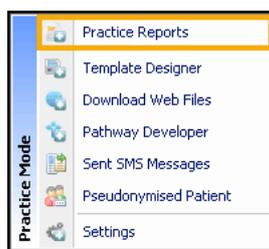# Quick Reference Guide - Contract Manager

Contract Manager is an essential tool for monitoring your practice performance over the year. Presenting an overall view of your point totals for the practice, **Contract Manager** can be used to track aspirations, help plan monthly workloads, compare year-on-year performance, show your practice prevalence and provide you with financial information. All information displayed by default uses the end of the QOF/QAIF year as the reference date so point totals are cumulative as you work through the year. Changing the **Forward Date** settings will not affect **Contract Manager**.
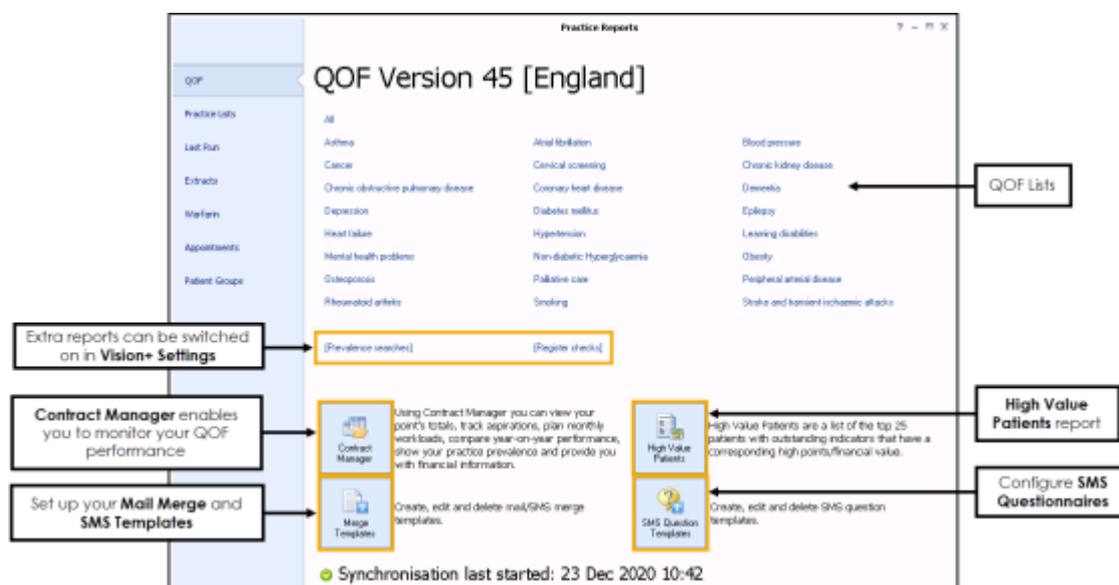
To open **Contract Manager**:

1. With no patient selected in **Consultation Manager** from the **Windows Notification Area**, right click **Vision+** and select **Practice Reports**:

