Pan London Suspected Cancer Referral Forms for GPs

A step-by-step guide to installing, using and emailing the forms for GPs using EMIS Web

Dr Ian Rubenstein
Eagle House Surgery
Ponders End
Enfield

Table of Contents

Introduction

The new Pan London suspected cancer forms are designed to make it as easy as possible to refer patients with the minimum of effort.

The forms are provided as **EMIS Web Document Templates** (files with the extension **.ewdt**).

They contain special codes which interface with EMIS Web.

Opening a template as a document within a patient's EMIS Web medical record will generate a referral form, pre-populated with patient and practice details. GPs respond to questions in the clinical section of the form, typically by checking boxes or entering a minimum amount of text.

The new forms will also automatically include relevant laboratory or imaging results stored in patients' medical records.

Before the templates can be used to generate referral forms, they **must be installed into EMIS Web** as EMIS web document templates. **You cannot open them directly into Microsoft Word.**

This booklet explains how to correctly install the EMIS Web document templates so they can be used to generate suspected cancer referral forms.

It also explains how to produce forms during consultations with patients and how completed forms can be sent to hospital trusts.

Downloading the document templates

In order to install the templates into EMIS Web, you will need to download a compressed (ZIP) file containing the form templates onto one of the computers in your surgery.

The ZIP file is available from the **Pan London Suspected Cancer Forms download site** here.

You can place this file anywhere on your computer. Once it has been used to install the templates onto your EMIS Web system, it can be safely deleted. It is simplest to download it straight onto your Windows desktop (see picture, below).

Pan London Suspected Cancer Forms for EMIS Web.zip

Double-click on the ZIP file
In order to open it
(see picture, right).
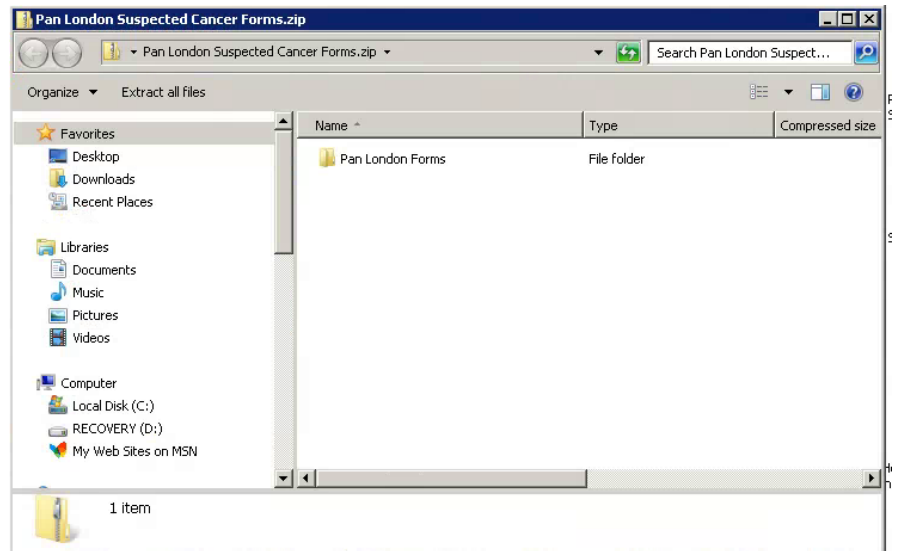
Select the folder named **Pan London Forms**, right-click on the folder and select menu item **Copy**.

Next, right-click on your Windows desktop and choose menu item **Paste**.

The folder should be visible on your windows desktop (see picture, below) and you can now safely delete the ZIP file.

Double-click the folder icon to reveal its contents (see picture, below).
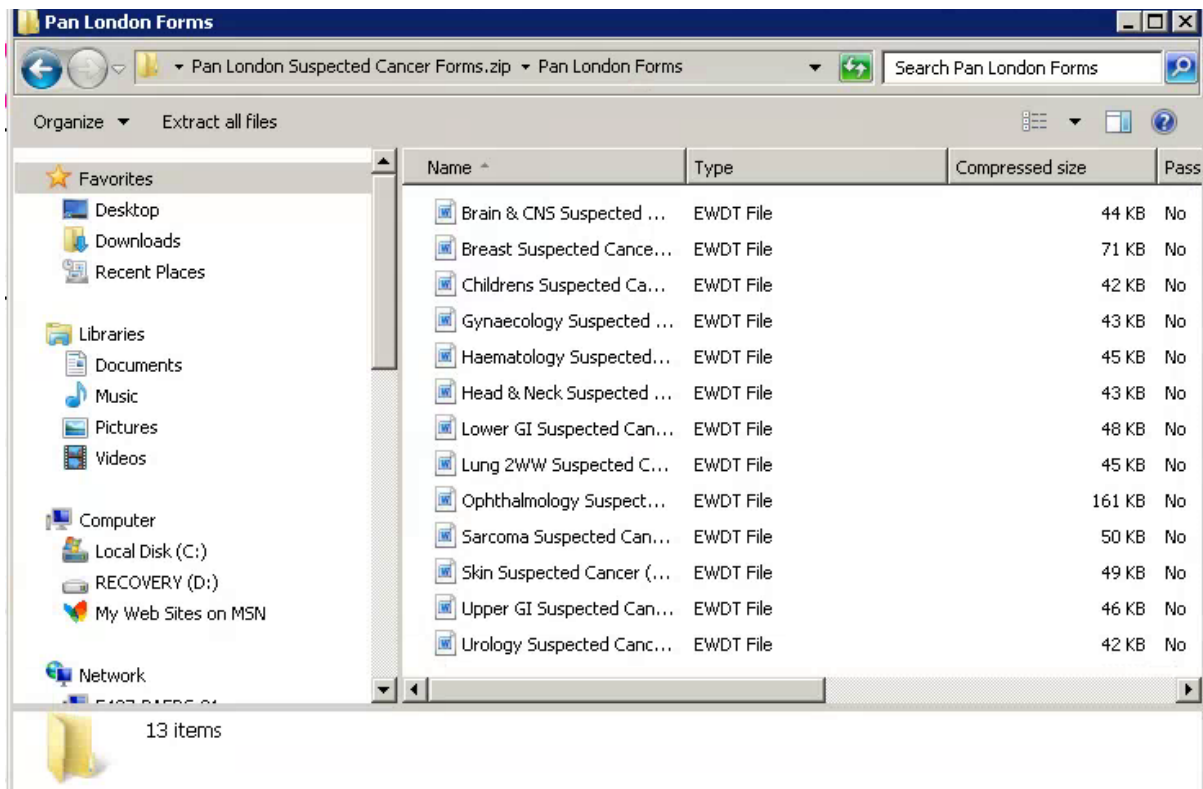
There are currently 13 different document templates that are used for suspected cancer referrals to various specialties.

Although these templates generate Microsoft Word documents when opened up from within EMIS Web, they have to be **installed into EMIS Web first**.

<p style="text-align:center"><u>IMPORTANT NOTE</u></p>

These document templates cannot be opened in Microsoft Word directly.

If you attempt to open a template by clicking on it from your Windows desktop you might receive an error message informing you that Windows cannot open the file.

If you then attempt to proceed and open the file using Microsoft Word you will see the following window.
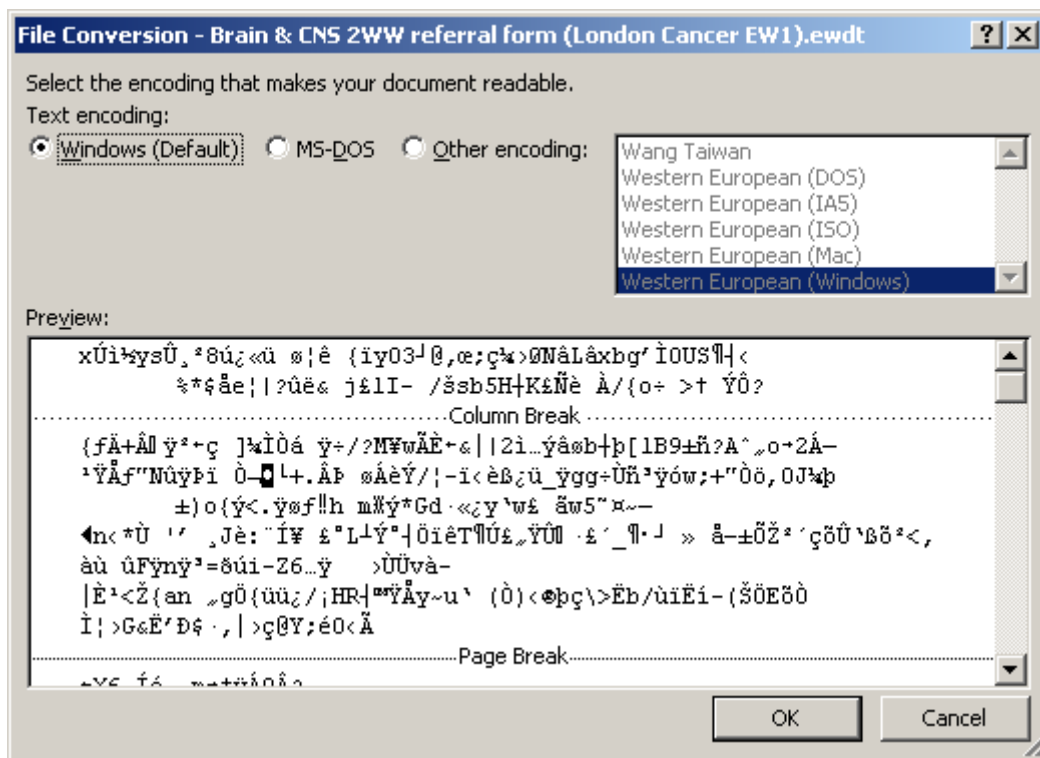
If you see this window, please close it and follow the instructions below.

The next section explains how to correctly install the templates so they can be used to generate referral forms.

Installing the forms

Make sure you have the correct EMIS Web permissions to do this.

You will have been assigned an EMIS Web **Role Based Access Control (RBAC) number**.

This allocates the roles you are allowed when using EMIS Web. You must have the correct **RBAC number** to be able to install document templates.

For example, a GP who wished to do this must be assigned *Higher Level GP Status*. You can see what status you have been assigned by looking at the bottom left hand corner of your EMIS Web screen (see picture, below).
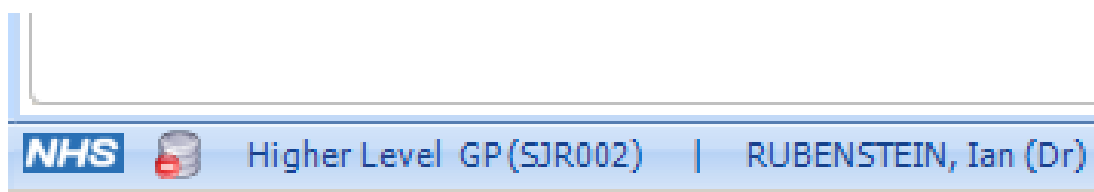
Without the correct RBAC number, the menu options required to install the templates will not be available to you.

You will need to consult your practice manager or data controller if you find you are not presented with the menu options described below.

You also should have downloaded the ZIP file containing the EMIS Web Document Templates onto your computer (see ***Downloading the document templates***, above).

The following discussion assumes you have downloaded the ZIP file and have successfully copied the folder it contains onto your Windows desktop.

You only need to do this on **one** computer in your surgery. Once the document templates have been installed into EMIS Web, they will be available to all users on your network.


