Clinicalvision 5.3 R6
Quick Reference Templates

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Table of Contents

1 Introduction 3
2 Create a Quick Reference Template 3
2.1 Patient Templates 5
2.2 Staff Templates 6
3 Assigning Roles 7
4 Quick Reference Templates on Home Page 9
5 Quick Reference Templates in Workflows 9

1 Introduction

A Quick Reference, or ‘Overview’ Template can be created to show a set of details relevant to a selected patient or, where no patient has been selected, the currently logged-on user. A Patient Overview is a screen that pulls multiple pieces of patient information together into a single screen for review purposes. A Staff Overview displays data relating to the current user rather than the patient, for example, the items in the user’s inbox, orders waiting to be signed.

Overviews are derived from templates which can be created using the new Quick Reference Template Manager feature in clinicalVision’s System Setup navigation. Individual templates can then be assigned as available for selection to specific user roles or designated as the Home Page default.

Quick Reference (overview) templates can be used in one of two ways:

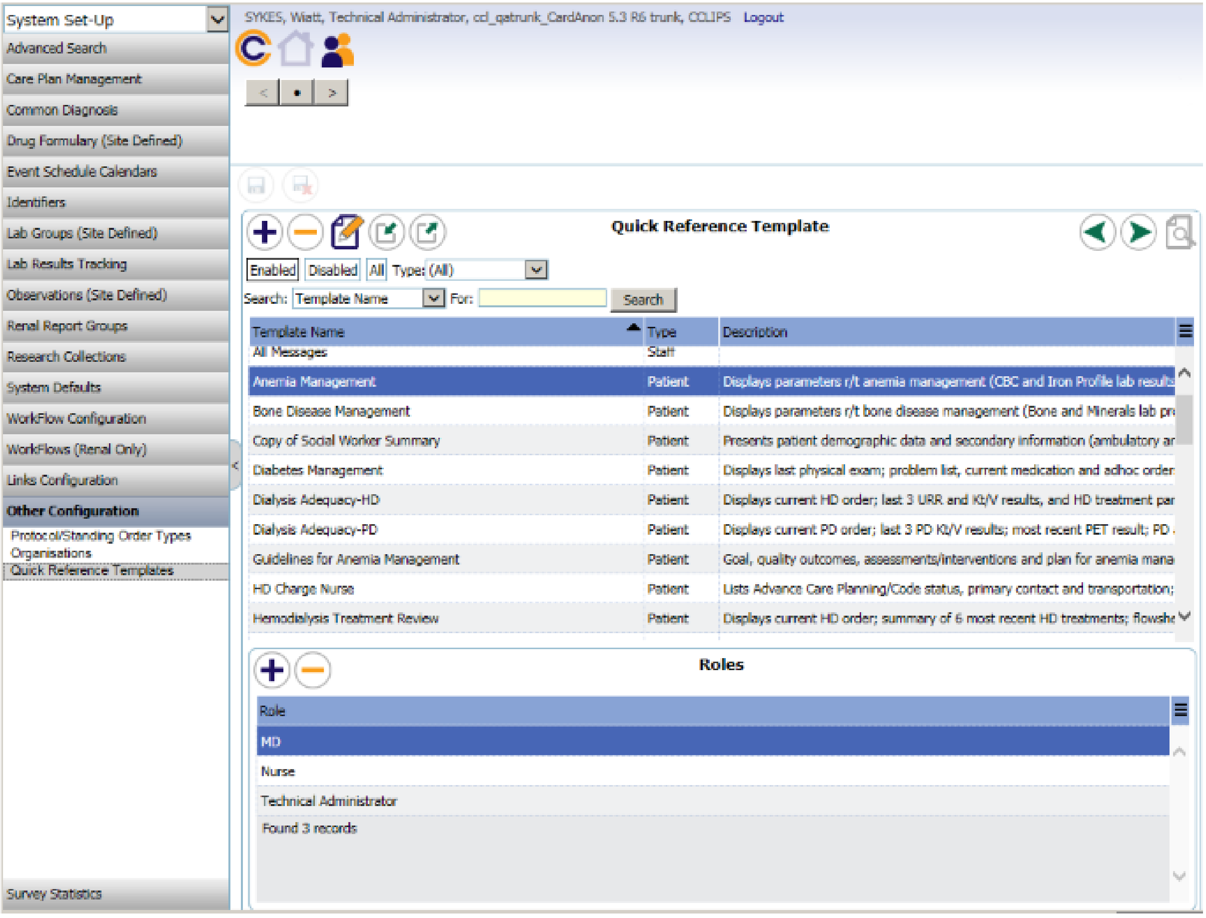
- embedded on the Home Page
- included in Workflow pages.

