

VeForms – The Basics

INPS



Table of Editions and Contents

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15/9/2009	001	Introduction to using VeForms	PDF
22/9/09	002	Change to product name and saving Drafts JTHO review	PDF
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5/11/09	005	Change to the Editing process	PDF
11/11/09	006	Q3 Read requirement entered and requesting information	PDF
10/03/10	007	Update requested by HMAG, LHOL, LHAY	PDF
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25/01/11	009	ESTU Review	Docx
01/02/11	010	Screen shots updated per LHOL and LHAY (HDOO)	PDF

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VeForms – The Basics

Introduction

Vision Electronic Forms, known as VeForms, enable the design of documentation, assessments, referrals and general data entry forms.

Data can be written back to Consultation Manager automatically or, for data that has no Read code, it can be stored as part of the PDF attachment that is created by VeForms. Calculations can also be written into VeForms.

VeForms can be passed around within a practice to enable multiple staff input.

Corresponding Clinical Audits can be written to enable searching on all data recorded whether Read coded or not.

Wound Assessment VeForm

Patient Information

DOB: [] Sex: []

NHS: [] Age: [] Years: []

Registered Address

Home: []

Mobile: []

Work: []

Email: []

Consultation Type

New Wound Assessment Length of time present: []

Reassessment

Dressing Change Date of last dressing: []

Assessment Details (New wounds and Re-assessments Only)

Referred by: [Select...]

Patient has given consent to photograph wound?

Photograph of wound taken?

Existing Drug Allergies: [%fs]

Existing Factors Affecting Healing (New wounds only)

Does the patient currently suffer from Diabetes?

New Blood Pressure: [] [] Last Blood Pressure Readings: [%fs]

If result is outside normal parameters make sure BP is being monitored

Last Height: [] Last Weight: []

eventdate, " Height (Metres) ",heightcm eventdate, " Weight (Kg) ",weightkg

Height: [] Metres Waist Circumference: [] cm

Weight: [] kg

An example of a simple VeForm

VeForms are not designed to replace Guidelines; they are an additional option to enable a more flexible form design.

VeForms are aimed at both PCTs and practices, and can be requested from INPS via email at marketing@inps.co.uk for a consultancy charge.

Pre-Requisites

In order to use VeForms the following MUST be loaded on to your Vision workstation:

- **MS InfoPath 2007** – Please contact your PCT/HB if you are on a LAN, or INPS if you are a managed server.
- **.NET Framework v2.0** – .NET Framework v3.5 was loaded as part of DLM 313.
- **Quarter 3 Read codes 2009** - To check which version of the Read dictionary you have installed, go to the main Vision screen, click on **Help - About Vision**.

The VeForm Launchpad Guideline

VeForms are launched through Guidelines. We recommend that all the VeForms you use are launched from one guideline; this will make the locating and use of VeForms a quick and simple operation.

How to Create a VeForm Launchpad Guideline

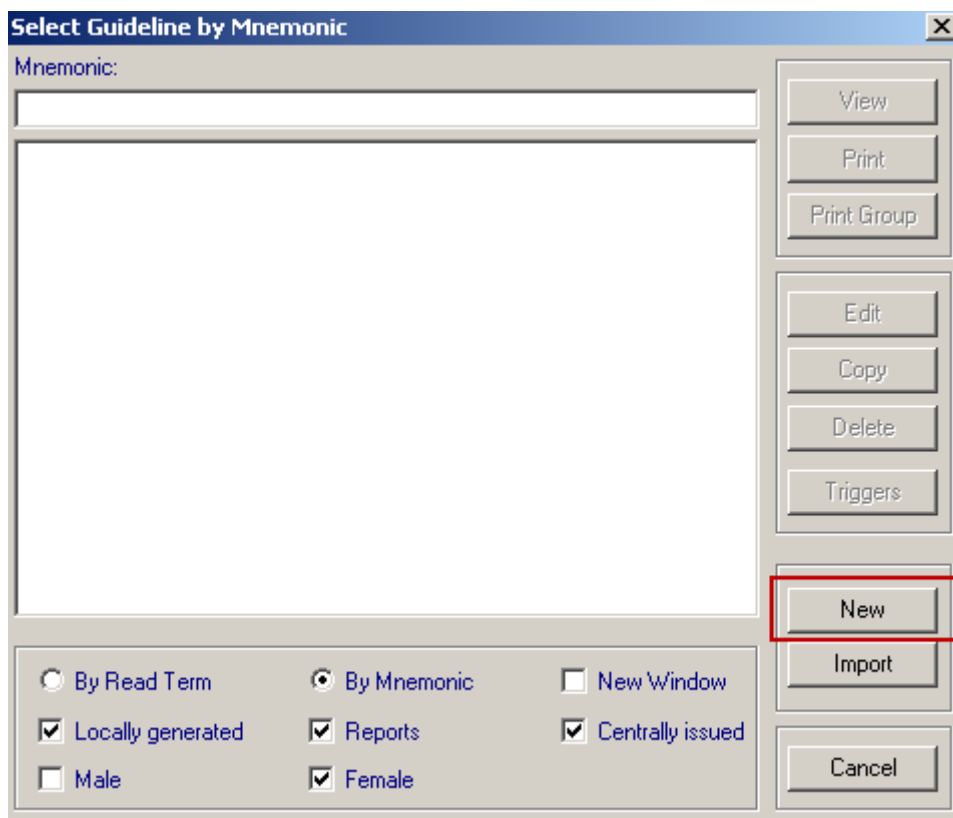
To create a Guideline from which to launch your VeForms:

