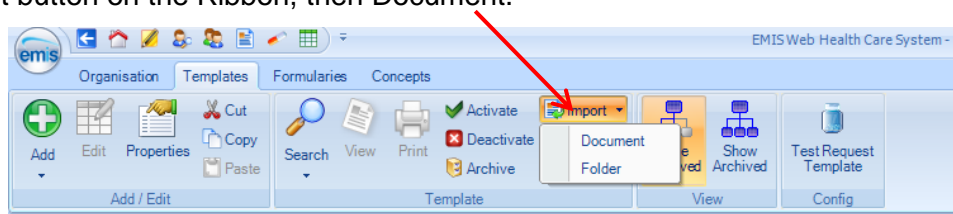


EMIS WEB Referral Proforma

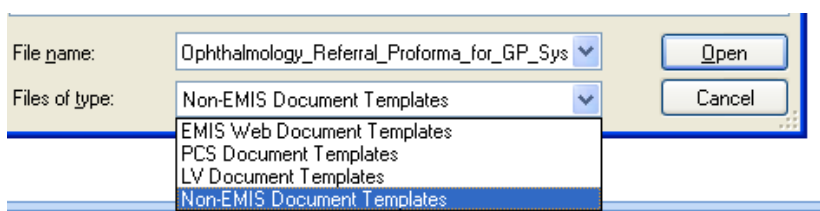
How to import the Proforma and use them in EMIS WEB

Download Proforma Documents

1. Download the EMIS WEB compatible proforma from the CCG Clinical Policies website: <https://www.cambridgeshireandpeterboroughccg.nhs.uk/health-professionals/clinical-policies-and-thresholds/clinical-policies/> and save in a folder on your shared drive, or alternatively to the Desktop.
2. Click the EMIS button, Configuration, Template Manager and click the tab for Document Templates.
3. Click the required folder in which you wish to import the new template.
4. Click the Import button on the Ribbon, then Document.

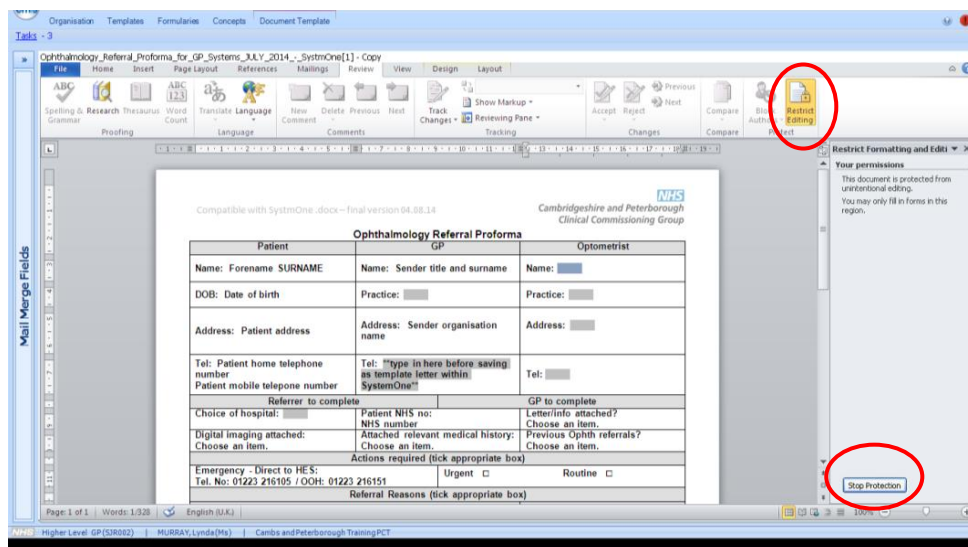


5. Locate the pro-forma you previously saved. Ensure the "Files of type" drop down selection is on Non-EMIS Document Templates. Then click the Open button.

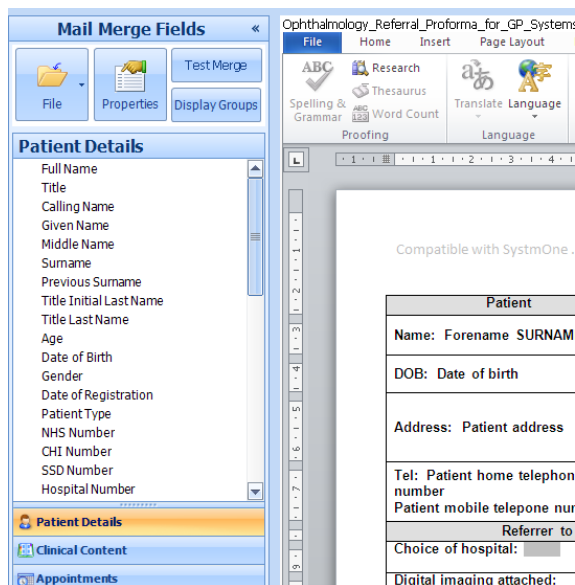


Add Field Codes

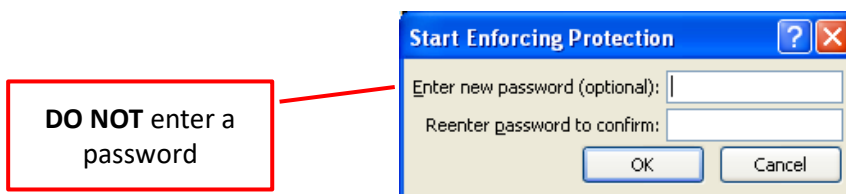
1. Select the newly imported template and click the Edit button on the ribbon.
2. Unprotect the document: Click the Review tab on the Ribbon, Restrict Editing button, Stop Protection button.



