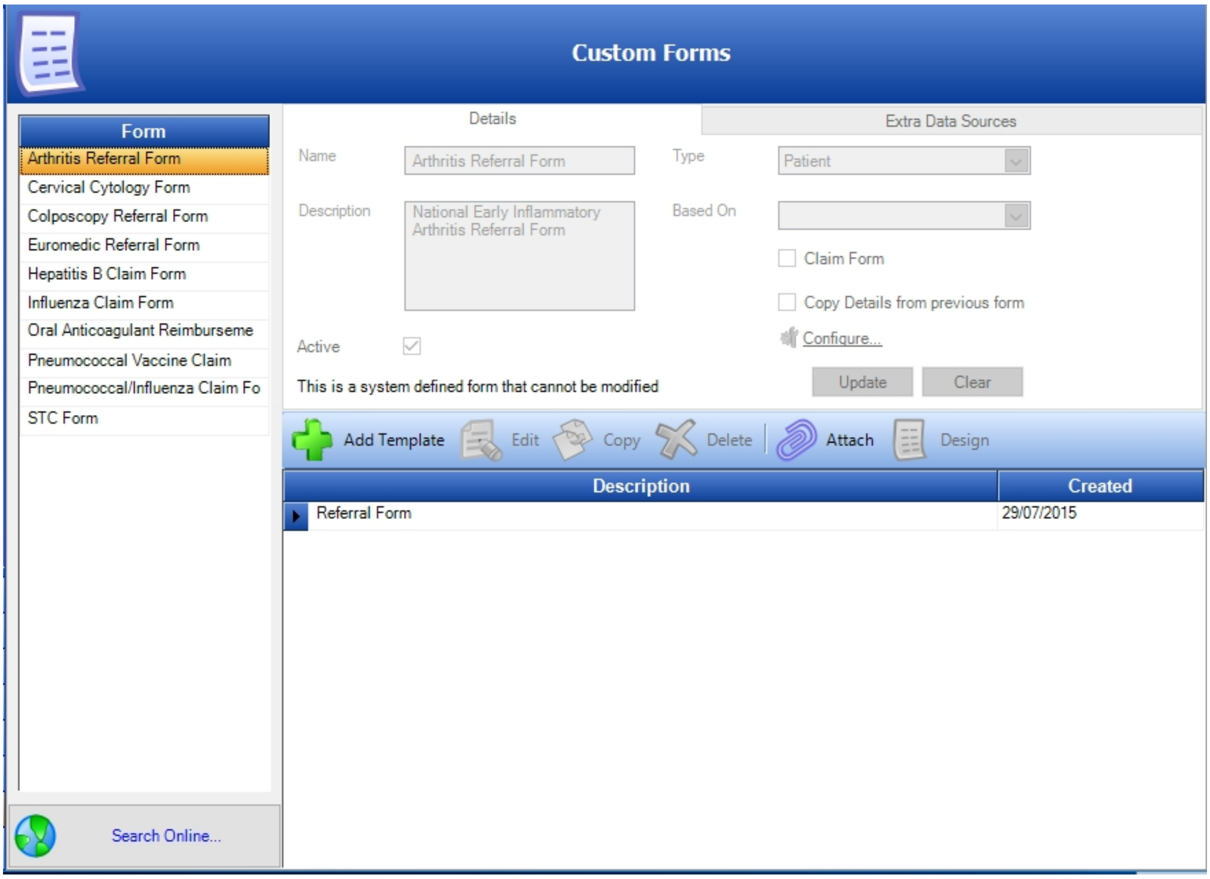
Custom Forms Overview

To access Custom Forms, Click **My Control Panel > Admin Console > Custom Forms.** This will open the following window. The list along the left will list any forms that exist in the system. Selecting any item from the list will load its details on the right side of the screen.



A) Details Tab

- The name field should provide a meaningful name of what the Custom Form is for.
- The description field should provide a meaningful description of what the form is used for and is optional. The active field determines if the Custom Form is available within a patients chart or not.
- The type field describes what data is to be passed into the Form. This can not be edited once the form is created.

There are 3 types of forms that can be created which are as follows:

1. **Patient Form**

This type is used when you only need to add patient details to the form e.g. patient demographics, HCP details , last recorded Baseline etc..

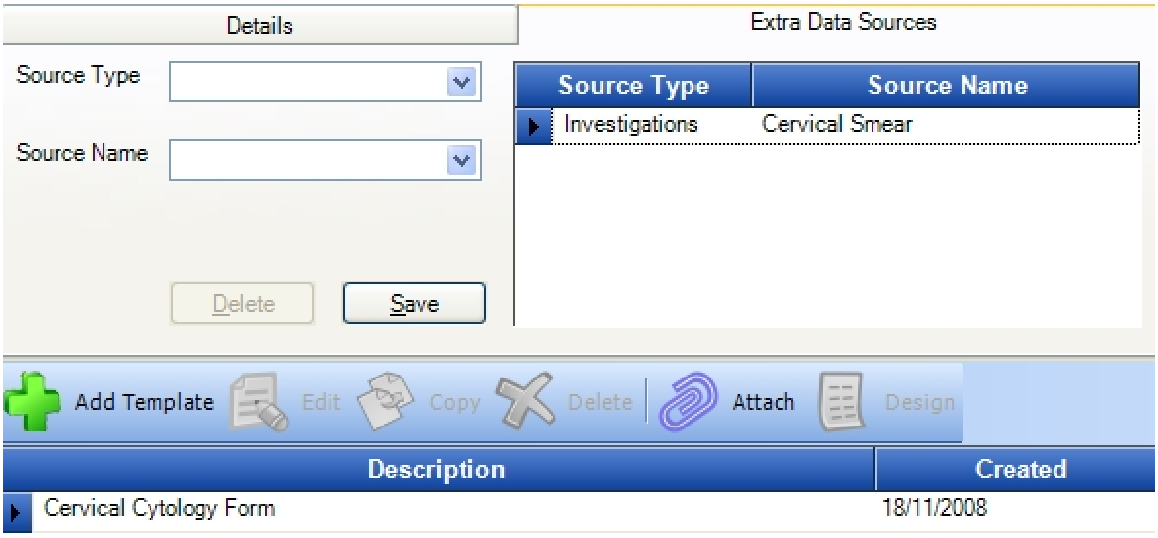
2. **Immunisation Form**

This type is used when you want to add patient and Immunisation details to the form e.g. shot, date administered, batch number and expiry date etc.

3. **Investigation Form**

This type is used when you need to add patient details and the details of a particular Investigation. The **Based On** field is required when the type selected is **Investigation** and should contain the name of the Investigation the form is based on. This type is used for the system investigation for the Cervical Cytology Form and the Sick Cert Form.

B) Extra Data Sources Tab

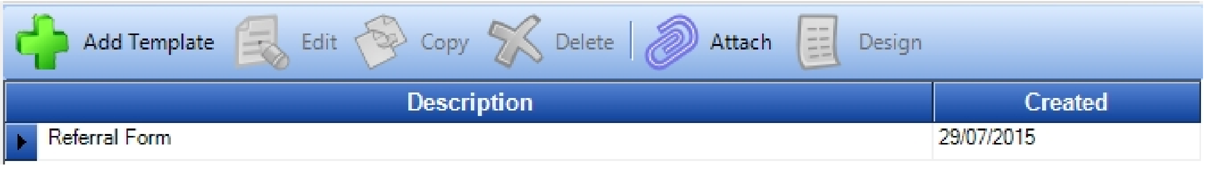


The Extra Data Sources allow you to attach multiple external data sources to the custom form when designing a template. What this means is you can feed in extra information from the patients chart based on the 'Source Type' field. Currently Socrates has just one Source Type which is Investigations. For example, the form shown above provides Cervical Smear results to the Cervical Cytology forms.

This means that you can list all past Cervical Smear results on any template based on this custom form. When you add this form to a patients chart it scans their chart for any occurrences of these extra data sources and provides the data to the templates.

