Working with GP Proformas produced by the OCCG

Background

In 2009, the GP Proformas Team was founded in order to bridge the gap between the service providers, who were increasingly circulating dedicated referral forms in order to improve the quality of the referral information they were receiving, and the Primary Care teams who were using them and facing a bewildering array of forms.

Primary Care, represented by the LMC, made the decision that all new referral forms produced should be digitised with automatic electronic 'fields' where GP IT systems would at the very least fill in the core patient details such as name, date of birth and telephone number in order to offset the burden of form filling.

Since then, the increasing experience of the GP Proformas Team has helped to establish good relationships with community services, and increasingly intelligent form design. This aims to maximise the use of automation in providing the core information required by services, and to assist referrers in finding the correct pathway by linking the referral process to current guidelines for treatment and referral.

In 2014, the Proformas Team is working closely with the new software platform DXS to try and minimise the burden on practice IT administrators in maintaining their database of forms; and, when the upgrade of GP computer software is complete, to start making use of the extra functionality to further improve the efficiency of the forms.

It should be noted that the DOH announced in early 2014 that the NHS "must be paper free by 2018". Our increasing emphasis is on ensuring the forms are fit for fully digital completion and transmission to service providers. We expect that email will become the preferred medium for referrals that are not sent via Choose & Book, noting that the NHS.net digital fax service has been decommissioned and is scheduled to close down in April 2015.

As a team, we are very keen to have feedback from both referring staff on how effective the form design is, and the services receiving completed forms. In the first instance please email us here with comments, and indicate if you would like a personal reply.

This document is designed to answer some of the common questions and issues service users face.

Yours faithfully

The GP Proformas Team
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Managing Proformas in EMIS Web

Importing proformas into EMIS Web

EMIS Web stores both document templates and the documents they produce in Rich Text Format (.rtf).

Referral proformas should normally be downloaded in EMIS Web Document Template (.ewdt) format, because these forms are more than just a document – they often contain READ codes carefully selected by us; AND keywords which will speed staff in locating the forms.

EWDT files are best thought of as a 'link' as they are not in themselves a file. When they are imported, 'your' EMIS Web will communicate with the source document used by the OCCG and take a copy directly. It will not, however, update the form when the OCCG source is updated, as it is a copy made in 'your' EMIS Web at the time you import it.

Access Template Manager

1. Download .ewdt templates into a windows folder on your computer
2. From the EMIS Bubble, navigate to "Configuration – Template Manager"
3. Select the Document Templates section of the module, using the tab on the left hand side of the screen
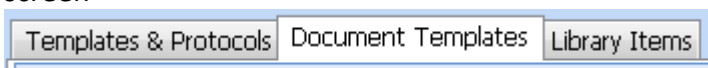

4. Consider using folders within your organisation to categorise the forms for example:
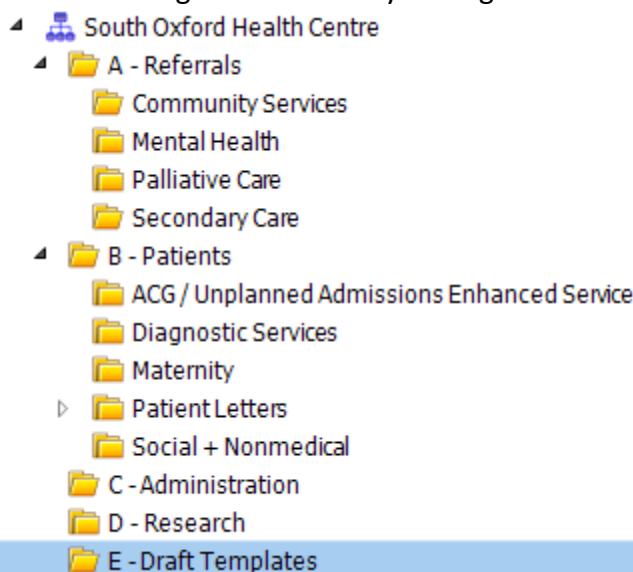
    this can be done by either clicking "Add" from the EMIS Ribbon, or right clicking on a folder and adding folders or subfolders
5. When you have a destination folder selected, click "Import" from the EMIS Ribbon
    a. Selecting "Document" will allow you to import a single template
    b. Selecting "Folder" will allow you to import an entire folder of templates
6. A popup window will allow you to browse to the folder where you stored your templates in step 1 above

