

Create an e-RS referral from Consultations

1. Log on to EMIS Web with a smartcard.

You cannot access eRS if you log on without a smartcard.

2. Access Consultations.

Click , point to **Care Record**, and then click **Consultations**.

If you do not have a patient selected, you're prompted to choose one.

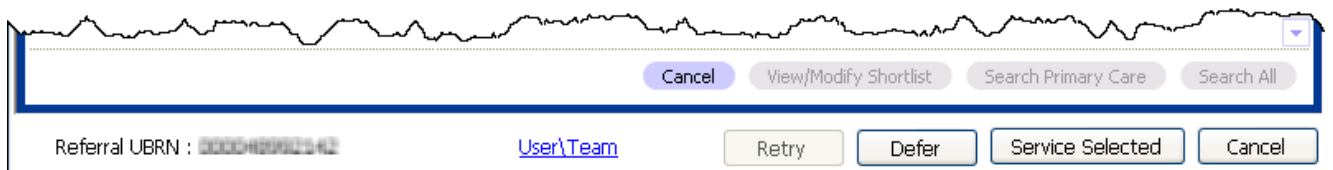
The Consultations screen is displayed.

3. If necessary, [manage any PDS differences](#).
4. On the ribbon, click **Add** and then select **Consultation**.
5. On the Consultation Mode screen, click **Referral** in the left-hand pane, point to **Choose and Book Referral**, and then click one of the following:
 - **Routine**
 - **Urgent**
 - **2 Week Rule**

The eRS portal is launched within EMIS Web, and the Service Selection screen is displayed, showing the UBRN for the referral at the bottom left-hand side of the screen.

If the UBRN retrieval process fails (i.e. no UBRN is displayed), click **Retry** at the bottom right-hand side of the screen. If the UBRN retrieval process still fails, a Pending UBRN task is added to Referral Management, to remind you to obtain a UBRN at a later date.

6. On the eRS portal, select your required service, then at the bottom right-hand side of the eRS Service Selection screen, select one of the following options:



eRS Service Selection screen options

- If you want to continue the referral process, click **Service Selected** and **I have selected a service**.
If you have not completed the service selection process in eRS when you click Service Selected, a warning message is displayed. If this happens, do one of the following:
 - To mark the referral as Service Selected and continue with the referral process, click **Yes**.
 - To close the message, return to the eRS website and complete the service selection process, click **No**.

- If you have not yet selected a service and want to pause the referral process at this point, click **Defer**.
If you select this option, the following changes are made:
 - The UBRN is saved to the patient's care record in EMIS Web.
 - A Pending CAB Service Selection task is created in Referral Management. To complete the referral, you need to access eRS (CAB icon) from Referral Management at a later stage and select a referral service.
 - eRS closes, and the CAB Referral screen is displayed in EMIS Web, with some information already completed. You now need to complete the CAB Referral screen to record the referral details in EMIS Web.
 - If you want to cancel the referral process, click **I have abandoned the process** in the Service Selected field.
If you select this option, you also need to access eRS again and cancel the UBRN. eRS closes, and the CAB Referral screen is displayed in EMIS Web, with some fields already completed.
7. On the CAB Referral screen, complete the remaining referral details, using the following table as a guide:

Mandatory fields are indicated by a red asterisk *. If you don't complete a mandatory field, a warning icon  is displayed beside the field.

Example CAB Referral screen

Field	How to complete
*Referral Source	The details of the referring clinician are displayed.
*Referral Target	Choose & Book Service is displayed.
*Clinical Term	Click  , and select the required clinical term (Read code). The default is today's date.
Referral Date	Change Date. If required, click  to select the required date.
Urgency	The urgency you selected when creating the referral is displayed.
Referral Mode	Electronic is displayed.
*Purpose	Click  and select the required purpose.
Reason for Referral	If required, type a brief reason for the referral.
*NHS/Private	The default is NHS Referral. If required, select Private Referral .
*Transport	The default is None. If required, click  and select the patient's transport needs.
Linked Problem(s)	If required, click  , to select the required clinical problem(s).

8. Beside the Referral Letter field, do one of the following:

To send a task to an administrator to create an integrated referral letter and complete the referral:

- On the CAB Referral screen, beside the Referral Letter field, select **Create Letter Task For**.
- Click **User/Team**, use the Find User/Team screen to select the required user or team, and then click **OK**.
A Pending Letter task is created in Referral Management for another user or team to complete the referral.

To continue the referral process:

- Select **Create Now**.
 - Use the [Generate Choose and Book Letter screen](#) to create an integrated referral letter and add attachments, if required.
9. Click **OK**.
The referral details are displayed in the Referrals section of the patient's care record.