

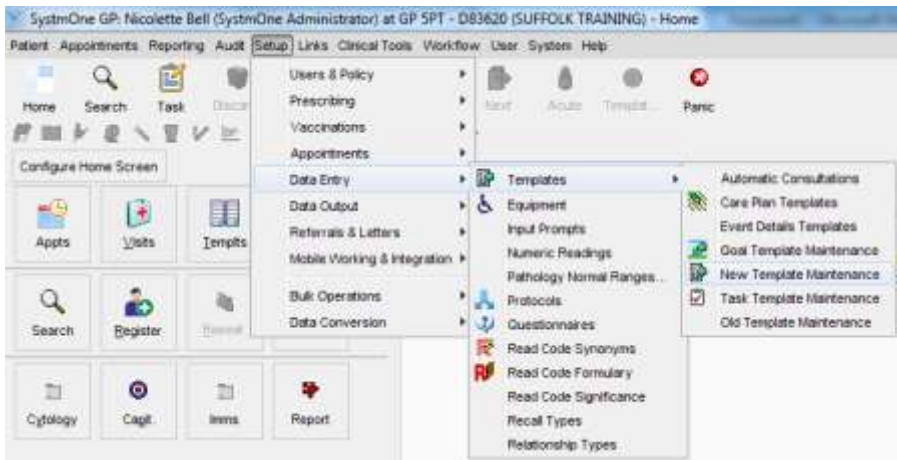
How to amend your main Template to show the CMAS template

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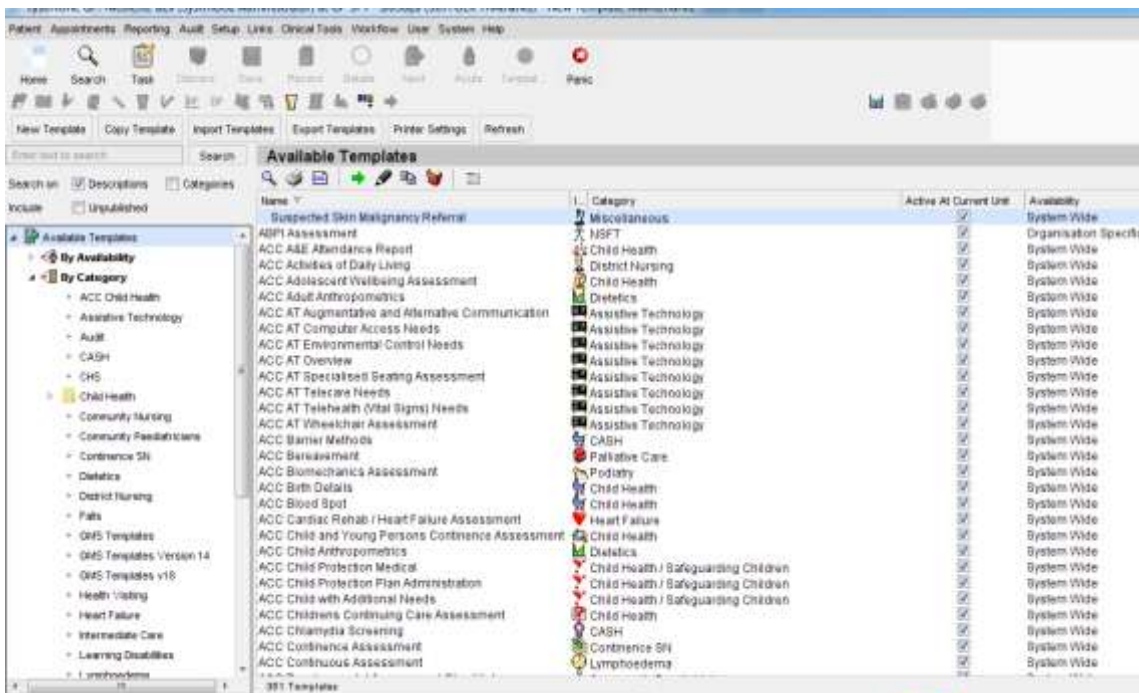
How to Amend a Quick Action Button with a CMAS Template

- a. Please go to Setup > Templates > New Template Maintenance:



- b. This shall then take you to the New Templates Maintenance screen in SystemOne, which shows all of the Templates you have available to your Practice.

