CS. clinical support

# Quick Start Guide to Dynamic Templates

CS Version 2.7.12 (VISION)

## Getting Started

**CHECKLIST:** You must **be logged into your Clinical System (VISION) with a patient selected** to access Clinical Support (CS)


- Double click the 'Clinical Support ' icon on your desktop
- Enter your Vision user name and Password
- Select 'Start' from the first screen
- Select 'OK' from the second screen


**TIP:** You need only open CS once at the beginning of your day/session, if you keep it minimized on your desktop then CS will be available for you to use immediately.

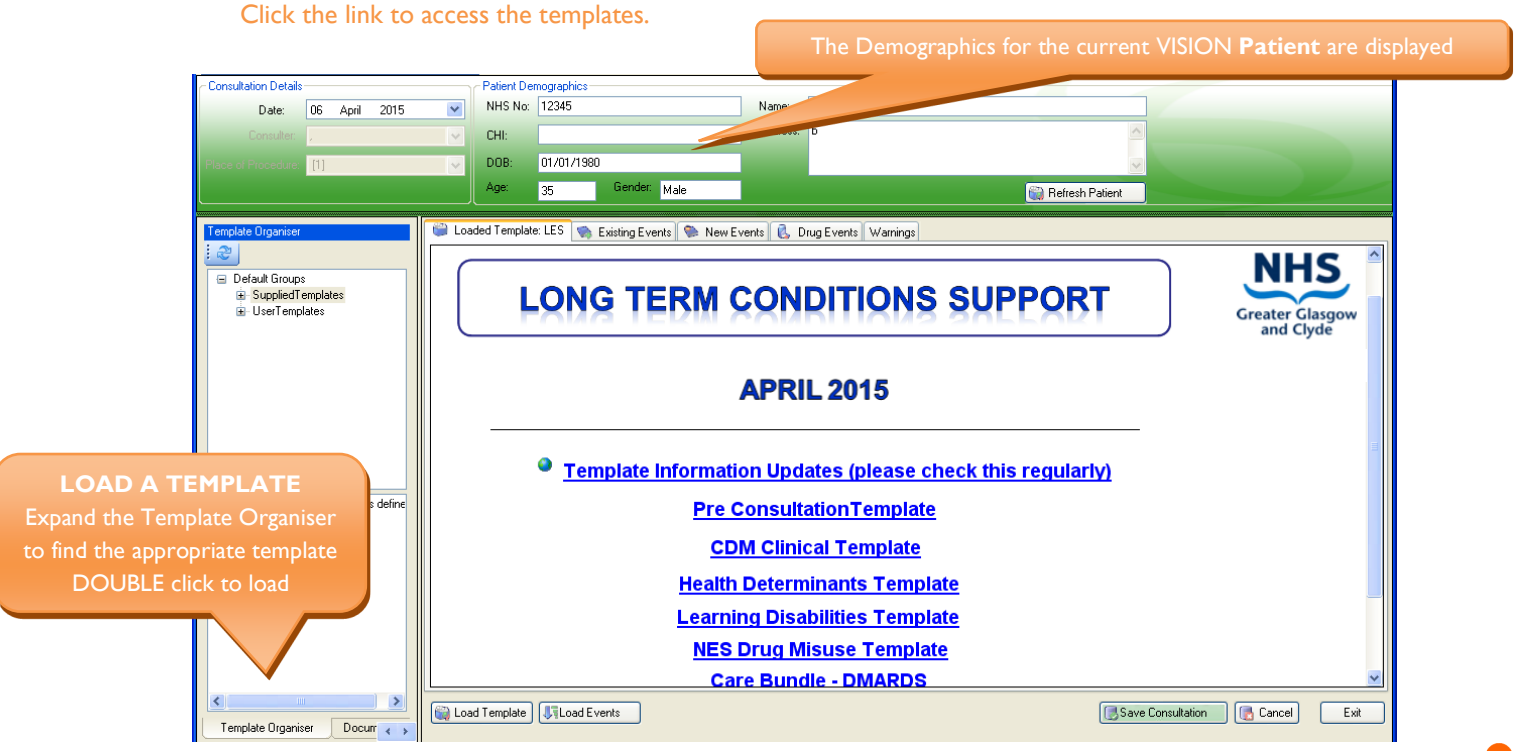
## CS Templates

Once CS has loaded you will have a new window available. This is a standard Windows screen and you can Minimize, Full Screen or Exit using the icons in the top right corner. The 'Document Map' tab is the default. To maximise the main screen, drag the splitter bar left and the top bar up.

