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**NECS Clinical Systems Specialist Team**

# EMIS Web - Data Entry Template Mini Guide

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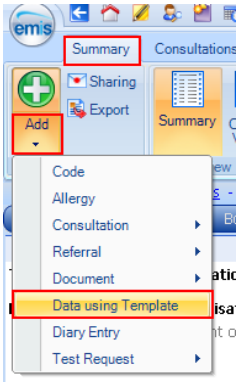
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## Accessing Data Entry Templates

Data Entry Templates can be accessed from all areas of the Patient Record other than Medication.

1. From **Summary** click add drop down arrow and select **Data using Template**

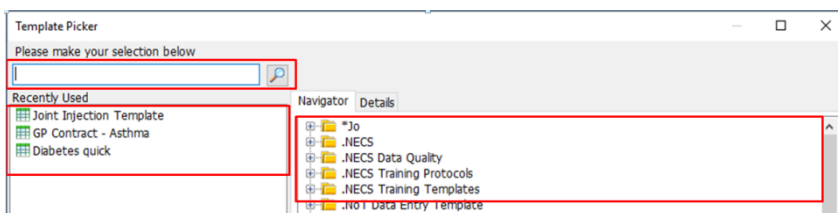


Or

2. Once a **Consultation** has been started, click **Run Template** button

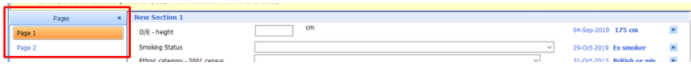


3. The **Template Picker** dialogue box will display. The left pane shows any previously used templates. The right pane allows you to navigate through all folders to find the appropriate template. The top box allows you to search for the name of a template. **Double Click** the template once located to open it

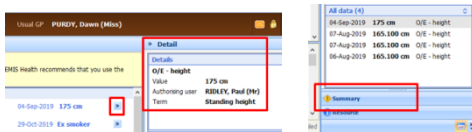


## Data Entry Templates Layout

1. The Template may have multiple pages. Click on **pages** to display on right hand side



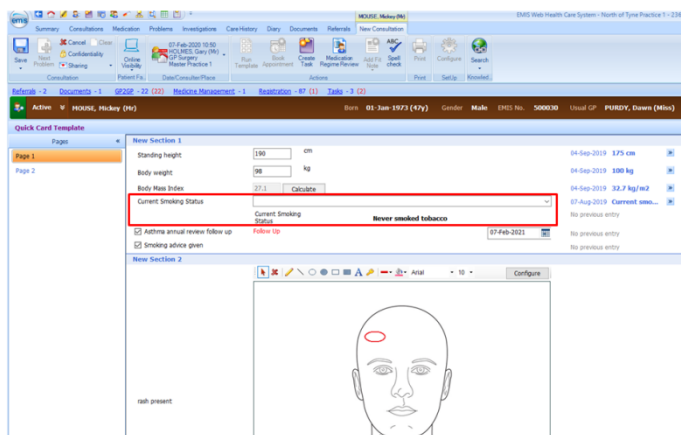
2. Click **double arrow icon** to view historic information for each item. This is displayed on right hand side of the screen. Click **Summary** to view the summary information again



## Completing a Data Entry Template

There can be many items on a template, common examples of which are shown below. Each item may allow you to enter free text, enter a date, be ticked by default or be a mandatory item that must be completed.


- a. Values – numeric data e.g. Height, Weight.
- b. Calculate – click to automatically calculate e.g. BMI
- c. Picking List – choose from a list e.g. smoking status.  
**Note:** some items allow you to choose more than once, so may show the prompt again as highlighted below.
- d. Follow-up – click and enter a diary entry date for the next follow up for this item e.g. Asthma annual review
- e. Tick box – tick the box if appropriate e.g. smoking advice given
- f. Annotate – medical drawing that can be annotated using pencil / shapes / text



1. Click **Save Template** to save the information once completed. Click **Cancel** or **Cancel Template** to close the template without saving the information

**Note:** if you ran the template from an open consultation **Save** the consultation also once complete.

## Amending a Template Entry

1. From the Consultation section within the selected patient, select the consultation to edit.
2. Click **Edit Consultation** on toolbar or right click and select **Edit consultation**
3. Click the down arrow on **Run Template** button and ensure you select the same template used to enter the data originally A small icon of a "Run Template" button. It is a light blue square with a white border, containing a grid of small icons and the text "Run Template" below it. A red rectangular box highlights the bottom portion of the button.
4. Amend / Delete information in the template as appropriate. Click **Save Template** to save changes and **Save** the consultation