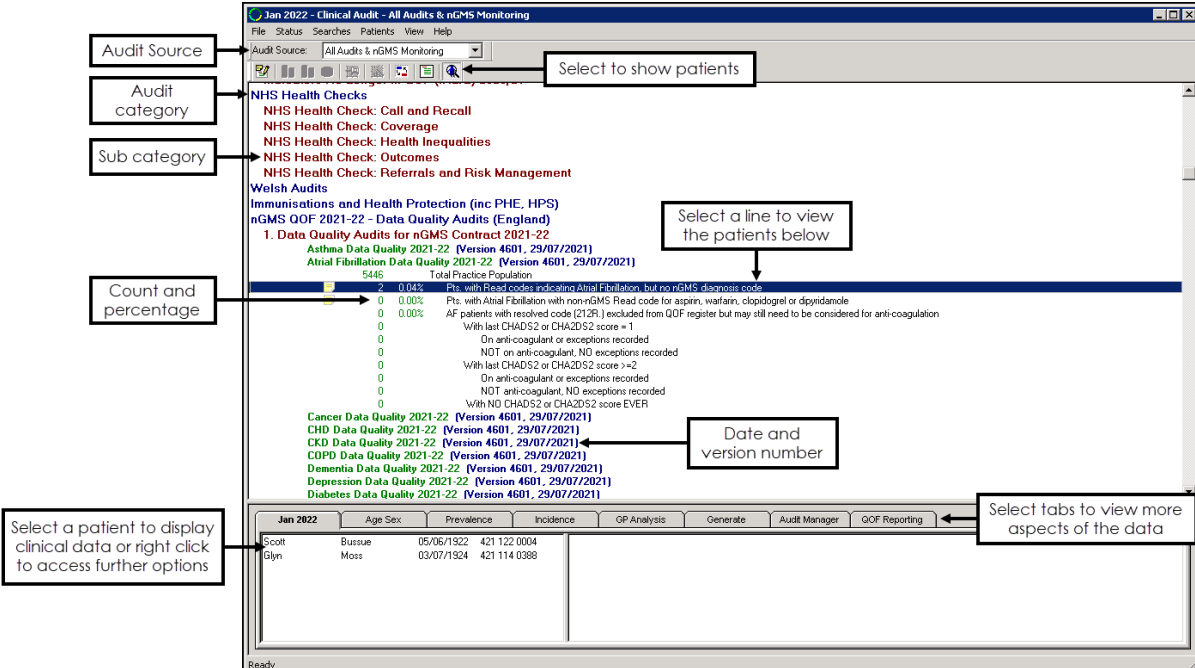# Quick Reference Guide to Clinical Audit

Clinical Audit is a powerful tool providing automatic reports designed to make it easier for you to manage the complex reporting requirements for Quality and Outcomes Framework (QOF), Quality Assurance and Improvement Framework (QAIF), Local Enhanced Service (LES), Directed Enhanced Service (DES), immunisations and other areas.

Navigating Clinical Audit

Clinical Audit provides comprehensive reports which generate automatically:

- Menu options change depending on which tab is active in the bottom section.

- Use the **Audit Source** drop-down to set the active view.

  See Overview of QOF/QAIF Audits in the **Clinical Audit Help Centre** for more information.

- The blue lines are the audit **Category**.

- The dark red lines are the **Sub category**.

- The green lines show the **Clinical category**.

- Each audit line has a date and version number.

- There are several different tabs which give different aspects of the data.