Your HOME screen will be a menu of templates from which you can choose;-

- the individual (non-dynamic) 'Pre Consultation' template
- the Dynamic Template 'CDM Clinical'
- the Dynamic 'Health Determinants' template
- the individual (non-dynamic) 'Learning Disabilities' template
- the individual (dynamic) 'NES Drug Misuse' template
- the individual (non-dynamic) 'Care Bundle DMARDS' template

Click the link to access the templates.



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**Consultation Date:**

If required you can set the date of the entries within CS (to a previous date) in the CS screen so that when data is filed in VISION it appears with the desired date.

**NOTE:** Individual data items can be filed with any date regardless of the consultation date.

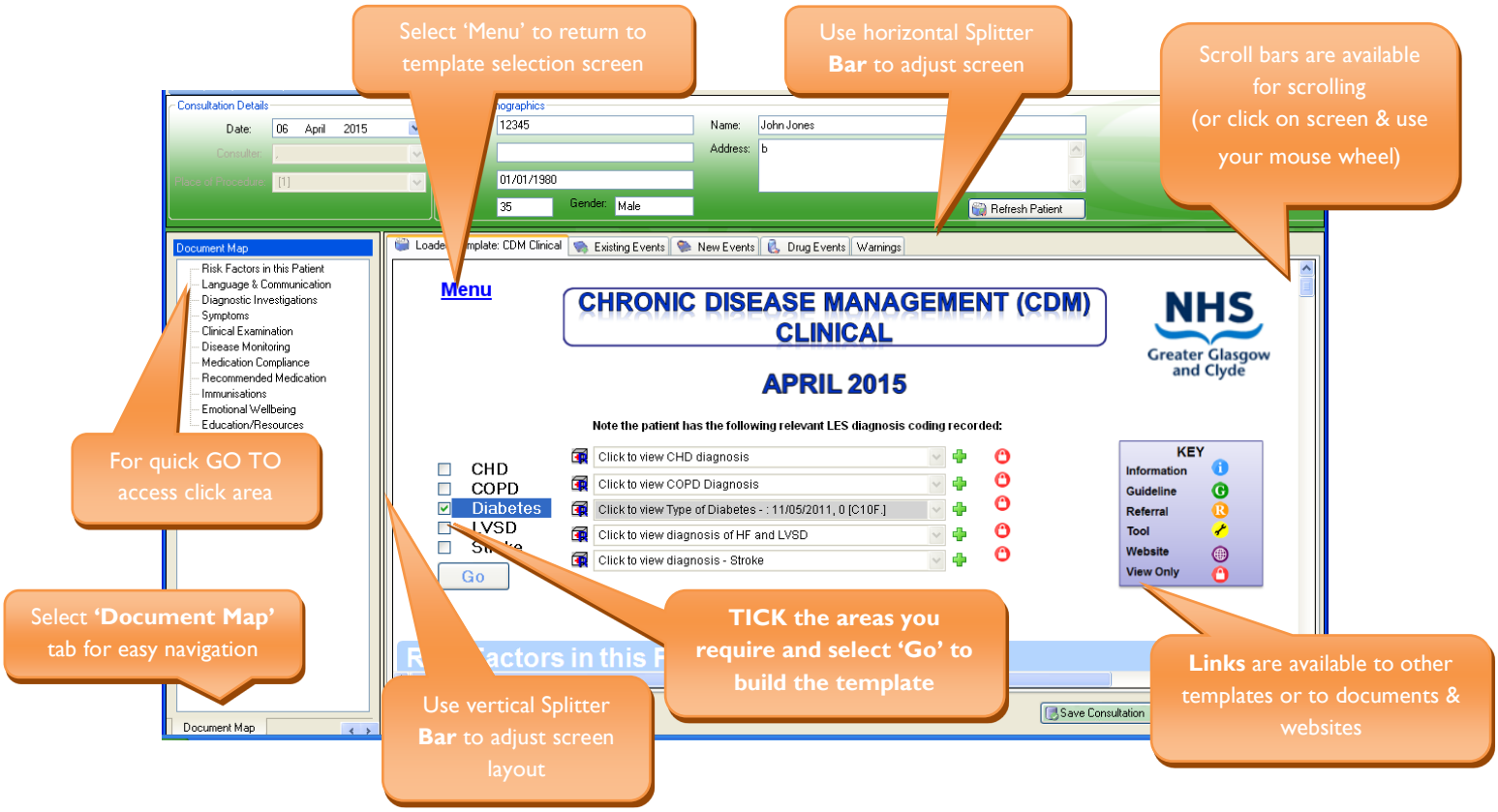
**NOTE:** Consulter and Place of Procedure cannot be edited in CS.


