their information into Viso.

- 1 Log in to Viso as an HCP Approver or HCP Non-Approver.
- 2 Click [Enrolment].



- 3 Click [Enrol Patient].



- 4 Fill in the form and click [Assign Programme].

## New Enrolment

Fill in the details below and click on "Add" to fetch the patient's information from the medical record. The patient will be added to the incomplete registrations list, and you will be able to continue their registration once the medical record information has been retrieved.

**Patient NHS number \***

148 623 8955

**Patient's First Name \***

Henry

For reference, this will be updated to match the medical record if patient is found.

**Date of Birth \***

21/11/1972

**Assigned HCP Approver \***

PCN HCP Approver

Close

Assign Programme

### Note

- The Patient Name entered in this dialogue is for reference the during registration process only and will be replaced with the patient's full name as registered in the medical record, after information retrieval from the medical record is complete.

## 5 Select one or more programmes and click [Add].

**Programmes**

Please select the treatment programmes which you would like to register for this patient.

**Validated Treatment Programmes**  
These programmes use automated decision support recommendations based on validated clinical studies and national guidelines.

☒ Hypertension Plus Programme ☐ Monitoring Only (No medication plan included) ☐ Monitoring & Medication Titration

Cancel Add

- Depending on your selections on this page, you may be prompted to enter further information or personalize the monitoring/treatment plans. For more information on available programmes and options on this page, see Managing Programmes [▶ 36].

- Once you have completed the enrolment, patients will receive a confirmation email and will be able to use the Viso app.



## WARNING

- Check the warnings for each programme in the information button ⓘ next to the programme name.

### Note

- After adding the patient, the patient will be added to the "Incomplete Enrolment" list with the status "Waiting for medical record".
- After your patient's confirmation, the programme will have safe access to the information in the Medical Record.
- Programmes can still be added, edited, or removed at the next step when completing enrolment, or even after the patient is enrolled.
- Certain programmes might be incompatible with each other due to medical complexity. You will be informed by Viso of this, and you will need to remove one of the incompatible programmes to proceed.
- Patients may be deemed ineligible for specific programmes after verification of the patient's information. In this case, you will be asked to reselect a patient's programme(s) when completing enrolment.

## Complete Enrolment

After a patient has been added to the incomplete enrolment list, complete their enrolment following the steps below.

- 1 Select a patient from the list and click [Assign Programme].

ENR Number	Name	Date of Birth	Sex	Practice	Status	Last Update
145 623 8955	Henry Taylor	21/11/1972		24Care GP Practice	Broadwalk GP Practice	14/09/2022
968 378 0649	Barry Allen	01/09/1972		Broadwalk GP Practice	Waiting for medical record	14/09/2022
581 395 1962	Brooke Frank	15/09/1972		Broadwalk GP Practice	Waiting for medical record	15/09/2022
992 006 7571	Nikita Taylor	15/09/1972	F	24Care GP Practice	Waiting for medical profile completion	15/09/2022
888 250 1726	Evan Peters	15/09/1972	F	Broadwalk GP Practice	Waiting for medical profile completion	15/09/2022
824 903 1202	Philip Nolan	15/09/1972	F	24Care GP Practice	Waiting for medical profile completion	15/09/2022
816 805 7019	Spencer Conner	08/09/1972		24Care GP Practice	Waiting for medical record	16/09/2022
757 615 5566	Alyssia Green	15/09/1972		Broadwalk GP Practice	Waiting for medical record	19/09/2022
296 707 2141	Isabtha Massey	20/09/1972		Broadwalk GP Practice	Waiting for medical record	20/09/2022

1 - 50 of 50

Enrol Patient Remove **Assign Programme**

The button is only enabled for patients with the following statuses:

Status	Description
Basic information review required	Rectify or complete the patient's information to complete their enrolment.
Waiting for programme assignment	Assign programme(s) to the patient to complete their enrolment.
Waiting for medical profile completion	Enter the required medical information for the patient to complete their enrolment.

Waiting for programme customisation/treatment plan	Fill in the customisations and/or titration plan for the programme(s) selected for the patient to complete their enrolment.
Pending approval	The enrolment has been completed by a HCP Non-approver and needs to be approved by a HCP Approver.

- If the patient's information is complete and they do not require a medication plan, their enrolment will be automatically completed after the medical record synchronisation. The patient will move from the "Incomplete Enrolment" list to the "Monitoring" list automatically.

## Note

- It may take some time for medical record synchronisation and for patients to be updated from "Waiting for medical record".
- Refresh the page to update the incomplete enrolments to the latest statuses.
- The following are error statuses:
  - "NHS number not found in medical record" or "Error in retrieving medical record": the NHS number was entered incorrectly during registration, or a system error has occurred. Please remove the patient from the list and start a new enrolment for the patient.
  - "NHS No. and DoB entered did not match": NHS No. and DoB entered when enrolling the patient directly on Viso did not match. Please remove the patient from the list and start a new enrolment for the patient.
  - "NHS login DoB does not match with medical record": The DoB registered in a patient's NHS account and the DoB registered in the medical record does not match. Contact the patient to correct their DoB in their NHS account or correct the DoB on the medical record, remove the patient, then start a new enrolment for the patient. If this error persists there might be a connection issue between Viso and the electronic patient record system. Contact OMRON Customer Service for assistance.
- This list is sorted by the "last update" date by default. Click on a column header to sort the list by that column instead.
- The list can be filtered using the drop-down menus on the page.

## 2 Complete the required fields and click [Next].

**Henry Taylor**  
145 623 8955 | 50 yo | Male

**Patient Profile**  
Basic Information  
Programmes

**Basic Information**  
Please make sure the information is correct and complete (a verified mobile phone number and email address are mandatory). Mandatory fields are marked with \*.

First Name: Henry Taylor  
Date of Birth: 21/11/1972  
Sex: ☒ Male ☐ Female  
Other Names:   
Family Name: 1  
Ethnicity: Black African  
Country Code: +44 United Kingdom  
Mobile Phone Number: 282550756  
Assigned to HCP Approver: FON HCP Approver  
Email: htmattaloo@gmail.com

Buttons: Quit, Save Draft, Back, Next (highlighted)

- **CONFIRM** the information is inputted correctly. Incorrect input may lead to inappropriate treatment.

**Note**

- Only information required to create personalized treatment plan recommendations is requested by Viso.
- Mandatory fields are marked with a red asterisk (\*). It is not possible to proceed with registration if these fields are left blank.

### 3 Confirm the programme is selected correctly and click [Next].

The screenshot shows a web interface for patient enrolment. On the left, a sidebar displays the patient's name 'Henry Taylor' and a 'Patient Profile' section. The main content area is titled 'Programmes' and includes a sub-header 'Validated Treatment Programmes'. Below this, three radio button options are listed: 'Hypertension Plus Programme' (which is selected and has a blue checkmark), 'Monitoring Only (No medication plan included)', and 'Monitoring & Medication Titration'. At the bottom of the form, there are 'Back' and 'Next' buttons. The 'Next' button is highlighted with a red rectangular box.

- Enrolment is complete after this step if the patient is only enrolled for Hypertension Plus Monitoring-Only Programme. Otherwise, proceed to the possible next steps listed below.

Steps for Creating a Titration Programme [► 16]

## Steps for Creating a Titration Programme

The steps below is applicable only when "Monitoring+Titration" is selected for "Validated Treatment Programmes".

### 1 Enter the medical history.

- Viso uses the medical history information of a patient to recommend the medication titration plan, if it can be recommended, based on validated national patient management protocols. The recommended plan varies depending on the medical history and current co-morbidities of the patient.
- In certain cases, Viso cannot automatically recommend a treatment plan due to the complex management pathways for the patient. Viso can still be used to manage these patients remotely, however treatment plans must be inputted manually by the clinician (see "More About Creating Titration Plan [► 21]").
- Mark any applicable conditions by selecting "Yes" in the radio button next to that condition. When completed, click [Next].



**Henry Taylor**  
148 623 8955 | 50 yo | Male

**Medical History**  
Mark any of the conditions that apply:

Condition	Yes	No
1 Target Organ Damage ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
2 Established Cardiovascular Disease ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
3 Renal Disease (Advised to read note if marked) ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
4 Type 2 Diabetes ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
5 Estimated 10-year risk of cardiovascular disease more than 10% ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
6 Chronic Kidney Disease or Type 1 Diabetes ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
7 Evidence of Heart Failure ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
8 Multimorbidity ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
9 Frailty (including severity) ⓘ	<input type="radio"/>	<input checked="" type="radio"/>
10 Postural Drop / Postural Hypotension (Advised to read note if marked) ⓘ	<input type="radio"/>	<input checked="" type="radio"/>

Buttons: Quit, Save Draft, Back, **Next**

- **CONFIRM** the information is inputted correctly. Incorrect input may lead to inappropriate treatment.

### Note

- Click ⓘ next to the condition to view a more specific definition of the condition.

## 2 Enter the basic health information.

- In certain cases, Viso may require additional health information to generate a recommendation plan. For example, Viso uses the NICE recommendations for treatment of hypertension which varies depending on the blood pressure level. If a patient is not currently under hypertensive treatment, their latest blood pressure will be used to in determining the recommendation.
- Enter the information into the designated fields and click [Next].

**Henry Taylor**  
148 623 8955 | 50 yo | Male

**Basic Health Information**  
Mandatory fields are marked with \*.

**Latest Blood Pressure Results**

Systolic \*  mmHg Diastolic \*  mmHg Date of Measurement \*

Blood pressure measurements from ABPM, home or clinic? \*

☐ Home/ABPM ☒ Clinic

**Pregnancy**  
Mark the ones that apply to the patient's pregnancy status.

☐ Pregnant ☐ Considering pregnancy ☐ Breastfeeding

Buttons: Quit, Save Draft, Back, **Next**

- **CONFIRM** the information is inputted correctly. Incorrect input may lead to inappropriate treatment.

## 3 Enter the current medications (if applicable).

- When enrolling patients that are already under treatment, Viso takes into account their current medication in order to generate a treatment plan recommendation. The new treatment plan will automatically start from the next titration step.
- During the enrolment period, only hypertensive medication should be added. Non-hypertensive medications may also be added after enrolment; however, these will not be applicable to the Validated Treatment Plan. These medications will be visible to the patient in the Viso app where they can set medication reminders and on the clinician dashboard.