Next, follow these steps…

1. Place your mouse cursor over the **EMIS Ball menu**, located in the top left-hand corner of your EMIS Web screen
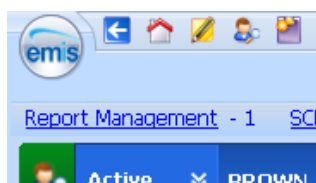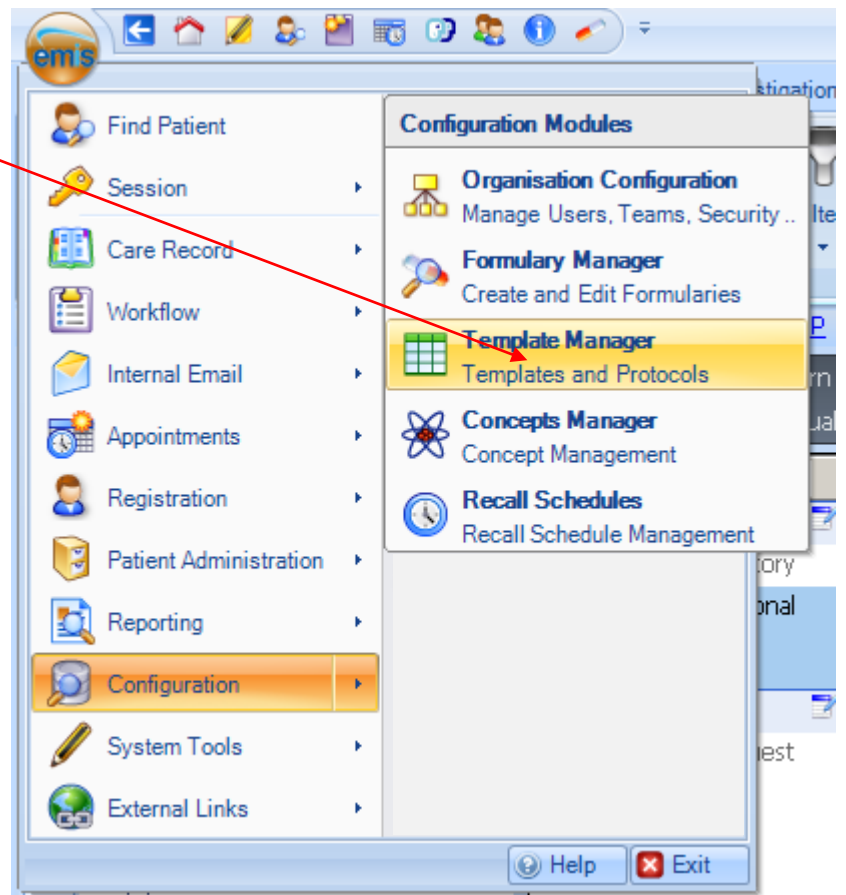
2. Click on the **EMIS Ball menu** to display the drop-down menu. Place your mouse cursor over the **Configuration** menu item but *do not click the mouse yet*.
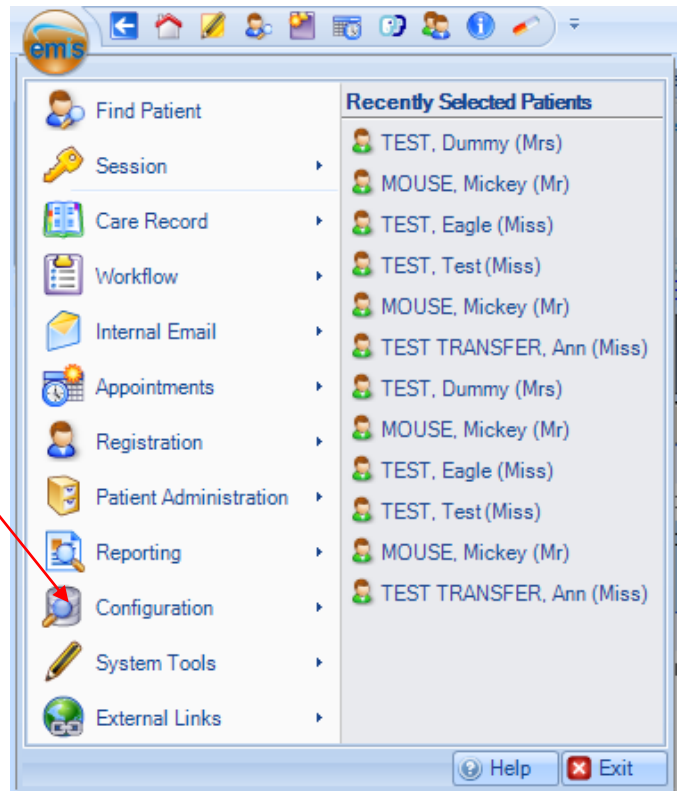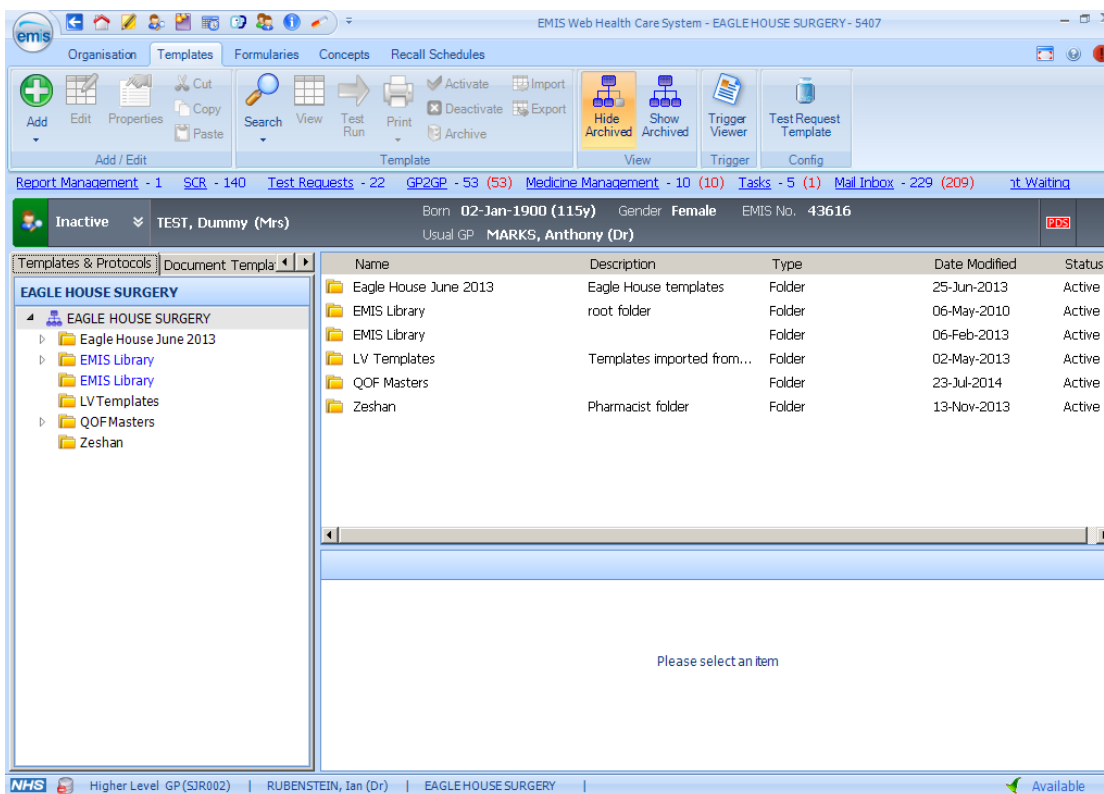

3. The **Configuration** menu option will automatically expand after a second or so (see picture, right).
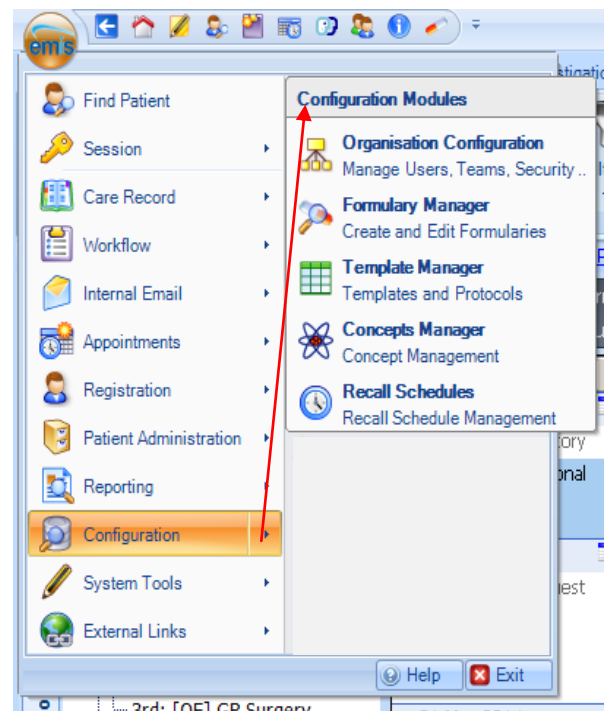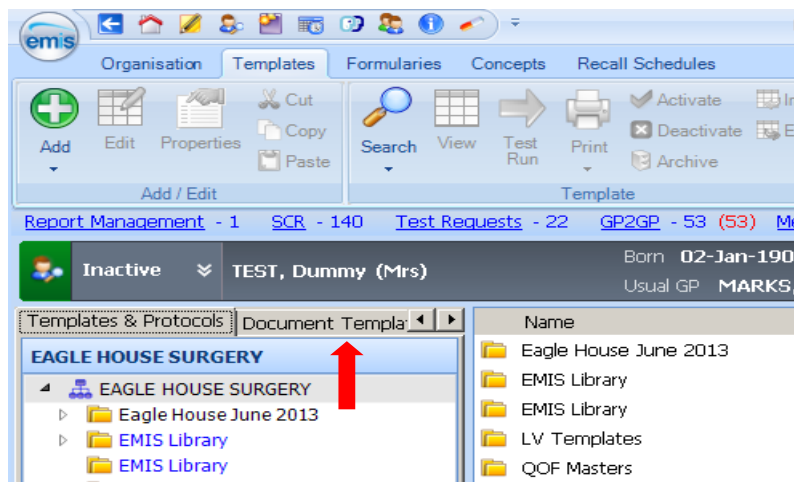
4. Place the mouse cursor over the **Template Manager** menu item.

5. Now click on the **Template Manager** menu item with the left mouse button. You will be presented with a screen similar to that shown below:

6. Observe the panel which occupies the left hand side of the screen (see picture, below).

The panel contains two tabs: **Templates & Protocols** and **Document Templates**.

Sometimes the name of the first panel can vary, so the **Templates & Protocols** tab might be replaced by one which says **Library Items**. This doesn't matter because we are only interested in the **Document Templates** tab.

Click on the tab labelled **Document Templates** (see picture, above: the Document Template tab is indicated by the red arrow).

7. You should see a list of the EMIS Web document folders used to store letters (see picture, right).

Notice the top-most level of the list is the **surgery name**. It is highlighted in blue which means none of the folders below it have been selected.

Also note the small arrows to the left of some of the folders. They indicate there are sub-folders contained within these folders.

If you left-click with your mouse on a small arrow, the folder next to it will expand to reveal its subfolders.

However, it won't display any document templates which may also be contained in the folder. These are displayed in a separate panel to the right of this screen. This is discussed in more detail below.
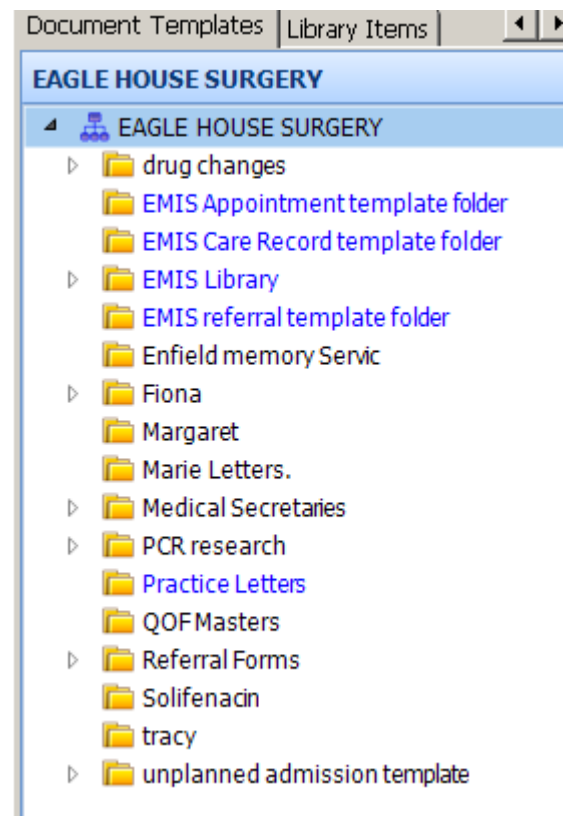
8. When you select a folder using the mouse, any document templates or sub-folders contained in that folder are shown in the large panel to the right.

In the picture below, the folder labelled **Pan London Forms**, which itself is a sub-folder of a folder labelled **Referral Forms**, contains the Pan London Suspected Cancer **document templates**. These are shown listed in the panel to the right of the folder list.
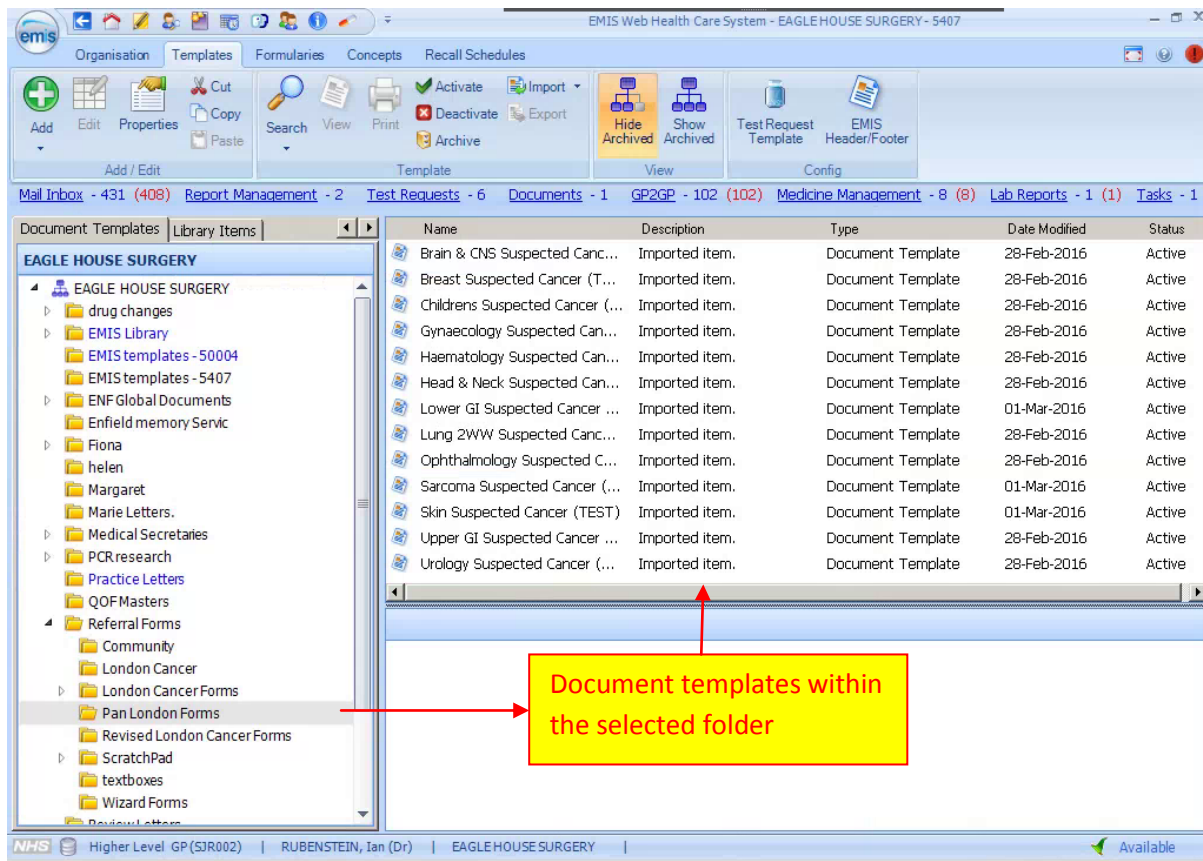

The following discussion explains how to import the files from the folder you downloaded from the Pan London Suspected Cancer referral forms website into EMIS Web.

9. In order to **import** the form document templates into EMIS Web as shown above, **you first need to select one of the EMIS Web document template folders on your system**. This folder will be used to contain the form document templates.

If you don't select an EMIS Web document template folder, you are not given the option to import files.