**Once a template is loaded;-**

For Dynamic Templates a tick box or oval diagram is presented for you to choose the appropriate options;

**TICK BOX DYNAMIC SELECTION:**

For the CDM Clinical Template select the LES area(s) you wish to cover by ticking the appropriate box(es), then select 'Go' and the template will build beneath. At any time you can reselect your options.




TIPS:

- Maximise the size of the template part of the screen by moving the top and splitter bar.
- If you want to access a specific section of the template, use the Document Map.
- To skip navigating back through the Menu, select the Template Organiser tab and select the template you wish.

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*Data entry items on screen;-*

The most recent data is displayed for each item on screen

**Historical data** can be viewed in chronological order in an on screen drop down by selecting the drop down arrow

Current non-smoker - Smoking habits:No: 07/11/2011, 0 [137L.]

TWO WAYS TO ENTER DATA;-
i) **DOUBLE** click the icon on the left hand side

ii) **SINGLE** click the green '+' on the right hand side

**NOTE: MEDICATION fields are view only; the 'file' icon on the left is 'greyed' out and there's no green plus. Medication can be viewed by clicking on the drop down arrow.**

ACE INHIBITORS or ARB DRUGS

ACE Inhibitors - No events recorded!

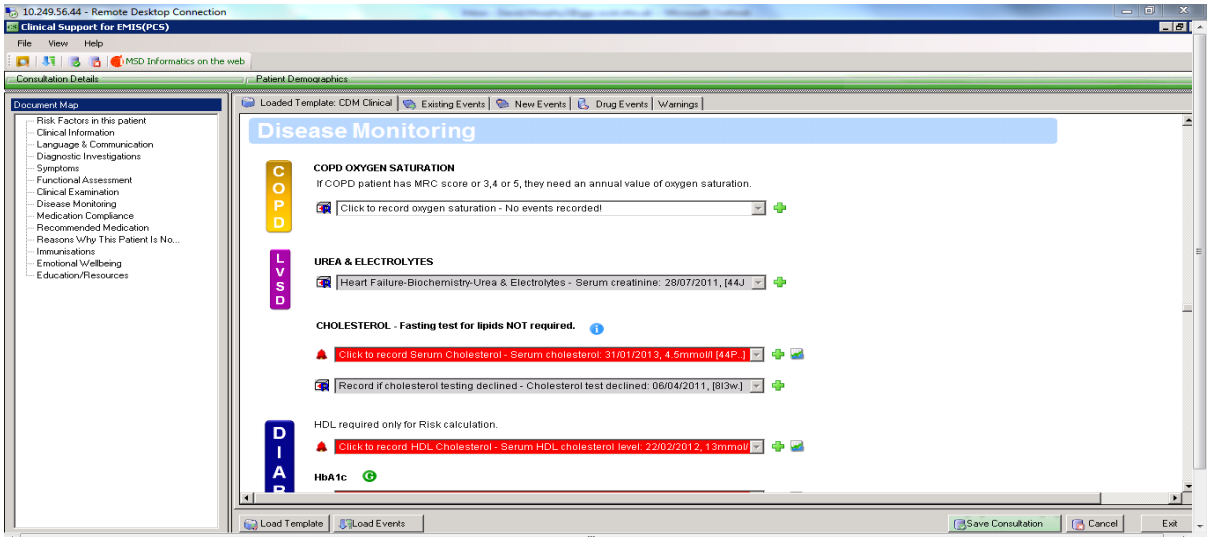
Angiotensin II Receptor Antagonists - No events recorded!


Many new 'icons' have been added to templates. Key shown on CDM Clinical provides the description. 'Hover' function, when mouse is placed on the icon to show what is behind it if clicked.

## Banners & Headings

Banners and headings have been used to show clearly different sections and which areas within are specific to certain CDM's. Headings are shown in white on light blue background. Banners down the side. Same colour scheme is used throughout. CHD - Red; COPD – amber/gold; Diabetes – blue; LVSD - Purple; Stroke – Green.

Areas that have no banner are applicable to more than one CDM.



