

Importing Word Referral Forms for use in SystmOne with Integrated Word

Saving the referral forms

To use the forms with your clinical system, you need to download them from the Knowledge Anglia site. www.knowledgeanglia.nhs.uk

NOTE: If you use the www link to the Knowledge Anglia site, you will be asked to log in. Change the first 'w' to 'n' and you will be on the N3 user site which does not require a log in.

Select your CCG using the relevant icon.

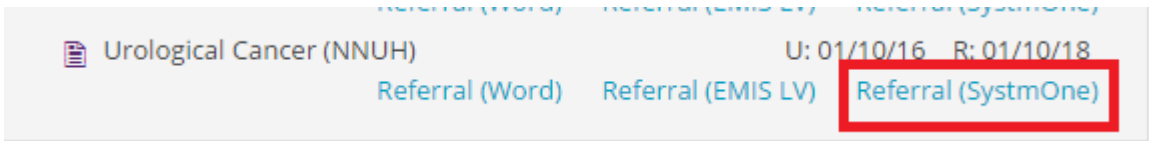


After selecting your CCG **hover** over the 'Forms' section, this brings up a "Pop up" window as shown below.



Select the relevant area e.g. Norfolk & Norwich Hospital.

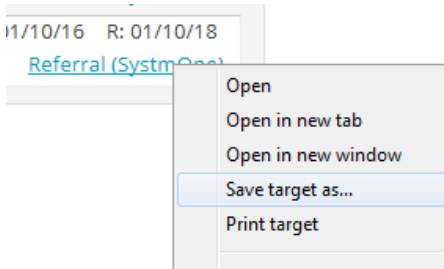
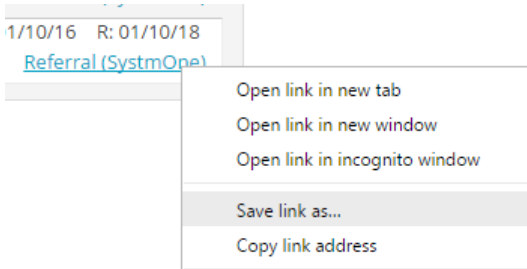
After selecting you are presented with the various forms that are available for this location.



Right click on the SystemOne version, and select to save the file to a temporary location on your practice computer or a shared drive you use.

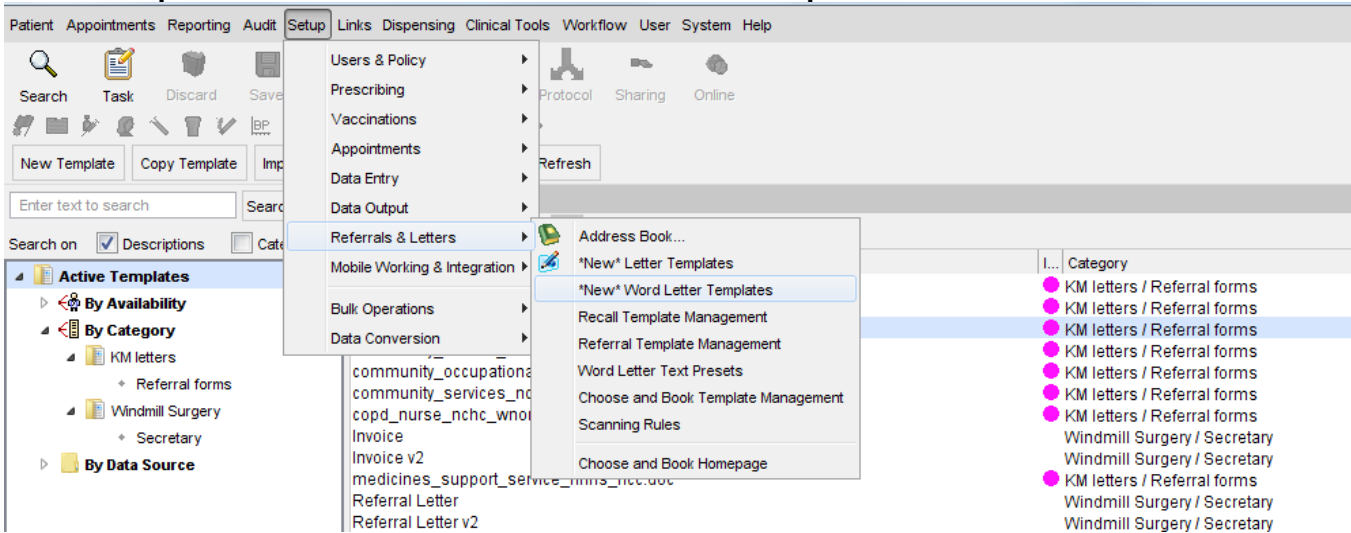
Google Chrome:

Internet Explorer:

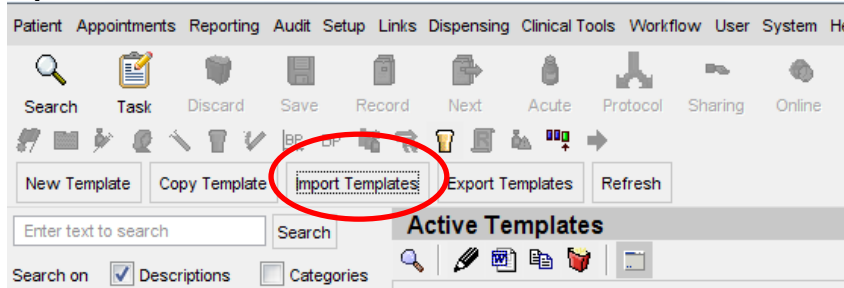


Import the forms into SystemOne

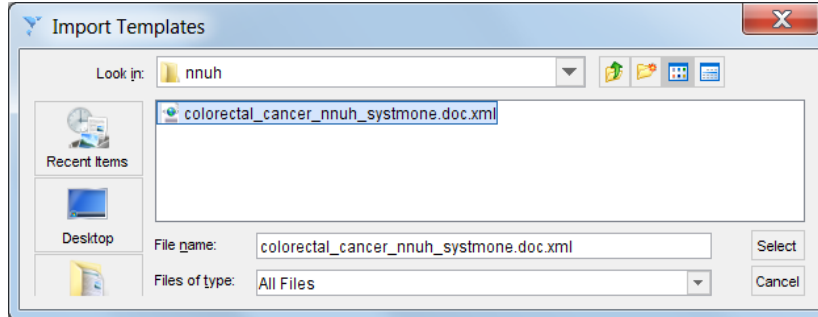
Select **Setup > Referrals & Letters > New Word Letter Templates**



Click on **Import Templates**



Select the file you saved earlier

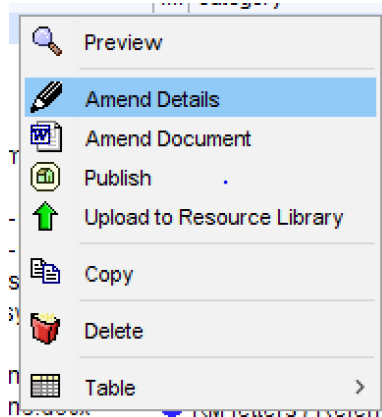


NB: SystemOne shows the template name, not the file name when it is imported, therefore there is no point changing the filename at this point.