- Leave this section blank if a patient is not currently on any medication. To add more medications simply click [Add Additional Medication]. Confirmation screen will displayed when clicking [Next]. Click [Next] again to continue.

**Henry Taylor**  
148 623 8055 | 50 yo | Male

**Current Medication**  
Fill in the medication that the patient is already taking prior to enrolment.  
You can add up to 20 medications and change the category of each medication.  
Make sure to select "Hypertension" for hypertensive medication as they will affect the titration recommendation provided by Viso. You can add up to 10 medications under the "Hypertension" category.

Hypertension  
ACE inhibitor Captopril Carvedilol Tablet 12.5 mg 2 times per day

+ Add Medication

☒ I confirm that I have assigned the patient's current medications to their appropriate categories and am aware that this affects the recommendations provided by Viso's Validated Treatment Programmes.

Quit Save Draft Back **Next**

- **CONFIRM** the information is inputted correctly. Incorrect input may lead to inappropriate treatment.

## 4 Enter the drug intolerance.

- Viso takes into account any known medication intolerances when creating treatment plan recommendations. Intolerances can be identified at 'class' level (for example ACE inhibitor or CCB) or at drug active level (e.g. captopril, ramipril). When the checkbox is marked and moved to "Patient's Drug Intolerances", Viso will exclude the class or active from the medication plan recommendation.

**Henry Taylor**  
148 623 8055 | 50 yo | Male

**Drug Intolerance**  
Mark any of the below medication classes if the patient has indicated intolerance to:

Patient's Drug Intolerances

+ Add Delete

All Drugs  
Trazodone  
Thymoxamine  
Telmisartan  
Zidovudine  
ARB  
Amlodipine  
Candesartan  
Eprosartan  
Irbesartan  
Losartan  
Olmesartan  
Telmisartan  
Valsartan  
Cardioselective Beta Blocker  
Acetaminophen

Quit Save Draft Back **Next**

- **CONFIRM** the information is inputted correctly. Incorrect input may lead to inappropriate treatment.

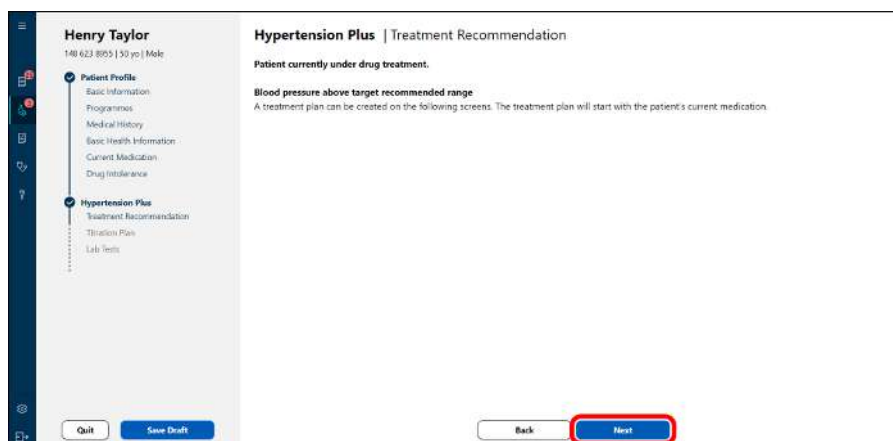
### Note

- When reviewing a medication plan, always confirm that the plan is suitable for patients based on their known medication intolerances.
- The medication intolerance list for registered patients can always be accessed and edited from the patient settings screen in the dashboard (see "Edit Patient Information [▶ 29]" page).

## 5 Review the treatment recommendation.

- Viso will display a treatment recommendation based on validated national patient management protocols using the patient data added during registration.

- The recommendation will also indicate whether Viso can automatically generate a treatment plan based on the patient profile. Treatment plans can be created and edited in the following screens.
- Click [Next] to create, edit and review the plan.



### Note

- There are some cases that the Viso cannot generate treatment recommendation. Read the explanation on the screen for details. If such a case occurs, you need to create a custom treatment plan.
- For the hypertension programme, the recommendation displayed in Viso exactly reflects the wording used by NICE. For explanation on the meaning of the recommendation please refer to the NICE Guideline Hypertension in Adults: Diagnosis and Management (NG136).
- Click ⓘ to see the rationale for the treatment recommendation.

## 6 Setting targets and treatment plans.

- Target values for the indices monitored with the Validated Treatment Programme may be recommended by Viso. For example, Viso generates a target blood pressure recommendation based on NICE guidelines for Hypertension Plus programme patients. The target can be edited.
- You can also set the Alert Threshold for the indices monitored for the programme on this page. Different Alert Thresholds can be set for each patient.
- The Hypertension Plus Programme generates recommended treatment plans for the majority of patients based on their profile and medical history. When Viso cannot generate a recommended plan, a custom medication plan can be created.
- Hypertension Plus uses a 3-step medication plan as the basis for remote management and titration of patients.
- Click [Next] to go to confirmation screen. After confirmation, click [Next] again.

**Henry Taylor**  
140 423 4955 (50 yo) Male

**Hypertension Plus | Titration Plan**

Target Home Blood Pressure ⓘ

Systolic: 135 mmHg Diastolic: 85 mmHg [Reset to Default](#)

Alert Threshold

Diastolic: Upper limit: 115 mmHg [Reset to Default](#)

Threshold for red/high priority alert:

Systolic: Upper limit: 210 mmHg Lower limit: 110 mmHg [Reset to Default](#)

Threshold for amber/med priority alert:

Systolic: Upper limit: 175 mmHg Lower limit: 100 mmHg [Reset to Default](#)

Treatment Plan (Recommended) [Link to medication on the medical record](#)

☐ Use medication recommendation for **Elderly** ⓘ

**STEP 1** [Recommend](#)

ACE Inhibitor High Level

Captopril Carvedilol Tablet 12.5 mg 2 Times per day ⓘ

[Add Additional Medication](#)

**STEP 2** [Recommend](#) [Copy Previous Step](#)

Tablet Low Level

Active Ingredient Form Dose Times per day

[Add Additional Medication](#)

**STEP 3** [Recommend](#) [Copy Previous Step](#)

Tablet Small Level

Active Ingredient Form Dose Times per day

[Add Additional Medication](#)

[Save Draft](#) [Back](#) [Save](#)

A medication plan step consists of the following elements:

Class	The type of medication that will be prescribed, for example Calcium Channel Blocker, ACE Inhibitor, ARB, Beta-Blocker etc.
Medication Level	Titration plans are created based on incremental increases in medication within each NICE treatment guidelines step. For the majority of medications there are 4 steps within a medication class: Low, Medium, High and Maximum, defined based on the British National Formulary dosage guidance. Certain medications (For example Amlodipine) have a lower number of standard steps.
Active	The active ingredient of the medication.
Brand	Either branded or generic medication can be selected.
Form	Tablet, Capsule etc.
Dose	Dose per sitting of that active (for example if a patient is taking 5 mg Amlodipine 2 times per day, the dose would be 5mg).  Note: "Medication Level" is linked to an active's total daily dosage which is the Dose multiplied by Times per day. Selecting the level of medication will automatically return the corresponding Dose per sitting and Times per day. Other available doses can be selected via the drop-down list.
Times per day	The number of times per day that patient should take the medication. In the example of Amlodipine above, this would be "2".

### Note

- The Hypertension Plus treatment plan recommendations are based on the NICE Guideline, Hypertension in Adults: Diagnosis and Management (NG136), dosage levels and frequency are derived from guidance in the British National Formulary.
- If Viso has been linked to the EMR, the medication information configured in this section will be recorded in the EMR.
- You can always select a dosage of an adult or an elderly from the drop down list. By checking "Use dosage recommendation for Elderly", the recommended dosage will be decreased (the flag will be displayed when you select the recommended dosage for elderly).
- You can add up to 10 medications within a single step.
- For more information on the treatment plan interface, see "More About Creating Titration Plan [▶ 21]".

## 7 Set the frequency of the lab tests.

- For certain programmes, Viso shows the recommended period for the patient to undergo their bloods and/or urine review on this page. You can edit the frequency of receiving a reminder for the routine review of the bloods and/or urine of the patient.
- Click [Approve] to finish the enrolment.

### Note

- If the patient is to be enrolled to another programme, Viso will move to the enrolment screens of the next programmes. If not, the enrolment is complete.

## More About Creating Titration Plan

### Completing a recommended titration plan

When a medication step has been recommended by Viso, a "flag" symbol will be displayed next to the first step in the plan and the Class and Level of medication fields will be completed.

If a local ICS formulary has been provided to OMRON, the Active, Brand, Form and Dosage fields will be completed based on the ICS preferred medication for the recommended Class. If no formulary has been provided, the user can complete the field by selecting values from the drop-down lists.

Use the following procedure to complete a medication plan with automatic recommendation:

- 1 After reviewing the first step of the plan, click the [Recommend] button next to Step 2 in the plan. This will generate the next-step recommendation. A "flag" symbol will be displayed next to Step 2 and the fields completed as described in Step 1.

The screenshot shows the 'Treatment Plan (Recommended)' interface for a patient named Henry Taylor. The interface includes a sidebar with patient information and a main area with three steps. Step 2 is highlighted with a red box, indicating it is the current step. The steps are as follows:

- STEP 1:** CC3, Low, 1mg, 1 tablet, 5, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.
- STEP 2:** CC3, Maximum, 1mg, 1 tablet, 10, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.
- STEP 3:** CC3, Low, 1mg, 1 tablet, 5, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.

At the bottom, there are buttons for 'Quit', 'Save Draft', 'Back', and 'Next'.

- 2 After reviewing the second step of the plan, click the [Recommend] button next to Step 3 in the plan. This will generate the next-step recommendation. A "flag" symbol will be displayed next to Step 3 and the fields completed as described in Step 1.

The screenshot shows the 'Treatment Plan (Recommended)' interface for a patient named Henry Taylor. The interface includes a sidebar with patient information and a main area with three steps. Step 3 is highlighted with a red box, indicating it is the current step. The steps are as follows:

- STEP 1:** CC3, Low, 1mg, 1 tablet, 5, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.
- STEP 2:** CC3, Maximum, 1mg, 1 tablet, 10, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.
- STEP 3:** CC3, Low, 1mg, 1 tablet, 5, 1mg, 1 time(s) per day. Includes an 'Add Medication' button.

At the bottom, there are buttons for 'Quit', 'Save Draft', 'Back', and 'Next'.

