
Outcomes Manager Release Guide

Outcomes Manager enables you to upload practice-defined **Vision+** templates to the cloud so that other Vision organisations can download them. **Vision+** templates can be distributed across your GP network, CCG or Health Board.

From the end of January, Outcomes Manager includes some user enhancements. Please read the following sections to ensure you are up to date with the changes.

For more information on designing your own practice defined templates, click [here](#).

To access the full Outcomes Manager help select [here](#).

Outcomes Manager Overview

Outcomes Manager is a web-based interface that centralises access to a suite of templates and enables you to manage the distribution of your **Vision+** templates. You can upload your Vision+ templates and oversee their circulation through the new **Service Management** area within Outcomes Manager. Other Vision organisations can then view **Available Templates** and mark any they want to download into Vision.

This guide explains how to manage template sharing and covers:


- How to obtain an Outcomes Manager account – [Obtaining a login account for Outcomes Manager](#)
- How to login to Outcomes Manager - [Logging into Outcomes Manager](#)
- How to view and filter templates - [Viewing and Filtering Templates](#)
- How to message the author/creator of a template - [Messaging a Template Creator/Author](#)
- How to download a template – [Viewing and Filtering Templates](#)
- How to delete a template that has been downloaded - [Deleting Downloaded Templates](#)
- How to upload a template – [Uploading Templates](#)
- How manage uploaded templates - [Managing Uploaded Templates in Outcomes Manager](#)
- How to remove a template - [Removing a template](#)
- Outcomes Manager administration - [Administration](#)

Obtaining a login account for Outcomes Manager

To distribute Vision+ templates to the Outcomes Manager cloud or to download another practice/organisation's template, one person in your practice must first register for an Outcomes Manager admin account.

1. To obtain an account click [here](#).

Share Vision+ templates with other GP practices



Share Vision+ templates: register today.

Tell us you're interested and we'll prepare your login details.

Soon you will be able to exchange Vision+ templates with other practices. This will let you:

- ✓ Make Vision+ templates you have created available to other practices
- ✓ Download Vision+ templates from other practices
- ✓ Use the same templates across your GP network, CCG or health board

Registration form fields:

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Email*	Phone Number*
<input type="text"/>	<input type="text"/>
Job Title*	<input type="text"/>
Practice Name*	<input type="text"/>
Vision User Number*	National Practice Code*
<input type="text"/>	<input type="text"/>

2. Complete the form and select **Submit**.
3. You will receive an email with your login details and passwords.

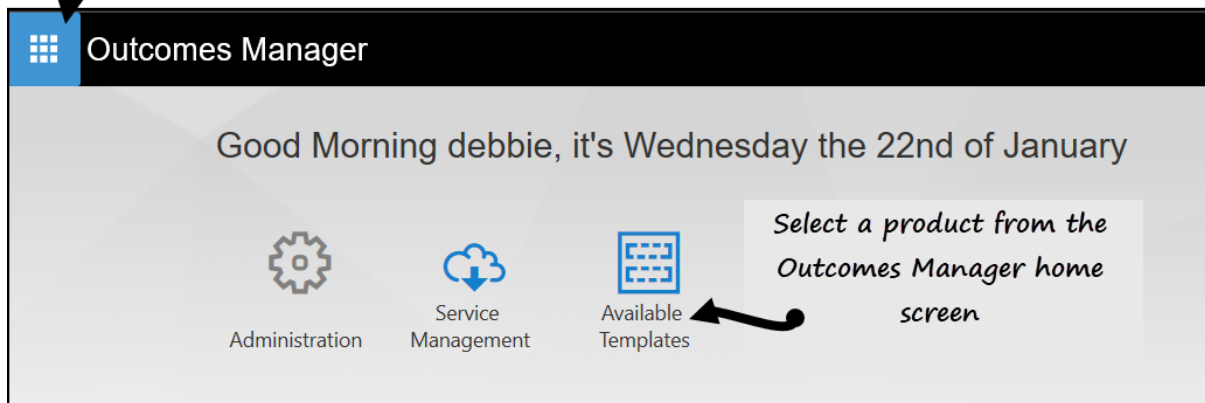
Logging into Outcomes Manager

Before logging into Outcomes Manager, you should have received your login details via email.