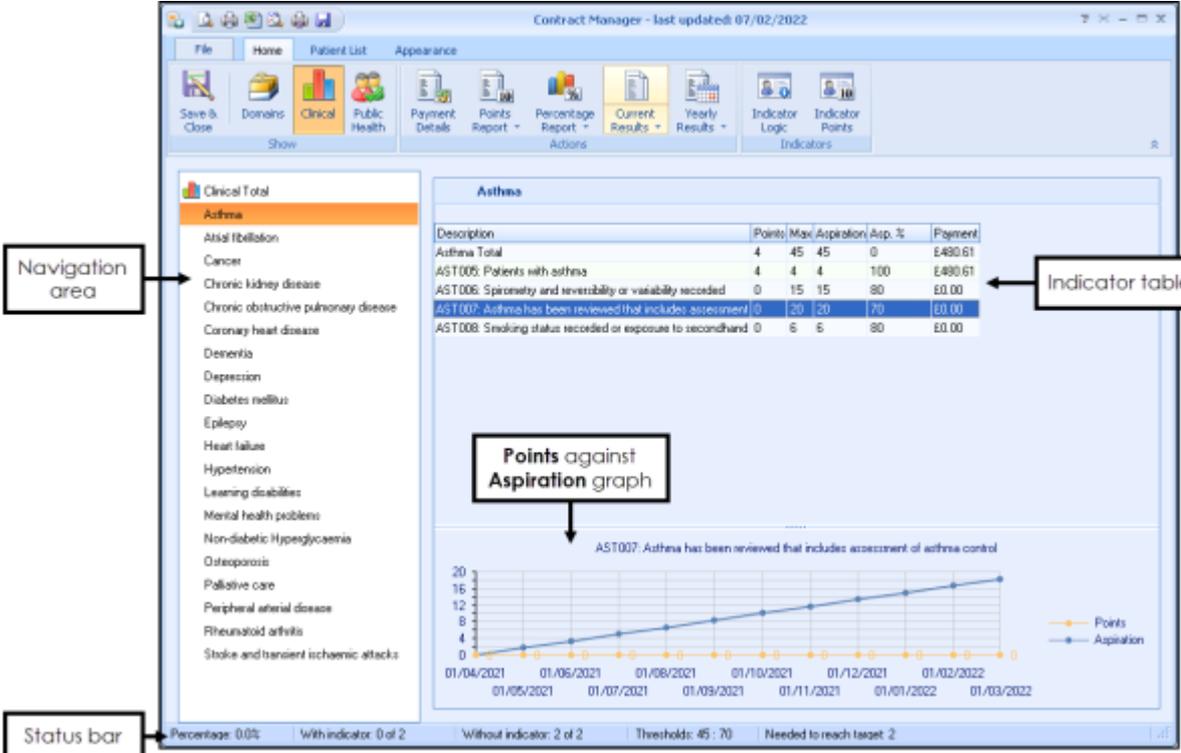2. Select **Contract Manager** from the QOF/QAIF area of the screen:

The Contract Manager Screen

The **Contract Manager** screen is divided into different sections. The title bar displays the date **Contract Manager** was last updated, and you can access the different commands and functions using the toolbar.


The **Contract Manager** screen consists of the following:

- **Navigation area** - View information in the right-hand side pane. As you click on the different domains and categories, you'll see the information on the right-hand side of the screen change accordingly.

- **Indicator table** - The upper right-hand side of the screen displays a grid showing detailed information about the indicator, current point totals, maximum possible points, your aspiration target if set, and the expected payment (which can be adjusted using the **Specifying Payment and Prevalence Information** screen).

- **Points** against **Aspiration** graph - As you select the different indicators within the grid, the charts within the lower right section of the screen changes to a graph to enable comparison of the actual points the practice has obtained to that which it aspires to. You can also use the chart to view the historical trends for the points for the particular indicator you have selected in the grid. These are typically shown on a month-by-month basis for the current QOF/QAIF year.

- **Status bar** - The status bar at the bottom of the screen is a very useful tool and shows some important information relating to point thresholds for the individual domains. The status bar displays the current **Percentage**, the number of patients **With indicator**, the number of patients **Without indicator**, the upper and lower **Thresholds** for the indicator (%) and the number **Needed to reach target**. Towards the end of the contract period the number needed to reach the target can play a vital role when allocating resources for the practice to attain the maximum points possible for each category.