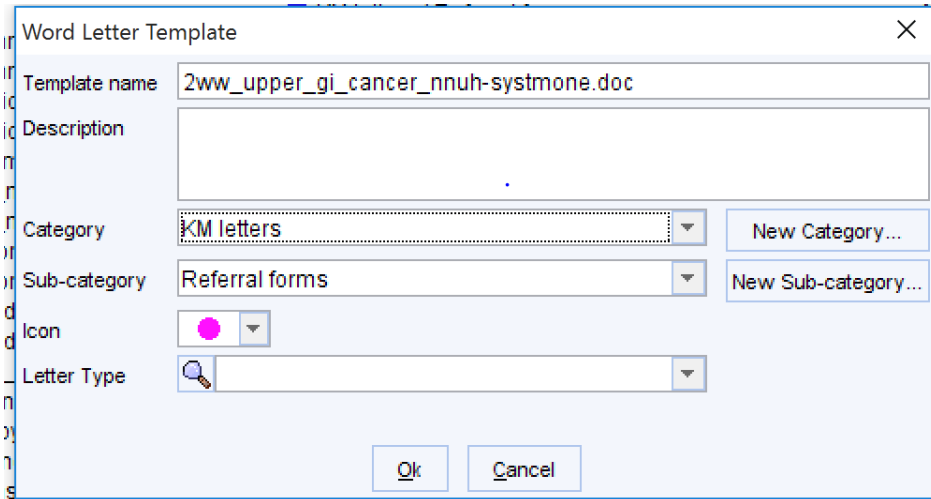
*The file will be saved under the default location of **KM Letters: Referral forms.***

You will be able to rename and save the file to a folder of your choice or making once it has been imported into SystemOne.

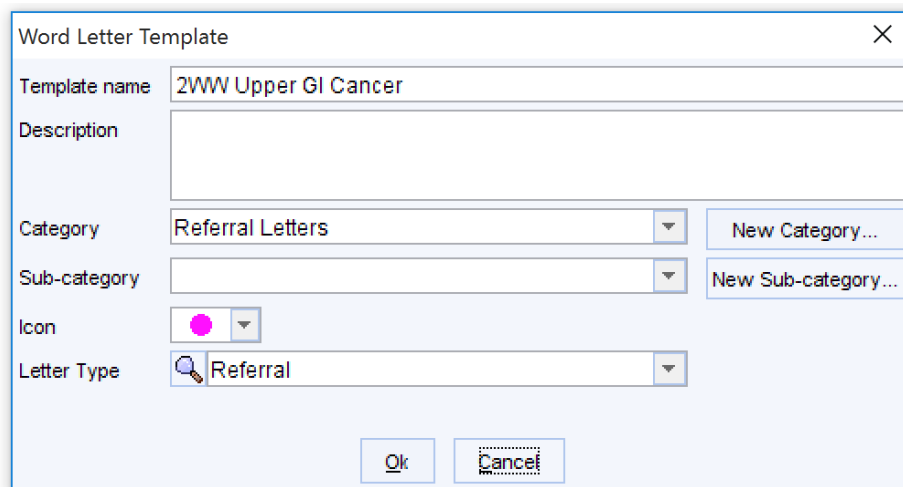
Right Click on the template you wish to re-name
Choose Amend Details



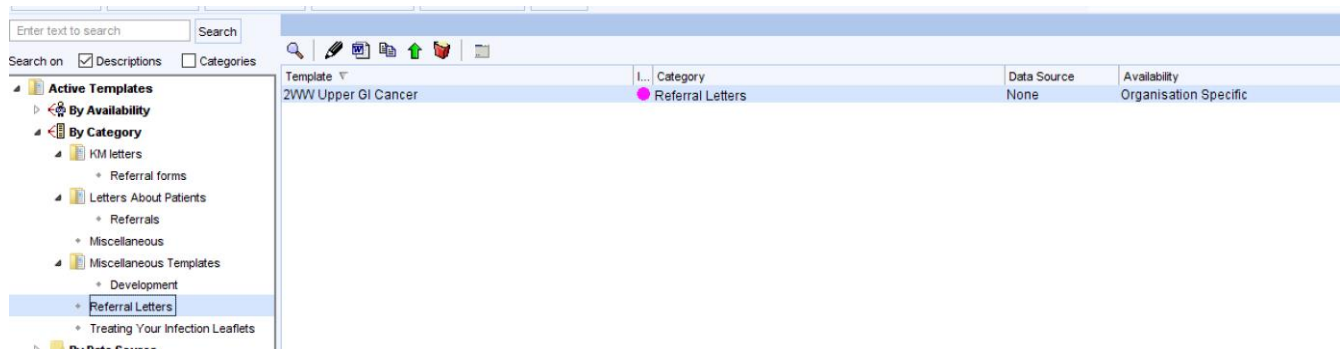
The following screen will appear:



You can give the template a new name, add a description, amend the Category and Subcategory, and Letter Type to suit your needs in this screen.

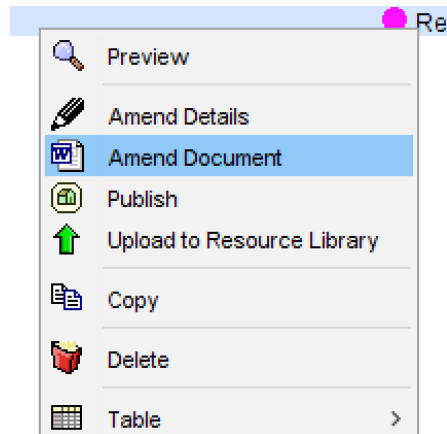


Once you have made the changes you want, click OK

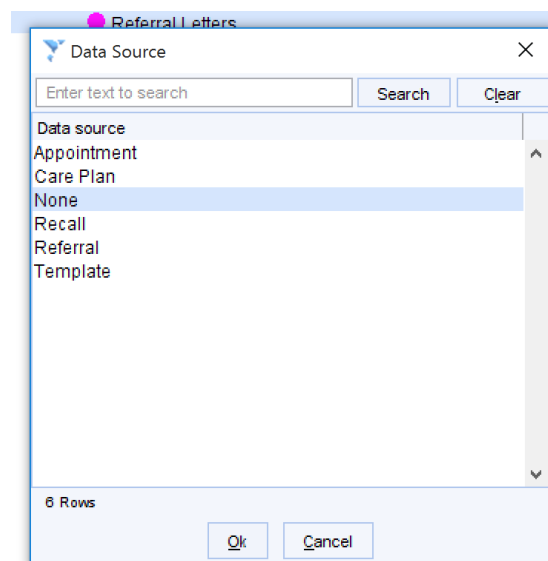
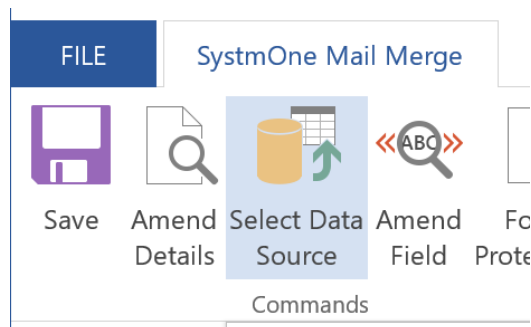


The template will be saved in the Category of your choice.

The template Data Source should read 'None'. If your template has a data source of 'Referral', the template data source will need changing to 'None' by amending document.



From the SystemOne Mail Merge toolbar click on Select Data Source



This will enable you to pick up the template from Communications & Letters

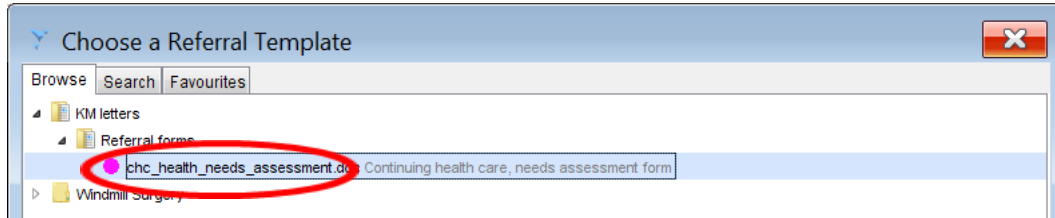
Using Referral Forms in SystmOne (Non eRS Referral)

Retrieve Patient record.

Right click on Referrals, and select **“New Word Referral”**

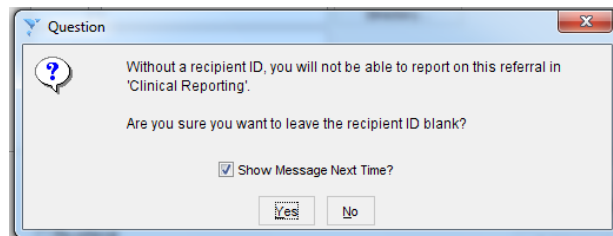
Follow your usual process to add the recipient, read code etc.

Click on **Choose Template** and select the correct proforma



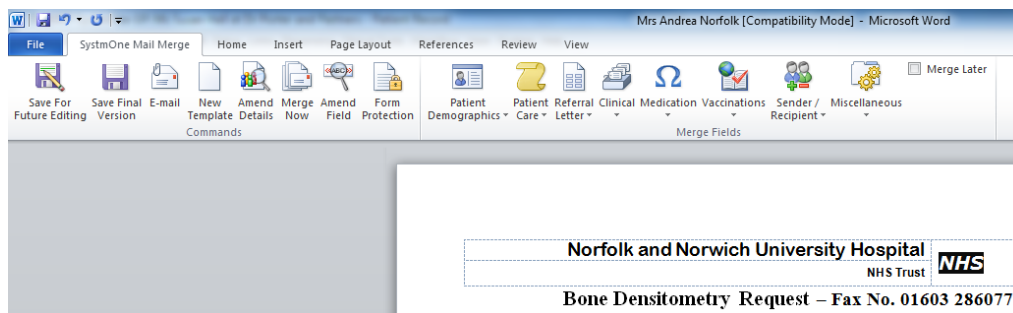
Once selected use **Write Now**

NB if you receive any recipient ID and address warnings – click Yes for both



FORM PROTECTION

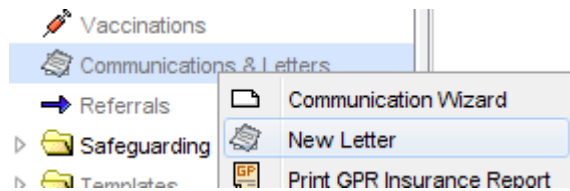
Complete any areas of the form that have not been pre-filled and then **FORM PROTECTION** Save for **Future Editing** or **Save Final Version**



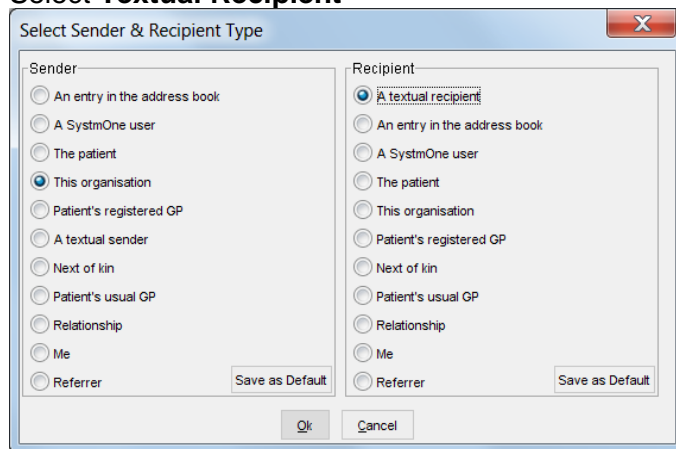
Using Referral Forms in SystmOne with eRS

Retrieve Patient record

Right click on **Communications & Letters**, and select **'New letter'**

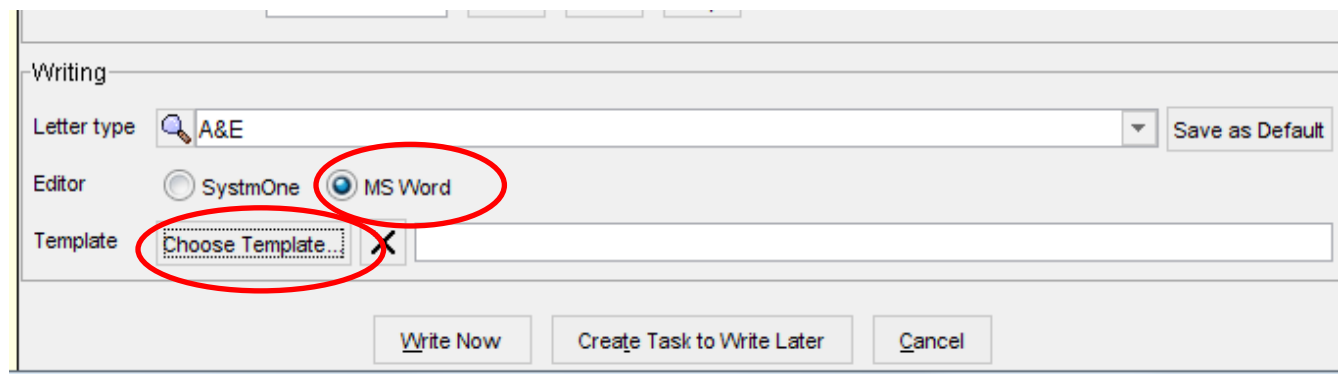


Select Textual Recipient

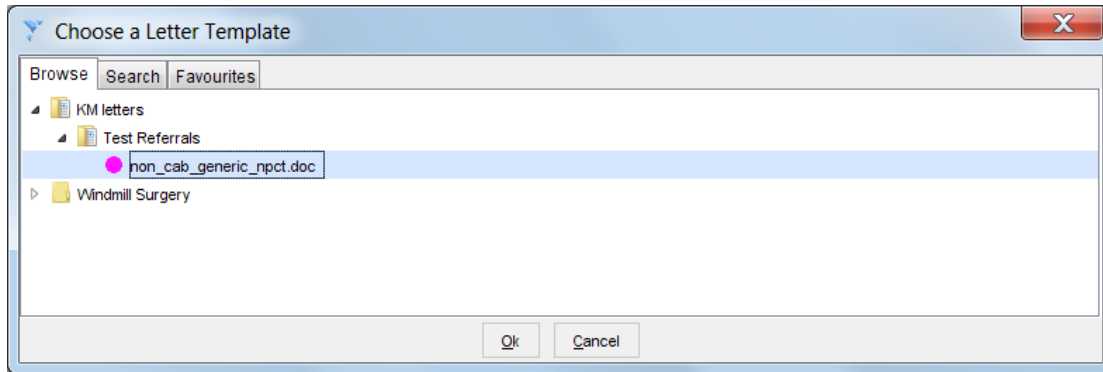


Follow your usual process to add the recipient, read code etc.

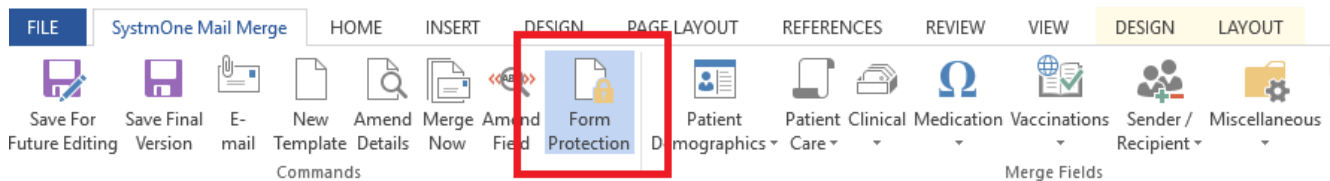
Select **MS Word** as the Editor and **Choose Template**



Select the template required.



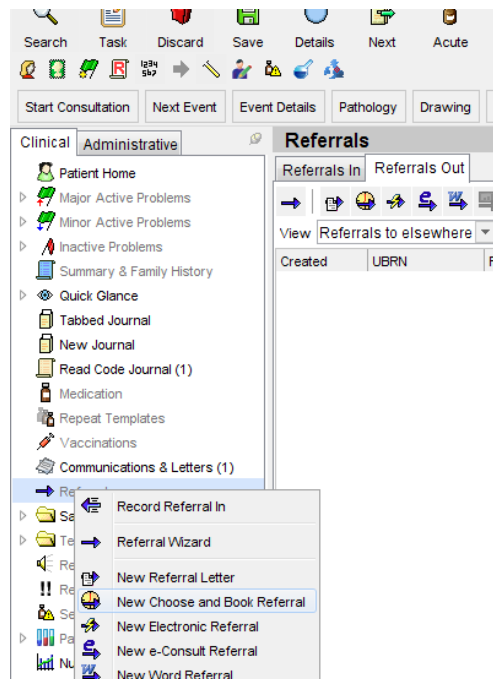
Make the form editable by clicking once on the **Form Protection** button.
Complete the document as normal remembering to enter details, check tick boxes etc.