a. By default, EMIS Web will expect to import .ewdt files and the box will only display proforma types of the type currently selected in the filter – if your last imported document was a different type, you may need to change the filter near the "Open" button (bottom right hand corner) to "EMIS Web Document Template" using the dropdown menu:
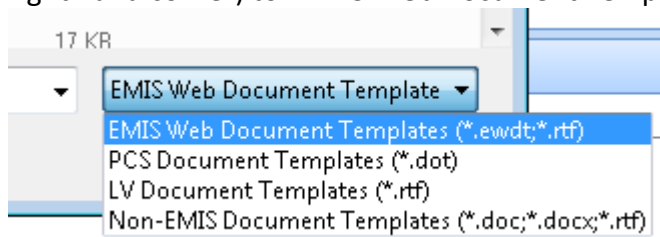
b. You can choose other formats if the template has been generated by a third party and is in a different format, using the selection box above the "Open" box

7. Select the template you want to import and click "Open" (OR double click the template)
8. The template should now be imported and ready to use. If you are given any warnings by EMIS Web please tell us immediately

Modifying OCCG Proformas in EMIS Web

Please let us know of any improvements required or bugs found so that we can edit our master version. That way, everyone benefits and the forms remain consistent.

Enabling unlocking of forms in EMIS Web

In order for checkboxes to function properly and to prevent accidental damage to the form, EMIS Web protects document templates by 'locking' them. At present, our forms are developed to be compatible with Microsoft Word 2003, which requires forms to be locked; but in the near future we hope to start using more advanced forms which will not need to be locked.

In order to unlock the form in Microsoft Word 2010, you will first need to enable the "Developer" tab.

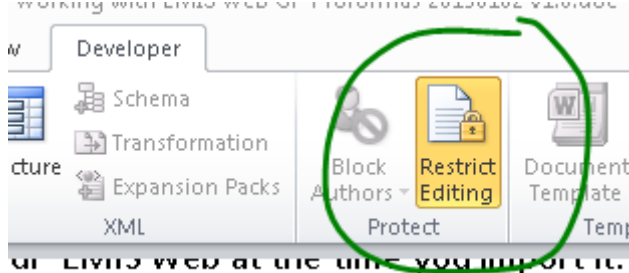1. Open Microsoft Word OUTSIDE of EMIS Web (you must not have an open document in EMIS Web)

2. Click "File – Options and choose the "Customise Ribbon" and add a tick to the box "Developer"
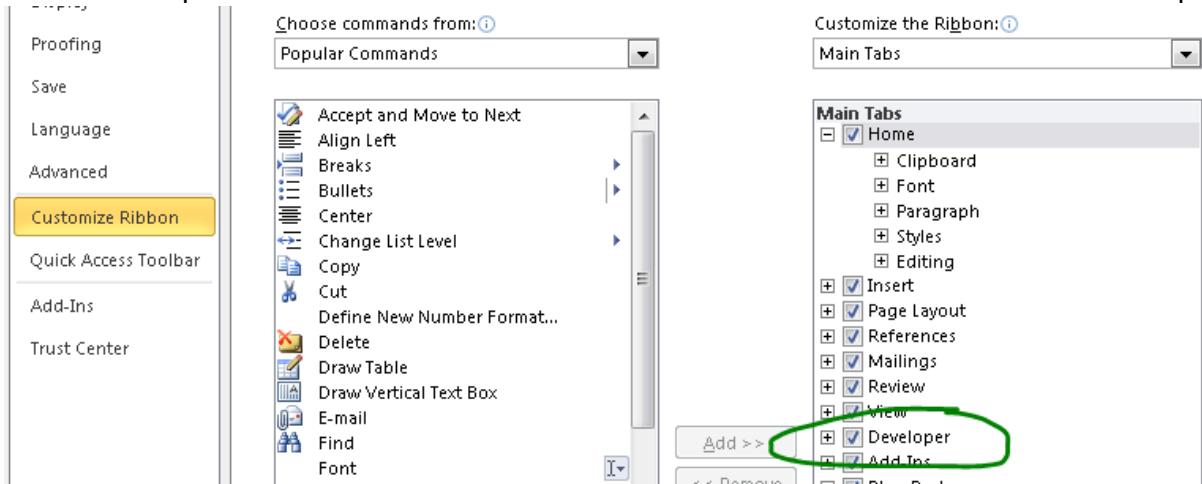
3. You should now be able to see an additional tab called "Developer" at the top of your Word Ribbon:
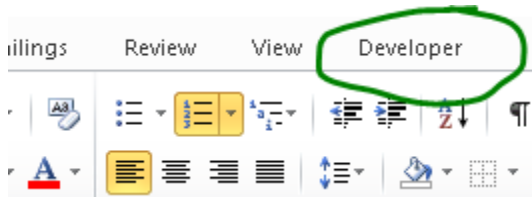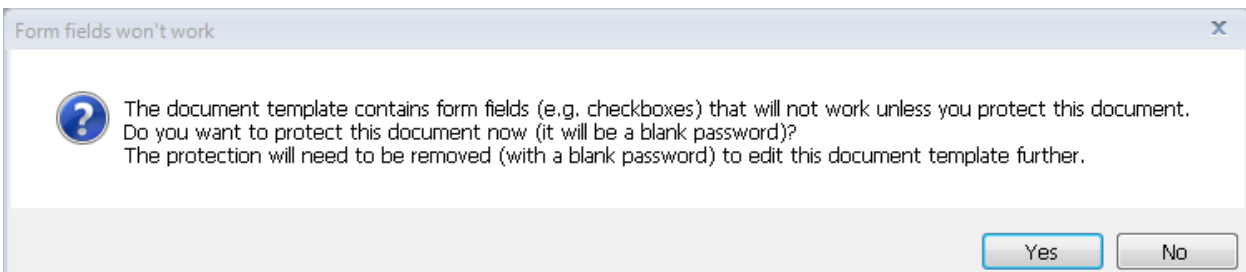

