


Quick reference guide: Referrers

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1. Referring a patient

If you are referring using the NHS e-Referral Service web-based system, firstly, find the patient in the Patient Tab, using one of the three search methods: NHS number, Unique Booking Reference Number (UBRN) or Demographics.



Once you have done this you can refer the patient

- ◆ Select [Refer/Advice](#)

If you are referring using an integrated GP clinical system (e.g. SystemOne, EMIS), start the referral process according to the system's guidance.


For both methods, you will then reach the Service Search Criteria screen and continue with the referral creation process in the following way:

- ◆ If you are logged in as a Referring Clinician Admin you will need to select the **Initial Referring Clinician**
- ◆ Click on the **Request Type** drop-down and select the **Referral** option
- ◆ Click on the **Priority Type** drop-down and select an appropriate priority

In the Service Search Criteria screen, complete at least one of the mandatory fields (marked with a *). Each field in this screen can be filtered to aid quick selection of the correct services.

There are three ways to search for services:

1.1. Searching for services using clinical terms

- ◆ Enter the SNOMED CT clinical term that you wish to search for in the **Clinical Term** field
- ◆ Click on the  (or press **Return**) and the **Clinical Terms Search** screen will appear

- ◆ The term you are looking for is populated in the Find field
- ◆ A list matching your initial clinical term will be displayed
- ◆ Click on the appropriate term to select it
- ◆ The **Preferred Term** field is now populated
- ◆ Select your preferred term which will then appear in the **Selected Term** field
- ◆ Once you are satisfied with your preferred term, select **Done**
- ◆ If you are not satisfied with any of the terms shown, click on **Clear** and start your search again
- ◆ When you return to the 'Service Search Criteria' screen, the clinical term field will have the SNOMED CT term that you have selected
- ◆ Select either **Search Primary Care** (for locally commissioned services only) or **Search All** (for locally commissioned and national, consultant-led services)

1.2. Searching for services using specialty and clinic type

Specialty Dermatology	Clinic Type Eczema and Dermatitis
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- ◆ Open the drop-down list by clicking the **Specialty** box and selecting the appropriate specialty
- ◆ Select the correct clinic type using the **Clinic Type** drop-down
- ◆ Select either **Search Primary Care** (for locally commissioned services only) or **Search All** (for locally commissioned and national, consultant-led services)


1.3. Searching for services using named clinician

- ◆ Enter the surname of the clinician in the **Named Clinician** field on the **Service Search** screen
- ◆ Click on the  (or press **Return**) and the **Named Clinician Search** screen will appear

Named Clinician Search

*Surname

Forename

Organisation or Site Name 

Specialty

A clinician must be selected before continuing

Name ↑	Job Role - Location
Smith, Anthony	View Multiple
Smith, Belinda	View Multiple
Smith, Benjamin	Consultant - MAIDSTONE AND TUNBRIDGE WELLS NHS TRUST
Smith, Caroline	Admin/Clinical Support Access Role - BMI HEALTHCARE
Smith, Celia	Clinical Practitioner Access Role - GREAT WESTERN HOSPITALS NHS FOUNDATION TRUST
Smith, Erica	Consultant - THE NEWCASTLE UPON TYNE HOSPITALS NHS FOUNDATION TRUST
Smith, Francesca	View Multiple
Smith, Joanne	View Multiple
Smith, Jonathan	View Multiple
Smith, Keith	Clinical Practitioner Access Role - EAST CHESHIRE NHS TRUST
Smith, Martin	View Multiple
Smith, Martyn	Clinical Practitioner Access Role - SOUTHEND UNIVERSITY HOSPITAL NHS FOUNDATION TRUST
Smith, Nicholas	View Multiple
Smith, Simon James	View Multiple
Smith, Simon Nicholas	View Multiple
Smith, Theresa	Consultant - COUNTESS OF CHESTER HOSPITAL NHS FOUNDATION TRUST

- ◆ Select the appropriate clinician (or use the other search fields first, to refine your search) and then choose **Done**
- ◆ When you return to the Service Search Criteria screen the **Named Clinician** field will have the clinician you selected
- ◆ Select either **Search Primary Care** (for locally commissioned services only) or **Search All** (for locally commissioned and national, consultant-led services)

1.4. Service selection

- ◆ Click in each checkbox beside the service(s) chosen

Then you can either select:

- ◆ **Appointment Search** to book an appointment for the patient OR
- ◆ **Request**, which lets you complete the referral, allowing the patient or their representative to book an appointment at a later stage

Select	Miles	Service Name
<input type="checkbox"/>	40	DBS (Slot Reservation
<input type="checkbox"/>	40	DBS Test 1 Knee Serv
<input type="checkbox"/>	40	E-Learning Knee Serv

<input type="button" value="Appointment Search"/>	<input type="button" value="Request"/>
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Selecting either of these options will display a pop-up window with further details on the service(s) selected.