1. From **Consultation Manager**, select **Guidelines – Select Guideline**.



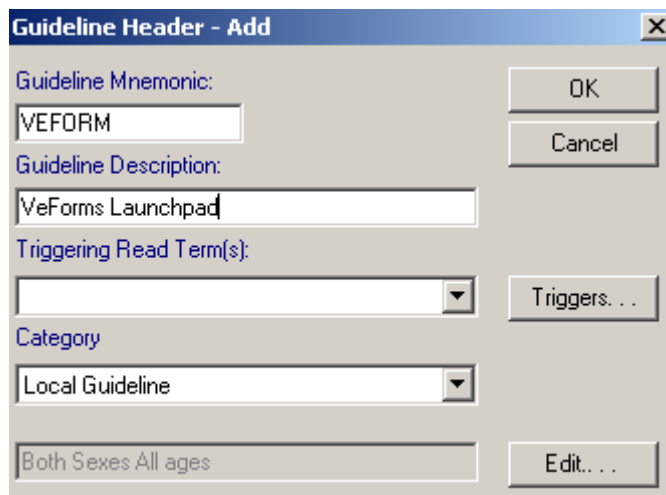
Guidelines – Select Guidelines

2. At the **Select Guideline by Mnemonic** screen, click **New**.



Select Guideline by Mnemonic – New highlighted

3. From the **Guideline Header – Add** screen:
 - Type **VEFORM** into the **Guideline Mnemonic**.
 - Type **VeForms Launchpad** into the **Guideline Description**.



Completed Guideline Header – Add

4. Click **OK**.
5. A blank Guideline is displayed with the Guideline Floating Tool bar displayed to the right of your screen.



Guideline Floating Tool Bar

6. VeForms can now be added to this Guideline. See [Adding VeForms to the VeForm Launchpad Guideline](#) step 6.

Adding VeForms to the VeForm Launchpad Guideline


The following steps take you through adding VeForms to a Guideline in a way that will result in them being displayed and accessed in a uniform manner.

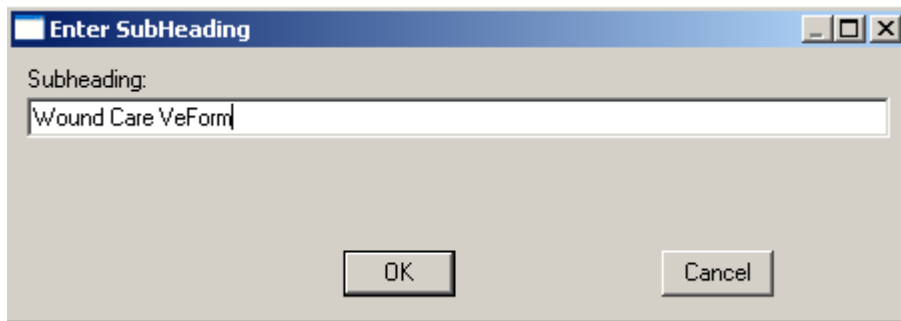
If you are adding a new VeForm to an established Guideline

1. From **Consultation Manager**, select **Guidelines – Select Guideline**.
2. In the Mnemonic box type - VEFORM and press the enter key.
3. From the list, highlight **VeForm Launchpad** and select **Edit**.
4. Click **OK** to **Guideline Header – Update screen**. The VeForm Launchpad Guideline is displayed for editing.
5. Click on the last item displayed on this Guideline.

