

South West Digital Coalition

Requisition and Referral Form Design Recommendations

A good referral or requisition form can make transferring information more complete, thorough and legible. It needs to work for both the sender and the recipient. As you are creating a new form or modifying an existing one, consider the following questions and recommendations developed by the Digital Coalition, a group digital health champions advocating on behalf of primary care in the South West

- *Is a form really necessary? Will a letter suffice? Is this form mandatory or optional?*
- *Is all of the information on the form TRULY necessary in advance to be able to triage and book the test or visit? Or can some of it be obtained from the patient directly when they arrive?*

✓	Item	Recommendation
	General Layout	Ideally, all items should fit onto an 8.5 x 11" (letter) document, oriented to portrait. While a 1" margin is not necessary, test-print the form to ensure all items are being captured within the border of the page
	Font	Use 12 point font minimum for readability after it is faxed; recognizing that font size will vary in some areas such as the title, remain as consistent as possible
	Date	Use date format: YYYY/MM/DD and choose a consistent location if designing multiple forms; indicate the date of latest revision if a form is being modified
	Mandatory Information	Identify which fields are considered mandatory (ie. "This form will be sent back if these fields are incomplete")
	Lists of Patient Information	Many patients will have complex histories or long medication lists which may not fit in small boxes. It is preferred to be able to attach relevant medical profile information from the patient chart than to try to fit this information in a text box
	Internal Information	Recognizing that referral/requisition forms require administrative management, consider confining the number of fields that are not relevant to the external user ("Admin Use Only" information) and/or the space where these fields reside
	Text Areas	Do not add lines to text boxes where a paragraph of text is to be written; Consider the amount of space provided for the amount of information being requested
	Checkboxes	Ensure items such checkboxes are adequately space and that they clearly correspond to the intended item; do not request that the user circle an option
	Signature Area	If a signature is required, allow vertical space roughly equivalent to triple the font size. Ensure the appropriate practitioner title is requested (ie. Provider, Physician)
	Mutually exclusive elements	If the user is required to select one item from a list of options, correspond with the builder(s) of the EMR compatible version of the form to ensure the items are built to be mutually exclusive or combined into a drop-down list
	Diagrams	Maximize the size of images or diagrams without compromising other elements in order for drawing functionality to be most effective within the EMR
	File Types	Save a PDF copy of the completed form. If possible, export the PDF copy of the completed form to a PNG image and set the resolution to 150 pixels/inch (click "Settings" before saving). Send the PDF and if available, PNG file to the builder(s)
	Image Quality	When converting the completed form to PDF from a program such as Word (.docx), ensure the general layout and items are not distorted or misaligned