Downloading and Using “NW London Planned Procedures with a Threshold” Templates

Introduction

The North West London Planned Procedures with a Threshold (PPwT) templates allow you to create referral letters as Word documents that meet the requirements for the North West London Individual Funding Requests (IFR) Service. The templates automatically extract data from the patient record to produce a referral letter that can then be edited.

The templates are available for you to download from the INPS website if you have your own server, for Managed Server sites we have downloaded them for you. This only needs to be done once, and can be done from any workstation.

What you need to do…

Before using the PPwT templates you must:

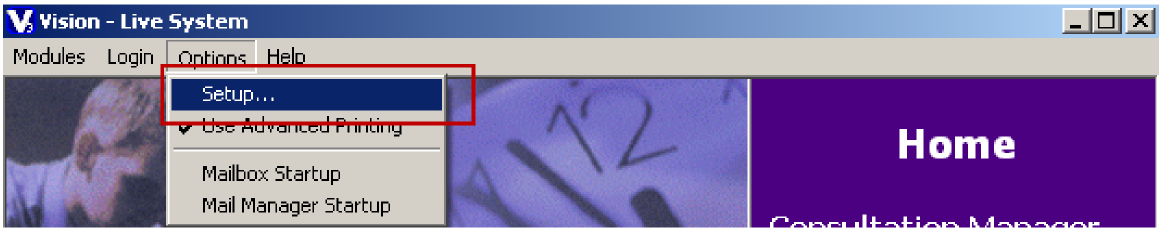
- Check you have the correct Word Processor selected in Vision. See “Word Processor Settings” on page 2.
- Check your merge field options settings. See “Merge Field Options” on page 3.
- Check your practice address details are set up correctly. See “Practice Address Details” on page 5.
- Download the PPwT templates. See “Downloading the PPwT Templates” on page 5.
- Add your National Practice Code to the template letters. See “GP Practice Code” on page 6.

Word Processor Settings

The word processing facilities available within Vision are either Microsoft Word or Vision Editor. You need to ensure you have Microsoft Word selected to be able to use the PPwT templates.

To check which word processor is selected:

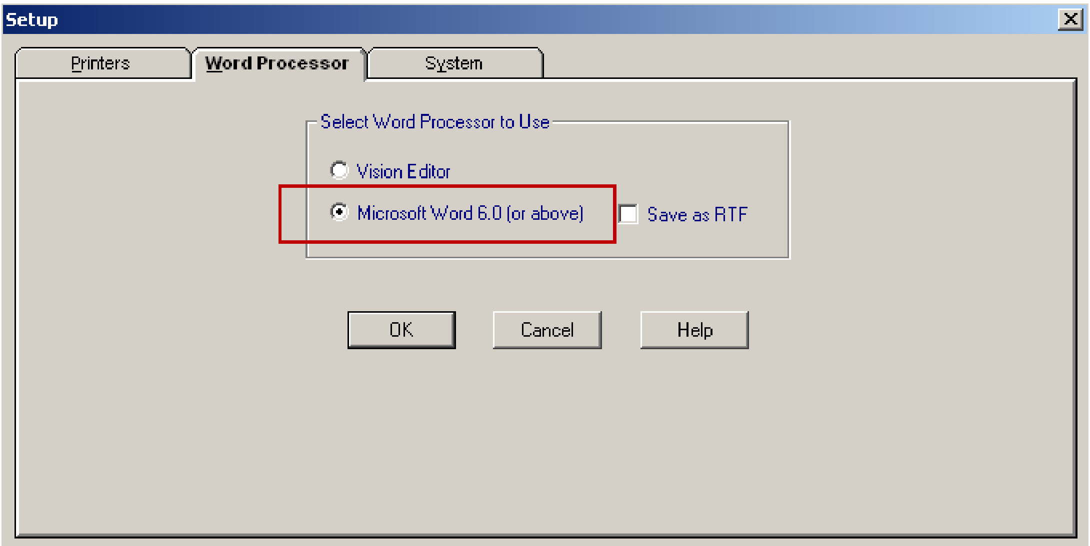
1. From the Vision Main Menu, click on **Options – Setup**



Vision Main Menu – Options - Setup

2. Click on the **Word Processor** tab.
3. In the Select Word Processor to Use section, make sure that **Microsoft Word 6.0 (or above)** is selected.

Note – Any templates written in Vision Editor will need to be recreated within Microsoft Word if you make this change.