4. From the Developer tab, there is an icon on the Ribbon called Restrict Editing:

5. If you click this box, you will open a new menu on the right side of your screen; find and click the box 'Stop Protection'
6. The form can now be edited

When you come to save your template, EMIS Web will ask you if you want to restore the protection:

Form fields won't work

The document template contains form fields (e.g. checkboxes) that will not work unless you protect this document.
Do you want to protect this document now (it will be a blank password)?
The protection will need to be removed (with a blank password) to edit this document template further.

Yes   No

We recommend that you click **Yes**, and allow EMIS to lock the form.
If you choose not to Lock the form once more, your staff will be able to change the form itself, but checkboxes will not function by simply clicking them.

Finding the right form in EMIS Web

To improve efficiency, OCCG proformas for EMIS Web come with additional keywords in their properties. When staff need to find a form, they should not have to know the title of the document, or which folder it is in. Instead, we suggest that you make EMIS Web do the hard work, and train staff to search for a sensible keyword.

For example in a heart failure patient, they search for "Heart" or "Failure" or "Echo". Doing so will find the form they are expecting, AND other forms that may be relevant to their care of the patient e.g. heart failure nurses, the form for direct echo requests.

In addition, each EMIS Web document template can have an appropriate READ code attached to it, and we have pre-selected a sensible code for you, which will prevent staff needing to manually select their own code when generating the form.

Figure 1 example of heart failure referral form with its keywords and defined READ code (only the Code Term is displayed, not the actual READ code)

Clinical Emails

Information Governance

The Subject line of a clinical email should NOT be immediately identifiable i.e. the patient name must not be in the title of the email.

Unfortunately EMIS will automatically produce the patient name in the Subject Line.

The suggested standard is that the Subject line should have at least one unique identifier and preferably two. Our recommendation is that you choose NHS Number and Initials to make it easy to track outgoing and incoming messages.

Subject: new ref Ms MM NHS No 444 555 9999 Dr Tom Nichols South Oxford Health Centre

Figure 2 example of an IG compliant concise Subject Header

If the name and organisation of the referring clinician are in the subject line, it makes it considerably easier to track the origin of a message, and ensure that return correspondence is directed to the correct member of staff.

Tips:

To rapidly paste identifiers about a patient in EMIS Web, right click the Precis Bar to choose data to copy into the clipboard.