Updating Contract Manager

Before you can use **Contract Manager**, you must update it with information from other parts of **Vision 3**. To update **Contract Manager**, click **Current Results** on the toolbar and select **Update**.
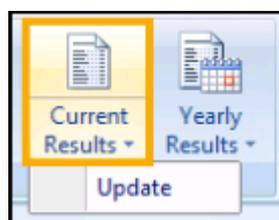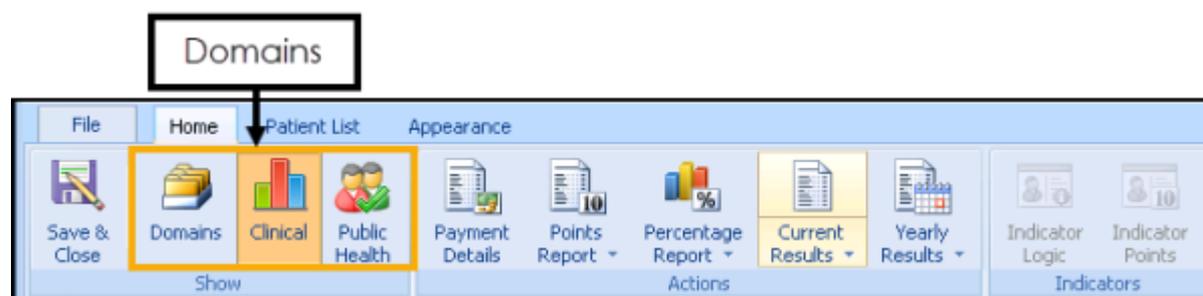
The data displayed is the current points achieved using the end of the current QOF/QAIF year as the reference date. Depending on the size of your practice, it might take a while to update **Contract Manager's** statistics. The time that has elapsed since the start of the update and the number of patients processed is shown in the progress bar.
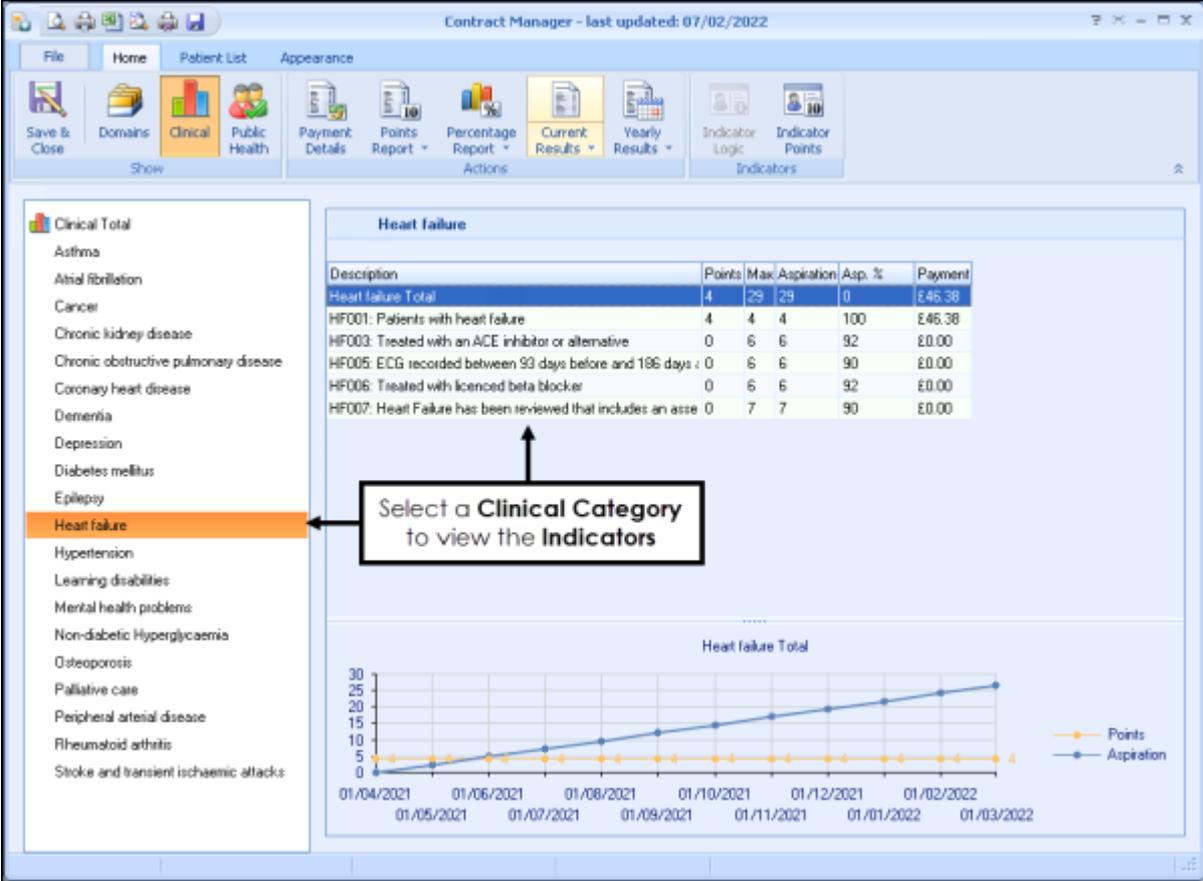
To stop the update, select **Close**.

