

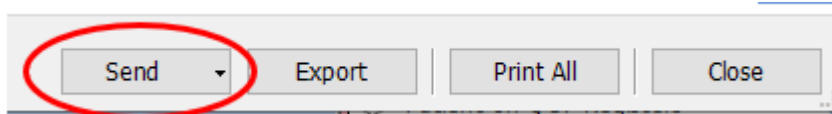
## Sending documents via email from within EMIS Web

**Some GP practice users who have been upgraded to Office 365 are experiencing an issue when trying to email documents from within a patient's record in EMIS Web. Some users are finding EMIS Web either:**

- 1) Crashes and closes without displaying any error
- 2) Crashes and displays a KD error

Testing by SCW and EMIS has highlighted this issue is intermittent and may not affect all users. For example, the process may work the first time a document is selected to be emailed, but not on subsequent occasions.

This operation is performed using the 'Send' button which appears at the bottom of the document viewer in the 'Documents' section of a patient's record.



Once the 'Send' button is pressed, the option to send 'via Email' appears. It is at this point when the 'via Email' option is clicked that EMIS Web may crash.



EMIS are still working on identifying the root cause of this issue, but in the interim SCW have identified some workarounds that users can use to email documents from within the patient's record if they are experiencing the issue described above.

**The following table will help users to identify which method would be best for them to use:**

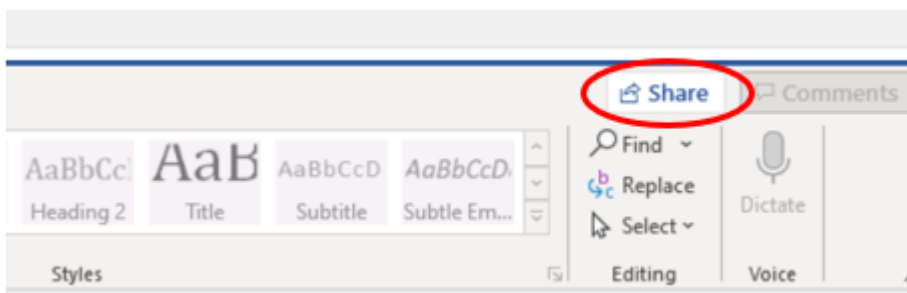
Method Options	Pros	Cons
<b>Method 1</b> Use the 'Share' button in Microsoft Word <a href="#">(See page 3)</a>	<ul style="list-style-type: none"> <li>+ Quickest, simplest option</li> <li>+ Allows you to easily send documents via email as Word or PDF</li> <li>+ Avoids having to save the document locally</li> </ul>	<ul style="list-style-type: none"> <li>- Only works for documents that can be opened in Microsoft Office (e.g. .doc or .rtf files).</li> <li>- In other cases, Method 2 can be used</li> </ul>
<b>Method 2</b> Save document as PDF and manually email <a href="#">(See page 5)</a>	<ul style="list-style-type: none"> <li>+ Works for all document types</li> </ul>	<ul style="list-style-type: none"> <li>- Requires additional clicks</li> <li>- Requires saving locally</li> <li>- Does not preserve original file format</li> </ul>
<b>Method 3</b> Export document and manually email <a href="#">(See page 7)</a>	<ul style="list-style-type: none"> <li>+ Works for all document types</li> <li>+ Preserves original file format</li> </ul>	<ul style="list-style-type: none"> <li>- Requires additional clicks</li> <li>- Requires saving locally</li> <li>- The document is exported in the format it is saved in. This is fine for scanned images such as TIFFs (.tif), but certain file formats such as Docman (.xxx) and Kettering (.xml) will not be able to be opened or viewed by the recipient unless they have the appropriate program or viewer. In this case it is advisable to use PDFs (Method 2)</li> </ul>