- 3 After completing the plan, click [Next] to go to the confirmation screen. After confirmation, click [Next] again.

**Henry Taylor**  
140 527 8950 | 50 yo | Male

**Patient Profile**  
Basic Information  
Programmes  
Medical History  
Basic Health Information  
Current Medication  
Drug Interference

**Hypertension Plus**  
Secondary Recommendation  
Therapy Plan  
Lab Tests

**Treatment Plan (Recommended)**  
☐ Use medication recommendation for Henry

**STEP 1** Recommended  
CCB: Amlodipine Low 5mg 1 times per day  
Add Medication

**STEP 2** Recommended Copy Previous Step  
CCB: Amlodipine High 10mg 1 times per day  
Add Medication

**STEP 3** Recommended Copy Previous Step  
CCB: Amlodipine High 10mg 1 times per day  
ACEI: Lisinopril Low 5mg 1 times per day  
Add Medication

Quit Save Draft Back **Next**

## Editing a recommended plan

All fields in a recommended plan can be edited. Changes can be made directly in the target field. When a field is edited the "flag" symbol next to the step will disappear.

To add an additional medication to a planned step, click [Add Medication]. A new line is added to the plan and the fields can be completed with the medication information.

To copy the medications from a previous step into the current step you are editing, click [Copy previous step] beside the current step number. This will overwrite all existing input in the current step. The current step will no longer be a recommended step.

Once a step has been edited, the user can either continue to edit the next step manually, or click [Recommend]. Viso will use the manually edited step as the starting point to make the next step recommendation.

After completing the plan, click [Next]. When [Approve] is clicked in the next screen, a comment box will appear to record the reason for deviation vs recommendation.

### Note

- To remove a medication click the "trash can" symbol on the medication line. If there is only 1 medication in a step this cannot be removed.
- The "flag" (recommended plan) is for support planning the medication plan based on NICE guideline. The final decision of medication must be done by a healthcare professional.

### Example:

Dr. Smith is creating a medication plan for Mrs. Brown. Viso has automatically recommended a 3-step plan:

Step 1: Amlodipine Low

Step 2: Amlodipine High

Step 3: Amlodipine Plus Lisinopril

**Henry Taylor**  
145 527 8955 | 50 yo | Male

**Patient Profile**  
Basic Information  
Programmes  
Medical History  
Basic Health Information  
Current Medication  
Drug Interference

**Hypertension Plus**  
Secondary Recommendation  
Therapy Plan  
Lab Tests

**Treatment Plan (Recommended)**  
[List of medications per this medical record](#)

☐ Use medication recommendation for **Biliary** ⓘ

**STEP 1** ⓘ **Recommended**

CCB **Low** **low**  
Aspirin **Aspirin** **Tablet** **10** **mg** **1** **time(s) per day** ⓘ  
[Add Medication](#)

**STEP 2** ⓘ **Recommended** **Copy Previous Step**

CCB **Maximum** **low**  
Aspirin **Aspirin** **Tablet** **10** **mg** **1** **time(s) per day** ⓘ  
[Add Medication](#)

**STEP 3** ⓘ **Recommended** **Copy Previous Step**

CCB **Maximum** **low**  
Aspirin **Aspirin** **Tablet** **10** **mg** **1** **time(s) per day** ⓘ  
ARB **Low** **low**  
Candesartan cilexetil **Candesartan cilexetil** **Tablet** **8** **mg** **1** **time(s) per day** ⓘ  
[Add Medication](#)

[Quit](#) [Save Draft](#) [Back](#) [Next](#)

## Creating a Custom Plan

When Viso cannot generate a recommended plan a custom medication plan can be created. To create a custom plan, complete the class, active, brand, form and dosage fields by selecting from the drop-down lists.

To add a medication within an existing step, click [Add Medication] and complete the required fields.

To copy the medications from a previous step into the current step you are editing, click [Copy previous step] beside the current step number. This will overwrite all existing input in the current step.

When the 3-step plan is completed, click [Next] to continue to the confirmation screen.

### Note

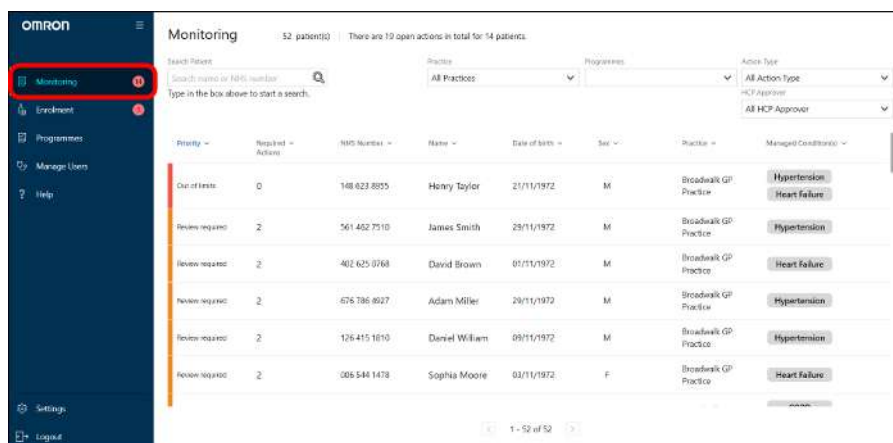
- Click ⓘ next to a medication line to view medication indications from the British National Formulary.



# Daily Use

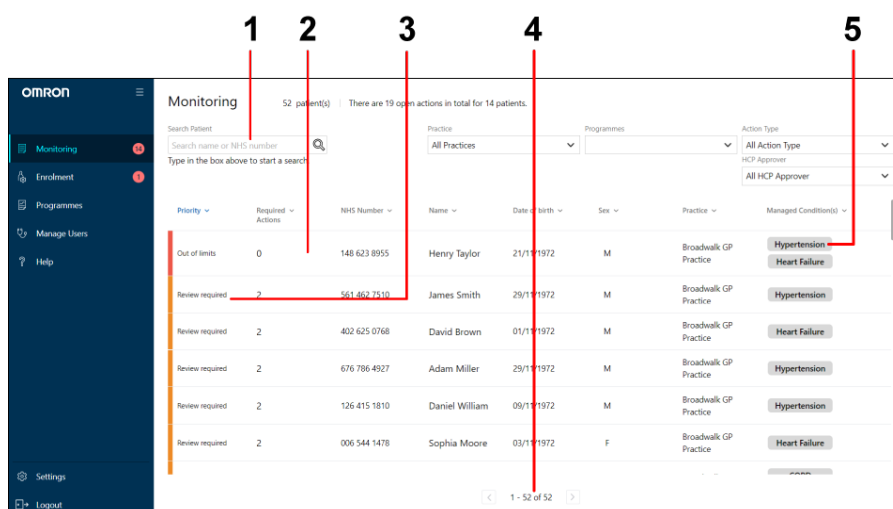
## Monitoring the Viso Dashboard

Click [Monitoring] to view the Viso Dashboard.



## Key components of the Viso Dashboard

The Viso dashboard displays an overview of the patient population under management by the user.



### 1. Search Box

The search box can be used to search for patients by name or NHS number.

### 2. Patient List

Users can view all patients assigned to them and patients that they have right to view.

### 3. Priority

On entering the dashboard display, patients are automatically ranked in priority order depending on actions to be taken. There are 3 priority levels in Viso.

High: Patients with actions that require immediate attention

Medium: Patients with actions that require attention

Low: Patients that have no pending actions in Viso. Routine review is recommended.

## 4. Page Navigation

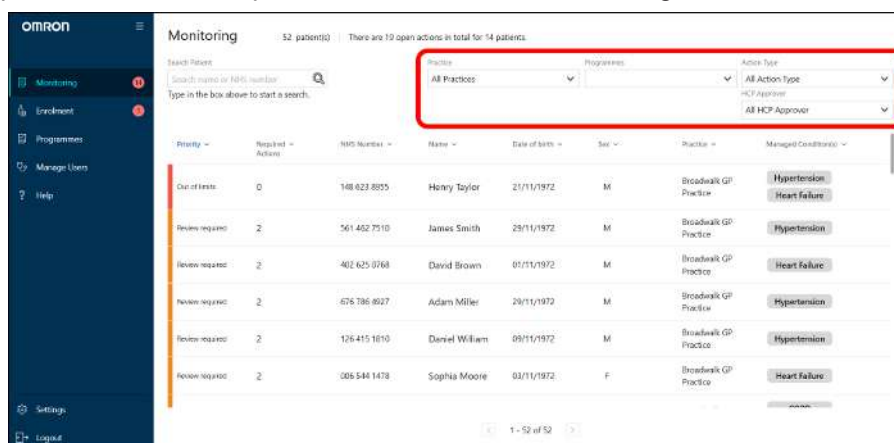
If you have many patients, your patient list will span multiple pages. Use the page navigator at the bottom of the screen to move to the next page in the list.

## 5. Managed Conditions

Displays the conditions the patient is being monitored for.

## Filter Patients

You can filter the patients in the list by practice, programmes, action type or the assigned HCP approver. For each filter option, click on the drop-down menu and select the settings for that filter.



- All filters have (Select All) option.
- By default, all options are selected.
- After changing the filter settings, click outside the drop-down menu to reload the patient list.
- When no filters are selected, there may be an error since there will be no patients to display.

### Note

- Action type refers to the type of actions that are pending for the patient. The action types are:
  - Urgent clinical attention required
  - Approval & Prescription
  - Review
  - Action & Test Requests
  - Engagement
- For example, for an HCP approver to quickly check on patients who have pending medication and programme update approvals, select only the "Approval & Prescription" option.

## Open Patient's Dashboard

Click a patient name to open the patient's dashboard screen.

**Monitoring** 52 patient(s) | There are 19 open actions in total for 14 patients.

Search Patient:  Search by name or NHS ID number. Type in the box above to start a search.

Practice:  All Practices | Programmes:  | Action Type:  All Action Type | HCP Approver:  All HCP Approver

Priority	Required Actions	NHS Number	Name	Date of birth	Sex	Practice	Managed Condition(s)
Out of limits	0	140 623 8955	Henry Taylor	21/11/1972	M	Brookwalk GP Practice	Hypertension Heart Failure
Review required	2	561 462 7510	James Smith	29/11/1972	M	Brookwalk GP Practice	Hypertension
Review required	2	462 625 0768	David Brown	01/11/1972	M	Brookwalk GP Practice	Heart Failure
Review required	2	676 766 8927	Adam Miller	28/11/1972	M	Brookwalk GP Practice	Hypertension
Review required	2	126 415 1810	Daniel William	09/11/1972	M	Brookwalk GP Practice	Hypertension
Review required	2	006 544 1478	Sophia Moore	03/11/1972	F	Brookwalk GP Practice	Heart Failure

1 - 52 of 52

**Patient 32 Quyen** 419 084 8662 | 07 Oct 1972 / 50 yrs | +44 096 354 8484 | Patient Settings | Report

Actions to be taken:

- Signs of major depression detected 08/10/2022
- Signs of major depression detected 08/10/2022
- Signs of major depression detected 11/10/2022
- Significant change/deterioration detected 11/10/2022
- Significant change/deterioration detected 11/10/2022
- Signs of major depression detected 11/10/2022
- Pulse changed over time 10/10/2022
- Significant change/deterioration detected 14/10/2022

View History >

Other Actions

Patient is enrolled in 1 programmes for: **Heart Failure**

Programme name	Type	Medication
Heart Failure	Standard Monitoring Programmes	

Blood Pressure: Last 7-Day avg: **120/103** mmHg

Pulse: Last 7-Day avg: **129** bpm

Manage Programmes >

## Patient Dashboard Overview

The dashboard for Patient 32 Quyen is annotated with numbered callouts:

- 1**: Points to the 'Actions to be taken' list on the left sidebar.
- 2**: Points to the 'Patient Settings' button at the top right.
- 3**: Points to the 'Report' button at the top right.
- 4**: Points to the 'Manage Programmes' button below the 'Heart Failure' programme.
- 5**: Points to the 'Report' button at the top right.
- 6**: Points to the 'Blood Pressure' widget showing a reading of 120/103 mmHg.
- 7**: Points to the 'Other Actions' link at the bottom of the left sidebar.

Click to go back to monitoring patients list.

Click to view patients list quickly.

### 1. Actions to be taken

In Viso, patient management workflows are based on patient action cards. Action cards are ranked by priority and describe a specific task to be completed.

Refer to "Patient Action Cards [▶ 28]" for more detail.


## 2. Enrolled programmes

Indicates the patient's current programme status.

## 3. Patient Settings

Click to edit the patient information. Refer to "Edit Patient Information [▶ 29]" for more information.

## 4. Medical record synchronization status

Displays the latest synchronization time with the connected electronic medical record. Medical history and drug intolerances can also be synchronized manually by clicking . If the time has not been updated, it means it was not possible to sync the record at that time. If the error persists, there might be a connection issue between Viso and the electronic patient record system. Contact OMRON Customer Service for assistance.

## 5. Report

Click to view detailed monitoring overview. Refer to "View Detailed Monitoring Overview [▶ 30]" for more information.

## 6. Patient's data

Displays the latest value of which the patient took measurements.

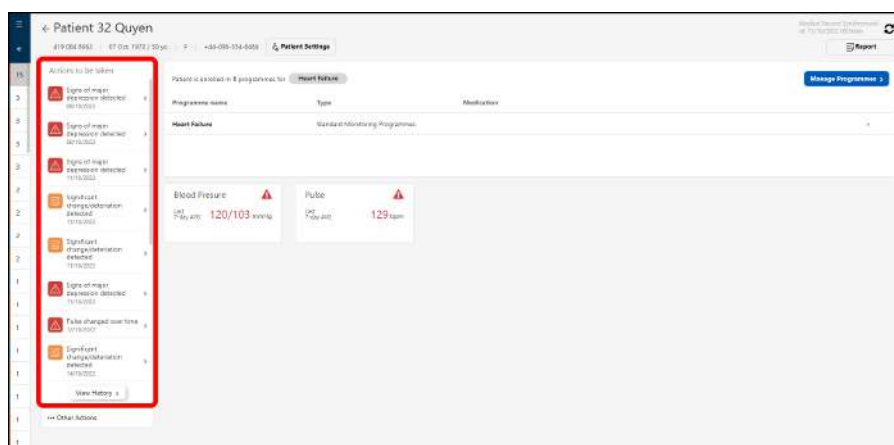
## 7. Other actions

Click to do some actions such as requesting contact, requesting blood/urine test, or specialist review.

# Patient Action Cards

In Viso, patient management workflows are based on patient action cards. Each action card refers to a specific task to be completed.

Click  to view details.

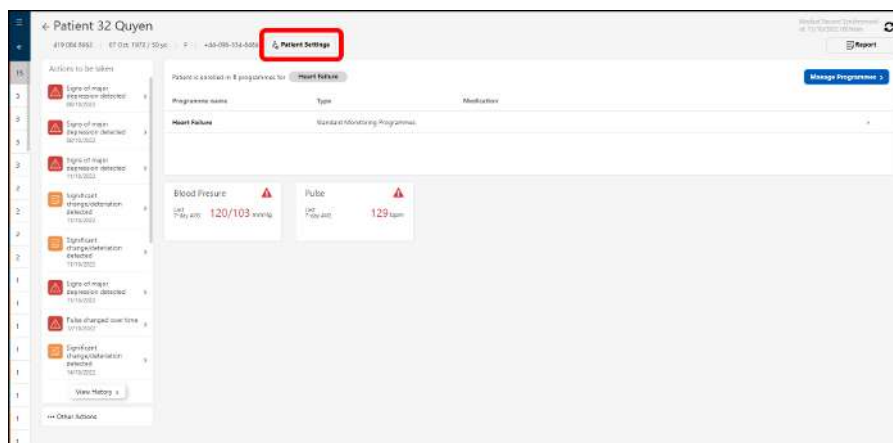


## Note

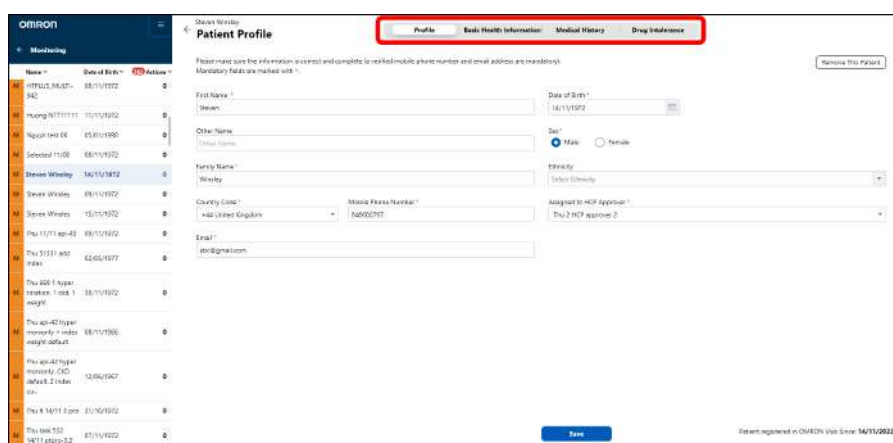
- Some actions can be taken only by the HCP approver.
- Only HCP approver can approve the treatment plan.
- If a new or edited treatment plan is rejected by the patient, they will continue to follow their current treatment step until a new plan is accepted. An Action Card is sent to the HCP informing of the rejection, and including any message / explanation added by the patient. From the Action Card the HCP can click [Edit Plan] to edit the patient's treatment plan and resubmit to the patient if desired.
- Action card alerts can be cleared by clicking [Clear Alert]. The alert will be triggered again if the same conditions are repeated.
- If Viso has been linked to the EMR, the results of an action card will be recorded in the EMR.

# Edit Patient Information

- 1 On the patient's dashboard screen, click [Patient Settings].



- 2 Select which section (Profile/Basic Health Info/Medical History or Drug Intolerance) should be modified, or select "Remove This Patient" if the patient information should be removed.



- 3 Modify the information and click [Save].

- On "Remove This Patient" section, confirm the message on the screen and click [Remove].

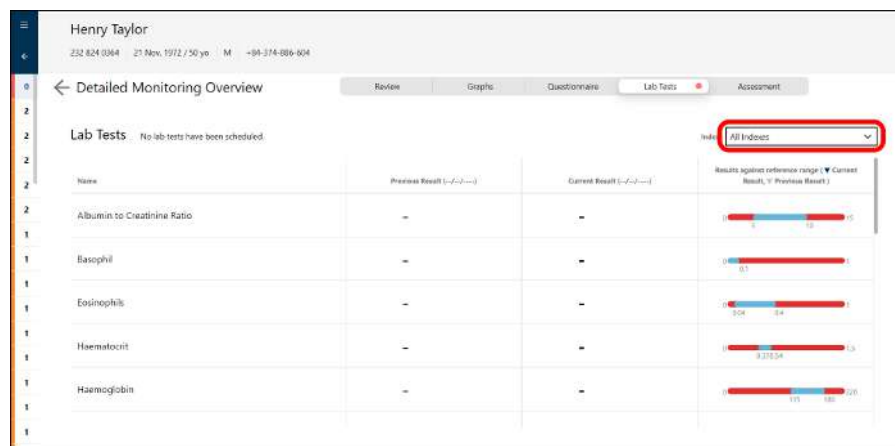
## Note

- [View Detailed Monitoring Overview](#)

---

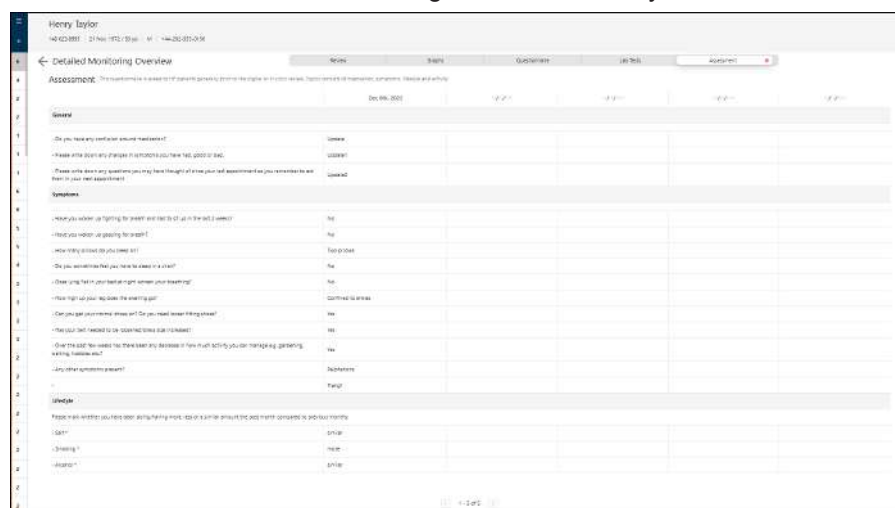
30





## Assessment section

Displays the last 2 assessment questionnaire results. This is the questionnaire sent just before a patient's review to prepare for their review. It is sent according to the "Review Cycle".



