

NHS Community e-Referrals User Guide – SystmOne TPP

**Please Use This Guide for Practices in:
North West London CCG's**

Version:	1.8
Author	Primary Care Systems Team
Filename:	NHS Community e-Referrals User Guide - SystmOne TPP
Path:	\\nwllondon.local\nwl\ICT\Primary Care\16. Projects\9. NHS e-Referrals
Date issued:	June 2018
Review date:	July 2019
Target audience:	SystmOne General Practices in North West London CCG's - London

Contents

Introduction	3
1. How to initiate a NHS e-Referral within SystmOne TPP	4
2. How to Make a Direct Booking	9
Booking into the Community Dermatology Service.....	9
3. How to refer into a Referral Assessment Service (RAS) Service	14
Booking into the Community Minor Surgery Service	19
4. How to Write a Referral Letter	22
5. Attach a SystmOne Referral Letter	26
6. Monitoring your e-RS Worklists	28
Checking Triage Status for Minor Surgery Service (Appropriate Service)	30
Checking Triage Status for Minor Surgery Service (Inappropriate service)	31
Checking for Rejected Referrals for Dermatology & Minor Surgery -Inappropriate Service.....	32
Checking Outstanding Referrals Letters	33
Glossary:.....	34
Disclaimer:.....	34

Introduction

This document is intended to act as a reference to enable GP Practices to successfully navigate SystmOne TPP in order to produce meaningful **NHS Community e-Referrals**.

E-RS (previously Choose and Book) is an **electronic referral and management system**, using Spine information, that can integrate with other systems.

This guidance document provides North West London GP practices with instructions on **how to make a Community NHS e-Referral** and **create and attach a SystmOne referral letter**.

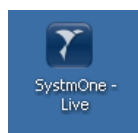
Making a referral is always the responsibility of the referring clinician, who with the patient, should decide on the most clinically appropriate options for the referral and onward pathway.

There are Three (3) parts to the making a NHS e-Referral community booking:

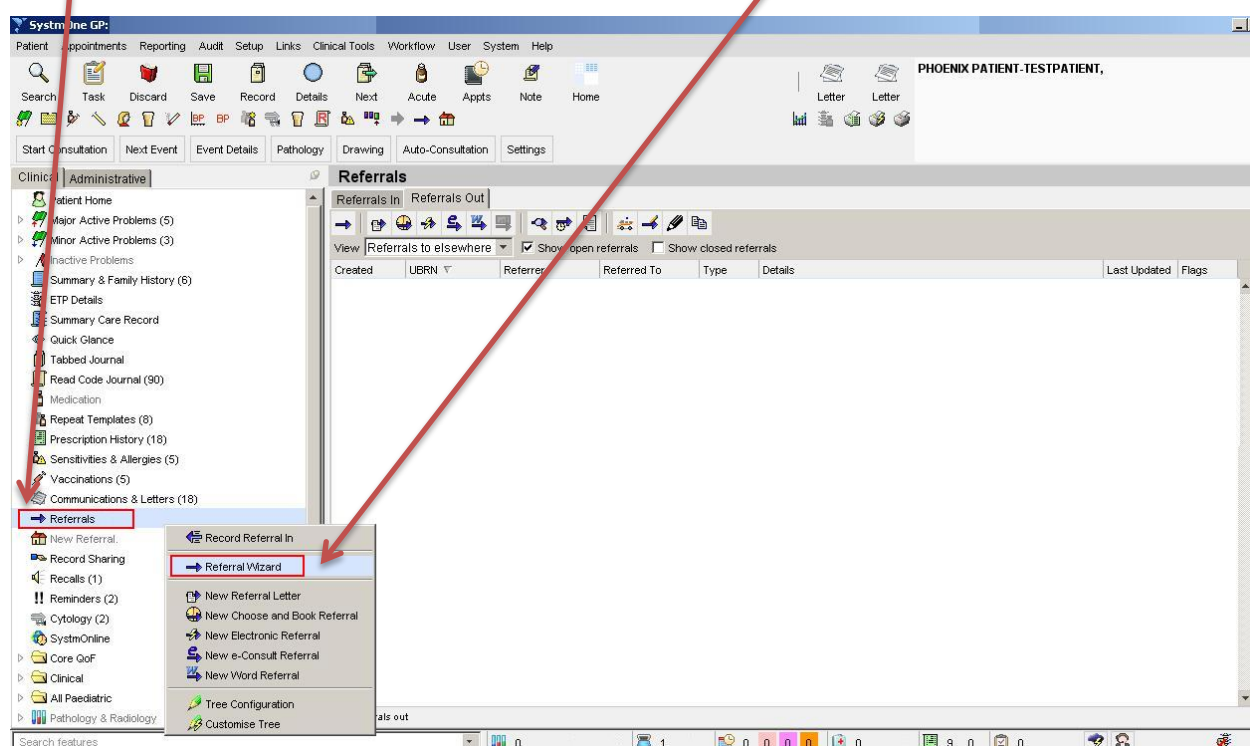
1. How to initiate a Community NHS e-Referral within SystmOne TPP
2. Create a SystmOne Referral Letter
3. Attach a SystmOne Referral Letter

