Guidelines

This quick reference guide explains how to amend a Guideline in Vision 3. For more information on Guideline design - see Guideline help.

Finding the name of your Guideline

To amend a guideline, you must know its Mnemonic (short name). If you do not know what it is called, follow the steps below:
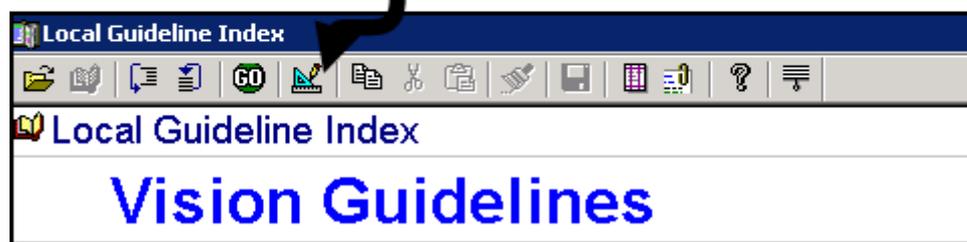
1. From the **Toolbar**, select **Local Guideline Index** [icon].

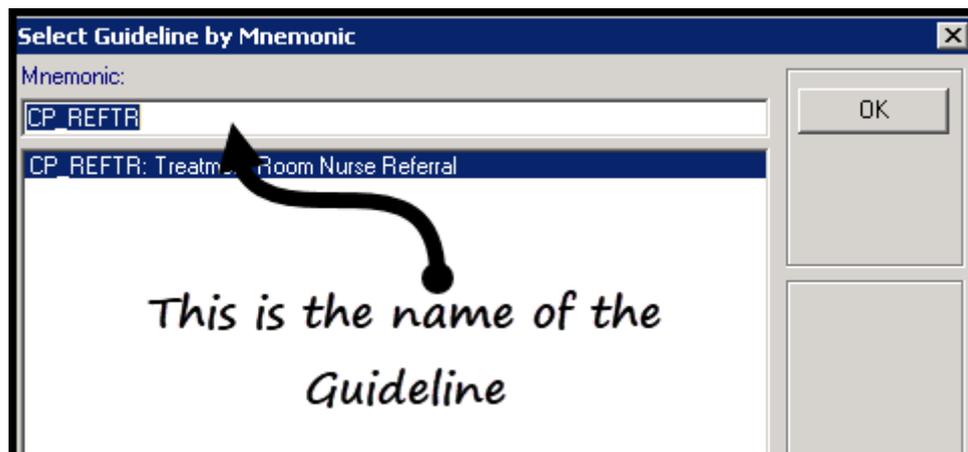Select Local Guideline Index
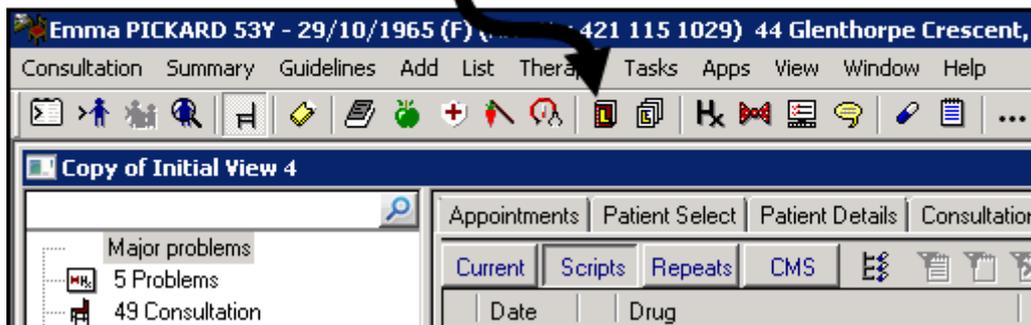
2. From the **Local Guideline Index** screen, select **Maintain** [icon]**,** to switch into design mode.