## Request Patient's Contact

From the Patient Dashboard screen, click [Other Actions] > [Request patient to contact GP surgery].

Select a request option and enter the reason to request contact into the message and click [Send Request].

The patient will receive a task in the Viso app to contact the clinic, along with the personalized message.

## Manage Blood and Urine Tests

From the Patient Dashboard screen, click [Other Actions] > [Blood and Urine Tests].

All scheduled of blood and urine tests appears.

To remove the schedule, select a schedule and click [Remove].

To add the schedule, click [Add] and fill the test information and the message for patient, then click [Send Request].

To confirm settings of each test, click [View].



Henry Taylor  
Blood and Urine tests

The list is for patient referral for this patient, you can set up the conversation with other external health care environments and can view the conversation history via this list.

Tests	Request date	Status	Scheduled Date	Confirmed Date	Test for
Blood Test	05/10/2022		05/10/2022	05/10/2022	Ferritin, Full Blood Count
Urine Test	05/11/2022		05/11/2022	04/11/2022	Urea/To, Renal Profile
Blood Test	15/11/2022	Cancelled			HbA1c
Blood Test	15/11/2022	Confirmed	20/11/2022	21/11/2022	HbA1c
Urine Test	05/12/2022	Request Cancelled	12/12/2022		Urea Function Tests, Thyroid Function Tests
Blood Test	05/12/2022	Request Send	09/12/2022		Ferritin, Full Blood Count

View Remove Add

## Manage Specialist Review Request

The Request Specialist Review process gives HCPs the ability to share a patient case with an appropriate specialist, GP-colleague, HCP, or disease supporting role for additional insights.

From the Patient Dashboard screen, click [Other Actions] > [Specialist Review].

The list of HCPs that can access the patient's information will appear.

419064 8931 47 Old Mill / 30pm +44 0800 354 6000 Patient Settings

Activities to be taken

- Signs of major hypoxemia detected 05/10/2022
- Signs of major hypoxemia detected 05/10/2022
- Signs of major hypoxemia detected 11/10/2022
- Significant oxygen saturation dropped 11/10/2022
- Significant oxygen saturation detected 11/10/2022
- Signs of major hypoxemia detected 11/10/2022
- Pulse changed over time 11/10/2022
- Significant oxygen saturation dropped 11/10/2022

View History

Other Actions

Options is available in 8 preparation for Heart Failure

Programme name	Type	Modification
Heart Failure	Standard Monitoring Programme	

Blood Pressure 120/103 mmHg Pulse 129 bpm

To add a new Specialist Review request, follow the steps below.

### 1 Click [Request Specialist].

Henry Taylor  
Specialist Review

This list is for patient-specific specialist reviews and allows you to set up conversations with other external health care environments and view the conversation history.

Name of GP HCP	Practice Name	Access Granted Since	Number of Pending Requests	Date of Last Request	Date of Last Response
Amy Williams	Broadwalk GP Practice	06/12/2022	2	20/12/2022	20/12/2022

Open Review Revoke Access New Request

- 2 Select an HCP and practice name from the dropdown list and enter the title and notes, then click [Request Specialist].

- The action card will be sent to the HCP you specified. Now the HCP has been added to the Specialist Review list.

- 3 The HCP whom you have requested a Specialist Review for will receive an action card informing them so. As an HCP who received a Request Specialist Review, click the action card, enter your comments and click [Respond].

- The action card will be sent to the HCP who requested your overview.

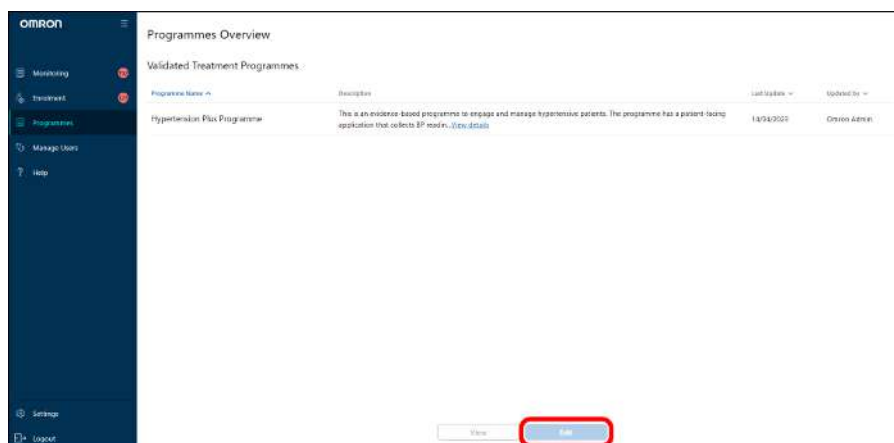
- 4 When you received the action card, click it and check the comment.

- If you need to send further comment to the HCP, add comments and click [Respond]. The action card will be sent to the HCP.
- If you do not have any further comment, click [Clear Alert]. If this is the only or last open Specialist Review you had sent to the specialist/HCP-colleague, their access to this patient is automatically revoked. To remove the HCP-colleague's access while there are still pending referrals, go to the Specialist Review list, click [Revoke Access].

# Managing Programmes

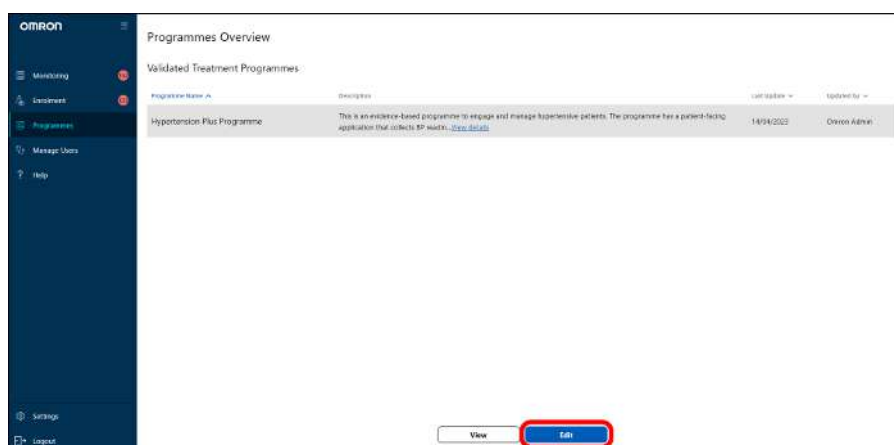
**Validated Treatment Programmes:** Based on validated clinical studies and national guidelines, these programmes provide automated decision support and treatment recommendations. There are 2 options when enrolling a patient for this type of programme.

1. "Monitoring Only" for quicker registration of patients who do not need to be enrolled with a medication plan. The medication plan can be added later.
2. Monitoring + Titration" for when a patient should be enrolled with a medication plan.



## Validated Treatment Programmes

- 1 Select a programme of "Validated Treatment Programmes" and click [Edit].



- 2 Edit the frequency of measurement and alert threshold of blood pressure and pulse, then click [Next].

**Hypertension Plus**

This programme support with monitoring of hypertension patients. Alerts for all monitoring parameters is provided.

**Monitoring**

This is an evidence-based programme to engage and manage hypertensive patients. The programme has a patient-facing application that collects BP readings and answers to lifestyle and symptom questionnaires. An alert is sent to the clinician dashboard to view and action alerts that may be triggered by these. Out-of-limit readings or answers are further qualified by questionnaires designed to pick up serious illness. If identified, the programme will automatically signpost the patient to more urgent care services.

Additionally, the programme's clinical decision support tool will identify patients with uncontrolled hypertension and automatically recommend the next best step in medication titration, based on NICE treatment algorithms.

**WARNINGS:** This programme is NOT suitable for patients with postural drop or postural hypotension. NCP users are not allowed to proceed with registration for these patients.

The titration recommendations are NOT suitable for a patient who has any of the following conditions:

1. women who is pregnant, breastfeeding or considering pregnancy
2. patient with postural drop or postural hypotension

**Blood Pressure**

Alert Threshold:

Diastolic: Upper limit: 115 mmHg [Reset to Default](#)

Threshold for red/high priority alert:

Systolic: Upper limit: 210 mmHg Lower limit: 90 mmHg [Reset to Default](#)

Threshold for unselected priority alert:

Systolic: Upper limit: 170 mmHg Lower limit: 100 mmHg [Reset to Default](#)

[Back](#) [Next](#)

### 3 Confirm the settings and click [Confirm].

**Hypertension Plus**

This programme support with monitoring of hypertension patients. Alerts for all monitoring parameters is provided.

**Monitoring**

This is an evidence-based programme to engage and manage hypertensive patients. The programme has a patient-facing application that collects BP readings and answers to lifestyle and symptom questionnaires. An alert is sent to the clinician dashboard to view and action alerts that may be triggered by these. Out-of-limit readings or answers are further qualified by questionnaires designed to pick up serious illness. If identified, the programme will automatically signpost the patient to more urgent care services.

Additionally, the programme's clinical decision support tool will identify patients with uncontrolled hypertension and automatically recommend the next best step in medication titration, based on NICE treatment algorithms.

**WARNINGS:** This programme is NOT suitable for patients with postural drop or postural hypotension. NCP users are not allowed to proceed with registration for these patients.

The titration recommendations are NOT suitable for a patient who has any of the following conditions:

1. women who is pregnant, breastfeeding or considering pregnancy
2. patient with postural drop or postural hypotension

**Blood Pressure**

Alert Threshold:

Diastolic: Upper limit: 115 mmHg

Threshold for red/high priority alert:

Systolic: Upper limit: 210 mmHg Lower limit: 90 mmHg

Threshold for unselected priority alert:

Systolic: Upper limit: 170 mmHg Lower limit: 100 mmHg

[Back](#) [Confirm](#)

**Hypertension Plus**

This programme support with monitoring of hypertension patients. Alerts for all monitoring parameters is provided.