Review Referral Criteria					
Select	Service Name	Referrer Alert	Exclusions	Conditions Treated	Suggested Investigation
<input checked="" type="checkbox"/>	Adult NHS Hernia Clinic - Castleton Hospital	Please ensure you enclose an ultrasound scan with the referral letter	Haemorrhoids, PR Bleeding, Colorectal, Plastic Surgery, Hand/Foot, Sebaceous cyst.	Inguinal Hernia, Umbilical Hernia, Bilateral Hernia, Epigastric Hernia, Incisional Hernia, Cholecystitis, Gallstones.	Phlebotomy
<input checked="" type="checkbox"/>	Adult general surgery - Southbridge Hospital		Lipomas less than 4cm In growing toe nails Carpal tunnel syndrome Finger lesions Hand lesions Isolated pigmented lesions Breasts Podiatry Peripheral vascular disorder- Please see Vascular Service Arteries Ischaemic feet Intermittent claudication Swallowing problems Stomach disorders Reflux - Please see Upper GI Service Colorectal problems - Please see Colorectal Service	Hernias Gallstones Big lipomas Recurrent hernia Surgical inflammatory bowel disease Diverticular disease	
<input checked="" type="checkbox"/>	General surgery - Loftwood Hospital		Patient >25 BMI RECURRENT HERNIA BILATERAL HERNIA (CAN BE DONE ONE AT A TIME) ALLEGY TO XYLOCAINE and or BUPIVACAINE BUBONOCLE CONGENITAL ONIHALCOELE GASTROSCISSIS HERNIA OF ABDOMINAL CAVITY HERNIA OF ABDOMINAL WALL INCISIONAL HERNIA INCISIONAL HERNIA OF ANTERIOR ABDOMINAL WALL Read More	Epigastric Hernia Femoral Hernia Hernia of anterior abdominal wall Inguinal Hernia Paraumbilical Hernia Spigelian Hernia Umbilical Hernia	MPSA SCREENING TO BE DONE FIRST PLEASE
<input checked="" type="checkbox"/>	General surgery - Highfield Infirmary		Patients under the age of 16 should not be referred to this service. Any conditions not relating to Hernia. Do NOT refer patients with lumps and bumps to this service. Please refer to the Adult Lumps and Bumps Services. Patients with suspected cancer should be referred according to the cancer network guidelines via the 2ww office.	Abdominal hernia; epigastric hernia; femoral hernia; groin hernia; hernia paraumbilical; hernias; incisional hernia; inguinal hernia; irreducible hernia; left inguinal hernia; lumbar hernia; paraumbilical hernia para-umbilical hernias; para-umbilical swelling; right inguinal hernia; scrotal hernia; spigelian hernia; Sportsman's hernia; strangulated hernia; umbilical hernia; umbilical swelling	

From here, you can check that your patient meets the referral criteria and then choose to:

- ◆ Deselect inappropriate services
- ◆ Return to the previous screen to change the service selection OR
- ◆ Continue with the selected services

If you choose to book an appointment using the **Appointment Search** function the next screen will display appointment dates:

Appointment Search									
Referral Information									
Initial Referring Clinician: SMITH, Emma			Commissioning Organisation: NHS CAMDEN CCG			Initial Referring Organisation: ABBEY MEDICAL CENTRE			
Selected Service(s) Filter									
Compare Services									
Select	Miles	Appointment Type	Service Name	Indicative Appointment Wait Ⓢ	Indicative Treatment Wait Ⓢ	Directly Bookable	Referrer Alert	Link to NHS Choices	Location
<input checked="" type="checkbox"/>	188	First outpatient	Directly Bookable Service 1	Limited Availability		Yes	ⓘ	ⓘ	Location 1
<input checked="" type="checkbox"/>	188	Assessment Service	Directly Bookable Service 2	2 Days		Yes	ⓘ	ⓘ	Location 2
<input checked="" type="checkbox"/>	188	Assessment Service	Directly Bookable Service 3	2 Days		Yes	ⓘ	ⓘ	Location 3
<input checked="" type="checkbox"/>	188	Assessment Service	Directly Bookable Service 4	Limited Availability		Yes	ⓘ	ⓘ	Location 4
Appointment Slot Filter									
Priority: Routine		Named Clinician: -			<input type="button" value="Update Appointments List"/>				
Available Appointments									
Select one of the following slots for the directly bookable services that you have selected									
Deselect Appointment									
Select	Appointment Date/Time	Service Name	Location						
<input type="radio"/>	09:00 Thu 07-Jun-2018	Directly Bookable Service 1	Location 1						
<input checked="" type="radio"/>	09:00 Thu 07-Jun-2018	Directly Bookable Service 3	Location 3						
<input type="radio"/>	09:30 Thu 07-Jun-2018	Directly Bookable Service 2	Location 2						
<input type="radio"/>	09:30 Thu 07-Jun-2018	Directly Bookable Service 1	Location 1						
<input type="radio"/>	10:00 Thu 07-Jun-2018	Directly Bookable Service 2	Location 2						
<input type="radio"/>	10:00 Thu 07-Jun-2018	Directly Bookable Service 1	Location 1						
			<input type="button" value="Previous Appointments"/> <input type="button" value="Next Appointments"/>						
<input type="button" value="Cancel"/> <input type="button" value="Service Selection"/> <input type="button" value="Defers to Provider"/> <input type="button" value="Request"/> <input type="button" value="Book"/>									

- ◆ Select an appropriate day and time
- ◆ Select **Book** to continue with the referral

Note that when you either book an appointment or select the **Request** option, you will be prompted by the **Check Patient Details** pop-up box to confirm that the patient's contact details are correct.

Check Patient Details

Please ensure that the patient's details are correct. If they are not up to date, this may result in a delay to care. The patient needs to be aware that setting the Consent to Call Back to 'No' will prevent them from being contacted by telephone. If the patient's details are correct, click 'OK' to continue. If not, click 'Update Person'.

Patient Name SMITH, John (Mr)

Address 1 The Street
Town name
Postcode

Consent to Call Back Yes

Telephone Mobile : 07890 123 456

Update Person
OK

- ◆ To change the patient's details, click on the **Update Person** button
- ◆ If the details are correct, click OK

1.5. Completing the referral

Check these details before you submit

UBRN: 0003 0946 7813

Speciality: Ear, Nose & Throat

Clinic Type: Throat (incl Voice / Swallowing)

Clinical Term: ...

Services:

Location	Referral Alert	Service Name	Organisation Type	Indicative Wait Time
DEVON REFERRAL SUPPORT SERVICES (WINDSOR HOUSE-PLYMOUTH)	!	Directly Bookable Service (with NO slots) NEW DEVON (Referral Letter Required)	Primary Care Trust PCT	Limited Availability
DEVON REFERRAL SUPPORT SERVICES (WINDSOR HOUSE-PLYMOUTH)		Directly Bookable Service (with slots) & Advice Service NEW DEVON (Referral Letter Required)	Primary Care Trust PCT	2 Days
DEVON REFERRAL SUPPORT SERVICES (WINDSOR HOUSE-PLYMOUTH)		Directly Bookable Service (with slots) NEW DEVON (NO Referral Letter Required)	Primary Care Trust PCT	2 Days

Priority: Routine

Referral Letter Outstanding, will add at a later time

The system will send a reminder letter if appointment is not booked

The reminder letter will be sent after Day(s)

Submit

[< Back](#)

After reviewing the patient's details, you are presented with the **Appointment Request Details** screen. **Note that at this stage, the referral is not complete.** This is an opportunity for you to check that all of the referral information is correct.

- ◆ If the information is correct press **Submit**
- ◆ If any of the information is incorrect, you can make changes using the **Don't Submit** button

Appointment Summary - 0003 0946 7526

Appointment Details

The patient's Consent to Call Back is defined as Yes. If the patient wants to change the Consent to Call Back, enter the change in Update Person.

UBRN Created Date	Thu 07-Jun-2018 10:19
UBRN	0003 0946 7526
Appointment Date/Time	Fri 08-Jun-2018 09:30
Duration	30 minutes
Clinical Term	-
Location	Location 1
Service Name	Service 1
Organisation Type	Primary Care Trust PCT
Speciality	Ear, Nose & Throat
Clinic Type	Ear
Priority	Routine
Content Sensitive	No
Appointment Instructions	Please bring your appointment confirmation letter to your appointment. This is a teaching hospital so there may be student doctors present.