In the example below, the button on the **menu ribbon** towards the top of the screen labelled **Import** is disabled and cannot be selected. This is because an EMIS Web document template folder has not been selected—the surgery name rather than a folder is selected.
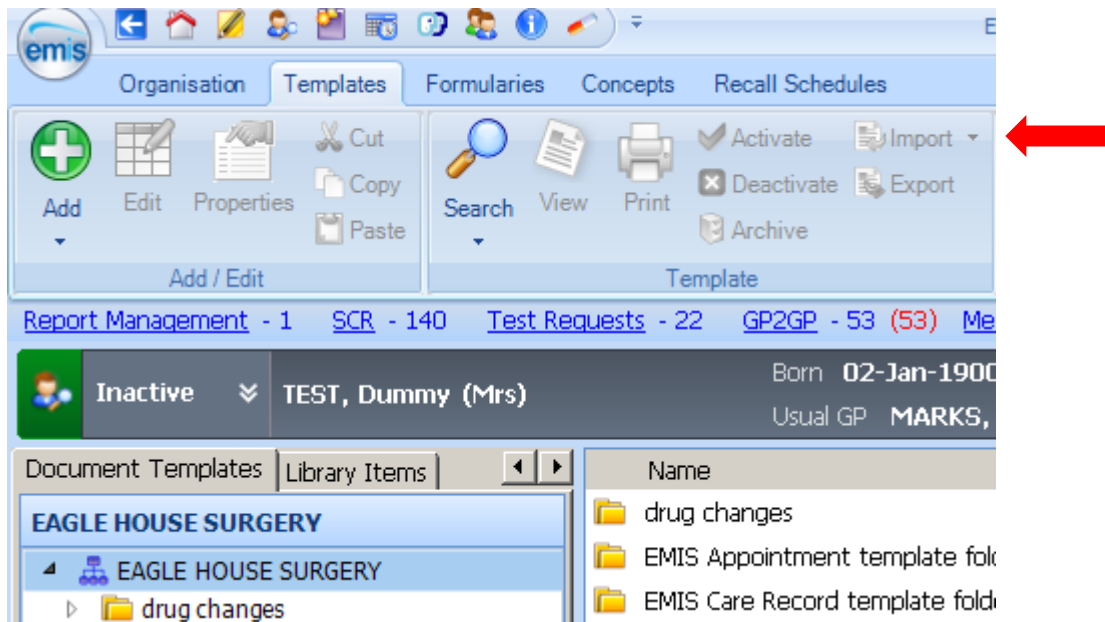
10. When you select an EMIS Web document template folder, the button labelled **Import** is enabled.
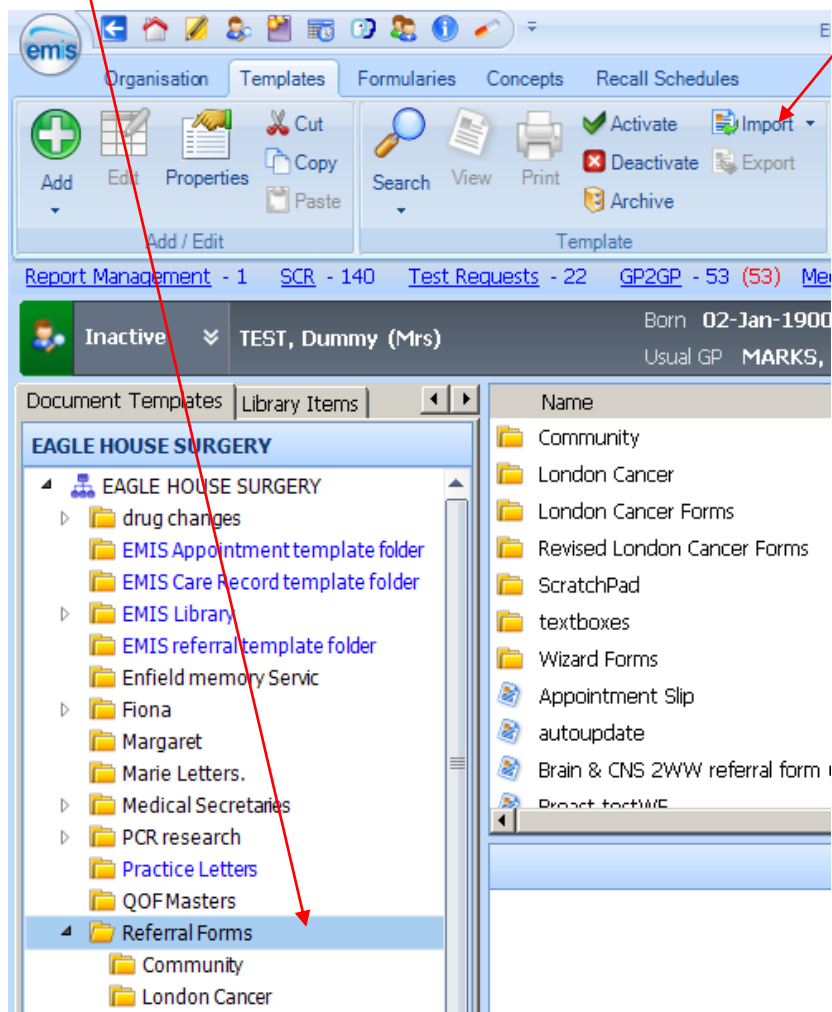
11. You can now click on the **Import** button.
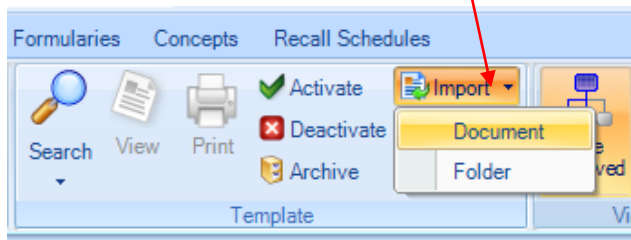
12. You are given the choice of importing either an entire folder or just a single document template (.ewdt file).

If you import a **single document template**, the template is placed within the EMIS Web document template folder you originally selected.

If you import an **entire folder**, it becomes a **sub-folder** *within* the EMIS web document template folder you originally selected. This sub-folder will contain all the files you have downloaded.

13. You will now be able to select the file or folder you wish to import. This must be located somewhere on your computer. If you have been following the instructions in this document, you will find the files located in a folder on your Windows desktop named **Pan London Forms**.
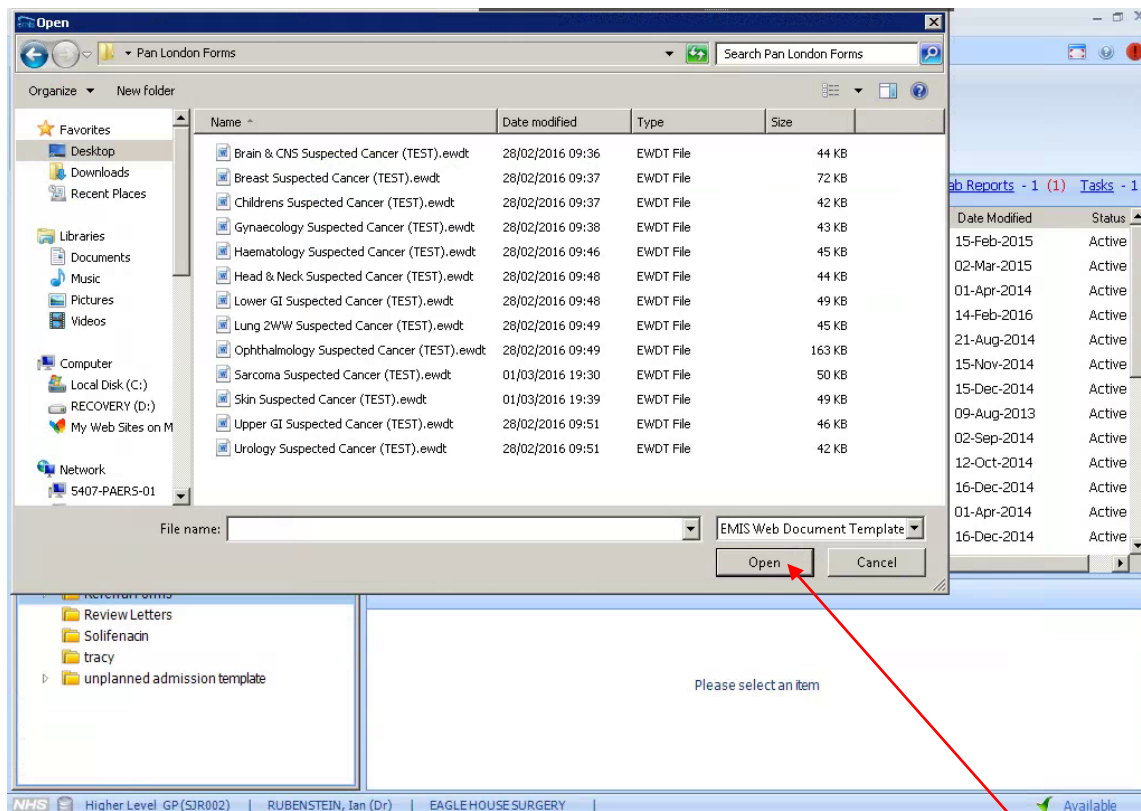
14. Select the file or folder you wish to import and click on the button marked **Open**.

15. The document template or folder will appear on your EMIS Web system, stored within the EMIS Web document template folder you originally selected.

You have successfully imported your document template.

Altering a form

The Pan London forms are **semi-protected,** which means you can use form elements such as check boxes but still alter most of the text in the document without disabling form protection.

You will need to alter the form document template because EMIS Web does not have the ability to add your surgery's bypass telephone number (your surgery's private number, which is not for general release).

Of course, you can do this once you have generated a referral form. However GPs would have to do this each time they made a referral.

If you open up the form *document template* from the **Template Manager** screen you can enter the surgery bypass number into the document and save it.

This will then display each time the document template is used to generate a referral form.

See picture right, which shows how to bring up the **Template Manager** screen.
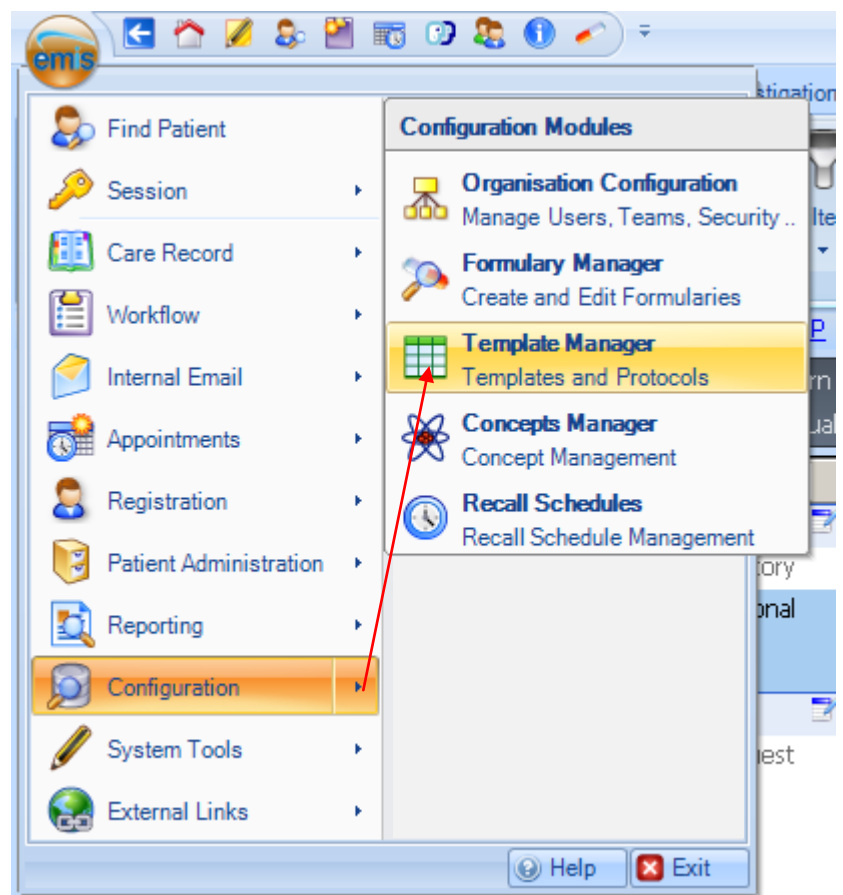
Open the required form document template from the **Template Manager** screen by right-clicking on it with the mouse and choosing menu item **Document Template** and then menu item **Edit** from the pop-up menu.
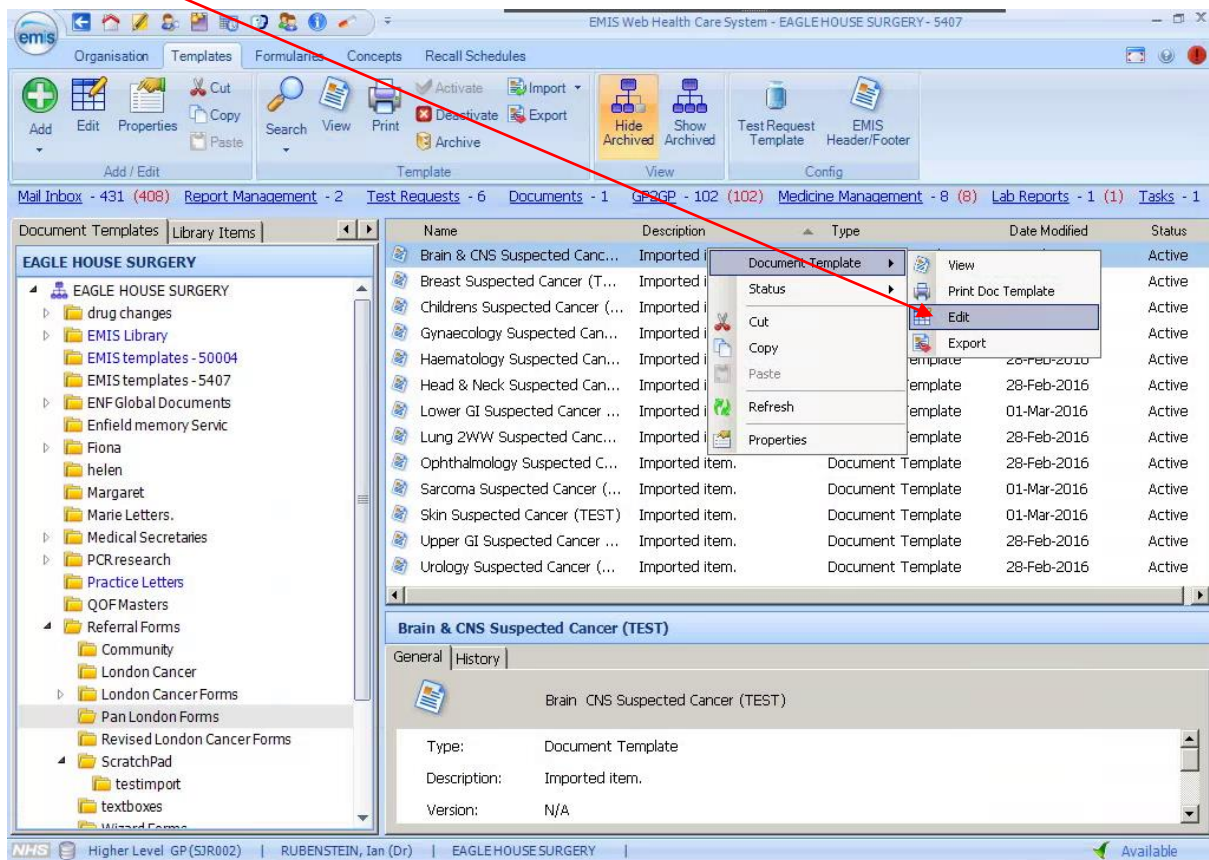
Details such as surgery bypass telephone numbers can be edited without disabling form protection.