- Select an audit line to view the patients in the group, in the bottom left pane. Right click on a patient and select **Open Consultation Mgr** to open the patient's clinical record:
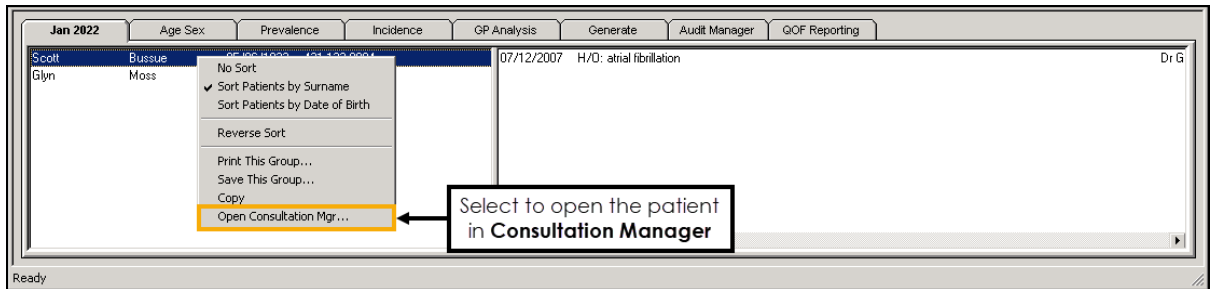
- Select and drag splitter lines to resize the tab / graph panes:
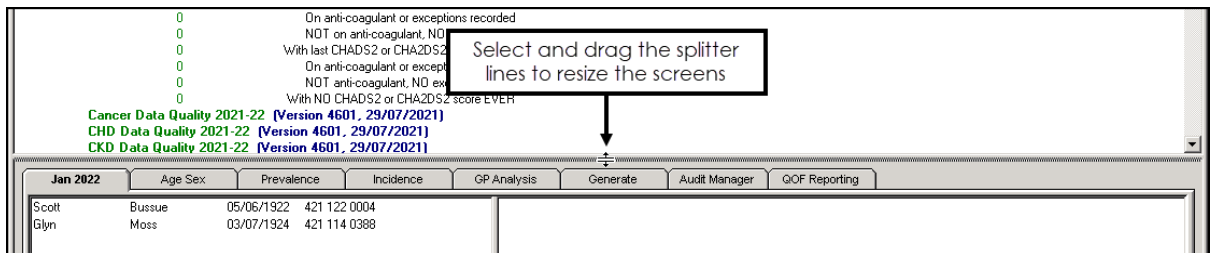
Generating Clinical Audits

Clinical Audit generates automatically each night:

- If **Generate** displays in red, the statistics are due for generation, or there are new/updated audits.

- Newly imported audits, that have yet to be run, display in red with an exclamation mark to the left of each line.

- If you have your own server (LAN), select **Continue Generation** or wait for the audit to run automatically over night.

- If you are on a hosted server, for example, AEROS, wait for the audit to automatically run over night or if urgent, contact the service desk to run sooner.

⊕ See Contacting Us for Support in the **Clinical Audit Help Centre** for more information.
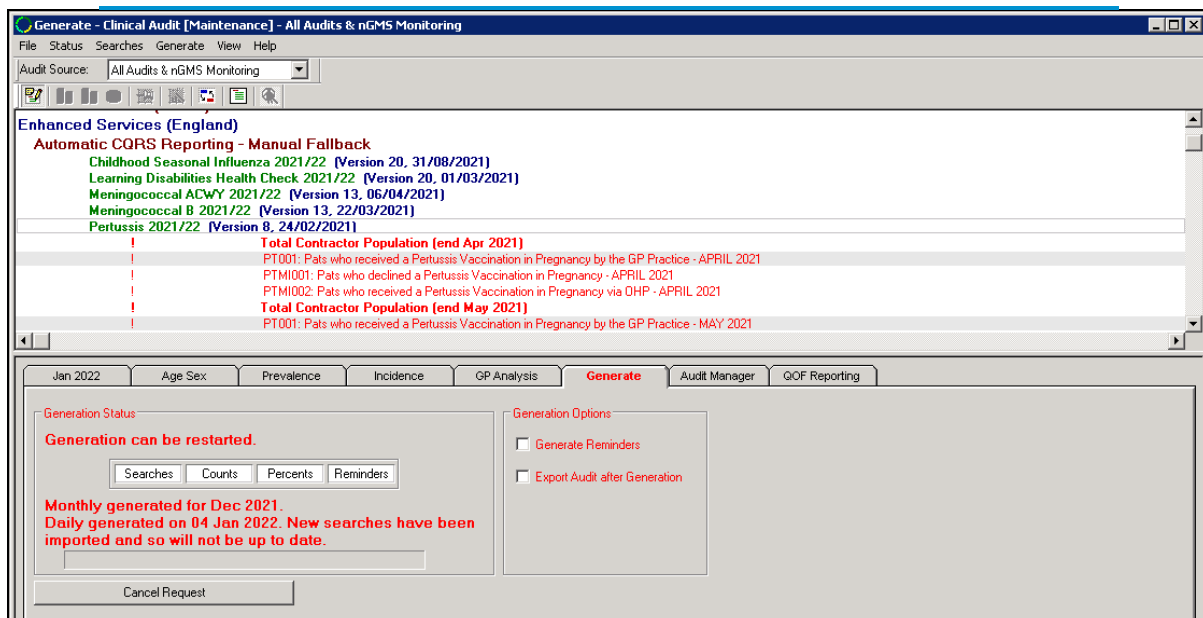
⊕ See Date Tab in the **Clinical Audit Help Centre** for more information on viewing the patients within a group.