1. How to initiate a NHS e-Referral within SystmOne TPP

1. Logon on to SystmOne TPP

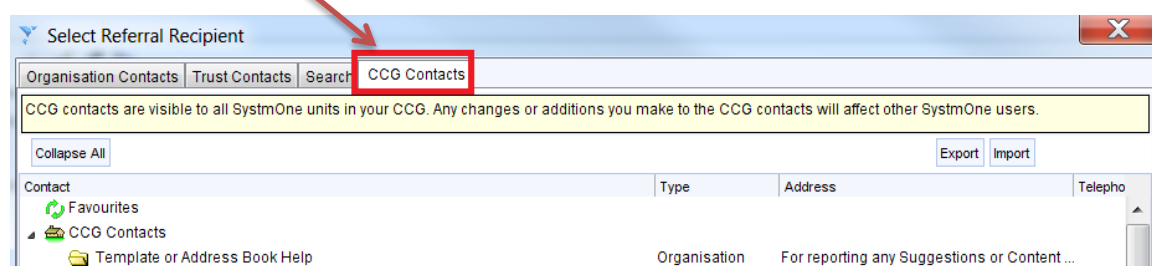


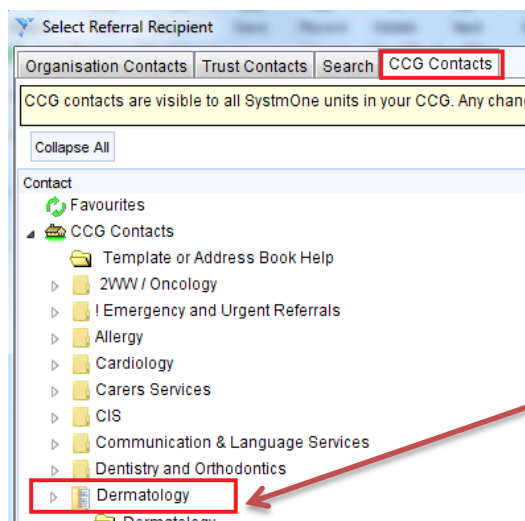
2. Open the patient's record and complete their consultation. Within the open patient record Right click on **'Referrals'** in the clinical tree then left click on the **'Referral Wizard'** sub-menu option, as shown in the screen shot below.



3. Then **'Select Referral Recipient'** dialogue box appears as shown below.

- a. Left Click on **'CCG Contacts'** tab





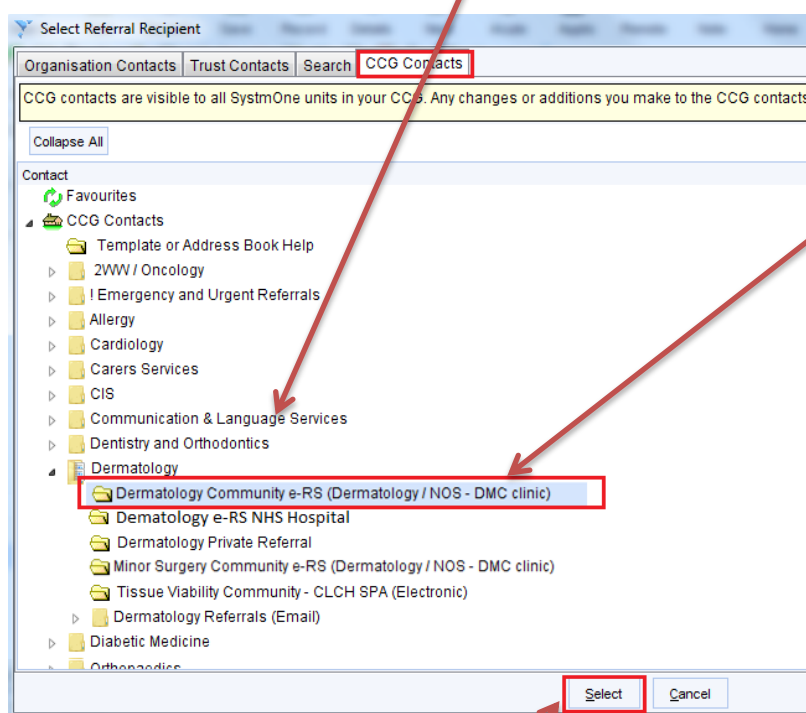
b. Left click to select the speciality in this case '**Dermatology**'

c. Left Click on White Triangle to expand the Dermatology tree (as shown in the shown in the screen shot below)



d. The '**Dermatology**' folder will be expanded and it will list the appropriate services per folder as shown in the screen shot below.

e. Navigate to the appropriate service by left clicking to expand the service selection (folders) and then finally Left Click to highlight the appropriate service (in this example we will pick '**Dermatology Community e-RS (Dermatology NOS – DMC Clinic)** '). See screen shot below.



Please Note:

(Dermatology / NOS – DMC Clinic) in the S1 address book shows what **Speciality** and **Clinic Type** you need to select on the e-RS website.

a. Left Click on the **Select** button

4. You will see the **'Choose and book Referrals Options'** dialogue box below.
 - a. Left click to Select the **Referring Clinician** (if your name does not appear)
 - b. Set the appropriate referral priority either **Routine** or **Urgent**

Note: If it is a **2 Week Wait** then you should select the 2ww option from the CCG address book as per **step 3b** and not refer to the community service.