In the first case, an administrator or user will be able to choose which of the templates assigned to their role to use as the default Home Page overview. In the second case, users with the appropriate permission can incorporate Quick Reference templates into new or existing workflows.

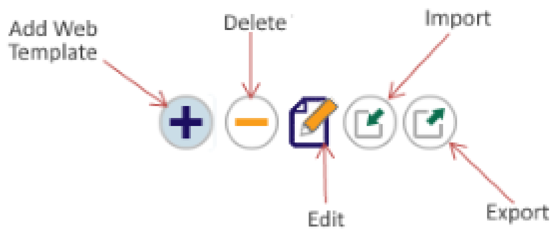
2 Create a Quick Reference Template

From the System **Set-up – Other Configuration** navigation, select the **Quick Reference Templates** option to create a personalized Staff or Patient template. Quick Reference templates can be either displayed on the Home Page for the currently logged on staff member or selected patient or incorporated into patient Workflows.

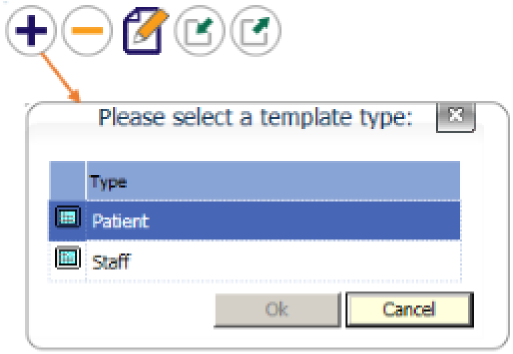
The Quick Reference Templates option displays a list of all the currently defined Staff and Patient templates and, beneath this, a list of all the user roles with which the currently selected template is associated:



The toolbar displayed at the top left of the template list is the same as that displayed when selecting the Template manager from the Tools menu, with the exception that there is no option to create a Document Template:

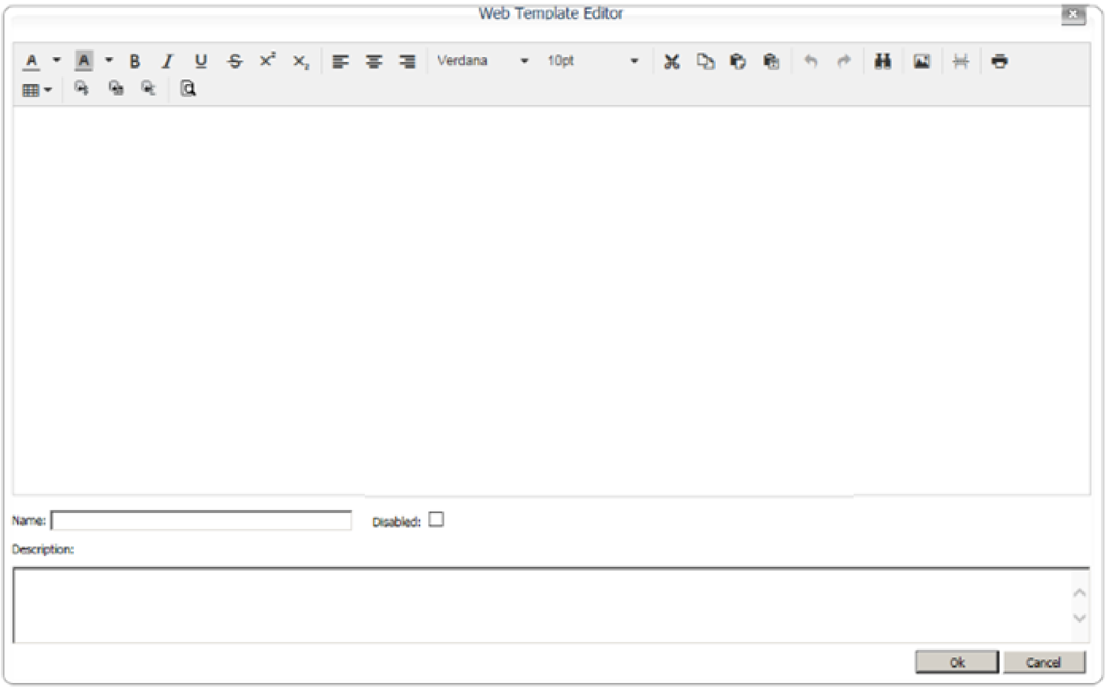


To create a new template, click the Add button in the toolbar (top left) to select a template type:



2.1 Patient Templates

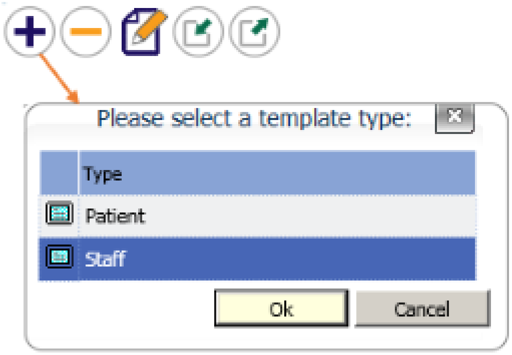
With the ‘Patient’ option selected, click OK to open the Template Editor. This is the same template editor that is accessed from the Template Manager option in the Tools menu, with the single exception that the ‘Type’ field is missing, as the template will always be an overview.



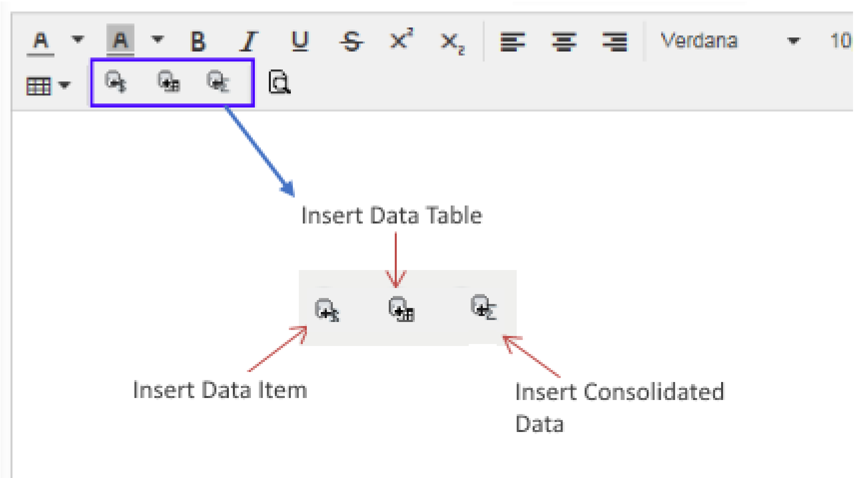
A Patient Overview derived from a Quick Reference Template is displayed on the Home Page when a patient is selected.

2.2 Staff Templates

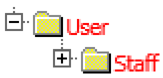
A Staff Overview, derived from a Quick Reference Template, is displayed on the Home Page where no patient, or no patient template, has been selected. It is used to display information pertaining to the currently logged-on user, specifically Messages and Order Details.



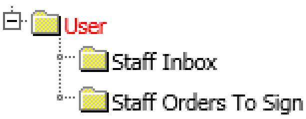
With the 'Staff' option selected, click OK to open the Template Editor, as before. For Staff templates, the lists of Data Items, Data Tables and Consolidated Data that are available are constrained to those which relate directly to the currently logged-on user.



Insert Single Data Item



Insert Data Table or Consolidated Data



3 Assigning Roles

When you have created a Quick Reference template it will not, initially, have any roles associated with it. To enable a user to select it as an Overview from the Home Page, you will first need to associate it with one or more user role(s).

With the template selected in the upper grid, click on the Add button in the lower grid to display a list of all the available user roles. When you select a role from the list, it will be added to the list of associated roles in the lower grid. Users logging on with that role will be able to select the template from their Home Page.