Toolbar and Menu Options

Toolbar Options

		Description	
	Maintenance Mode	Select to enable **Import** and **Delete** options. When active the title bar displays "Clinical Audit [Maintenance]".	
	Count	Displays the prevalence chart by patient numbers.	
	Proportion	Displays patients, on the prevalence chart, as a proportion of the base population of the clinical category.	
	Percentage	Displays patients, on the prevalence chart, as a percentage of the base population for that clinical category.	
	Keep Y Axis Constant	When active, the axis of the graph you are viewing remains fixed, even if you change criteria of the graph.	
	Wizard	Select to open the graph wizard to change the graph style.	
	Order by Subject or Source	Changes the grouping of the audits.	
	Toggles full screen results	Hides or displays the Tabs at the bottom of the screen.	
	Show Patients	Displays (default) or hides the patient list for an active audit line.	

Menu Options

File

- **Maintenance Mode** - Tick to import or delete audits.
- **Exit** - Select to close **Clinical Audit**.

Status

Active on selection of an audit line:

- **Active reminder** - Activates an inactive reminder.
- **Reminder** - **Add** or **Edit** reminder text, or remove the tick from **Active** to inactivate a reminder.

  See Managing Reminders in the **Clinical Audit Help Centre** for more information.

- **Inactive** - Inactivates an audit line.

Searches

- **Patient Counts** - Displays total patient numbers for each audit line.
- **Search Percents** - Displays percentages of base population per audit line.
- **Options** - Display options for viewing searches:
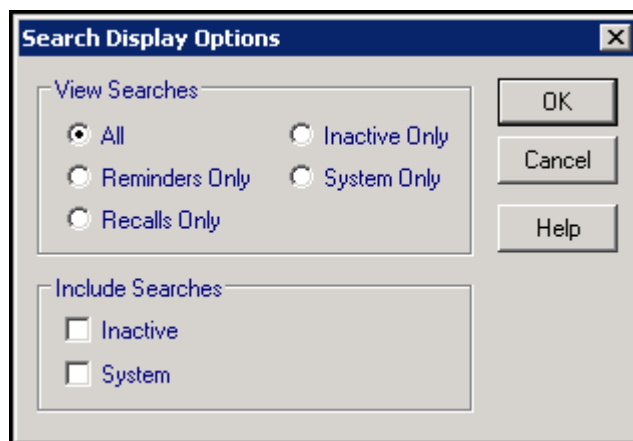
- **View Searches**:
  - All
  - Reminders only
  - Inactive only
  - Recalls only
  - System only
- **Include Searches**:
  - Inactive
  - System

- **Inactive Searches** - Includes inactive searches, these display a red cross to the left:

- **System Searches** - No longer used.

- **Order by Subject / Order by Source** - Changes the grouping of the audits by subject or source.

- **Print Preview** - Select to preview a report before printing.

- **Print** - Select to print the current view. Audit details print for expanded lines only.

- **Export Results** - Select to export the selected audit in CSV format.

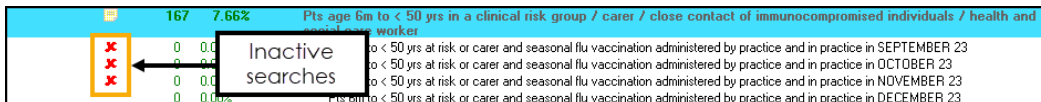- **Import Searches** - Select to import new audits. Only available when **Maintenance mode** is active.

Age Sex

- **Show Patients** - Ticked by default, displays patients for the active line in the lower left pane, remove the tick to hide the list.

- **Counts** - Selected by default, select to displays age sex graphs by patient numbers in audit group.

- **Percents** - Select to display age sex graphs by percentage of base population.

- **Percents - Adjusted for Sex Bias** - Select to display age sex graphs by percentage within one sex only. For example, this takes all the male patients and shows their percentage by age, as oppose to the proportional representation of the whole group.

- **Percents - Adjusted for Age Bias** - Select to display age sex graphs by percentage within each age group, so you can see the proportion of male and female patients.

- **Percents - Adjusted for Age & Sex Bias** - This is active if the base population selected in **%Base** is different from that on the audit group.

- **Previous Base Population** - Select the higher level base population for the age sex graphs.

- **Next Base Population** - Select the next lower level base population for the age sex graphs.

- **Export** - Export in CSV format.

Prevalence

- **Count** - Displays the prevalence chart by patient numbers.

- **Proportion** - Displays patients as a proportion of the base population of the clinical category.

- **Percentage** - Displays patients as a percentage of the base population for that clinical category.

