Referring a Patient

If you are referring using the web-based system, firstly find the patient in the Patient Tab, using one of the three search methods: NHS number, UBRN or Demographics.

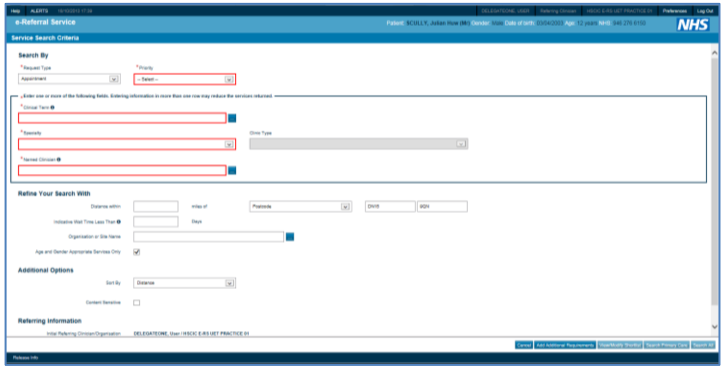
- Select Refer/Advice

If you are referring using an integrated GP clinical system, start the referral process according to the systems processes.

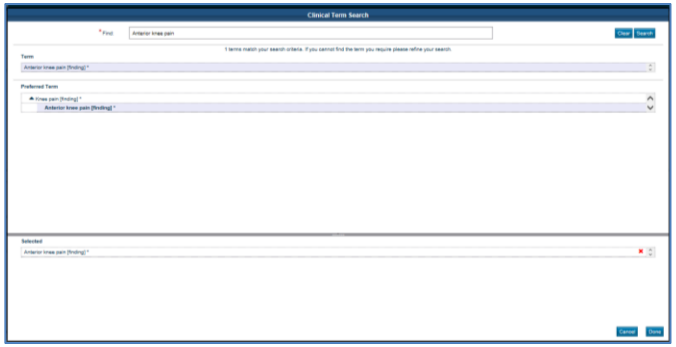
For both methods, you will then open the Service Search screen and carry on the referral creation process in the following way:

- In the **Service Search** screen, complete at least one of the mandatory fields (marked with a *).

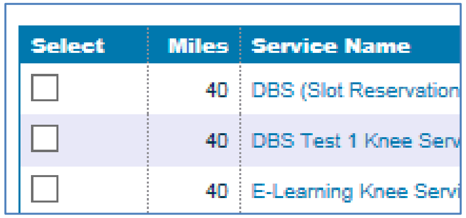
  Note: Each field in this screen will allow you to filter the services you search for.



- Click on the **Request Type** drop-down and select the **Appointment** option.
- Click on the **Priority Type** drop-down and select an appropriate priority.
- Enter the clinical term you wish to search for in the **Clinical Term** field.
- Click on the ... and the **Clinical Terms Search** screen will appear.
- The term you are looking for is populated in the **Find** field.
- Click on the Search button.
- A list matching your initial clinical term will be displayed.
- Click on an appropriate term to select it.
- The **Preferred Term** field is now populated.
- Select your preferred term so that it appears in the **Selected Term** field.
- Once you are happy with your preferred term, select **Done**.



- If you are not happy with any of the terms shown, click on **Clear** and start your search again.
- When you return to the Service Search screen, the Clinical Term field will have the SNOMED term you selected.
- Select either the **Search Primary Care** or **Search All** button.
  Click in each checkbox beside the service(s) chosen by you and the patient.



Select	Miles	Service Name
☐	40	DBS (Slot Reservation
☐	40	DBS Test 1 Knee Serv
☐	40	E-Learning Knee Servi

Here, you can either select:
- **Request** which lets you complete the referral and the booking to be made at a later stage; OR
- **Appointment Search** to book an appointment.

Selecting either of these options will display a pop-up window with further details on the services selected. From here, you can choose to deselect inappropriate services, return to the previous screen to change the service selection and continue with the selected services.
- If you choose to continue, and previously select ed **Appointment Search,** the next screen will display appointment dates.
- Select an appropriate appointment date and time.
- Select **Book** and complete the referral.
  Note: 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 details are correct.
- To change the patient details click on the **Update Person** button or if the details are correct click. OK

Attaching a Referral Letter

Note: If the referral is created directly via a clinical system, the referral letter/clinical information can be attached via that system. You will need to refer to an appropriate manual on how to do this.

Attaching a referral letter via e-Referral Service can be done in several ways:

Whilst creating a referral
- Whilst creating the referral select the **Add Referral Letter** button in the Appointment/Booking Request screen**.**

After creating a referral
- *From the Patient Activity List (Patient tab) OR Outstanding Referral Letter OR Awaiting Booking/ Acceptance worklists.*
- 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 an accessible location.
- Select **Add Attachment**, 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**, and **Submit** again at the next screen.
- Select **Close** to complete the action.

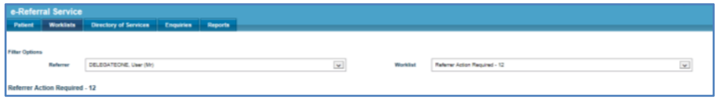
File types that can be attached: Plain Text (.txt), HTML Text, PDF, XML Text, RTF Text (.rtf), Basic Audio, MPEG audio, PNG Image, GIF Image, JPEG Image, TIFF Image, MPEG Video, MSWORD.

Note : If there are any queries about the attachment file type, check the above and ask the Providers IT department to allow it within their organisation.

Managing Worklists

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

Note : When you open the Worklists tab, you will also see two filters ie Filter by Referrer and Filter by Worklist, allowing you to sort the referrals you want to see. Columns can also be sorted by clicking on each heading.



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

These referrals have been considered *clinically inappropriate* for the service they were referred to. Once a referral is rejected it must be actioned by the referrer.

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

Cancelled UBRN

These 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 CAS functionality.

- Review and remove.

DNA

If a patient was referred to a directly bookable service and they DNA'd their appointment, the Provider decided that the referrer should be notified.

The Provider has sent back the UBRN to the referrer for action.

- View the referral and action accordingly.

Awaiting Booking/Acceptance Worklist

Referrals on this worklist should be monitored, but not necessarily actioned.

They will have one of the categories in the Referral Status column:

A&G (Advice & Guidance) Request; Booked; Cancelled by Patient/Provider; Deferred to Provider; Not Yet Booked

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 referrals on this worklist.

Advice & Guidance Responses Worklist

UBRNs on this worklist are sent by a service in response to an A&G Request. You can action them by either removing or converting the UBRN into a Referral Request.

- Select the UBRN and click **View Advice Request.**
- Review the contents, which may include attachments.
- Option 1: Where no further action is required, open the UBRN again and select **Close Advise Request.**
- Option 2: Referral Request required: Select **Update/Book** to convert the UBRN into an Appointment Request.

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, the referral will be removed from this worklist.

The Patient Tab

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

You can search for a patient using one of these three search methods : NHS number, UBRN or Demographics.

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, or 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.

NHS e-Referral Service

QUICK GUIDE

For Referrers

In This Guide

- Referring a Patient
- Attaching a Referral Letter
- Managing Worklists
- The Patient Tab

For further information
https://digital.nhs.uk/referrals

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