On the Home Page, an overview template (Staff or Patient) that has been specifically selected by a user takes precedence over the system-defined default overview template, where one has been defined.

4 Quick Reference Templates on Home Page

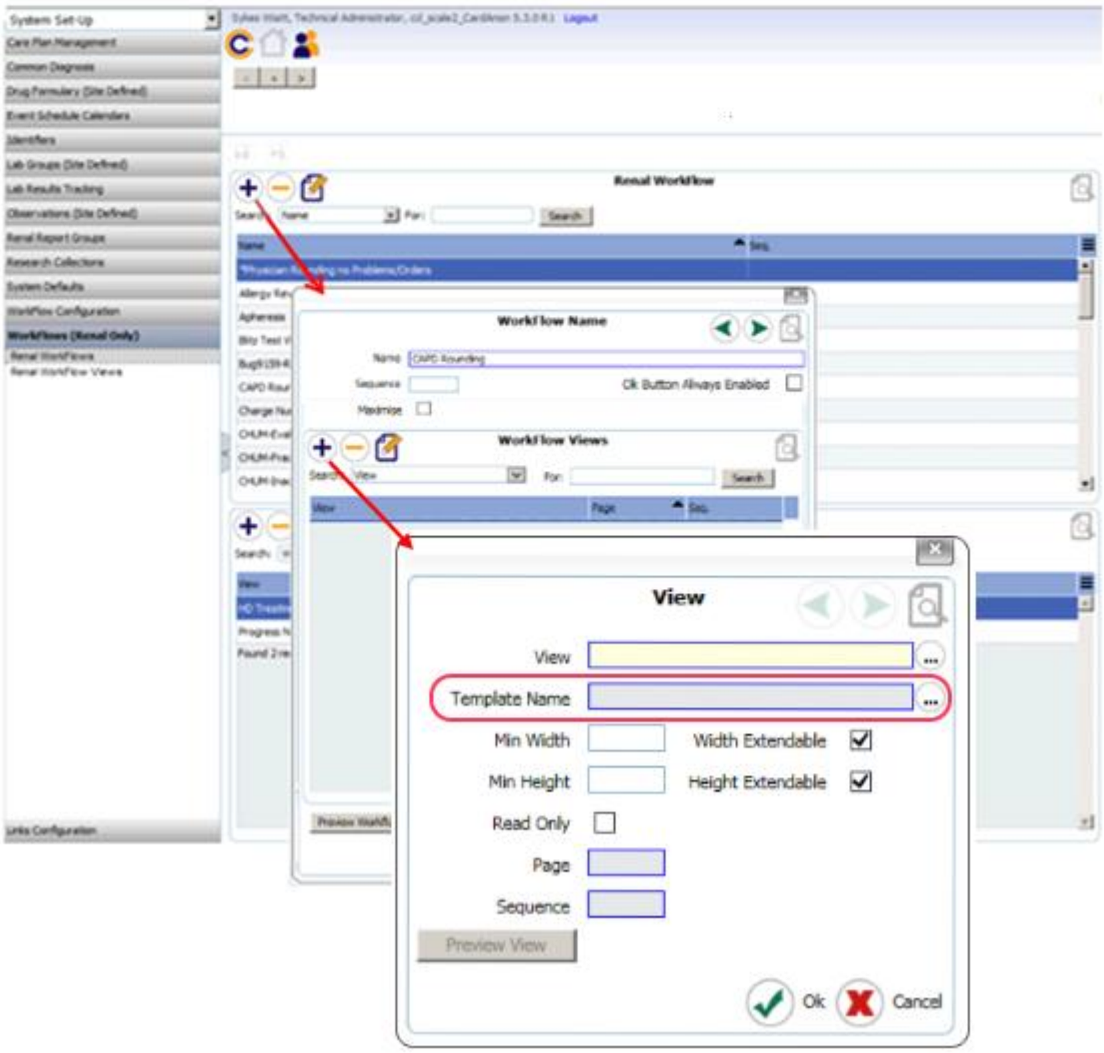
A Staff and/or a Patient Overview is displayed on the Home Page to show a set of details relevant to the currently selected patient or, where no patient is selected, the currently logged-on user. The Overview template may be a default allocated to a specific role by an Administrator or selected from a list of pre-defined templates with the appropriate role allocation.

