Pan London Suspected Cancer Referral Forms for GPs

A step-by-step guide to installing and using the SystmOne Non-Integrated Word forms.

Dr Ian Rubenstein
Eagle House Surgery
Ponders End
Enfield

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.

SystmOne has two different ways of handling referral forms. They both use Microsoft Word. However the more modern method is to use what in SystmOne parlance is called "integrated Word". The older version is known as "non-integrated Word".

This manual discusses how to install and use the older, **non-integrated Word** versions of the forms.

The non-integrated word forms are provided as **SystmOne mail merge Word document templates** (files with the extension **.doc**).

They contain special codes which interface with SystmOne.

Opening a template as a document within a patient's SystmOne 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 as SystmOne mail merge Word documents**.

This booklet explains how to correctly install the SystmOne Mail Merge documents 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 SystmOne, you will need to download the relevant Word document file onto your computer.

These are available from the Pan London suspected cancer forms download site here.

Please download these to any convenient folder on your computer, for example your Winodws desktop (see picture, right).
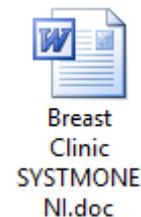
There are currently 13 different document templates that are used for suspected cancer referrals to various specialties.

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

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 SystmOne permissions to do this.

You will have been assigned a SystmOne **Role Based Access Control (RBAC) number**.

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 SystmOne 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 SystmOne, they will be available to all users on your network.

Next, follow these steps…

1. The picture below shows part of the SystmOne home screen.
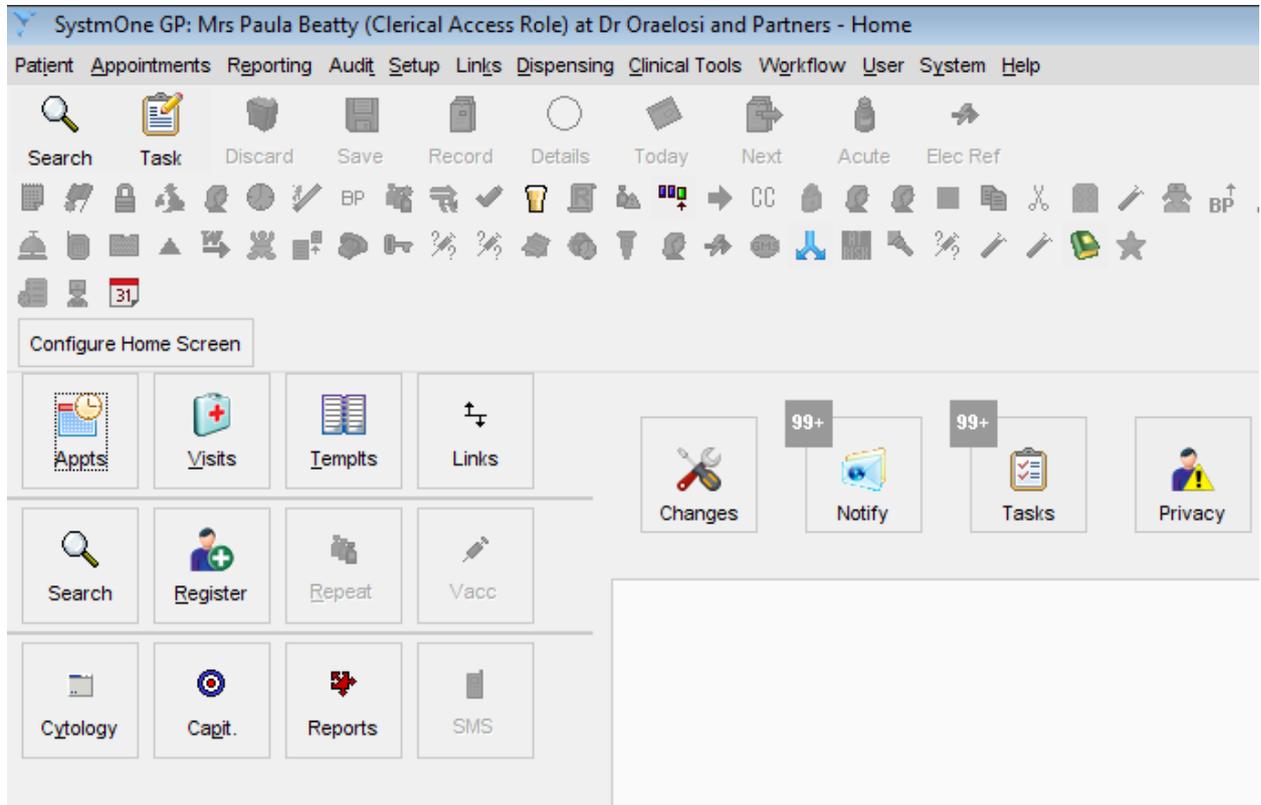
Click on menu option **Setup**, which is located on the SystmOne Menu at the top of the screen.
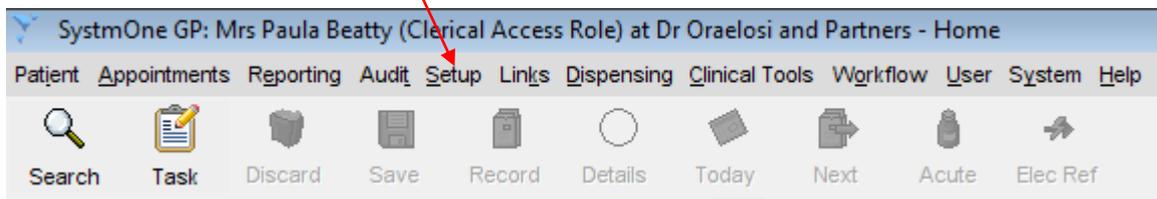
2. Click on menu option **Referrals & Letters** and then menu option **'New' Word Letter Templates.**
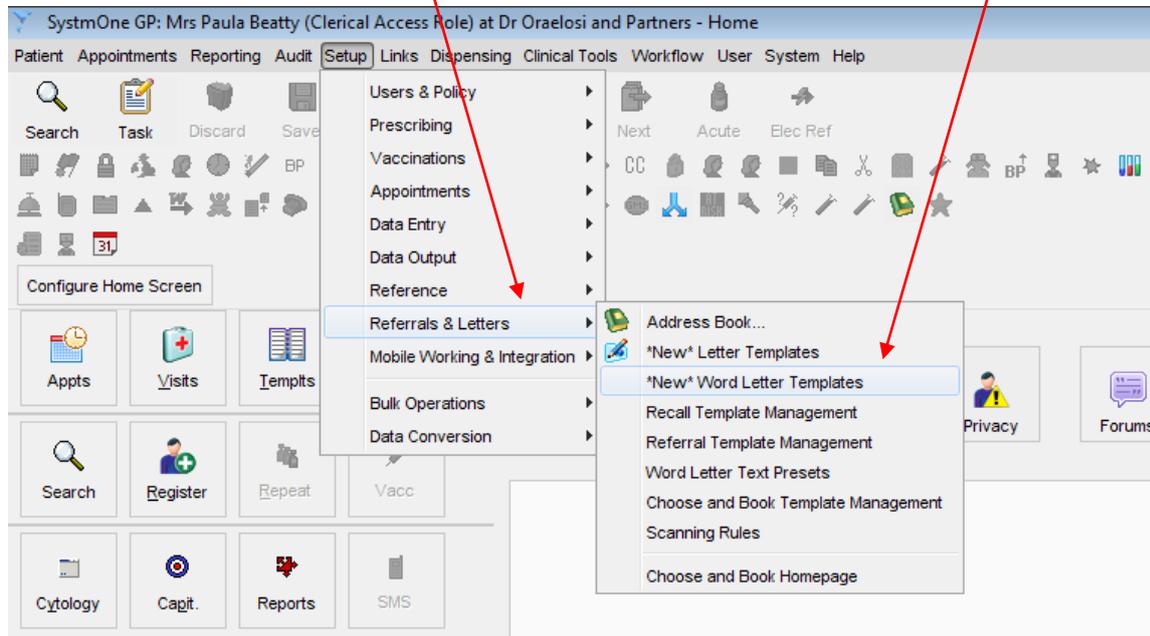

3. This will take you to the **New Word Templates** screen (see picture below)

There are are two panes on the New Word Templates screen:

The left hand pane allows you to find a letter template quickly by selecting the folder in which it is stored.

The right hand pane displays a list of the templates contained in the selected folder.
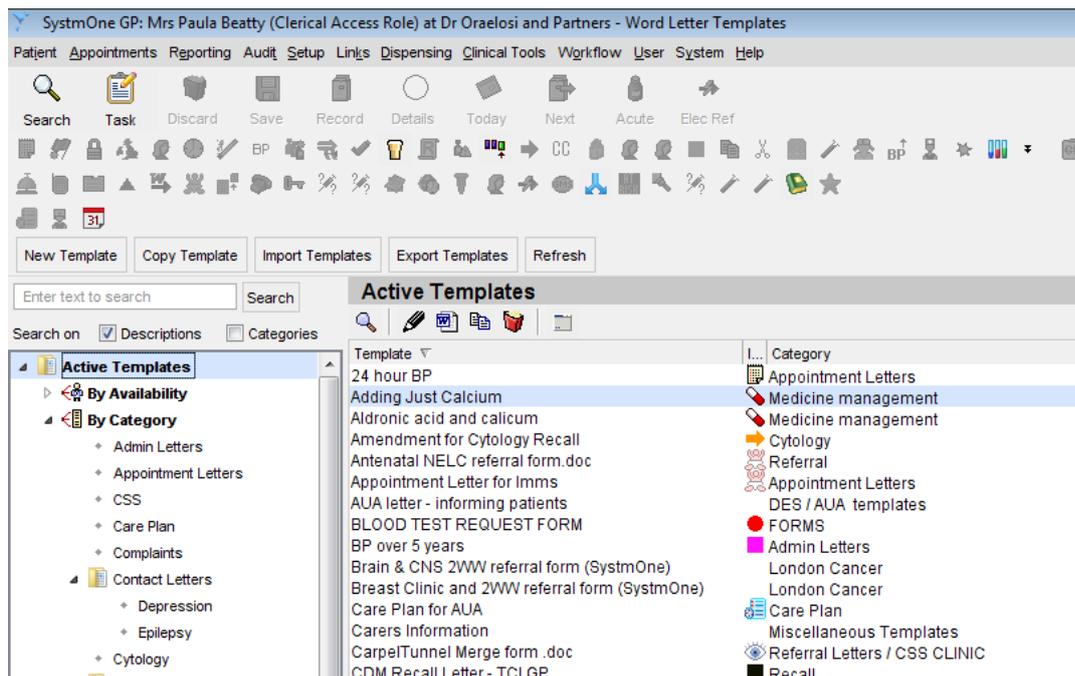
4. The next step is to import the new templates into the current list of active templates.