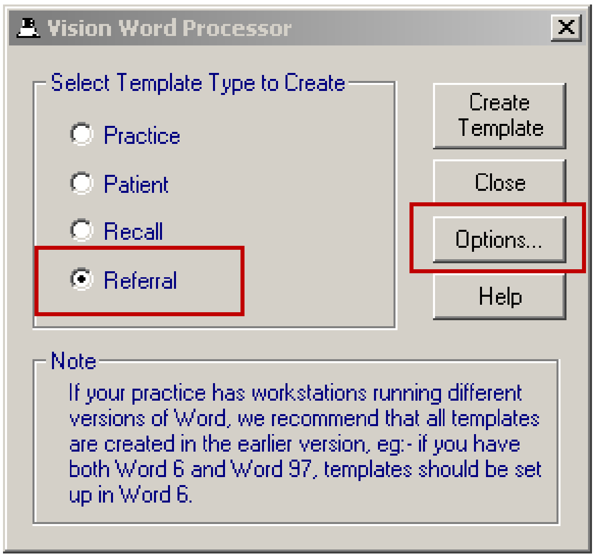
Setup – Word Processor – Microsoft Word 6.0 (or above) selected

4. Click **OK** to save and close.

Merge Field Options

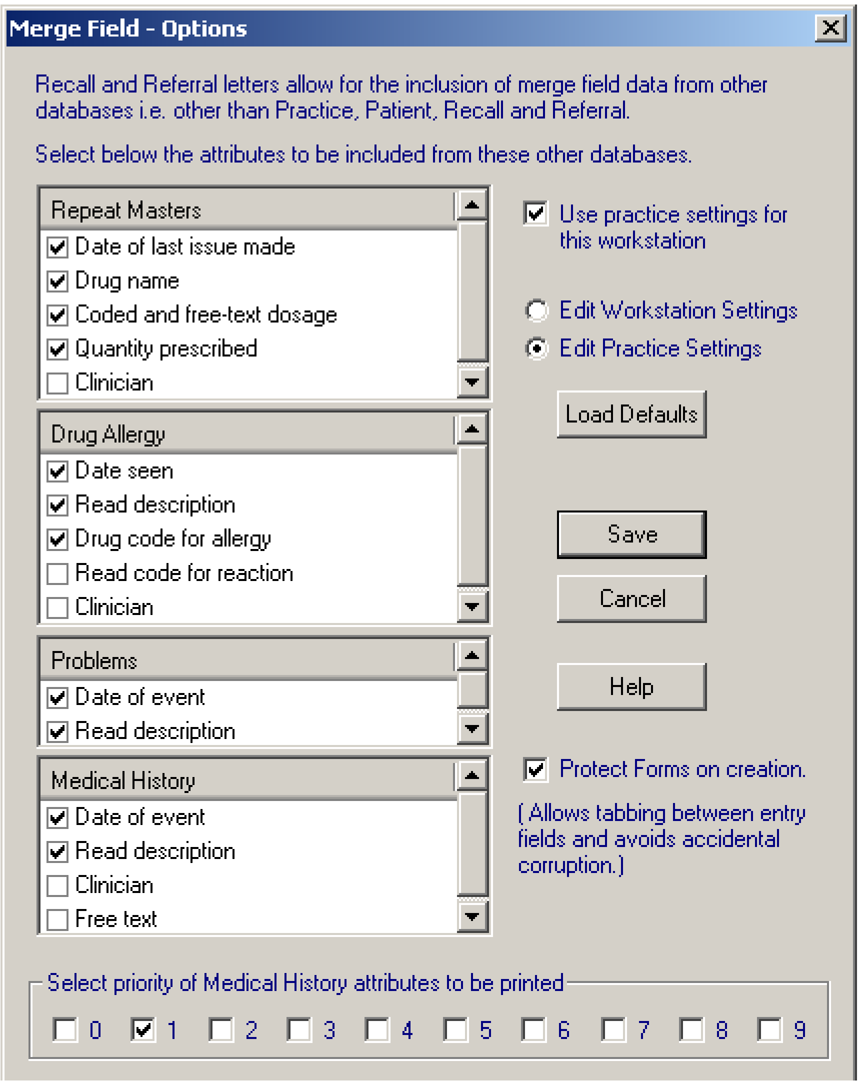
It is important that the correct information is merged into the PPwT referral templates. To check the merge field options are set correctly:

1. From the Vision Main Menu, select **Utilities – Word Processor**.
2. Select **Referral** and click on **Options**.



Vision Word Processor screen with Referral and Options highlighted

3. On the Merge Field – Option screen:
   - Check you only have ticks in Priority 1 (and 2 if necessary).
   - Remove the **Clinician** tick from the **Repeat Master**, **Drug Allergy** and **Medical History** sections.
   - Remove the **Free text** tick from the **Medical History** section.