Incidence

- **Show Patients** - Ticked by default, displays patients beneath the graph.
- **By Year** - Display chart by year.
- **By Month** - Selected by default, display chart by month.

Graph

- **Fit to Graph** - If you have zoomed into a graph, select to restore normal view.
- **Fix Axes** - Select to fix the axes of the graph you are viewing. This applies even if you change the criteria of the graph.
- **Toggle Style** - Select to change between column charts and line graphs.
- **Properties** - Select to update the way your graph looks, for example, different colours and label styles.
- **Print Preview** - Select to see how the graph prints.
- **Print** - Select to print the graph.
- **Show Net** (**Incidence** tab only) - Select to switch the display to show either the total (net) change or both the increases and decreases.
- **Show Sexes Together**, **Show Sexes Separately**, **Show Male Only**, **Show Female Only** (**Age Sex** tab only) - Select to change how the age sex graph displays.

Patients

- **Show Patients** - Include patient lists, active by default.

View

- **Toolbar** - Displays or hides the toolbar.
- **Audit source** - Displays or hides **Audit Source** options above the toolbar, this relates to the view of Quality and Outcomes Framework (QOF) / Quality Assurance and Improvement Framework (QAIF) audits.
- **Status Bar** - Displays or hides the status bar.
- **Wizard** - Displays relevant wizard to choose styles, and other options. Available when the **Age Sex** or **Incidence** tab is active.

  See Age Sex Wizard and Incidence Tab in the **Clinical Audit Help Centre** for more information.

- **Audit Line Tooltips** - Enables you to view the reminder text when you hover over it.
- **Results Only / Show Tabs** - Tick **Results Only** to hide the tabs or **Show Tabs** to display both.

Right Click Options

Depending on where you right click, the following options are available:

Audit heading / Audit sub heading

- **Include in Audit Export** - No longer used.

- **Exclude from Audit Export** - No longer used.

- **Export Results** - Select to create a CSV file.

  See Exporting Clinical Audit Data in the **Clinical Audit Help Centre** for more information.

- **Delete Searches** - Select to delete audits (available in **Maintenance** mode only).

  See Delete Searches in the **Clinical Audit Help Centre** for more information.

Audit line

- **Reminders** - Select to **Add** or **Edit** Reminder text.

  See Managing Reminders in the **Clinical Audit Help Centre** for more information.

- **Inactive** - Make audit line inactive.

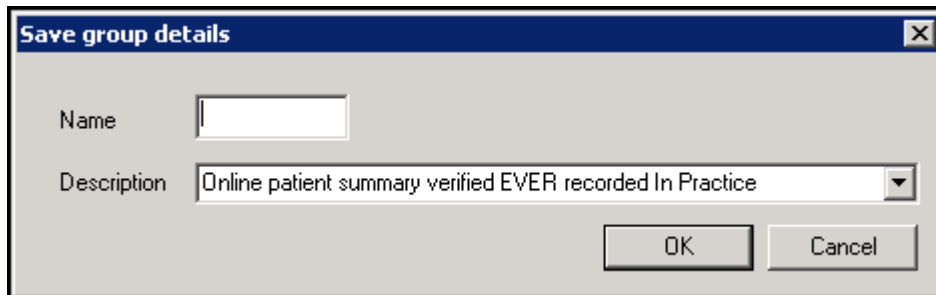- **Show Details** - To view the version number and date of an audit.

Patient list - By default the list sorts by patient NHS or CHI number, select:

- **No Sort** - Select to remove any sorting on the list.

- **Sort patients by Surname** - Select to sort the patient list by surname (A - Z).

- **Sort Patients by Date of Birth** - Select to sort the patient list by date of birth (eldest - youngest).

- **Reverse Sort** - Select to reverse the order of the patient list, for example, if they are sorted by surname (A-Z) select **Reverse Sort** to sort by surname (Z-A).

- **Print this Group** - Select to print the patient list.

  See Printing a Patient List in the **Clinical Audit Help Centre** for more information.

- **Save This Group** - Select to save the patient list as a **Vision 3 Patient Group**:

In **Name** enter a name for your group and select **OK**.

✏️ **Note** - The **Description** automatically completes with the information from the audit line.

💡 **Training Tip** - Remember all **Clinical Audits** automatically save as groups within **Patient Groups**.

➡️ See the **Patient Groups Help Centre** for more information.

- **Copy** - Select to copy the patient list to your Windows clipboard.
- **Open Consultation Mgr** - Select to open the selected patient's record in **Consultation Manager**.

➡️ See Getting Started in the **Consultation Manager Help Centre** for details.

✏️ **Note** - The **Toolbar** and **Menu** options vary depending on which tab you select.