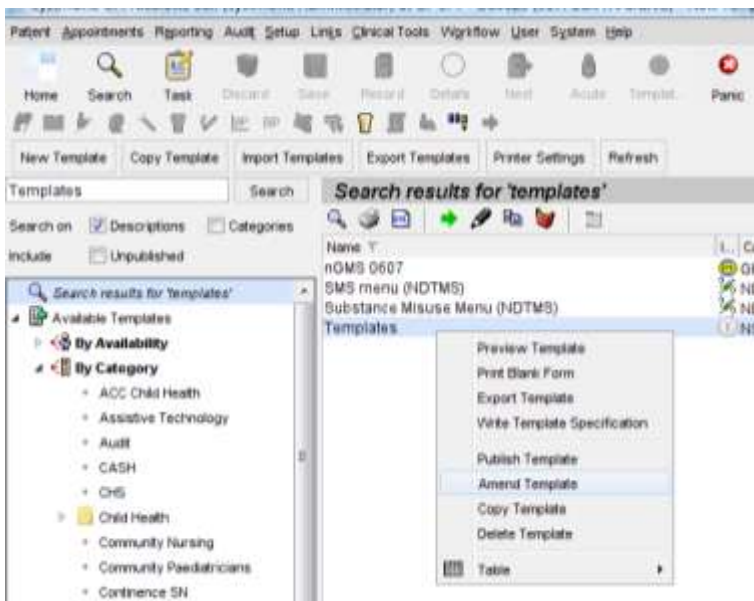
The left hand side shows the Categories (folders) of where your Templates are shown; and the right hand side shows the Available Templates:



c. Within the Search bar you shall need to search for the Templates template:



d. You will need to Right click on the 'Templates' template and select 'Amend Template':



- e. This shall then take you to the 'Amend Template: Templates' dialog box; and put you within the 'Details' tab. The Details tab is where you provide details regarding the Template you are creating/amending:

The screenshot shows the 'Amend Template: Templates' dialog box with the 'Details' tab selected. The form contains the following fields and options:

- Buttons: Preview, OK, Cancel
- Template name: Templates
- Category: NSFT (dropdown), with a 'New Category' button
- Sub category: (empty dropdown), with a 'New Sub-category' button
- Icon: (dropdown menu)
- Description: Template of Templates
- Current Version: 2
- Availability: Organisation Specific
- Rules:
 - Applies to male patients
 - Applies to female patients
 - Minimum age
 - Maximum age
- Link to Problems with codes: A red 'R' icon and a text box containing 'Nothing selected'.