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## Oval Diagram Dynamic Selection

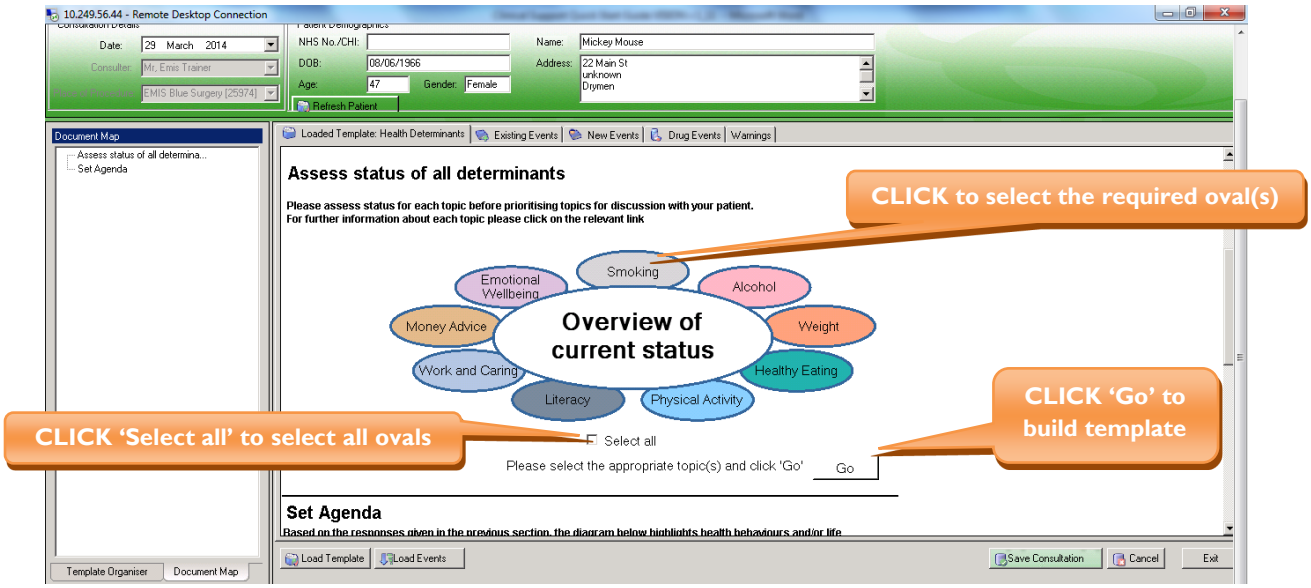
For the Health Determinants Template select all topics for the Assess Status. Either by…

1. Selection of the 'Select All' button and all ovals colour will change to yellow,
   OR
2. Selecting each oval and as 'clicked' the colour will change to yellow.

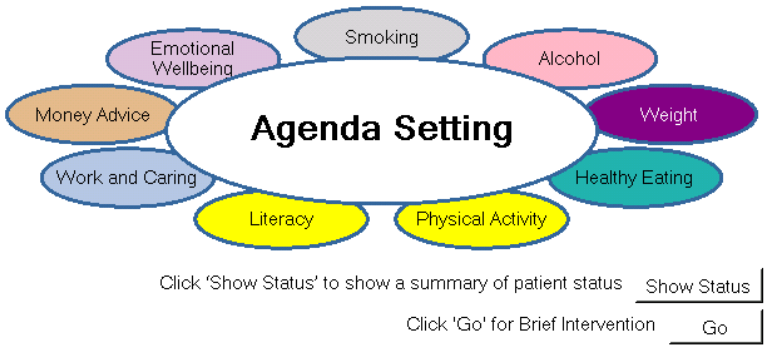
Then Select '**Go**'

The template will build beneath showing the Assess Status questions.

Thereafter for the Set Agenda (Assess Readiness to Change...) and the Set Goals, select the topic(s) you wish to cover by clicking the appropriate oval(s). The oval(s) selected will change to a yellow colour and then select 'Go' and the template will build beneath.




**NEW** In the 'Set Agenda' section of the HD template a new feature is available within the oval diagram.




Within the 'Agenda Setting' section, the lobes can change colour to reflect the patient status for each of the areas.

This new functionality allows those areas that have been highlighted within the assess status section to turn purple, for example if patient is a smoker then the 'Smoking' lobe will turn purple.

To activate this feature, click the 'Show Status' button and the areas which are pertinent to your patient will change to purple.

