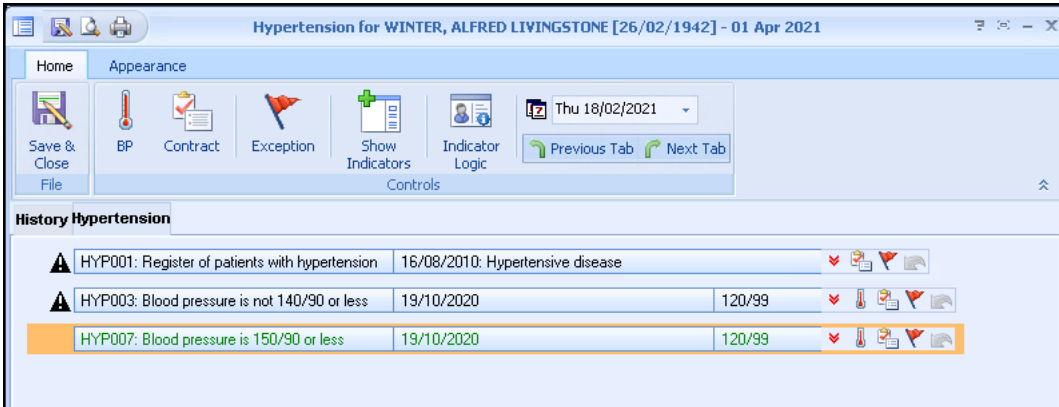# Quick Reference Guide - Vision+ Templates

Templates are designed to collect patient information in a step-by-step protocol based format.

There are two types of **Templates**:

- **QOF/QAIF Templates** - Record key information for QOF/QAIF purposes.

- **Clinical Templates** - Non-QOF or practice defined templates.

Training Tip - You can also create practice defined data entry templates for capturing and recording data within your practice, for more information see Vision+ Template Designer.

Using Templates

Templates can either be selected by:

- Highlighting any line on the alert indicator screen and selecting **Show Template** or right click and select **Show Template** . This option takes you directly to the template:

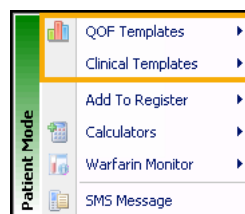- Alternatively, you can select **QOF/QAIF Templates** or **Clinical Templates** from the **Vision+** menu on the floating toolbar or from **Vision+** in the Windows Notification area. This gives you the option to view all Templates or select a specific template from the list provided:

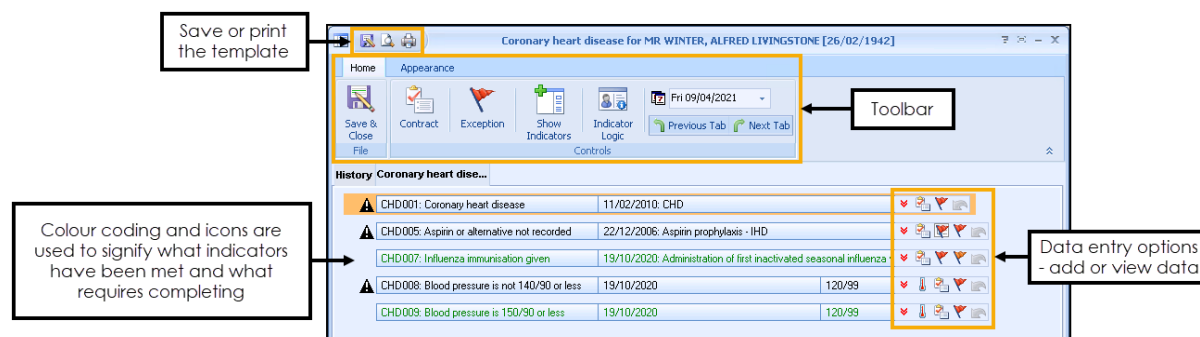   - **Vision+ Menu** on the Floating Toolbar:
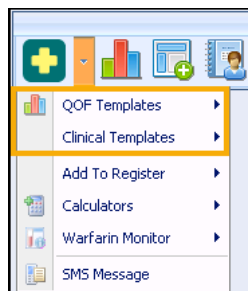
    - **Vision+ Menu** from the Windows Notification Area:

Overview of the Template Screen

The Template screens vary depending on the disease area highlighted, for example, some Templates have questionnaires on the toolbar.

Below is an example of a **Coronary Heart Disease** template:

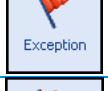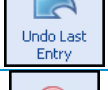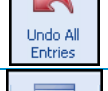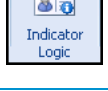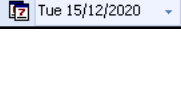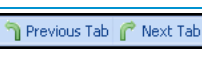
Toolbar

The Toolbar enables you to access the various functions of the template, for example, contract codes, exceptions and BP measurements. By highlighting a line, the relevant icons on the Toolbar are enabled or disabled depending on whether they are available for use.