If you are adding a new VeForm to a new Guideline

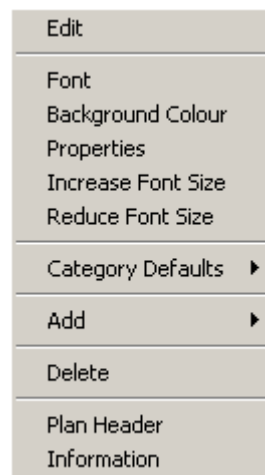
Continuing from step 6. above:

- From the floating toolbar, select the Subheading icon . Type in the name of the VeForm ie Wound Care VeForm.



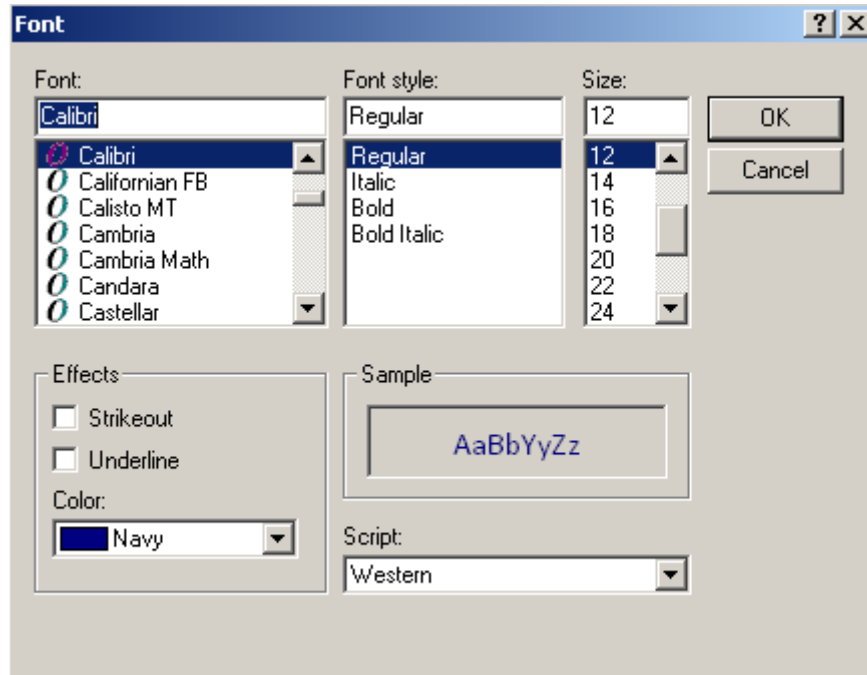
Example Enter Subheading

- Click **OK**.
- To standardise the way the VeForm name looks, right click on the **Subheading** that is now displayed on the Guideline.




Right click menu

- Select **Font** and set the following choices:
 - Font** – Calibri.
 - Font style** – Regular.
 - Size** – 12.



Completed Font screen

10. Click **OK**.

11. To add the link to the VeForm, select the Subheading icon  from the floating toolbar and type in the following:

<HTML>Click here to launch

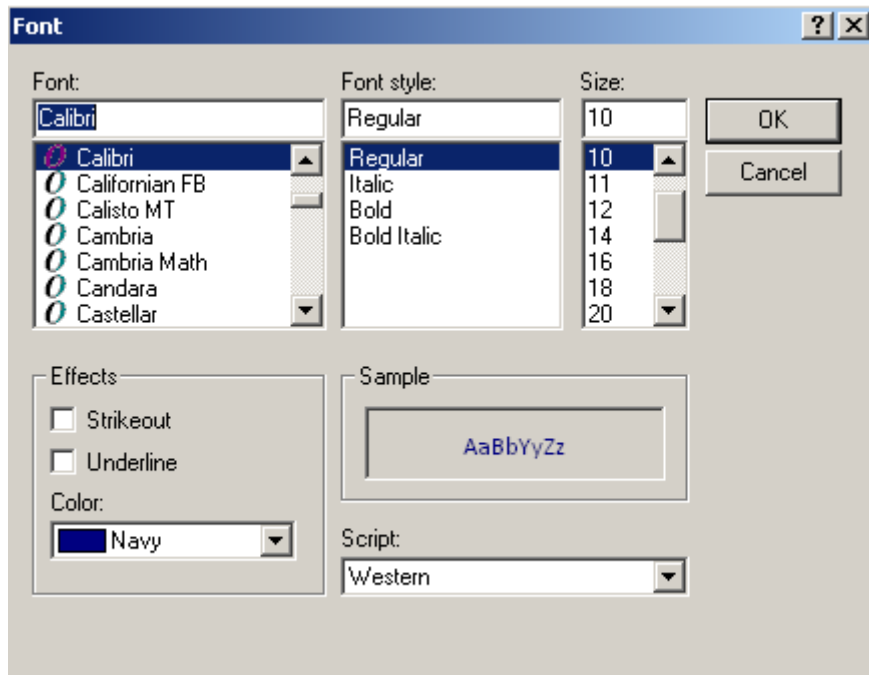
Replace nnnnnn.xsn with the file name of the VeForm.