From the Local Guideline Index Select Maintain

3. Right click on the Guideline you want to amend, select **Edit** and make a note of the name.

Right click on the
Guideline and
select Edit

Locum- Basic [	Edit
Practice Nurse	Font
Reception Data	Background Colour
	Properties

Select Guideline by Mnemonic

Mnemonic:

CP_REFTR

CP_REFTR: Treatm... Room Nurse Referral

OK

This is the name of the
Guideline

4. Now. Select **Cancel** to close the Guideline.

5. Select **Maintain** to come out of design mode.

Amending your Guideline

1. From Consultation Manager, select a test patient.

2. From the Toolbar choose **Guidelines** - **Select Guideline**:

Choose Guidelines - Select Guideline

3. Type the name of your guideline in the **Mnemonic** box and select **View**

4. The guideline displays as if you were going to review, or add data. To update the guideline you must be in design mode, select **Maintain**.

5. The guideline displays in design mode with the floating toolbar:

Design mode

6. For the purpose of this quick reference guide, we are only going to cover how to amend a patient data line and change the properties. For more information on the other options available click *here*.

7. To change patient data, for example, to display the last 3 Blood pressure records (instead of the last 1 Blood pressure). Right click on the appropriate row and select **Edit**.

8. The patient data screen displays:
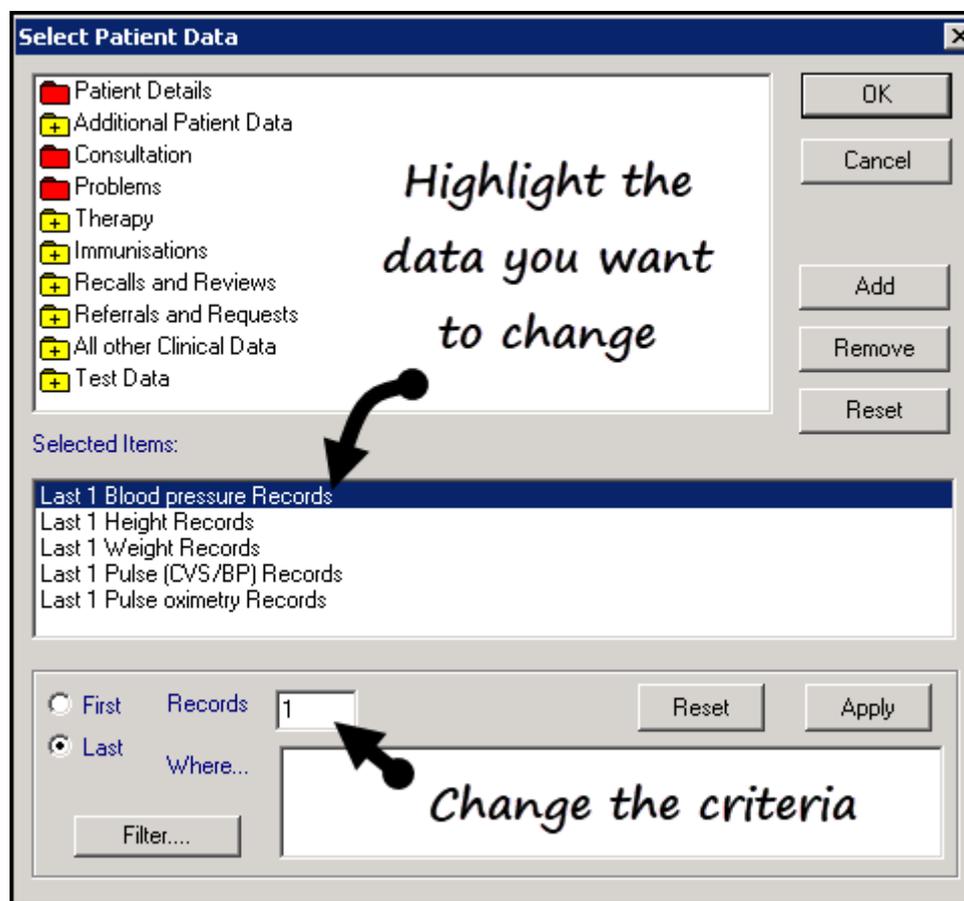
9. To display the last 3 Blood pressure records, replace last **1** Records with **3** and select **Apply**.