Most of the icons on the Toolbar are duplicates of those displayed alongside each category, the exception to this is the Indicator logic icon option that displays on the toolbar only:
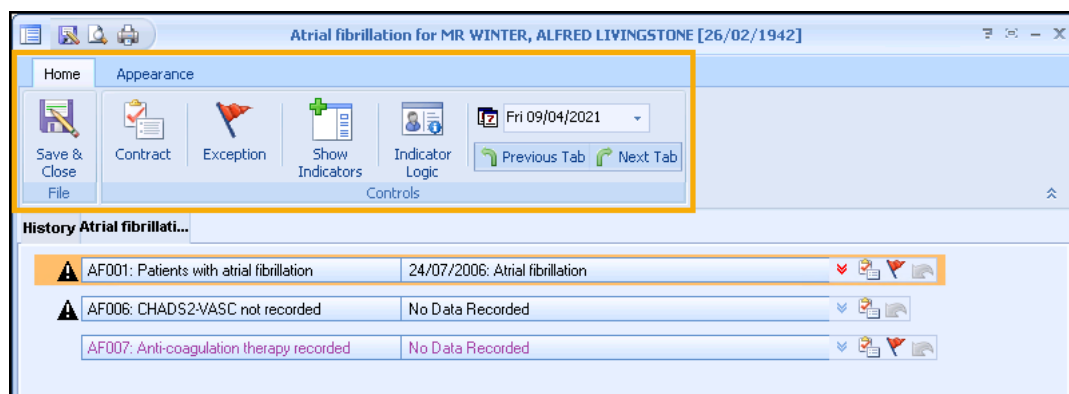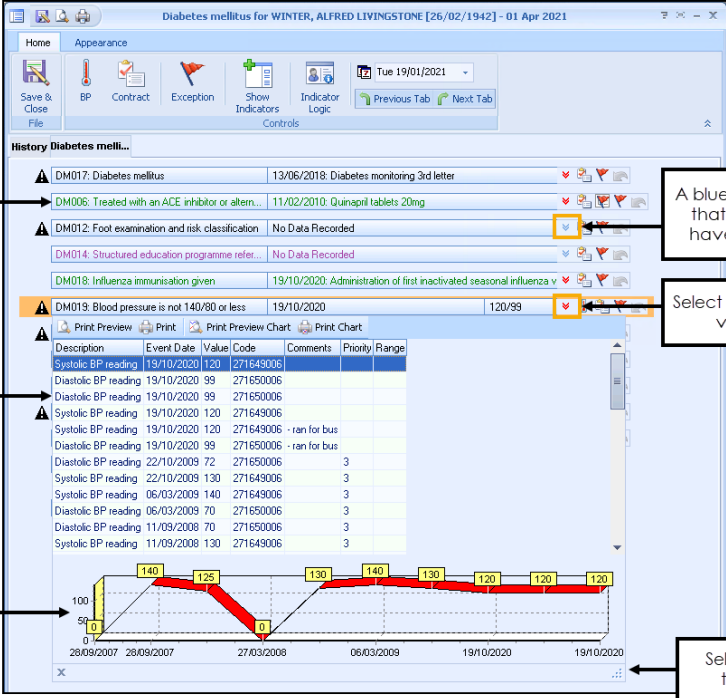
Toolbar Icon	Description
Save & Close	**Save & Close** - This saves the data to the patient's record and closes the template.
Rule Logic	**Rule Logic** - Displays the Rule Logic Tool.
BMI	**BMI** - Displays the BMI Calculator.
BP	**BP** - Displays the Blood pressure data entry screen, see Recording Blood Pressure Values.

Toolbar Icon	Description
electronic Frailty Index	**electronic Frailty Index** - Opens the Electronic Frailty Index (eFI) Calculator.
Smoking	**Smoking** - Displays the smoking data entry screen, see Recording Smoking Status.
Codeset	**Codeset** - Opens the **Codeset Codes** data entry screen where clinical terms can be chosen from a pre-defined list.
Contract	**Contract** - Opens the **Codeset Codes** data entry screen where clinical terms can be chosen from a pre-defined list.
Additional	**Additional** - Displays data entry terms for entering additional clinical terms.
Rule Logic Exception	**Rule Logic Exception** - Displays the Rule Logic Exception Tool.
Exception	**Exception** - Opens the **Exception Codes** data entry screen.
Previous Exception	**Previous Exception** - Displays expiring terms for the previous contract year.
Show Indicators	**Show Indicators** - This activates the Alert Indicator pop-up window. See **Vision+** Alert Screen for more details.
Undo Last Entry	**Undo Last Entry** - Undo the last entry recorded.
Undo All Entries	**Undo All Entries** - Undo all entries recorded.
Indicator Logic	**Indicator Logic** - You can use the Indicator Logic tool to view the rule set logic behind the pathway. See Indicator Logic Tool for more details.
Tue 15/12/2020	**Default Date** - The date defaults to today but can be changed by entering a new date or by choosing from the calendar. See Default Date for more details.
Previous Tab Next Tab	**Previous and Next Tab** - The previous and next tab toggle you through the tabs of the template.

