



Pan London Suspected Cancer Referral Forms for GPs

A step-by-step guide to installing and using the Vision forms.

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Contents

Introduction.....	4
Installing the document templates	5
Altering a form	12
Example1.....	13
Example 2.....	16
Displaying a form when making a referral	16
Selecting a hospital.....	18

Please note the following:

1. **Do not** open up the forms and use Microsoft Word's copy and paste facility to copy the contents of a form to a blank document on the Vision Remote Desktop. This will render the forms incomplete and is more work than is necessary. Full instructions regarding the correct way to install a form into Vision are given in this manual.

2. These forms automatically add important clinical information.

Different Vision practices use different ways to highlight major clinical problems. Some practices will note them as part of the clinical problem list, while others will note them as part of the history but flagged with varying levels of importance.

Because of these differences in practice, the forms include **both** <<MEDICAL_HISTORY>> **and** <<PROBLEMS>> mail merge fields.

Please delete whichever one is not relevant to your practice in order to prevent duplication of clinical information.

The instructions in this manual give full details.

Introduction

The new Pan London suspected cancer forms are designed to make it as easy as possible to refer patients with the minimum of effort.

The forms are provided as **Vision mail merge Word document templates** (files with the extension **.doc**).

They contain special codes which interface with Vision.

Opening a template as a new referral letter within a patient's Vision medical record will generate a referral form, pre-populated with patient and practice details. GPs respond to questions in the clinical section of the form, typically by checking boxes or entering a minimum amount of text.

The new forms will also automatically include relevant laboratory or imaging results stored in patients' medical records.

Before the templates can be used to generate referral forms, **they must be installed as Vision mail merge Word documents**.

This booklet explains how to correctly install the Vision Mail Merge documents so they can be used to generate suspected cancer referral forms.

It also explains how to produce forms during consultations with patients and how completed forms can be sent to hospital trusts.

There are currently 13 different document templates that are used for suspected cancer referrals to various specialties.

Although these templates generate Microsoft Word documents when opened up from within Vision, they have to be **installed into Vision first**. You only need to do this from **one** computer in your surgery. Once the document templates have been installed into Vision, they will be available to all users on your network.

Make sure you have the correct Vision permissions to do this.

You will have been assigned a Vision **Role Based Access Control (RBAC) number**.

Without the correct RBAC number, the menu options required to install the templates will not be available to you.

You will need to consult your practice manager or data controller if you find you are not presented with the menu options described below.

The next section explains how to correctly install the templates so they can be used to generate referral forms.

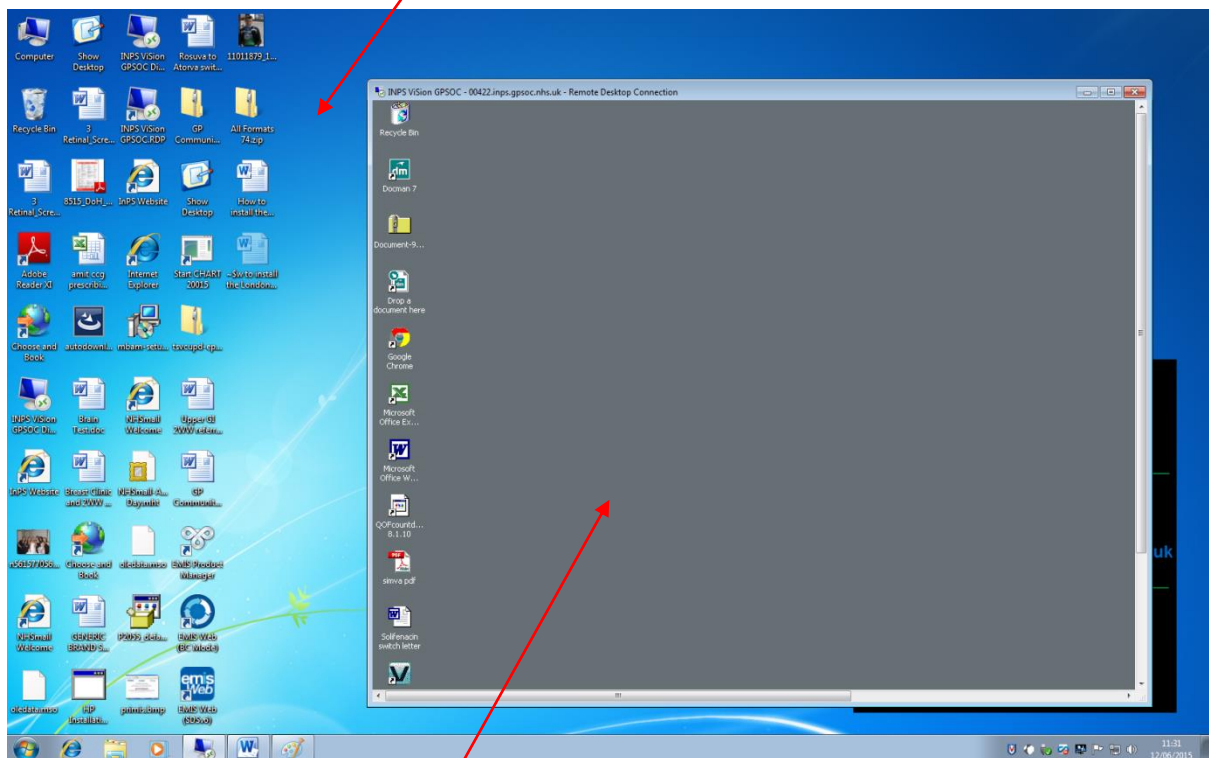
Installing the document templates

In order to install the templates into Vision, you will need to download the relevant Word document file into the WORDPROC folder on your Vision remote computer.

The forms are available from the pan London suspected cancer forms download site [here](#)

Remember: you need to download the forms to the **Vision remote computer** and **not** the local computer you are working at.

This is the local computer's desktop. You do not want to download the forms to this.



This is the **Vision remote desktop**. This belongs to the computer where you want to place the forms.

The way to do this is to maximize the Vision remote desktop so that fills your entire screen.

Do this by clicking the **maximise** button at the top right hand corner of the Vision remote desktop window.

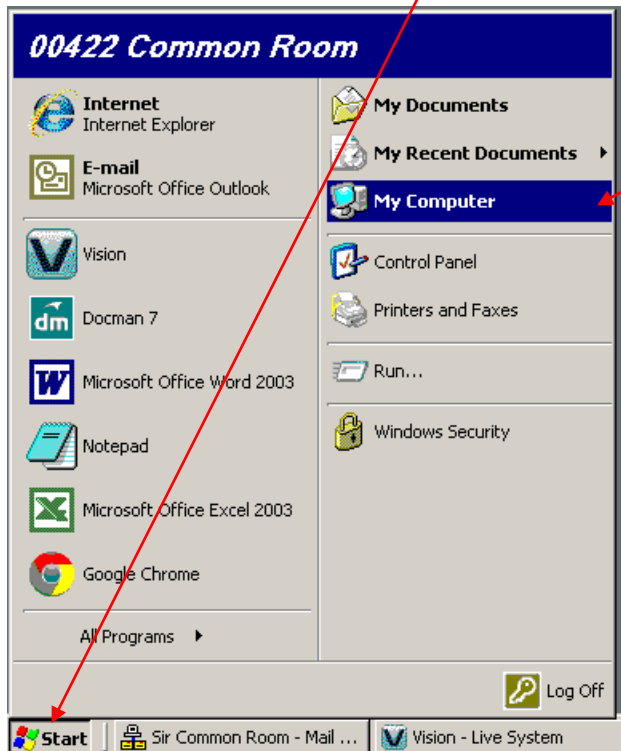


You are now effectively working on the remote computer.