Templates

The bottom section of the window provides a list of the templates attached to the selected custom form.

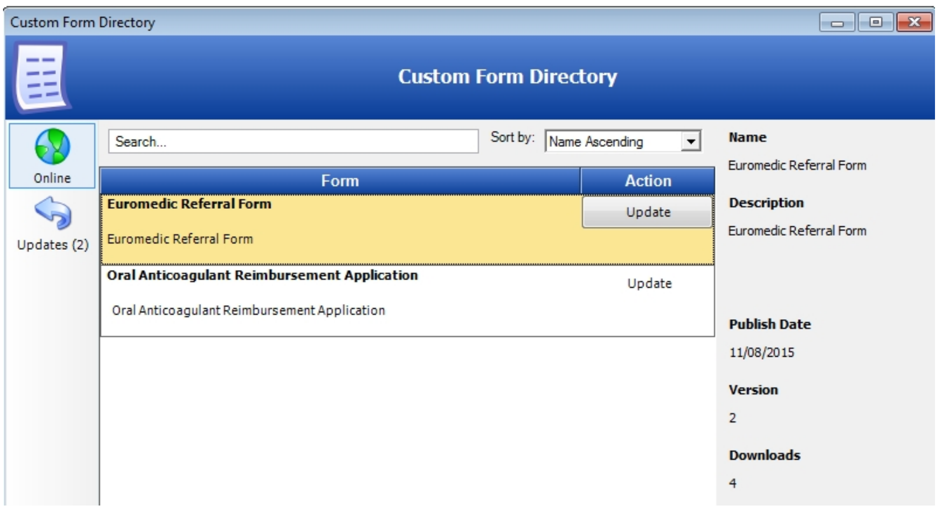


1. Add Template - This allows you to add a new template to the custom form.
2. Edit - Allows you to edit the name of the selected template.
3. Copy -Allows you to make a copy of the selected template and add it as a new template. This can be useful and speed up template creation if you need to provide the same information on a form but the alignment or paper size needs to be adjusted.
4. Delete - Deletes the selected template.
5. Attach - Allows you to attach an external template to the custom form. External templates could be provided to you by another practice if you wished to share them or by Socrates support. There are certain limitations to sharing templates as a result of different investigations being used in different regions of the country and each having unique IDs within each practice.
6. Design - Opens the Template Designer Studio to create or modify the template.

Online Form Library

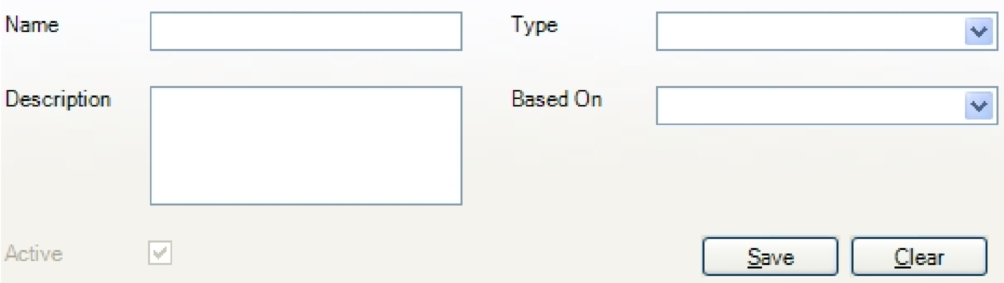
There is a Web Service available where you can search online for available custom forms. Click **Search Online** button to begin.

The Custom Form Directory displays a list of new and updated forms which you can download.

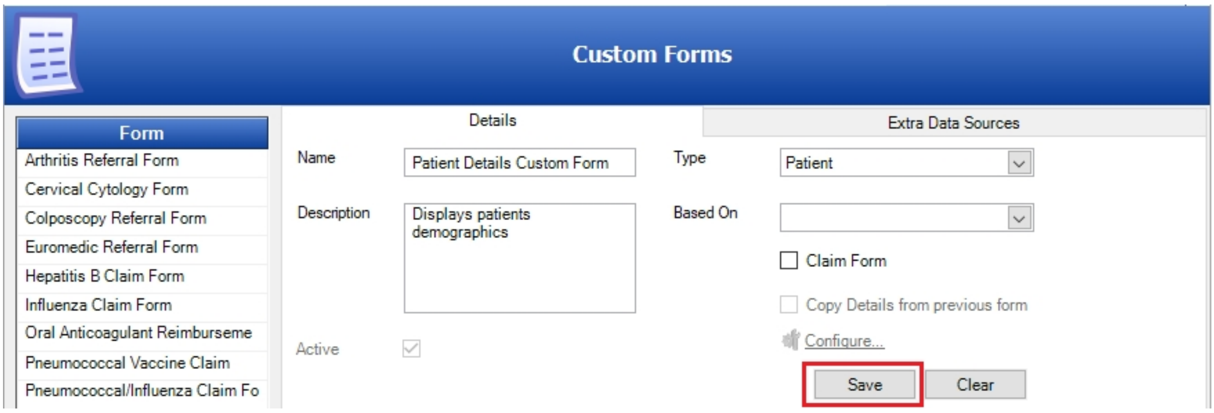


Create Custom Form

To create a new custom form first make sure any selected custom forms are cleared by clicking the clear button.

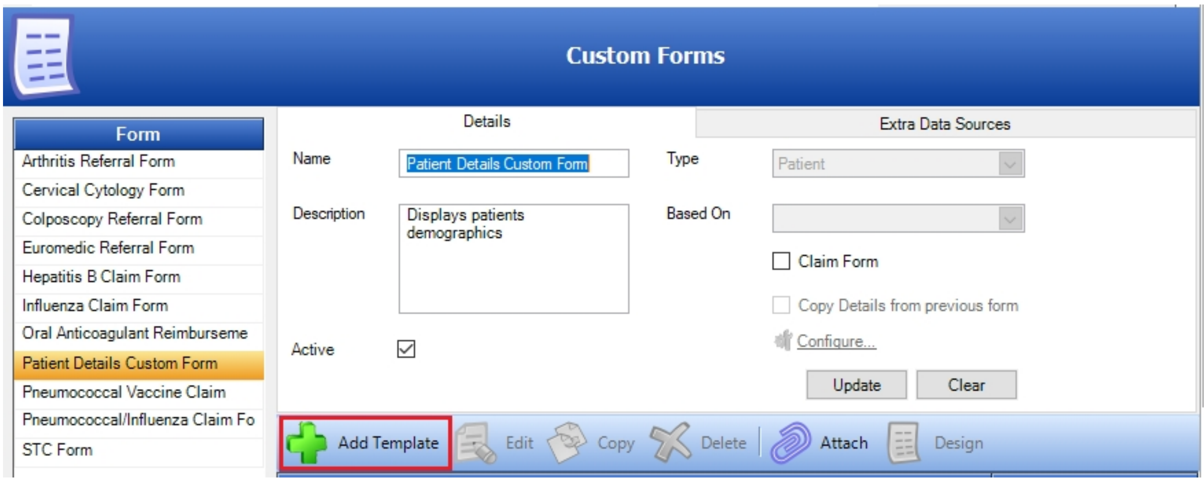


1. Enter a Name and a brief description for the Custom Form and select a Type e.g. 'Patient' as the form type.



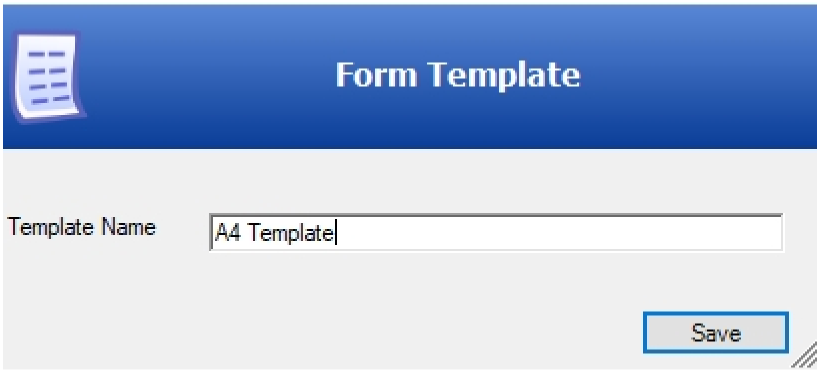
2. Click **Save** to create this new Custom Form.