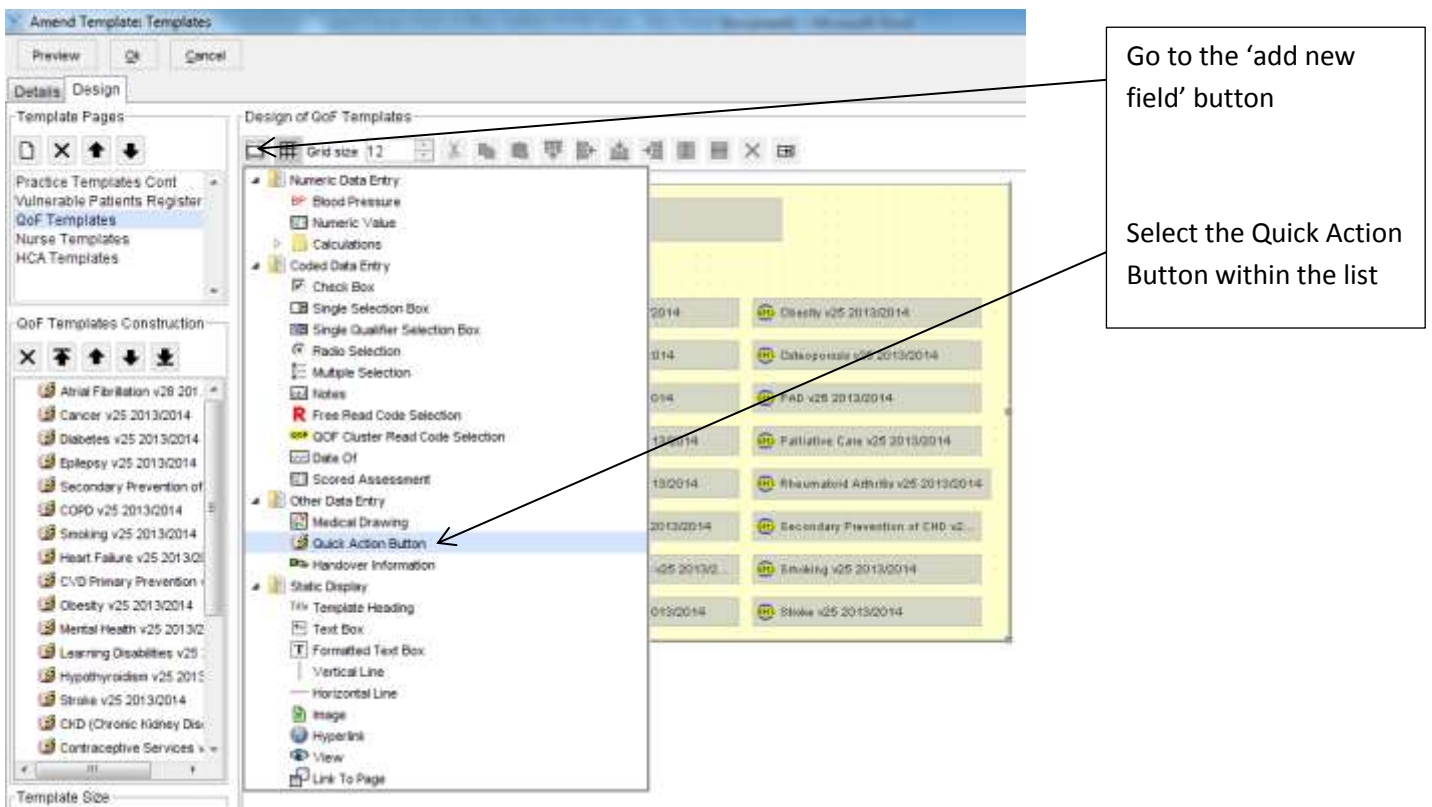
- f. On the 'Design' tab, you can see on the top right hand side there are Template Pages within the overall Template; you can create new or amend the Template Pages that are within the 'Templates' template:

The screenshot shows the 'Amend Template: Templates' dialog box with the 'Design' tab selected. The 'Design of OPMisc' area displays a grid of template pages. On the left, there are two lists: 'Template Pages' and 'OPMisc: Construction'. The 'Design of OPMisc' area contains a grid of template pages, each with an icon and a title. The titles include:

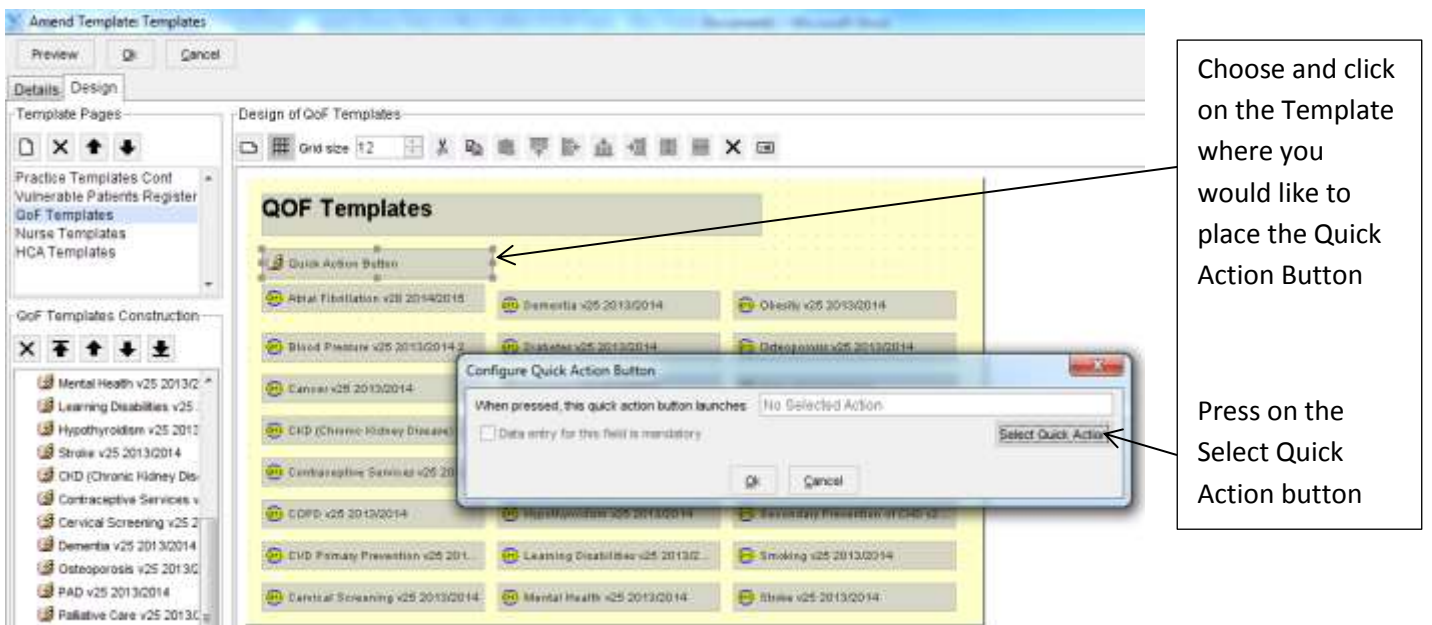
- Blood Sample REQUESTES
- Epworth sleepiness scale
- Mental Health Physical Annual R...
- BP and ADPM
- Falls
- Minor Surgery (LEI)
- Breast Examination
- Examination findings
- History/Residential Home Review
- Child 5-8 Week Exam
- HIV Medical
- Palliative Care & Marital Aid
- CVA/TIA assessment
- Learning difficulties health sheet
- PHQ-9/10 score
- Depression diagnosis template
- MDT meeting
- Post Natal Check
- DPLM
- MDD - Statement of Fitness to W...
- Podiatric assessment
- DVT referral
- Memory assessment
- DSS (Suspected DVT 2)

- a. To add the CMAS Template; go to the 'add new field' button and selecting the Quick Action Button within the list:

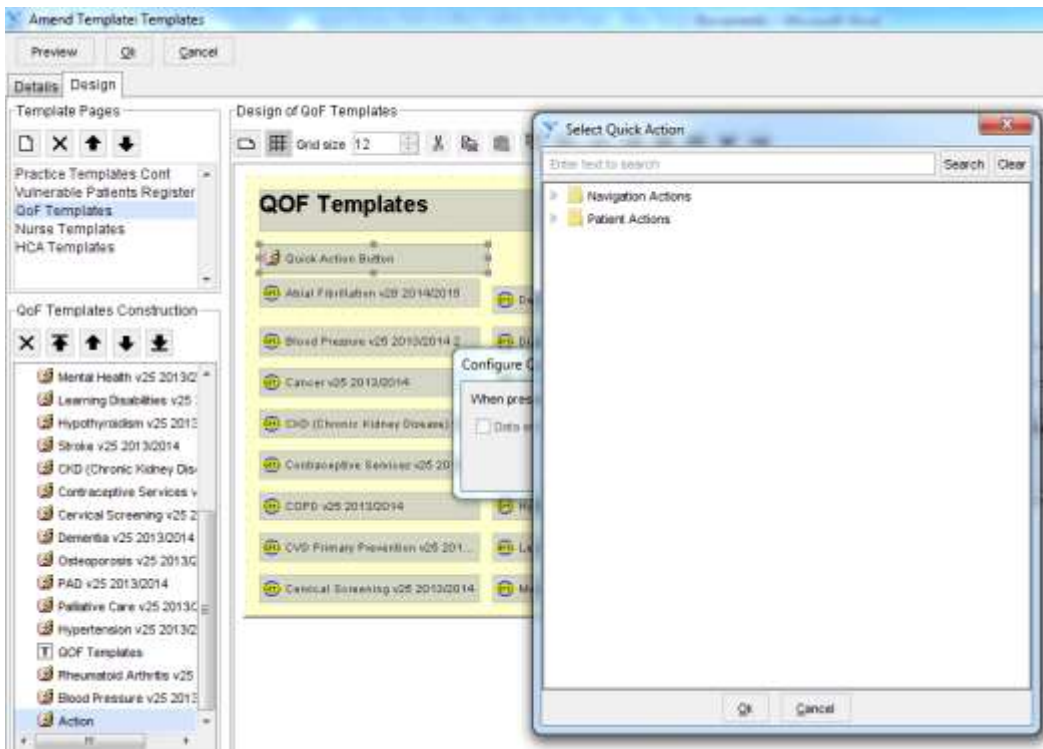
PLEASE NOTE: If this is not the case then please skip to instruction 'How to Preview the whole Template with all of the QOF templates updated or manually inputted'.



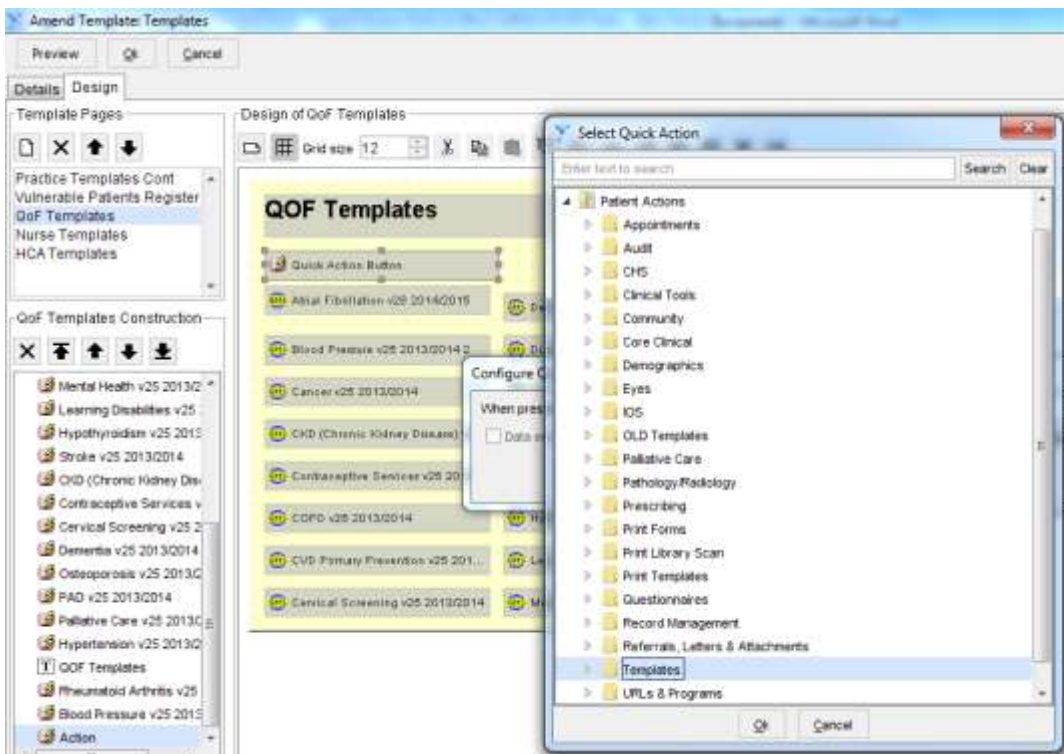
- b. Choose and click on the Template where you would like to place the Quick Action Button, and then a Configure Quick Action Button dialog box shall appear, which you then need to press on the Select Quick Action button:



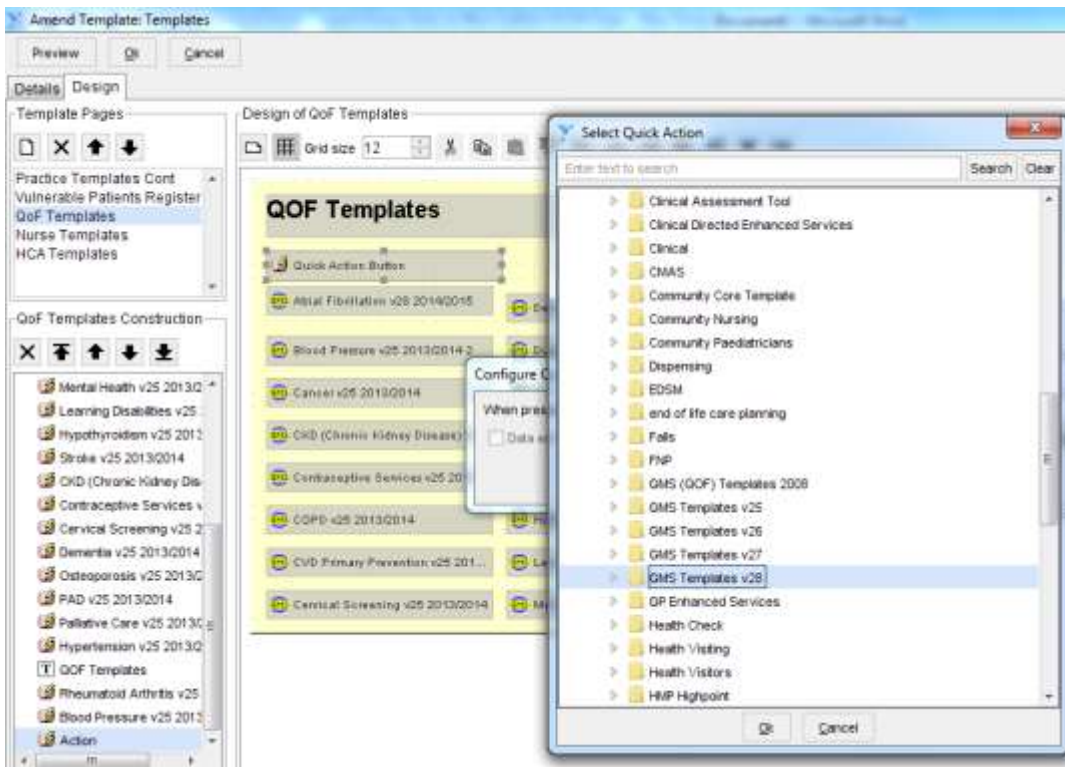
- c. The Select Quick Action dialog box shall appear, and you shall then need to navigate to where the appropriate QoF Template is held:



d. To navigate to the Templates, expand the Patient Actions folder and find the Templates folder:



e. Expand the Templates folder and scroll down to find the CMAS template



- f. Expand the CMAS Templates folder and then select the CMAS template that you would like, and press OK:
- g. Again, this shall then show you the QOF template that you had selected, and again, press Ok:
- h. You shall then see that in the Design of the CMAS Templates, you have manually added a Quick Action Button to view the CMAS template that you had selected: