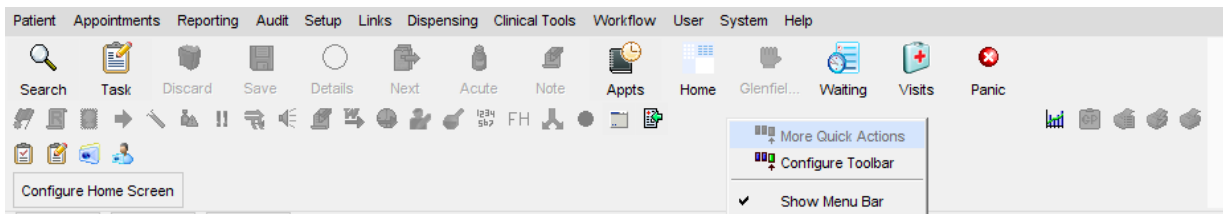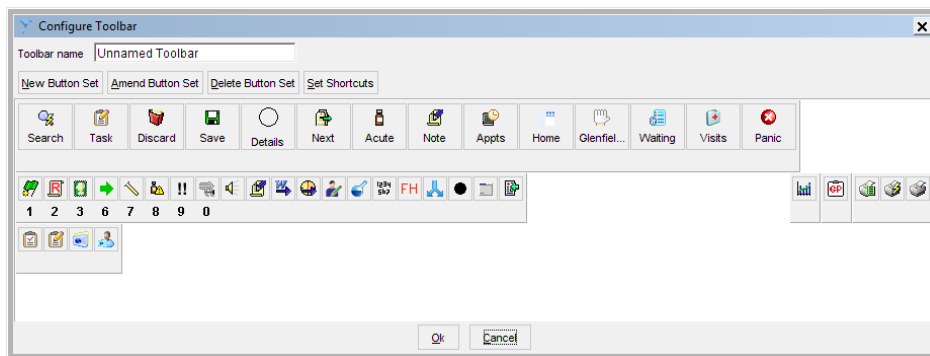## How to add the "GENVASC" Template
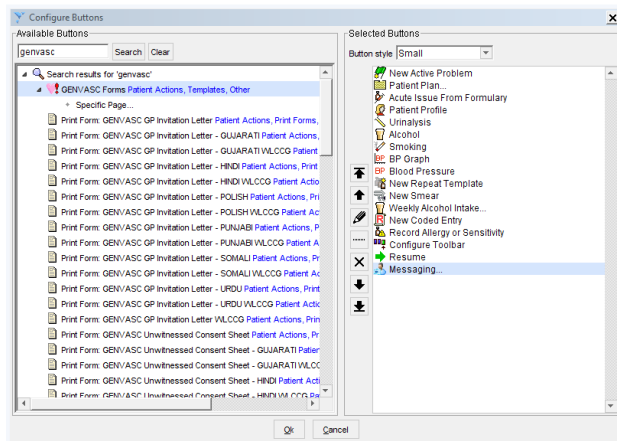
To add a template to your toolbar:

1)   Right-click anywhere on your toolbar. Left-click on **Configure Tool Bar**.

2) The below pop-up box will appear. Double Left-click the toolbar you would like to add the button to.

3) Another pop-up box will appear. Type the words **GENVASC** into the search box in the top left-hand corner and click **Search**.

4) The **GENVASC** template will appear. To add the template to your toolbar, you must double-click on it. It will then appear selected on the right-hand side of your screen. It is now added to your toolbar.

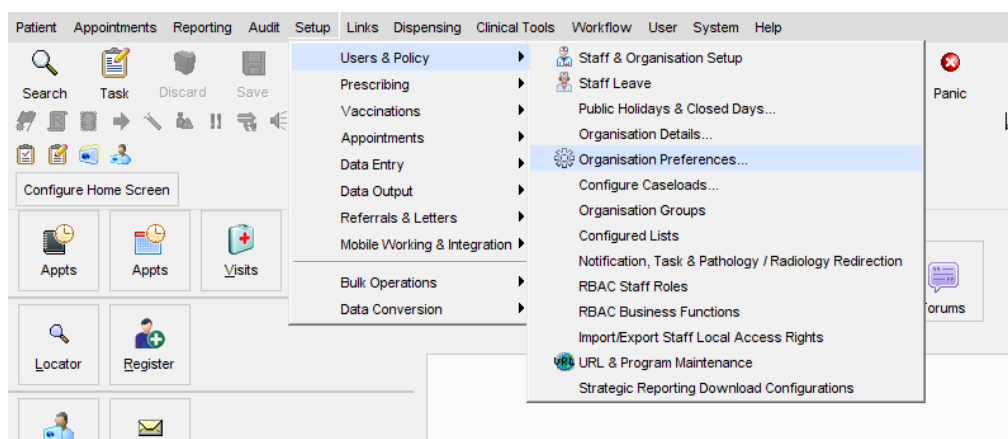5) Click **Ok** and then **Ok** again. The template will now be available to use on your toolbar.