- c. Click **OK**

5. The **'Requesting UBRN from Spine'** dialogue box appears as shown below.

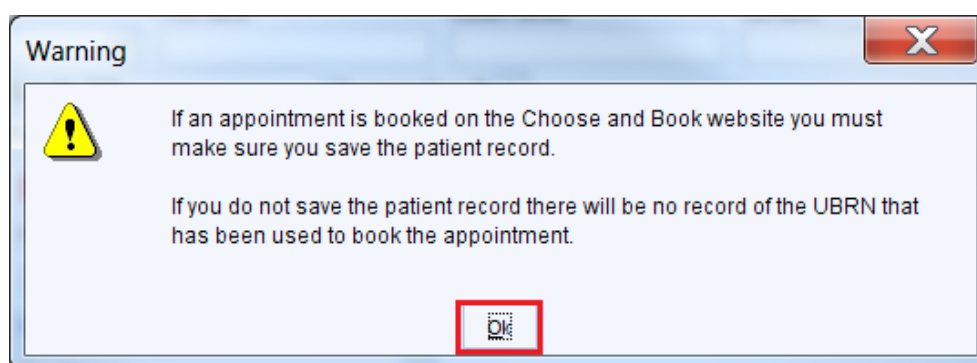
6. Then **'New Choose and Book Referral'** dialogue box appears as shown below.

7. Left Click on **'Book Appointment'** Button

Urgency

Referral summary

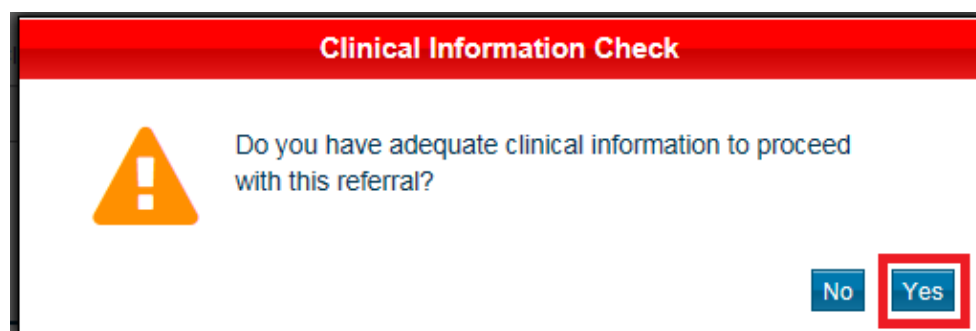
8. A warning dialogue box appears as shown below. Left Click on **OK**.



9. Internet Explorer browser will be launched with the following text displayed



10. The message below will appear. Ensure you have the necessary clinical information to complete the referral. Click 'Yes' to proceed.



11. The 'Service Search Criteria' screen will be displayed as shown below.

a. Populate the 'Initial Referring Clinician/Organisation' field. (if not already done so)

b. The 'Request Type' and 'Priority' fields should be pre-populated as follows:

c. Using the drop down menus, select the appropriate 'Specialty' and 'Clinic Type' (in this example 'Dermatology' and 'Not Otherwise Specified' are used respectively).

- d. The 'Service Search Criteria' screen will be populated as shown below. Left click on 'Search Primary Care'

The screenshot shows the 'Service Search Criteria' screen. At the top, there's a patient summary: Patient: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms) Gender: Female Date of birth: 04/05/1939 Age: 78 years NHS: 999 015 8401. Below this, the 'Service Search Criteria - 0002 9697 8728' section contains various filters. A red arrow points from the text 'Search Primary Care' to the 'Search Primary Care' button at the bottom right of the form.

12. The 'Service Selection' screen will display the results of the search, as shown below:

The screenshot shows the 'Service Selection' screen with the following table of results:

Select	Miles	Appointment Type	Service Name	Indicative Appointment Wait 0	Indicative Treatment Wait 0	Directly Bookable	Referrer Alert	Link to NHS Choices	Location
☐	3	First outpatient	DMC Community Dermatology - Ashville Surgery	21 Days		Yes	!	!	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM - ASHVILLE SURGERY
☒	3	First outpatient	DMC Community Dermatology - Parsons Green Health Centre	Limited Availability		Yes	!	!	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	3	First outpatient	DMC Community Dermatology Service - Parkview Centre	5 Days		Yes	!	!	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	3	Triage Service	DMC Community Minor Ops - Hammersmith & Fulham	N/A		N/A	!	!	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

A red arrow points from the text 'Appointment Search' to the 'Appointment Search' button at the bottom right of the screen.

13. Select the appropriate Community service by ticking the **Select** box as shown above ☒

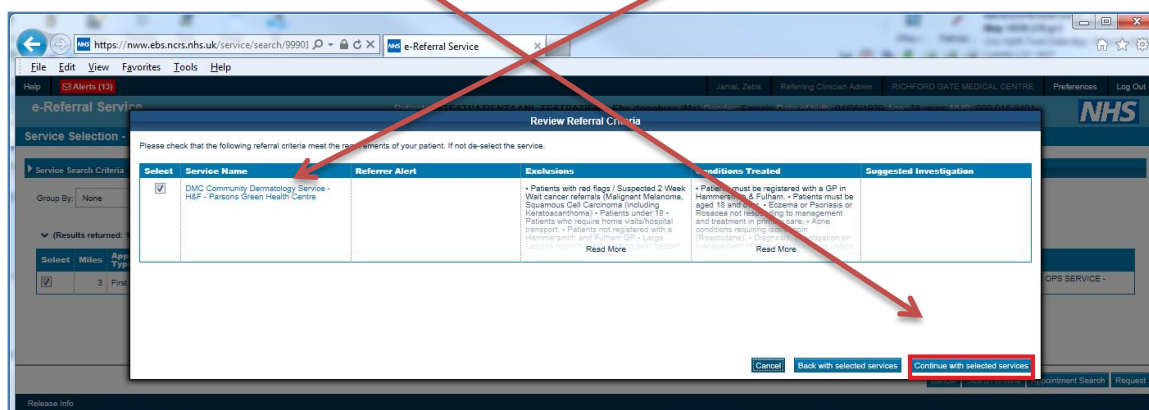
Please Note: Making a referral **is always the responsibility of the referring clinician**, who with the patient, should decide on the most clinically appropriate options for the referral and onward pathway.

2. How to Make a Direct Booking

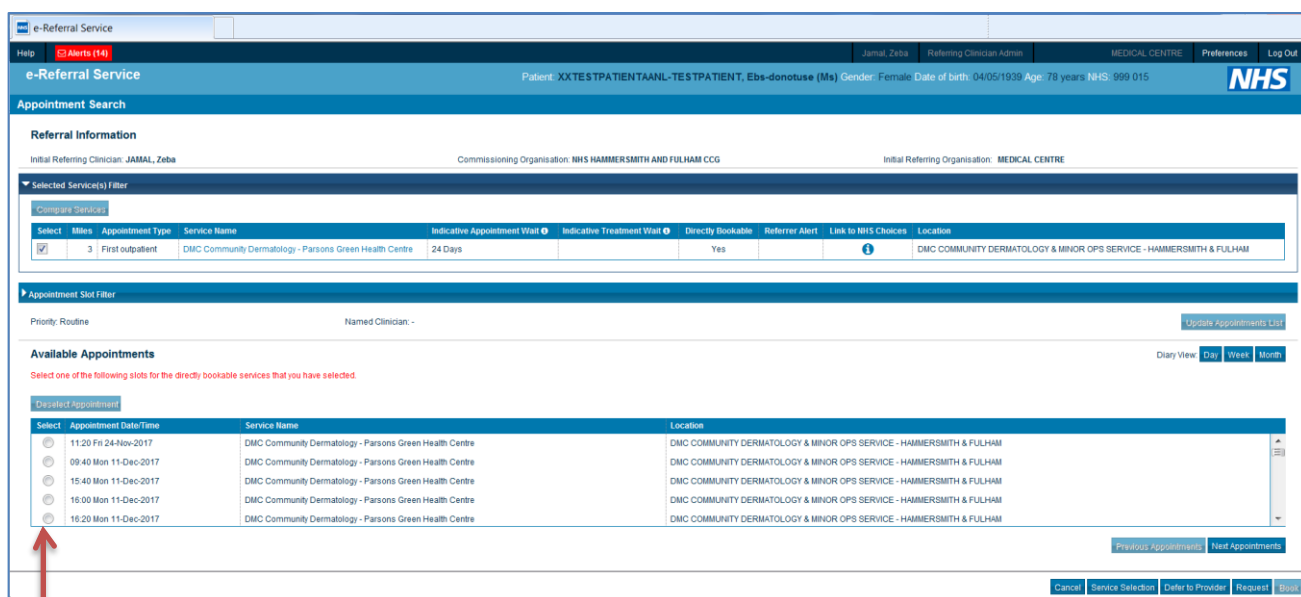
Booking into the Community Dermatology Service

14. To make a direct booking click on 'Appointment Search' button on the Service Selection Screen. As shown in previous screen shot above.

15. You will see the 'Review Referral Criteria' Screen as shown below. Ensure the referral meets the criteria by reviewing the exclusions, conditions treated and suggested investigations column. If you require additional information (such as procedures performed, administrative requirements, service notes and alternative services click on the hyperlink of the service name). Click on **Continue with selected services** button.



- a. The 'Appointment Search' screen will display as shown below for Dermatology Services.



- b. Please ensure that you make a booking by clicking on the appropriate 'radio button' according to patient's choice of date and time of appointment.
- c. Once this is done, click on 'Book'

Please Note: You **must book an appointment** rather than request it as the service will be unable to process the request until the patient books the appointment themselves. **The service cannot download the referral letter until the appointment has been booked.**

e-Referral Service

Help Alerts (14) Jamal, Zeba Referring Clinician Admin MEDICAL CENTRE Preferences Log Out

e-Referral Service Patient: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms) Gender: Female Date of birth: 04/05/1939 Age: 79 years NHS: 999 015

Appointment Search

Referral Information

Initial Referring Clinician: JAMAL, Zeba Commissioning Organisation: NHS HAMMERSMITH AND FULHAM CCG Initial Referring Organisation: 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
☒	3	First outpatient	DMC Community Dermatology - Parsons Green Health Centre	24 Days		Yes			DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

Appointment Slot Filter

Priority: Routine Named Clinician: - Update Appointments List

Available Appointments

Select one of the following slots for the directly bookable services that you have selected.

Diary View: Day Week Month

Disselect Appointment

Select	Appointment Date/Time	Service Name	Location
☒	11:20 Fri 24-Nov-2017	DMC Community Dermatology - Parsons Green Health Centre	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	09:40 Mon 11-Dec-2017	DMC Community Dermatology - Parsons Green Health Centre	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	15:40 Mon 11-Dec-2017	DMC Community Dermatology - Parsons Green Health Centre	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	16:00 Mon 11-Dec-2017	DMC Community Dermatology - Parsons Green Health Centre	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	16:20 Mon 11-Dec-2017	DMC Community Dermatology - Parsons Green Health Centre	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

Previous Appointments Next Appointments

Cancel Service Selection Defer to Provider Request Back

Please Wait

e-Referral Service is waiting for a response from the hospital Patient Administration System.

- d. The 'Check Patients Details' dialog box will display as shown below, Left Click 'OK'.

Please Note: If the patient's details need to be changed, at this point you will need to go back into SystmOne and update their details there. This booking request will be disregarded and you will need to start again.

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: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)

Address: 15 Marylebone Road
London
NW1 5JD

Consent to Call Back: Yes

Telephone: Mobile : 07803032170

Update Person OK

16. Check the Appointment Details (for Dermatology services)

- a. Click on 'Submit'

e-Referral Service

Help
Alerts (14)
Jamal, Zeba
Referring Clinician Admin
MEDICAL CENTRE
Preferences
Log Out

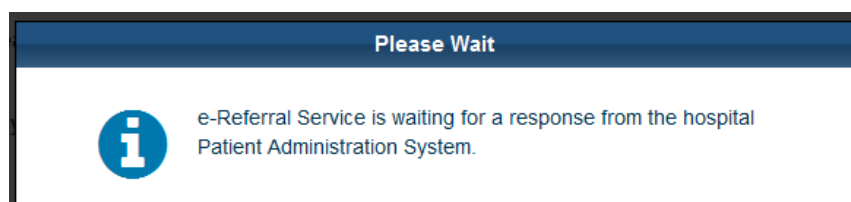
e-Referral Service
Patient: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms) Gender: Female Date of birth: 04/05/1939 Age: 78 years NHS: 999 015
NHS

Appointment Details

UBRN	0002 9952 1403
Appointment Date/Time	Mon 11-Dec-2017 16:20
Duration	20 minutes
Clinical Term	-
Specialty	Dermatology
Clinic Type	Not Otherwise Specified
Allocated Clinician	Kazmi, Ahmed
Service Name	DMC Community Dermatology - Parsons Green Health Centre
Organisation Type	Independent Sector Healthcare Provider HQ
Priority	Routine
Appointment Instructions	Community Dermatology - this referral will be triaged and the appointment may be cancelled if necessary

☒ Referral Letter Outstanding, will add at a later time

Don't Submit
Submit



17. The 'Appointment Summary' Screen is shown.

e-Referral Service

Help
Alerts (14)
Jamal, Zeba
Referring Clinician Admin
MEDICAL CENTRE
Preferences
Log Out

e-Referral Service
Patient: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms) Gender: Female Date of birth: 04/05/1939 Age: 78 years NHS: 999 015
NHS

Appointment Summary - 0002 9952 1403

Appointment Details

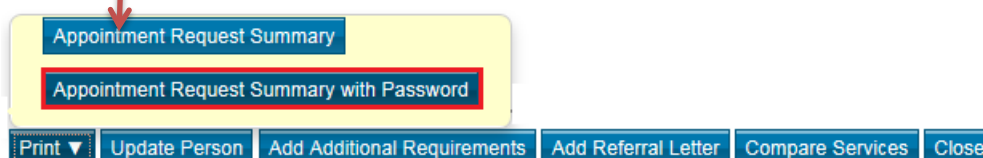
Appointment Details
The patient's Consent to Call Back is defined as Yes. If the patient wants to change the Consent to Call Back, enter the change in Update Person.

UBRN Created Date	Fri 17-Nov-2017 17:17
UBRN	0002 9952 1403
Appointment Date/Time	Mon 11-Dec-2017 16:20
Duration	20 minutes
Clinical Term	-
Location	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
Service Name	DMC Community Dermatology - Parsons Green Health Centre
Organisation Type	Independent Sector Healthcare Provider HQ
Specialty	Dermatology
Clinic Type	Not Otherwise Specified
Allocated Clinician	KAZMI, Ahmed (Dr)
Priority	Routine
Content Sensitive	No
Appointment Instructions	Community Dermatology - this referral will be triaged and the appointment may be cancelled if necessary

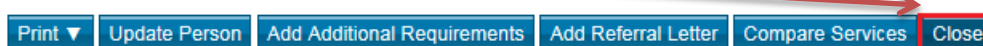
Print
Update Person
Add Additional Requirements
Add Referral Letter
Close

18. Left Click on 'Print' to show further options.

- i. Click on **'Appointment Request Summary with Password'** to print the appointment summary with a Password. This is needed for a patient to ring the telephone Appointments Line (TAL) or on the website to book or modify their appointment as required. This is the required option and should be used in all cases unless specified by the patient.