The new custom form should now be created and automatically selected from the left pane. Next, create a template for this custom form.

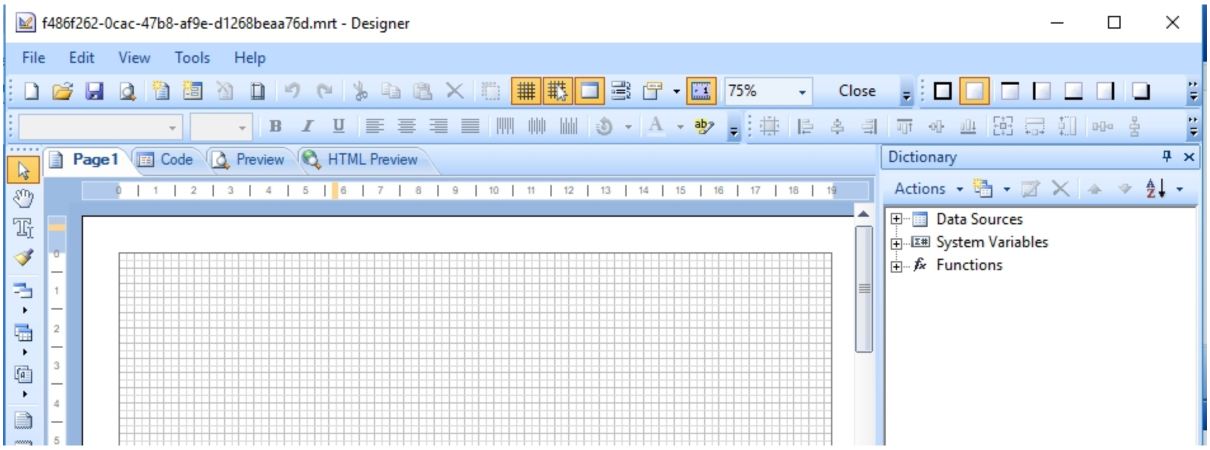


Create Template

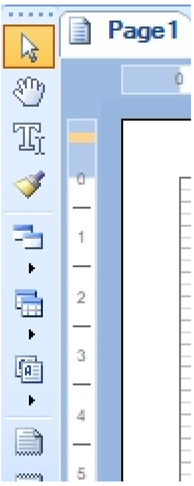
1. Click the ‘Add Template’ button and enter the name for the Template e.g. Based on Paper Size or user etc.



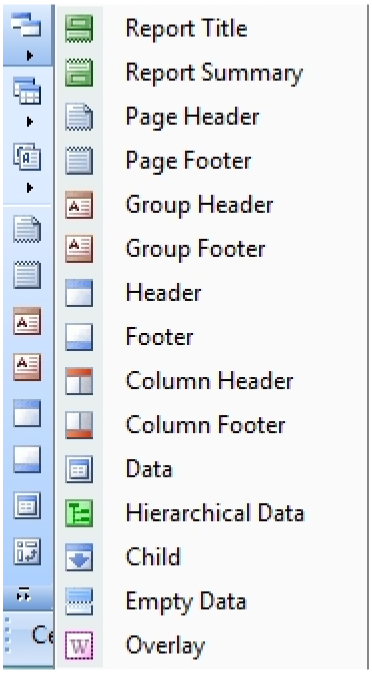
2. Click **Save** to create this blank template and open it in Designer Mode.



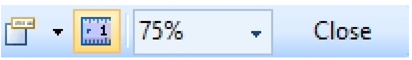
The Template Designer Studio is a feature rich designer tool to create very sophisticated layouts. On the left you have a tool strip that contains many tools available for designing your template.



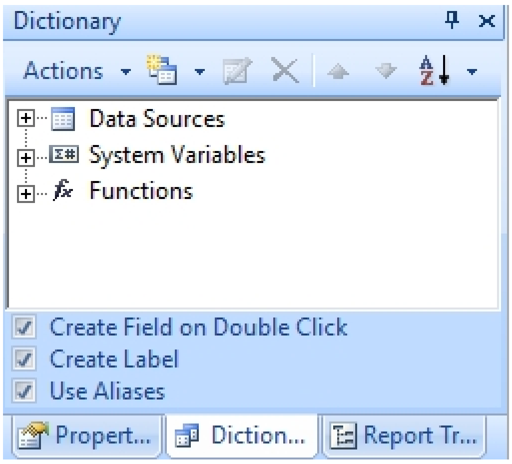
Hover over each icon to display its Name, click the arrow underneath to expand each set of icons e.g. Under Bands you have the following menu items.



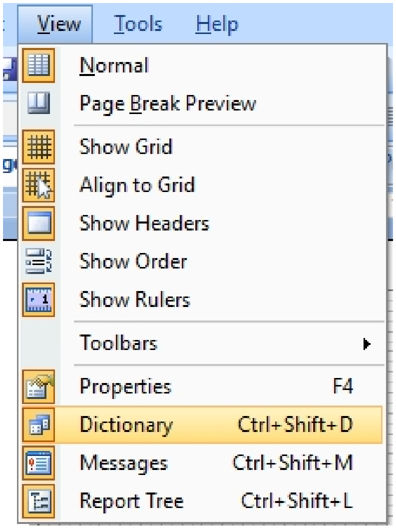
The design page allows you to build your template. The page zoom level can be changed by using the zoom box toward the top of the window.



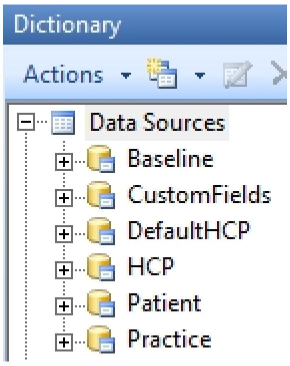
On the right you have the Dictionary list which holds all the data sources provided to the template.



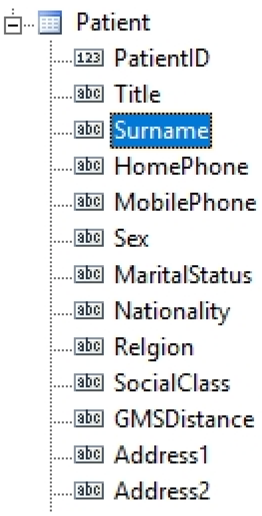
Should this menu not be displayed go to **View** on the main menu and select Dictionary.



Expand the Data Sources tree by clicking the + icon.

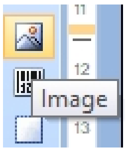


There are the items that can be pulled onto the form. Expand each data source further to view the merge fields that can be added.

