**Knowledge Anglia - Referral form criteria**

We require referral forms to meet the criteria set out in this document to ensure continued standards across Knowledge Anglia and other inter-related systems within the local healthcare landscape. This means we continue to:

* Adhere to the [NHS Accessible Information Standard](https://www.england.nhs.uk/publication/?filter-category=ais) (AIS)
* Confirm content meets best practice guidelines
* Display content in the most suitable format for the audience
* Maintain and strive to improve quality standards
* Guarantee content is valid, accurate and up to date
* Demonstrate clear ownership, approval and review processes from authors

1. Development Phase

Support, training and templates are offered by the Directories and Knowledge Resource (DKR) Team to assist with the creation and development of referral / prior approval forms to ensure international standards, best practice and accessibility criteria are applied. It is best to involve us as early in the creation of these forms as possible as we can save time and effort for authors.

1. **Commissioner approval**

Most forms can be updated or loaded onto the site when received directly from the provider or service. However, occasionally we will have to seek commissioner’s approval, particularly when changes to a form indicate changes to referral criteria or the service provided.

1. **Minimum standards for referral forms**

All forms should meet minimum standards which comply with the AIS. Support, training and templates are offered by the DKR Team to assist authors in developing forms.

* All referral forms need to be made available in word format.
* Tables should be used to lay out the structure of the form.
* The form should have clearly defined sections for patient’s details, referrer’s details and relevant clinical / supporting information.
* NHS number and date of birth must be included on all forms to support patient identification.

Accessible Information Standard (including interpretation / translation)

* The form should include a section to indicate whether the service user has any additional needs in relation to accessibility, such as:

|  |  |
| --- | --- |
| If the service user requires an interpreter, please specify language | |
|  | |
| [**Accessible Information Standard**](http://nww.knowledgeanglia.nhs.uk/LinkClick.aspx?fileticket=WwpXZ6F3-ME%3d&tabid=1279&portalid=1&mid=1722) | |
| Does the service user have additional needs related to: | Please specify below as applicable: |
| Vision |  |
| Hearing |  |
| Speech |  |
| Other communication difficulties |  |

Clinical System requirements

* Medicine and Allergy fields need to be placed either together in one cell, or on separate rows, not in columns.

Footer

* All forms should include a footer indicating the date (and version number if relevant).
* Page numbers should be in the format 'Page x of y' and placed in the bottom right corner.

**Font:**

* Align text to the left margin and avoid 'justifying' text.
* Use a clear uncluttered and sans serif font such as Arial.
* Use a minimum font size 12 point, preferably 14 (which is readable by a significantly greater number of people). If the document is to be publicly available, a minimum font size of Arial 14 must be used. (see [AIS](https://www.england.nhs.uk/publication/?filter-category=ais))

Formatting

* Do not use underlined text as this can make text difficult to read. Underlined text should be used to indicate a web address or hyperlink (like [www.knowledgeanglia.nhs.uk](http://www.knowledgeanglia.nhs.uk)).
* Do not use BLOCK CAPITALS or *italics* as some people find these difficult to read.
* Bold may be used to emphasise words or phrases within a document but overuse can make it lose its impact.

Form fields

* Do not use text boxes, tabs, web forms or "......." to indicate the area where information should be written or typed. Form fields should be used instead.
* Tick / check boxes should always be aligned in front of the text that is being selected.
* Any references to tick / check boxes should be ‘please indicate’ or ‘mark’ the selection. When these are completed electronically the box is marked with a cross which can confuse people if they are told to tick an option.

Images and Photos

* Ensure you have the correct permissions to comply with copyright laws.
* Images should be aligned as ‘in line with text’.

Logos

* Logos should be used on all forms to indicate ownership.

Referral Criteria

* Where a service needs to reference referral criteria, it is considered best practice to include a hyperlink to the information on Knowledge Anglia or Heron. This reduces the length of the form.

Spacing

* Avoid ‘squashing’ text in a table to make sure it fits on one or two pages.
* Page margins should be a minimum of 1.5cm.
* Table margins should be a minimum of 0.2cm left and right and 0.08cm top and bottom (preferably 0.1cm top and bottom).
* Do not use the Enter key to increase the individual row spacing as this adds lines that cannot be utilised when entering information on the screen, instead increase the size of the row or field itself to display additional space.

Sending the form

* Forms should include instruction on how to send the form or a hyperlink to service information which includes this information.
* eRS and email (nhs.net only) are the preferred ways to send referrals. Faxing should not be used.