



South East
Commissioning Support Unit

Advice and Guidance

e-Referrals

SOUTH EAST / CSU

Original Author: James Davies

The ICT Training Team, SECSU

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Main Subject: Advice and Guidance

Sub Subject: e-Referrals

Notes:

Version Number: 0.1

Advice and Guidance

To perform an advice and guidance request on e-Referrals, you perform all the normal steps in the clinical system as you would do for a normal e-Referral.

When you have completed these usual steps and launched into e-Referrals, to make this an “Advice” request, you have to change the request type to “Advice”

The screenshot displays the NHS e-Referral Service interface. At the top, there is a navigation bar with 'Help', 'Alerts (15)', 'Referring Clinician Admin', 'Preferences', and 'Log Out'. Below this is the 'e-Referral Service' header, which includes 'Patient', 'Gender: Female Date of birth: 29/12/1987 Age: 29 years NHS', and the NHS logo. The main section is titled 'Service Search Criteria'. It features a dropdown for 'Initial Referring Clinician/Organisation' set to 'STEWART.'. Under 'Search By', the 'Request Type' is set to 'Advice' and 'Priority' is set to 'Routine'. A large red arrow points to the 'Request Type' dropdown. Below this is a section for entering search criteria, with a note: 'Enter one or more of the following fields. Entering information in more than one row may reduce the services returned.' This section includes fields for 'Clinical Term', 'Specialty' (set to 'GI and Liver (Medicine and Surgery)'), 'Clinic Type' (set to 'Lower GI (medical) excl IBD'), and 'Named Clinician'. Below the search criteria is a 'Refine Your Search With' section with fields for 'Distance within' (30 miles), 'Postcode' (CT17), 'Indicative Wait Time Less Than' (Days), and 'Organisation or Site Name'. At the bottom of the search criteria section, there are buttons for 'Cancel', 'Add Additional Requirements', 'View/Modify Shortlist', 'Search Primary Care', and 'Search All'. A red arrow points to the 'Search All' button. The bottom of the page shows a 'Release Info' section and a status bar with 'Trusted Site', 'Protected Mode: Off', and a zoom level of 100%.

Once you have completed the fields, click “Search All”

Your results will then be displayed in a new screen. You can only select one “Advice” option.

When you have chosen, click “Request”

e-Referral Service Patient Gender: Female Date of birth: 29/12/1987 Age: 29 years NHS:

Service Selection

Service Search Criteria

Group By: None

(Results returned: 7)

Select	Miles	Appointment Type	Service Name	Indicative Appointment Wait	Indicative Treatment Wait	Directly Bookable	Referrer Alert	Link to NHS Choices	Location
<input checked="" type="radio"/>	0	First outpatient	Gastroenterology (BH Dover)-East Kent Hospitals Trust-RVV	60 Days	23 weeks	Yes			BUCKLAND HOSPITAL
<input type="radio"/>	11	First outpatient	Adult NHS Gastroenterology Service - The Chaucer - BMI - NT4	24 Days	17 weeks	Yes			BMI - THE CHAUCER HOSPITAL
<input type="radio"/>	12	First outpatient	Gastroenterology (KCH Canterbury)-East Kent Hospitals Trust-RVV	63 Days	23 weeks	Yes			KENT & CANTERBURY HOSPITAL
<input type="radio"/>	15	First outpatient	Gastroenterology (WHH Ashford)-East Kent Hospitals Trust-RVV	60 Days	23 weeks	Yes			WILLIAM HARVEY HOSPITAL (ASHFORD)
<input type="radio"/>	17	First outpatient	Gastroenterology (QEOM Margate)-East Kent Hospitals Trust-RVV	66 Days	23 weeks	Yes			QUEEN ELIZABETH THE QUEEN MOTHER HOSPITAL
<input type="radio"/>	18	First outpatient	Gastroenterology (Estuary View)-East Kent Hospitals Trust-RVV	88 Days	23 weeks	Yes			ESTUARY VIEW MEDICAL CENTRE
<input type="radio"/>	29	First outpatient	Adult Gastroenterology - (Exclusions apply) - Benenden Hospital - NWF01	24 Days	23 weeks	Yes			BENENDEN HOSPITAL

Buttons: Cancel Search Criteria Appointment Search Request

Trusted sites | Protected Mode: Off

The next screen is where you can type in your “Advice” letter/request for this service

e-Referral Service Patient Gender: Female Date of birth: 29/12/1987 Age: 29 years NHS:

Advice Request Details

UBRN: 0002 8687
Specialty: GI and Liver (Medicine and Surgery)
Clinic Type: Lower GI (medical) excl. IBD
Clinical Term: -
Referrer Alert: -
Service Name: Gastroenterology (BH Dover)-East Kent Hospitals Trust-RVV
Location: BUCKLAND HOSPITAL
Priority: Routine

*Advice Request Details

TEST TEST

Advice Request Attachments

The attachment you are adding must NOT be a referral letter as this is a request for Advice and Guidance.

Add Attachment

File Name	File Description	Remove
None Found		

Appointments Line follow-up after: 14 Day(s)

Buttons: Don't Submit Submit

Trusted sites | Protected Mode: Off

You can add attachments by clicking “Add attachment”, Click “Submit” when finished

Your request will now go through and the UBRN is created

The screenshot shows the 'e-Referral Service' interface. At the top, there is a navigation bar with 'Help', 'Alerts (18)', 'Referring Clinician Admin', 'Preferences', and 'Log Out'. Below this is a header for 'e-Referral Service' with patient information: 'Patient: Gender: Female Date of birth: 29/12/1987 Age: 29 years NHS'. The main content area is titled 'Advice Request Summary - 0002 8687' and contains 'Advice Request Details'. A red warning message states: '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.' The details include: UBRN: 0002 8687, Service Name: Gastroenterology (BH Dover)-East Kent Hospitals Trust-RVV, Location: BUCKLAND HOSPITAL, Clinical Term: -, Specialty: GI and Liver (Medicine and Surgery), Clinic Type: Lower GI (medical) excl IBD, Priority: Routine, Content Sensitive: No. There is a text input field for 'Advice Request Details' containing 'TEST TEST'. Below this is a table for 'Advice Request Attachments' with columns 'File Name', 'File Description', 'Added By', and 'Date/Time Added', showing 'None Found'. At the bottom right of the main area are buttons for 'Print', 'Update Person', and 'Close'. The footer includes 'Release Info' and a status bar with 'Trusted sites | Protected Mode: Off' and a zoom level of 100%.

Print paper work for the patient notes

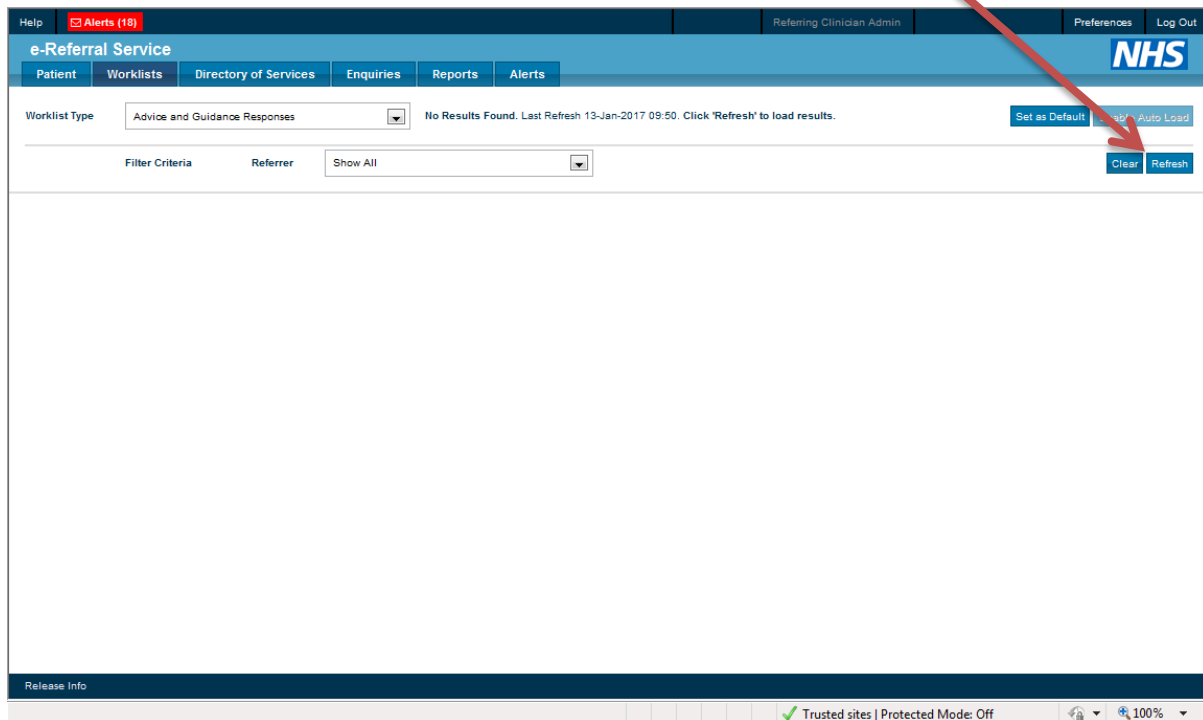
Go back to clinical system as normal and complete the process.

To check responses back for Advice and Guidance

To view the response you have had back from your “Advice” request, go to e-Referrals and into “Worklists”

Under worklist type you will have the option of “Advice and Guidance Responses”

Select this, once you have selected this, do make sure you click the “Refresh” or “Load” button



Once the list has loaded you will be able to see a list of your requests that have had responses

Click the UBRN, you will have the option to click “Actions”

From these options you will be able to see the response back. The response should outline the next action to take.

If the patient does need referring, you can use the same UBRN and by clicking “Update/Book” you will be able to use e-Referrals as normal without having to create a new UBRN.

If you would like to book e-Referrals training with the ICT Training Team for “Advice and Guidance” please contact the SECSU Service Desk:

03000 424242