To rapidly enter information about the sender into a subject line, consider copying and pasting a line from your email signature strip.
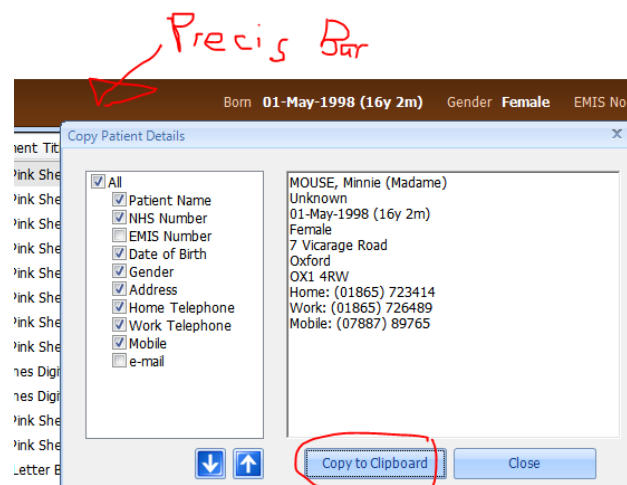
Using Read Receipts

The 2ww urgent cancer referral service has recently moved to email referrals as the primary route for new cancer referrals.

The service has advised General Practices to start using Read Receipts in order to identify whether an email has been correctly received and processed.

When a receipt is requested, the person reading the email is offered the choice of telling you that they have read the email.

The 2ww service staff will reply and you will receive a message similar to this:

Read: FAO Dr Luqmani's team Mrs AM NHS No ███████ **Dr T.A.E.Nicho**

███████ (RTH) OUH <███████>

Sent: Tue 15/07/2014 10:51

To: Sohc Clinical (South Oxford Health Centre)

Your message was read on Tuesday, July 15, 2014 10:51:14 AM (GMT) Greenwich Mean Time

Figure 3 example of a Read Receipt response

You may wish to review and file all Read Receipts manually, but it would also be possible to configure a Rule to file them within a folder of your inbox.

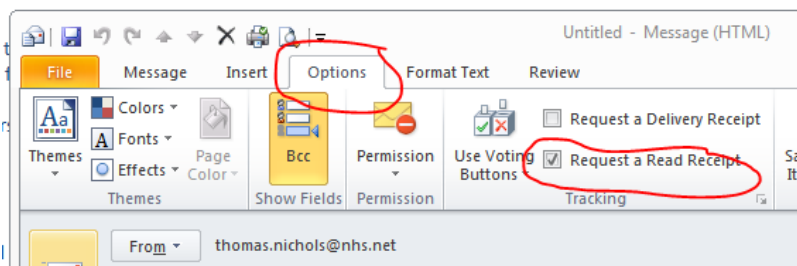## Requesting Read Receipts in Microsoft Outlook

Figure 4 if using MS Outlook – use the Options tab from a new message and check the box "Request a Read Receipt"

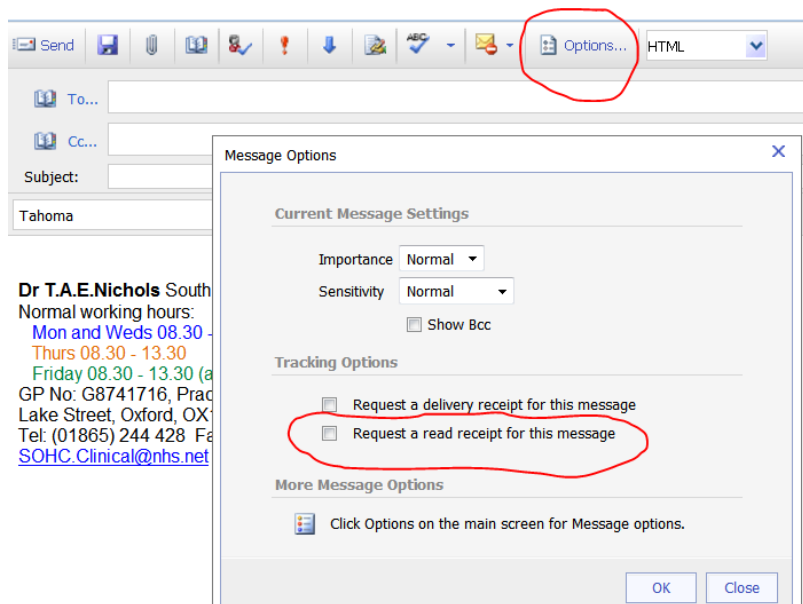## Requesting Read Receipts in Outlook Web Access (NHS.net via an internet browser)