To login:

1. Select <https://outcomesmanager.visionhealth.co.uk/OM/Login.aspx>.
2. Enter your **Username** and **Password**.
3. Select **Sign in**.
4. The **Outcomes Manager** home page displays:
5. Select a product from the home screen or use the navigation option.

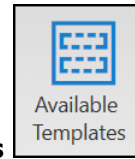
You can also select a product from the navigation bar. This also enables you to toggle between products



6. From the Home screen the following options are available:
 - **Administration** – Manage user accounts
 - **Service Management** – Manage uploaded templates
 - **Available Templates** - View and download templates

Viewing and Filtering Templates

To view templates that have been uploaded by other organisations and download them:



1. From the **Outcomes Manager** screen select **Available Templates**
2. A list of templates display:

Id - This is generated by the Outcomes Manager support team and is for internal use

This icon indicates that you have requested a template and are waiting for it to be downloaded

Id	Template Name	Template Group	Version	First Download	Last Download	Version Status
764	Annual Warfarin Review	Practice Templates	N/A	N/A	N/A	
1090	Anti Coagulation	National programmes	N/A	N/A	N/A	
792	INS - CARE HOME DES TEMPLATE	NICE Guidelines	N/A	N/A	N/A	
786	Paramedic Consultation	NICE Guidelines	N/A	N/A	N/A	
846	Pregnancy	SIGN Guidelines	N/A	N/A	N/A	

Version Status also displays with a corresponding legend

Template Name and Group that the template belongs to

Template version and history

This icon indicates you are the owner of this template (eg you have uploaded it)

Version Status Legend:

- Awaiting Download (Red)
- Not Used (Grey)
- Out of Date (Orange)
- Owner (Purple)
- Up to Date (Green)

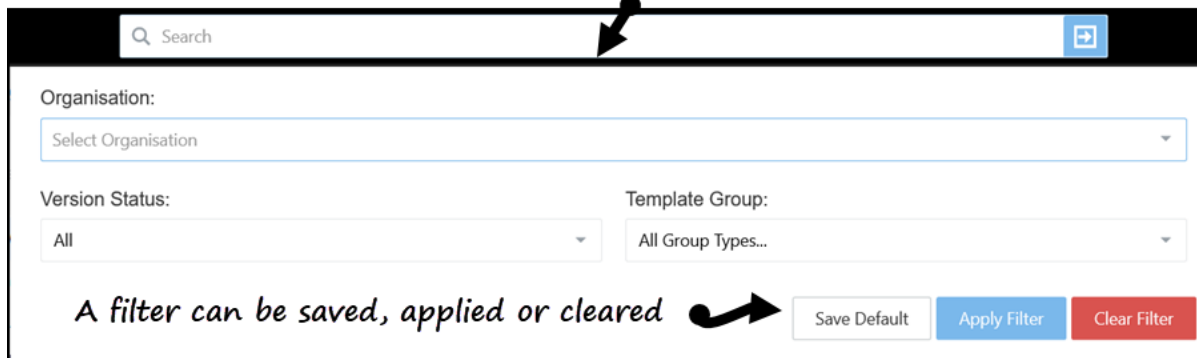
Note – Selecting a template also displays template details eg version history, owner.

3. To search for a template, **click** in the **search box** and type part of the template name. Templates that contain the characters you have used in your search are highlighted in the list of available templates:



4. **Clicking** in the **search box** also displays the option to filter templates. The following filters are available:

Click in the Search box to view the filter options. For example, organisations, version, template group



Organisation:
Select Organisation

Version Status: All

Template Group: All Group Types...

A filter can be saved, applied or cleared ✓

Save Default Apply Filter Clear Filter

- **Organisations** – Any Vision organisation including CCG’s, Practices, Health Board
- **Version Status**
 - **All** – All templates
 - **Awaiting Download** – Templates you have requested to download
 - **Not Used** – The template has never been downloaded
 - **Out of Date** – A template is classified as out of date if a new version has been uploaded by the owner and your practice has not downloaded it yet
 - **Owner** – Filter your templates
 - **Up to Date** – The template is on the latest version
- **Template Groups**
 - **All Group Types**
 - **National programmes**
 - **Nice Guidelines**
 - **Practice Templates**
 - **SIGN Guidelines**

Note – New groups can be added by request to the helpdesk.