## Method 1 – Using the ‘Share’ button in Microsoft Word

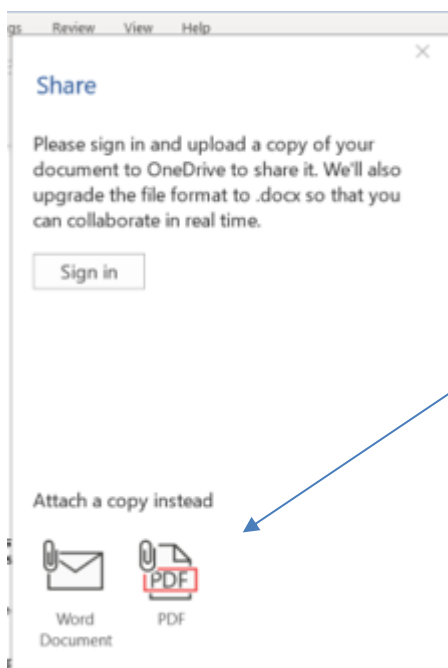
This method avoids users having to save the documents to their PC or a network location and manually adding them to an email, however this only works with Microsoft Office documents (such as typed patient letters) and a limited number of other file formats, such as .rtf.

The process is as follows:

- 1) First access the document in the patient record by:
  - a. Logging into EMIS Web
  - b. Searching for the patient
  - c. Going into the patient’s ‘Documents’ tab
  - d. Selecting the appropriate document/letter.
  - e. Once you have opened the document by double-clicking it, you then need to locate the ‘**Share**’ button in the top right of the screen, which should appear regardless of which tab you are viewing (see screenshot below):



- 2) Click the ‘**Share**’ button and the following will appear:



- 3) Under the section ‘**Attach a copy instead**’ select ‘**Word Document**’ or ‘**PDF**’\* depending on what format you want to send the document in, and it will then automatically open in Outlook with the document added as an attachment.

\* PDF copies of documents are useful when you want to send a ‘read-only copy’.

4) Finally amend the email 'Subject', add the recipient(s) and 'Send' the email.

The screenshot shows the 'Message' ribbon in Microsoft Word, which is used for composing emails. The ribbon includes several groups of commands:

- File:** Unprotected (lock icon), Message Restrictions (key icon), Attach Large Files (paperclip icon).
- Options:** Paste (clipboard icon), Clipboard (list icon).
- Format Text:** Font face and size (11), Bold (B), Italic (I), Underline (U), Text color (A), Background color (shading), Bullets (bullet icon), Paragraph (list icon), Indent (list icon), Link (link icon), Signature (signature icon).
- Names:** Address Book (person icon), Check Names (two people icon).
- Include:** Attach File (paperclip icon), Link (link icon), Assign Policy (envelope icon), Follow Up (flag icon), High Importance (exclamation mark icon), Low Importance (down arrow icon), Tags (list icon).
- Voice:** Dictate (microphone icon).

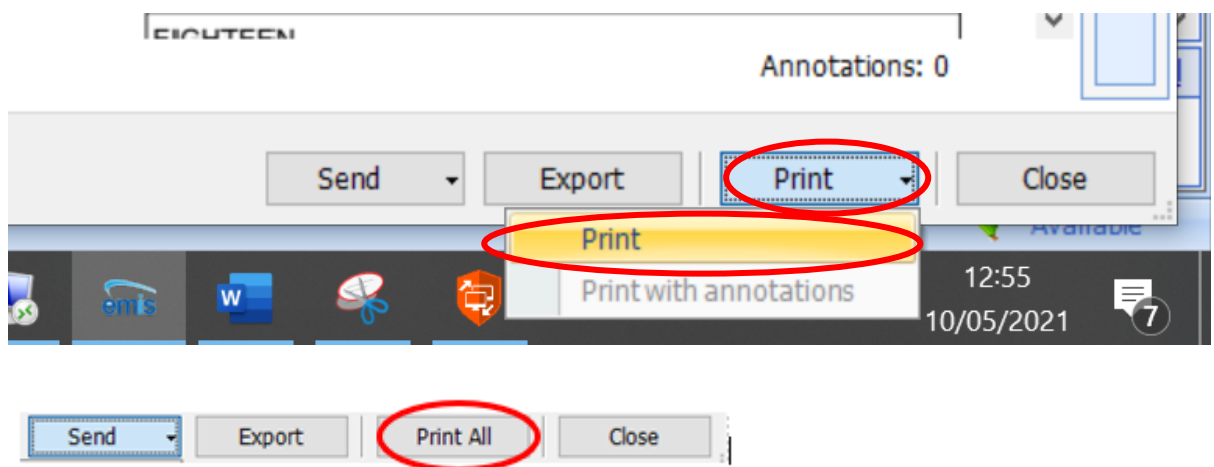
Below the ribbon, the email composition fields are visible:

- To:** A text box for the primary recipient.
- Cc:** A text box for carbon copy recipients.
- Subject:** A text box containing the subject line, currently showing the placeholder text 'f518b6eae45e4bb5b18ec1f5503f3286'.
- Attachments:** A section showing a single attachment: 'f518b6eae45e4bb5b18ec1f5503f3286.pdf' with a size of '99 KB'.

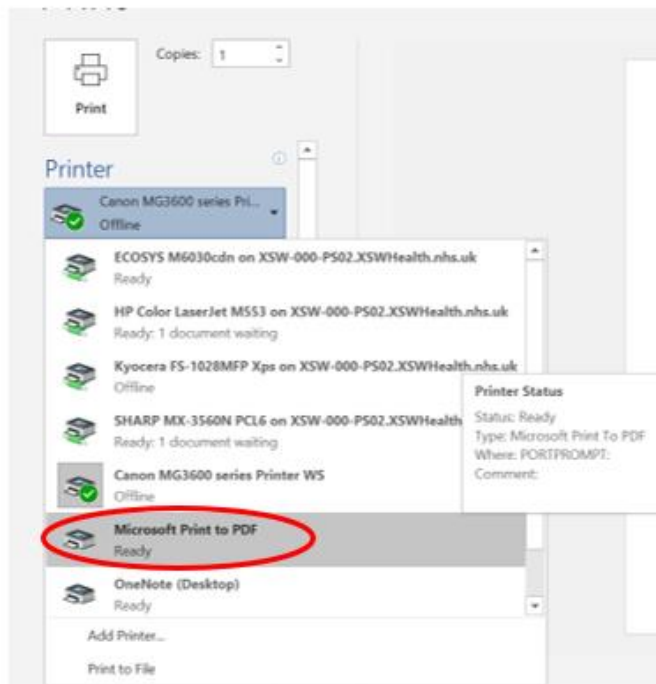
A 'Send' button is located to the left of the 'To' and 'Cc' fields.

## Method 2 – Save document as PDF and manually email

- 1) First access the document in the patient record by:
  - a. Logging into EMIS Web
  - b. Searching for the patient
  - c. Going into the patient's 'Documents' tab
  - d. Selecting the appropriate document/letter.
- 2) Instead of clicking 'Send' at the bottom of the page, click on '**Print**' and then '**Print**' again (on some documents, it will just say '**Print All**' as in the second screenshot below).



- 3) On the next page that appears, select the '**Change printer settings**' option
- 4) On the Printer list find the '**Microsoft Print to PDF**' option and click '**Print**'.



- 5) This will prompt you to pick a location to save the document. Pick somewhere appropriate, like a secure folder on the Practice Y: drive (you could create a specific folder for this purpose in an agreed location).
- 6) Finally go to Outlook, draft the email you need to send, attach the relevant saved document, and send the email. Once sent, this document should be deleted from the saved location.

### Method 3 – Export document and manually email

- 1) First access the document in the patient record by:
  - a. Logging into EMIS Web
  - b. Searching for the patient
  - c. Going into the patient's 'Documents' tab
  - d. Selecting the appropriate document/letter.
- 2) Instead of clicking 'Send' at the bottom of the page, click on **'Export'**



- 3) This will prompt you to pick a location to save the document. Pick somewhere appropriate, like a secure folder on the Practice Y: drive (you could create a specific folder for this purpose in an agreed location).
- 4) Finally go to Outlook, draft the email you need to send, attach the relevant saved document, and send the email. Once sent, this document should be deleted.
- 5) The downside to this method is the document will be exported in the format it is saved in, which is fine for scanned images such as TIFFs (.tif), but certain file formats such as Docman (.xxx) and Kettering (.xml) will not be able to be opened or viewed by the recipient unless they have the appropriate program or viewer. In some cases it may be preferable/suitable to send the documents in their native format.