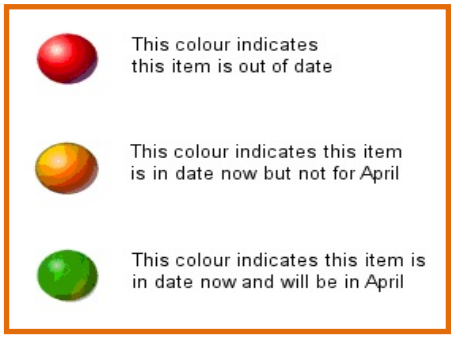
To select the topic area, click the lobe which then turns yellow, then click 'Go' to display the Brief Intervention.

This functionality has been developed to enable the practitioner to support their patient's decision making and open opportunities for further discussion around their priorities.

## Traffic Light System

Where data has a valid time period the status of the item is shown using a traffic light system
Grey indicates data is present but no time constraints.

**Note:** Data fields with no data present show as white, independent of time constraints.




## Graph

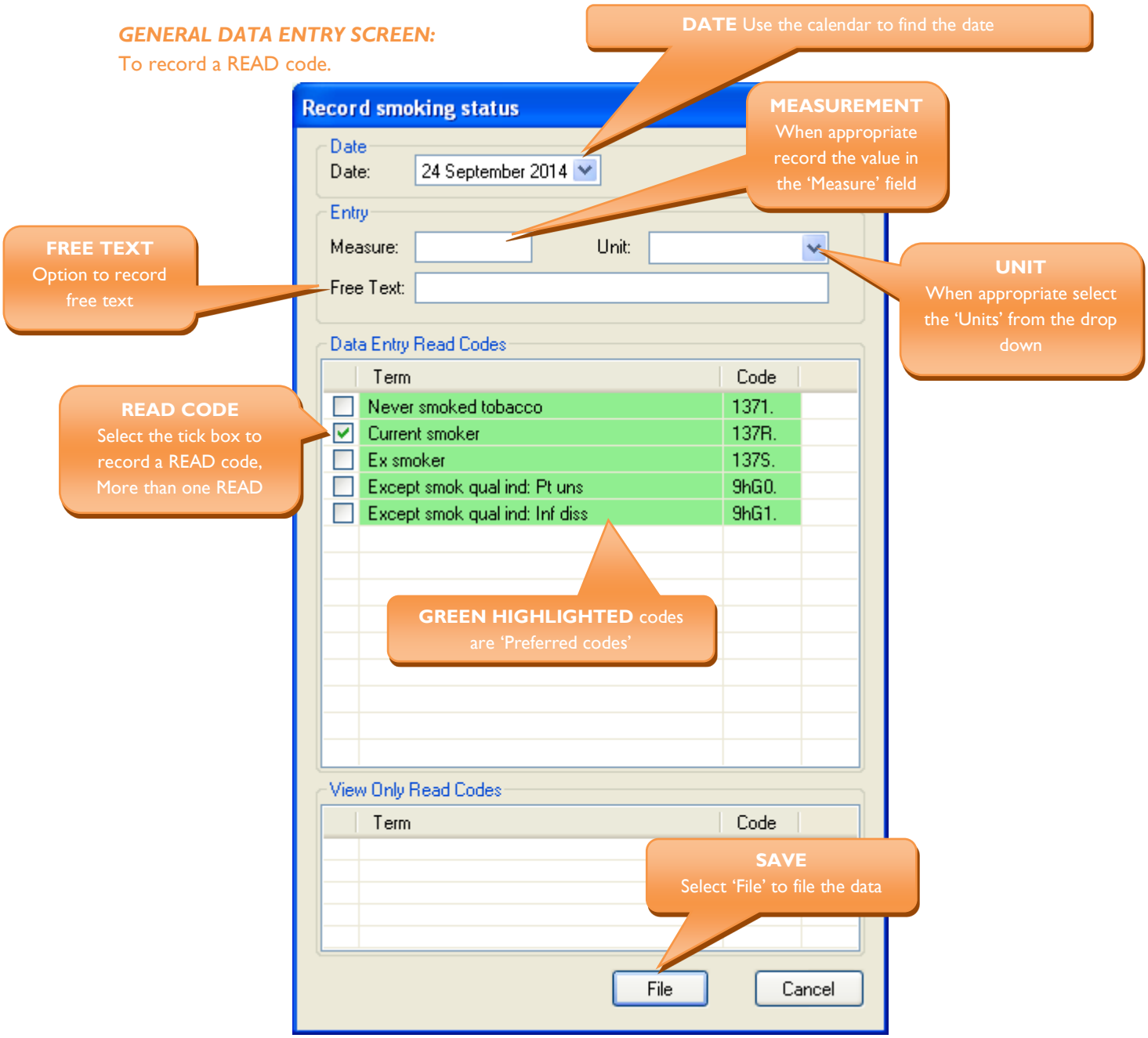
For some data a graph icon is available, click the Graph icon to view the data for that field in a graph format.
Click icon again to hide the graph.