When a form has been generated, you can alter most of the patient and practice details without disabling form protection.

However, the clinical details section is protected.

In the following section you will be shown how to disable form protection so you can make the form fully editable. However, you should note that you will have to re-enable form protection once you have done this, otherwise check boxes and text boxes will not work.

How to disable form protection

1. You must have the **Developer tab** activated on your Microsoft Word **Ribbon menu**.

2. You cannot activate the **Developer tab** from a Microsoft Word document within EMIS web. You need to run Microsoft Word as a *separate application* from your Windows **Start** menu.

3. Right-click with the mouse anywhere on a blank area of the Microsoft Word **Ribbon menu** below any large buttons and select the menu option **Customize the Ribbon**.
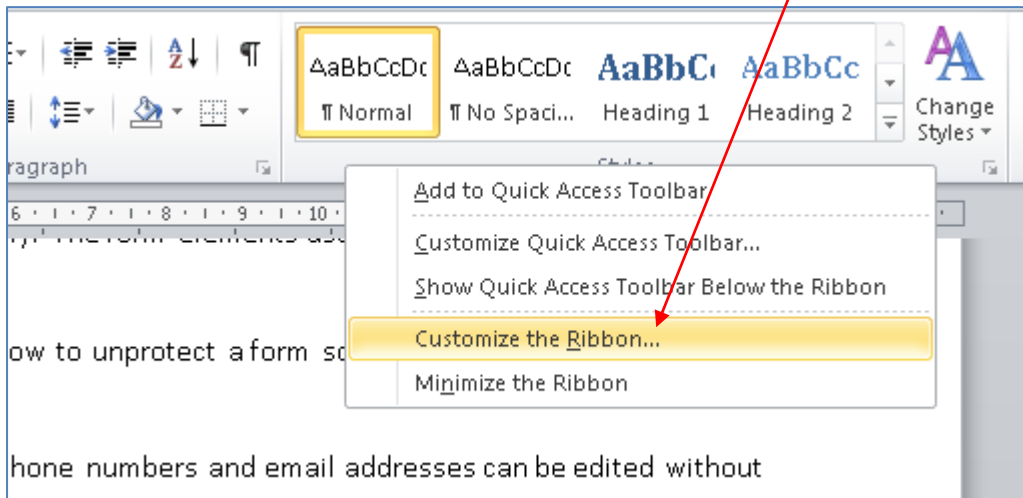
You will be presented with the window shown below.
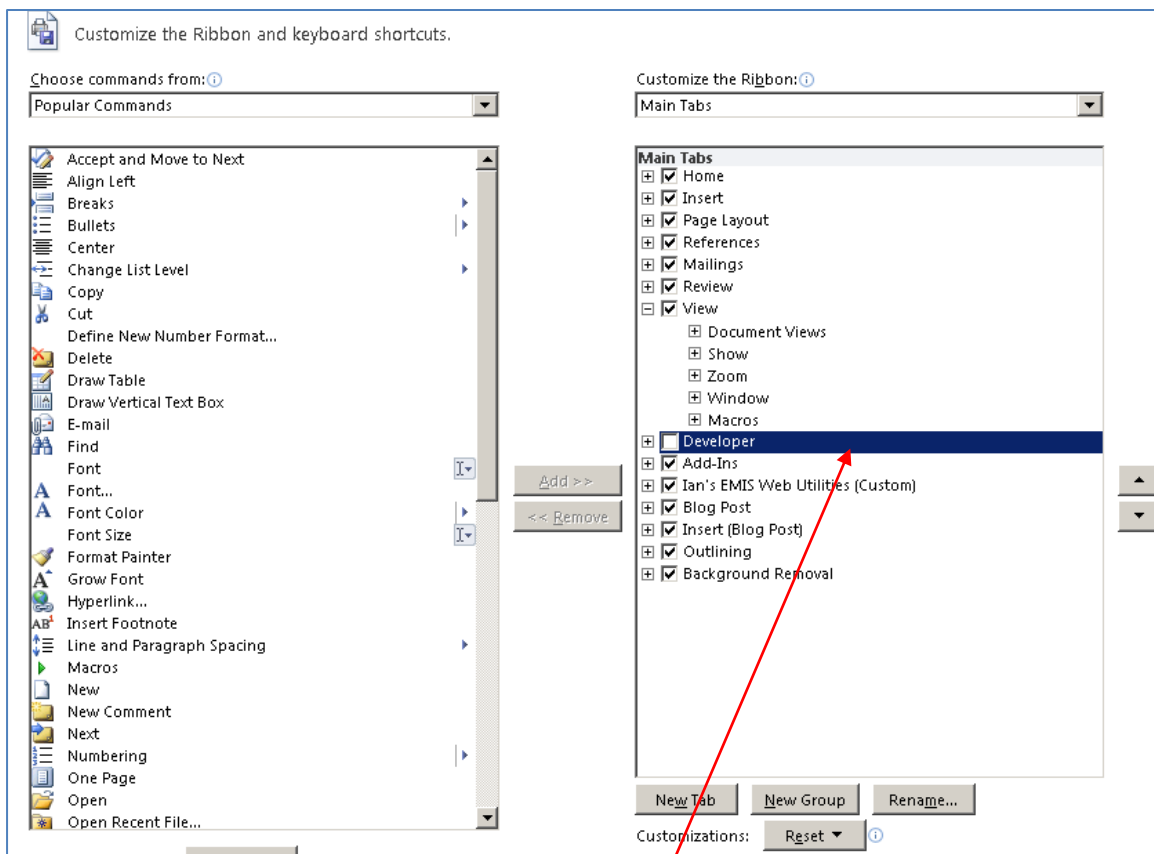
4. The box to the right of this screen allows you to customise the ribbon. Highlight the **Developer** option. Enable the **Developer tab** by clicking on the small check box with the mouse.
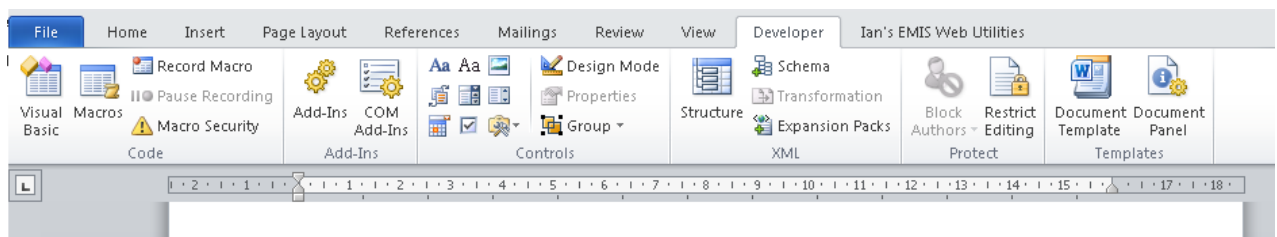
5. Next, close this window by clicking on the button labelled **OK,** located at the bottom-right of the window.
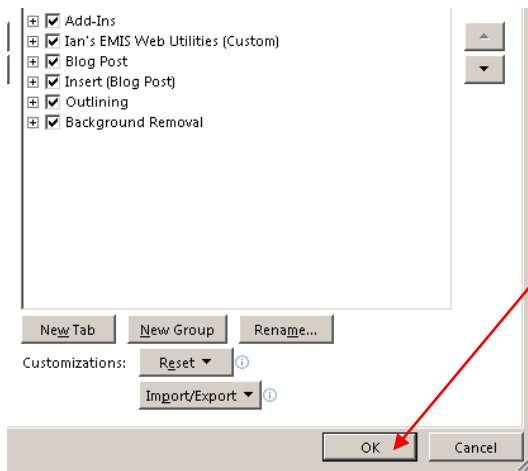
6. The **Developer** tab has now been enabled in Microsoft Word on your computer (see picture, below)
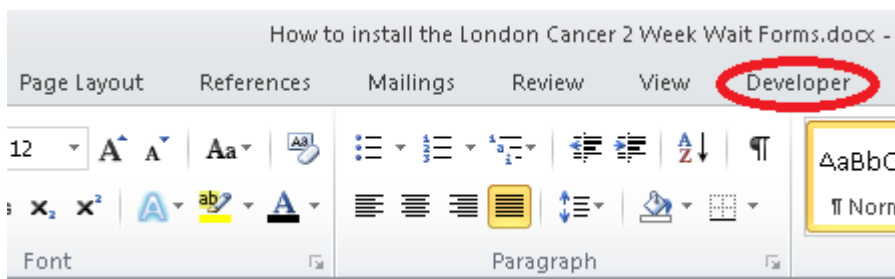
7. Click on the **Developer tab** (ringed in the picture above) to display the **Developer** ribbon menu (see picture, below)

8. Having activated the **Developer** ribbon menu, it will be available within document templates being edited from within Microsoft Word running under the control of EMIS Web.

9. You are now ready to disable protection for an EMIS Web document template.

First, you must open up the document you wish to alter from the **Template Manager** screen in EMIS Web. Choose to **edit** the relevant document template (see picture, below).
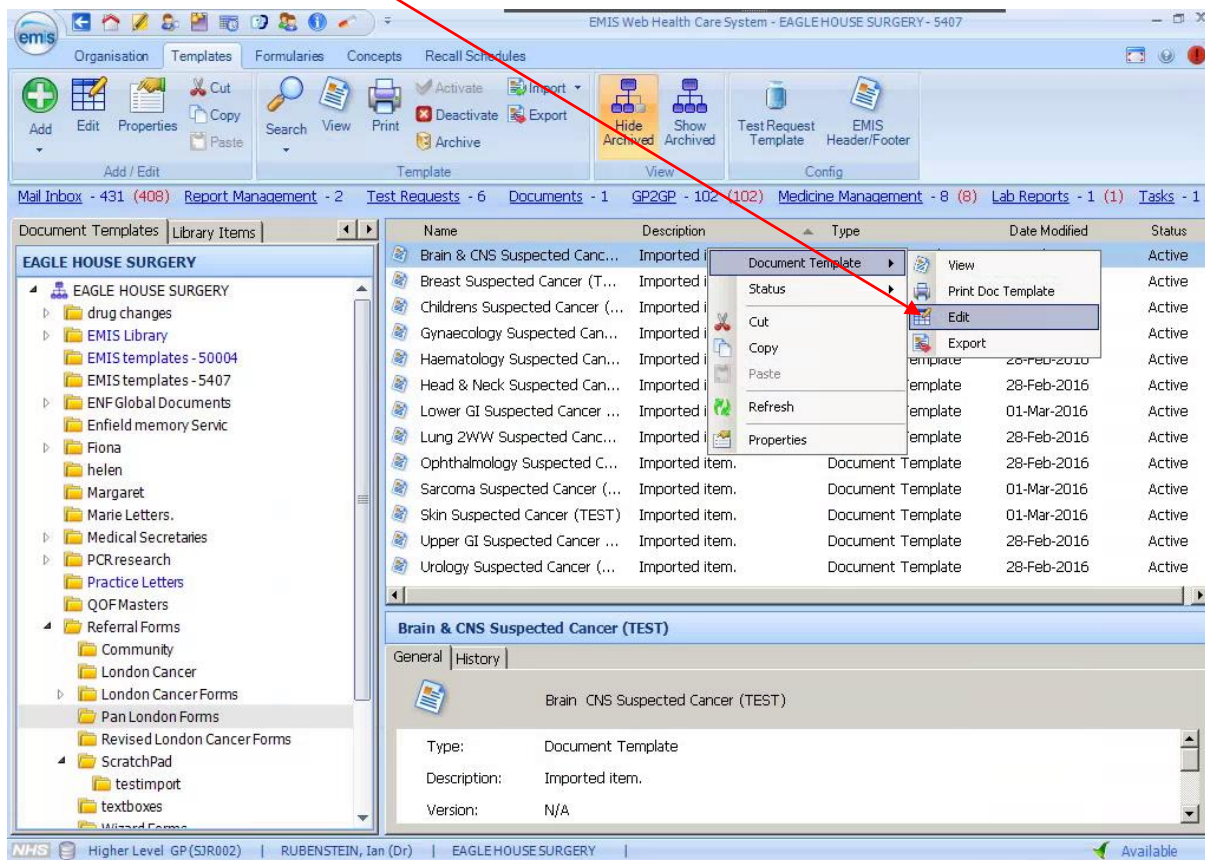
10. Once the template has been opened, click on the **Developer tab** to display the **Developer ribbon menu**.
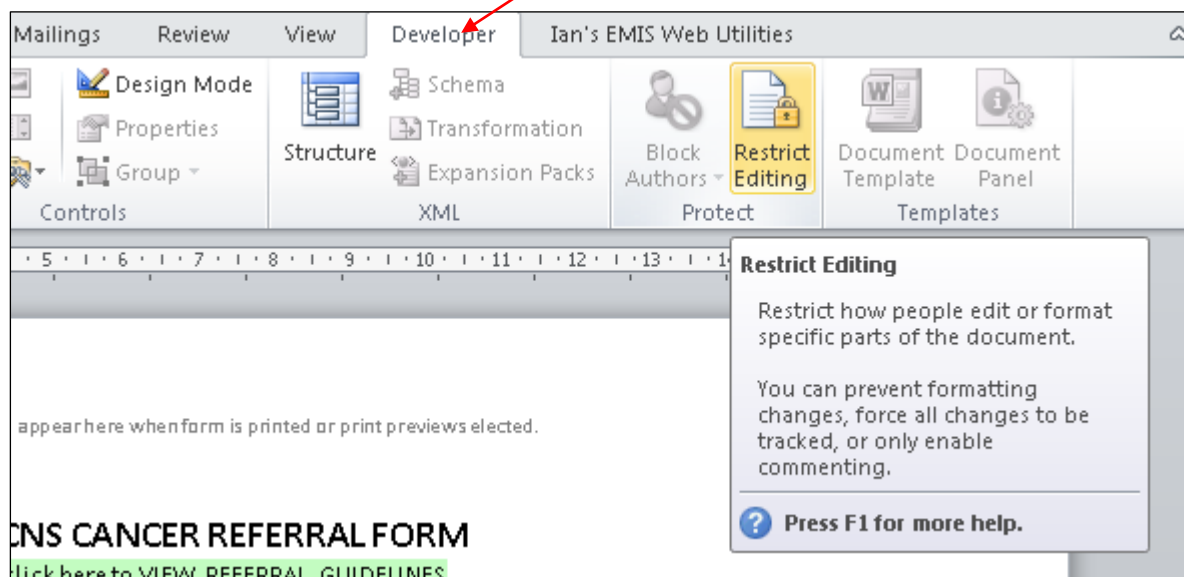
Click the **Restrict Editing button.** A panel is displayed to the right of your document.