After you have completed your edit, click on **Form Protection** again to reprotect the document and then select either **Save for Future Editing** or **Send Final Version**.

This will save the document in the patient's record.

From the patient record, select **Referrals** and **right click**, choose **New Choose and Book Referral**.



Continue as normal, once all of the relevant details have been completed on SystmOne and eRS enter the referral text in the free text box or attach a referral letter if this is your preference.

Now click on **Letter** to attach the previously completed template, it should be the last one on the list.

Select **Save for Future Editing** or **Send Final Version**

Now **Save** the patients record (this captures the UBRN and referral details entered)

Completing Forms

When completing the form, please note the following:

To follow the Hyperlinks

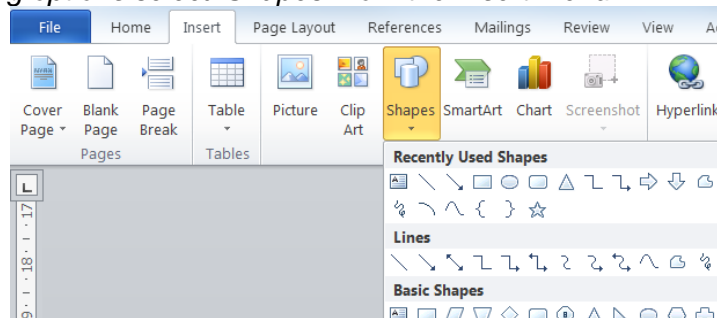
All forms with supporting text in the system have a blue hyperlink at the top of the form. These links only work if the document is unprotected. see adding additional text below.

To annotating Images

The Word drawing function can be used to annotate anatomical diagrams if they need to be marked as part of the form completion, the Word drawing function can be used.

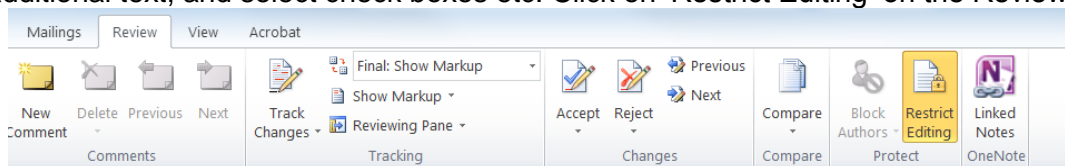
NB. This can only be done whilst the document is unprotected.

NB to See Drawing options select 'Shapes' from the Insert menu:

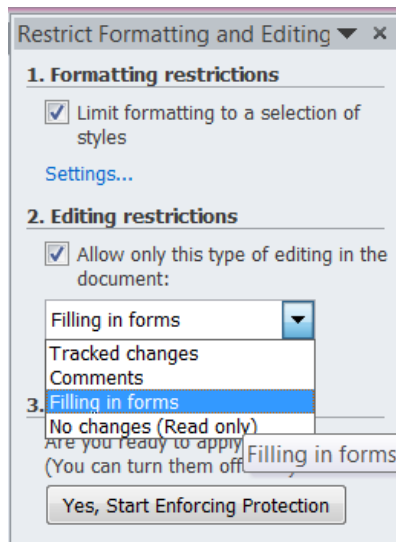


To select options and add additional text

to enter additional text, and select check boxes etc. Click on 'Restrict Editing' on the Review menu:



To protect the form, select the following:



You can then type in the greyed out areas only, or click into the Check boxes to select.

NB - do not un-protect the form after you have entered information into the greyed out boxes, as when re-protecting the form, you will lose your changes.