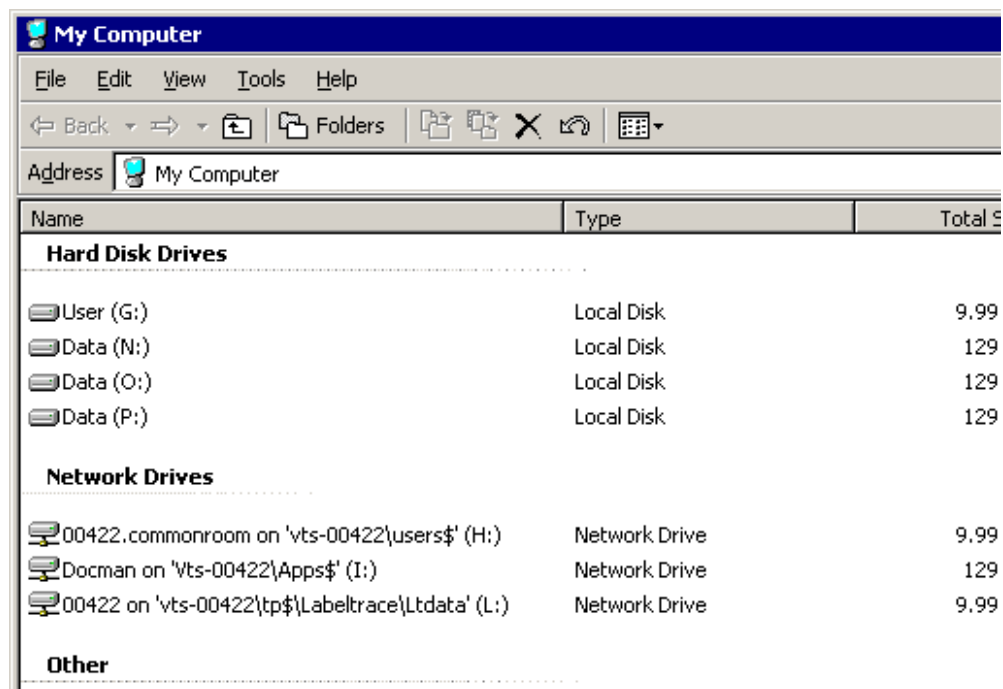
You now need to create a wordprocessor folder on your Vision computer to store the referral form templates and then download the forms into the folder you have created.

Create a WORDPROC folder to store the two week referral form templates.

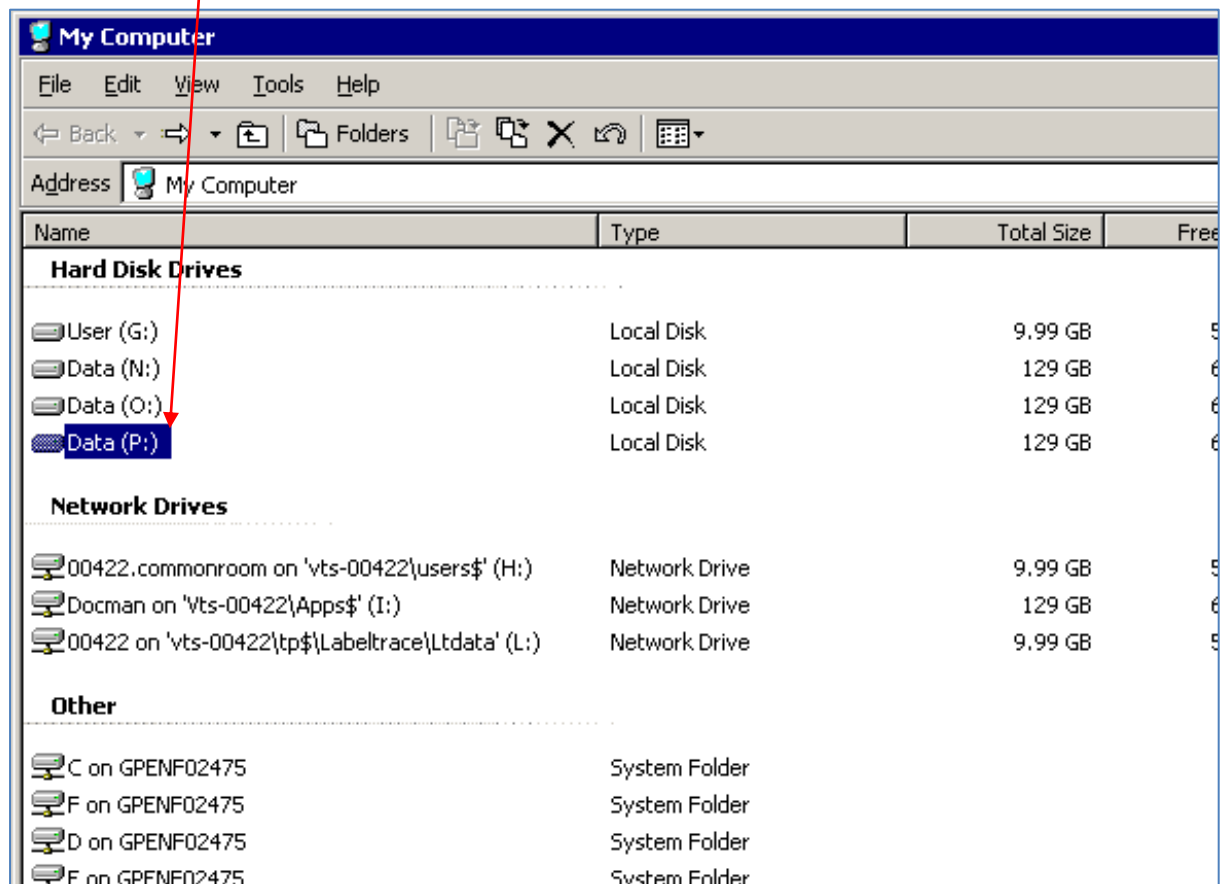
1. Create a folder on your Vision system to store the referral forms.
2. Open Filer Explorer on your Vision remote computer by accessing it from **My Computer** on the Vision remote desktop **Start menu**(see picture, below).



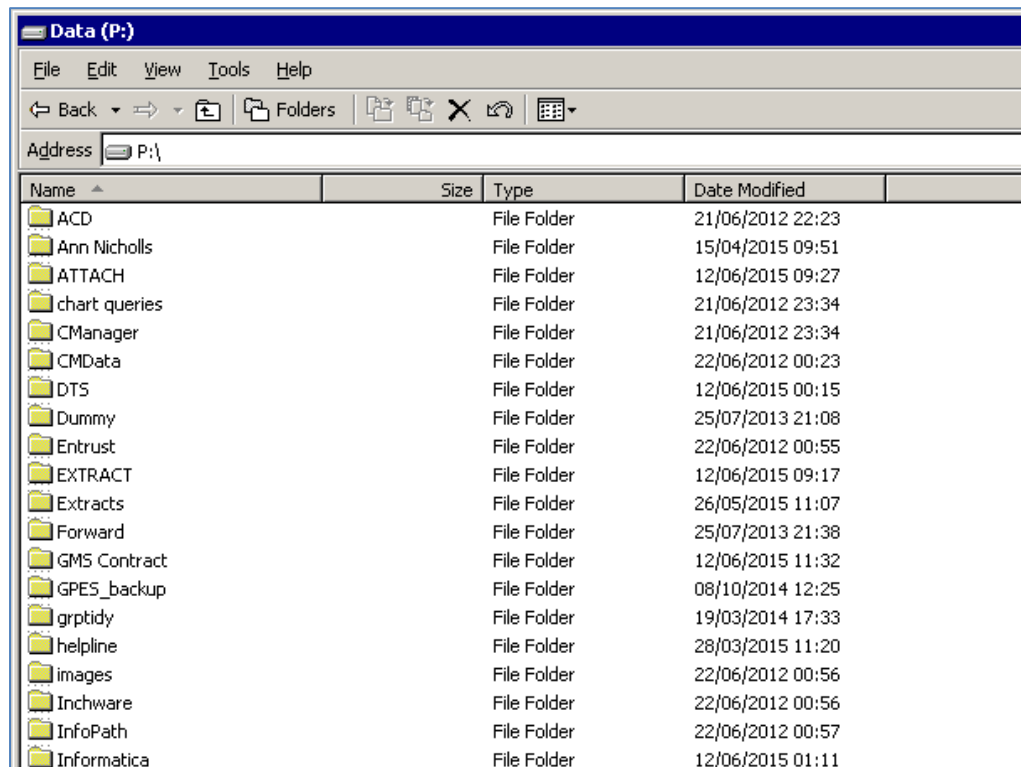
3. This displays a list of the current drives on the Vision remote computer (See picture, below).