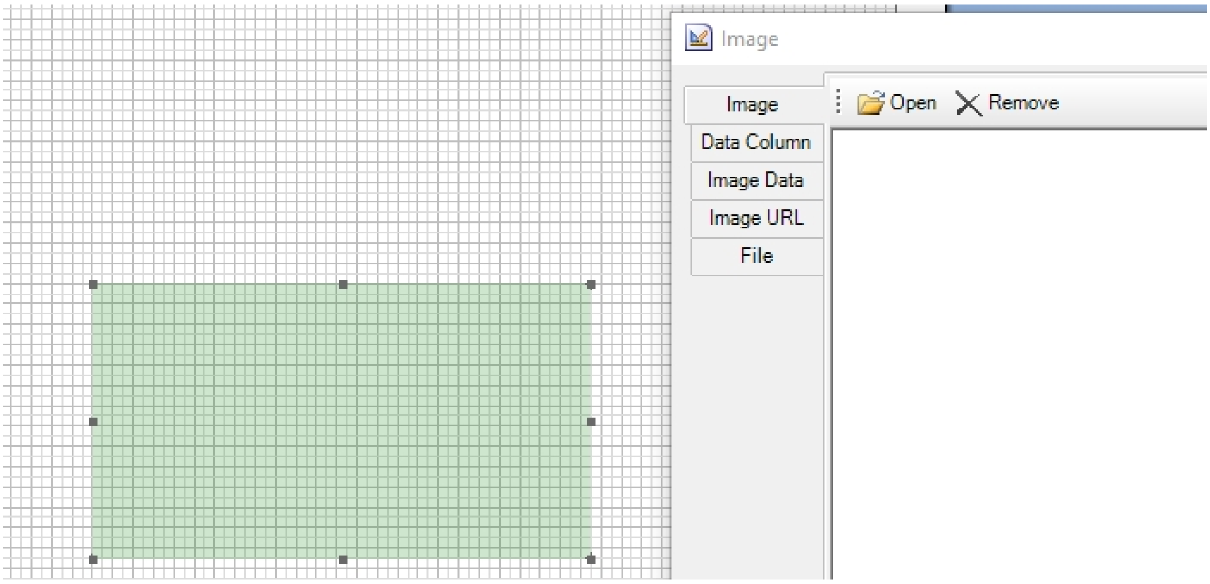


Add Background Image

Select the Image icon from the toolbar [It will be highlighted in orange] then click on the Design Page and draw the area where you want the image to be placed.



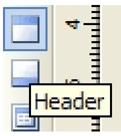
Click **Open** and select the image to add.



Use the properties on the right hand side to stretch the image etc.

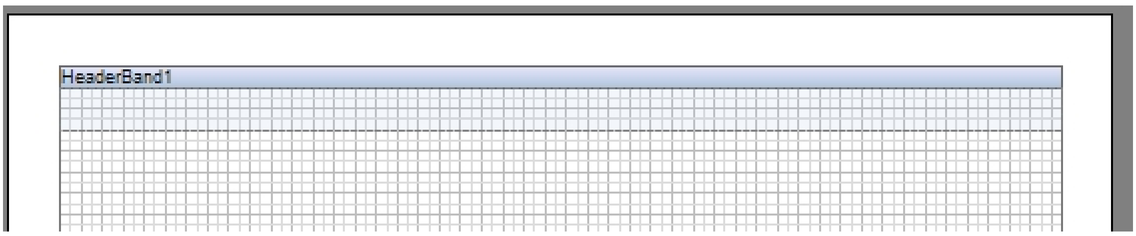
Add header

To place a header on the page, you need to select it from the tool strip on the left and drag it onto the page. The Header icon looks like this:

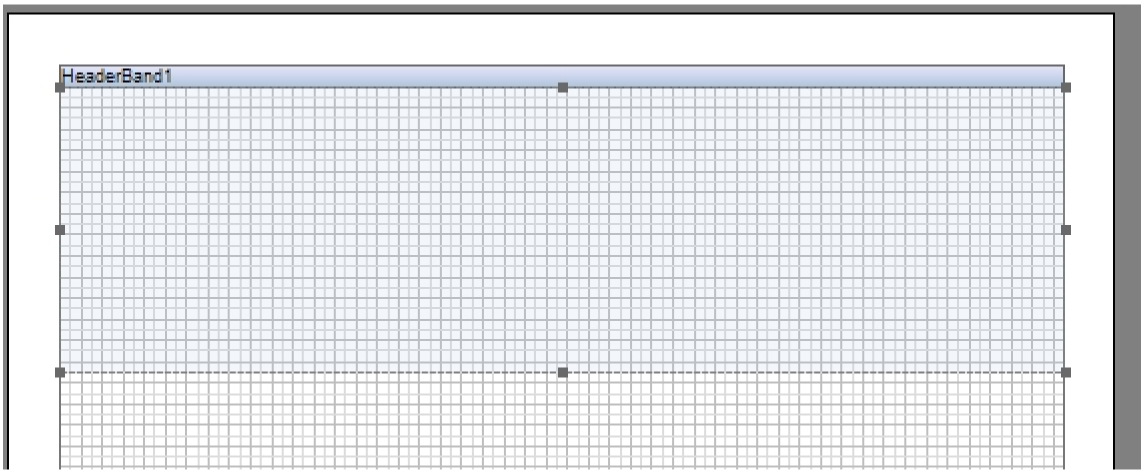


The blue box highlights the Header

By dragging this onto the page you should now see something like below:

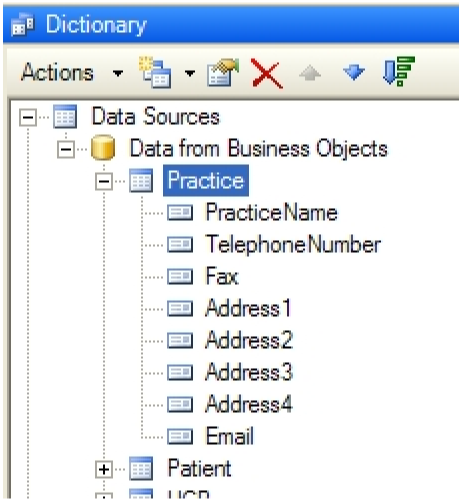


3. Resize the Header Band to make it larger. To do this, grab the dotted line by holding the left button on your mouse and drag downwards.



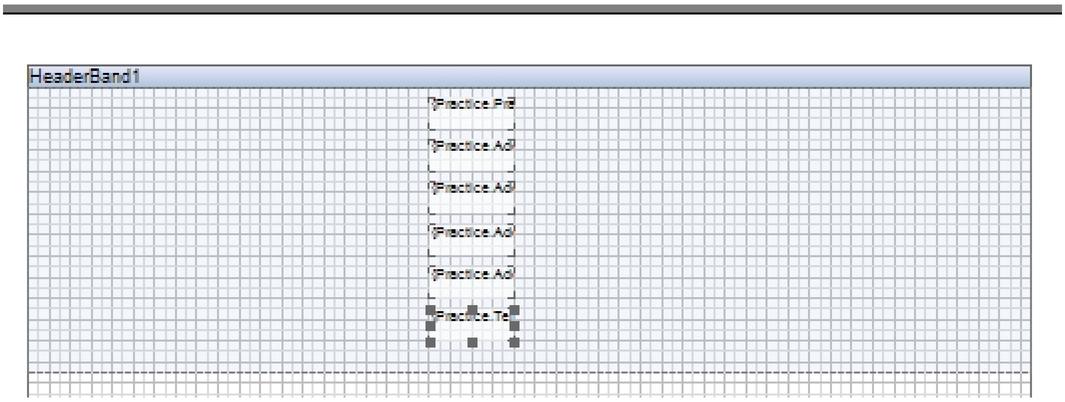
The Header Band should now be large enough to hold the Practice Name, Address and telephone number.

4. Next, from the dictionary on the right pane, expand the Practice data source. You should see a list of available fields which can be used as place holders for your practice details.



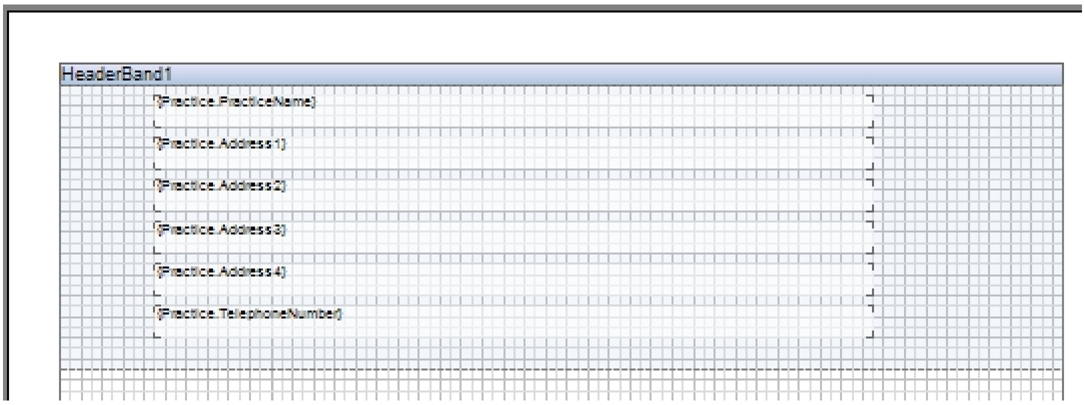
5. To place this information on your template all you need to do is select the field you want by left clicking on it, holding the button down and dragging the field into the Header Band. Drag the ‘PracticeName’, ‘Address1’, ‘Address2’, ‘Address3’, ‘Address4’ and ‘TelephoneNumber’ into the Header Band.