Navigating Through the Different Contract Domains

By default, the **Contract Manager** screen displays the totals for each domain under the **Show** section on the toolbar. Select the domain in the tool bar to view more information:

When in a **Domain**, select the **Clinical Category** to view the **Indicators** in the right-hand pane:

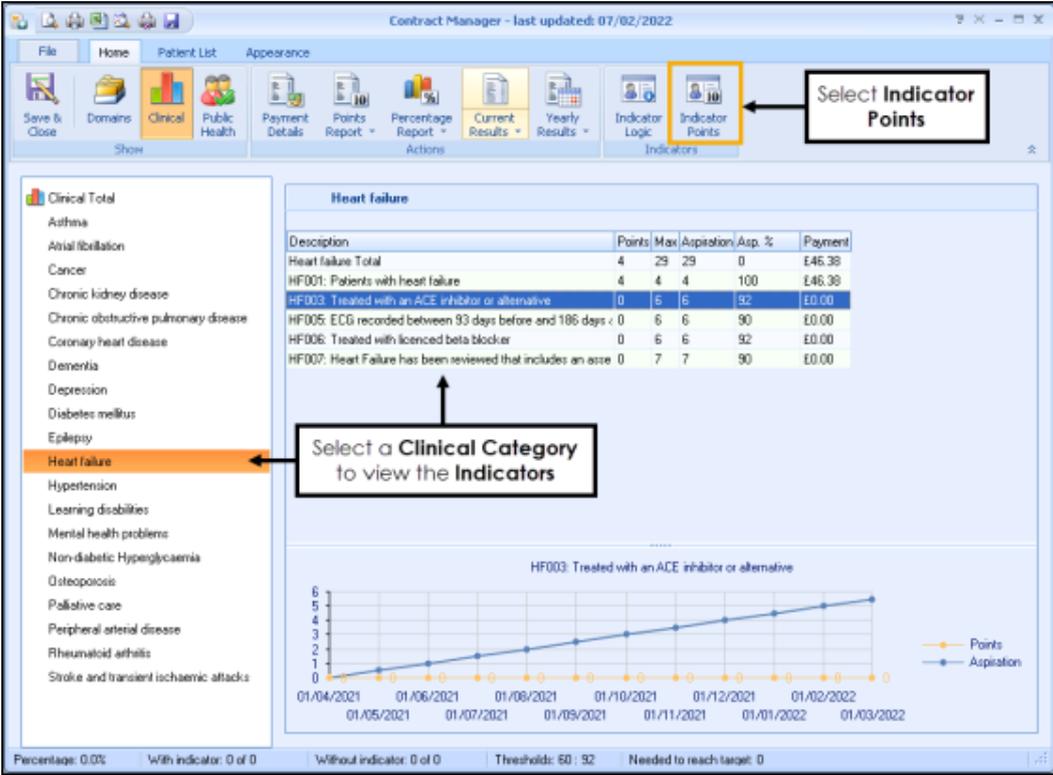# Viewing Indicator Point Statistics

You can obtain instant point calculations for any of the clinical categories, compare your actual point totals with your aspirations, and you can even filter the statistics down to individual staff members and find out who is contributing the most to your totals.

To view **Indicator Point Statistics** on the **Contract Manager** screen:

1. Firstly, select **Current Results** and then select **Update** from the toolbar. This makes sure the information is up-to-date:
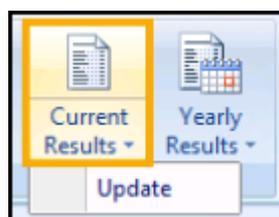
2. Select the **Domain**, **Category** and then **Indicator Description** in the right-hand pane to highlight it:

3. From the toolbar, select **Indicator Points**.

4. The **GMS Points** screen displays:

Using the Points Screen

Use the **GMS Points** screen to view your points totals. You can filter down to individual indicator points by selecting the required item in the **Indicator** list. A breakdown of the statistics displays in the summary box on the right-hand side of the screen. A helpful chart is also provided to show your point totals in graphical form.