12. Click **OK** to add the VeForm to the Launchpad .

13. Right click on **Click here to launch**.

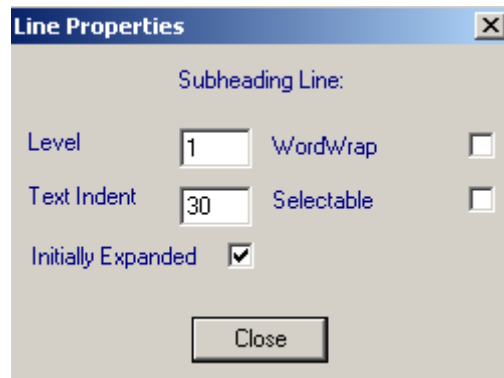
14. Select **Font** and set the following choices:

- **Font** – Calibri.
- **Font style** – Regular.
- **Size** – 10.





Completed Font screen

15. Click **OK**.
16. Right click on **Click here to launch** again.
17. Select **Properties**.
18. Change **Text Indent** to 30 by over typing.



Line Properties

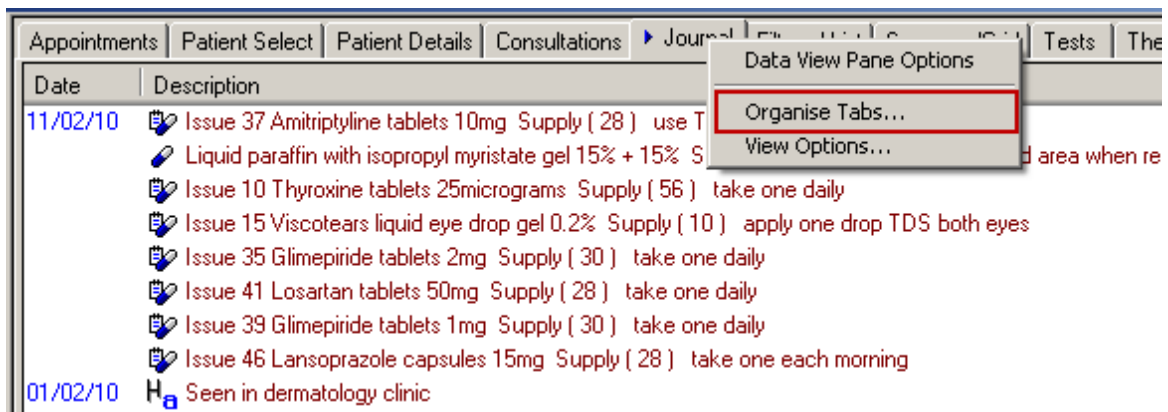
19. Click **Close**.
20. Click  to save the Guideline.
21. Repeat steps 1 – 15 to add more VeForms to this Guideline.
22. Click  to exit Maintain mode.

Configuring a VeForm Launchpad tab

To assist in the easy location and launch of VeForms, we recommend the creation of a VeForms Launchpad tab.

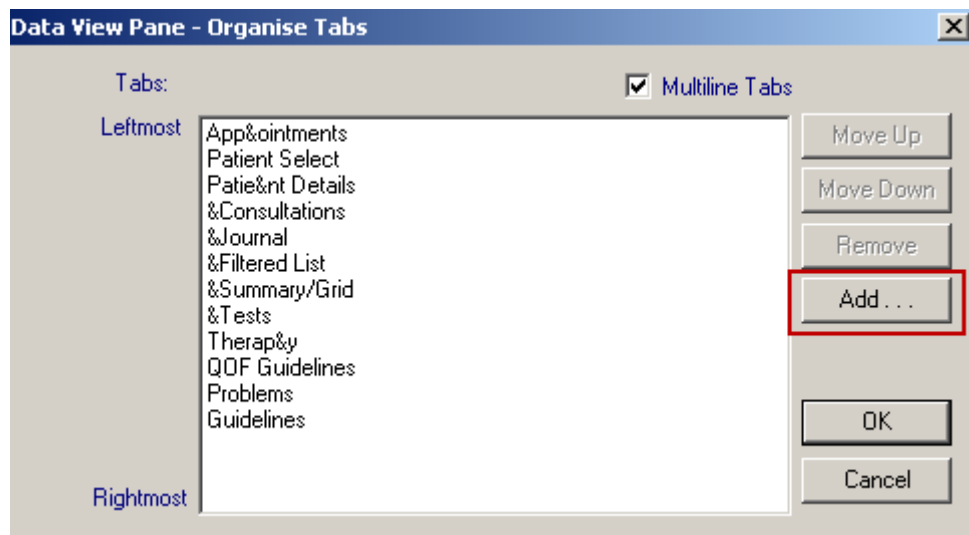
To configure a VeForm Launchpad tab within Consultation Manager:

1. From **Consultation Manager** with any patient selected, right click on the Journal tab.
2. Select **Organise Tabs....**



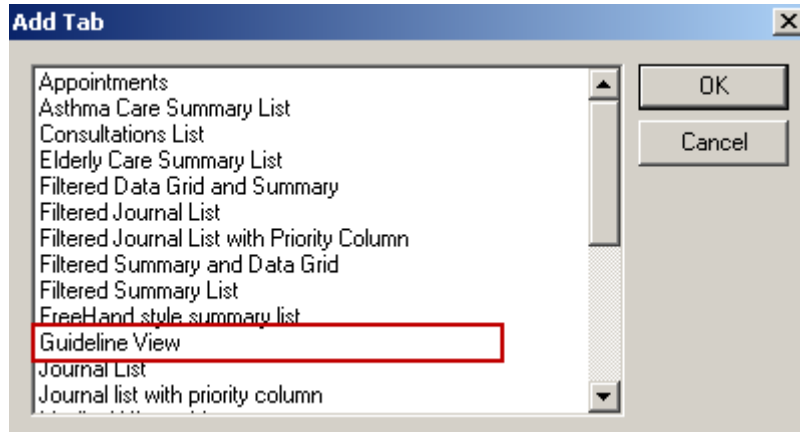
Consultation Manager - Right click – Organise Tabs

3. From **Data View Pane - Organise Tabs** click **Add....**



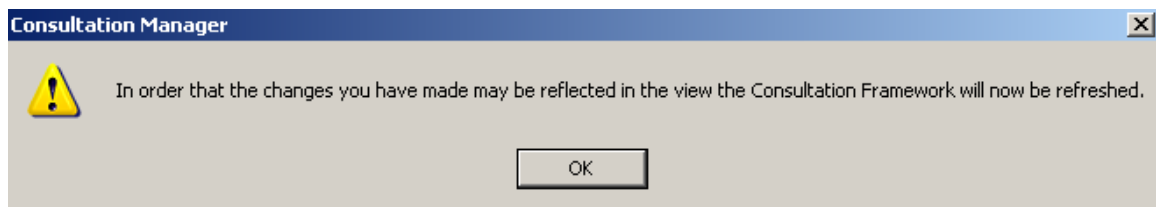
Data View Pane – Organise Tabs

4. From **Add Tab**, select **Guideline View** and select **OK**.



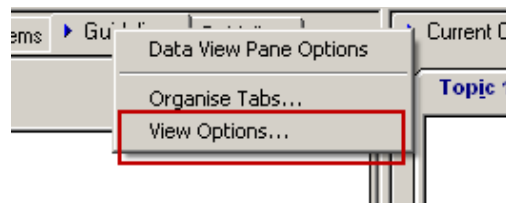
Add Tab with Guideline View highlighted

- When prompted with "In order that the changes you have made may be reflected in the view, the Consultation Framework will now be refreshed", click **OK**.



Refresh Consultation Framework Message

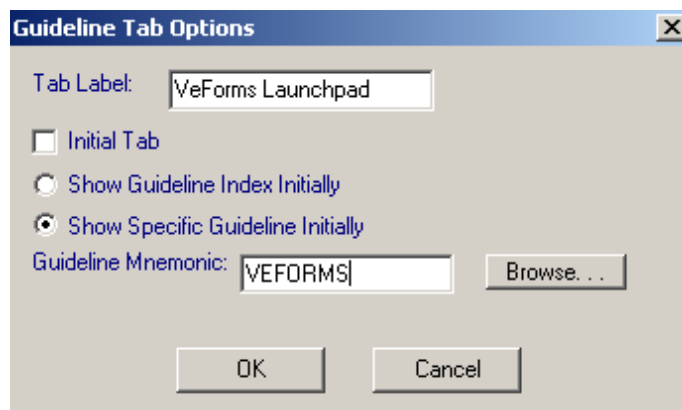
- You now have a new **Guidelines** tab on the far right of the menu. Right click the **Guideline** tab and select **View Options**.



