VISION

# A Quick Guide to Adding Data in Consultation Manager

This guide provides an overview of how to add data in Consultation Manager. It is meant as a training aid and as such is not exhaustive. Please refer to the on-screen help for full reference to the associated topics below:

- **Read Term Add**
- **Add Menu**
- **Alert Indicator Screen**
- **Vision+ QOF Templates**
- **Guidelines**

Using Read Term Add

You can use the Read Term Add box to search for relevant Read codes and add Read coded data to the patient record. Vision decides the most appropriate data entry form relevant to the chosen Read term category.

1. With a patient selected and an open consultation, select the **Journal tab.**

2. Type a Keyword in the Read Term Add box at the base of the screen - press the **Enter** key. If the Read Term box is not visible, start typing and it automatically appears.

> Read Term for Characteristic:
> abdo pai
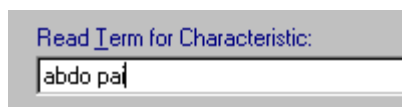
Figure 1: Read Term Add

3. Once you have pressed Enter, a Read Term is displayed to match your entry, eg 196..11 Abdominal pain type, or H33.. Asthma. The cursor stays in the Read Term for Characteristic window.

> Read Term for Characteristic:
> 196..11   Abdominal pain type

Figure 2: Read Term displayed

4. To select the Term click **OK** or if you want to look for an alternative term, either use your up and down arrow keys or double click on the Read Term to view the Read dictionary where you can choose from the Read dictionary list.

5. Once you have selected the correct Read Term and clicked **OK**, Vision displays the relevant data entry form where you can add further details as necessary and click **OK** to save your entry.
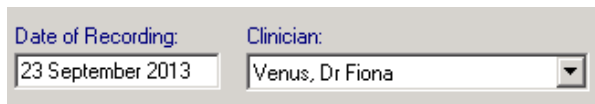
> 📒 **Note** - If you know the Read code for an entry you can type #
> followed by the code eg #H33 in the Read Term Add for characteristic
> box.

Using the Add Menu

The add menu provides quick access to the more basic data entry add forms eg BP,
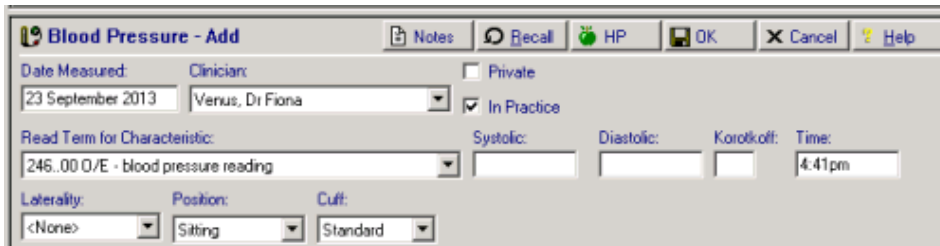Height, Weight, Smoking, Alcohol etc.

1. With a patient selected and an open consultation, Click on the **Add** menu, or
    press **Alt**-**A** for the Add menu, then press the underlined letter - eg **Alt**-**A**-**B** for
    Blood Pressure - Add.

2. The general entries found on most Add screens are the date of the record and
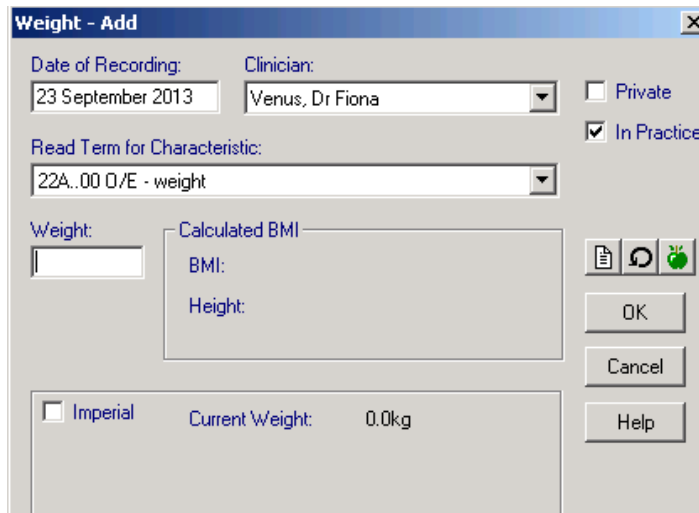   the GP or clinician making the entry.