**Monitoring**

This is an evidence-based programme to engage and manage hypertensive patients. The programme has a patient-facing application that collects BP readings and answers to lifestyle and symptom questionnaires. An alert is sent to the clinician dashboard to view and action alerts that may be triggered by these. Out-of-limit readings or answers are further qualified by questionnaires designed to pick up serious illness. If identified, the programme will automatically signpost the patient to more urgent care services.

Additionally, the programme's clinical decision support tool will identify Patients with uncontrolled hypertension and automatically recommend the next best step in medication titration, based on NICE treatment algorithms.

**WARNINGS:** This programme is NOT suitable for patients with postural drop or postural hypotension. NCP users are not allowed to proceed with registration for these patients.

The titration recommendations are NOT suitable for a patient who has any of the following conditions:

1. women who is pregnant, breastfeeding or considering pregnancy
2. patient with postural drop or postural hypotension

**Blood Pressure**

Alert Threshold:

Diastolic: Upper limit: 115 mmHg

Threshold for red/high priority alert:

Systolic: Upper limit: 210 mmHg Lower limit: 90 mmHg

Threshold for unselected priority alert:

Systolic: Upper limit: 170 mmHg Lower limit: 100 mmHg

**Programmes updated**

Programmes updated without any problems.

[Close](#)

[Back](#) [Confirm](#)

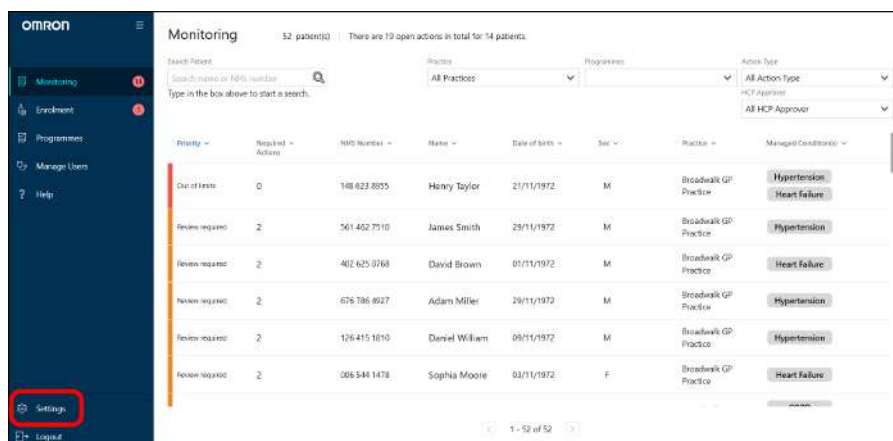
#### Note

- These settings will be used when "Monitoring Only" is selected as Validated Treatment Programme.

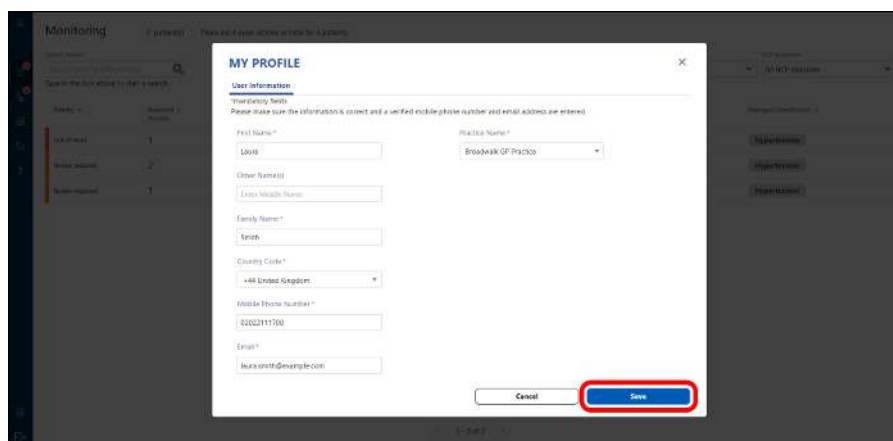
# Managing Users

## Edit Your Own Profile

- 1 Click [Settings] on the lower left of the screen.



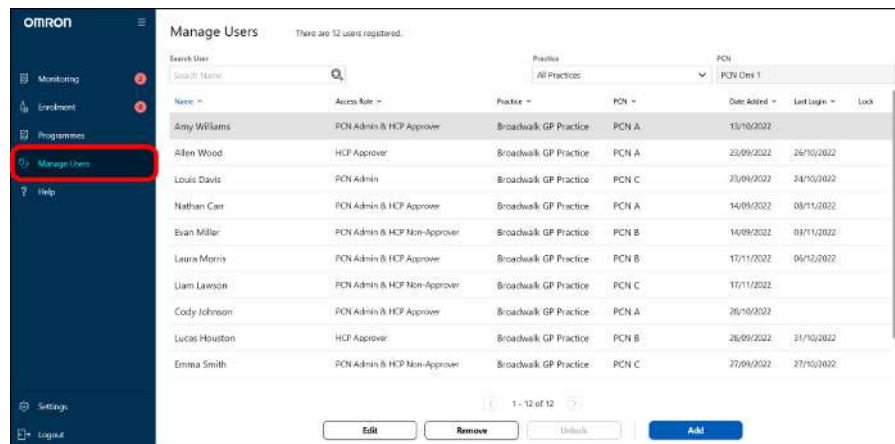
- 2 Modify your information and click [Save].



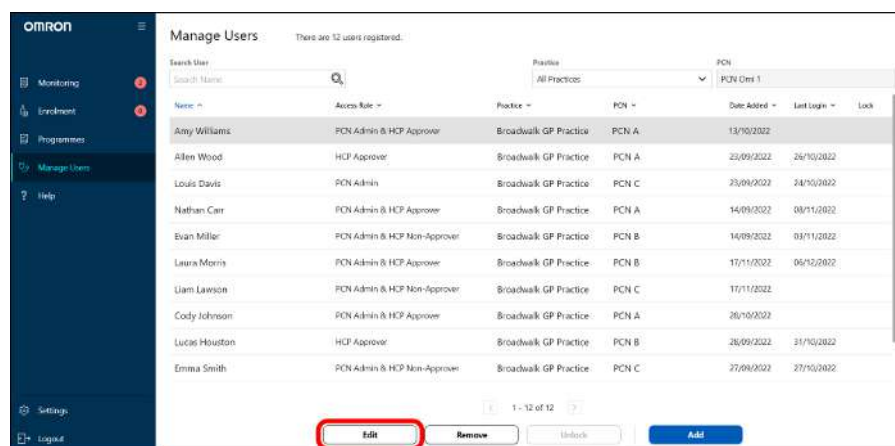
## Edit Users

Only an administrator can edit user information.

- 1 Click [Manage Users].



## 2 Select a user and click [Edit].



## 3 Modify the information and click [Save].

← Amy Williams

Details | Access Role

Mandatory fields are marked with \*.

First Name \* Amy Practice \* Broadwalk GP Practice

Other Name(s) Enter Middle Name PCN \* PCN A

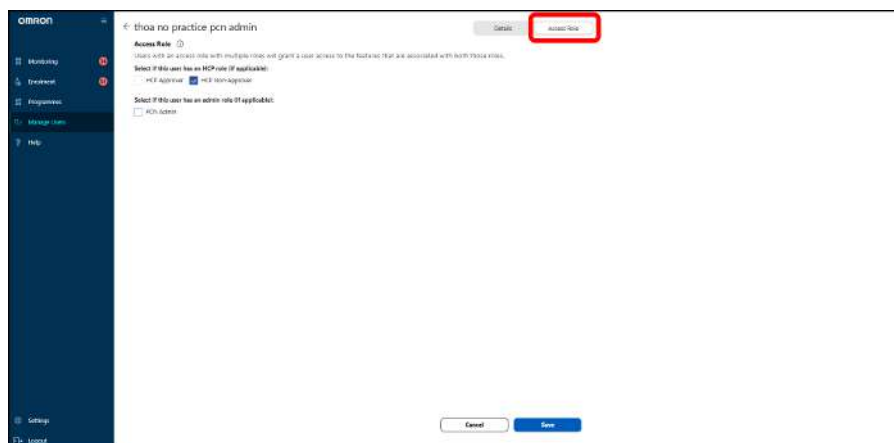
Family Name \* Williams

Country Code \* Mobile Phone Number \* +44 United Kingdom 07985332410

Email \* amy.williams@example.com

Cancel Save

- If the user's access role should be changed, click [Access Role] and select a role.



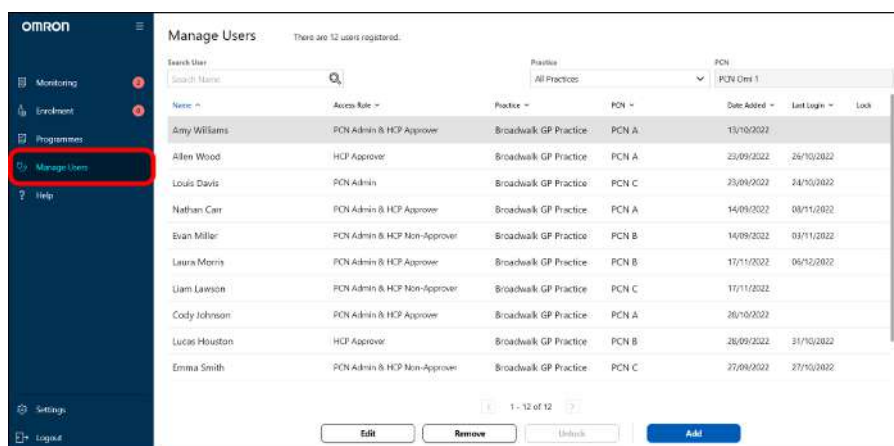
## Note

- If the user's role is changed to "HCP Approver" or "HCP Non-Approver", "EDIT HEALTHCARE PROFESSIONAL USER" screen will appear. To determine which patient's information the user can access, select HCP approver(s). The user can access the information only of the selected HCP approver's patient.
- At least 1 HCP approver and 1 admin user must exist.
- If any user enters password incorrectly multiple times, such user will be locked to logging in. For such case an admin user can unlock the user by selecting the username and clicking [Unlock].