Right click on the Guideline tab – View Options

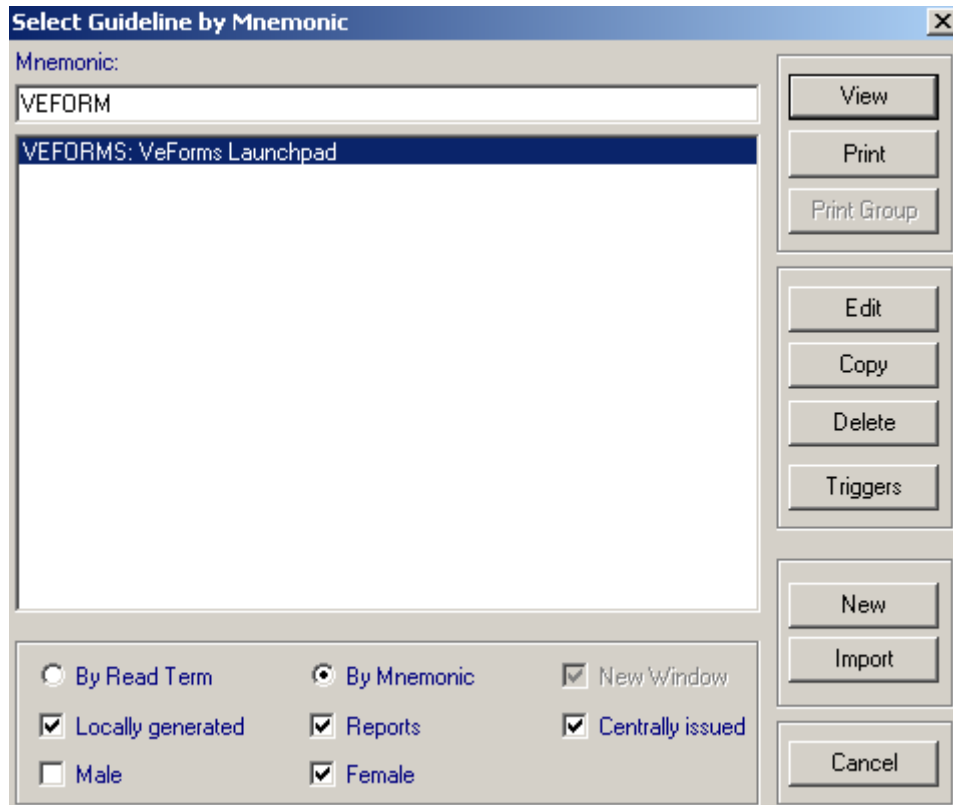
- From **Guideline Tab Options**:

- Type **VeForm Launchpad** in the Tab Label box.
- Select **Show Specific Guideline Initially**.
- Click on **Browse...**



