

## Learning

# End hand-written referral! Create referral forms in EMIS LV

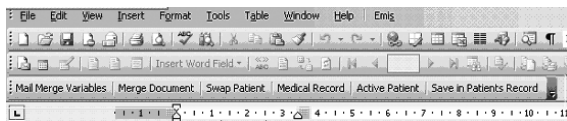
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I recently had the opportunity to convert our practice referral forms into electronic format. This is not only easy but saves time. Patient details and data can be imported straight from the EMIS record; Microsoft Word can be used to create time saving 'tick boxes' and 'drop down menus', the form can be saved straight to the patients notes and the document simply emailed.

## Creating the referral form

To get started type 'WP' and 'N' from within the EMIS screen to create a new document. Opening/creating a document within EMIS gives access to the EMIS word integration tools, used to import selected data from the EMIS records. Microsoft Word with its 'forms toolbar' makes it easy to create an acceptable version of any referral form.

## EMIS Word integration tool bar

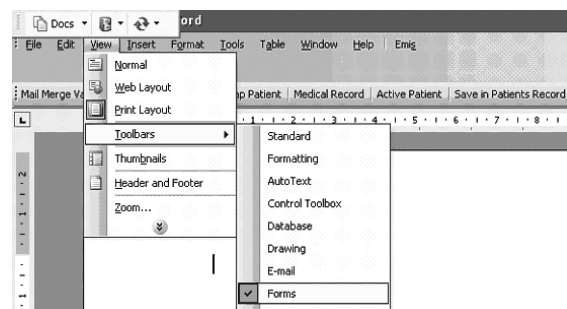


If you do not see the EMIS word integration tool bar as above, you need to check that the EMIS macro is not disabled: click on 'help' then 'about Microsoft office word' then 'disabled items' and re-enable the EMIS macro.

It is worth noting however that most hospital departments will agree to send an electronic version of their forms, usually in a rich text format (.rtf). If an electronic hospital version is available then open it from within EMIS by typing 'WP' and 'E'.

Make sure that the Microsoft Word 'forms' toolbar is active. Click 'view', 'toolbars' then 'forms'. This toolbar is helpful in creating referral forms.

## How to activate the forms toolbar



Interactive 'tick boxes' and 'drop down menus' can be easily inserted into your forms as can boxes for free text (the 'ab' icon). Drop down menus allow you to enter, for example, a choice of hospitals to refer to. The document must be 'unlocked' while editing. Clicking on the 'padlock' icon (on the forms toolbar) toggles between locking and unlocking the document from edits.

## EMIS Word integration

The next stage is to use EMIS Word integration to import details from patient's notes. Position the cursor where the imported data is required and click on 'Mail Merge Variables'.

## Opening Mail Merge Variables

This brings up a list of options for data to be imported from EMIS, including patient details, medication lists and the referral date. Clicking on the 'ReadCode' option enables specific read coded information to be imported. This can be useful for importing blood results, blood pressure readings and other values which may be required for the referral. These 'readterms' are imported in a table format, so this needs to be taken into account when designing the form.

It is a good idea to save your referral forms on the practice network hard drive click 'save as' 'my network places' then 'MSWDocs on Emis'. We have created a 'Referrals' subfolder to store all of our electronic referrals. The referral form needs to be locked (click on the padlock icon) before saving in order that the tick boxes, drop down menus etc will work.

## Using the forms

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From the patients records click 'W' then 'K' to 'open document with current patient'. The completed form can be printed or emailed before saving it in the patients record, by clicking the 'save to patients record' tab. We have found that cancer referrals, physiotherapy and antenatal referrals have been particularly useful. EMIS also has a number of standard referral forms for cancer referrals. These can be adapted to local cancer pathways with local addresses/contact numbers and can be accessed by typing 'WP' 'M' and opening 'EMIS standard templates'.

## Summary

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Creating an electronic version of any referral form is easy and time saving. Feedback has been positive and we highly recommend it.

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*Submitted 19 February 2008; comments to author 7 April 2008; revised 9 October 2009; accepted for publication 9 October 2009.*