A description of this feature can be found on the Home Page Layout release document.

5 Quick Reference Templates in Workflows

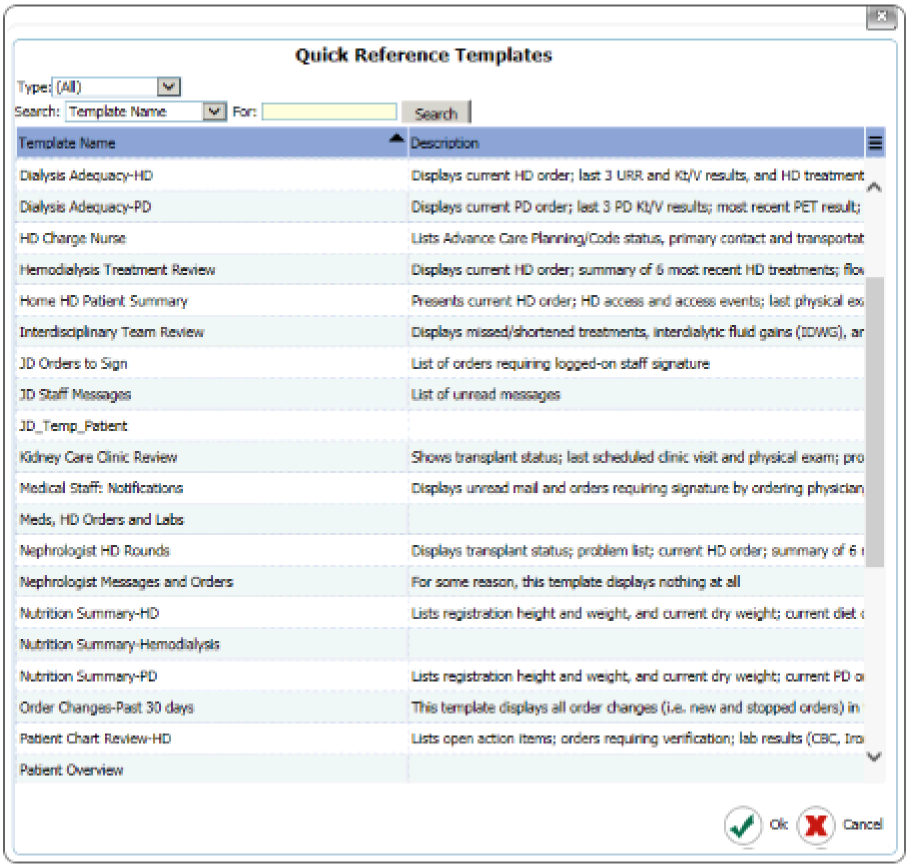
A quick Reference template can be added to a Workflow Template in addition to the workflow views available in previous releases of clinicalvision.

Select the **Workflows** option from **System Set-Up – Workflows** Configuration (or Renal Workflows from the System Set-Up – Renal Workflows) navigation to create a new workflow template or to edit an existing one.:



Adding a pre-defined Quick Reference Template

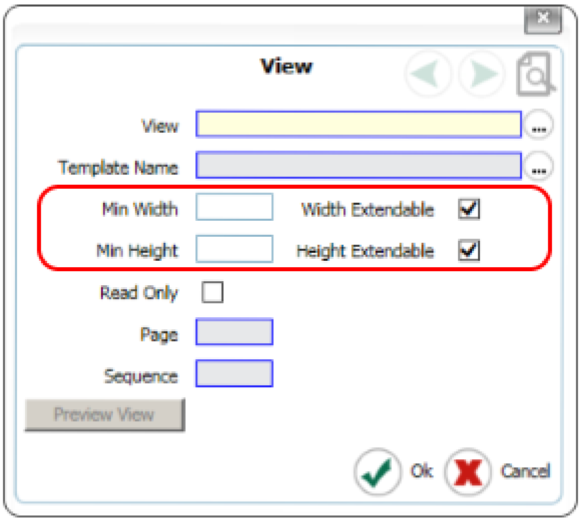
- Click on the ellipsis button beside the Template Name field to display a list of overview templates. By default, all Staff and Patient templates will be listed:



Use the ‘Type’ filter (top left) to display just Patient or Staff templates as required. Further templates can be added in exactly the same way as workflow views. Note that when selecting a Quick Reference template, the ‘Read Only’ checkbox is removed from the View dialog.