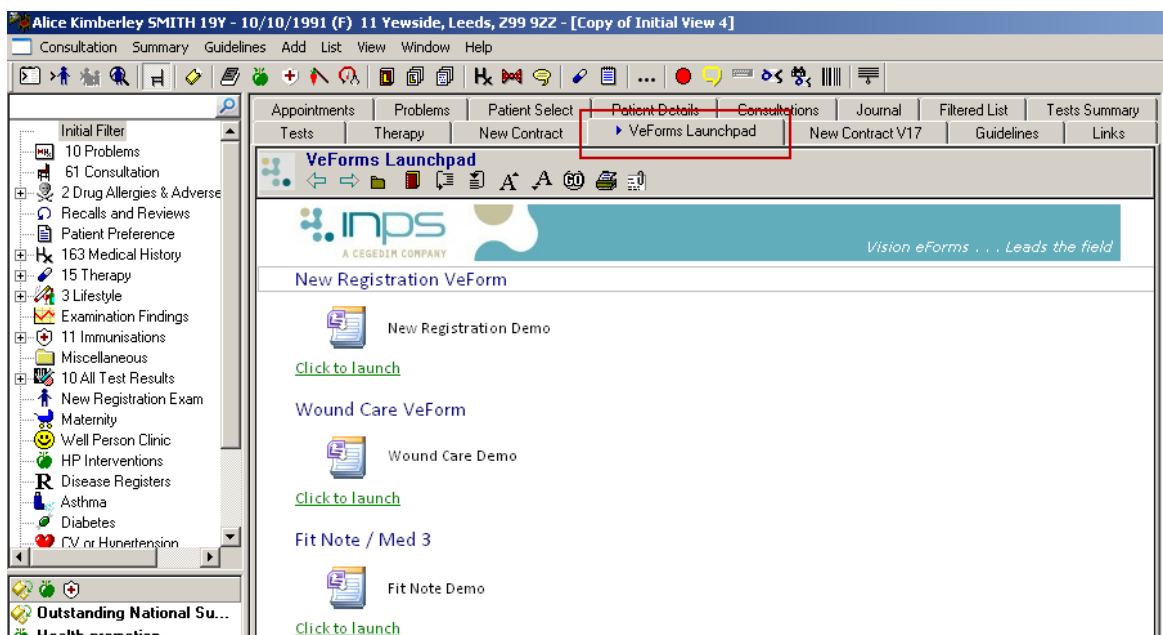
Guideline Tab Options

- From the **Select Guideline by Mnemonic** screen, type the word **VeForm** in the **Mnemonic** box and press return to find your **VeForm Launchpad** guideline. (See [How to Create a VeForm Launchpad Guideline](#) page 3.)



Select Guideline by Mnemonic - VEFORM

- Select **OK twice** to return to the Journal. When prompted with *"In order that the changes you have made may be reflected in the view, the Consultation Framework will now be refreshed"*, click **OK**.
- Once completed, a new **VeForm Launchpad** tab appears in the Data View Window.



An example VeForm Launchpad tab in Consultation Manager

Using VeForms

Adding Data

There are various ways in which data can be added to VeForms depending on the designs chosen:

- Check Boxes

Has the patient completed a full course of currently recommended vaccinations?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>
If no, has the patient been offered the recommended top up vaccinations?	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>
Is the patient included in the annual influenza programme?	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>

- Data Entry Fields

Cholesterol: <input type="text" value="4.5"/> (if indicated)

- Pick Lists

Urine Analysis: <input type="text" value="Potential Abnormal"/>	<input type="text"/>
Blood Glucose: <input type="text" value="Normal"/> (if indicated)	<input type="text"/>

Potential Abnormal

- Radio Buttons.

Smoking Status: <input checked="" type="radio"/> Smoker <input type="radio"/> Never Smoked <input type="radio"/> Ex Smoker	Alcohol Status: <input checked="" type="radio"/> Currently Drinks <input type="radio"/> Lifelong Teetotaler <input type="radio"/> Ex-Drinker
--	---

If the data being added is outside of the range that Vision will accept, an error message will be displayed.

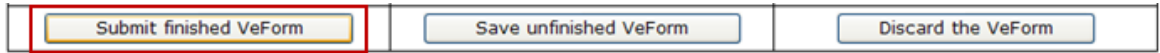


Example of invalid data error message

Click on **OK** to return to the VeForm and enter the correct value to continue.

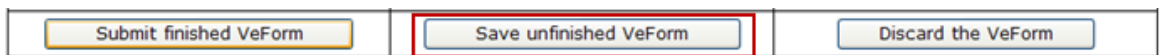
Saving VeForms

To save a VeForm, there will be a button at either the top or bottom of the form, depending on the design you have requested, that says either **Save** or **Submit**. This will automatically create a PDF attachment within Consultation Manager and write back all of the Read coded information recorded within the VeForm.



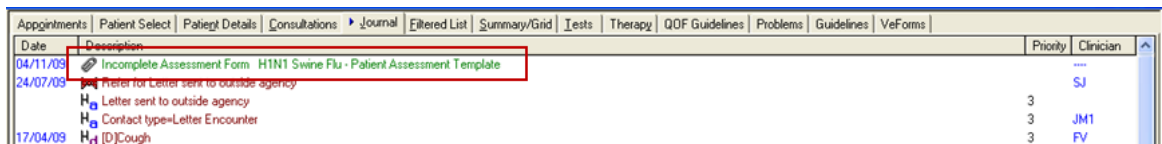
An example of a Submit button available on VeForms

If the document needs to be completed by another member of staff, the option **Save as Draft** or **Save unfinished** will be available. In this case the data will not be written back to Vision, this will only happen when the VeForm is finished.