Click on the tab labeled **New Template**.
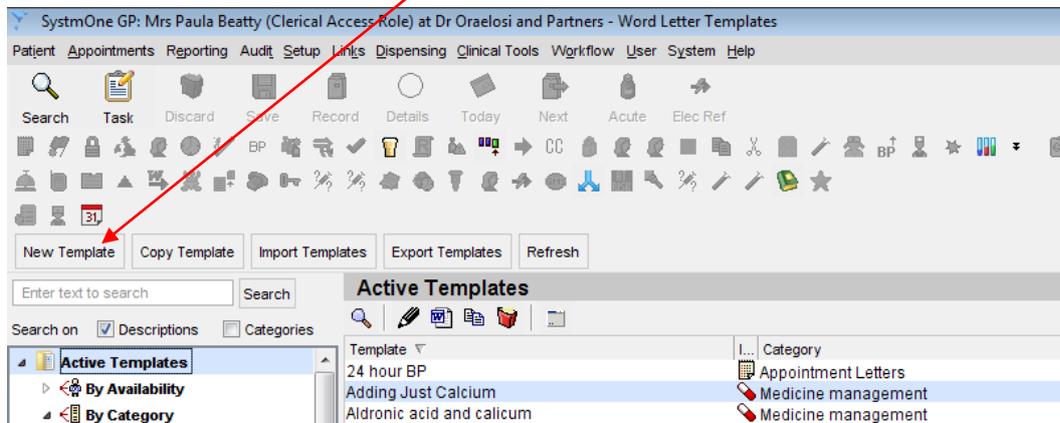
5. This opens the **New Mail Merge Document dialog box**. This allows you to find the folder containing the downloaded template files, which you should have downloaded onto your Windows desktop (see picture below).
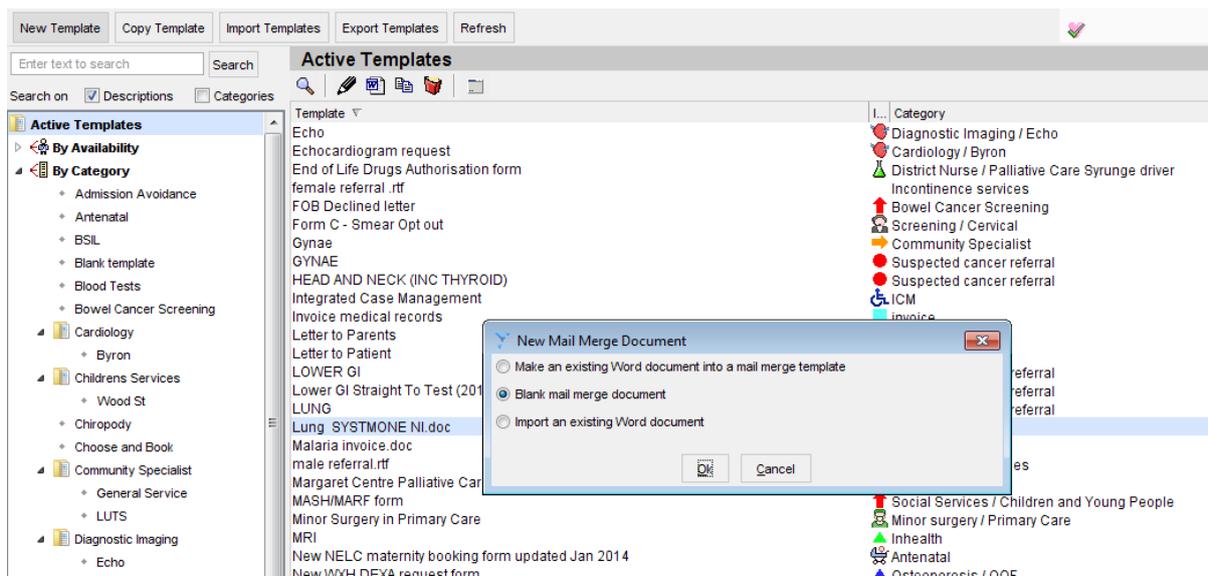
Please click on the small button at the top of the new Mail Merge dialog box
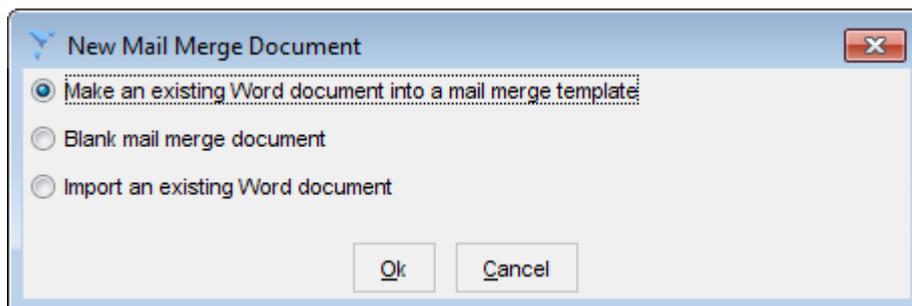
6. Use the file explorer in the Select Document dialog box to find the folder containing your downloaded file. If you have downloaded the Word doccument onto your Windows desktop, click the button labelled **Desktop** and **click once on the word document** you wish to import in order to highlight it.
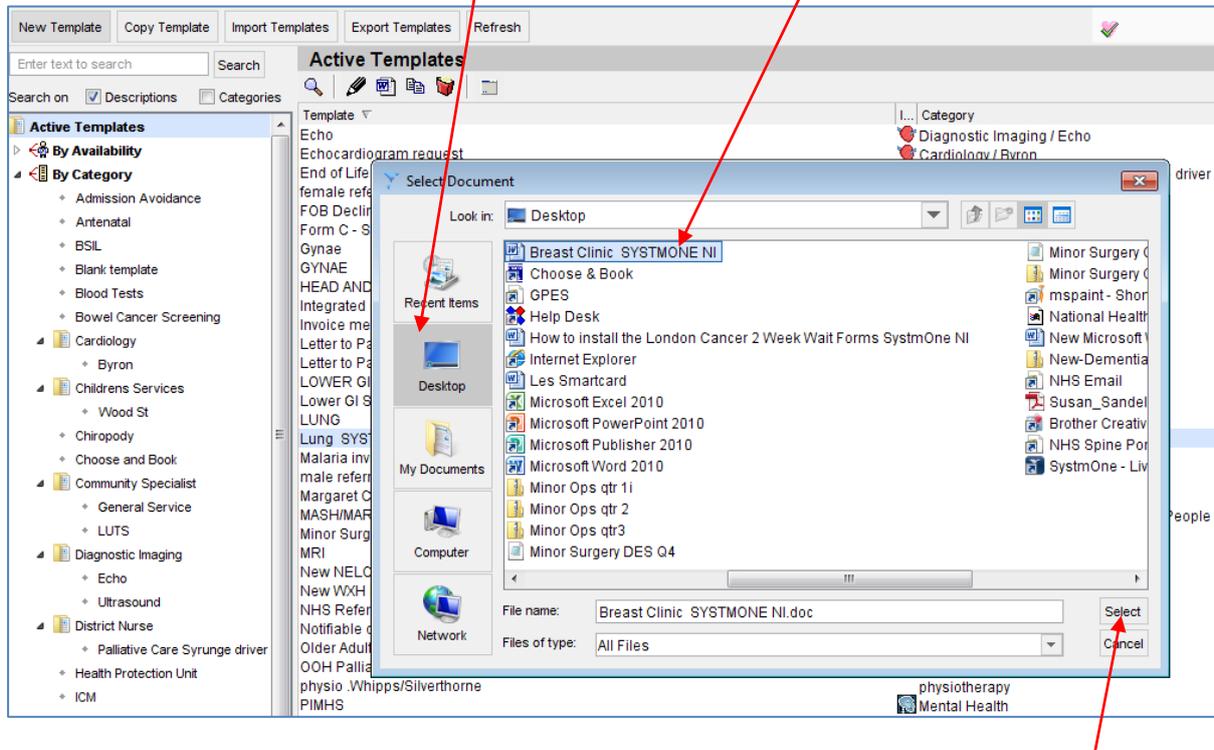
Finally, import the document you have chosen by clicking on the button labelled **Select**.

SystmOne will display a dialog box advising you that it is importing the document (see picture, below).
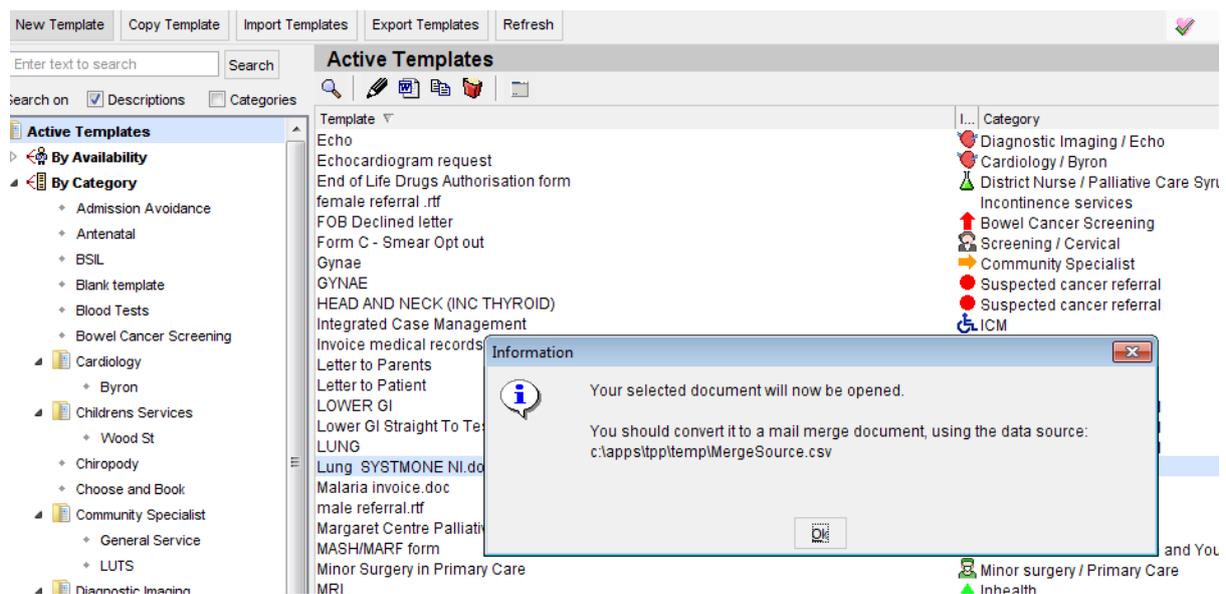
7. The form will be opened in Microsoft Word. Please note that SystmOne gives the imported document its own name for internal reference purposes.

For example, the original file name of the document imported in the above example was Breast Clinic SYSTMONE NI.doc.

However, when it is imported into SystmOne it displays a different document name.
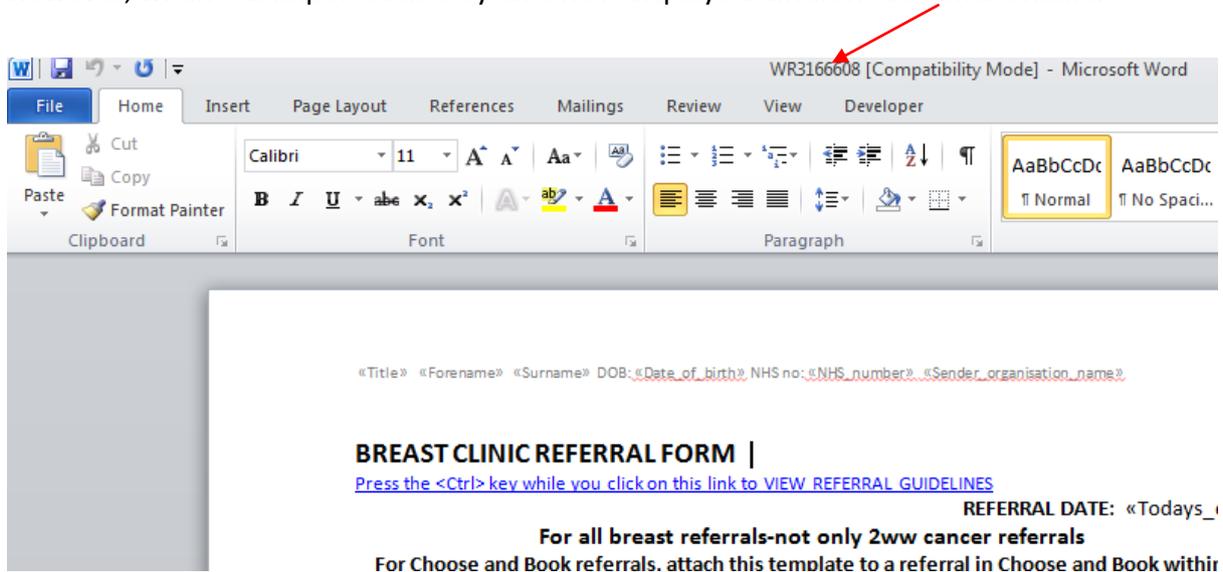
This is nothing to be concerned about. When you eventually save the document, subsequent to importing it (discussed below), SystmOne remembers the original document name and allows you to save it under that name.