Height and Width

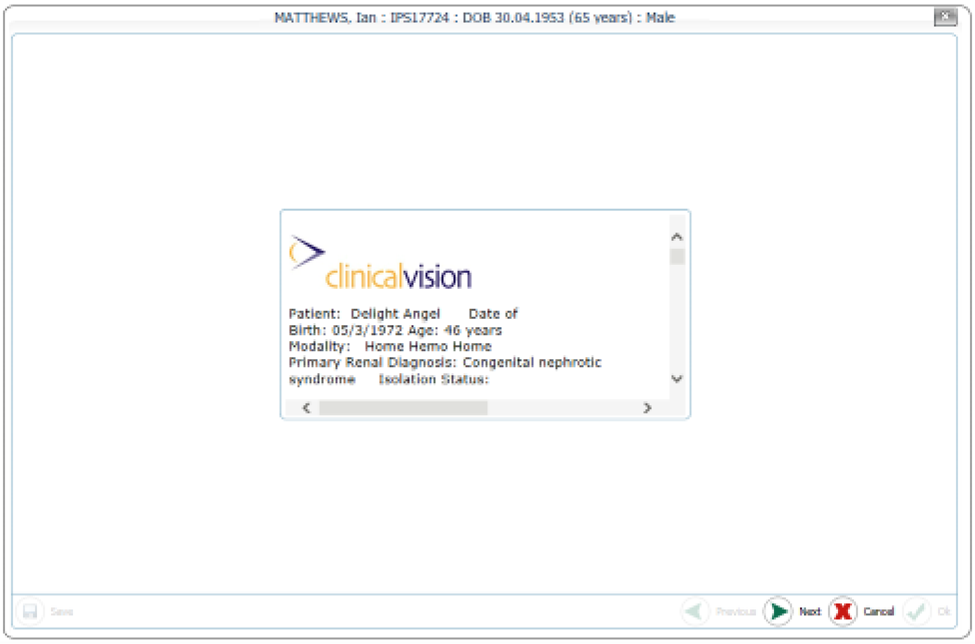
You can control how the workflow pages will display using the Width and Height options on the view dialog:



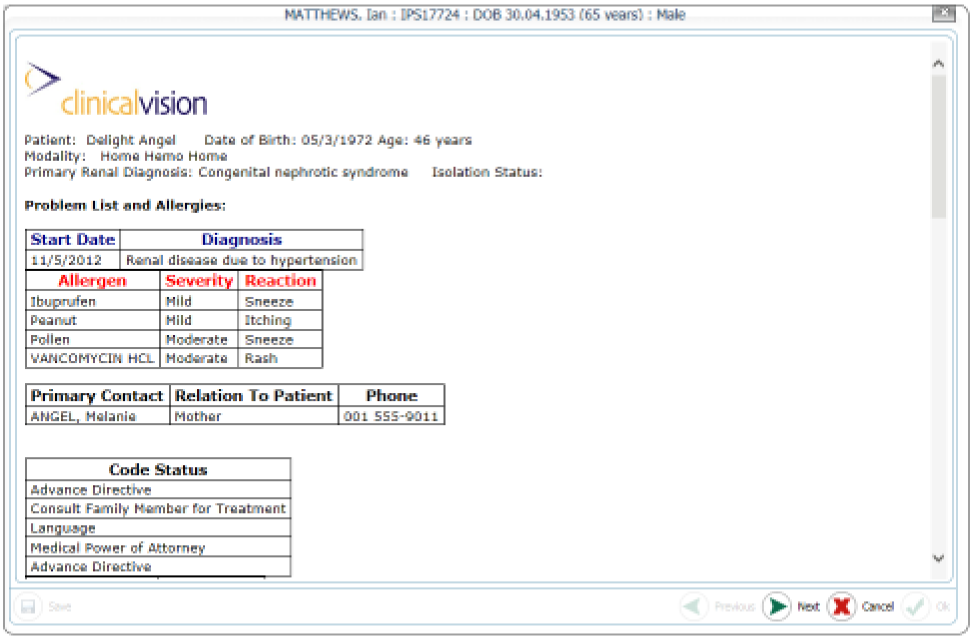
Note that the ‘Preview View’ button will be disabled for overview templates.