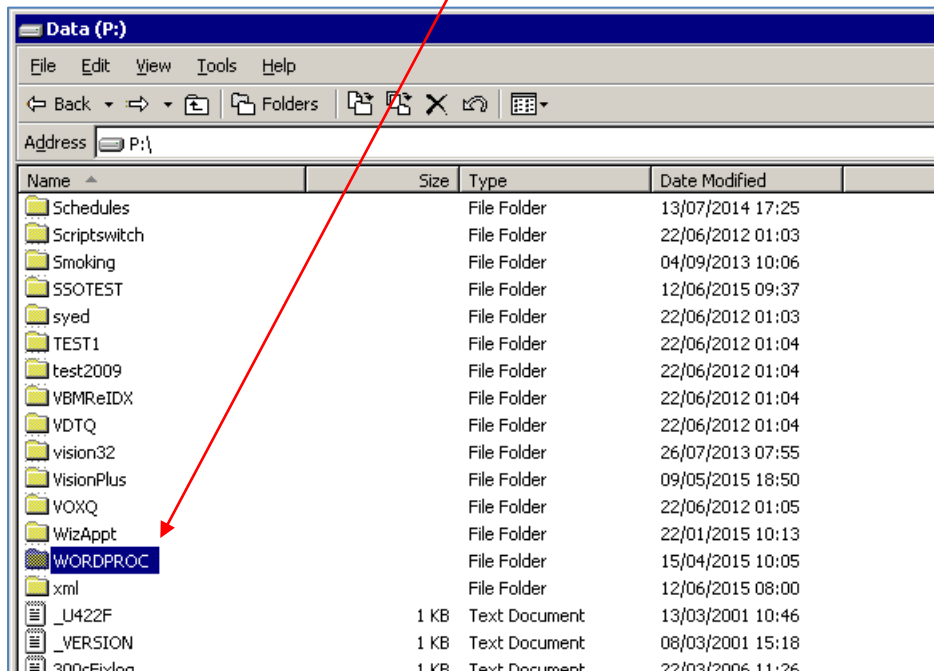
3. Select Data P:



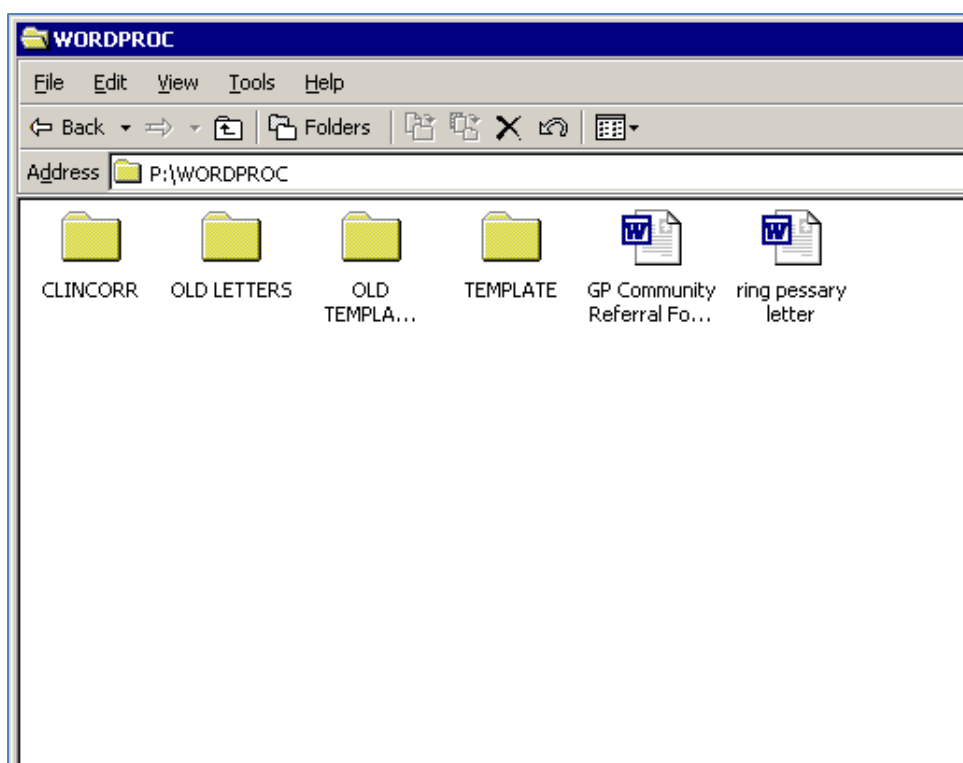
4. Double-click on the highlighted Data P: to display the folders stored there.



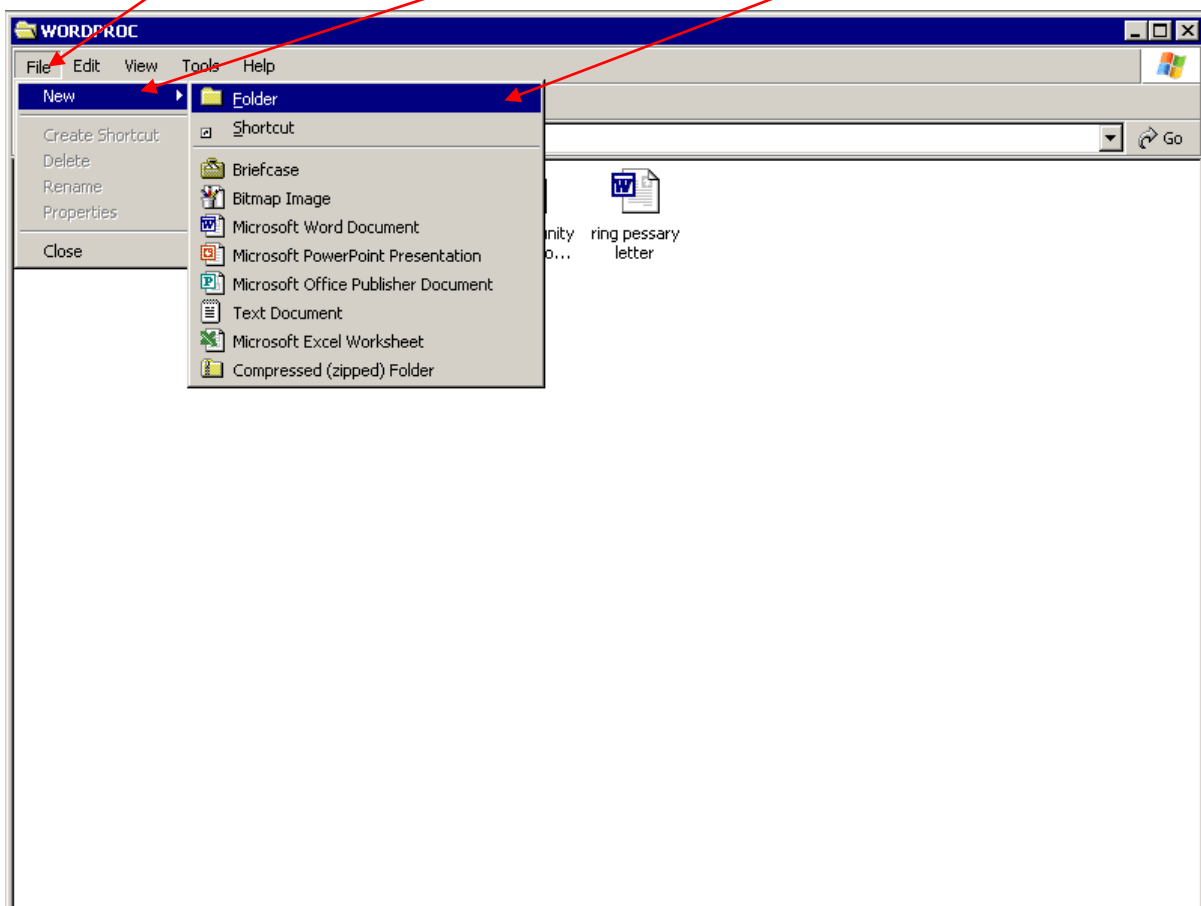
5. Find the Folder named **WORDPROC**, highlight it and double-click on it with the mouse to open the WORDPROC folder.