8. However, before you do this you need to select the mail merge **data source**.

Click on the tab labelled **Mailings** on the Word ribbon menu
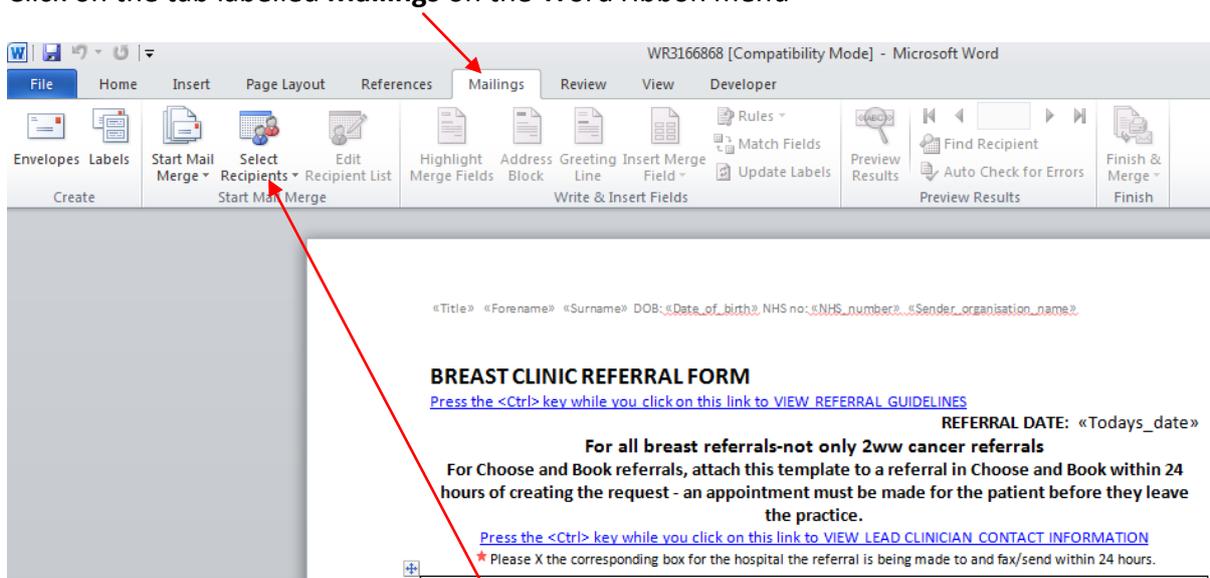
Next, click on the button labelled **Select Recipients**.
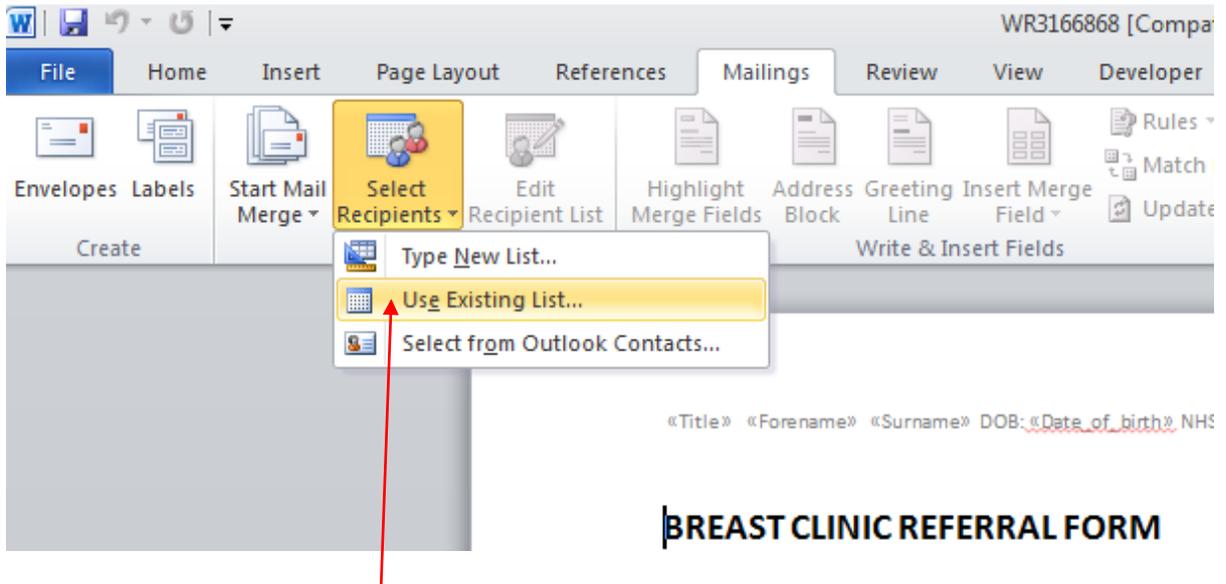
Select menu option **Use Existing List** (see picture, above).

This displays the Select Data Source dialog box (see picture, below).
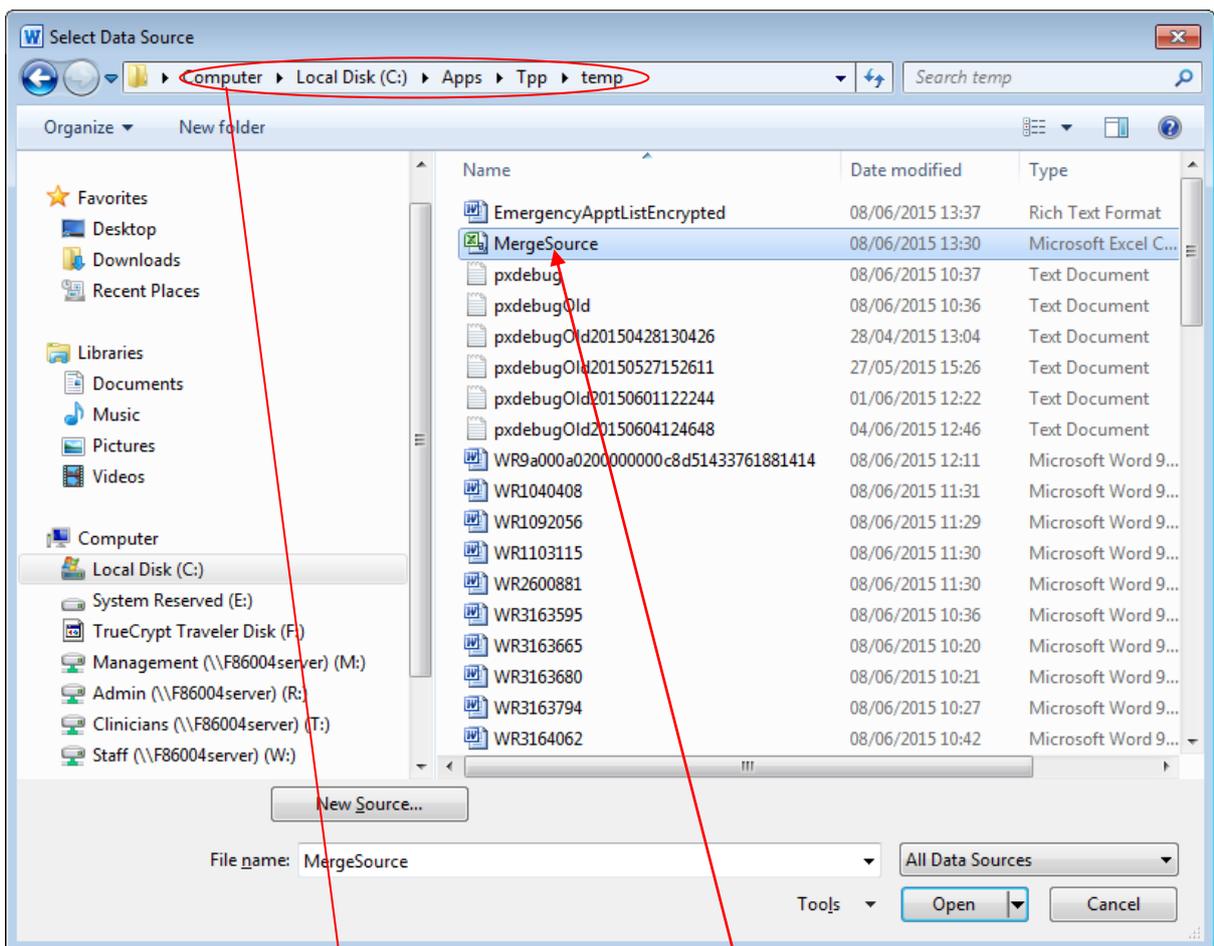
Locate the file named **c:\Apps\TPP\Temp\mergesource.csv**. Select it from the list in the right hand pane by clicking on it once.

This highlights your selection and also displays the name of the data source (*MergeSource* in the **File name** text box, at the bottom of the dialog box (see picture, below)
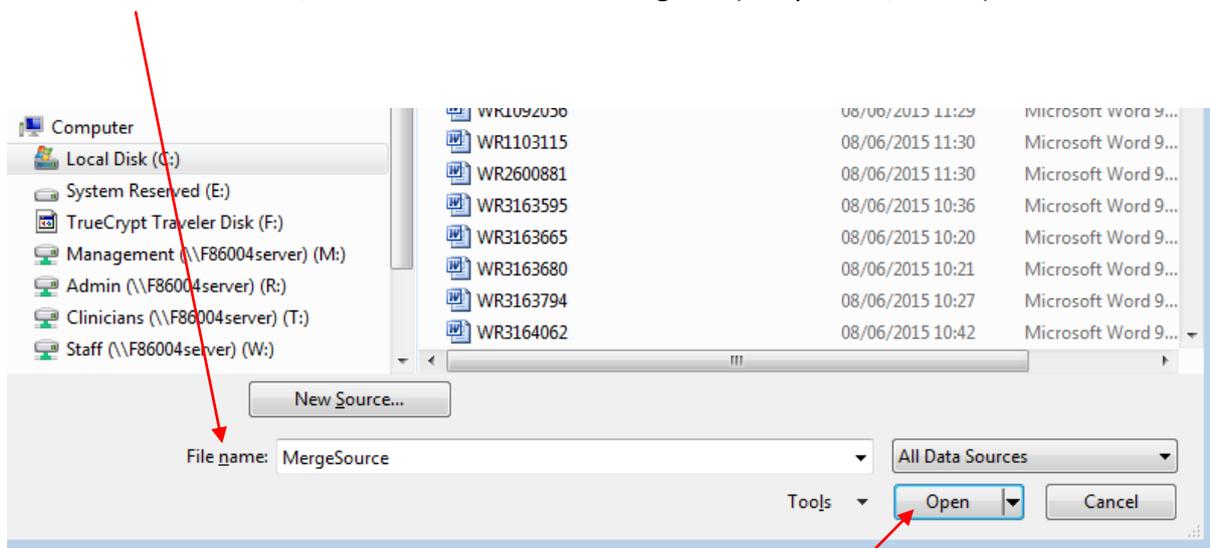
Having done this, you can now click on the button labelled **Open**.

When you do this, the other buttons on the **Mailings** ribbon menu, which were previously **inactive and greyed-out** (see picture, below) now become active buttons.
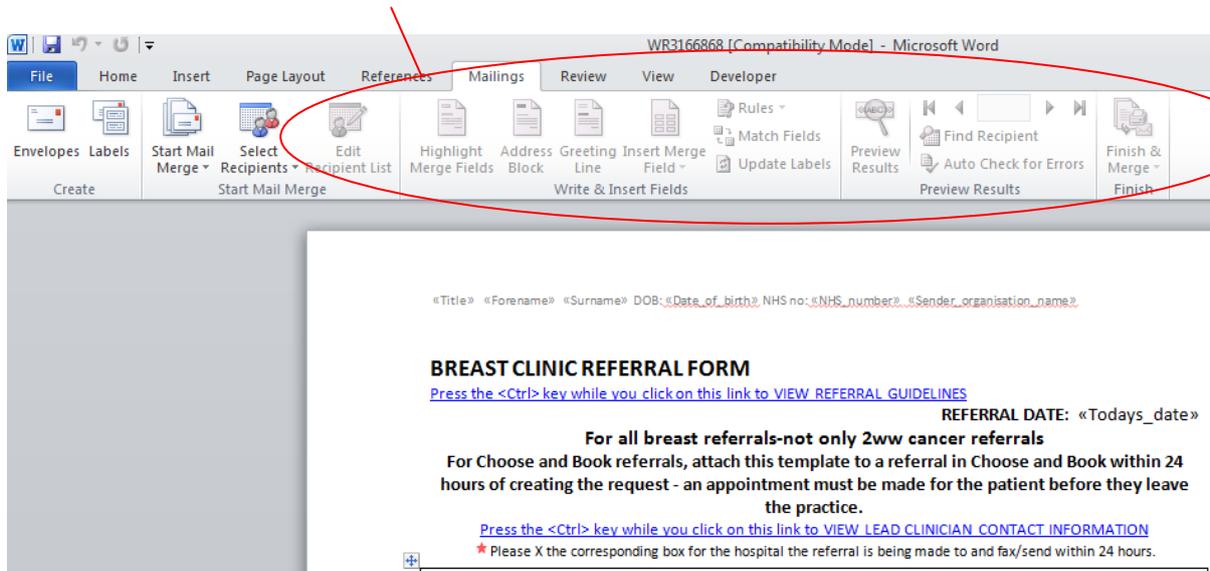
These will now respond to mouse clicks (see picture, below)
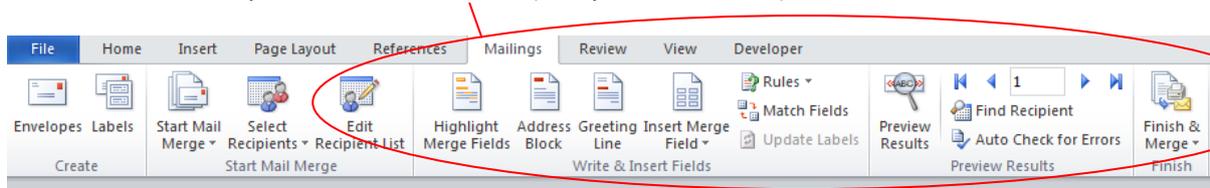
9. Before you finally save the imported document, you need to make sure that the mail merge fields display without field markers.