Date of Recording and Clinician

3. Some Add screens also have extra buttons to record Health Promotion
    , Recall and Free Text Notes .

4. Once all the necessary entries have been made, click on **OK.** If you click
    Cancel, the entries will not be retained.

An Example of the BP Data Entry Screen

Example of the Weight Data Entry Screen

Using the Alert Indicator Screen

The Alert indicator window is part of Vision+ and appears as soon as you select a patient. To add data via this screen double click on the indicator line you want to add data to. Depending on the type of data you are entering, one of two screens will appear:
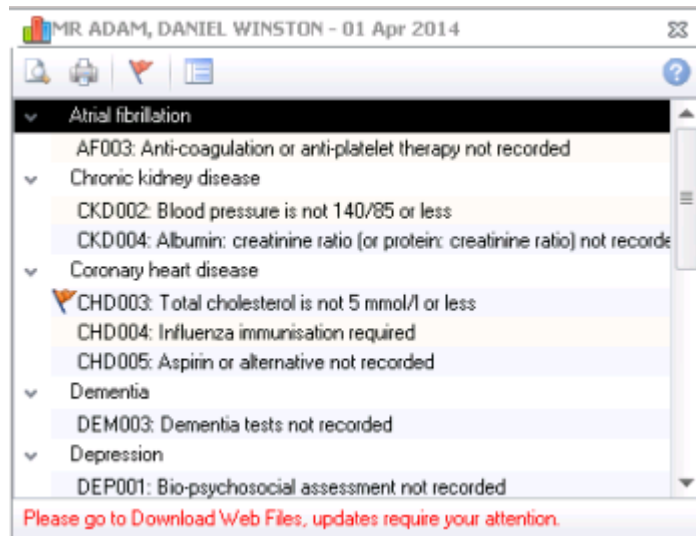
Alert Indicator Screen

- **Measurements** - A Measurement screen is displayed for Smoking, Blood Pressure and BMI. Complete the relevant boxes and click **OK** to save the data.

Smoking Screen

- **Contract Codes -** Alternatively, the Contract Code screen is displayed which shows a list of Read codes. Choose the Read code(s) required by selecting the Apply box and complete any of the other boxes, where appropriate. Click **OK** to save the changes.


Contract Codes

Using QOF Templates

The Vision+ element of Consultation Manager provides quick access to QOF Templates. The section below explains how to view the templates and add data:

1. Highlighting any line on the alert indicator screen and choosing the Template icon or right clicking and choosing **Template**. This option takes you directly to the clinical or organisational domain selected.
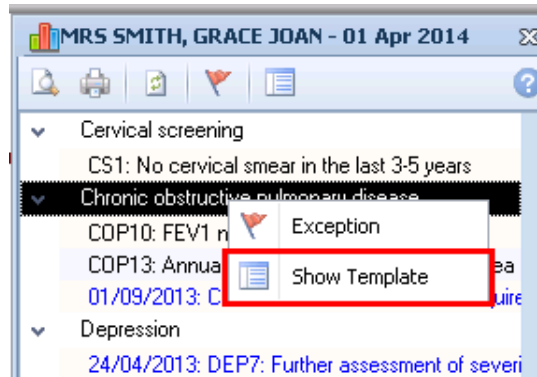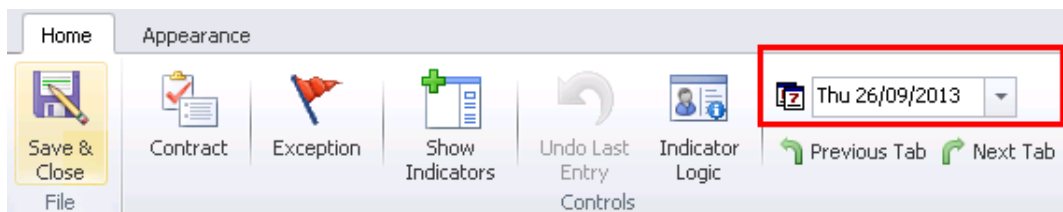