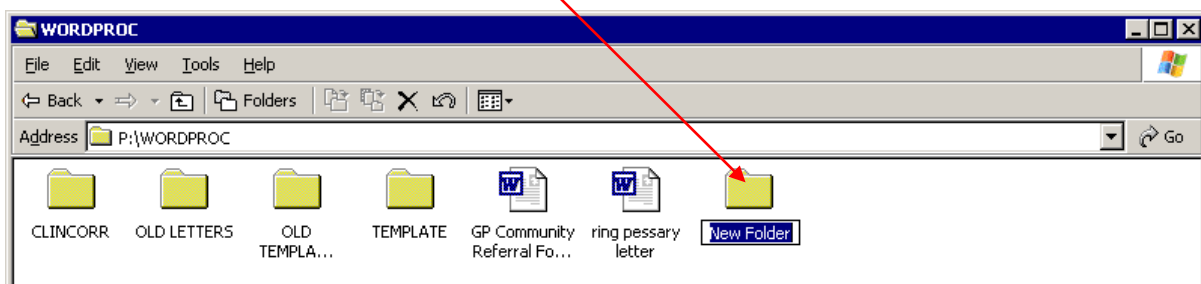
You should see something like the picture below.



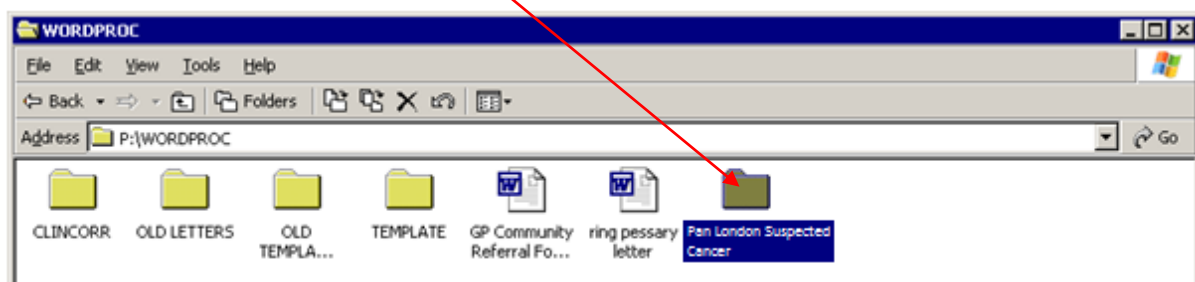
5. From the **File** menu, select option **New** and then choose **Folder**.



6. A folder will appear labelled **New Folder**, ready for you to give it a different name.

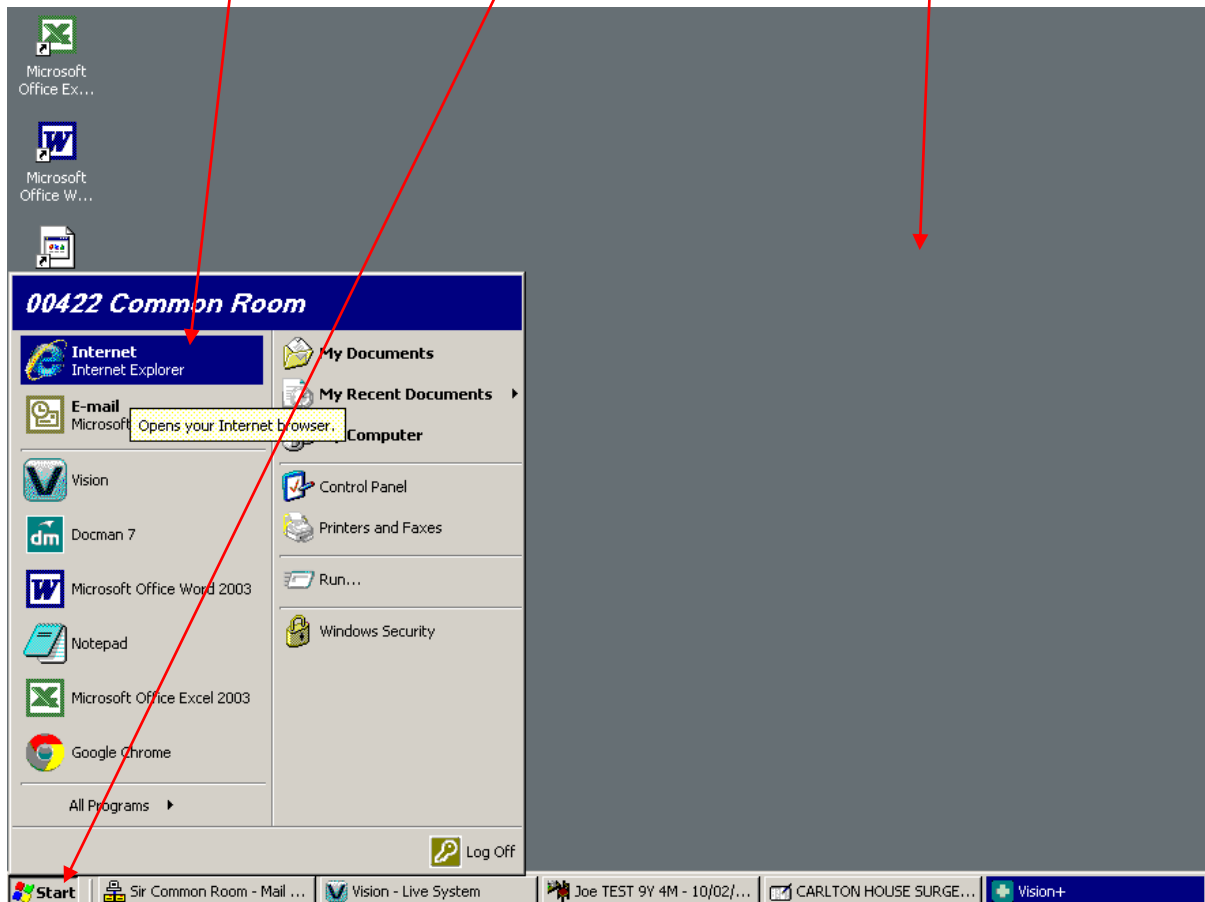


7. Please rename the folder **Pan London Suspected Cancer**.



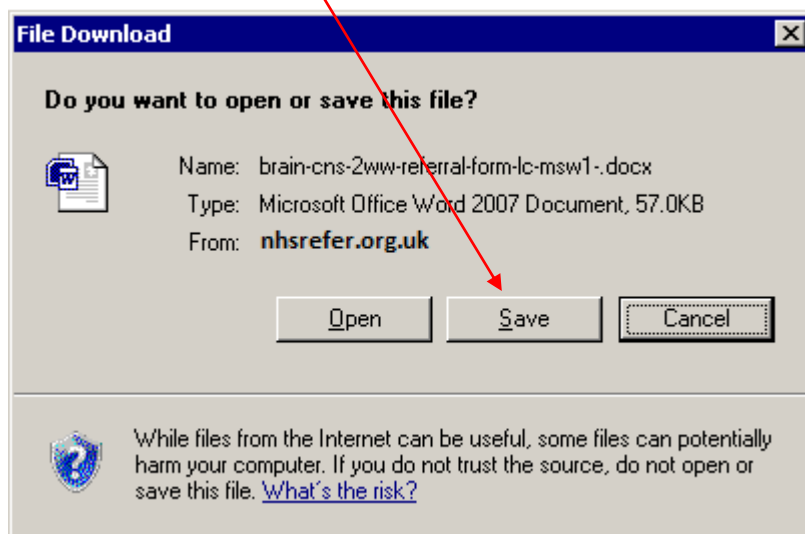
Download the referral form templates into the Pan London Suspected Cancer folder