- ii. Click on **Close**.



- iii. The Patient Search Screen is displayed. Click on **'Log Out'** to end the NHS e-Referral part of the process.

Please Note: Ensure that **'Close'** is clicked before **'Log Out'** otherwise the referral booking will not be saved and the process will need to be done again within SystmOne.

19. You may now close your browser

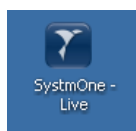


20. The patient will at this point have their details on a printout.

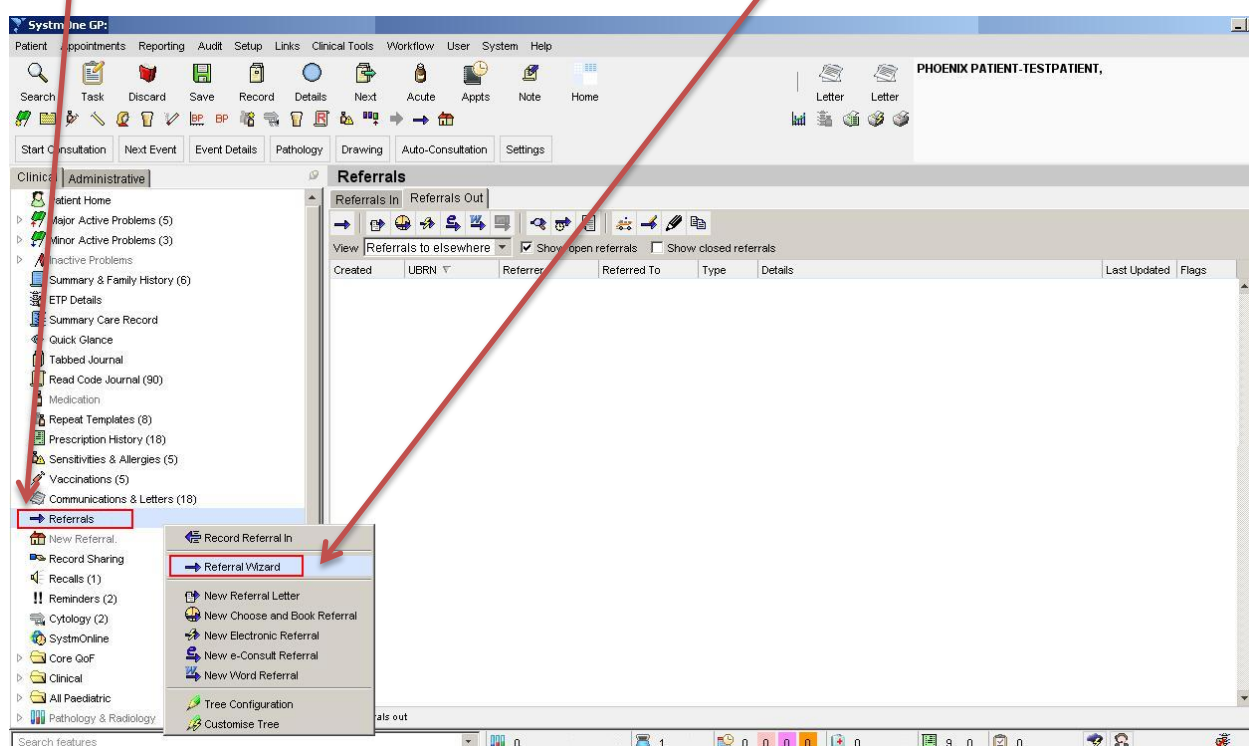
21. To 'Write the Referral Letter' go to **4** section page 22.

3. How to refer into a Referral Assessment Service (RAS) Service

Logon on to SystmOne TPP (if not done so already)