Note - To further restrict the display of data in the guideline select **Filter** and choose your criteria. For example you may want to include a date range.

10. Select **OK** to save the changes.

11. To check that the data displays correctly, select **Maintain** to come out of design mode (which also saves the changes) and enables you view the data in the guideline.

Properties

Sometimes you want to change how data displays in your Guideline. For example, you may want data to display directly under a heading without having to click on it to expand it. To do this:

1. Make sure you are in design mode in your guideline by selecting **Maintain** .

**2.** Right click on the row and choose **Properties**:
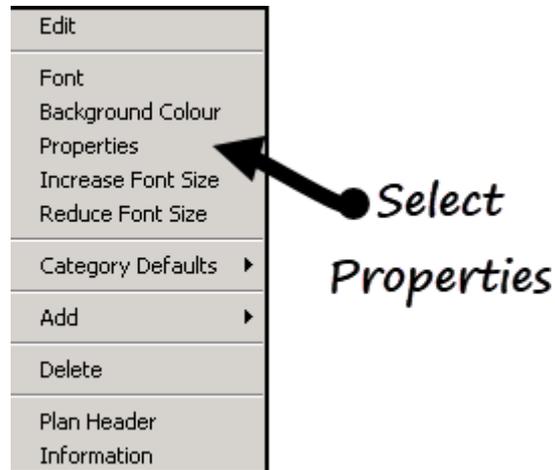
3. You can either select **Initially Expanded** so that items expand and display or change the **Level** (it depends on where and what row you are selecting in your guideline).
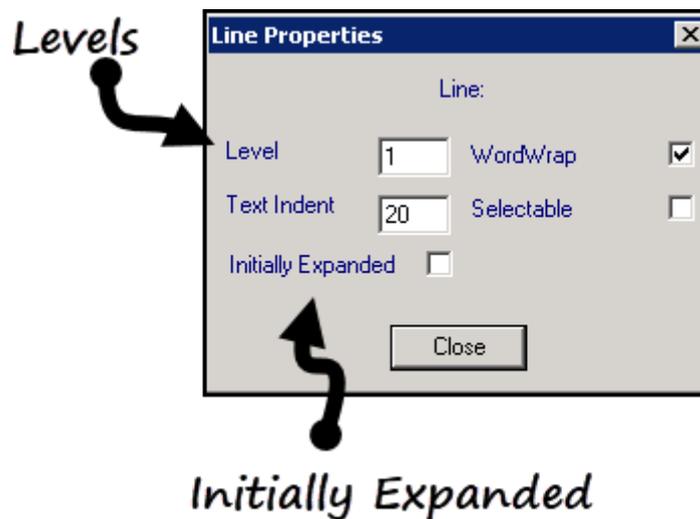
Setting a row to **Level 1** usually displays the data on the guideline (without having to select a heading to view it).

When viewing the guideline the data
below the heading: Examination
displays immediately

Examination
20/09/2009 BP 132 / 80 recall due: O/E - blood pressure reading Dr Sarah Jupiter
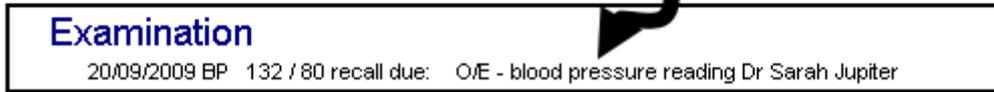
4. After making the line property changes, select **Close**.

5. Select **Maintain** to save the changes and exit design mode.

Useful Links

Some other useful links include:

- ***Exporting guidelines***
  http://help.visionhealth.co.uk/DLM660/Consultation_Manager/index.htm#2 4933

- ***Importing guidelines***
  http://help.visionhealth.co.uk/DLM660/Consultation_Manager/index.htm#2 4882