Mail merge fields are special portions of text which are replaced with data from patients' records.

These are bounded by chevrons **<< >>** (see picture, below).

PATIENT DETAILS
SURNAME: «Surname» FIRST NAME: «Forename» TITLE: «Title»
GENDER: «Gender» DOB: «Date_of_birth» NHS NO: «NHS_number»
ETHNICITY: «Ethnicity» LANGUAGE: «Main_spoken_language»
★ ☐ INTERPRETER REQUIRED   ★ ☐ TRANSPORT REQUIRED
PATIENT ADDRESS: «Patient_address__single_line»
★ DAYTIME CONTACT☎:
HOME☎: «Patient_home_telephone_number» MOBILE☎: «Patient_mobile_telephone_number» WORK☎: «Patient_alternate_telephone_number»
★ EMAIL:

These mail merge fields will be replaced by the relevant details from the patient's record. In order for this to be displayed, however, the chevron boundary markers need to be hidden.

This is done by clicking on the button marked **Preview Results**, which is located on the **Mailings** ribbon menu
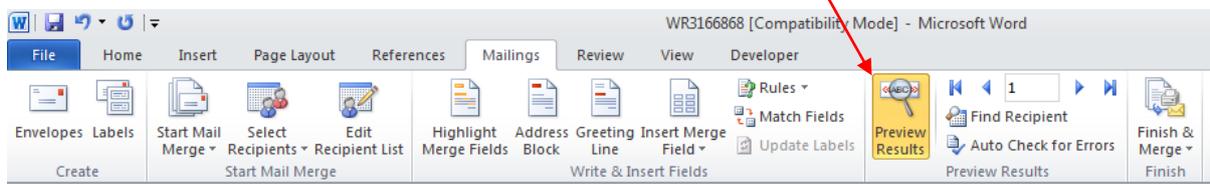
The **Preview Results** button remains highlighted, indicating that the chevron boundary markers are now hidden (see picture, below).

PATIENT DETAILS
SURNAME: Surname FIRST NAME: Forename TITLE: Title
GENDER: Gender DOB: Date of birth NHS NO: NHS number
ETHNICITY: Ethnicity LANGUAGE: Main spoken language
★ ☐ INTERPRETER REQUIRED   ★ ☐ TRANSPORT REQUIRED
PATIENT ADDRESS: Patient address - single line
★ DAYTIME CONTACT☎:
HOME☎: Patient home telephone number MOBILE☎: Patient mobile telephone number WORK☎: Patient alternate telephone number
★ EMAIL:

Make sure the chevrons are hidden before you save the document.

Microsoft Word will then close and you will be prompted with the SystmOne **Word Letter Template** dialog box.

This allows you to give the template a more memorable name. However, SystmOne remembers the original name of the file (see picture, below).
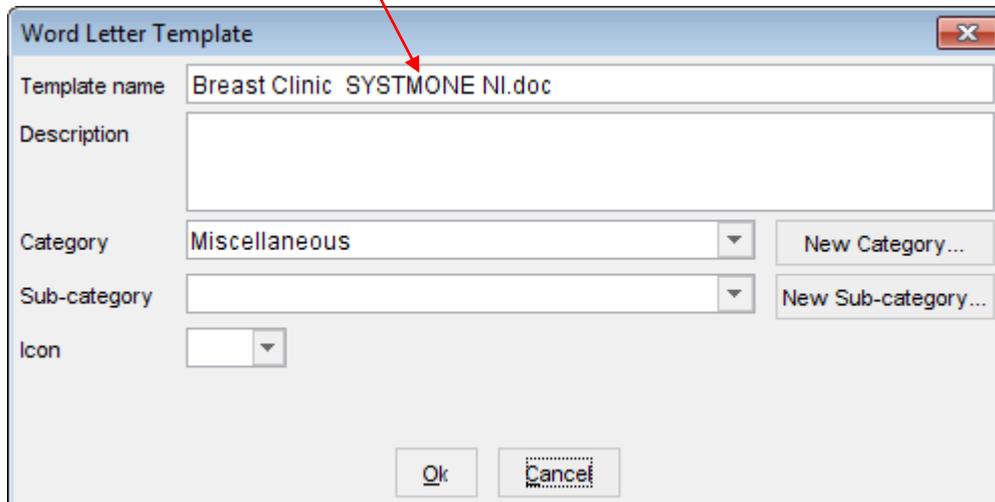
Please note that be default, all forms are stored in the **miscellaneous** category.

The category dictates the folder in which the forms are stored.

The **categories** are shown in the **New Word Templates** screen in the left hand pane.
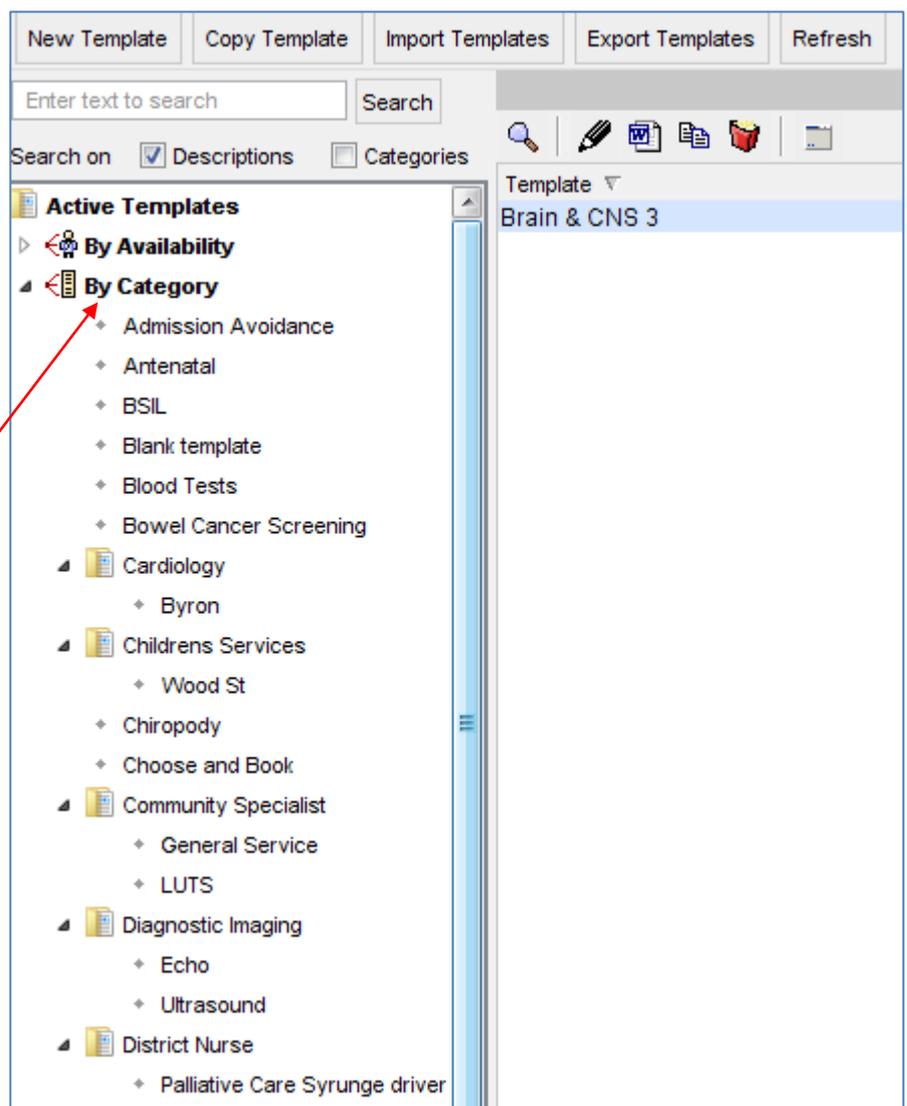
It is best to store all the Pan London Suspected Cancer Referral templates in one category folder.