Notice the button at the bottom of this panel labelled **Stop Protection**. Click this button to turn protection off.
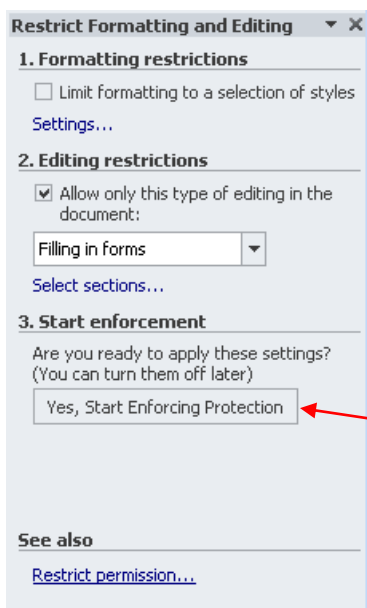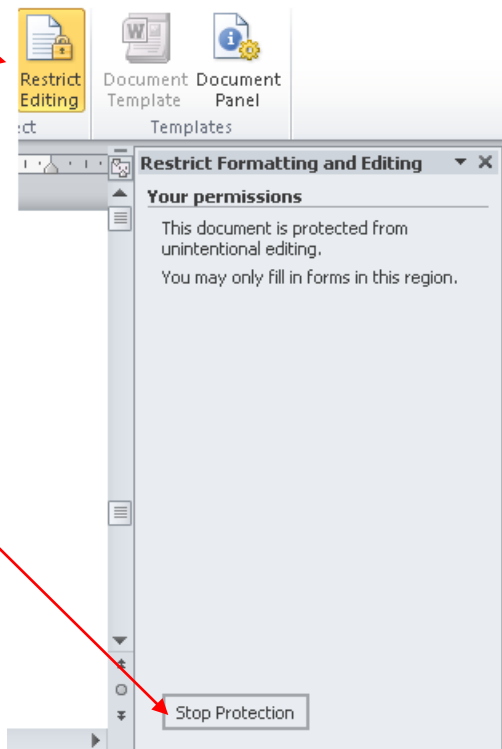
When you do this, the panel alters, giving you the option to **re-enable protection** when you need to. You can now make as many changes as you wish to the document. When you have finished, you will need to re enable protection.

11. **Restoring protection** is the reverse of the process described above.

Note the item labelled **Editing restrictions** in the panel (see picture, left).

It is important that the check-box below it labelled **Allow only this type of editing in the document** is checked and that **Filling in forms** is shown in the box below it.

Click on the button in the panel to the right of your document labelled **Yes, Start Enforcing Protection.**

This will display a dialog box asking you if you would like to add a password (see picture, below).

You will not be using a password, so keep the password boxes empty and just click on the button labelled **OK**.

Your document is now protected and check boxes on the form will respond to mouse clicks as expected.

How to produce a referral form for your patient

1. When you wish to use one of the forms to refer a patient, you need to create a new document within your patient's medical record from the **Documents** screen in EMIS Web.

Click on the **Add** button on the far left of the EMIS ribbon menu.

Choose menu item **Create Letter** from the drop-down menu.
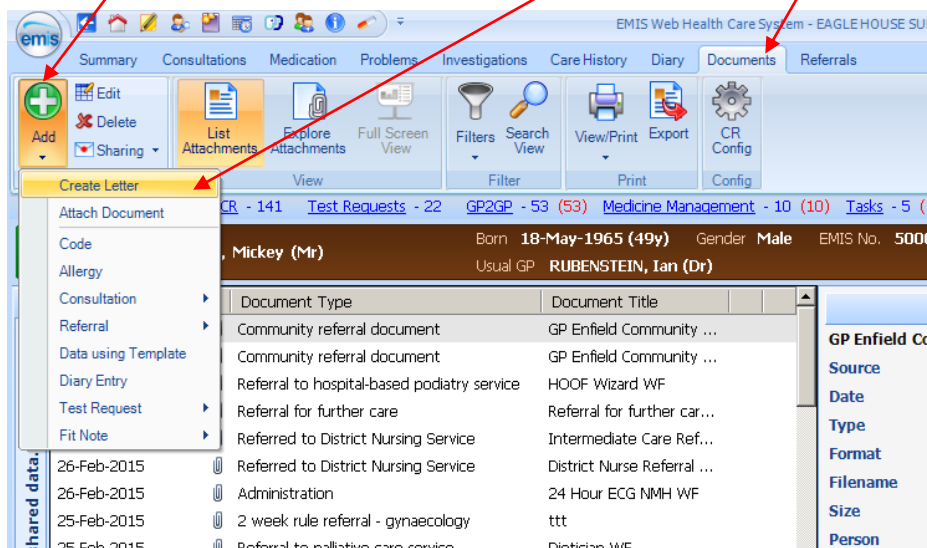
2. A dialog box appears which contains a list of the most recently opened documents. Click on the **search button**.
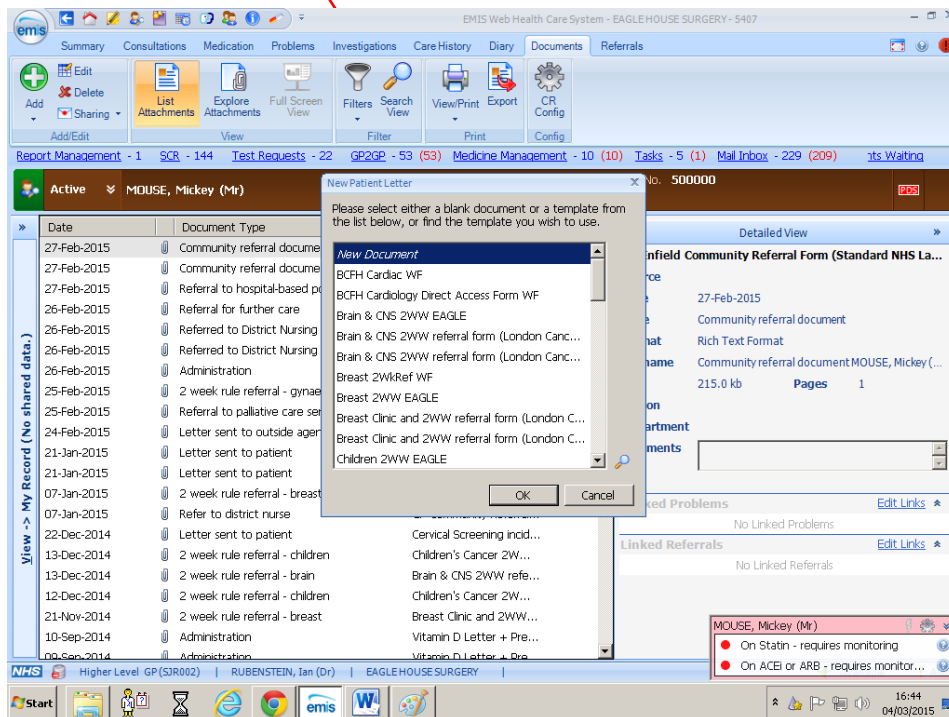
3. You are presented with a new screen. This has an EMIS Web folder list displayed on its right hand side, enabling you to select the form you wish to use (see picture, below).

Alternatively, type the name of the form into the **search box** in the top left hand corner of the screen and click the **search button**.
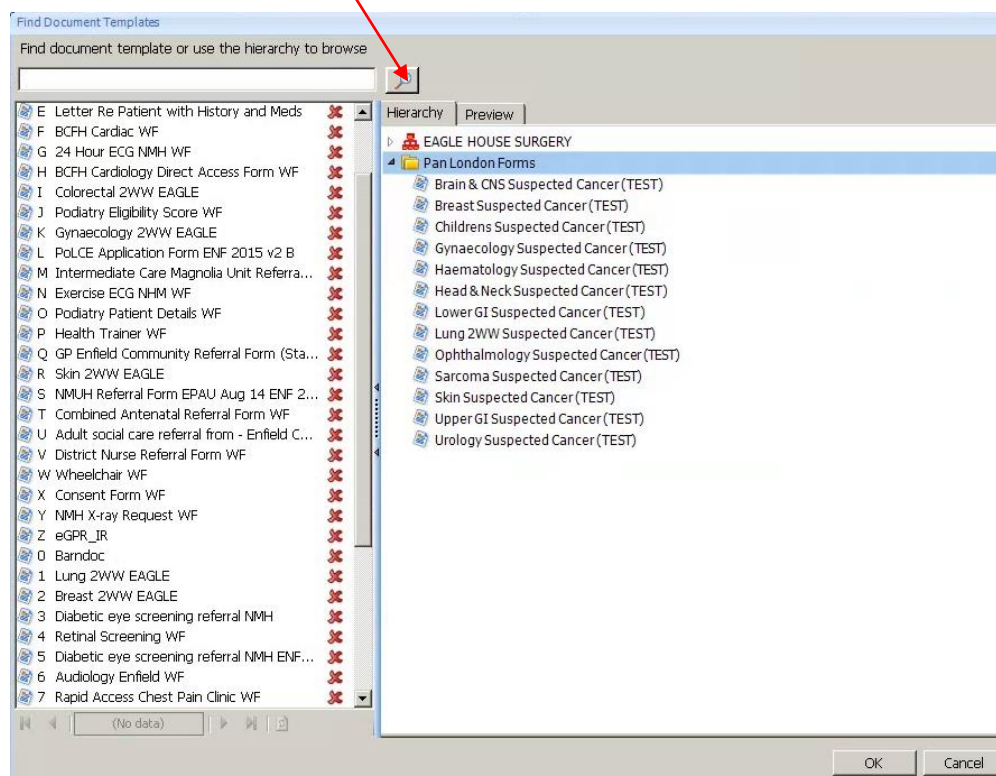
4. When you have found the form you wish to use, select it and click on the button labelled **OK** to open it. You are then presented with your form.

5. The patient and practice details will have been pre-filled, including such items as the referral date, the name of the referring doctor and **routine clinical details** such as the results of any required investigations, current repeat medication, allergies and major medical problems.

6. **You should always review the routine clinical details before sending the form off.**
Delete any irrelevant details and make sure that everything required for the referral has been placed on the form.

Sending your form: fax or email?

It is NHS policy that all forms will be sent via email or by e-referral instead of fax by April 2016.

Each Pan London suspected cancer form has a web link to an on-line directory on the first page of the form. The directory lists the hospitals/trusts together are available to take your referral. Full contact details are provided.

Contact details can be copied onto the form using standard Microsoft Windows copying and pasting and can also be pasted into Microsoft Outlook in order to email the form.

SECURITY NOTE:
1. Only send forms **from** a secure (nhs.net) email address.
2. Only send forms **to** a secure (nhs.net) email address.

Emailing your referral form

EMIS Web has the facility to allow you to send forms or any other document by email.

You must have Microsoft Outlook installed on your computer. Ideally your surgery should have a r**eferrals email account**. This is a general account not specifically attached to one individual.

You will need to know the email address of your referrals account and its password.

These details need to be added as an **account** to each copy of Microsoft Outlook on every computer in your surgery.

If EMIS Web and Microsoft Outlook have been set up correctly emailing forms is very simple, though there are some bugs in EMIS Web you need to be aware of.

Setting-up Microsoft Outlook

In order to do this you must have **Microsoft Outlook** installed on your computer.

If it has been installed you will be able to find it by clicking on the **All Programs** menu item from the Windows **Start** menu.

You will be presented with a list of all the programs installed on your computer.

Microsoft Outlook is part of the Microsoft Office 2010 suite of programs and can found by clicking on the folder marked **Microsoft Office** (see picture, right).

Click on this in order to run Microsoft Outlook.

If this is the first time Microsoft Outlook has been used, it will open a software "wizard" which will ask you if you wish to add an email account.

You must have the following details to hand

1. The email address you will be sending referrals from.
2. The password for this email account.

Input the details when requested and your email account will be ready for you to use.
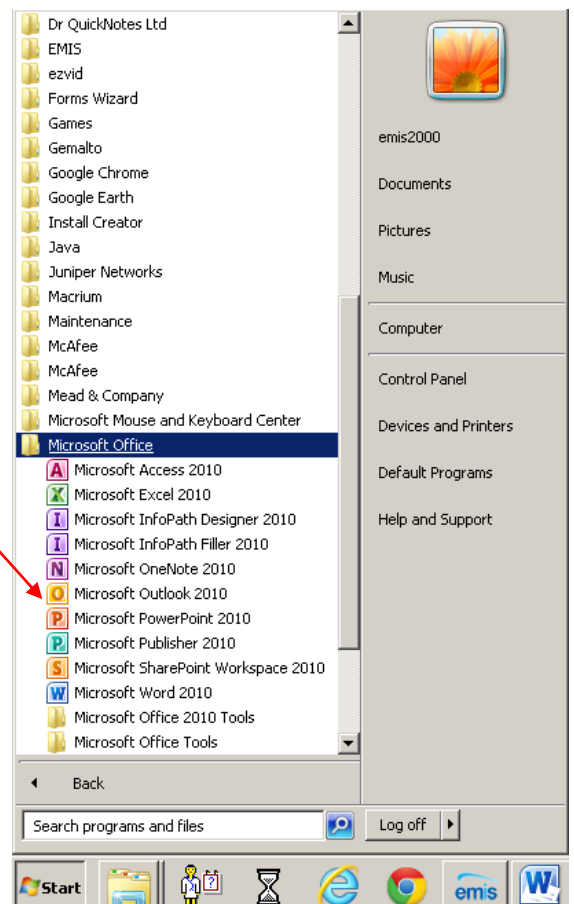
If the wizard does not run, you can add an account manually very easily.