1. Open **Internet Explorer** from the **Start menu** on the the Vision remote desktop.

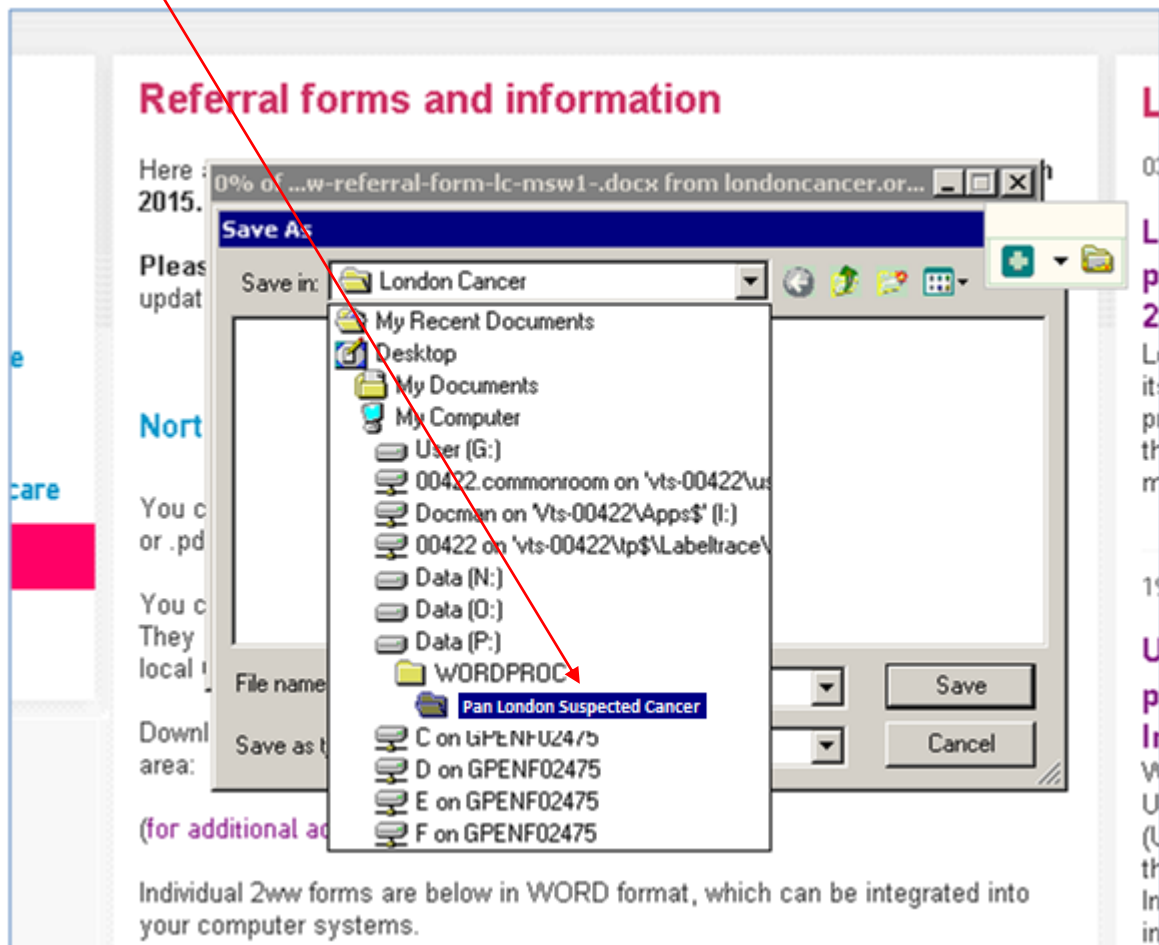


2. The forms are available from the pan London suspected cancer forms download site [here](#)

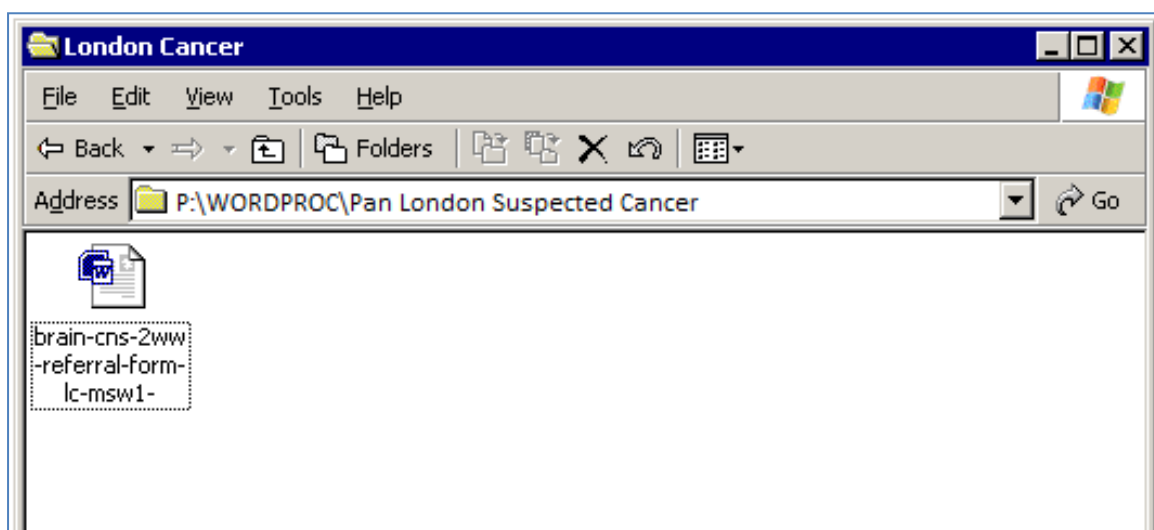
3. Find the web link to the form you wish to install and click on it. You will be asked if you wish to save the file. Choose **Save**.



4. A dialog box will open which asks you where you wish to save the files. Please select the **Pan London Suspected Cancer** folder.