# Delete Users

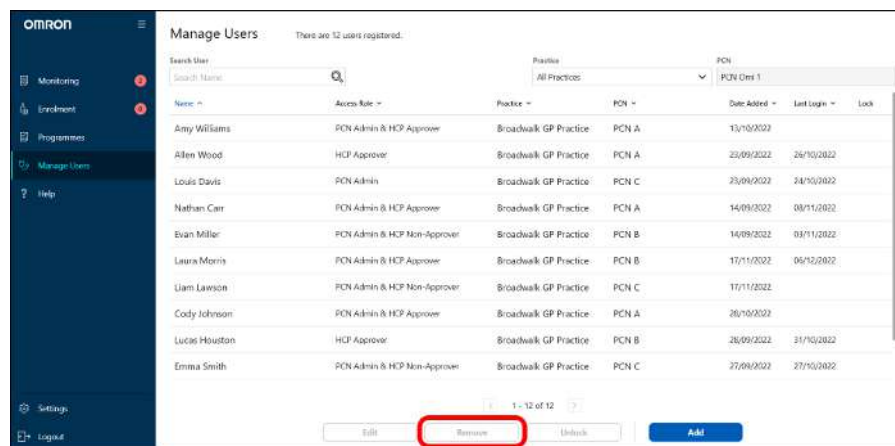
Only an administrator can delete user information.

## 1 Click [Manage Users].

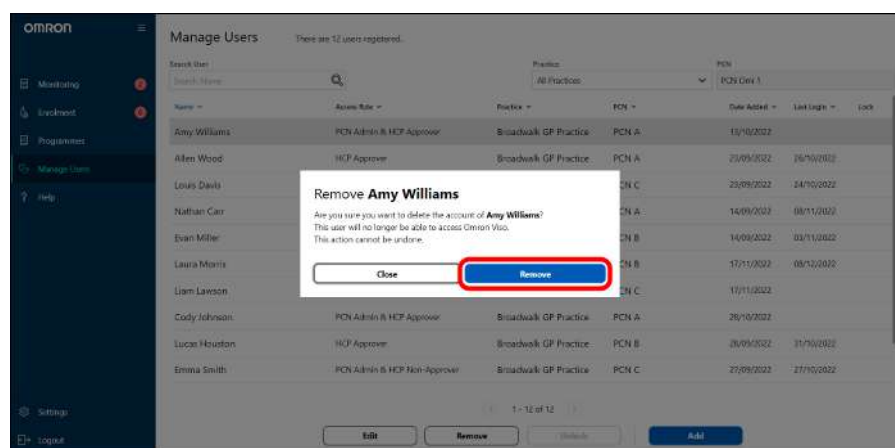


## 2 Select a user and click [Remove].





### 3 Confirmation screen appears. Click [Remove].



### If deleted user is a HCP approver and HCP approvers are more than 1:

"Assign Patients to New Approver" screen appears. Select a new HCP approver for the deleted HCP approver's patient(s).

### If deleted user is a HCP approver and HCP approver is only 1 person:

The user information cannot be deleted. To delete it, create another HCP approver's account.

### If deleted user is an administrator and administrator is only 1 person:

The user information cannot be deleted. To delete it, create another administrator's account.

Please Note: If an HCP Approver shared their unique registration link with patients to sign up for Viso, this link will no longer be valid if the user is removed or changing PCNs. Please contact Viso Customer Support to receive a new registration link.

# FAQ

## ■ Registration, Log-in and System Errors

### I have not received an SMS (text message) verification code, what should I do?

---

Check that your mobile phone is switched on, is connected to your network provider, and has sufficient signal and click [Resend Code] on the verification screen in Viso. If you still do not receive the verification code by SMS contact OMRON Customer Service.

### Can I log in to the Viso system with the user account on multiple devices simultaneously?

---

It is possible to log in to Viso on multiple devices simultaneously. However, please be aware that you may need to manually refresh your browser in order to replicate changes across the logged in accounts.

### I am not able to log in to the Viso system. What should I do?

---

Step 1: Check that you are attempting to log in with the correct email address and password.

Step 2: If you have forgotten your password, request a password reset: On the Viso login page, click "Forgot Password?". If your email address is registered in Viso we will send you instructions on how to reset your password.

Step 3: If you do not receive a reset password link by email, confirm with the designated administrator at your GP Practice that your account has been properly created and that your email address and phone number have been entered correctly.

Step 4: If you are still not able to log in to Viso, please contact OMRON Customer Service.

### What is needed for patients to use NHS login to access Viso?

---

NHS login is the secure way to sign-in to a wide range of health and care services. Patients can simply and swiftly sign-in with health and care apps and websites that have the NHS login button.

To get NHS login, patients need to have:

- Email address and cell phone number matching what is listed in the patient electronic medical record
- High level identity verification from the NHS
- Data for additional identification: date of birth / NHS number / name / postcode

How to set up an NHS login?: [How to set up NHS login](#)

### The Dashboard does not seem to be loading or displaying properly, what should I do?

---

Viso has been designed, tested and validated for use with the specific browser. Ensure that you open Viso with them. See "Compatible OS and Browser [▶ 4]" for detail.

Still experiencing problems? Please contact OMRON Customer Service.

---

## Viso is showing an error. What should I do?

---

Follow the instructions on screen to resolve the error. If the error still appears, contact OMRON Customer Service.

---

## What is an ODS code?

---

An ODS code (also known as an Organisation Data Service code) is a unique code created by the Organisation Data Service within NHS Digital, and used to identify organisations across health and social care data services. Viso requires the ODS code of your practice to integrate with existing services such as the EMR (electronic medical record).

---

## How do I find my ODS Code?

---

Your Practice IT lead should have this information. If not, you can look up the ODS code for your practice from the following address: <https://odsportal.digital.nhs.uk/Organisation/Search>

Type in the relevant search criteria for your organisation such as address, postcode and name. If multiple results are shown and you are uncertain which one belongs to your organization, you may contact the Digital and Social Care help line at: 0208 133 3430 (Mon-Fri 9-5) or [help@digitalsocialcare.co.uk](mailto:help@digitalsocialcare.co.uk).

---

## Which kind of data will be transferred by EMR integration?

---

Transfer of data from the EMR will only take place after you have invited a patient to join Viso and they have consented to use the service (OMRON will manage the consent process but we do not store personal data until we have received patient consent). Patient demographics and medical records relevant to the treatment of hypertension will be transferred from the EMR to Viso.

Once a patient is fully registered Viso will transfer all actions and decisions made by a healthcare professional on the dashboard back into the EMR as a date stamped "visit record".

The average blood pressure recorded by a patient during their "measurement week" (series of morning and evening blood pressure readings taken over the course of 1 week) will be recorded in the EMR as a SNOMED coded data entry point.

---

## What are the supported electronic medical records in Viso?

---

Currently integration with EMIS and TTP SystmOne are supported. Support for other EMR providers may be added in the future.

---

## Which SNOMED codes are used by Viso when importing and exporting data from the EMR?

---

[Click here](#) to download the complete list of SNOMED codes used by Viso when importing and exporting data from the EMR.

---

## Can I enrol /add a patient to the Programme who has laptop/computer only?

---

Viso patient app can only work with iOS 13 or higher/Android OS 10 or higher.

## How Can I view the patient data collected in Hypertension Plus in my Viso Dashboard?

---

The data collected in Hypertension Plus will be migrated to Viso Dashboard. You can view blood pressure recordings, history of each action cards and history of monthly report via corresponding sections in detailed patient screen.

## Managing patients in Viso

### Can I view comments added by other HCPs in Viso?

---

When a user is assigned as role HCP non-Approver, the user may enter comments that can be viewed by an HCP-Approver at the time of approval, for example, the rationale for a recommended change in treatment plan. Comments entered when resolving an action card can also be accessed by any user, who has the right to manage the patient, from the "View History" page from the detailed patient screen.

### Can I send a message to patients in Viso?

---

Viso is not intended to be used as a two-way messaging platform with patients. However, it is possible to send a request to your patient that they contact you or make an appointment to visit you. You can add a personalised message to this alert. See "Request Patient's Contact [▶ 32]".

### What is the purpose of the monthly questionnaire?

---

The monthly questionnaire serves 2 purposes:

1. The questionnaire is an opportunity for patients to reflect on their behaviours and lifestyle choices over the past month
2. The questionnaire gives HCPs an insight into the patient lifestyle and behaviours

The monthly questionnaire is completed by patients at the start of their measurement week. When Viso makes a recommendation to move to the next step in a medication plan, the results of the monthly questionnaire will be summarized and displayed alongside the recommendation, to support HCP decision making.

### How can I view the monthly questionnaire?

---

The latest questionnaire can be viewed in the patient dashboard section of Viso. See "View Detailed Monitoring Overview [▶ 30]".

When Viso makes a recommendation to move to the next step in a medication plan, the results of the monthly questionnaire will be summarized and displayed alongside the recommendation, to support HCP decision making.

### A patient has asked to update their name or date of birth in Viso, how do I do this?

---

To ensure that Patient records are not lost, patients and you are not able to update their name and date of birth in the app. To update this patient information, please contact OMRON Customer Service.

---

## There has been a change in co-morbidities for my patient, how should I manage this?

---

Changes in co-morbidities or medical history, or drug intolerances could affect the treatment recommendation. To edit the patient's record see "Edit Patient Information [▶ 29]". Always check whether the patient's treatment plan is still valid after a change in patient information has been made.

---

## A patient has requested to be removed from Viso. How do I do this?

---

You can remove the patient information in the patient settings page. See "Edit Patient Information [▶ 29]" for details.

---

## How many programmes can I enrol a patient into?

---

There is no limitation in the number of programmes. If a programme is added that is contra-indicated with an existing programme, Viso will give the HCP a warning and caution.

---

## A patient has requested to change medication step in the Dashboard. How can I change this?

---

Can be proceeded by edit treatment plan from Hypertension validated titration programme, or edit treatment plan by a generated medication relevant action card.

# The Review Cycle in Hypertension Plus

---

## What is a Measurement Week?

---

NICE Hypertension Guidelines recommend that blood pressure should be taken in the morning and evening for at least 4 days, ideally for 7 days to achieve an accurate average blood pressure reading. The Hypertension Plus Programme uses the concept of the "Measurement Week" to prompt patients to measure and record their blood pressure during the morning and the evening 1 week each month or 1 week every 6 months. The average reading from these measurement weeks is used to determine whether a patient has their blood pressure under control.

If a patient records an average blood pressure above their target, Viso will trigger an action to the HCP with a recommendation to move to the next step in the patient's treatment plan. If a patient records an average blood pressure below their target, the patient will be encouraged to continue taking their medication according to the current step in their plan.