Merge Field – Options

4. Click on **Save**.
5. Click on **Close**.

Practice Address Details

Note – The following may have to be done by a System Administrator depending on the set up at your practice.

Check your practice name and address details are set up correctly in Vision. These details merge on the PPwT templates. To check the details:

1. From the Vision Main Menu, select **Management Tools** - **Control Panel**.
2. Select File Maintenance and click on **Practice** 

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3. Click on the **Addresses** tab and check the details.
4. If the address details need updating, click 

and change as required.
5. Click **OK** to save.

Downloading the PPwT Templates

To use the PPwT templates, they must first be downloaded into Vision:

1. From the INPS website, click on **My Vision**.

Option tabs within the INPS website, My Vision highlighted

2. Click on **User Assistance**, and then from **Regional Assistance** select **London**.
3. Click on **NWL PPwT Templates**.
4. A File Download screen displays, click **Run**.
5. The templates automatically unzip.

Note – Please observe the message warning you <u>not</u> to change the folder to which the templates unzip.

6. Click **Unzip**.
7. At the WinZip Self Extractor screen, confirming the file was unzipped successfully, click **OK**.
8. Click **Close**.

The templates are now available to all users.

GP Practice Code

The PPwT Templates need to include your GP Practice Code. The GP Practice Code is not available as a merge field we therefore recommend the following steps to save you having to add it to each letter:

1. From the Vision Main Menu, select **Utilities – Word Processor**.
2. Select **Referral** and then click on **Create.**
3. Select **File - Open** and double click on the **NWL PPwT Templates** folder.
4. For each referral letter:
    - Double click to open the template.
    - Click next to the GP Practice Code within the Referrer section and enter your GP Practice Code.

REFERRER	
Name	«PATIENT_Registered_GP»
Address	«PRACTICE_BlockAddress»
GP practice code	
Telephone	«PRACTICE_Main_Comm_No»
Fax	
E-mail	
Date of referral	«SYSTEM_Date»

Referrer section from the Dental PPwT with the GP Practice Code highlighted

- Click to save the change.
- Click to close.

Note – Your practice Fax number and email address can also be added this way.

Using the PPwT Templates

The PPwT templates should be used for IFR referrals to the relevant services. For further information about IFR referrals please refer to:

www.northwestlondon.nhs.uk/IFR

For more information about the service please email ppwtnw.london@nhs.net

Or call on 020 3313 9462 or refer to the pack that has been sent to you from Dr Mark Spencer, Clinical Director, NHS NWL

Creating a Referral Using the North West London PPwT Templates

To create a referral letter:

1. From Consultation Manager, enter your consultation.
2. Click on entry you are referring, hold your click and drag and drop on to the bow tie icon on the Floating Tool bar that appears.

Floating tool bar with bow tie icon highlighted

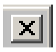
3. Select the **Provider Unit** (Hospital) and **Department** from the available list.

Note - If the Hospital or Department required is not available, you can add them. See "Setting up Hospitals, Departments and Consultants in Control Panel" on page 10.

4. Click on  .
5. Double click on the folder for **NW London PPwT templates**.
6. INPS have been provided initially with the templates for the most common procedures with a threshold, other may be available at a later date.
7. Double click on the relevant folder for the referral you are creating, and then double click on the template required.
8. The template opens in Microsoft Word.
9. Check all the required data has transferred into the template letter.
10. Click into the boxes for **Email**, **Language**, **Ethnicity** and **Trust** and type in the details required.
11. Tick the boxes that apply to your referral.

12. To add extra information to the current consultation, past medical history, repeats and allergies, click into the grey bar below each section and type.
13. To amend or delete parts of the medical history, repeats or drug allergy sections, you must unprotect the letter first. To unprotect the letter:
    i. Click on **View – Toolbar – Forms**.
    ii. A small toolbar appears, click on the Protect Form icon to unprotect the document.