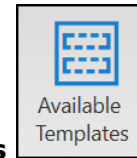
5. To apply a filter, select **Apply Filter** or if you want to save a filter as a default for future use, select **Save Default**. **Clear Filter** removes any filters applied or saved.



Save Default Apply Filter Clear Filter

Messaging a Template Creator/Author

Within Outcomes Manager you can message a template author/creator. For example, to get more guidance on a template before downloading it. To do this:

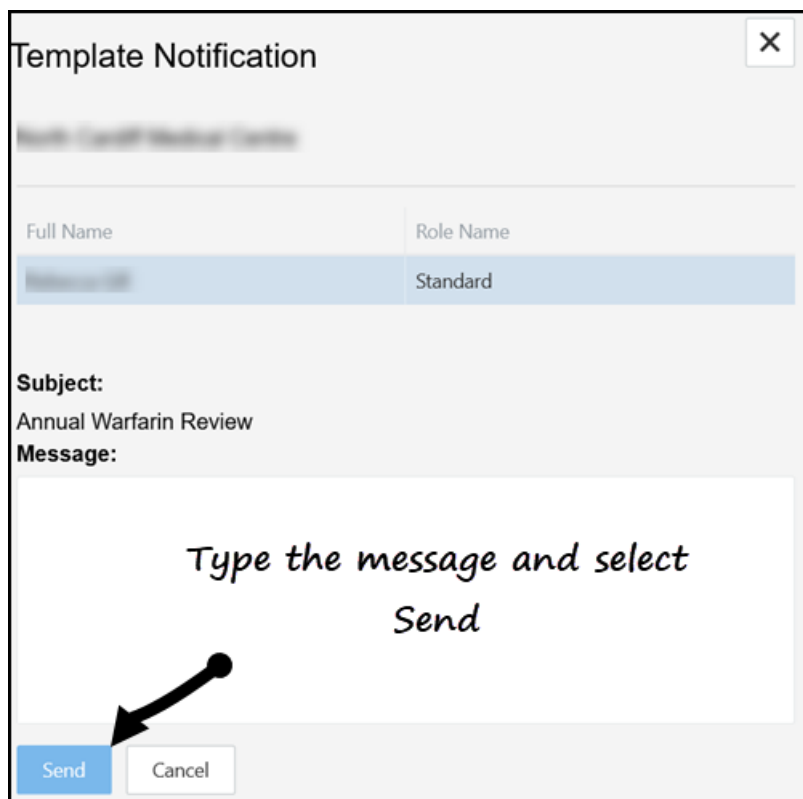


1. From **Outcomes Manager**, select **Available Templates**



2. At the top left of the screen select **Message Author**

3. The **Template Notification** screen displays:

A screenshot of a "Template Notification" dialog box. At the top, it says "Template Notification" with a close button (X). Below that, there's a header "Health Care Professional Details". A table shows "Full Name" as "Helen Smith" and "Role Name" as "Standard". Below the table, it says "Subject: Annual Warfarin Review" and "Message:". A large text area contains the instruction "Type the message and select Send". At the bottom, there are "Send" and "Cancel" buttons. An arrow points to the "Send" button.

4. Type the message and select **Send**.

5. The Author can access notifications from all Outcomes Manager screens by

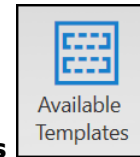


selecting **Notification**.

Note – This also displays general notifications regarding Outcomes Manager, for example, upgrades. For more information – see [Outcomes Manager help](#).

Downloading Available Templates

To download a template:



1. From **Outcomes Manager**, select **Available Templates**
2. Highlight the template you want to download.



3. At the top left of the screen select **Use Template**
4. The **Use Template** disclaimer screen displays:

Select Use Template

You can also message the author

The Use Template screen displays. To continue with the Download, select OK

The screenshot shows a web application window titled "Service Management". On the left, there is a table with columns: Id, Template Name, Template Group, Version, First Download, Last Download, and Version Status. The table contains several rows, with the row "792 INS - CARE HOME DES TEMPLATE" highlighted in blue. Below the table are two buttons: "Use Template" (with a wrench icon) and "Message Author" (with an envelope icon). On the right, a modal window titled "Use Template" is open. It contains a disclaimer text: "Templates available in this library are created by other Vision users. They have not been reviewed or clinically validated by Vision, and Vision accepts no responsibility for accuracy or safety. Please ensure you review the template before using in clinical practice to ensure you are satisfied with the safety of any content." Below the disclaimer is another line of text: "Any queries regarding the content of the template should be directed to the original end - user creator, using the messaging feature." At the bottom of the modal, it asks "Do you accept the terms of this disclaimer?" and has two buttons: "Ok" and "Cancel". A small red square icon with the text "Awaiting Download" is visible next to the "Ok" button. Hand-drawn arrows and text annotations point to the "Use Template" button in the top left, the "Message Author" button, the "Ok" button in the modal, and the "Awaiting Download" status in the table.

Id	Template Name	Template Group	Version	First Download	Last Download	Version Status
764	Annual Warfarin Review	Practice Templates	N/A	N/A	N/A	⊘
1090	Anti Coagulation	National programmes	N/A	N/A	N/A	🔄
792	INS - CARE HOME DES TEMPLATE	NICE Guidelines	N/A	N/A	N/A	🔄
786	Paramedic Consultation	NICE Guidelines	N/A	N/A	N/A	👤
846	Pregnancy	SIGN Guidelines	N/A	N/A	N/A	👤

5. Select **OK** to accept the terms of the disclaimer.
6. The prompt **Distribution Updated** displays on the **Use Template** disclaimer screen and the version status changes to **Awaiting Download** .

7. You now need to login to **Vision** as usual.

8. From the Windows Notification Area, right click on the **Vision+** icon and select **Download Web Files**.

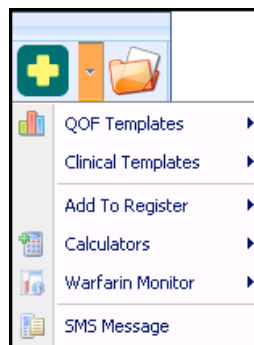
9. Select the template you wish to download by selecting the **Download** box.

10. Next, select **Download** from the toolbar.

Click Download


Group Name	Web Version	Local Version	Status	Download	Delete
Group Type : Attachments					
Document Management (Kent)	1	1	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
Group Type : Cardiovascular calculators					
QRISK3	14	14	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
Group Type : Enhanced Services programmes					
AF LIS (Warwickshire North CCG)	5	5	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
AF With Anticoag (CRCCG)	2	2	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
z Richmond Public Health LCS - NHS Health Checks	42	42	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
Group Type : Lifestyle calculators					
Body Mass Index	5	5	Up to date	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Group Type : NICE Guidelines					
Lipid Modification (Based on CG181)	13	13	Up to date	<input type="checkbox"/>	<input type="checkbox"/>

- 11.** The template is automatically available to everyone in the practice and is accessed from the patient record via the **Vision+ floating toolbar – Clinical Templates**.



Deleting Downloaded Templates

If after downloading a template, you decide you no longer want to use it, you can delete it. To do this:

1. Login to **Vision** as usual.
2. From the Windows Notification Area, right click on the **Vision+** icon  and select **Download Web Files**.
3. Select the template you wish to delete by selecting the **Delete** box.
4. Select **Delete** from the toolbar:



Click Delete

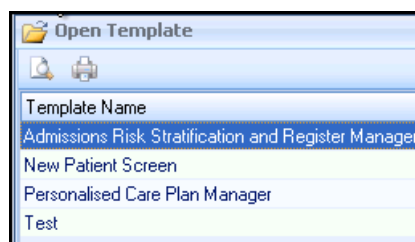
Group Name	Web Version	Local Version	Status	Download	Delete
Group Type : Cardiovascular calculators					
QRISK3	14	14	Up to date	<input type="checkbox"/>	<input type="checkbox"/>
Group Type : Enhanced Services programmes					
Enhanced Services (WN CCG) Core Services - Central Extract	13	13	Up to date	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Personalised Care Plan Manager	48	48	Up to date	<input type="checkbox"/>	<input type="checkbox"/>

Uploading Templates

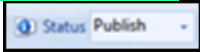
To upload a Vision+ Template for distribution to other Vision organisations.

Note - You must obtain an Outcomes Manager account and login details so that you can see the template you have uploaded- See [Obtaining a login account for Outcomes Manager](#).

1. Login to **Vision** as usual.
2. From the Windows Notification Area, right click on the **Vision+** icon  and select **Template Designer**.
3. To open an existing template, select **Open** .
4. Choose the template from the list and click **OK**.

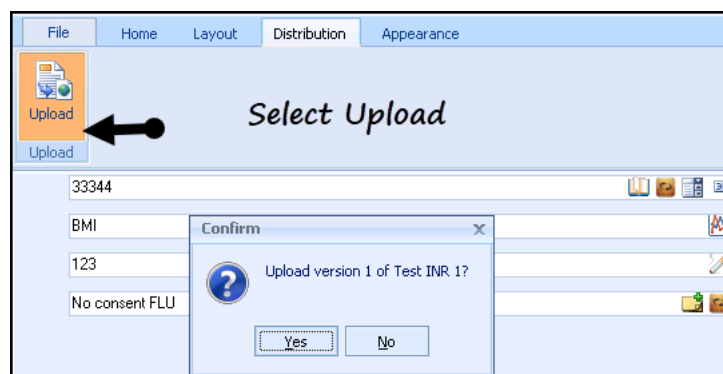


Note - For advice on how to create Vision+ template see [Vision+ Template Design help](#).

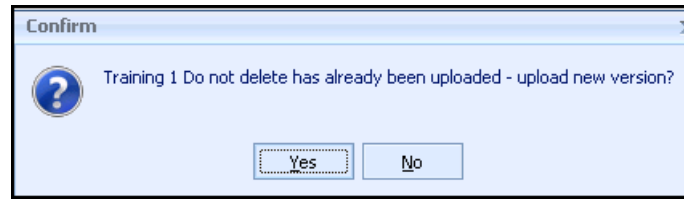
5. From the home page, change the template status to **Publish** .
6. Select the **Distribution** tab.
7. The distribution screen displays.

Note - If the template status is **Test** or **Develop** the warning message 'The template status must be set to publish before uploading' displays.

8. Select **Upload**. The version and name of the template displays. To continue with the upload, select **Yes**



If you have previously uploaded the template, the following warning message displays. Click **Yes** to continue and a new version is uploaded or select **No** to keep a local copy of the template.



Training Tip - If you do not want to upload and override an existing template you can either rename it by selecting **File** and **Rename** or if you want to create a copy of the template choose **File** and **Save As**.

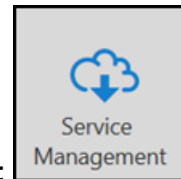
9. Once uploaded, a confirmation message displays with the version and name of the template. The template is automatically uploaded to a group called "Practice Templates".

Note - To view and manage uploaded templates – see [Managing Uploaded Templates in Outcomes Manager](#).

Managing Uploaded Templates in Outcomes Manager

To view uploaded templates:

1. Log into **Outcomes Manager** – see [Logging into Outcomes Manager](#).



2. From the home screen select **Service Management**
3. The template summary screen displays all templates your organisation has uploaded.
4. To manage uploaded templates, for example, add a description or add it to a different group. Highlight the template on the list.

The screenshot shows the Service Management dashboard. At the top, there is a search bar. Below it, there are two donut charts: "Distribution Status" (red) and "Version Status" (yellow). The main area displays "All your uploaded templates are listed" with a table of templates. A search bar is highlighted with an arrow and the text "To filter the templates click in the search box". A row in the table is highlighted with an arrow and the text "To manage the template, for example, add a description. Highlight the template on the list or from recently viewed".