Unlike workflow views, Quick Reference templates have no fixed height and width, so the Min Width and Min Height fields are mandatory and default to 400 and 200 respectively. If the Width Extendable and Height Extendable fields are not checked, clinicalvision will attempt to display the overview in an area the size of the width and height settings within the overall size of the workflow. If the Extendable fields are checked, the template area will be expanded to fill the available space:

Width Extendable and Height Extendable unchecked (false), default minimum Width and Height



Width Extendable and Height Extendable checked (true) default minimum Width and Height


MATTHEWS, Ian : IPS17724 : DOB 30.04.1953 (65 years) : Male

clinicalvision

Patient: Delight Angel Date of Birth: 05/3/1972 Age: 46 years
Modality: Home Hemo Home
Primary Renal Diagnosis: Congenital nephrotic syndrome Isolation Status:

Problem List and Allergies:

Start Date	Diagnosis
11/5/2012	Renal disease due to hypertension

Allergen	Severity	Reaction
Ibuprufen	Mild	Sneeze
Peanut	Mild	Itching
Pollen	Moderate	Sneeze
VANCOMYCIN HCL	Moderate	Rash

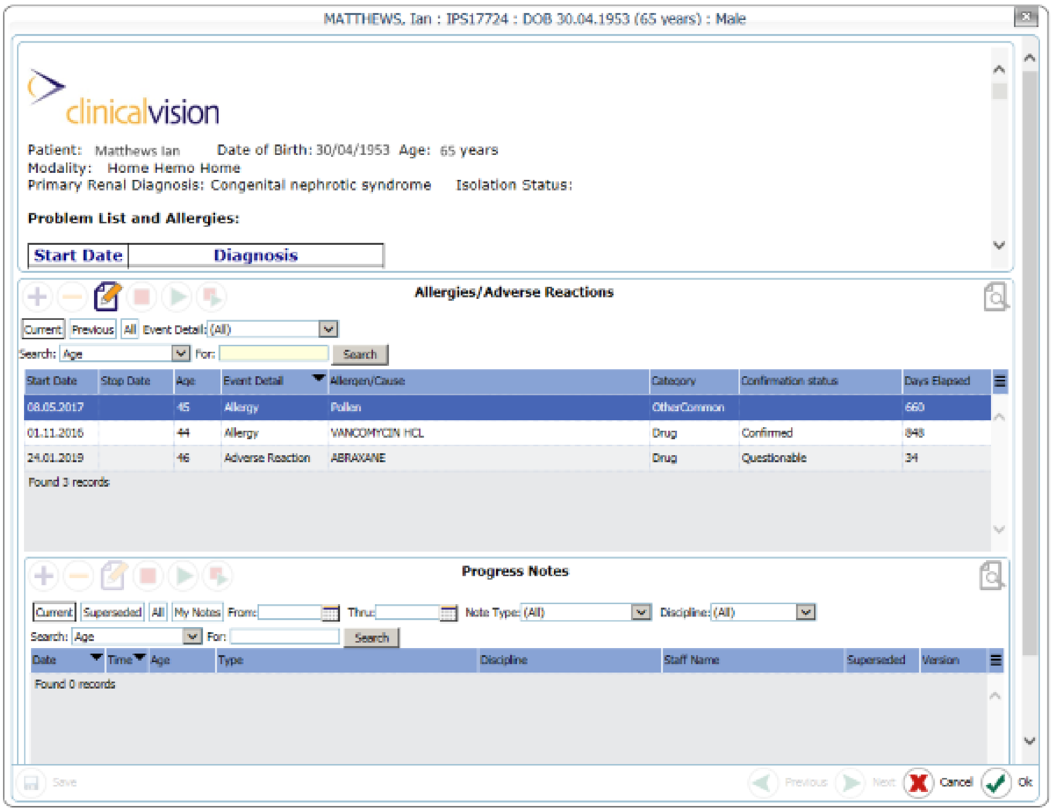
Primary Contact	Relation To Patient	Phone
ANGEL, Melanie	Mother	001 555-9011