5. The form you selected will now have been downloaded into the Pan London Suspected Cancer folder (see picture, below)



Altering a form

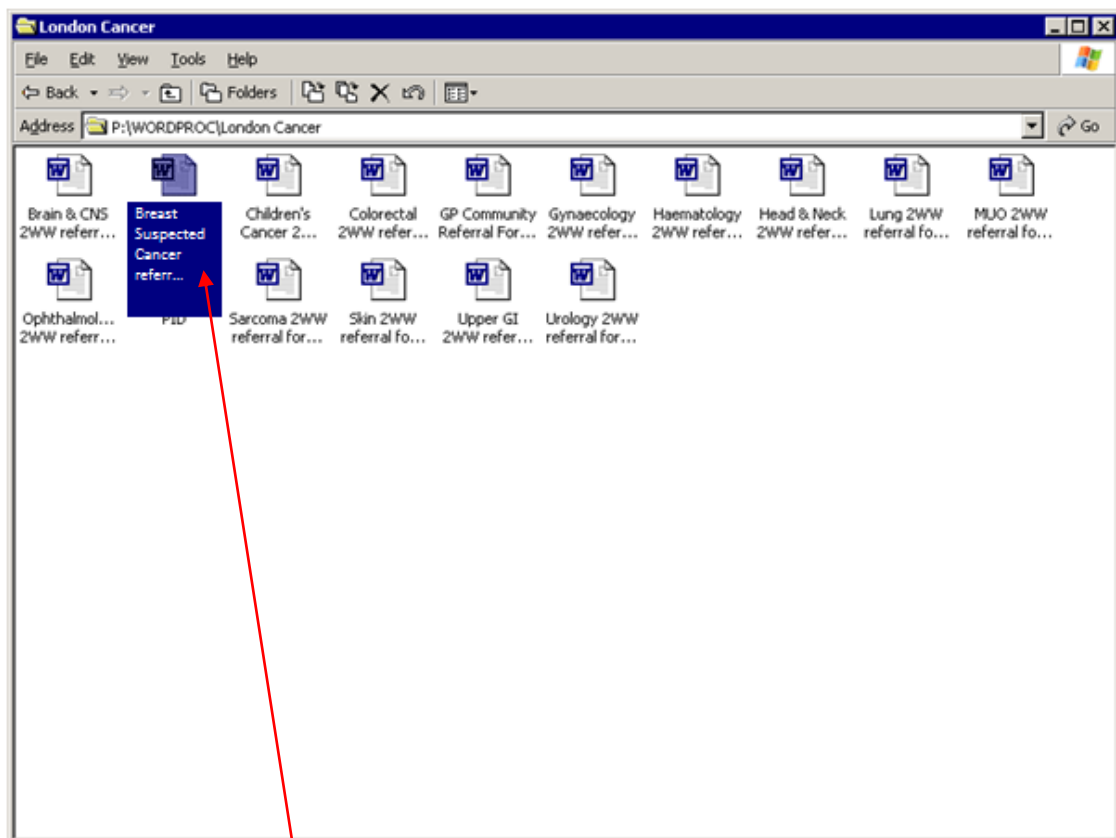
You will need to alter the form's word letter template because Vision does not have the ability to add your surgery's bypass telephone number (your surgery's private number, which is not for general release).

Of course, you can do this once you have generated a referral form. However GPs would have to do this each time they made a referral.

Adding this to the word letter template means GPs do not have to type it each time they make a referral.

How to open a form so that it can be altered...

1. Open the WORDPROC folder, which is located on the DATA P: drive of the Vision remote computer (see picture, below).



2. Select the referral form you wish to alter and double-click on it. It will open up in Microsoft Word, ready to be edited.


How to alter information on the form...

This is best illustrated by a practical example.




Example1

The commonest thing you will need to alter is to **add the surgery bypass telephone number** to the form. This is the surgery's private telephone number that is not given to patients.

You have to do this manually because Vision does not have a mail merge field for this.

Click once on the text box to the right of **BYPASS**  to highlight the text entry box.

Do not type directly over the box. This box is potentially machine-readable (with appropriate software installed) and typing over the box disables this function.

GP DETAILS	
USUAL GP NAME: Usual doctor	
PRACTICE NAME: Sender organisation name ★ PRACTICE CODE: Registered GP practice ID	
PRACTICE ADDRESS: Sender address building, Sender address road, Sender address locality, Sender address post town, Sender address county, Sender post code	
★ BYPASS 	
MAIN  : Registered GP phone number	FAX: Registered GP fax number ★ EMAIL: <input type="text"/>
REFERRING CLINICIAN: Sender name	

Instead, having highlighted the box, double-click on it. This displays the **Text Form Field** options dialog box (see picture, below).

★ <input type="checkbox"/> INTERPRETER REQUIRED ★ <input type="checkbox"/> TRANSPORT REQUIRED	
PATIENT ADDRESS: Patient address - single line	
★ DAYTIME CONTACT:	
HOME : Patient	Number
WORK : Patient	
★ EMAIL:	

Breast Clinic Referral
(Version: SONI1; 13

Page 1 of 3

GP DETAILS

USUAL GP NAME: Usual doctor

PRACTICE NAME: Sender organisation name ★ PRACTICE CODE: Registered GP practice ID

PRACTICE ADDRESS: Sender address building, Sender address road, Sender address locality, Sender address post town, Sender address county, Sender post code

★ BYPASS :

MAIN : Registered GP phone number FAX: Registered GP fax number ★ EMAIL:

Type the phone number in the text box labelled **Default text**.

Text Form Field Options

Text form field

Type: Regular text Default text:

Maximum length: Unlimited Text format:

Run macro on

Entry: Exit:

Field settings

Bookmark:

☒ Fill-in enabled

☐ Calculate on exit

Add Help Text... OK Cancel

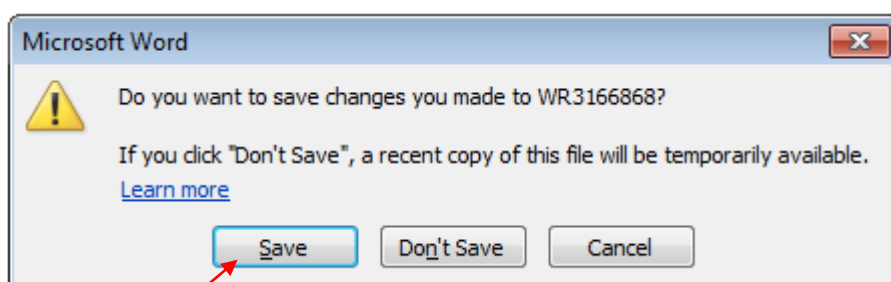
Click on the button labelled **OK**.

The telephone number is now transferred to the form.

GP DETAILS
USUAL GP NAME: Usual doctor
PRACTICE NAME: Sender organisation name ★ PRACTICE CODE: Registered GP practice ID
PRACTICE ADDRESS: Sender address building, Sender address road, Sender address locality, Sender address post town, Sender address county, Sender post code
★ BYPASS 📞: 01992 718 7183
MAIN 📞: Registered GP phone number FAX: Registered GP fax number ★ EMAIL: _____
REFERRING CLINICIAN: Sender name

You can now save your imported form. This will happen automatically when you attempt to close the imported word document.

You will be prompted to save the form (see below)



Click on **Save**.

Example 2

Other text areas can be freely altered by directly typing over the text. This applies to hospital names, telephone numbers and text in the clinical details section of the forms.

Please do not type over the **mail merge fields** (bounded by chevrons <<>>) as this will prevent them from working. Remember to delete either the <<MEDICAL_HISTORY>> or <<PROBLEMS>> mail merge field, depending on which method your practice uses to summarise major clinical problems.

When you close the document you will be prompted to save any changes you have made.

Displaying a form when making a referral

You must be in a patient's medical record in order to make a referral using one of the Pan London Suspected Cancer referral forms (see picture below).

The screenshot shows a medical software interface for a patient named Joe TEST, 9Y 4M, born 10/02/2006. The patient's address is 28 Tenniswood Road, Enfield, Middx, EN2 3LL. The interface is in 'OFFLINE' mode and shows a 'Copy of Copy of' document. The left sidebar contains a tree view of medical history items, including 'Pink Card', '1 Problems', '981 Consultation', '3 Drug Allergies & Adverse Reac', '16 Recalls and Reviews', 'Patient Preference', '390 Medical History', '670 Therapy', '21 Lifestyle', '36 Examination Findings', '54 Immunisations', '211 Miscellaneous', '31 All Test Results', 'New Registration Exam', '2 Child Health Surveillance', '1 Maternity', '30 HP Interventions', '4 Disease Registers', '24 Asthma', '1 Diabetes', 'CV or Hypertension', 'Epilepsy', 'Palliative Care', '1 Death Administration', '1 IOS Claims', and 'Superseded Records'. The main window displays a 'Summary Card' with a table of medical history items. A red arrow points from the 'Add Referrals' button (a red bow tie icon) to the 'Add Referrals' button in the toolbar.