Forms toolbar with Protect Form icon highlighted

    iii. Type in your text, amend or delete as required.
    iv. Protect the document when you have finished amending and/or deleting by clicking on the Protect Form icon again.
14. Click on the Printer icon to print the letter.
15. Click on  to close Word.
16. Click on **Yes** to save the letter to the patient's notes.
17. The Referrals screen is re-displayed. The Letter icon now contains a red tick 

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18. Click **OK** to save and close the referral form.

Sending a Referral Letter by Email

On a LAN site using Microsoft Outlook

1. Follow steps 1 – 12 as above to create the referral letter.
2. Click on **File – Send To – Mail Recipient**.
3. Microsoft Outlook opens ready for you to enter the email address of the recipient, remember these templates MUST be sent by NHS Mail.
4. Once the email address is entered, click on **Send**.

On a hosted server (VES)

1. Follow steps 1. – 12. as above to create the referral letter.
2. Click on **File – Save As**, and save the letter somewhere easy to find ie My Documents.

Note – Do not rename the letter unless you are saving multiple letters, for different patient's, before attaching them to an email, in which case you need to identify which letter is which.

3. Open your NHS net email account and attach the letter from the folder that you saved it in.

4. Remember that the letter contains patient identifiable data and should not be stored on your workstation so please delete the letter after you have sent it. A copy will be stored in the patient record for future reference.

Appendix 1

Setting up Hospitals, Departments and Consultants in Control Panel

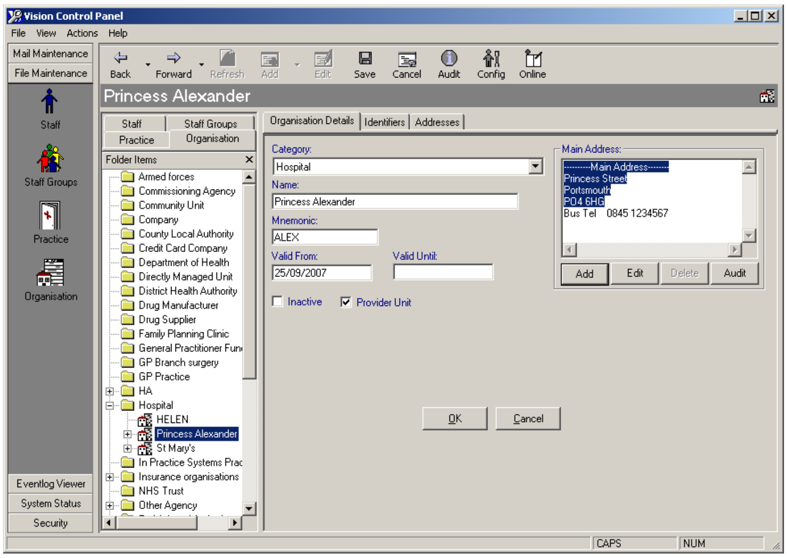
Note – The following may have to be done by a System Administrator depending on the set up at your practice.

When entering a referral, if the Hospital or Department that you require is not available on the drop down list you need to add them to Vision. To add a new Hospital or Department:

1. From the Vision Main Menu, select **Management Tools - Control Panel**.
2. Select **File Maintenance** and click on **Organisation.**

To add a Hospital

3. Click on **Hospital**.
4. Right click and select **Add Organisation**.
5. Enter the hospital name into **Name**, and add a **Mnemonic** (Initials).
6. Click on **Add** and type in the address of the Hospital.
7. Click on **OK**.
8. Click on **Add Contact Number** and type in the telephone number.
9. In **Type of Contact** select Business.
10. Click on **OK** to save the contact number.
11. Click **Close** and then **OK** to save and close the new Hospital.



Vision Control Panel

To add a Department

3. Click on the Hospital that you need to add the Department to.
4. Right click and select **Add Department**.
5. Choose from the **NHS Speciality** list ie Cardiology.
6. Choose from the **HA Speciality** list ie General Medical.
7. Enter the department name into **Name** ie Cardiology Department.
8. Enter a Mnemonic ie SCARD (initial of hospital and dept – e.g. Singleton Cardiology).
9. Click on **OK.**

Further Guidance

For more detailed instructions on setting up organisations please refer to the INPS website www.inps.co.uk - My Vision - User Assistance - User Guides - Management Tools - Control Panel.

For additional instructions on creating referrals; please refer to the INPS website www.inps.co.uk - My Vision - User Assistance - User Guides - Practice Administration - Referrals and Correspondence.

On–Screen help is also available within Consultation Manager for the referrals and within Control Panel for setting up organisations.