Figure 5 is using an internet browser, click Options on a new email, and check the box in the panel

Emailing a referral form from EMIS Web using Microsoft Outlook

When creating and then saving a Document in EMIS Web, if there is no READ code, this window will automatically appear:
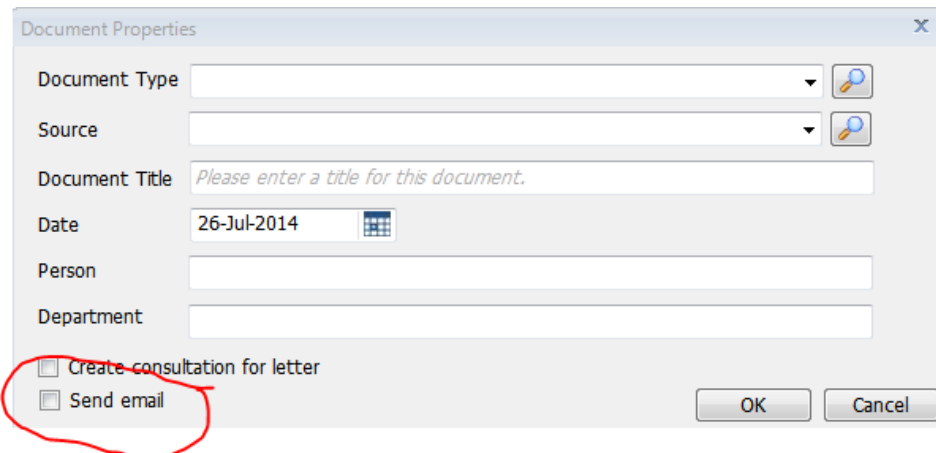

Figure 6 Document Properties box

If you tick the "Send email" box, when you press OK EMIS Web will open a "New Message" window in Microsoft Outlook with the EMIS document attached, ready to be emailed.

If the document already has a READ code (e.g. most of the 2ww forms, many other OCCG documents), then you will *only* see the "Send email" option if you press "Save" or "Save As" options when you have finished the document (if you select Save and Close you will not be offered the option!).
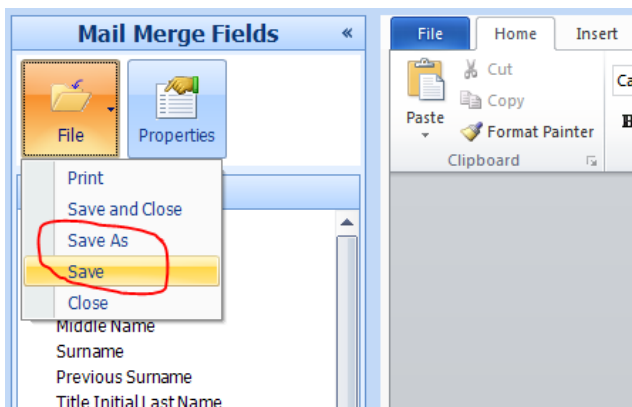

Figure 7 Save and Save As options when creating a document, where Send Email will be available

Saved documents can be emailed from the Documents Page in EMIS – from there you can View items (by double clicking on them or selecting several and right-click – View), select Send – via Email (*n.b. scanned Docman documents cannot be emailed conveniently this way – they have to be sent from Docman*)
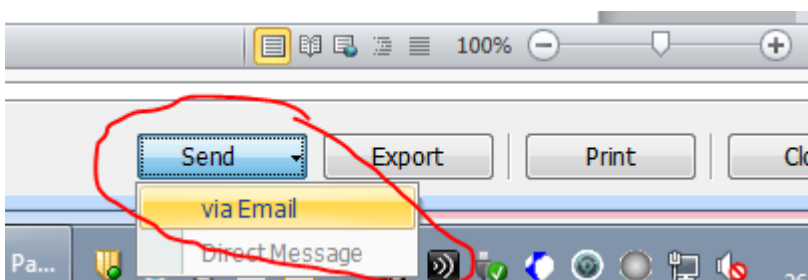

Figure 8 Send via Email option when Viewing a Document in EMIS Web