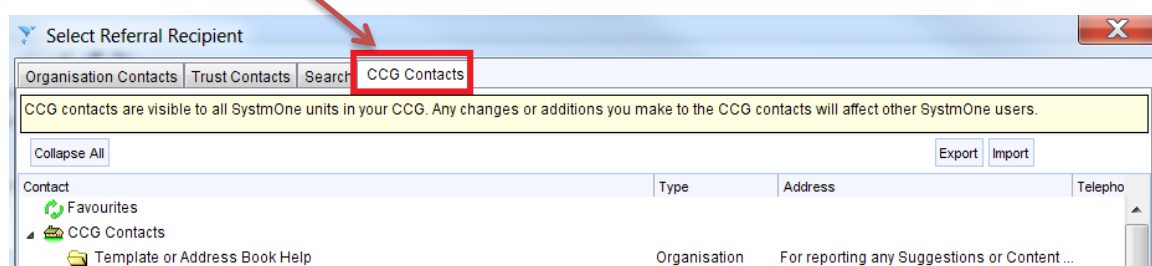


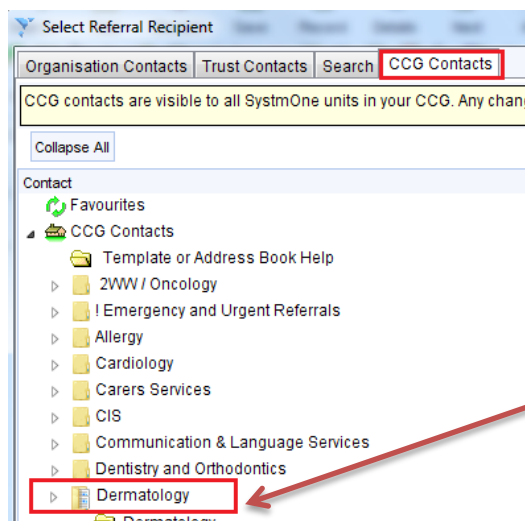
22. Open the patient's record and complete their consultation. Within the open patient record Right click on **'Referrals'** in the clinical tree then left click on the **'Referral Wizard'** sub-menu option, as shown in the screen shot below.



23. Then **'Select Referral Recipient'** dialogue box appears as shown below.

- a. Left Click on **'CCG Contacts'** tab





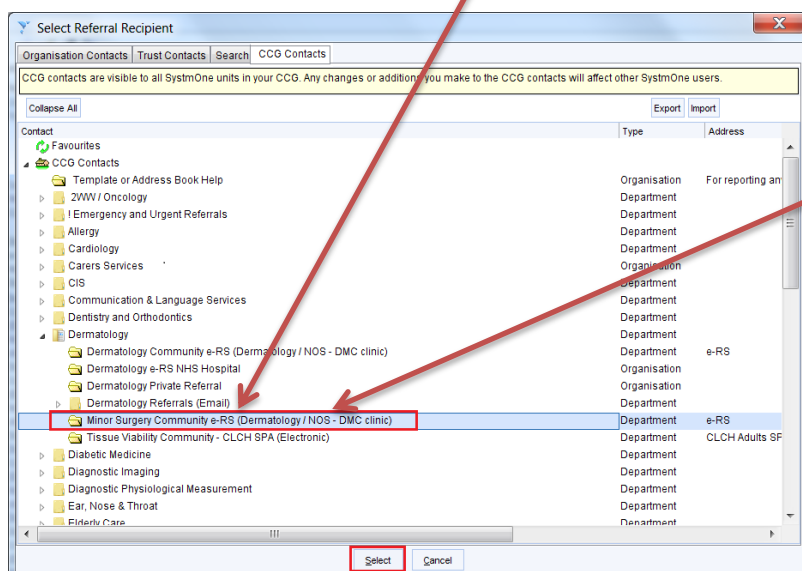
b. Left click to select the speciality in this case '**Dermatology**'

c. **Left Click on White Triangle** to expand the Dermatology tree (as shown in the shown in the screen shot below)



d. The '**Dermatology**' folder will be expanded and it will list the appropriate services per folder as shown in the screen shot below.

e. Navigate to the appropriate service by left clicking to expand the service selection (folders) and then finally **Left Click** to highlight the appropriate service (in this example we will pick '**Minor Surgery Community e-RS (Dermatology NOS – DMC Clinic)**'). See screen shot below.



Please Note:

(**Dermatology / NOS – DMC Clinic**) in the S1 address book shows what **Speciality** and **Clinic Type** you need to select on the e-RS website to book onto the Community Minor Surgery Clinic.

b. **Left Click** on the **Select** button

24. You will see the '**Choose and book Referrals Options**' dialogue box below.

a. Left click to Select the **Referring Clinician** (if your name does not appear)

b. Set the appropriate referral priority either **Routine** or **Urgent**

Note: If it is a **2 Week Wait** then you should select the **2ww** option from the CCG address book as per **step 3b** and not refer to the community service.

c. Click **OK**

25. The **'Requesting UBRN from Spine'** dialogue box appears as shown below.

26. Then **'New Choose and Book Referral'** dialogue box appears as shown below.

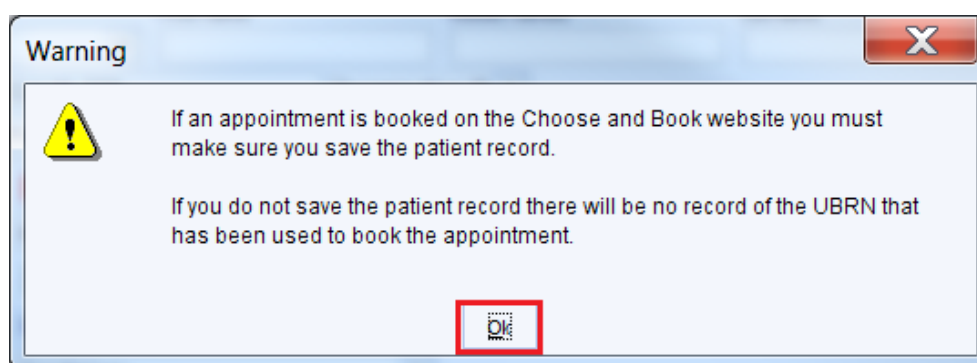
a. As this is a Minor Surgery Referral the Readcode will be Referral to **'Community Dermatology Service'**