Print | Update Person | Add Additional Requirements | Add Referral Letter | Close

The last screen is the **Appointment Summary** screen. From this screen you can print the request/appointment details for the patient, if applicable you can add additional requirements such as an interpreter or patient transport and you can add a referral letter. **Note that adding an additional requirement merely flags to the provider that you feel these are necessary. It does not book them.**

2. Attaching a referral letter

If the referral is created directly via an integrated GP clinical system, the referral letter/clinical information can be attached via that system. You will need to check the help information/training materials for that system to learn how to do this.

Attaching a referral letter via the web-based e-RS application can be done in several ways:

2.1. Attaching a referral letter as part of the referral process

- ◆ When you have completed the referral request or booking, select the **Add Referral Letter** button in the summary screen

Clinical Referral Information

Referred By

Name	SMITH, Howard (Dr)
Organisation Name	Smith and Partners GP Practice
Organisation Address	Practice Road Town Name Postcode
Organisation Phone	01234 567890
Priority	Routine

Referral Attachments

[Add Attachment](#)

File Name	File Description	Remove
Referral Letter	Click here to add File Description	

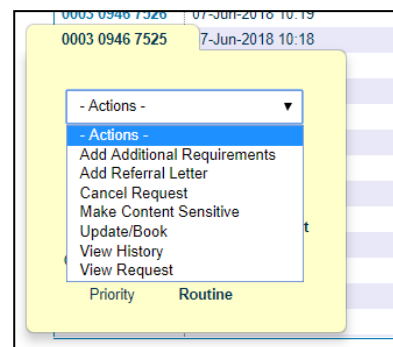
Cancel | Submit

This will take you to the **Clinical Referral Information** screen

- ◆ Select **Add Attachment**
- ◆ A referral letter should have been previously created and saved to a secure location
- ◆ Locate the file and select **Open** to attach the file
- ◆ This step can be repeated to add multiple files to a total maximum limit of 5MB
- ◆ Select **Submit**
- ◆ Select **Close** to complete the action

2.2. Attaching the referral letter as a separate task

- ◆ From the **Patient Activity List** (Patient tab) OR **Outstanding Referral Letter** **worklist**.
- ◆ Select the appropriate UBRN.
- ◆ From the **Actions** list, select the **Add Referral Letter** option
- ◆ A referral letter should have been previously created and saved to a secure location
- ◆ Locate the file and select **Open** to attach the file
- ◆ This step can be repeated to add multiple files to a limit of 5MB
- ◆ Select **Submit**
- ◆ Select **Close** to complete the action



2.3. Suitable file types

Suitable file types for referral attachments are:

- Plain Text (text/plain) - .txt
- HTML Text (text/html) - .html, .htm
- PDF (application/pdf) - .pdf
- XML Text (text/xml) - .xml
- RTF Text (text/rtf) - .rtf, .rtx
- Basic Audio (audio/basic) - .au
- MPEG audio layer 3 (audio/mpeg) - .mp3
- PNG Image (image/png) - .png
- GIF Image (image/gif) - .gif
- JPEG Image (image/jpeg) - .jpg, .jpe, .jpeg
- TIFF Image (image/tiff) - .tif, .tiff
- MPEG Video (video/mpeg) - .mpg, .mpeg, .mpe
- MSWORD (application/msword) - .doc
- MSWORD (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - .docx

If there are any queries about attachment file type, check the above and ask the Service Provider's IT department to allow it within their organisation.

3. Managing worklists

Each worklist **MUST** be reviewed and actioned appropriately. The actions available for each referral will depend on the referral's history.

Worklist Type	Advice and Guidance ▼	Click 'Load' to load results.
Filter Criteria	Referrer	Show All ▼

Note: When you open the Worklists tab you will see two filters (Filter by Referrer and Filter by Worklist) allowing you to sort the referrals you want to see.

Columns can be sorted by clicking on the heading. When you have done this, a white arrow will appear next to the heading.