Click on the **File** menu option.
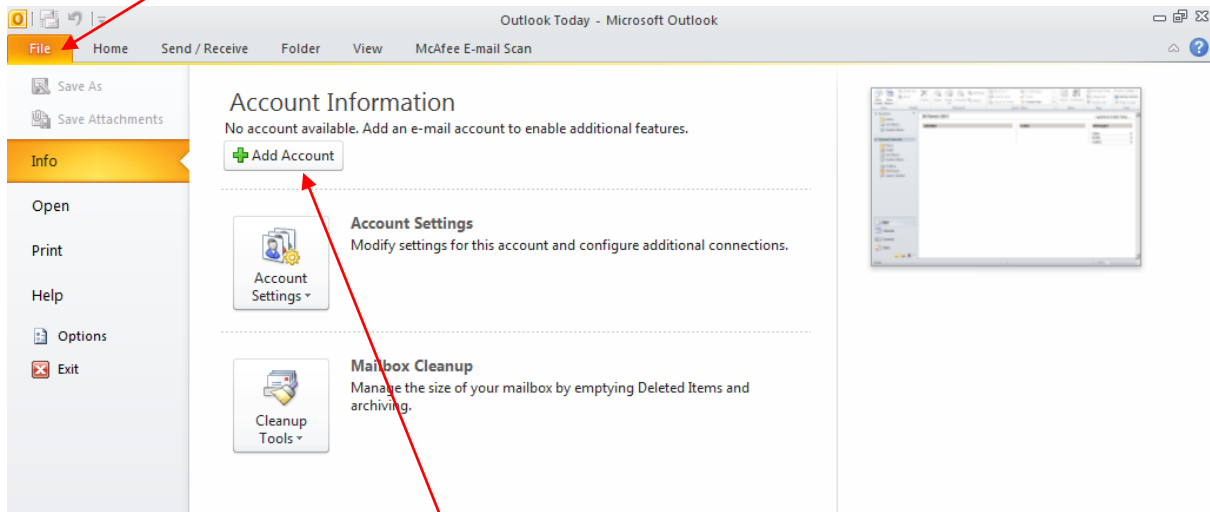
Click on the button marked **Add Account** and you will be taken to a screen that allows you to enter your email account's details.

You will be presented with the following window (see picture, below)
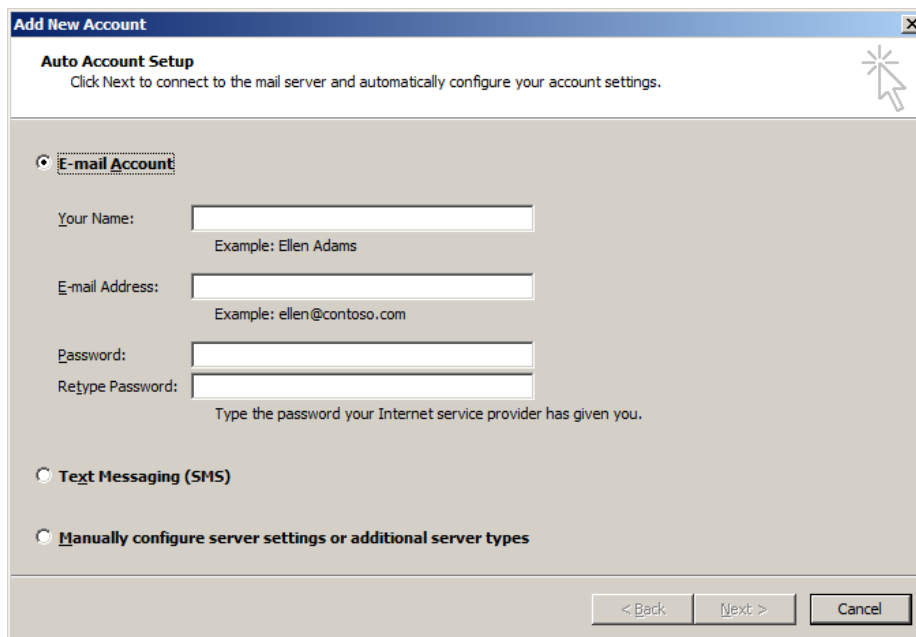
You will need to enter your account details in the relevant sections. Note that the email address of the account you are setting up is entered on the second line. The first line is for a descriptive name. You need to enter the account's password twice.
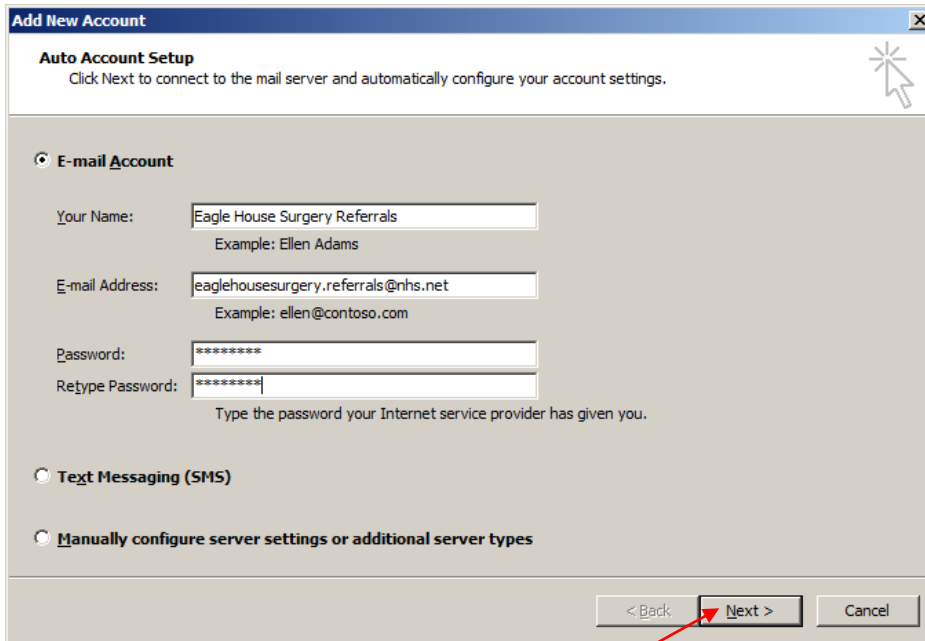
Click on the button marked **Next**.

Outlook will take a few seconds to set your account up
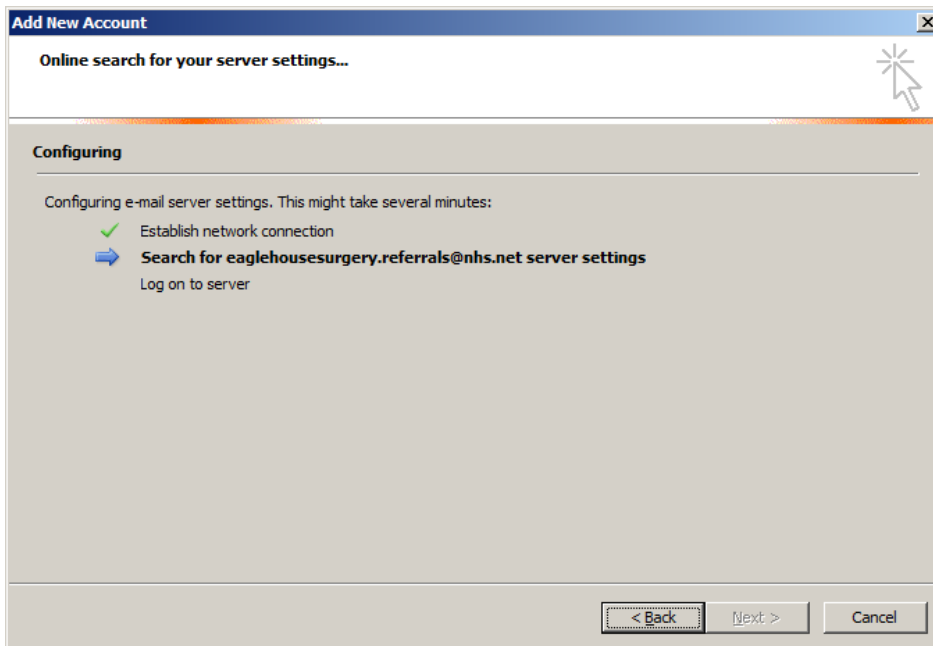
Eventually you should see the following screen indicating your email account has been successfully created in Microsoft Outlook.
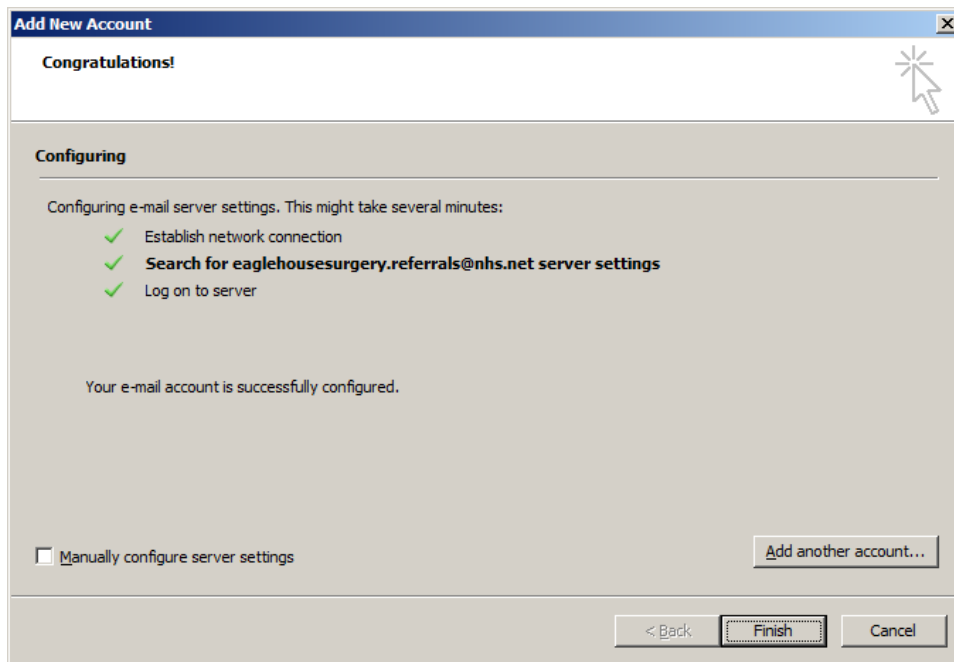
You are now ready to send emails with file attachments from your computer.

EMIS Web should be able to open up Microsoft Outlook and attach a document previously saved in a patient's medical record to a blank email. This can be sent to the relevant hospital trust.

Sending an email attachment using EMIS Web

In principle, this can be done when you save any document you have created.

Before you do so, however, you should copy the email address of the hospital trust you are sending the referral to.

The list of hospitals you are able to refer the patient to is accessed via a web link on the form.

Hold the control key down while you click on the link (see picture, below).
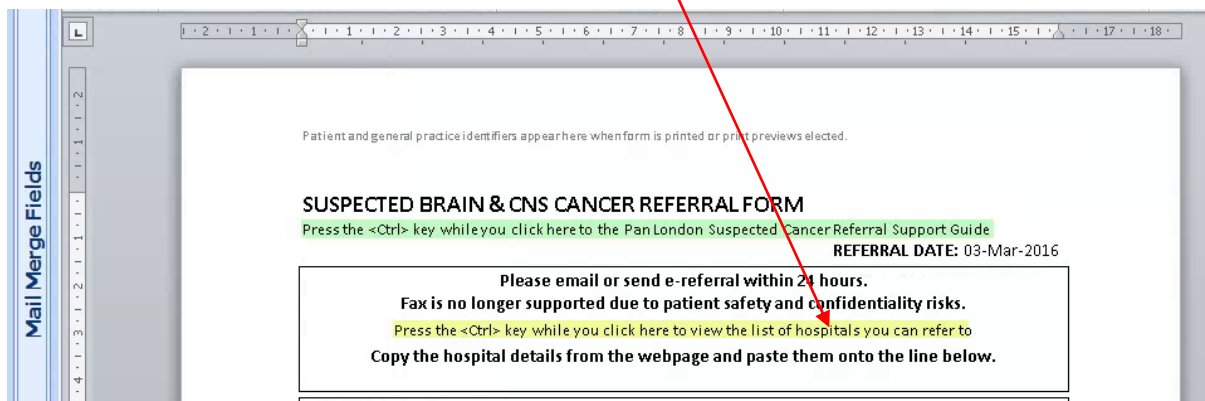
The list will be opened in your browser. What you see depends on the capability of your browser.

