

Uploading documents to the Oxfordshire Care Summary (OCS) for practices using Vision software

The target for this year's local initiative scheme (LIS) for Vision practices is that 50% of care plans should be uploaded onto OCS by end of July. This can be done in either of 2 ways, in order to have the patient care plans visible on the OCS.

Uploading the Care Plan directly through the OCS:

1. Log onto Case Notes
2. Search for your patient using Patient Search
(using NHS # or required information)
3. Select Patient
4. Select OxCS
5. Confirm permission to view (image below)

Please select one of the following options:

| | |
|-------------------------|---|
| Permission sought from: | Permission granted: until discharge |
| Patient |  |

6. Patient record opens
7. Select **Add Attachment**
8. Continue from Step 1 below

Uploading the Care Plan through Case Notes:

1. Log onto Case Notes
2. Search for your patient using Patient Search
(using NHS # or required information)
3. Select Patient
4. Select the **Smart Forms** option (top left of the display)
5. Select **Attachment** under frequently used documents
6. Continue from Step 1 below

For both:

1. Select **Attachments** (top right of the display)
2. Select **Browse...** and search for document
3. Select **Open** and then **Add**
4. Select **Return to form** NOTE: The form has been attached
5. Scroll down to the bottom of the screen and select appropriate attachment Type from drop-down menu
6. Select Save Draft
7. Select **Publish**
8. Select **Publish Form**
9. Select **OK**
10. Now when a clinician treats this patient, this document appears as part of their OCS clinical record

Most PCP patients will be known to Case Notes. However, should a patient not be known to Case Notes, then the document cannot be uploaded. If this is the case, notify oxfordshire.caresummary@nhs.net who will manage this as an exception.

Currently only clinical roles can upload PCP documents to Case Notes and the OCS