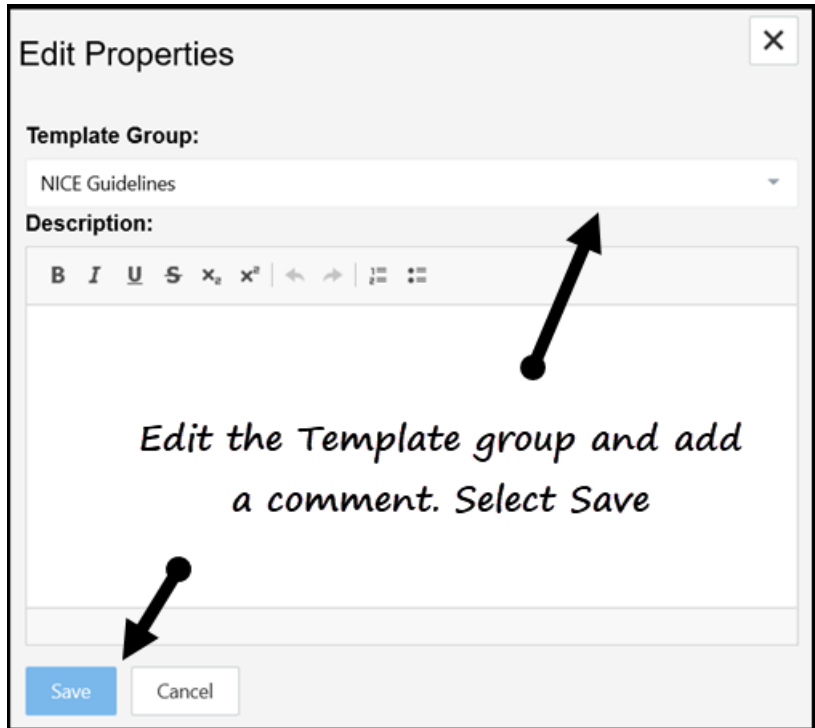
Id	Template Name	Template Group	No. of Practices	No. Downloaded	Distribution Status	Up To Date	Out Of Date	Latest Version	Version Status	Last Viewed
786	Paramedic Consultation	NICE Guidelines	2	0	⚠	0	0	1	⚠	21-01-2020
846	Pregnancy	SIGN Guidelines	1	0	⚠	0	0	1	⚠	N/A

To manage the template, for example, add a description. Highlight the template on the list or from recently viewed

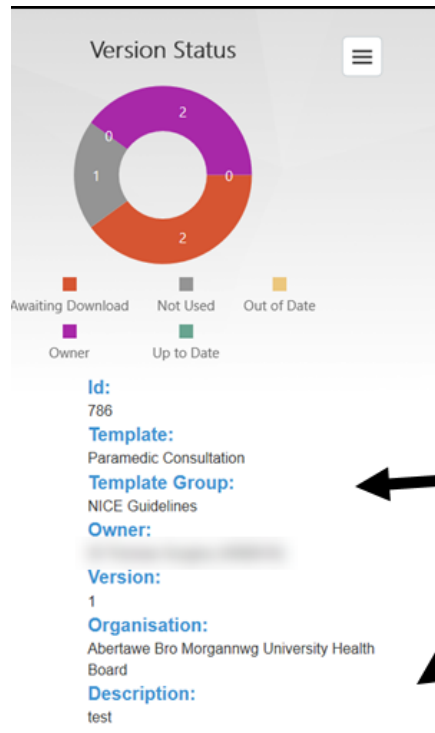
5. Details of the template display. Select **Properties** :

The screenshot shows the Properties Edit screen. At the top, there are three buttons: "Back", "Properties", and "Remove". Below them, there is a "Practice" label and a dropdown menu showing "University Health". An arrow points to the "Properties" button with the text "Select Properties".

6. The **Properties Edit** screen displays:
7. From here you can update the template group and add a description.



- 8.** The template group displays when listing and filtering templates. The description displays when viewing a template version status:

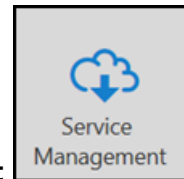


Version status displays the group and description

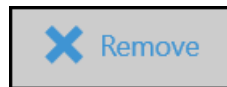
Removing a template

To remove a template and stop further distribution:

1. Log into **Outcomes Manager** – see [Logging into Outcomes Manager](#).



2. From the home screen select **Service Management**.
3. The template summary screen displays all templates your organisation has uploaded.
4. Highlight the template to be removed.



5. Select **Remove**.
6. A message displays confirming that you wish to remove the template.
7. The template is automatically deleted from those practices that have downloaded it.

Administration

The Administration section of Outcomes Manager enables you to manage users. For more information please refer to the [Outcomes Manager help](#).