The form should look like this:

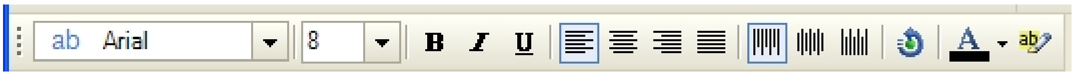


You can resize these fields by selecting each one and dragging on their anchor boxes. You can select multiple fields by holding the control key down and clicking on each field. Once all fields are selected you can perform the resize on all fields together.

The form will now look like this:

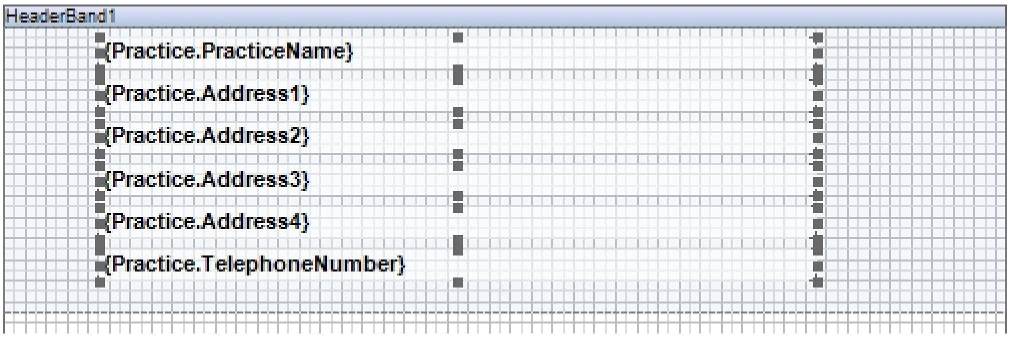


With all fields still selected you can modify the font size and font properties using the Format toolbar towards the top of the window.



You can resize the selected fields to be size 12 and make them bold

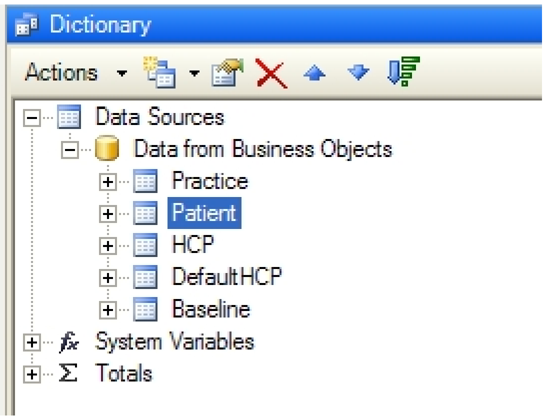
The form will now look like this:



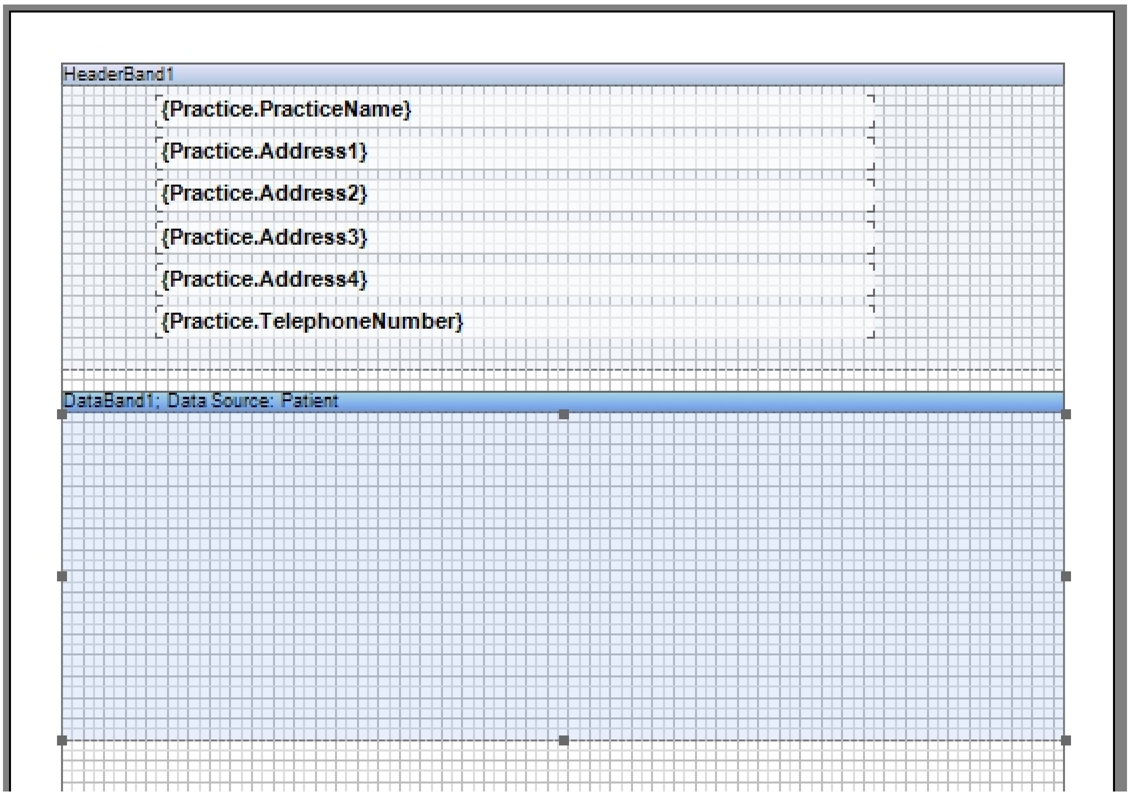
Note: A Header Band will not print on a page unless it is accompanied by a Data Band.

A Data Band is a Band you can place on your template page that gets printed for every row within the Data Source. The Data Band must have one or more rows of data for the Header Band to print.

You can select the Patient Band from the Dictionary in the Right Pane.



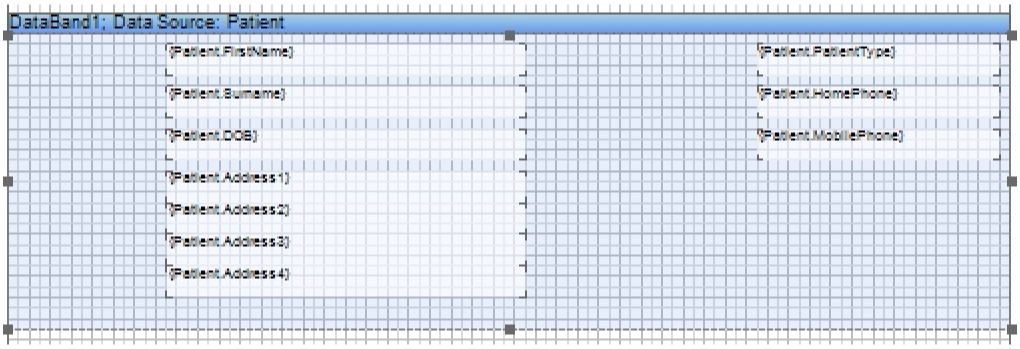
With the Patient Data Band selected, left click and drag it onto the template page below the Header Band. Resize the Data Band once you have placed it onto the page so that there is enough space available to place some of the patient details onto it.



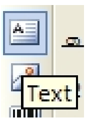
Just like placing practice information on the Header Band, you can do the same with the Patient Data Band.