To enter your practice aspirations for comparison with your actual totals, you first must filter down to individual indicators. Then use the **Aspiration** box to enter the value for that indicator. Your overall aspiration for the category total is based upon the values entered for individual indicators.
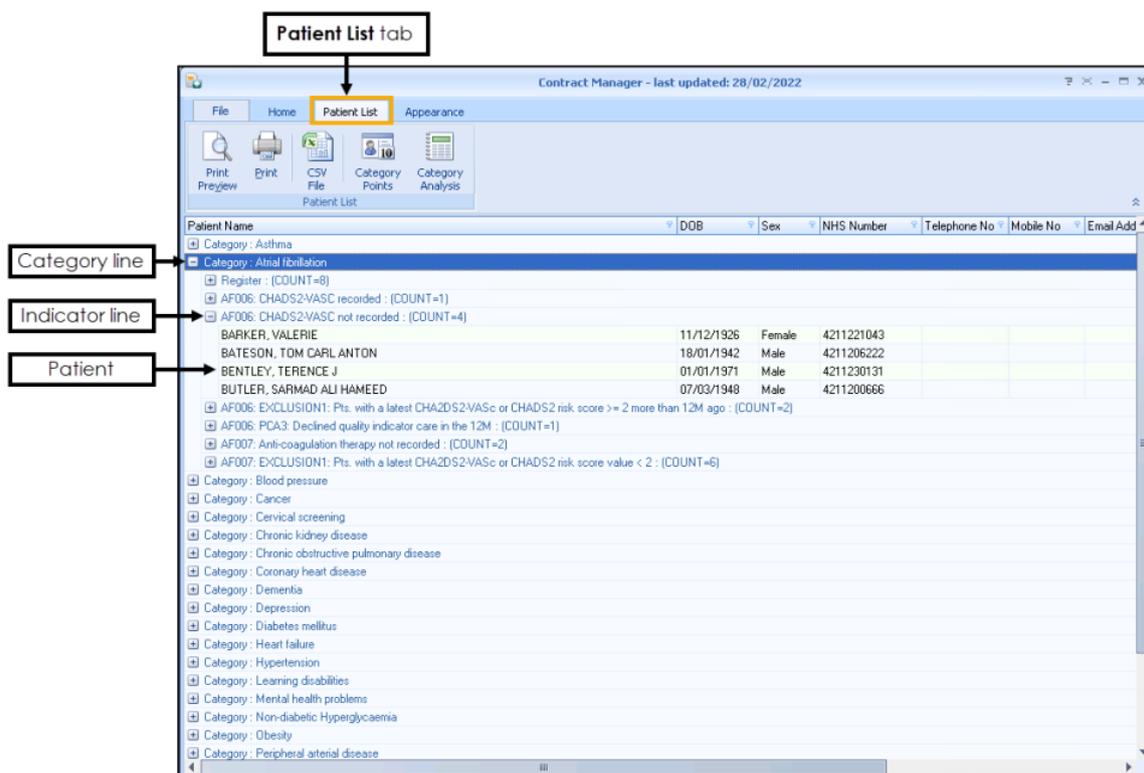
The screen also provides a method of seeing point contributions from different staff members at the practice. Use the **Staff** list to select the user name of the staff member you want to view. The chart and the breakdown summary change accordingly.

Working with Patient Lists

From **Contract Manager** you can view a list of patients who have been seen or those with outstanding indicators.

1. From the **Contract Manager** toolbar, select the **Patient List** tab.


✎   **Note** - **Patient List** is only available if you have run an update. See **Updating Contract Manager** on page **3** for more details.

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2. All the categories display below, double click the category and indicator lines to expand, depending on your selection the following display:

Category or Indicator Line

When a category line is selected the following options display on the toolbar:
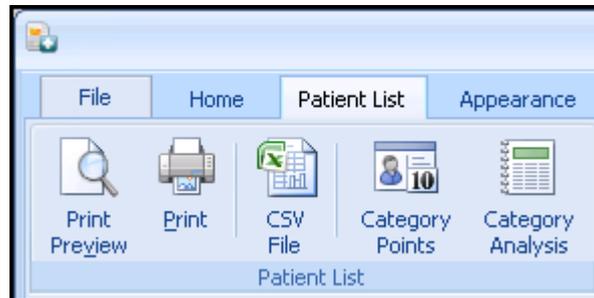
When an indicator line is selected the following options display on the toolbar:
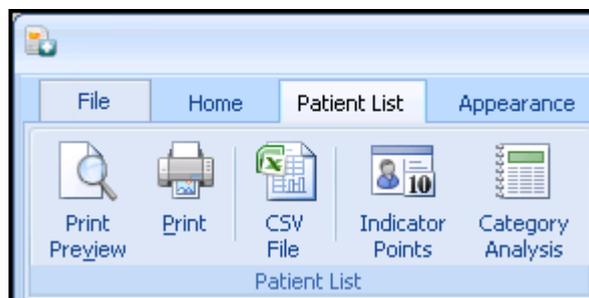
- **Print Preview** or **Print** - Preview or print the patient list.