UBRN Created ↑
12-Dec-2017
13-Dec-2017
08-Feb-2018
01-Mar-2018
02-Mar-2018

3.1. Referrer Action Required worklist

Referrals on this worklist **MUST** be actioned. They will have one of the following categories in the Referral Status column:

Rejected: After the receiving clinician has assessed the referral information provided by the GP, it is felt that the patient could be managed more effectively either by an alternative, more clinically appropriate service or in primary care. These referrals must be actioned by the referrer. This may include cancelling the referral or identifying new, more suitable service(s).

- ◆ View any comments made by the service provider and act as is clinically appropriate from the options available

Cancelled UBRN: referral requests, along with the patient's appointment have been cancelled.

- ◆ Check the reason why the referral request has been cancelled and remove it from the worklist

Assessment Result: referrals with this status have been sent to a service with Clinical Assessment Service (CAS) functionality.

- ◆ Review and remove

Triage Response: referral sent to a Referral Assessment Service (RAS) has been assessed by a service provider and sent back.

- ◆ Review and action accordingly

DNA (Did Not Attend): if a patient was referred to a directly bookable service and they DNA'd their appointment, the provider sends this back to notify the referrer.

- ◆ View the referral and take the appropriate action, which may include re-submitting the referral request to the same (or a different) service

Referral Status	
DNA	15
Cancelled UBRN	15
Rejected	15
Triage Response	15
Assessment Result	15
Assessment Result	15
Rejected	15
DNA	0

3.2. Awaiting Booking/Acceptance worklist

Referrals on this worklist should be monitored but not necessarily actioned. They will have one of the following categories in the **Referral Status** column:

- **Booked**
- **Cancelled by Patient/Provider**
- **Deferred to Provider**
- **Not Yet Booked**
- **Awaiting Triage**

Note: Referrals will move on and off this worklist depending on the actions carried out on them. These actions may be made by the provider, patient or referrer.

- ◆ Monitor this worklist and decide what/whether/when to action each referral

3.3. Outstanding Referral Letters worklist

Referrals on this worklist require actioning. A referral has been created but no referral letter/clinical information has been attached. Once a referral letter is attached (either via the web-based e-RS system or an integrated GP clinical system), the UBRN will be removed from this worklist.

Service providers will not be able to view and action the referral until a referral letter has been added.

3.4. Advice and Guidance (A&G) worklist

Referrals on this worklist are for A&G requests and responses. You can action them by either replying to the response, ending the conversation or converting the A&G response into a referral.

- ◆ Select the UBRN
- ◆ Review the contents, which may include attachments
- ◆ If you need to continue the conversation you can type your reply and click **Submit**
- ◆ Where no further action is required, print the conversation for the patient's medical records if required and click **End Conversation**
- ◆ Where a referral is required you can click **Refer Now** to convert the UBRN into an Appointment Request

4. The Patient tab

The Patient tab can be used to find a patient's referral, if you have the right smartcard access and the referral has been active in the last 18 months.

The screenshot shows the 'e-Referral Service' interface with the 'Patient' tab selected. The search bar is empty, and the search criteria are set to 'NHS Number'. There are three input boxes for the NHS number, each with a red border. The 'Search' button is visible on the right.

You can search for a patient using either their NHS number, a specific UBRN or their demographic information.

The screenshot shows the 'e-Referral Service' interface with the 'Patient' tab selected. The patient's details are displayed, including Name, NHS Number, Date of Birth, Age, Gender, Telephone, Mobile, and Address. Below the details is a 'Patient Activity List' showing a table of referrals.

UBRN	Requested Date/Time	Appointment	Referred By	Category	Referral Type	Clinical Information Last Updated	Clinical Context
0003 0946 7526	07-Jun-2018 10:19	08-Jun-2018 09:30	SMITH, Anthony (Dr)	Future	Referral	07-Jun-2018 10:58	Ear, Nose & Throat/Ear
0003 0946 7525	07-Jun-2018 10:18	-	SMITH, Anthony (Dr)	Unbooked	Referral	-	Ear, Nose & Throat/Ear
0003 0946 7524	29-May-2018 15:07	-	SMITH, Anthony (Dr)	Request	A & G	-	Ear, Nose & Throat/Facial Plastic and Skin Lesions

A **Patient Activity List** will be displayed with each referral created for the patient, with actions for each one.

In the Patient tab you can also use the **Update Person** button to change patient information.

You are also able to select the **Show all Non-Archived Referrals** tick box to see referrals for the patient that were last actioned over 18 months or more ago.

Further information can be found at digital.nhs.uk/services/nhs-e-referral-service and also within the e-RS system help