To create a new folder, click on the button labelled **New Category** in the Word Letter Template dialog box.
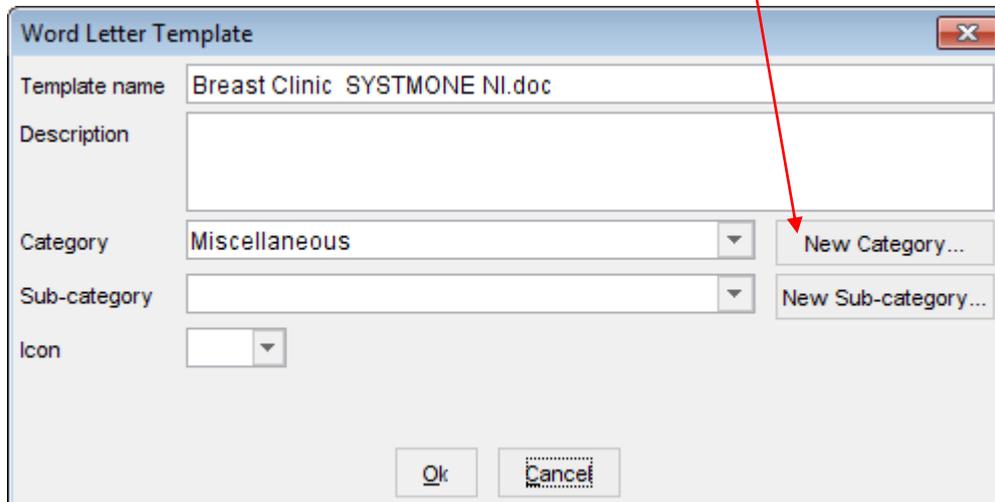
Another dialog box will open up allowing you to create the Pan London Suspected Cancer category by typing into the text box labelled **Category name**.
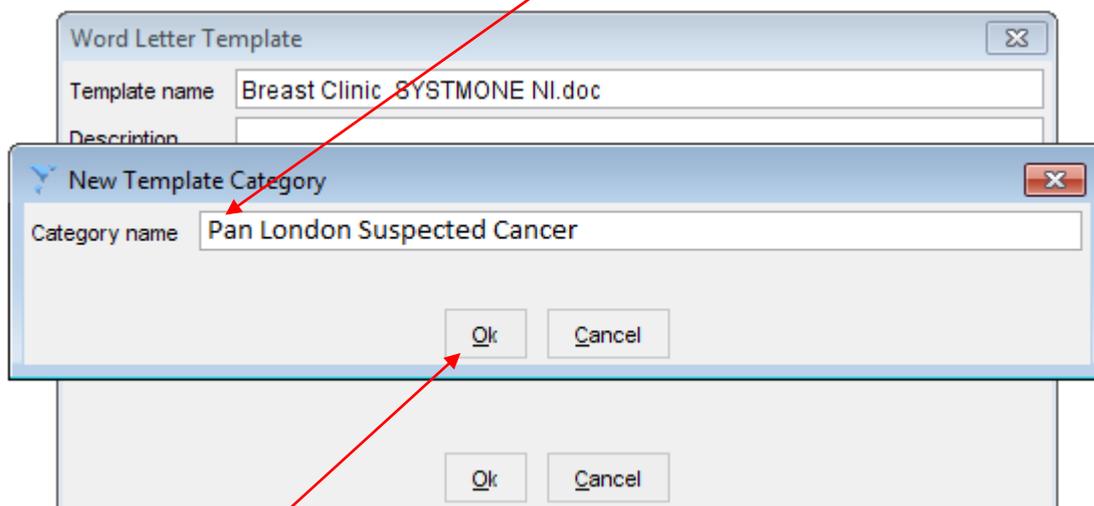
Click on **OK** to save the new Category.
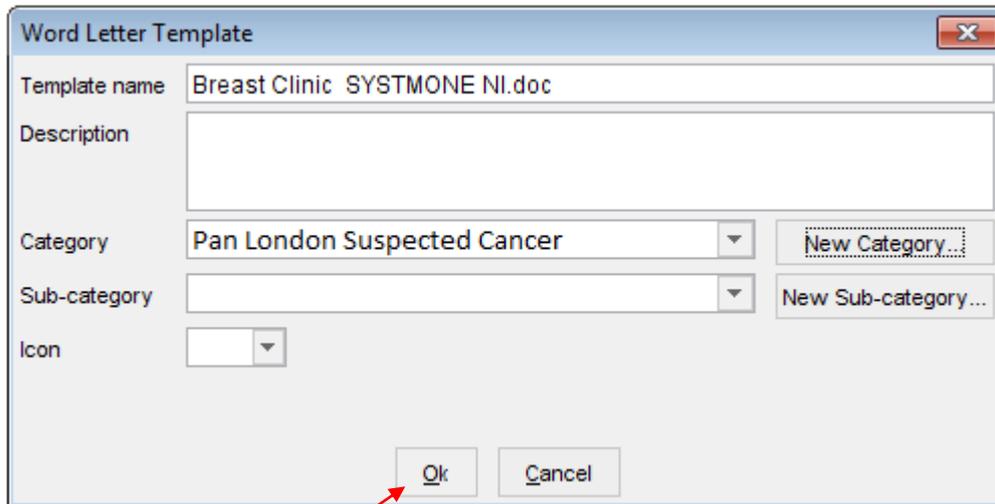
You can now click on **OK** to save the template under the category Pan London Suspected Cancer (see picture, below).
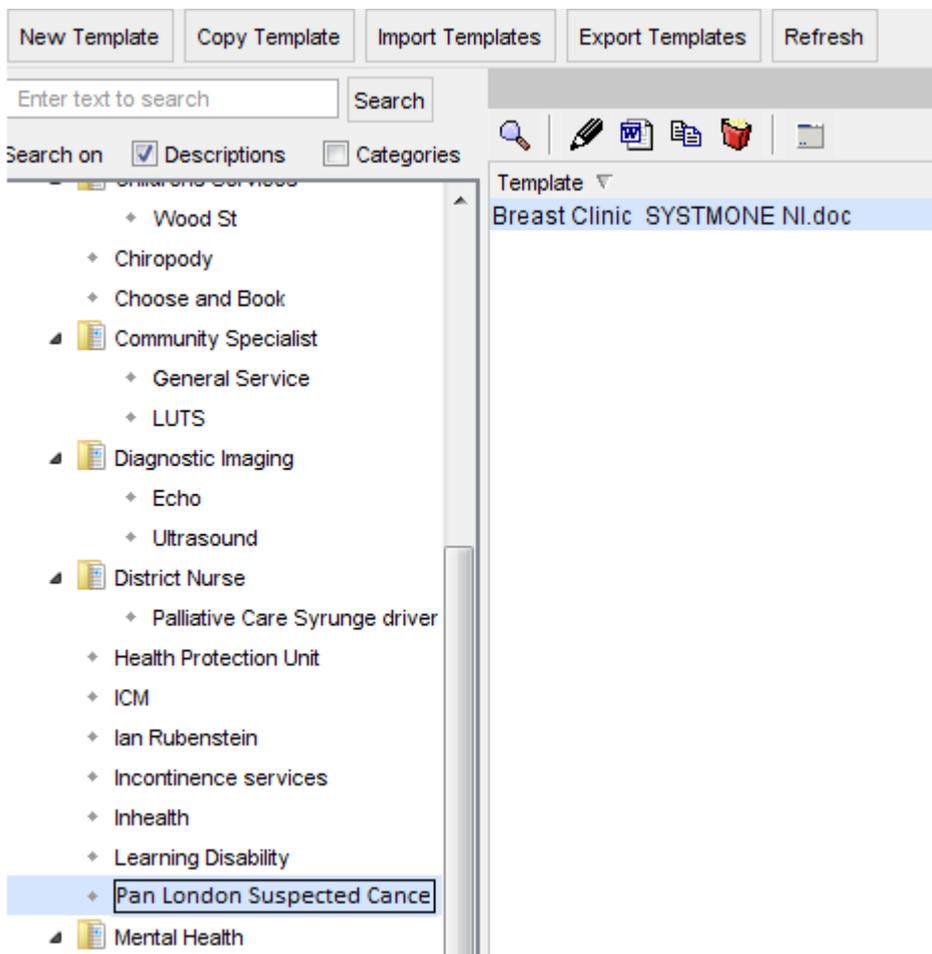
Your referral template is now ready for use.

Altering a form

You will need to alter the form's word letter template because SystmOne 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.

Adding this to the word letter template means GPs do not have to type it each time they make a referral.

How to open a form so that it can be amended…

1. Go to the **New Word Letter Templates** screen (see below).
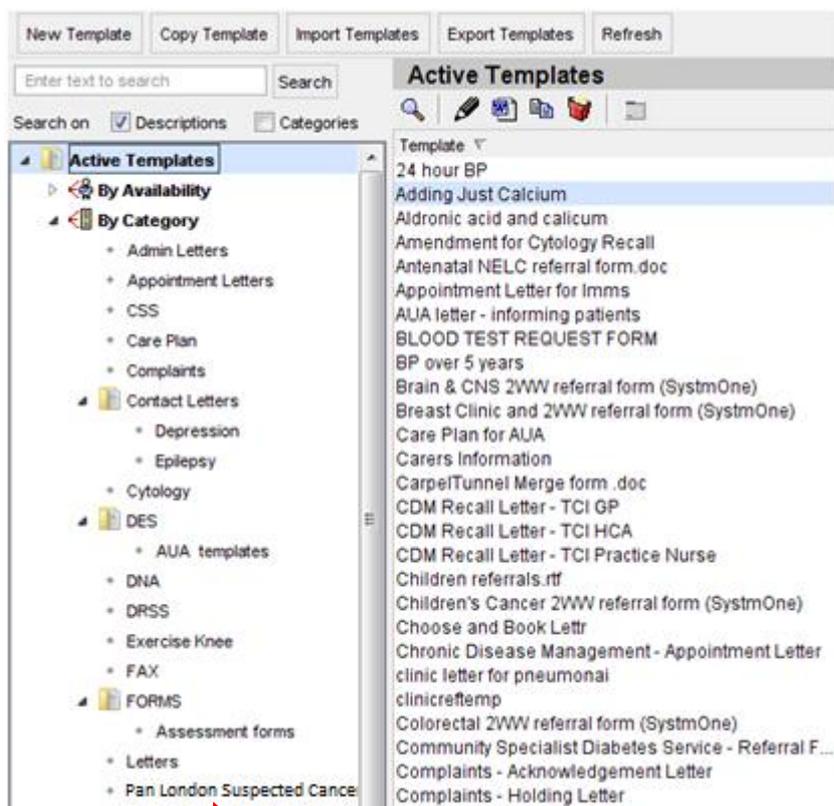
2. Click on the **Pan London Suspected Cancer folder**.

3. The right hand pane displays a list of installed Pan London Suspected Cancer Referral forms (see below).
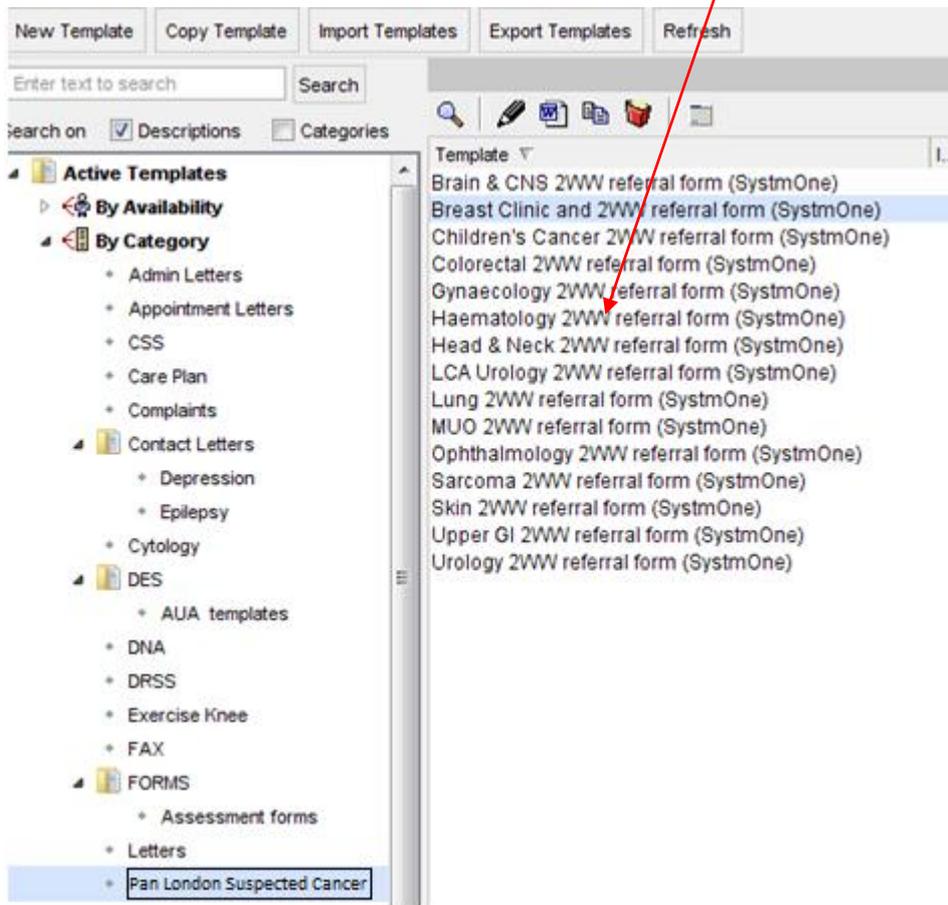
4. Right click on the form you wish to alter and choose menu option **Amend Document** (see below)
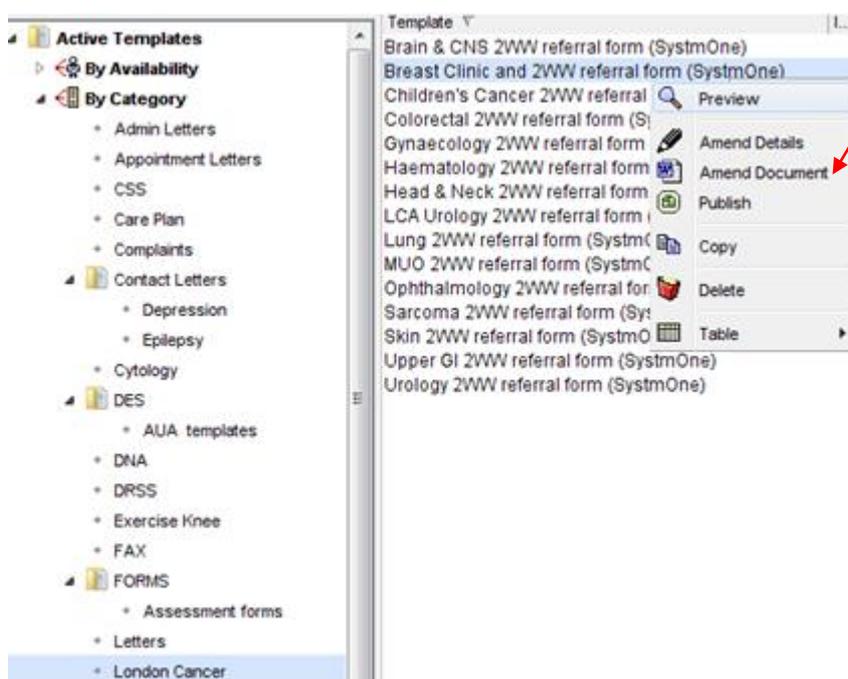
5. The form you have selected for editing will open up in Microsoft Word and you will be able to make any changes you wish.