1. If you are using Internet Explorer version 8 or earlier (or older versions of FireFox or Opera) you will see the following screen (see picture, below)
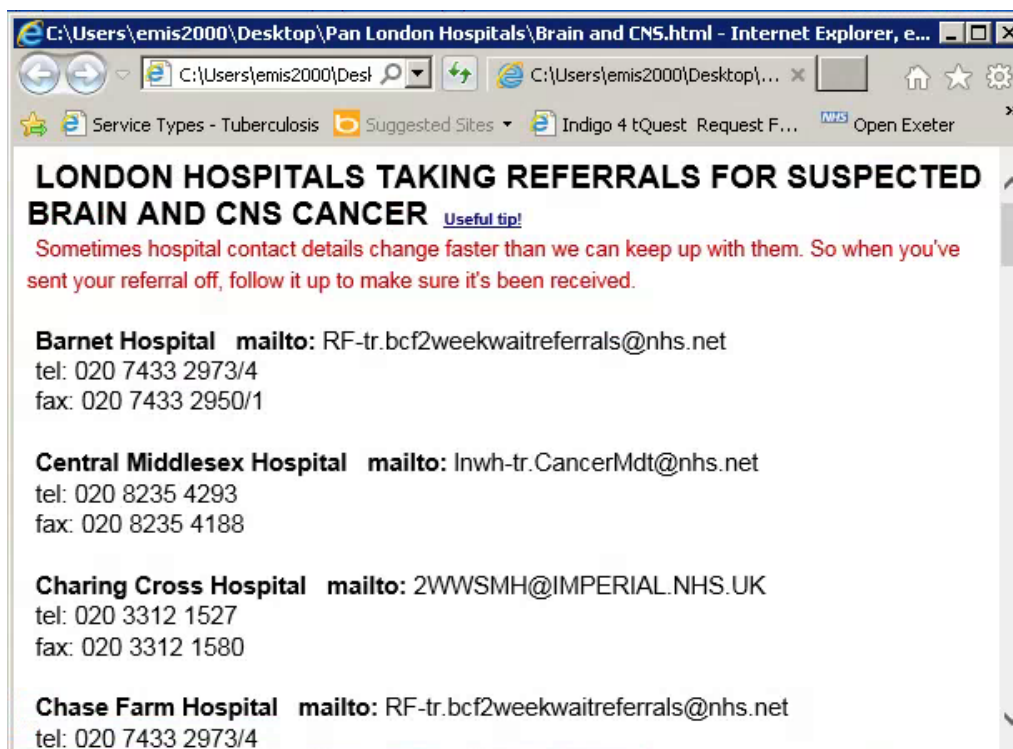
Using the mouse, select the hospital you wish to refer the patient two by clicking to the left of the hospital name, holding the left mouse button down and dragging the mouse the right to select the entire line (see picture, below)

Having selected the entire line, right-click with your mouse and choose menu option **Copy** from the pop-up menu (see picture, below).

You can now close your browser down and **return to the form**.

2. If you are using Chrome or Internet Explorer versions 9 or later (or updated versions of FireFox or Opera) you will see the following screen (see picture, below).

Select the hospital you wish to refer the patient to from the list on the left hand side of the screen (see picture, left).

If you can't find the hospital easily in the list, use the search box to help you find it more quickly (see picture, below).

The contact details of the hospital you have selected appear in the box on the right-hand side of the screen (see picture, right).

Click the button labelled **Copy selected hospital to Windows clipboard**. This will copy the hospital name plus the email address only (see picture, below).

Having copied the required details and depending on the capability of your browser, you may be offered the option to close the current tab.
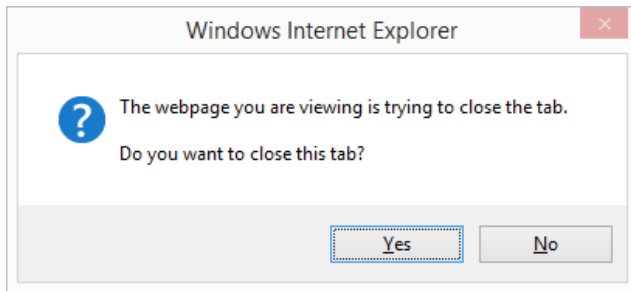

If you select Yes, and there are no other tabs open in your browser, the browser will close and you will return to your referral form. If there are other tabs open, you will need to return to your referral form manually.

The **referral form** has a line into which you can paste the copied hospital details.

Right-click on the form in this area (see picture, below)…
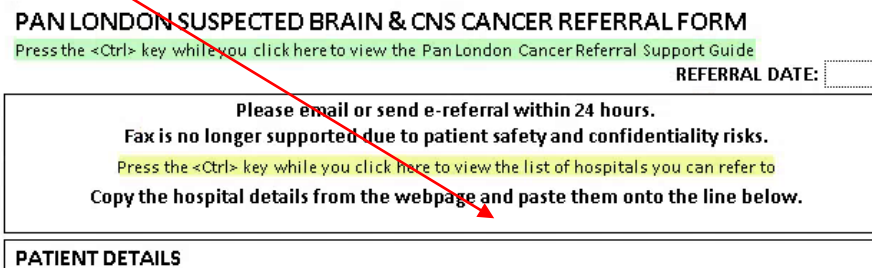
…and select the **first choice** from menu option **Paste Options**: from the popup menu (see picture, below)
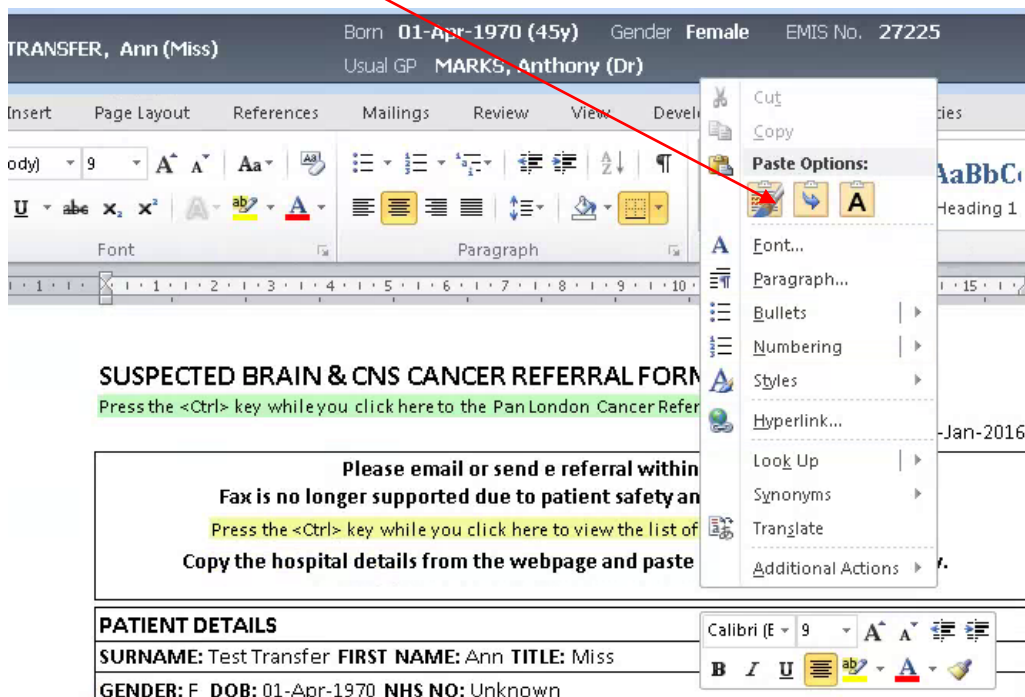
You can achieve the same result by pressing the keyboard combination **Ctrl + V**.

The hospital you selected, plus associated contact details, will now appear in the box on the form (see picture, below).


The hospital name and email address will remain on your Windows clipboard (provided you don't copy anything else in the meantime), ready for you to paste it into the **To** line of your email client. In EMIS Web systems this will typically be **Microsoft Outlook**.

Next, you will instruct EMIS Web to save the document and open Microsoft Outlook with the document as an attachment, which can then be emailed.

You will be familiar with saving documents if you have used EMIS Web for a while.

Clicking on the **File** button, which is situated to the left of the document being edited, gives you five different options.

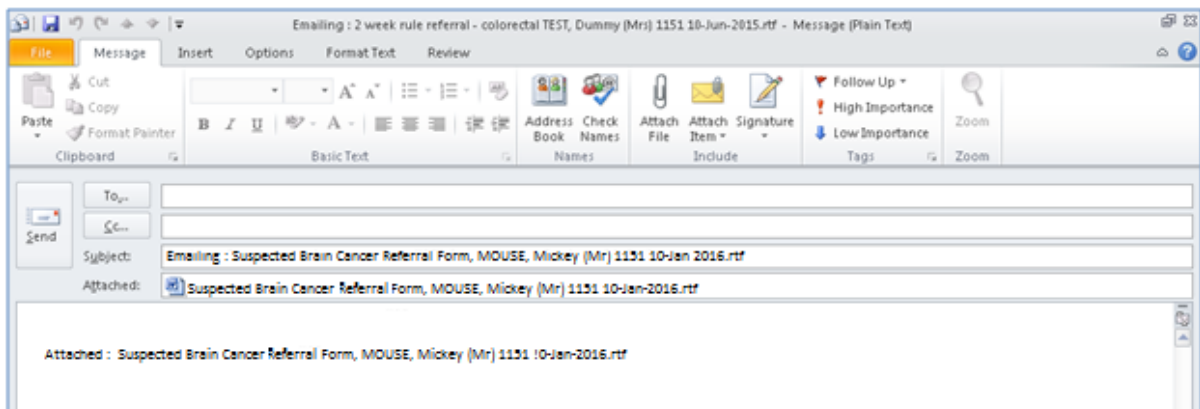In this case you will be choosing option **Save As** (see picture, below).
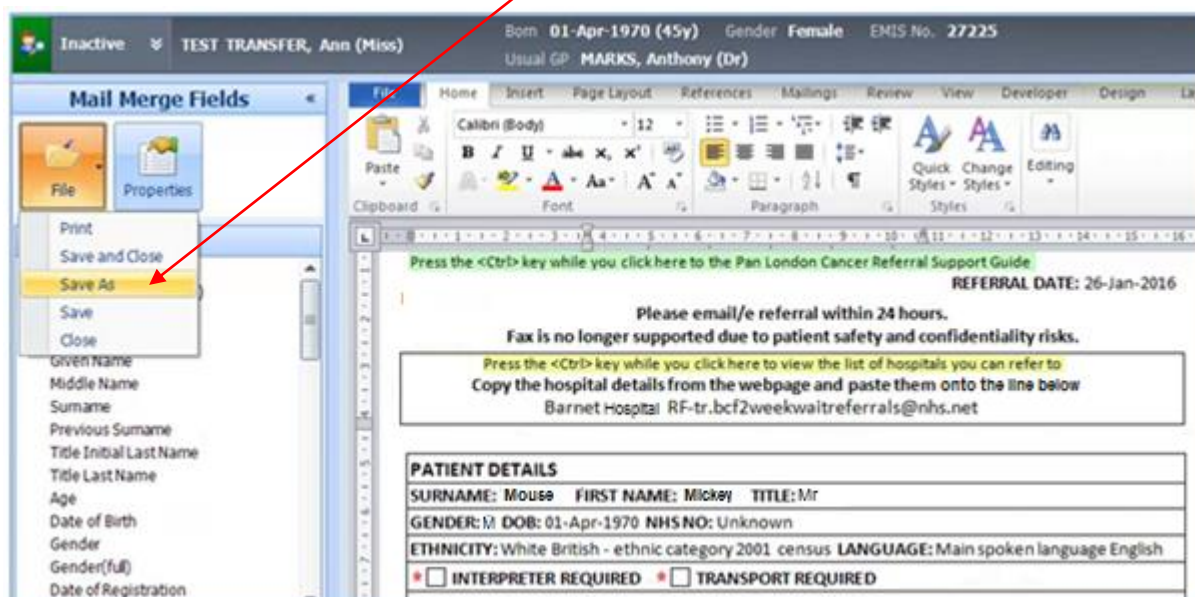
You will be presented with the dialog box shown in the picture (right).
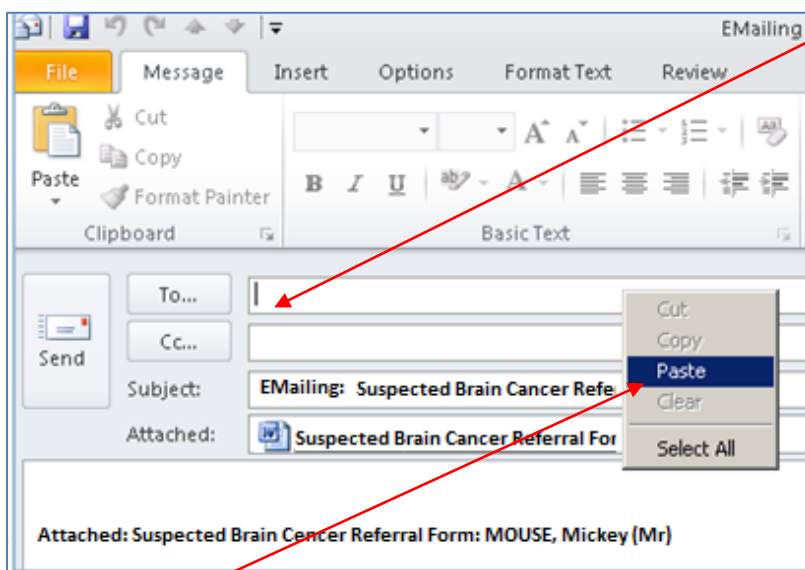
Check the box labelled **Send email**.
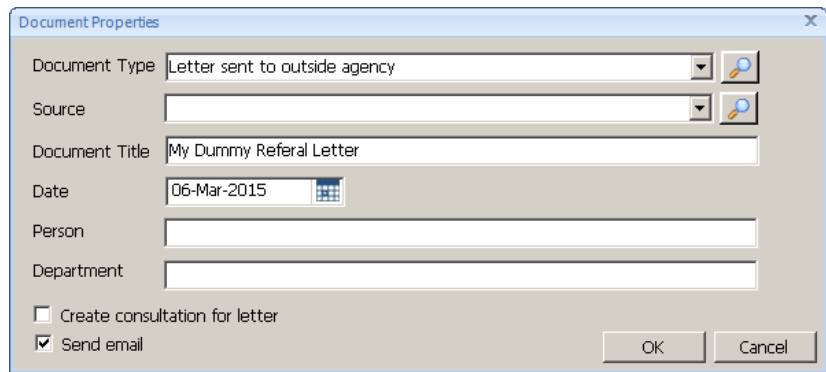
When this is checked, clicking on the button marked **OK** should save the file, open Microsoft Outlook and then open up a blank email with the document attached (see picture, below)
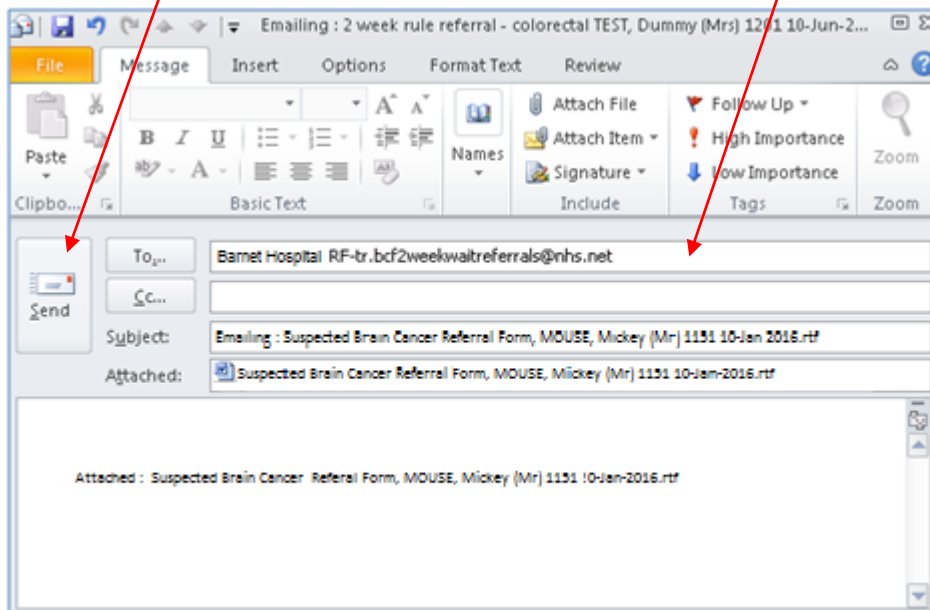