## Entering Data

Once you have selected a field from the template you are presented with one of two possible types of data entry screens;-

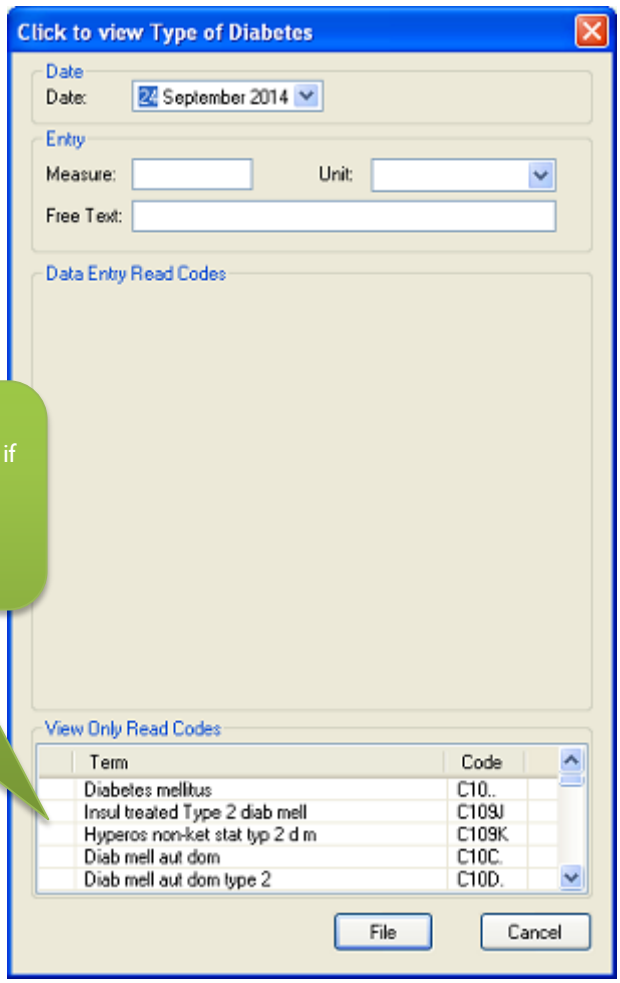
***GENERAL DATA ENTRY SCREEN:***

To record a READ code.



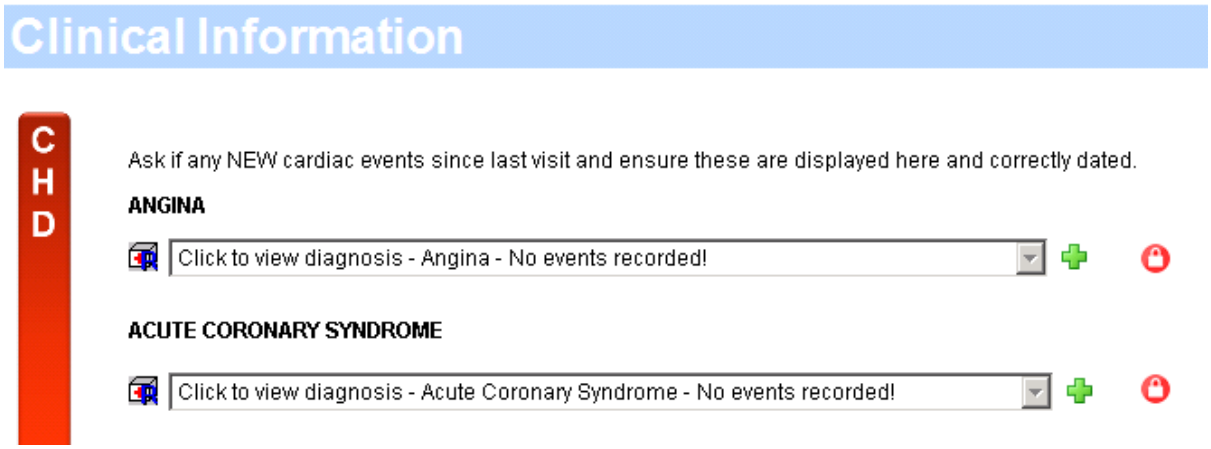

**Note**: You can only select ONE READ code at a time from the list of available codes **if** you have a value entered in the 'Measure' field.