Please note that whenever you open a document for amending you will be shown the following dialog box.
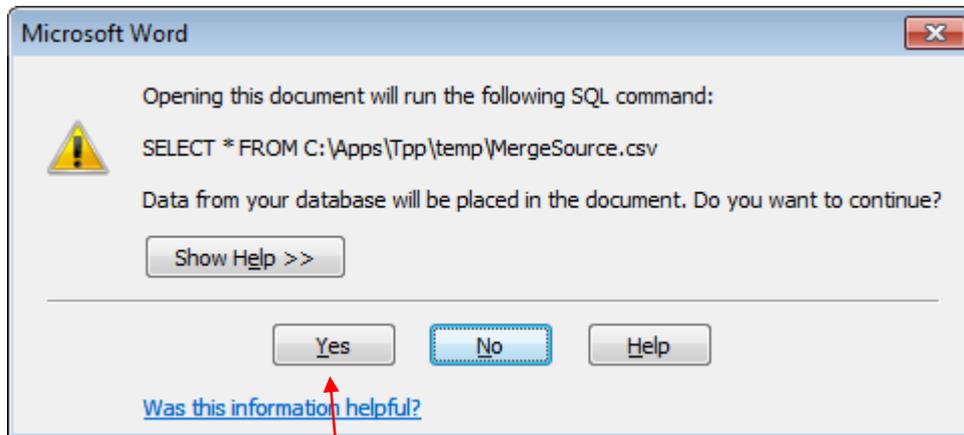
Make sure you click on **Yes**.

How to alter information on the form…

This is best illustrated by a practical example.

1. The commonest thing you will need to alter is to add the surgery bypass telephone number to the form. This is the surgery's private telephone number that is not given to patients.

You have to do this manually because SystmOne does not have a mail merge field for this.

Click once on the text box to the right of **BYPASS**☎ to highlight the text entry box.

Do not type directly over the box. This box is potentially machine-readable (with appropriate software installed) and typing over the box disables this function.

GP DETAILS		
USUAL GP NAME: Usual doctor		
PRACTICE NAME: Sender organisation name	★**PRACTICE CODE:** Registered GP practice ID	
PRACTICE ADDRESS: Sender address building, Sender address road, Sender address locality, Sender address post town, Sender address county, Sender post code		
★**BYPASS**☎:		
MAIN☎: Registered GP phone number	**FAX:** Registered GP fax number	★**EMAIL:**
REFERRING CLINICIAN: Sender name		

Instead, having highlighted the box, double-click on it. This displays the **Text Form Field** options dialog box (see picture, below).

Type the phone number in the text box labelled **Default text**.

Click on the button labelled **OK.**

The telephone number is now transferred to the form.

GP DETAILS
USUAL GP NAME: Usual doctor
PRACTICE NAME: Sender organisation name ★**PRACTICE CODE:** Registered GP practice ID
PRACTICE ADDRESS: Sender address building, Sender address road, Sender address locality, Sender address post town, Sender address county, Sender post code
★**BYPASS**☎: 01992 718 7183
MAIN☎: Registered GP phone number **FAX:** Registered GP fax number ★**EMAIL:**
REFERRING CLINICIAN: Sender name

You can now save your imported form. This will happen automatically when you attempt to close the imported word document.

You will be prompted to save the form (see below)

Microsoft Word

⚠ Do you want to save changes you made to WR3166868?

If you click "Don't Save", a recent copy of this file will be temporarily available.

Learn more

Save   Don't Save   Cancel
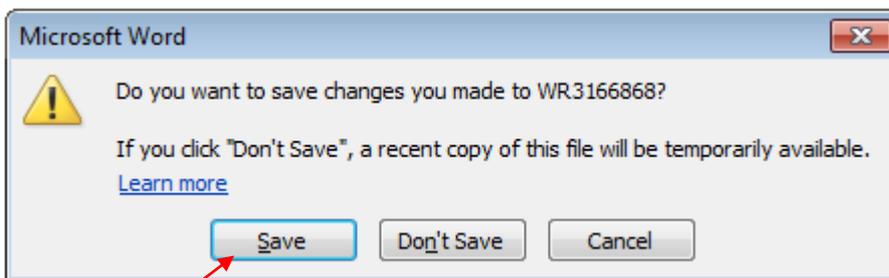
Click on **Save**.

2. Other text areas can be freely altered by directly typing over the text. This applies to hospital names, telephone numbers and text in the clinical details section of the forms.

Please do not type over the mail merge fields as this will prevent them from working.

When you close the document you will be prompted to save any changes you have made.

Displaying a form when making a referral

You must be in a patient's medical record in order to make a referral using one of the Pan London Suspected Cancer Referral forms (see picture below).

To make a referral, **right-click** with the mouse on **Referrals** in the left-hand pane.

Then choose menu option **New Word Referral** from the menu which appears.

Before you can choose the word letter template, you have to give SystmOne some details about your intended referral. This is done via the next screen (see below).

At the very least SystmOne will expect you to have filled in *some* of the **recipient's details**.

You must also provide the appropriate **Read code** for the referral.

Choose the **word letter template** required by clicking on the button marked **Choose Template**.

Finally, to display the form click on the button marked **Write Now**.

How to produce a referral form for your patient

Make sure you have read the section **Displaying a form when making a referral** (hold the control key down while you click here to review this information). This shows you how to create a referral form within a patient's medical record.

Unfortunately, text boxes and check boxes do not work properly in the non-integrated Word version of SystmOne.

TPP advise that all SystmOne users should migrate to the integrated version. The Transforming Cancer Services Team for London has released separate forms for the integrated version of SystmOne, should you wish to migrate to the latest version. If you decide to keep with the non-integrated version of Word you have **two options** to work around this limitation.

Method One
This is most probably what you do already, if you have ever had to use a form which contains check boxes or text boxes.

Check boxes
Double-click on the check box you wish to check.

The Check Box Form Field Options dialog box will appear (see picture, below).

The default value is **Not checked**.

Change the **default value button** to **Checked** by clicking on it. Then click **OK**.

Text boxes

Highlight the text box. Then double-click on it to open the Text Form Field Options dialog box.

Enter the required text in the **Default text** box. Then click **OK**.
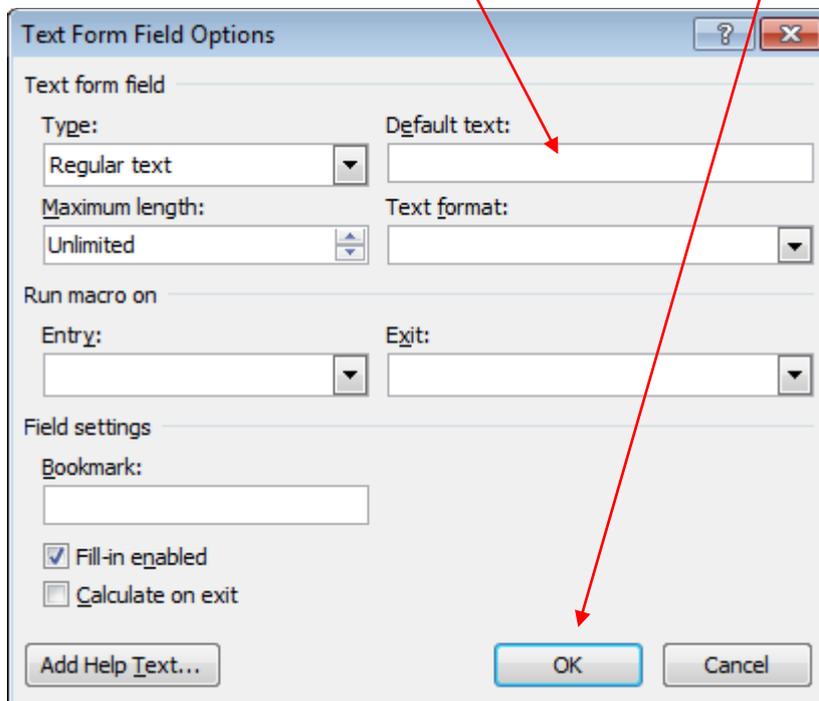
Method Two

This enables you to use the text boxes and check boxes directly ,as you would expect. Unfortunately, the non-integrated version of SystmOne does not make this easy, though it is certainly possible.

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

1. 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**.
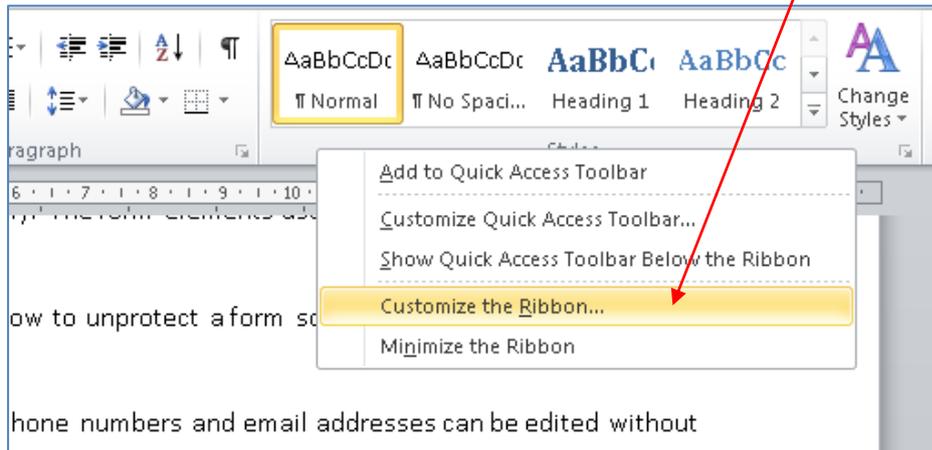
You will be presented with the window shown below.
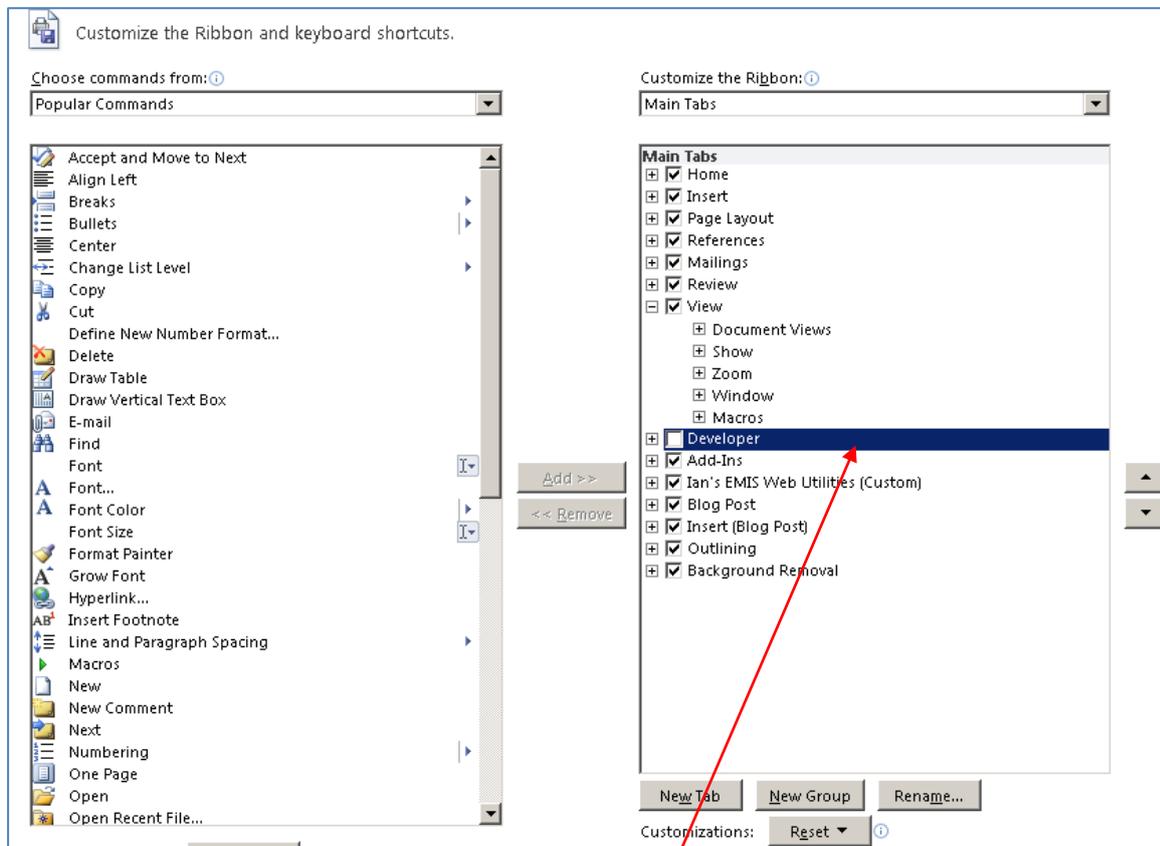
2. The box to the right of this screen allows you to customise the ribbon. Highlight the **Developer** option. Enable the **Developer tab** by clicking on the small check box with the mouse.