It is advisable at this point to shut down and restart SystmOne correctly (Using F11 + selecting shutdown) to ensure your new settings are saved.

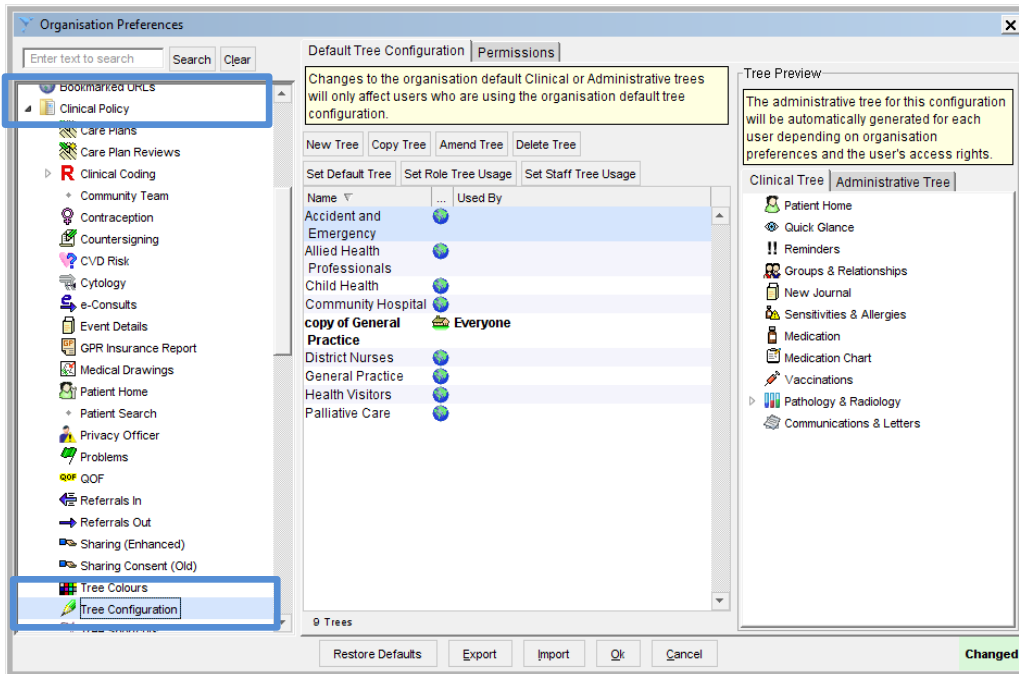## To add a template to your clinical tree:

NOTE: This option can only be performed by users with System Administrator access rights.

NOTE: If any users cannot see the template on the clinical tree after performing the steps below then individual clinical trees are set. If this is the case then each user must add the template to their tree individually.
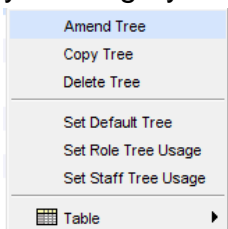
6) Left-click on **Setup**, then **Users & Policy** and then **Organisation Preferences**.

7) Left-click on the [   ] next to the Clinical Policy folder.

8) Left-click on **Tree Configuration**. Left-click on the clinical tree which relates to your surgery and then left-click **Amend Tree**

.

9) A similar pop-up box to the one shown in Step 3 will appear. Perform steps 3-5 as shown above to add the required template to your clinical tree.