6. This time select some of the patient details you want to print and drag them onto the patient data band. Drag on First Name, Surname, DOB, Address fields, Patient Type and contact numbers.

Resize the fields on the band so they have enough space to print the data they hold.

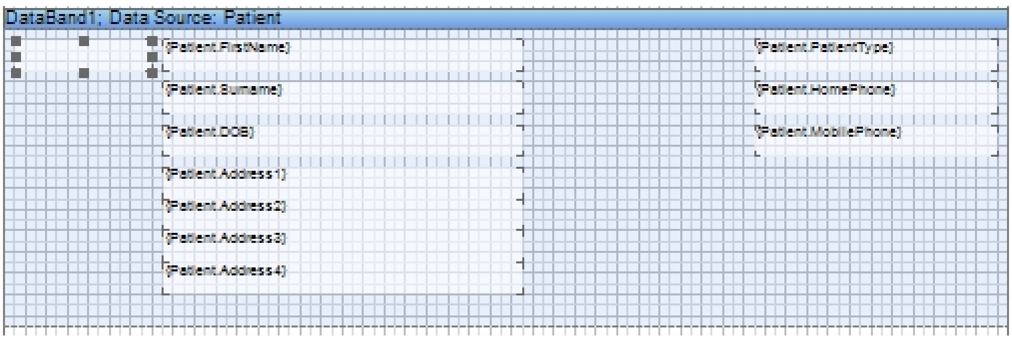


Now that the Data Band is below the Header Band and you have placed the Patient Details onto the Data Band this template should be sufficient enough so that it will print. However, with the image above we have only put place holders onto the Data Band to print the data from Socrates. You might want to label each field with some static text of what each field holds. To do this you need to add a text component from the tool strip on the left to the data band. The text component highlighted in the blue box below shows you which one to drag onto the Data Band.



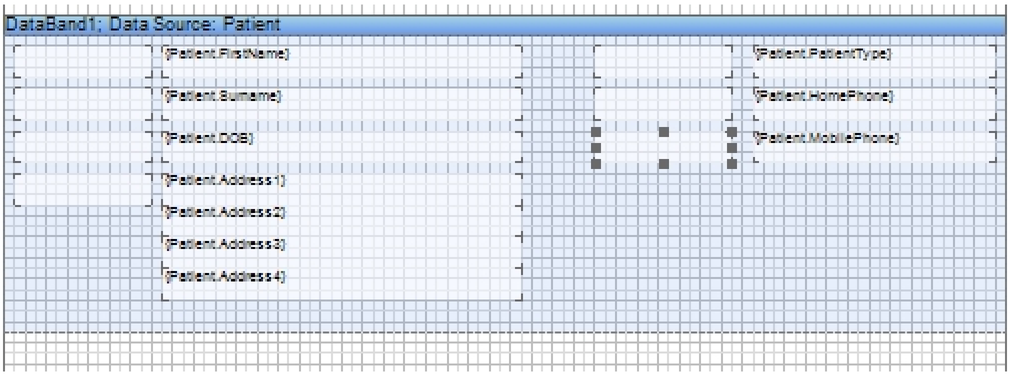
- Text Component that allows you to write text anywhere on the page.

Drag it onto the Data band and place it next to the patients' first name. Resize it so that it is wide enough to hold the descriptions of each field

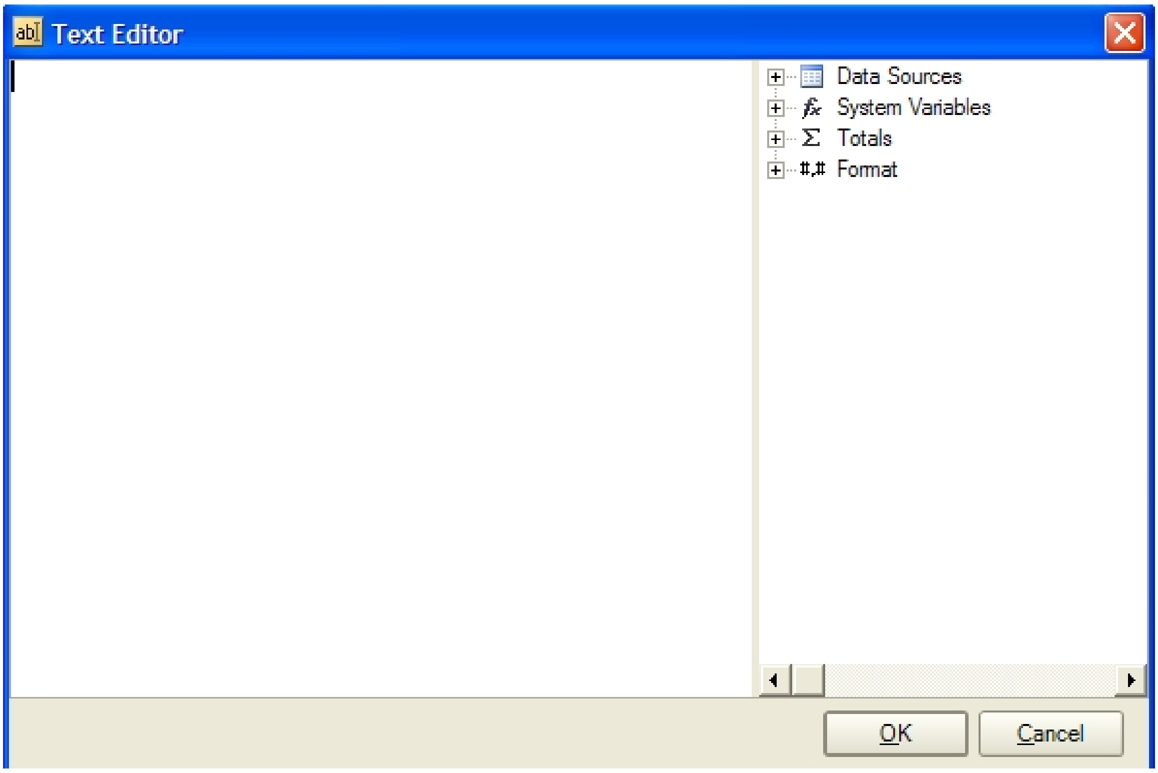


You should now see the empty text component to the left of the patients' first name. You should place one of these beside each piece of information that is going to be printed so that the data is clearly labelled. You can quickly make a copy of the text component by holding the Control key down, left clicking on the empty text component and dragging. Release the left mouse button to make a quick copy of the component. Repeat this for each field.

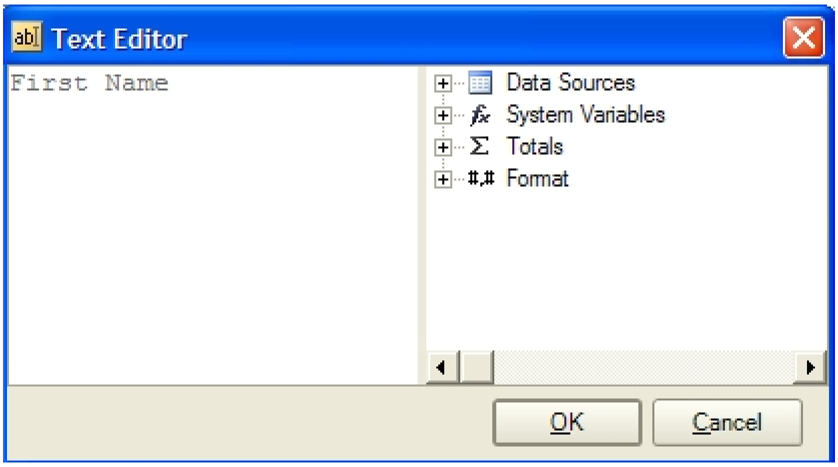
Once you are done setting up labels for each field you should have something like this:



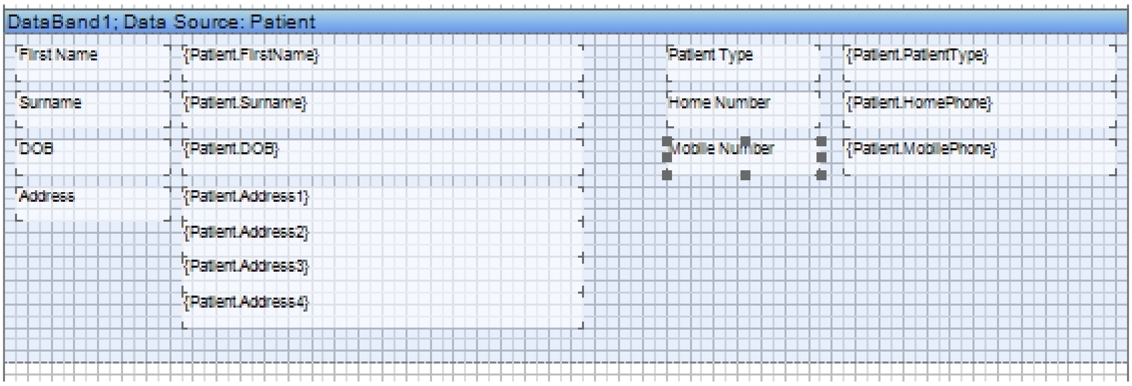
Right now each text component is empty meaning it has no label. To set the text for each label, double click on it and the following window should appear



This is the Text Editor window and it allows you to type in free text, place in fields from data source or even combine both. For now just type in free text to describe each field as follows:



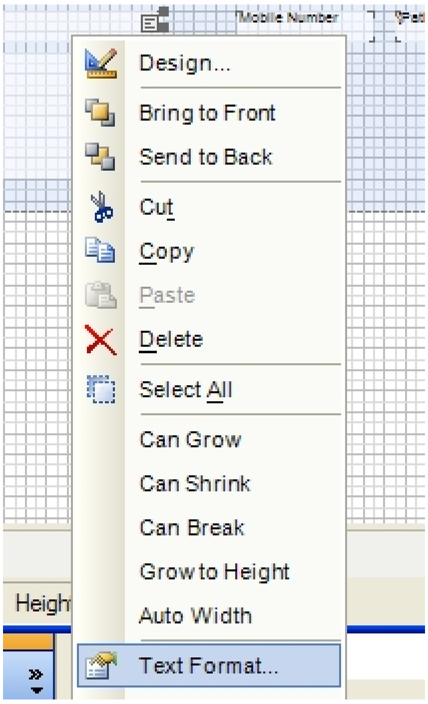
Click OK or press Control + Enter to save the text you entered. Repeat this step for each empty text component you have on the Data Band until you are left with the following:

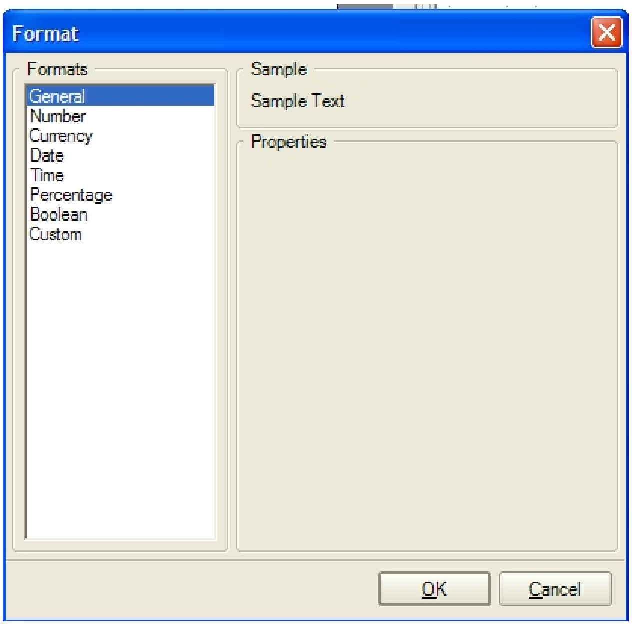


You can also apply specific formatting to different types of fields on the Data Band. For example, the patients DOB field will print the date and time of a patients DOB by default however the time is irrelevant when showing the DOB so you can change its format to just display date.

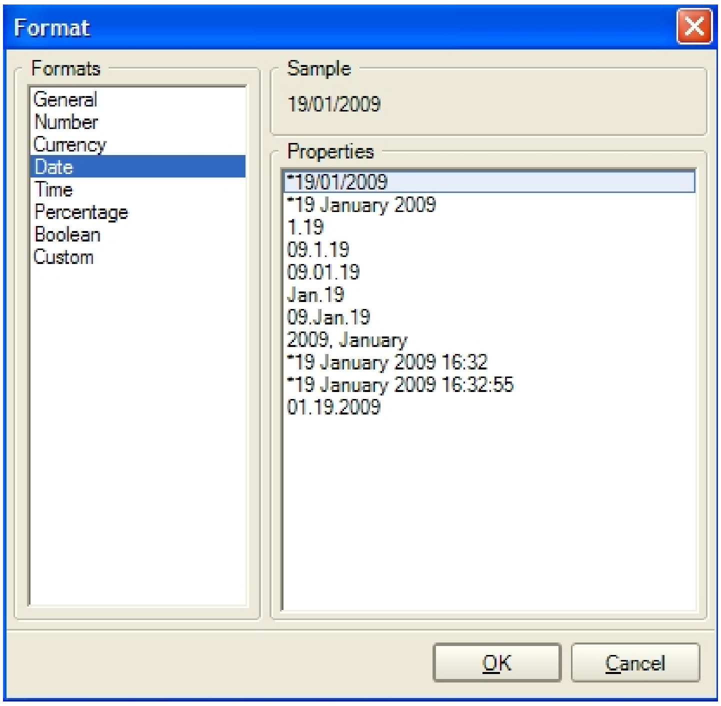
To do this, first select the patients DOB field from the Data Band

You can right click on the selected field which will bring up a menu with various options available. You can select the Text Format options to bring up the formatting window.



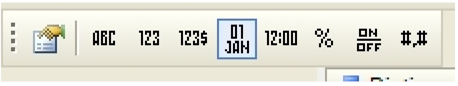


From this window you can select from the available formats on the left pane and choose date. You can then choose the type of Date formatting you wish, e.g., Long date format or short date format



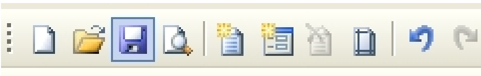
Click OK to apply the selected Text Format.

There is also a quick access toolbar to these available text formats from the toolbars at the top of the window. The toolbar you are looking for looks like this:



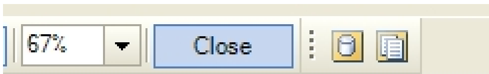
Each of the buttons on the toolbar applies to each of the text formats available.

With the template layout now complete, you should save the changes you have made. Click on the Save button to save the current work you have done. The save button is available from the toolbar at the top of the window:

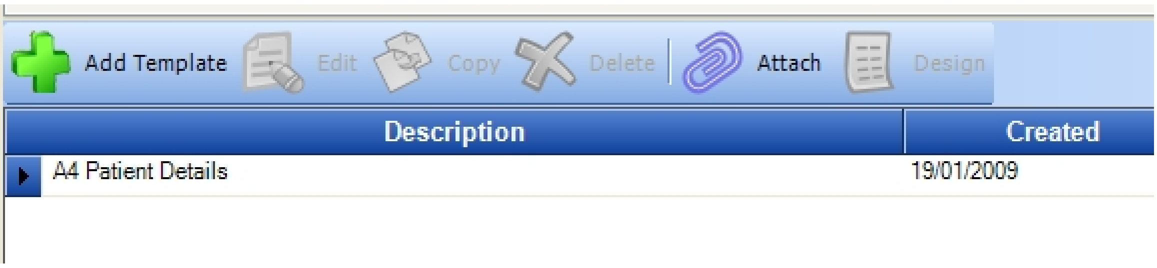


NOTE: Be sure to save your work frequently.

