

## Template Designer FAQs

See below for some **Template Designer** frequently asked questions:


### Can you add mandatory fields to a template?

Yes, from **Template Designer** highlight the row in the template. From the **Layout** tab select **Required Field**.

### Can I delete templates that I have downloaded but no longer use?

Yes, from the **Windows Notification Area**, right click **Vision+**  and select **Download Web Files**. Highlight the template, select **Delete** followed by **Delete** on the toolbar.

### Can I delete a template that I have created in the practice?

Yes, from the **Windows Notification Area**, right click **Vision+**  and select **Download Web Files**. From the toolbar select **Admin**, then select **Templates**. Highlight the template to be removed and select **Delete**.

### Is there a quick way to move rows up and down within a template?

Yes, from **Template Designer** home page right click on the row in the template and choose either **Up** or **Down**.

### Can I view a patient's priority 1 codes in a template?

Yes, when creating the template, by default the first tab is a **History** tab which displays the patient's codes (equivalent to the journal). Scroll to the **Priority Column** and select the filter on the toolbar. Select **Priority 1**.

### Can you add a recall to a template?

Yes, from the **Template Designer** home page select **Add Recall Row** from the **Controls** area of the toolbar.

## Can you add a Word document to a template?

Yes, from the **Template Designer** home page, select **Add Attachment Row** from the **Controls** area of the toolbar.

## How can you display Chronic Disease Registers in a template?

You can add existing QOF terms to your template. To do this, from the **Template Designer** home page, select **Add Contract Row** from the **Controls** area of the toolbar.

## Can you insert a link to a website in a template?

Yes, from the **Template Designer** home page, select **Add URL Row** from the **Controls** area of the toolbar.

## What is the difference between a Code Group Row and a Code Check Group Row in the Controls area on the toolbar?

Both are check boxes that enable you to quickly record clinical terms. However, with a **Code Group Row** you can only select one SNOMED CT/Read term when adding data, whereas the **Check Group Row** enables the selection of multiple terms.

## What does the Show Comments box do when you add it to a Code or Check Group Row?

The **Show Comments** box displays in the template enabling you to record free text information.

## Are you able to share a template with another user to test the template prior to publishing to all staff?

No, the template is only available to use on the computer where the status is set to **Test**.

## Can you edit the name of a template?

Yes, from **Template Designer** home page select **File** and then **Rename** or save a copy of the template and give it a different name by selecting **File** and then **Save As**.



**Note** – You cannot edit or rename some HB/CCG managed or national templates.

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## How do you add multiple pages to your template?

From the **Template Designer** home page, select **Pages** and then **Add**. Type a description for the page and choose a colour or font if required.



**Note** - In template design the page displays at the bottom of the screen, but when using the template, it is at the top of the screen.

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## Can you import templates from other practices?

Yes, from **Outcomes Manager**, select **Use Template**.

## When you are viewing available templates in **Outcomes Manager** will the list not become too long?

You can apply a filter, from **Outcomes Manager** select **Search**. From here you can filter templates by organisation, version and template group.