Date	Description (Pink Card)
27/01/15	H _a Administration
28/10/14	H _s Housebound
09/10/14	H _a Refused consent for upload to national shar electronic rec
13/12/13	H _a Dissent from secondary use of GP patient identifiable data
04/12/13	H _d Diabetes mellitus
07/08/13	H _s Suspected breast cancer
17/05/13	H _p Giant bullous emphysema
01/08/12	H _d Asthma
13/08/10	H _s Anaphylactic shock - Prawns
30/06/10	H _d Essential hypertension
02/06/10	H _d Asthma
06/08/09	H _d Appendicectomy NEC
14/10/08	H _d Chronic lymphoid leukaemia
21/07/08	H _s Cough - AN
03/06/08	H _d Infective otitis externa Bilateral weepy ears
14/04/08	H _a Administration
23/01/07	H _d Essential hypertension

To make a referral, click on the Add Referrals button.



Remember to enter the correct Read code first!

Referral - Add

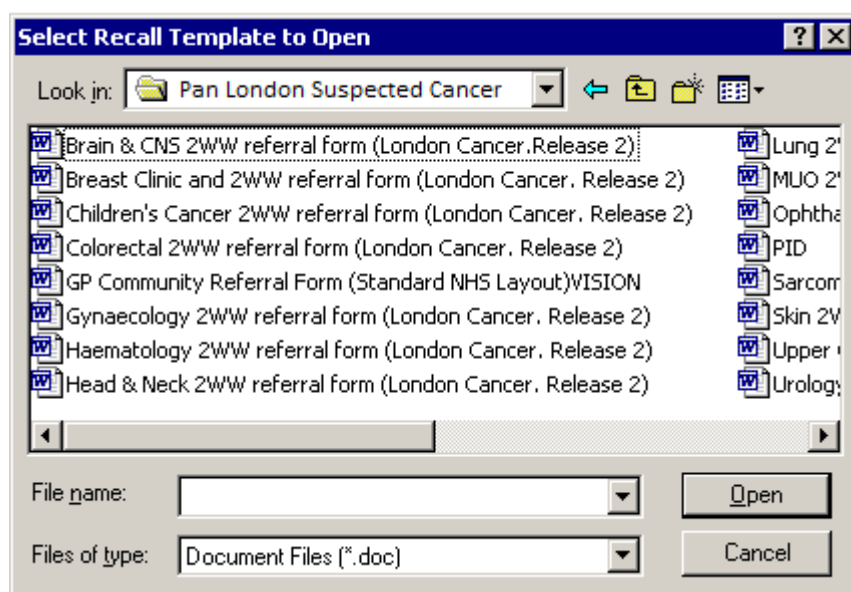
Date of Referral: 12 June 2015 Clinician: Woolf, Dr Gabi ☐ Private ☐ Online Booking Read Term for Referral Reason: [Redacted] Source: GP Referral Referral Type: Out Patient Attendance: <None>

Action Date: 03 July 2015 Status: <None> Booking Reference: [Empty]

Buttons: Notes, Letter

Then click on the button labelled **Letter**.

A dialog box will open, which allows you to choose the appropriate referral template (see picture, below).



Remember: these templates are stored in **Data P:\WORDPROC\Pan London Suspected Cancer**.

Select the appropriate referral form template.

Microsoft Word will open up the form you have chosen. Patient data and practice will have been automatically added.

Please note that unfortunately Vision does not have the ability to automatically add laboratory and imaging data.

This needs to be done manually using Microsoft Windows' copy and paste commands.

Selecting a hospital

The list of hospitals you are able to refer the patient to is accessed via a web link on the form.

Hold the control key down while you click on the link (see picture, below).

The screenshot shows a form titled "SUSPECTED BRAIN & CNS CANCER REFERRAL FORM". Below the title, there is a green highlighted text: "Press the <Ctrl> key while you click here to the Pan London Suspected Cancer Referral Support Guide". To the right of this text, it says "REFERRAL DATE: 03-Mar-2016". Below this, there is a box containing instructions: "Please email or send e-referral within 24 hours. Fax is no longer supported due to patient safety and confidentiality risks. Press the <Ctrl> key while you click here to view the list of hospitals you can refer to. Copy the hospital details from the webpage and paste them onto the line below." A red arrow points from the text "Hold the control key down while you click on the link (see picture, below)." to the link text in the box.

The list will be opened in your browser. What you see depends on the capability of your browser.

1. If you are using Internet Explorer version 8 or earlier (or older versions of FireFox or Opera) you will see the following screen (see picture, below)

The screenshot shows a web browser window titled "C:\Users\emis2000\Desktop\Pan London Hospitals\Brain and CNS.html - Internet Explorer, e...". The page content is titled "LONDON HOSPITALS TAKING REFERRALS FOR SUSPECTED BRAIN AND CNS CANCER" with a "Useful tip!" link. Below the title, there is a red text: "Sometimes hospital contact details change faster than we can keep up with them. So when you've sent your referral off, follow it up to make sure it's been received." The page lists four hospitals with their contact details:

Hospital Name	Email	Telephone	Fax
Barnet Hospital	mailto: RF-tr.bcf2weekwaitreferrals@nhs.net	tel: 020 7433 2973/4	fax: 020 7433 2950/1
Central Middlesex Hospital	mailto: lnwh-tr.CancerMdt@nhs.net	tel: 020 8235 4293	fax: 020 8235 4188
Charing Cross Hospital	mailto: 2WWSMH@IMPERIAL.NHS.UK	tel: 020 3312 1527	fax: 020 3312 1580
Chase Farm Hospital	mailto: RF-tr.bcf2weekwaitreferrals@nhs.net	tel: 020 7433 2973/4	

Using the mouse, select the hospital you wish to refer the patient two by clicking to the left of the hospital name, holding the left mouse button down and dragging the mouse the right to select the entire line (see picture, below)

LONDON HOSPITALS TAKING REFERRALS FOR SUSPECTED BRAIN AND CNS CANCER [Useful tip!](#)

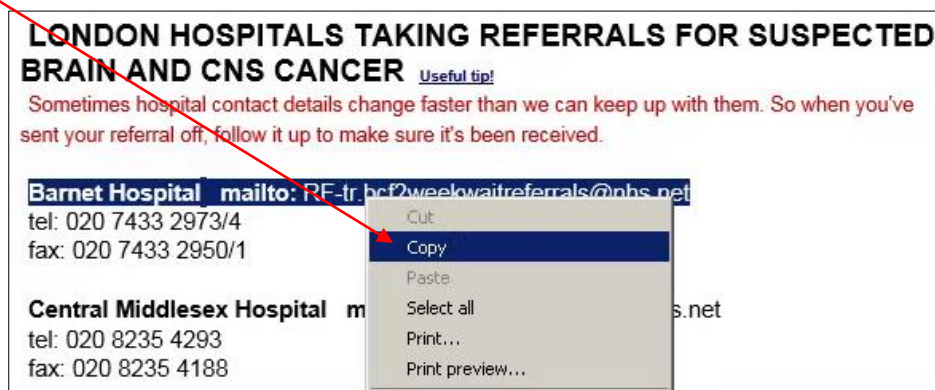
Sometimes hospital contact details change faster than we can keep up with them. So when you've sent your referral off, follow it up to make sure it's been received.

Barnet Hospital [mailto: RF-tr.bcf2weekwaitreferrals@nhs.net](mailto:RF-tr.bcf2weekwaitreferrals@nhs.net)

tel: 020 7433 2973/4

fax: 020 7433 2950/1

Having selected the entire line, right-click with your mouse and choose menu option **Copy** from the pop-up menu (see picture, below).