Alert Screen - Contract Template

2. Alternatively, you can choose **QOF Templates** from the Toolbar or the Vision+ menu. This gives you the option to view all Templates or select a specific one.
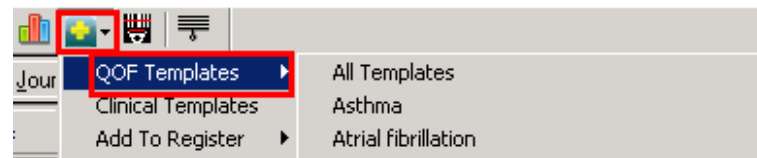
QOF Contract Template

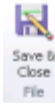3. The toolbar at the top of the template screen allows you to change the date.

Template Toolbar

4. To add data use either the Toolbar of the icons at the end of the indicator line.

> **Note** - The icons and data entry screens vary depending on the type of date you are adding.


Contract Templates - Data Entry

5. Once you have recorded the data click **Save & Close File** on the Toolbar

Using Guidelines

Guidelines are helpful if adding multiple data for one patient and are designed to be used in clinics or if entering QOF data. As Guidelines are completely customisable and can be viewed in a variety of ways from the patient record, the instructions below are based on accessing guidelines from the local guideline index icon.

1. Select the Local Guideline icon .

2. Double click on the Guideline you want to use.
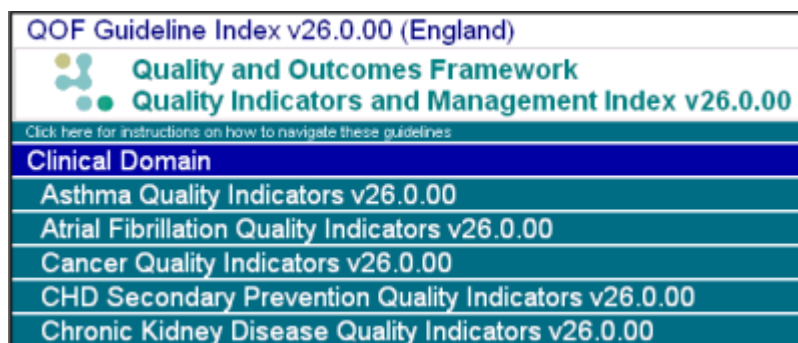
Guidelines

3. Information that has already been recorded for the patient is shown on the screen.
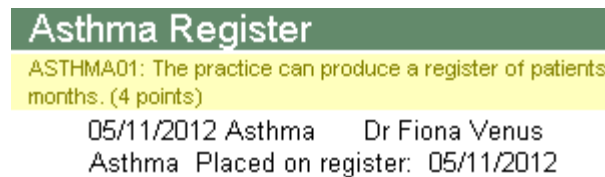
Patient Data Filter

4. Click on a button or hotspot to add data. Record the information and click **OK.**

Figure 3: Clinical Data Hotspots - Add Data

5. Alternatively, if there is a grid, you can add by clicking on the + column.

Patient Data Grid

6. Add the information and click **OK**. If using a grid you can also use the next row facility on the grid. If you do not want to make an entry here, but decide to move on to another entry, click on the scroll bar at the bottom of the screen and choose **Skip to.**