When Microsoft Outlook opens, place the mouse cursor in the box labelled **To…** then right-click with the mouse.
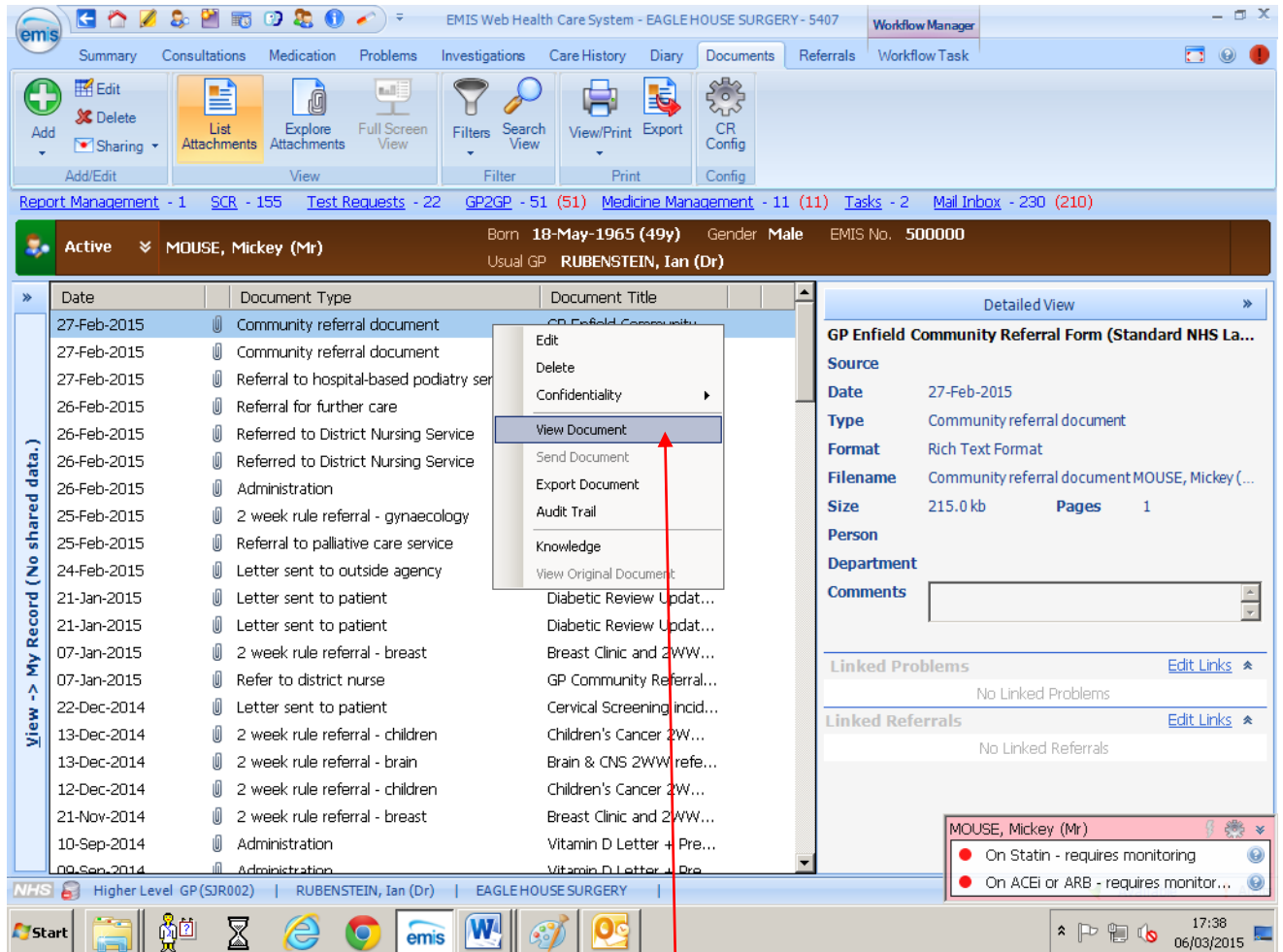

Select **Paste** from the menu.

The email address you copied from the form will then be pasted into Outlook.

Press the **Send** button to email the file to the hospital trust.

You can also email a file you have already created and saved from the **Documents** screen in the patient's medical record.
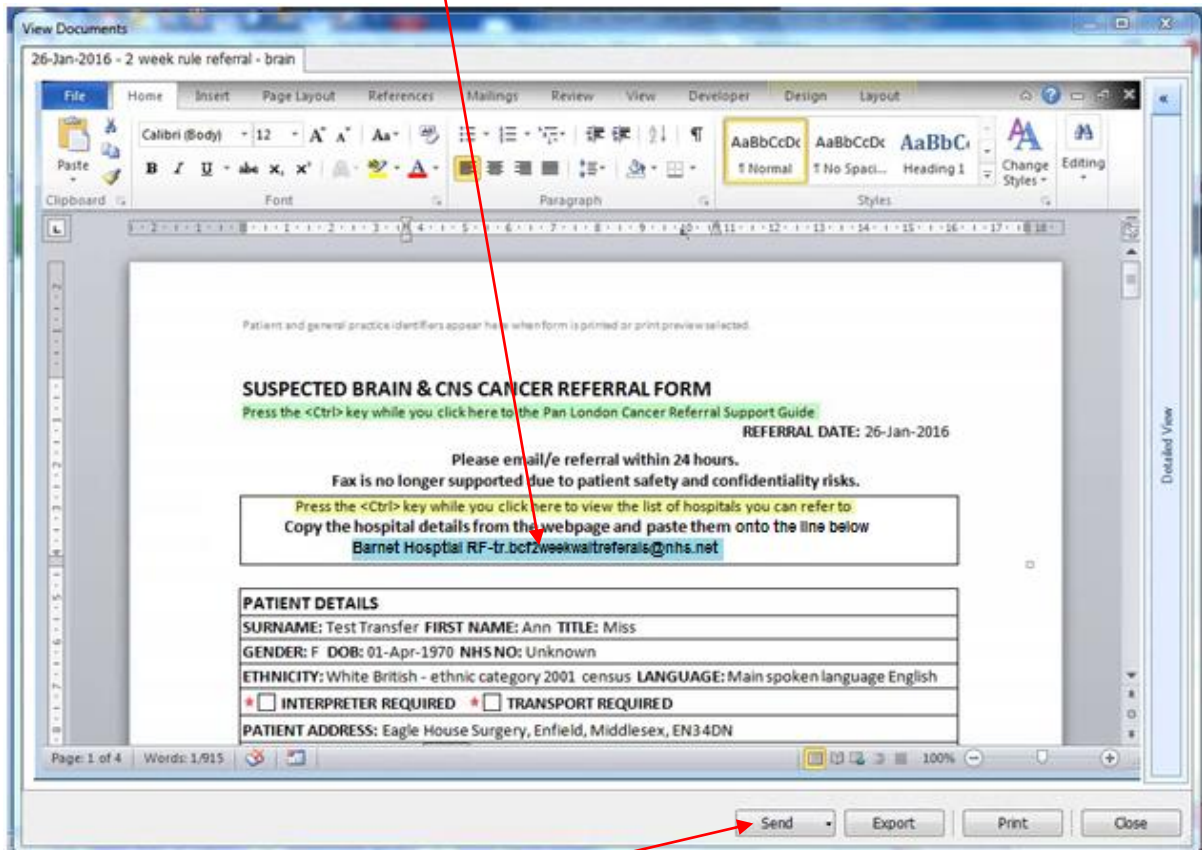

Select the document using the mouse.

Right-click on it and choose menu item, **View Document**.

The **EMIS Web Document Viewer** window will open, displaying your document, as shown in the picture below.
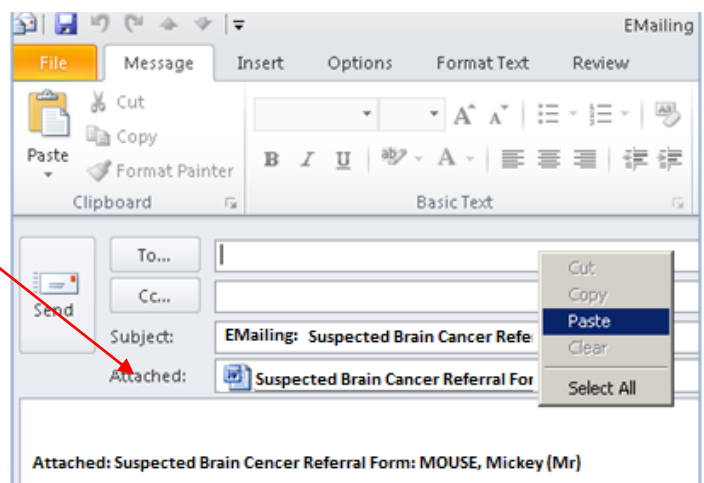
Once it has opened, **select and copy** the email address you wish to use from the document.
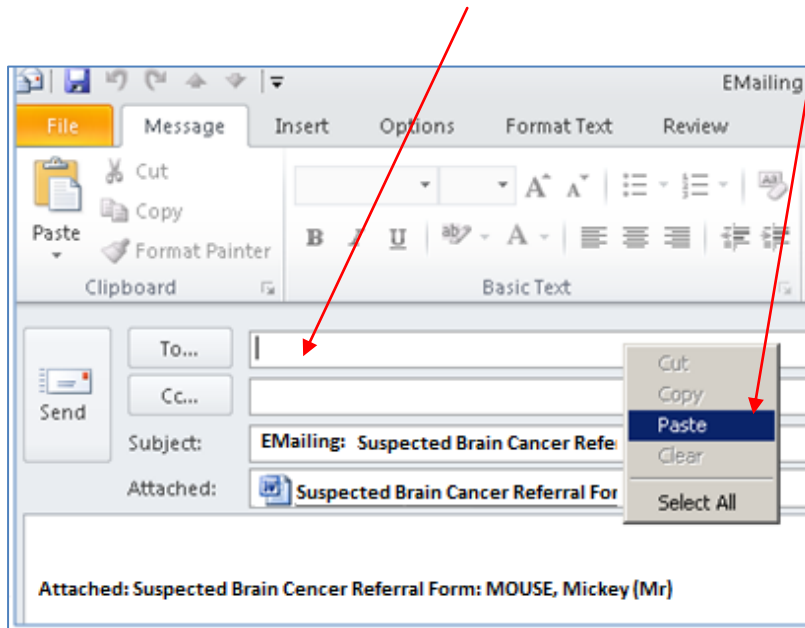

Clicking on the button labelled **Send** enables you to choose to send the document via email.
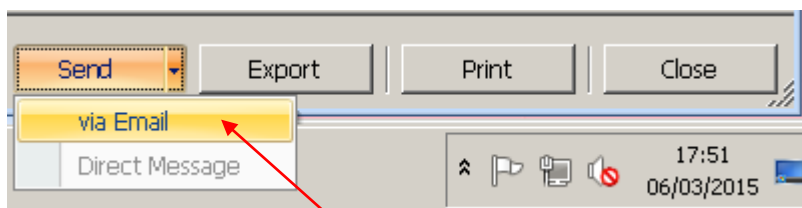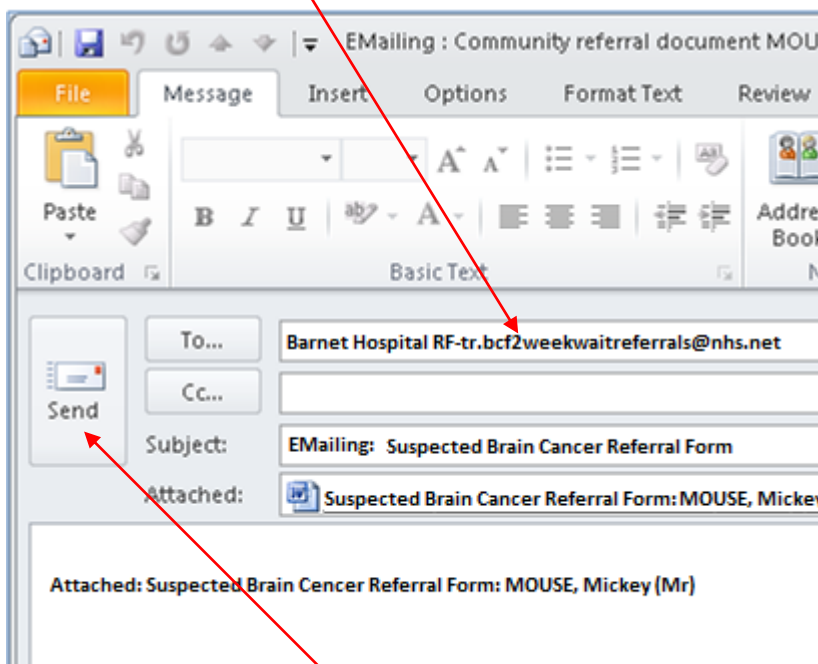

Select the menu item **via Email** and **Microsoft Outlook** will open up ready for you to send the attached document.

Right-click anywhere in the box labelled **To…** and select menu item **Paste**.

The hospital trust email address you copied will appear in this box.

Click the button labelled **Send** to send the email to the hospital trust.