10) By default, the new template will appear at the bottom of your clinical tree. If you wish to change their position, use the up (⬆) arrow to move your template up one space and the down arrow (⬇) to move your template down one space. Use the ❌ to delete any template that have been added incorrectly.
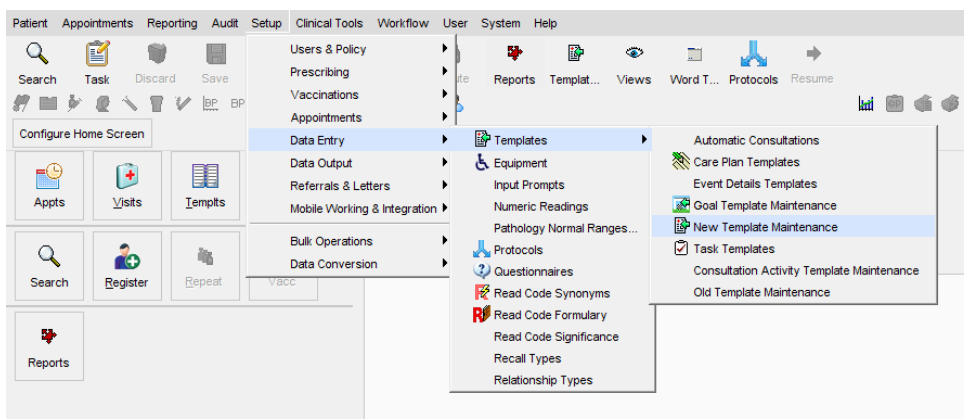
11) Once you have added the template that you require, left-click **Ok**. It will now be available to use in your clinical tree when a patient record is open.
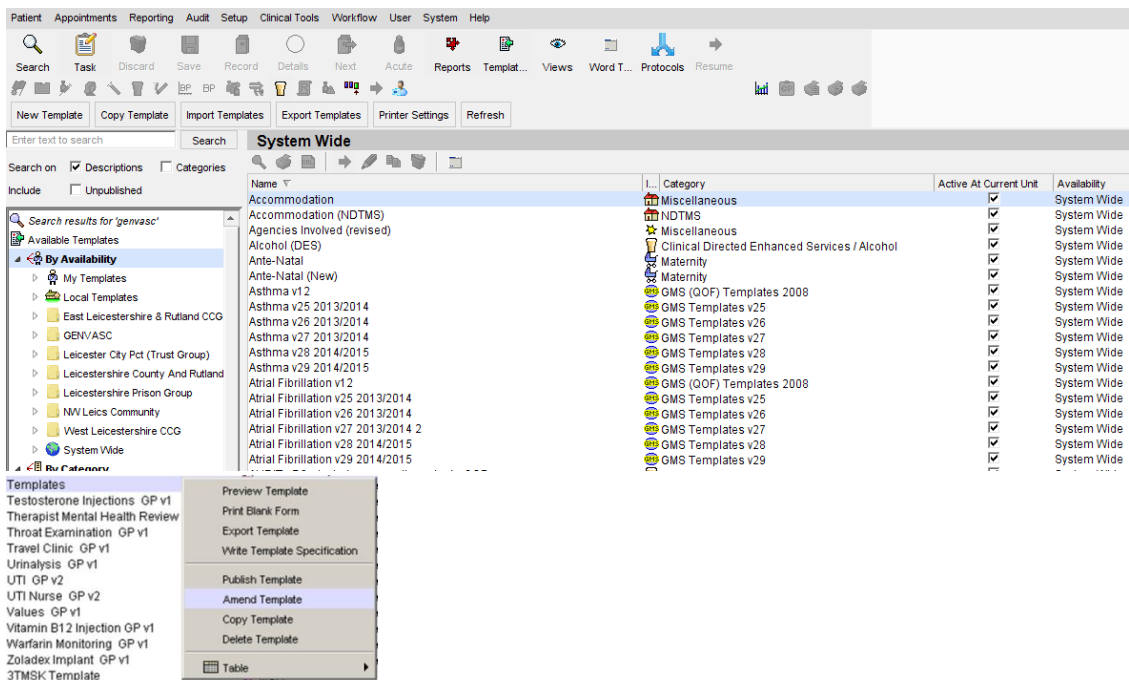
To add a template to another template:

This will show you how to add shortcut buttons in existing clinical templates which will link to the GENVASC template. For this example we will show you how to add buttons to the "Templates" template, but any template will work just as well.
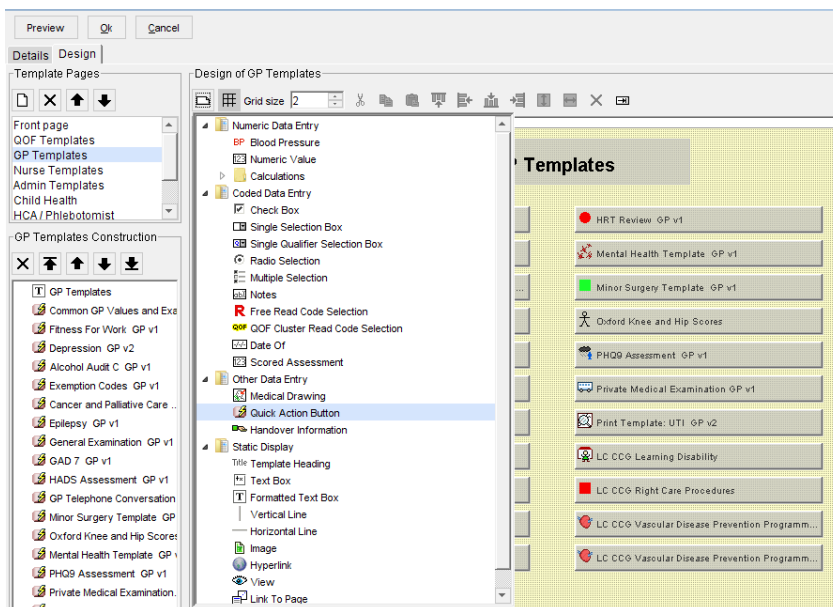
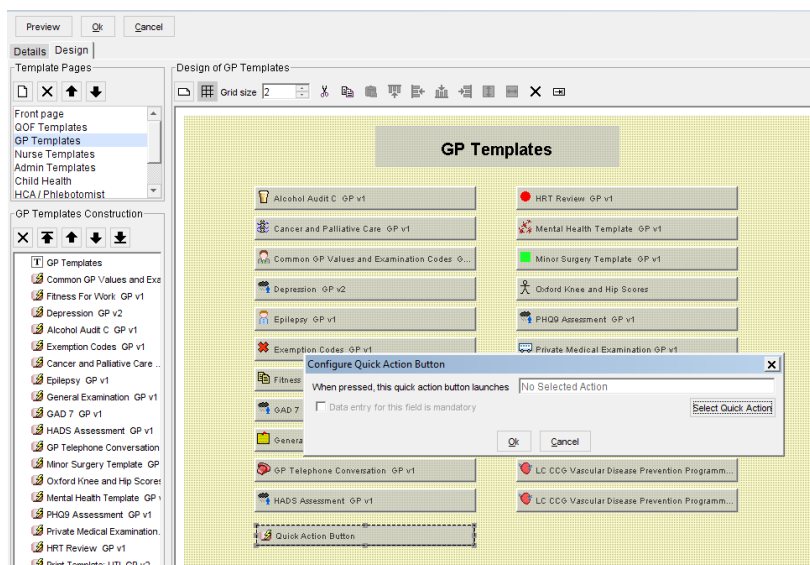12) Left-click on **Setup**, then **Data Entry** and then **New Template Maintenance**.

13) The New Template Maintenance screen will appear. Find the template that you would like to amend, then right-click and choose **Amend Template**. (If it asks if you are sure. Left-click **Yes**.)
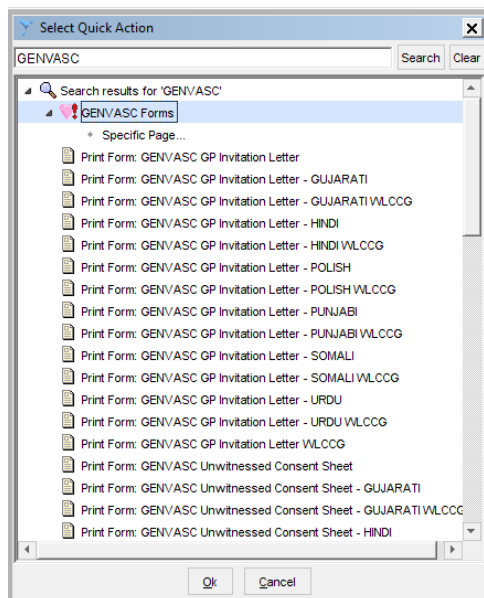
14) Left-click on the white (landscape) piece of paper near the top of the page. Then left-click on the **Quick Action Button** option.

15) Using your mouse, left- click where you would like the button to go. A pop-up box will appear once you have finished. Left-click on **Select Quick Action**.

16) The Quick Action box will appear. Type **GENVASC** (or part of this title) into the search box and left-click **Search**.

17). Left-click on the **GENVASC** template to highlight it in blue, then left-click **Ok** and **Ok** again.

18) Once the template has been added and you have resized the buttons if necessary by clicking and dragging to size, left-click **Ok** in the top left-hand corner. Your changes have now been saved and your updated template is ready to use in a patient record.

For further help please contact the Leicestershire Health Informatics Service desk on 0116 295 3500.