Code Status
Advance Directive
Consult Family Member for Treatment
Language
Medical Power of Attorney
Advance Directive

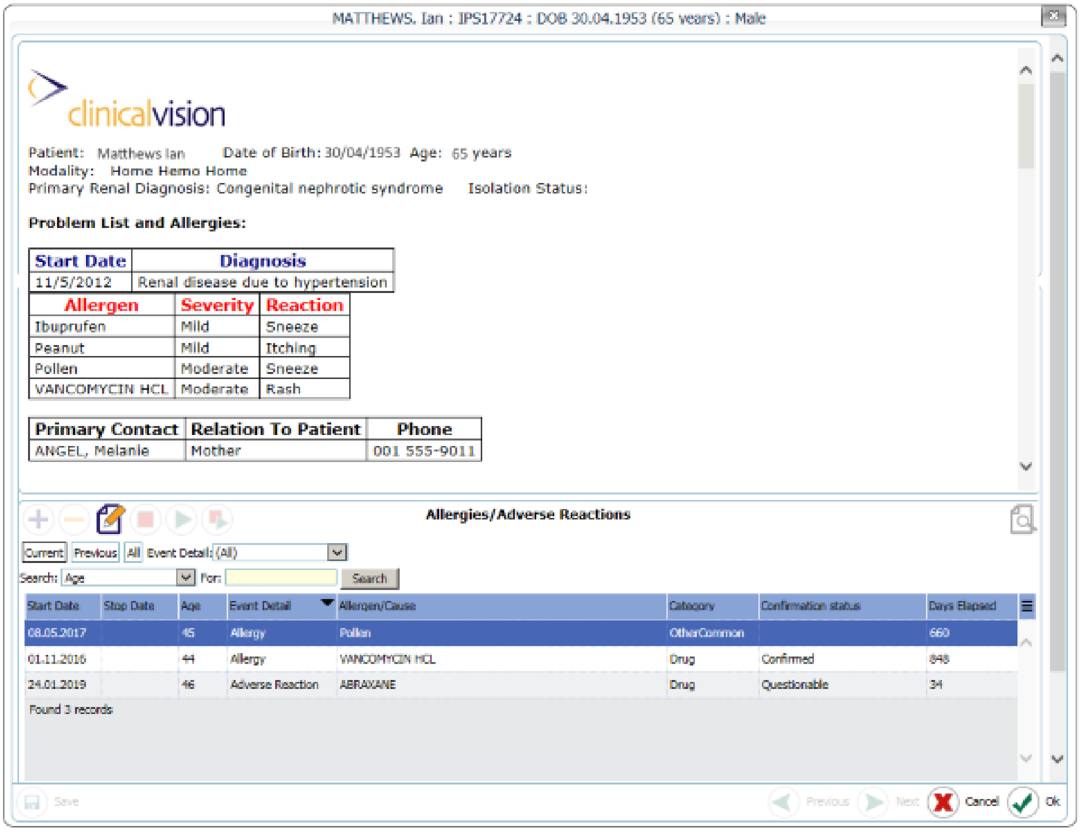
Save Previous Next Cancel Ok

In contrast, where a workflow view is selected, the minimum Height and Width values will only be used if the actual size of the view as it normally appears in the application is smaller than the values indicated. If the Extendable fields are selected, the view will be expanded to occupy the full width and height of the Workflow.

You can inspect your workflow at any time by clicking the ‘Preview Workflow’ button. In this example, there is one patient Quick Reference (page 1, sequence 1) and one workflow view (Page 1, sequence 2). The quick reference uses the default minimum width and height values (400, 200), with the extendable checkboxes checked:



In the following example, the minimum height value for the quick reference has been amended to 400 and so takes up a proportionally larger part of the available screen area:



When you have completed and saved your Workflow definition it will be displayed in the list on the main ‘Renal Workflow’ page. You will be able to access it from the **Patient Management** navigation by selecting the ‘WorkFlows’ option from the CV menu or the ‘User Workflows’ option from the **Patient Management – Observations** navigation.