---

## What happens if a patient misses a measurement during their Measurement Week?

---

If a patient misses a measurement, they should continue to measure as normal in the subsequent days. Viso will automatically extend the measurement week by up to 7 additional days to ensure that enough data is collected.

---

## What happens if a patient does not complete their Measurement Week?

---

If a patient does not submit any measurements, their Measurement Week is marked as "missed". The patient will continue their current medication step until the next Measurement Week (28 days after the start of their previous week). If a patient does not complete enough measurements within 14 days, their Measurement

Week is marked as “incomplete”. An action card will be triggered for you to review the data that your patient has submitted and decide if any action should be taken. With an Incomplete Measurement Week action card you can still move a patient to the next step of their treatment plan if desired.

## Why do some patients record less measurements during their Measurement Week?

---

NICE Guidelines for hypertension recommend that blood pressure should be taken in the morning and evening for at least 4 days, ideally for 7 days. The default Measurement Week in Viso consists of 14 measurements. However, if the patient's blood pressure is >5 mmHg above or below than their target after 8 sets of readings, Viso may stop the Measurement Week early, because there is sufficient confidence that the actual blood pressure is well known.

## How is the start of a blood pressure Measurement Week determined?

---

A patient is started on a 1-month Measurement Week cycle by default. This means that their Measurement Week will start on a Saturday, 28 days after the start of the previous Measurement Week. The following cases may change this duration:

- If the patient has 2 consecutive Measurement Weeks with controlled blood pressure –this is either marked by their doctor for incomplete Measurement Weeks or achieved when a patient's blood pressure is within target for completed Measurement Weeks – they will be moved to a 6-month measurement cycle. Their next Measurement Week will start on a Saturday 6 months after the previous Measurement Week.
- If the patient misses a Measurement Week, or records a Measurement Week above target, they will be moved back to a 1-month Measurement Week cycle.
- When a patient begins a new medication step, they can be requested to confirm the receipt of their medication (this option is a non-default setting) and update their medication schedule. The next Measurement Week will always start on the next Saturday following a 21-day period where the patient should be taking the new medication.

## What happens if a patient misses a scheduled measurement (f.e. for capillary BGM/SpO2)?

---

If just the single daily required measurement, patient can take measurement for the next day. Based on HCP users' instruction, patient can takes required measurement within the new programme review cycle.

## Where can I find the historical data measurements from my patient?

---

The history raw data can be viewed in detailed monitoring overview screen by clicking view all measurements button on each graphs.

## What drug intolerance will be signalled in the menu?

---

Drug intolerance need to be added when enrolling a patient. If Viso is connected to the EMR of your clinic, this information will be available while completing the patient enrolment but can also be added manually with "Patient Settings".

## Can I use multiple monitoring programmes for a single patient?

---

Yes, you can add multiple monitoring programme for a single patient.

---

## Can I unsubscribe a patient from a monitoring programme (while continuing others)?

---

You can remove a programme for monitoring from your patient. Historical information will not be lost. Your patient will no longer be prompted to do activities or tasks within the app.

---

## Will the data be lost after having described a patient from the programme?

---

Data history will remain in the system and data that has been shared within EMR will be still available as this might be scope of the decision making of treatment.

---

## Can I change the responsible HCP of a patient into another HCP (based upon transfer/leave etc.)?

---

Yes, you can change assigned HCP approver for a certain patient in patient setting screen, or you can require ICS or PCN admin to change the responsible HCP approver when they remove the user.

---

## How can I change target BP/capillary BGM/SpO2 measurement for an individual patient?

---

By editing related programme, you can change target by clicking manage programme button in patient detailed screen. And you will move to the corresponding programme and allow to update target values in the related screen.

---

## How can I change Alert/Alarm BP/capillary BGM/SpO2 measurement for an individual patient?

---

By editing related programme, you can change target by clicking manage programme button in patient detailed screen. And you will move to the corresponding programme and can update alert values in the related screen.

---

## Where can I find results from blood and urine test within the Dashboard Viso (from eGFR, HbA1C etc)?

---

You can find the test results in patient monitoring details screen.

---

## How can I manage specialist review request of a patient? Can I send specialist request outside of my PCN/ICS/Surgery?

---

Yes, you can manage specialist review of patient to other HCP within the Dashboard. It is not possible to send specialist request to HCP Clinical expert outside of the actual user group of Viso.

---

## What questions will be in the questionnaires during review?

---

Questionnaires and frequencies are based upon NHS guidelines for evaluation.



## How can I change review period for a patient?

---

When looking at the Patients Details screen, you can check "Manage programmes". Choose the programme you want to personalise for your patient and change the settings/frequency/threshold.

## Programme in Viso

### Can I issue prescriptions for medication in Viso?

---

At the moment, it is not possible to issue prescriptions in Viso. Please follow your standard procedure to issue a prescription. Viso can be used to notify and confirm a medication change with a patient and track medication adherence.

#### Note

- Don't forget to confirm in Viso that a prescription has been issued (you will be automatically prompted to do this). Confirming prescription creation will alert your patient to update their medication reminders in Viso and trigger the timing of the next Measurement Week (see "How is the start of a blood pressure measurement week determined?" in "The Review Cycle in Hypertension Plus [▶ 45]" section).

### The medication that I want to prescribe is not listed in Viso, can I add it manually?

---

The medication list available at the treatment plan creation phase in Viso is based on your local ICS formulary. While you will be able to select any medication in the "All Medications" screen, these will not be taken into account for the Hypertension Plus treatment plan. If you wish to add medications not currently listed, please request the change to the Viso Service Team.

### Can I change a treatment plan that has been recommended by Viso?

---

Treatment plans recommended by Viso can be fully customized. Deleting the recommendation in the "Class" field will enable you to select from all available hypertension medications in your local formulary. You may choose to set each step manually, or to modify an individual step. When modifying a step, always make sure to review the subsequent steps. Click [Recommend] to update the recommendation automatically, or continue to edit manually. To reset a manually modified step, click [Recommend].

### What steps need to happen for a new titration step to be approved?

---

Viso will recommend a new titration step when the result of the patient's blood pressure week is above target. The Action Card "Next medication Step Recommended" will be displayed in the Dashboard. Once the HCP Approver has confirmed the next titration step a message is sent to the patient to agree to the change. When the patient agrees to the medication change, the Action Card "Create Prescription" will be displayed in the dashboard. The HCP approver must confirm the creation of the prescription. This sends an alert to the patient that their prescription is available.

When the patient has collected their prescription, they confirm receipt and update their medication schedule in the Viso app. The patient will now follow their new medication plan and the titration step display in the Dashboard is advanced to the next step in the plan.



## What happens if a patient rejects a titration step?

When a patient rejects a recommended step, they are required to enter the reason for the rejection, which need to be reviewed by the HCP in the "Patient Rejected Medication Step" action card. If no further action is taken, the patient will continue their current medication until a further change is made and agreed to by the patient. If no change is made, the patient will be prompted to start their next Measurement Week 28 days after their previous measurement week began. If blood pressure is still above target at the next Measurement Week, then Viso will again recommend moving to the next titration step.

The HCP can choose to edit the titration plan and send a new recommendation to the patient (for example, to address concerns on symptoms or side-effects). The patient then has the option to approve or reject this updated recommendation in the normal way.

If a change in medication is required, but the patient does not accept the change through the app, contact the patient to resolve. You can send a contact request through the Viso system, or contact the patient in your normal way.

## What happens when the patient reaches the end of their treatment plan?

When a patient reaches the end of their 3-step plan, Viso will recommend the creation of a new 3-step plan. For patients where an automatic recommendation can be made, the recommended steps will be displayed (see "More About Creating Titration Plan [▶ 21]"). When an automatic recommendation cannot be made, the HCP can manually define the next steps in the plan.

### Note

- For patients where recommendation is possible, Viso can make recommendations up to and including NICE treatment Step 3. Further steps (if desired) must be created manually. Patients who are stable with a blood pressure below target will continue on their current medication. Viso will prompt them to monitor their blood pressure and remind them to take medication. If, in a subsequent measurement week, the patient is no longer on target, then Viso will recommend creation of a new treatment plan.

## What happens if Viso cannot recommend a new treatment step?

HCPs can make a new treatment step manually. Choose medication from the drop-down list and customise the new treatment steps without recommendations.

# Managing Users

## How to change level of responsibility /access role (allowance level to approve/admin only etc.)?

Only ICS or PCN admin can change access role for HCP users. Contact with your ICS or PCN admin for more details. If your access role is ICS or PCN admin, and you can change other HCP users role by clicking edit user button in manage user tab.

# About Viso

Model Name:	Viso
Product Category:	Application Program Software for Hypertension Analysis and Reporting
Durable Period:	6 years





Please report to the manufacturer and the competent authority of the Member State in which you are established about any serious incident that has occurred in relation to this application.

## Security Notes


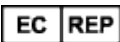
"Viso" has the following security measures in place.

- 2 factor identification: Your identity is verified by SMS (text message) to your telephone number and email address when your account is created;
- If you fail logging in to the Viso system 5 times continuously your account will be locked;
- If you do not use your account for 48 months your data will be automatically deleted;
- All communications between the app, doctor system and OMRON servers are encrypted;
- Your data is securely stored in encrypted form on OMRON's servers which have been designed manage sensitive personal data.
- In case failure to maintain SECURITY is detected, we potentially shutdown the service until the detected risk is resolved. We will notify all GPs that and recommend to support patients without our service for the time being.

## Symbols Description

	UKCA Marking
	Medical Device
	Necessity for the user to consult this instruction manual
	Date of manufacture

## Contact Information

<b>Manufacturer</b> 	<b>OMRON HEALTHCARE Co., Ltd.</b> 53, Kunotsubo, Terado-cho, Muko, KYOTO, 617-0002 JAPAN
<b>EU-representative</b> 	<b>OMRON HEALTHCARE EUROPE B.V.</b> Scorpius 33, 2132 LR Hoofddorp, THE NETHERLANDS

<b>Importer in EU</b>	<a href="http://www.omron-healthcare.com">www.omron-healthcare.com</a>
<b>Distributor in the United Kingdom and UK representative person</b>	<b>OMRON HEALTHCARE UK LTD.</b> Opal Drive, Fox Milne, Milton Keynes, MK15 0DG, UK <a href="http://www.omron-healthcare.com/subsidiaries">www.omron-healthcare.com/subsidiaries</a>