3. Next, close this window by clicking on the button labelled **OK,** located at the bottom-right of the window.
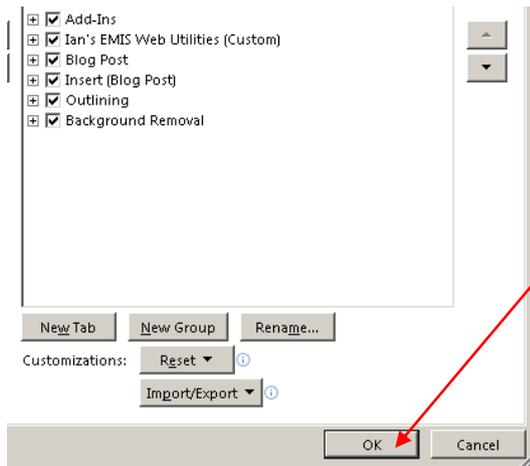
4. The **Developer** tab has now been enabled in Microsoft Word on your computer (see picture, below)
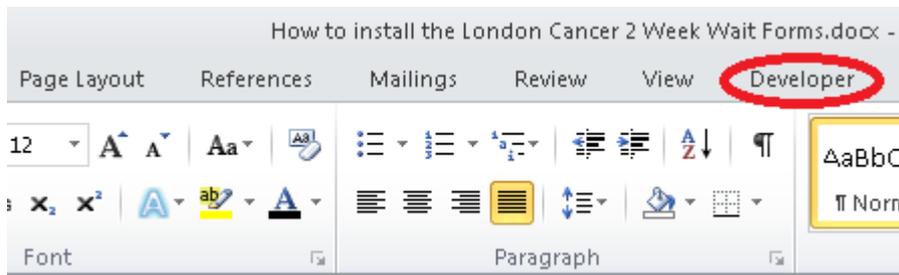
5. Click on the **Developer tab** (ringed in the picture above) to display the **Developer** ribbon menu (see picture, below)
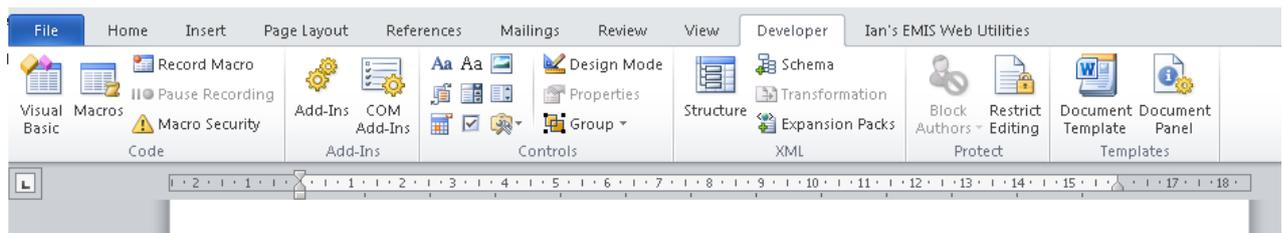
Having enabled the Developer tab, you can now use this to activate check boxes and text boxes on the Pan London Suspected Cancer Referral forms.

You now need to activate the check boxes and text boxes...

1. Use the word document template to create a referral letter from within the patient's medical record.

2. When the form containing the patient's details opens up in Word, click on the **Mailings** tab.
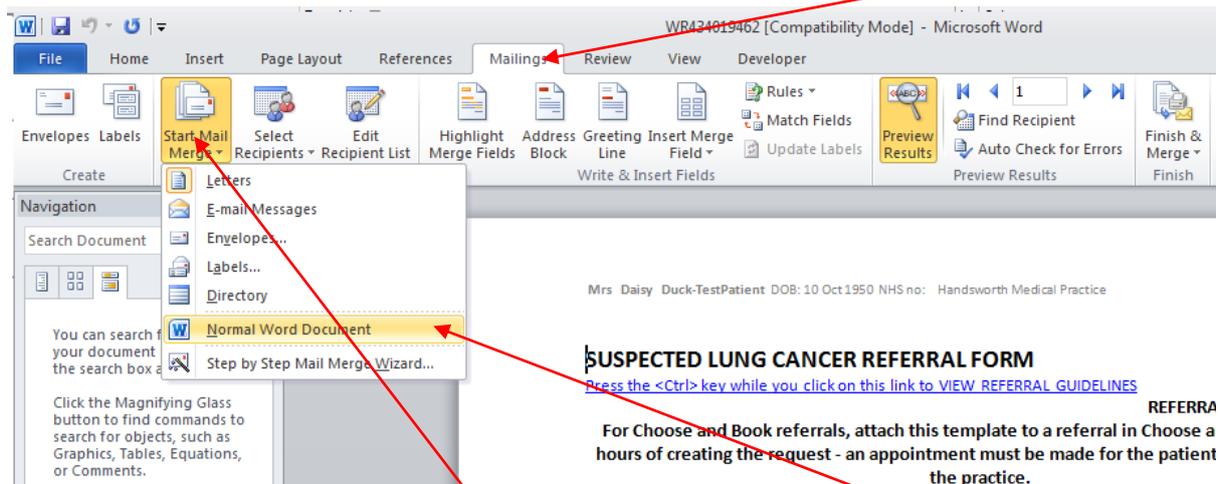
3. Then click on the button labelled **Start Mail Merge** Then select **Normal Word Document**.

3. The click on the **Developer tab**.
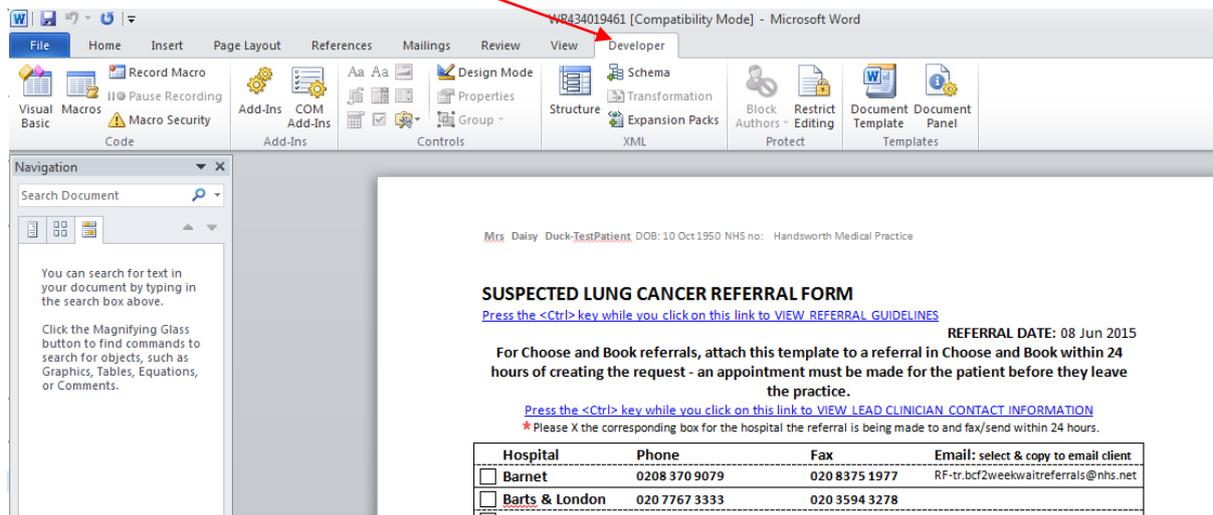
4. Then click on the button labelled **Restrict Editing** (see picture, below).
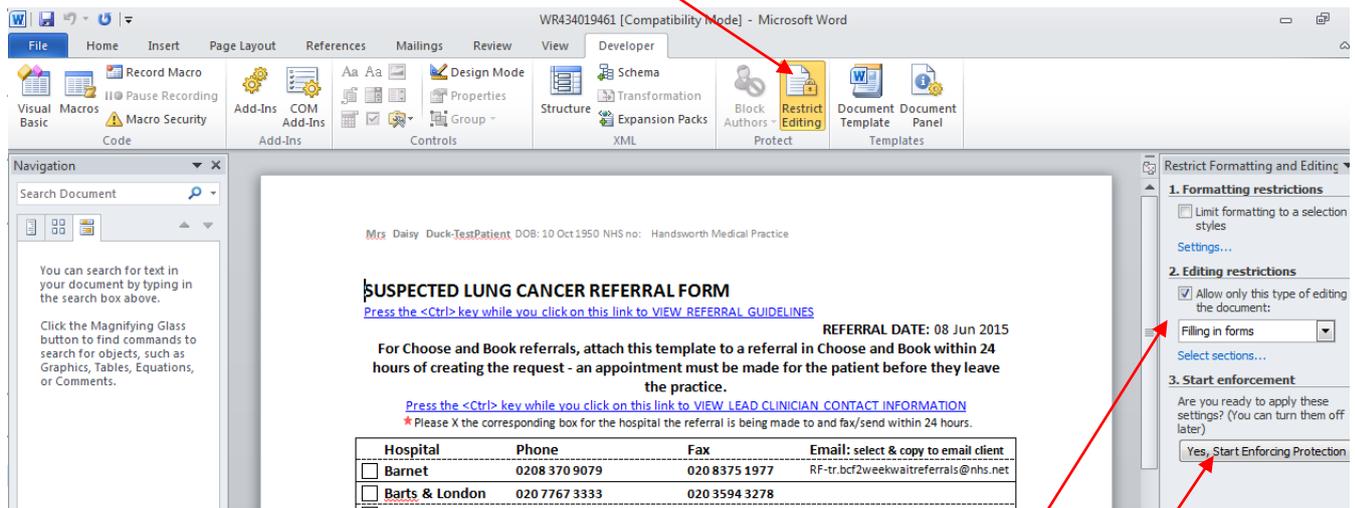
5. The **Restrict Formatting and Editing pane** is displayed to the right of the document.
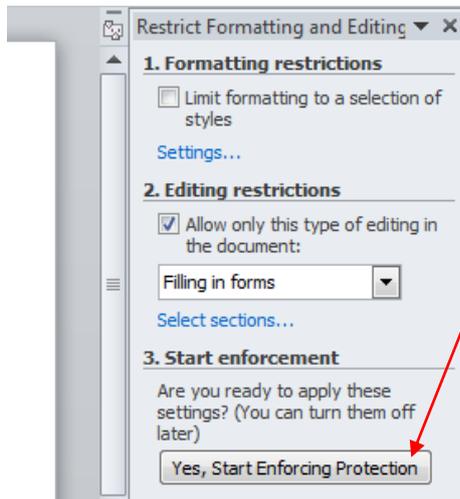
6. Click on the button labelled **Yes, Start Enforcing Protection**

7. Check boxes and text boxes will now work normally. Please note that the Pan London Suspected Cancer Referral forms are **semi-protected,** which means you can use **form elements** such as check boxes and text boxes but still alter most of the text in the document.

Selecting a hospital

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).
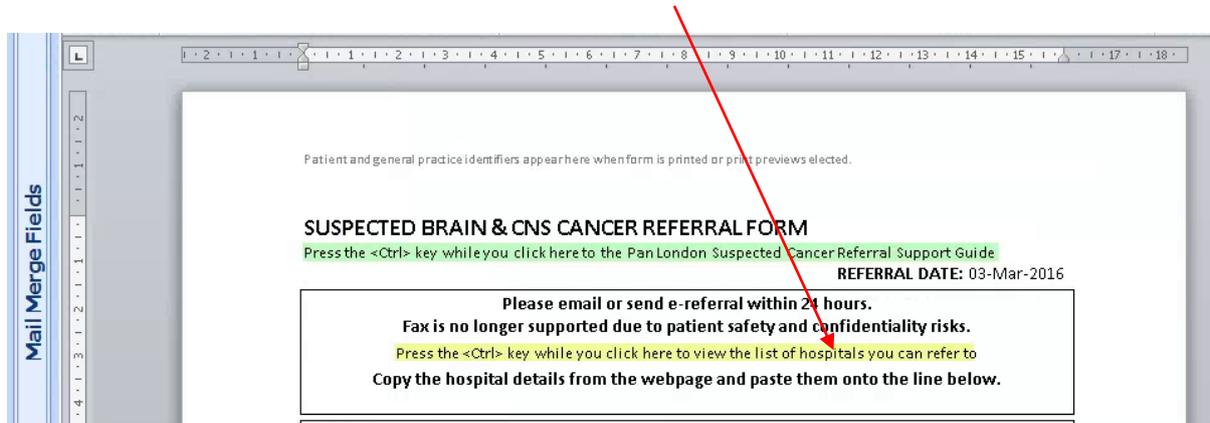
The list will be opened in your browser. What you see depends on the capability of your browser.