**TIP:** In the calendar – click on the MONTH or YEAR to scroll quickly between years.



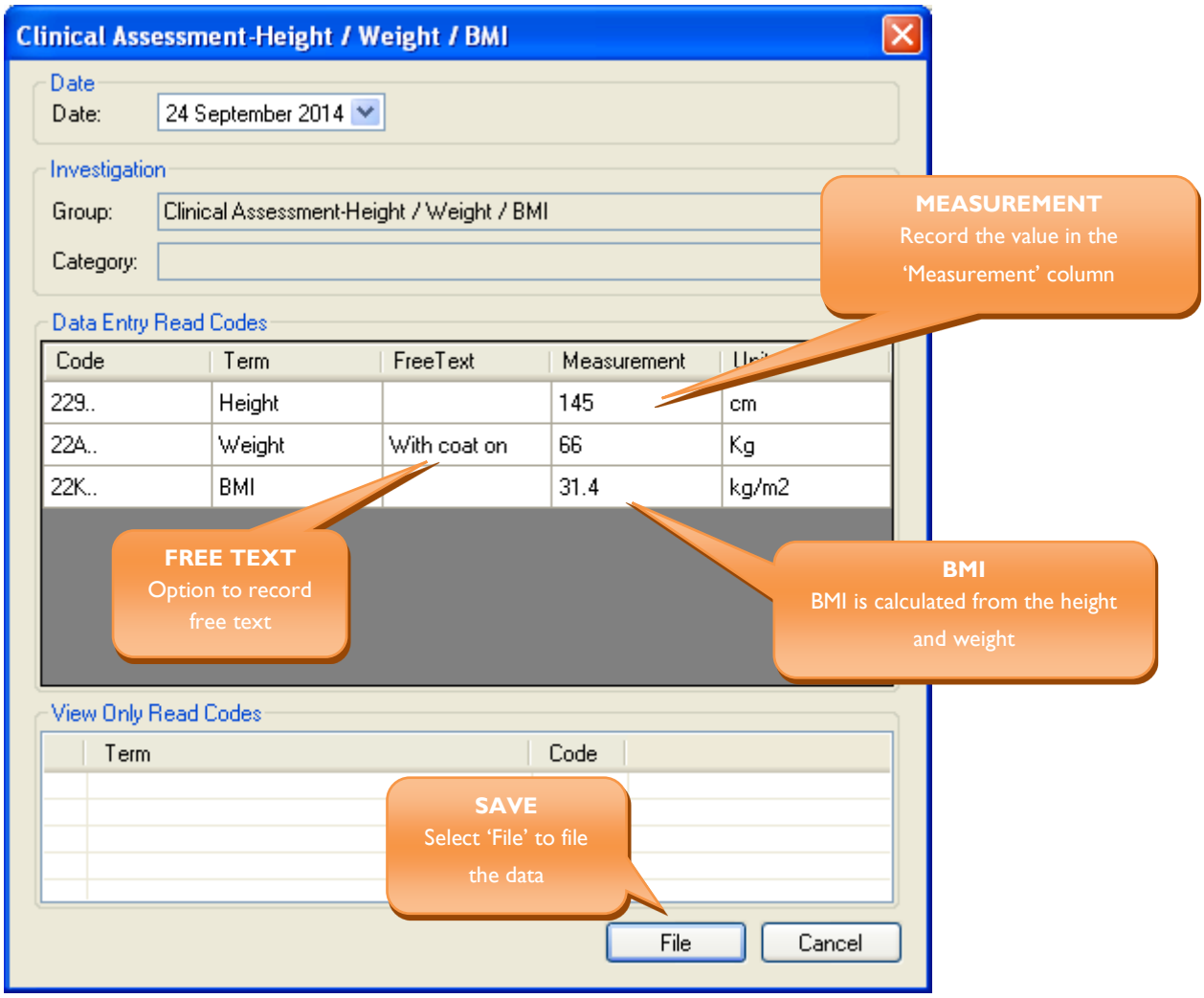

Some items in a template have 'View Only READ codes', these are READ codes that will display in CS if in the patient's notes but you cannot enter these READ codes through the template. They are displayed for information in the Data entry screen.

**Note:** From the template those data fields where the Read Codes are 'View only', the appropriate *padlock* icon is shown alongside to the right hand side. For example…



***QUANTITATIVE DATA ENTRY SCREEN:***

Used where values are recorded against predetermined READ codes, such as for Height and Weight.