You can now close your browser down and **return to the form**.

2. If you are using Chrome or Internet Explorer versions 9 or later (or updated versions of FireFox or Opera) you will see the following screen (see picture, below).

LONDON HOSPITALS TAKING REFERRALS FOR SUSPECTED BRAIN AND CNS CANCER [Useful tip!](#)

Select your hospital from the list or search on text using the search box below.

Search:

Select hospital to refer to:

- 01. Barnet Hospital
- 02. Central Middlesex Hospital
- 03. Charing Cross Hospital
- 04. Chase Farm Hospital
- 05. Chelsea and Westminster Hospital
- 06. Croydon University Hospital
- 07. Ealing Hospital
- 08. Epsom Hospital
- 09. Guy's & St Thomas' NHS Foundation Trust
- 10. Hammersmith Hospital
- 11. Hillingdon Hospital
- 12. Homerton Hospital
- 13. King George Hospital
- 14. Kings College Hospital
- 15. Kingston Hospital
- 16. Lewisham Hospital
- 17. Mount Vernon Cancer Centre
- 18. Newham Hospital
- 19. North Middlesex University Hospital
- 20. Northwick Park and St Marks Hospitals
- 21. Princess Royal University Hospital
- 22. Queen Elizabeth (WOOLWICH)

Selected hospital:

Hospital:

email:

Tel:

Fax:

Notes:

Select hospital to refer to:

- 01. Barnet Hospital
- 02. Central Middlesex Hospital
- 03. Charing Cross Hospital
- 04. Chase Farm Hospital
- 05. Chelsea and Westminster Hospital
- 06. Croydon University Hospital
- 07. Ealing Hospital
- 08. Epsom Hospital
- 09. Guy's & St Thomas' NHS Foundation Trust
- 10. Hammersmith Hospital
- 11. Hillingdon Hospital
- 12. Homerton Hospital
- 13. King George Hospital
- 14. Kings College Hospital
- 15. Kingston Hospital
- 16. Lewisham Hospital
- 17. Mount Vernon Cancer Centre
- 18. Newham Hospital
- 19. North Middlesex University Hospital
- 20. Northwick Park and St Marks Hospitals
- 21. Princess Royal University Hospital
- 22. Queen Elizabeth (WOOLWICH)

Select the hospital you wish to refer the patient to from the list on the left hand side of the screen (see picture, left).

If you can't find the hospital easily in the list, use the search box to help you find it more quickly (see picture, below).

Select your hospital from the list or search on text using the search box below.

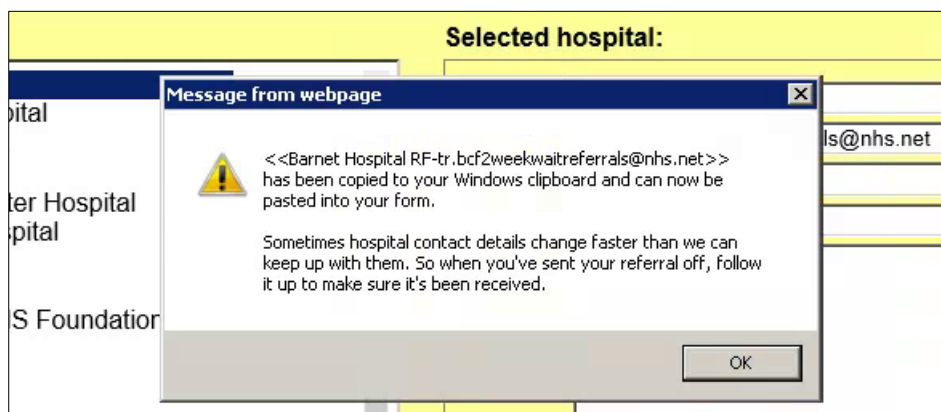
Search:

The contact details of the hospital you have selected appear in the box on the right-hand side of the screen (see picture, right).

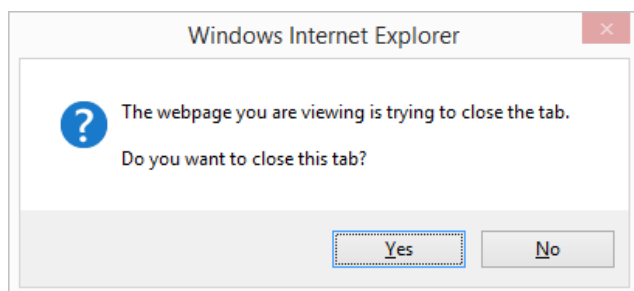
Click the button labelled **Copy selected hospital to Windows clipboard**. This will copy the hospital name plus the email address only (see picture, below).

Selected hospital:

Hospital:	<input type="text" value="Barnet Hospital"/>
email:	<input type="text" value="RF-tr.bcf2weekwaitreferrals@nhs.net"/>
Tel:	<input type="text" value="020 7433 2973/4"/>
Fax:	<input type="text" value="020 7433 2950/1"/>
Notes:	<div style="border: 1px solid black; height: 80px; width: 100%;"></div>
<input type="button" value="Copy selected hospital to Windows clipboard"/>	



Having copied the required details and depending on the capability of your browser, you may be offered the option to close the current tab.



If you select Yes, and there are no other tabs open in your browser, the browser will close and you will return to your referral form. If there are other tabs open, you will need to return to your referral form manually.

The **referral form** has a line into which you can paste the copied hospital details.

Right-click on the form in this area (see picture, below)...

PAN LONDON SUSPECTED BRAIN & CNS CANCER REFERRAL FORM
Press the <Ctrl> key while you click here to view the Pan London Cancer Referral Support Guide

REFERRAL DATE:

Please email or send e-referral within 24 hours.
Fax is no longer supported due to patient safety and confidentiality risks.
Press the <Ctrl> key while you click here to view the list of hospitals you can refer to
Copy the hospital details from the webpage and paste them onto the line below.

PATIENT DETAILS

...and select the **first choice** from menu option **Paste Options**: from the popup menu (see picture, below)

TRANSFER, Ann (Miss) Born 01-Apr-1970 (45y) Gender Female EMIS No. 27225
Usual GP MARKS, Anthony (Dr)

Insert Page Layout References Mailings Review View Developer

Font Paragraph

SUSPECTED BRAIN & CNS CANCER REFERRAL FORM
Press the <Ctrl> key while you click here to the Pan London Cancer Referral Support Guide

Please email or send e referral within 24 hours.
Fax is no longer supported due to patient safety and confidentiality risks.
Press the <Ctrl> key while you click here to view the list of hospitals you can refer to
Copy the hospital details from the webpage and paste them onto the line below.

PATIENT DETAILS
SURNAME: Test Transfer FIRST NAME: Ann TITLE: Miss
GENDER: F DOB: 01-Apr-1970 NHS NO: Unknown

Calibri (T) 9

You can achieve the same result by pressing the keyboard combination **Ctrl + V**.

The hospital you selected, plus associated contact details, will now appear in the box on the form (see picture, below).

SUSPECTED BRAIN & CNS CANCER REFERRAL FORM

Press the <Ctrl> key while you click here to the Pan London Cancer Referral Support Guide

REFERRAL DATE: 29-Jan-2016

<p>Please email or send e referral within 24 hours. Fax is no longer supported due to patient safety and confidentiality risks. Press the <Ctrl> key while you click here to view the list of hospitals you can refer to Copy the hospital details from the webpage and paste them onto the line below. Barnet Hospital RF-tr.bcf2weekwaitreferrals@nhs.net</p>

PATIENT DETAILS

Local circumstances will dictate how you send the document via email. Whichever email client you are provided with, the hospital name and email address will remain on your Windows clipboard (provided you don't copy anything else in the meantime), ready for you to paste it into the **To** line of your email client.