Listing and Graphing Historical data

The latest record always displays on the Template however you can look at historical data and where appropriate graph the information. The red ⌄ icon at the end of the row indicates you can view more entries. A blue arrow ⌄ icon signifies that there is only one record:

The latest recorded entry displays on the template

A blue history arrow indicates that the patient does not have any previous history

Select the red history arrow to view historical data

Previous entries are listed

Numerical data also displays as a graph

Select to resize the table or graph

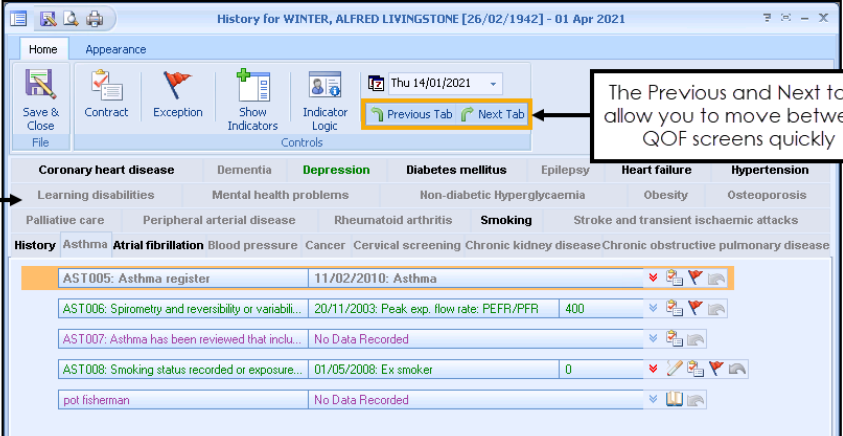💡 **Training Tip** – For more information on the History tab, see Viewing the History Tab.

Viewing All Templates

Using the **All Template** option you can view all QOF Templates.

To access all templates in **Consultation Manager**, select the **Vision+** menu from the floating toolbar or right click **Vision+** from the Windows notification area and select **QOF Templates** - **All Templates**.

You can now view all the QOF/QAIF Templates:

Templates display the following colour coding:

- Text in green indicates that a requirement has been met.

- Black text implies something needs to be recorded.

- Grey text indicates the patient does not qualify for this QOF/QAIF category, however, you can still access it and record data, for example newly diagnosed patients.

Summary - Viewing or Adding data to a Template

To add data to a Template, highlight a row and select one of the following **Data Entry** icons at the end of the line:

Icon	Function	Icon	Function
	Previous Entry - This blue icon indicates that the patient does not have any previous records.		**Smoking** - Selecting this icon launches the smoking data entry screen and allows you to record the patient's smoking status.
	Previous Entries - When the row contains more than one relevant clinical term, a drop-down arrow displays in red to alert you that more clinical terms are available than the one currently being displayed. Where numeric data is recorded a graph is also visible.		**Blood Pressure** - Selecting this icon displays the blood pressure data entry screen and allows you to record a patient's blood pressure details.
	Contract Read Code - The Contract icon takes you to the **Codeset Codes** data entry screen where clinical terms can be chosen from a predefined list of relevant contract clinical terms.		**BMI** - Choosing this icon displays the BMI data entry screen and allows you to record a patient's BMI status.
	Exception - Choosing this icon allows you to enter an exception code from the clinical term list.		**CHADS** - This icon provides quick access to the **CHADS2 - AF Stroke Risk Calculator**.
	Diabetes Risk - This icon provides quick access to the **Diabetes Risk Calculator**.		**CHA2DS2-VASc** - Use this icon to access the **CHADS2-VASc - AF Stroke Risk Calculator**.
	Rule Logic Exception - Choosing this icon displays the rule logic exception screen for the highlighted indicator.		**Depression Questionnaire** - This icon provides quick access to the **Depression Questionnaire**.
	Rule Logic - This displays the logic screen for the highlighted indicator.		**Undo** - The Undo Last Entry icon deletes the clinical term previously entered during the current session. If multiple clinical terms are recorded, the most recently added one is deleted first. If no clinical terms are available to be deleted this icon is greyed out.
	GPPAQ - This icon provides access to the **General Practice Physical Activity Questionnaire (GPPAQ)**.		**Undo All Entries** - The Undo All option allows you to remove all entries added to a Template.
	Scot-PASQ - This icon provides access to the **Scottish Physical Activity Screening Questionnaire (Scot-PASQ)**.		**Add Default Clinical Term** - Selecting this option automatically records the default clinical term.