An example of a Save unfinished button available on VeForms

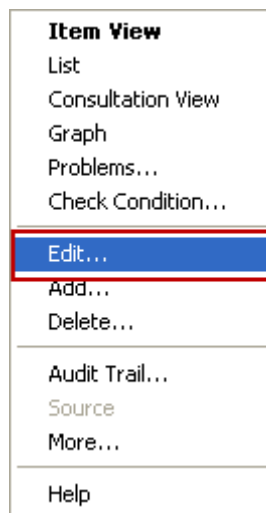
A VeForm saved, as a Draft will be prefixed on the journal as **Incomplete**.



Date	Description	Priority	Clinician
04/11/09	Incomplete Assessment Form H1N1 Swine Flu - Patient Assessment Template	---	---
24/07/09	Letter for Letter sent to outside agency	3	SJ
	H Letter sent to outside agency	3	JM1
	H Contact type=Letter Encounter	3	FV
17/04/09	H (D)Cough		

An example of an Incomplete VeForm in journal

If a draft has been saved, a member of staff can complete the VeForm by right clicking on the VeForm within Consultation Manager and selecting **Edit**.

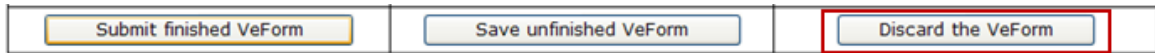


Right click menu with Edit highlighted

The VeForm can now be completed as required or again saved as a draft.

Remember - The data will not be written to Vision until the VeForm is completed.

The VeForm can have a **Discard** option for cancelling the form if completed in error. As data is not written to Consultation Manager until the form is saved or finished, no data entries will have been made into Vision.



An example of a Discard button available on VeForms

Retrieving Data Recorded Using VeForms

Read coded data is recorded in Consultation Manager, using the Structured Data Area (SDA) where appropriate. Data with no Read code is held within the PDF attachment created by VeForms, and can be viewed by right clicking on the item and selecting **Item View**.

Date	Description
17/06/09	Completed Assessment Form - AssessmentTemplate\MLEventsExample
	H _d Advice about treatment given Swine Flu (influenza A H1N1).
	H _d Other specified pneumonia or influenza confirmed case of Swine Flu (influenza A H1N1).
	H _S General symptom NOS
	H _S Loss of appetite - symptom
	H _S Nose running
	H _S Sneezing symptoms
	H _d [D]Chills with fever
	H _S Aching muscles
	H _S Tiredness symptom
	H _S Sore throat symptom
	H _S C/O - a headache
	H _S Shortness of breath
	H _S Cough
	H _S Feels hot/feverish
	Nasal swab taken
	Throat swab taken
	BP 130 / 90 taken. Sitting. Cuff: Standard. O/E - blood pressure reading
	O/E - pulse rate = 98 beats/min
	O/E - temperature level = 60 degC
	H _d Other viral disease contact with Swine Flu (influenza A H1N1).
	H _S Recent foreign travel to: Mexico


Ve-Form Saved as a PDF Attachment within Consultation Manager

Consultation Manager – Journal view showing a saved VeForm

Note – If data is edited through the patient record as opposed to the VeForm, the VeForm is not updated.

Appendix 1

This shows an example of a simple VeForm.

Wound Assessment VeForm			
Patient Information		DOB	Sex
, ()		NHS	Age Years
Registered Address		Contact Details	
		Home	
		Mobile	
		Work	
		Email	
v1.0			
Consultation Type			
<input checked="" type="radio"/> New Wound Assessment		<input type="text" value="Length of time present"/>	
<input type="radio"/> Reassessment			
<input type="radio"/> Dressing Change		<input type="text" value="Date of last dressing"/>	
Assessment Details (New wounds and Re-assessments Only)			
Referred by: <input type="text" value="Select..."/>			
Patient has given consent to photograph wound? <input type="checkbox"/>			
Photograph of wound taken? <input type="checkbox"/>			
Existing Drug Allergies <input type="text" value="%fs"/>			
Existing Factors Affecting Healing (New wounds only)			
Does the patient currently suffer from Diabetes? <input type="checkbox"/>			
New Blood Pressure <input type="text"/> <input type="text"/>		Last Blood Pressure Readings <input type="text" value="%fs"/>	
If result is outside normal parameters make sure BP is being monitored		<input type="text"/>	
Last Height <input ",heightcm"="" (metres)="" height="" type="text" value="eventdate, "/>		Last Weight <input ",weightkg"="" (kg)="" type="text" value="eventdate, " weight=""/>	
<input type="text"/> <input type="text"/>		<input type="text"/> <input type="text"/>	
Height <input type="text"/> Metres		Waist Circumference <input type="text"/> cm	
Weight <input type="text"/> KG			

An example of a simple VeForm