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)
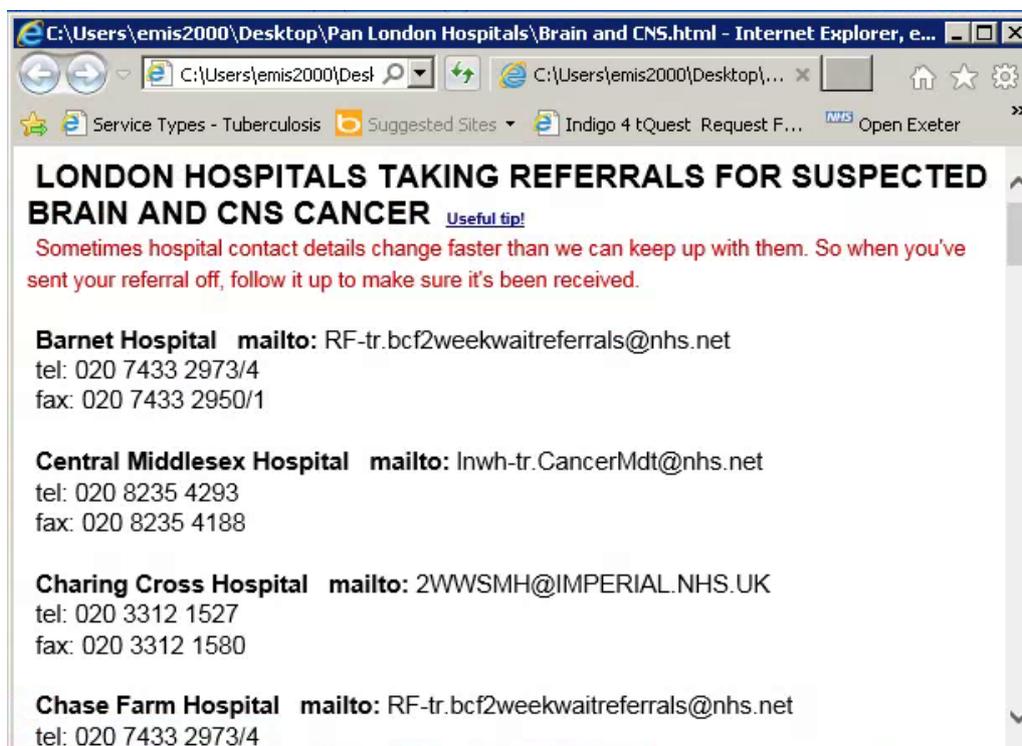
Using the mouse, select the hospital you wish to refer the patient two by clicking to the left of the hospital name, holding the left mouse button down and dragging the mouse the right to select the entire line (see picture, below)

Having selected the entire line, right-click with your mouse and choose menu option **Copy** from the pop-up menu (see picture, below).
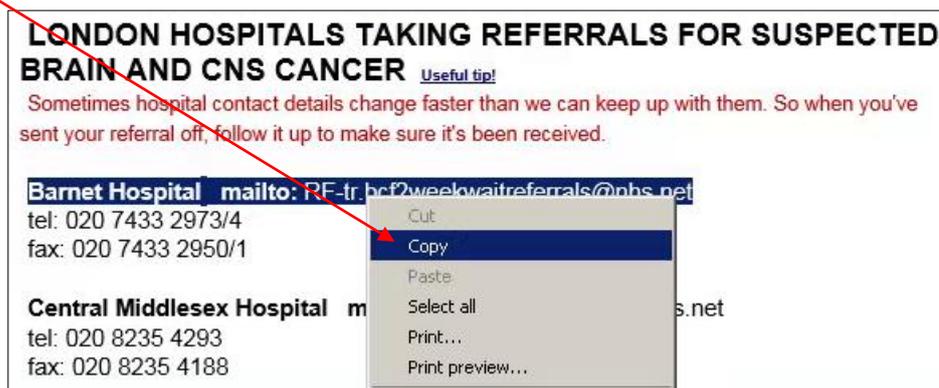
You can now close your browser down and **return to the form**.

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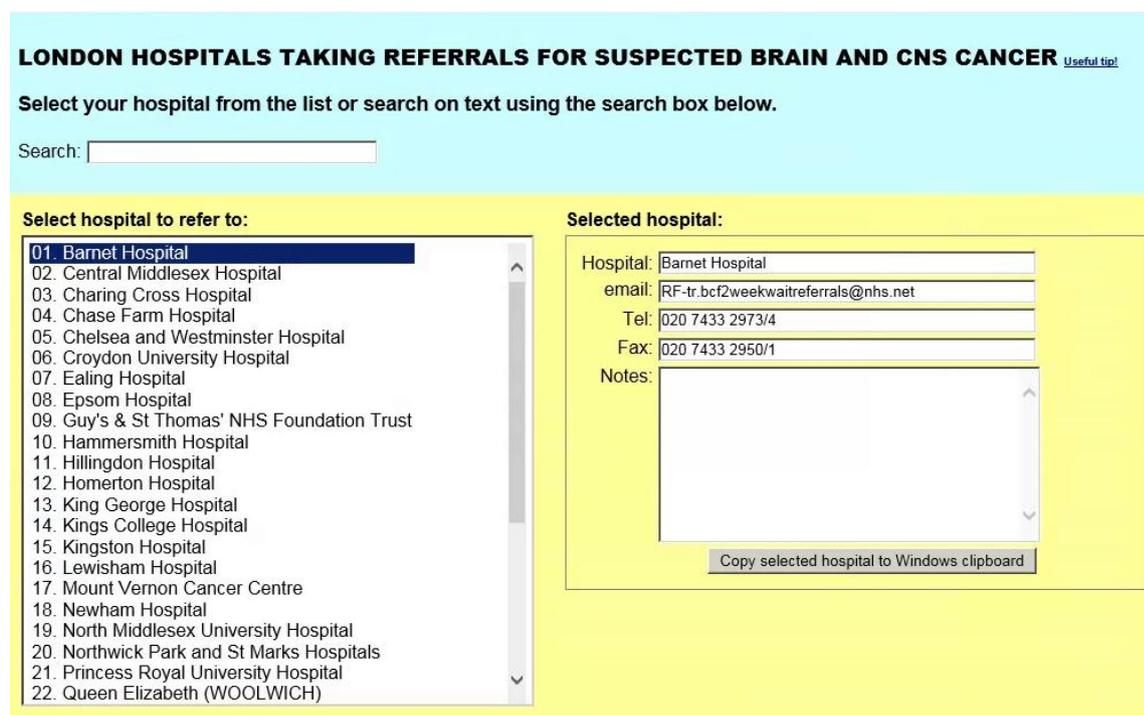
Select the hospital you wish to refer the patient to from the list on the left hand side of the screen (see picture, left).

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).
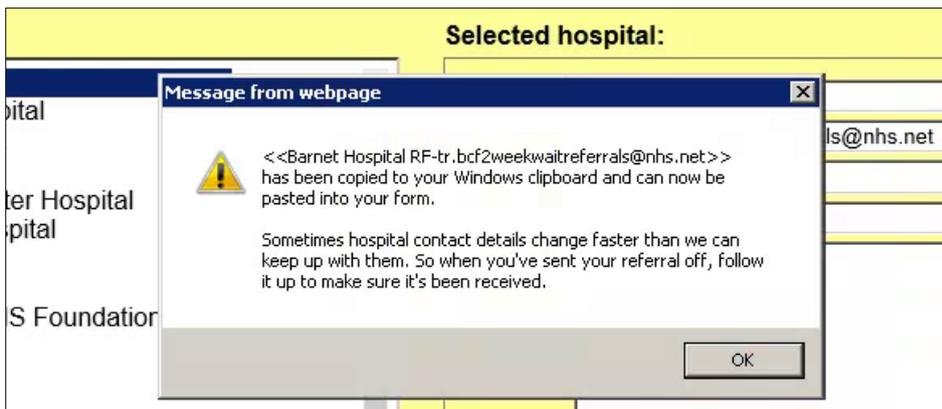
Having copied the required details and depending on the capability of your browser, you may be offered the option to close the current tab.
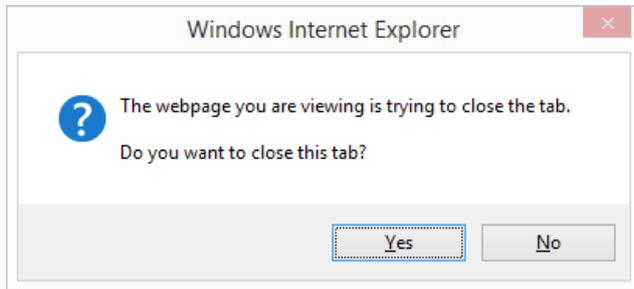
If you select Yes, and there are no other tabs open in your browser, the browser will close and you will return to your referral form. If there are other tabs open, you will need to return to your referral form manually.

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)...
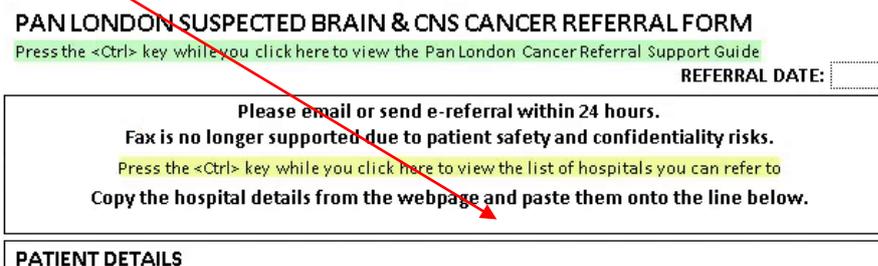
...and select the **first choice** from menu option **Paste Options**: from the popup menu (see picture, below)
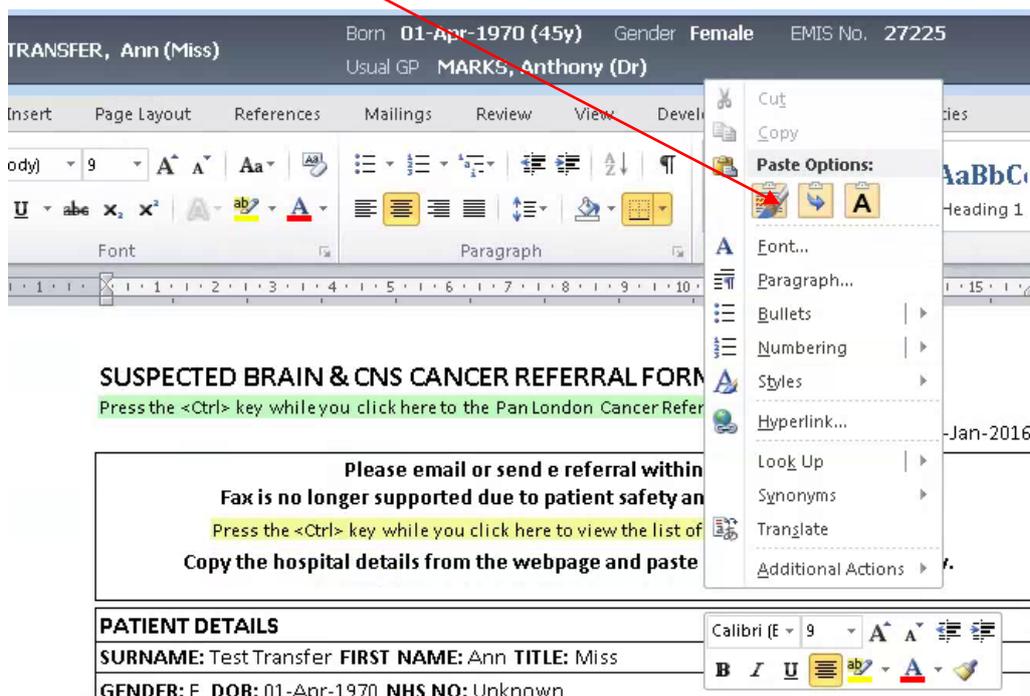
You can achieve the same result by pressing the keyboard combination **Ctrl + V**.

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

Local circumstances will dictate how you send the document via email. Whichever email client you are provided with, 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.