- **CSV File** - Export the **Contract Manager** information to a spreadsheet for further analysis.

- **Category Points / Indicator Points** - Provides an overview of your category points, see **Using the Points Screen** on page **6** for more details.

- **Category Analysis** - Displays a graphical representation of your category points. To analyse further, view the analysis tab and look at specific patients and what indicators are met:

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Individual Patient

When an individual patient is selected the following options display on the toolbar:
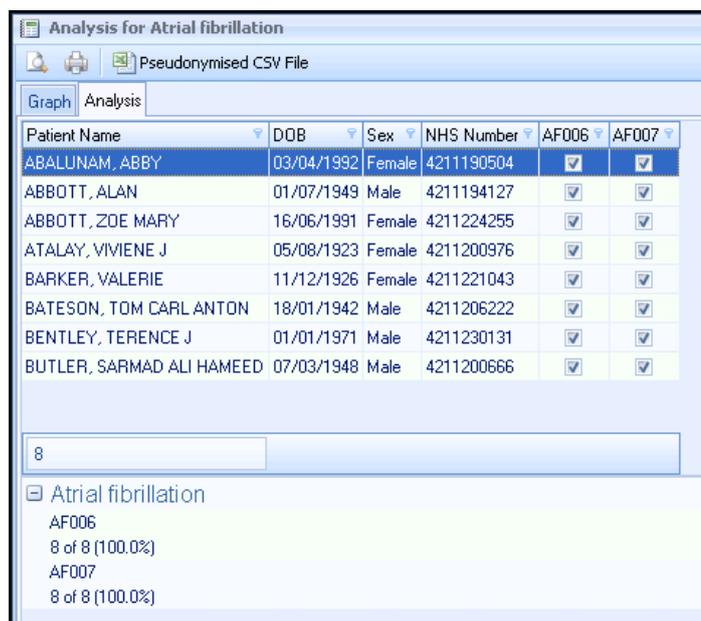

- **Print Preview** or **Print** - Preview or print the patient list.
- **CSV File** - Export the **Contract Manager** information to a spreadsheet for further analysis.
- **Open Patient** - Opens the patient's record in **Consultation Manager**.
- **Data Entry** - Depends on the indicator line, launches the appropriate data entry screen. In this example the **CHADS2-VASc** data entry screen displays.
- **Contract** - Enter information using the data entry screen for the indicator or category selected.
- **Show Template** - Launches the contract template.
- **Show Indicators** - Displays the patient's **Alert Indicator** without opening **Consultation Manager**.
- **Indicator Logic** - Display the latest business rules and logic.

Contract Manager Reports

You can access the following reports from the **Contract Manager** screen:
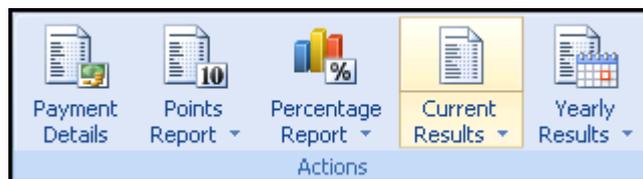
- **Payment Details** - Opens the Payment Details screen:
    - **Practice Tab** - Enables you to manually enter your pounds per point and national average.
    - **Prevalence Tab** - Prevalence information can be entered here.
    - **Additional Services** - Information on additional services can be viewed and entered here.

- **Points Report** - You can set a date and view a full breakdown of all domains. This is particularly helpful when comparing monthly reports. This report can be printed or exported to a CSV file.

- **Percentage Report** - View QOF/QAIF data in PDF format. This is particularly useful to view previous QOF/QAIF data.

- **Yearly Results** - Set a date and select **Update** to run the report. All reports are produced in PDF format and are stored. You can view the patient lists, this provides a breakdown by category and date reference.

Note - Transferred out patients are included if they were active at the time.