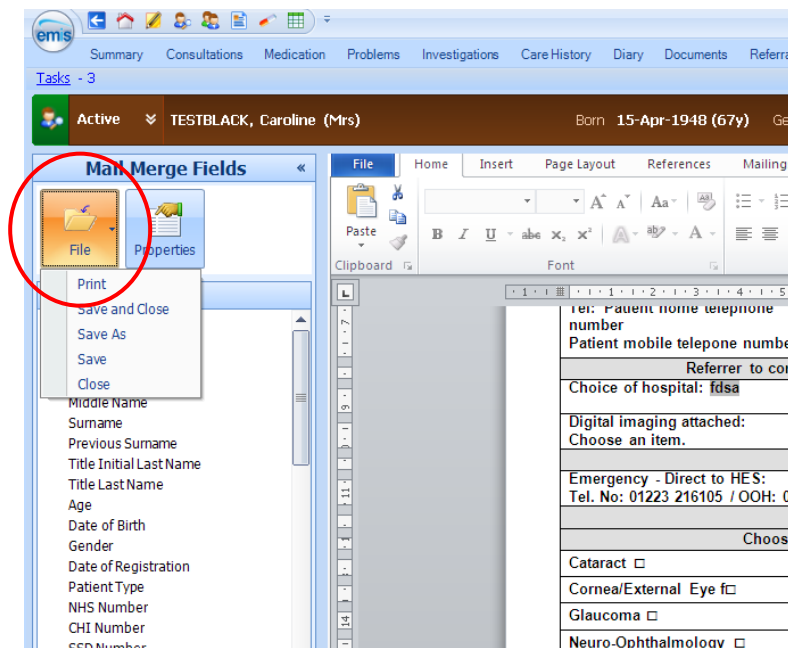
- Replace existing field names with EMIS Web field names, using the options available in panel on left of letter.



- Type the surgery phone number in the relevant box on the form.
- Re-protect document: Click the **Yes, Start Enforcing Protection** button (right hand panel). DO NOT enter a password, leave the two boxes empty and click OK.

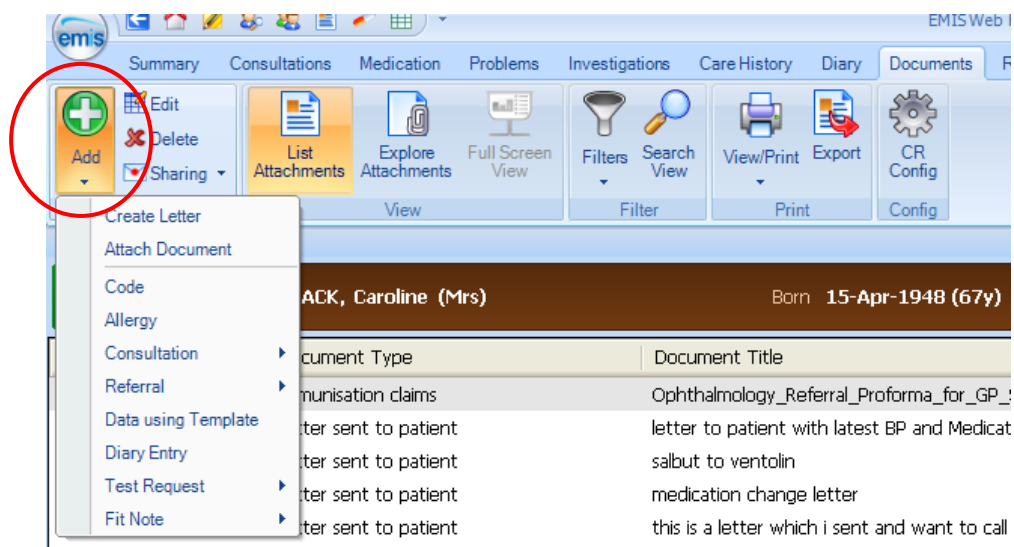


- Click File button on left hand panel, Save and Close

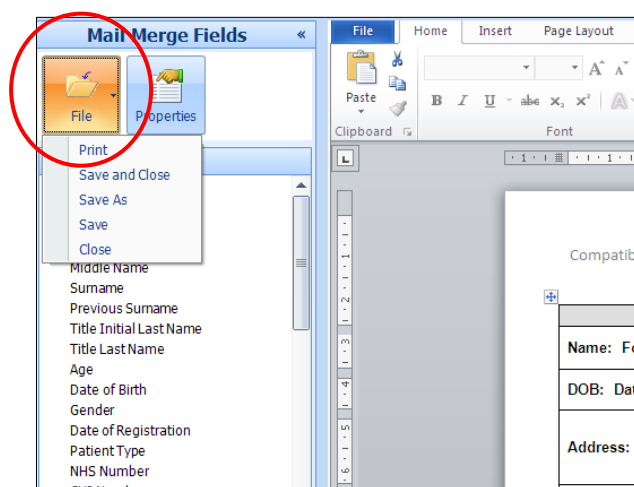


Completing the Form

1. Open a patient record.
2. EMIS button, Care Records, Documents.
3. Click the Add button on ribbon, Create Letter.



4. Select the new template and click OK.
5. After the proforma is completed and printed, use the File button on the left hand panel to Save or Save and Close to ensure the form is saved into the patient record.



6. Select the relevant Document type field from the drop down list, then click OK

The screenshot shows the 'Document Properties' dialog box. The 'Document Type' field is set to 'Referral letter'. The 'Document Title' field is 'Varicose_Vein_Interventions_Referral_Proforma_for_Prmary_&_Scndry_-_EMIS_'. The 'Date' field is '14-May-2015'. The 'Person' and 'Department' fields are empty. The 'Send email' checkbox is unchecked. The 'OK' and 'Cancel' buttons are visible at the bottom right.