**TIP:** Move through the measurement column using the DOWN ARROW key.

**NOTE:** For BMI the patient's height will be pre-populated if present in the clinical system.

## *Alternative Views*

All events for the currently selected patient can be viewed as a list through CS by selecting the 'Existing Events' tab. This shows a table listing all the events for the patient on individual rows.

**Note:** Drug events are not shown on this screen but are available through the 'Drug Events' tab.

**Data entered through CS is not immediately viewable in VISION until the consultation has been saved and closed. To view data recorded through CS during the session select the 'New Events' tab** and you can view events that have been filed during the current CS session.

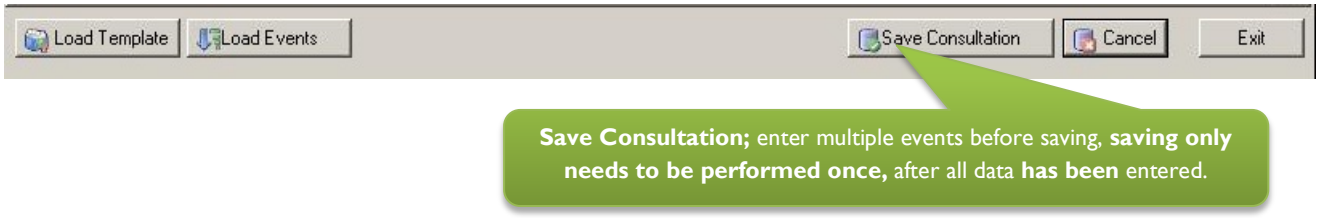
**Note:** Data items cannot be deleted or amended from this screen.

The 'Warnings' tab displays data that may require further investigation from a data quality perspective, for example values outside of valid ranges. **This tab has not been configured by NHS GG&C for use currently.**

## Saving Events

Data entered through CS templates can be saved into VISION periodically during the CS session or at the end of the session. To save the events to VISION select the 'Save Consultation' button in the lower part of the CS screen. Keep CS minimized on your desktop for quick access.

**Note:** Users can enter multiple events before saving, **saving only needs to be performed once per consultation.**




**TIP:** You can move between different CS templates and between CS and VISION without the need to Save. 'Save Consultation' only needs to be performed once at the end.

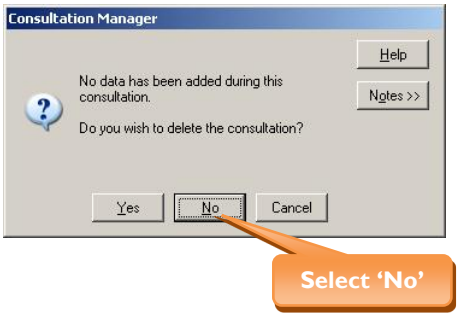
## Exiting Clinical Support

To exit CS

- Select 'X' from the top right corner of the window

Or

- select 'Exit' button in the lower part of the CS screen

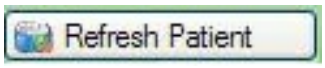


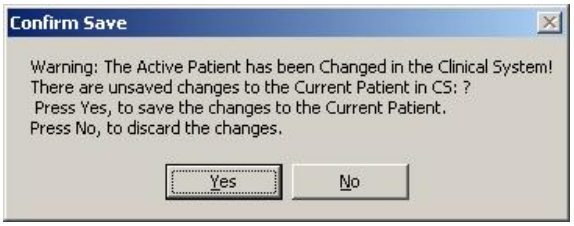

Selecting 'Cancel' will exit CS without saving entered data. You will be prompted to save changes.

**NOTE:** VISION will prompt you with a screen *'No data has been added during this consultation. Do you wish to delete the consultation?'* (This refers to data entered through VISION and not CS). Select **'No'** if you have entered data through CS.

## Changing the Patient in CS

When you start up CS, CS uses the patient currently selected in VISION as the patient to be displayed in CS.




If the patient in VISION is changed during the CS session the patient in CS remains as the original patient until you select the **Refresh Patient** button in the demographics part of the screen.

**NOTE:** Data will be saved to the correct patient, CS will alert you if you have changed the VISION patient and not refreshed the CS patient.


***If you try to enter data when you have not refreshed the patient a warning box will alert you.***

## *Editing & Deleting Events*

Events entered or displayed in CS cannot be edited or deleted in CS. Events recorded through CS and committed to VISION can be edited or deleted from your Clinical System in the usual way.