Now that the template is saved, close the template designer studio by clicking on the X in the top right corner of the window or by pressing the close button.



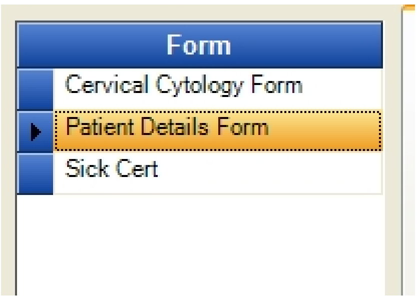
You should now be returned to Socrates where you can see the template you created is listed for the custom form



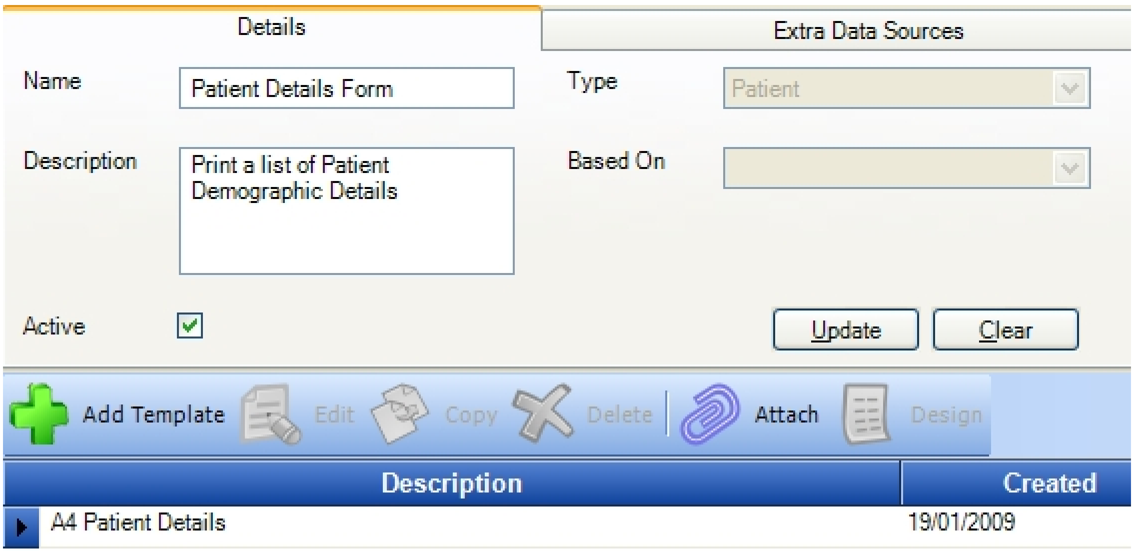
This custom form along with the attached template is now available from a patients chart within consultation.

Edit Custom Form Template

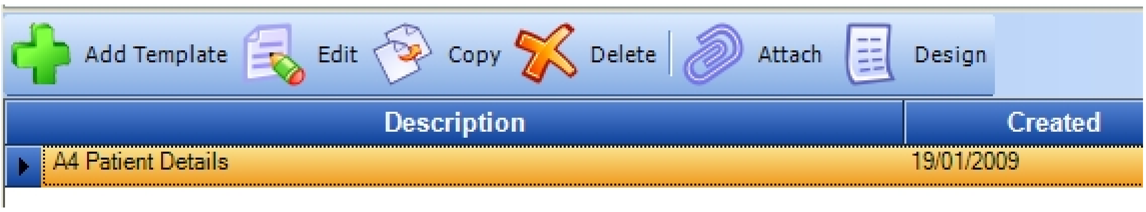
To edit a template attached to a custom form you first need to load the details for the custom form by selecting it from the left pane



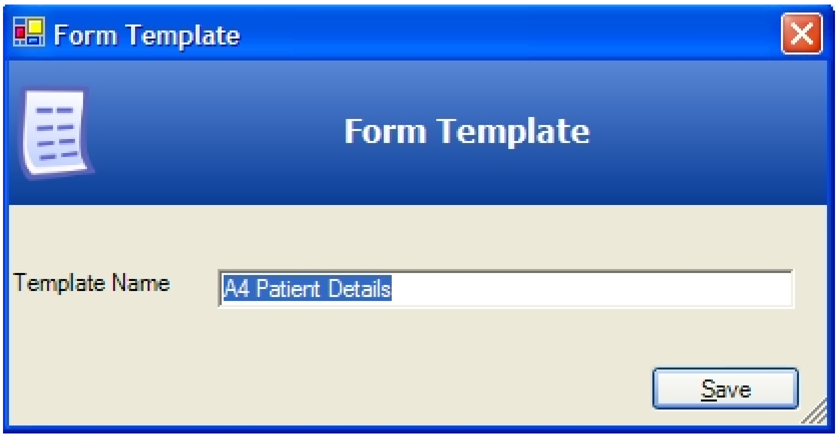
Its details along with any active templates attached to it will be displayed on the right side of the window.



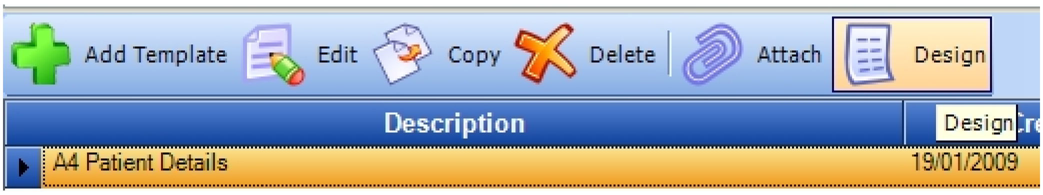
To edit a template select it from the list towards the bottom of the window.



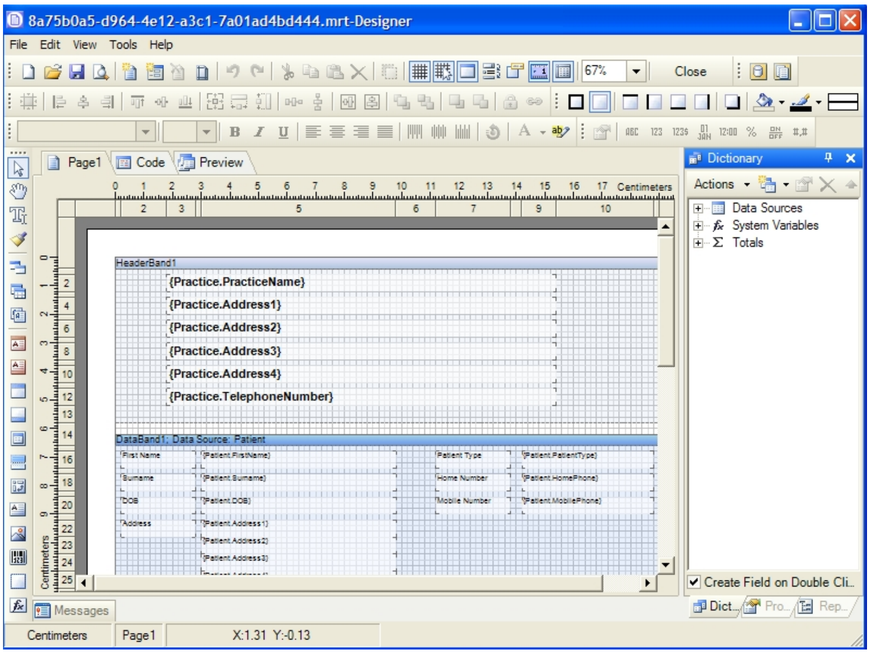
If you need to change the name of the attached template press the Edit button. This will allow you to rename the template.



If you need to modify the template layout, for example changing its format, adding new data or removing data then you should click on the design button



This will open the Template Studio Designer loading the existing template layout for the template you wish to edit



You can now edit your template within the design studio to make any changes you require. When you've applied the changes you require, click the Save button to save your changes

And close the template