27. Left Click on **'Book Appointment'** Button

Urgency

Referral summary

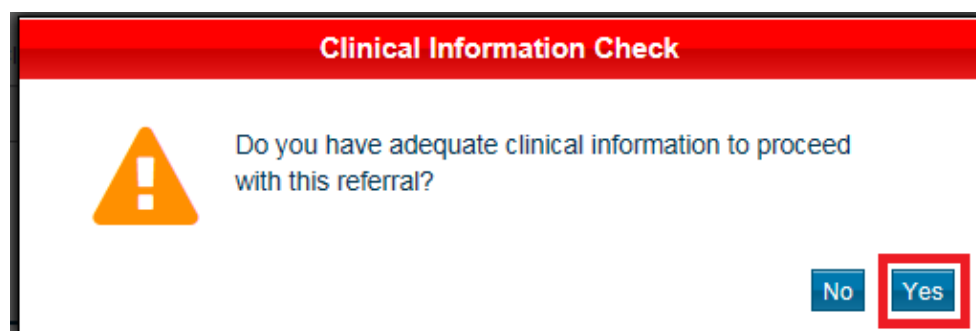
28. A warning dialogue box appears as shown below. Left Click on **OK**.



29. Internet Explorer browser will be launched with the following text displayed



30. The message below will appear. Ensure you have the necessary clinical information to complete the referral. Click 'Yes' to proceed.



31. The 'Service Search Criteria' screen will be displayed as shown below.

a. Populate the 'Initial Referring Clinician/Organisation' field. (if not already done so)

b. The 'Request Type' and 'Priority' fields should be pre-populated as follows:

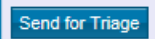
c. Using the drop down menus, select the appropriate 'Specialty' and 'Clinic Type' (For the Minor Surgery Service 'Dermatology' and 'Not Otherwise Specified' are used respectively).

- d. The 'Service Search Criteria' screen will be populated as shown below. Left click on 'Search Primary Care'

Booking into the Community Minor Surgery Service

32. The 'Service Selection' screen will display the results of the search, as shown below:

Select	Miles	Appointment Type	Service Name	Indicative Appointment Wait	Indicative Treatment Wait	Directly Bookable	Referrer Alert	Link to NHS Choices	Location
☐	3	First outpatient	DMC Community Dermatology - Ashville Surgery	21 Days		Yes	1	1	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM - ASHVILLE SURGERY
☐	3	First outpatient	DMC Community Dermatology - Parsons Green Health Centre	Limited Availability		Yes	1	1	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	3	First outpatient	DMC Community Dermatology Service - Parkview Centre	5 Days		Yes	1	1	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM
☐	3	Triage Service	DMC Community Minor Ops - Hammersmith & Fulham	N/A		N/A	1	1	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

33. To make a Referral Assessment Service (RAS) booking for the **Minor Surgery** Clinic left click on 'Send for Triage' button  on the select column within the Service Selection Screen. As shown above.

Please note: Making a referral **is always the responsibility of the referring clinician**, who with the patient, should decide on the most clinically appropriate options for the referral and onward pathway.

34. You will see the 'Review Referral Criteria' Screen for Minor Surgery service as shown below. Ensure the referral meets the criteria by reviewing the exclusions, conditions treated and suggested investigations column. If you require additional information (such as procedures performed, administrative requirements, service notes and alternative services click on the hyperlink of the service name). Otherwise click on **Continue with selected services** button.

Review Referral Criteria

Please check that the following referral criteria meet the requirements of your patient. If not de-select the service.

Select	Service Name	Referrer Alert	Exclusions	Conditions Treated	Suggested Investigation
☒	DMC Community Minor Ops - Hammersmith & Fulham	Please attach referral letter at the time of referring	Minor Surgery Procedures. Most of the following conditions would be expected to be treated in Primary Care (with some exceptions - see 'Inclusions' above): • Anal skin tags • Benign pigmented moles • Comedones • Cornicallouses • Benign cutaneous haemangiomas e.g. Campbell de Morgan spots • Lipomas • Nails • Molluscum contagiosum • Mucoid cysts • Sebaceous cysts (epidermoid or other cysts) • Sebaceous keratosis (basal cell papillomata) • Skin tags • Warts (non-genital)	Minor Surgery Procedures The service will deliver procedures on the following clinical conditions and which are in line with NWL CCGs PPA Policy on benign lesions and lumps. Because of the subjective nature of symptoms and guideline interpretation, the referrer is encouraged to provide as much helpful information as possible about the symptoms raised by the lesion, using the standard referral template (see below).	Read More

Buttons: Cancel, Back with selected services, Continue with selected services

Please Wait

i e-Referral Service is waiting for a response from the hospital Patient Administration System.

- a. The 'Check Patients Details' dialog box will display as shown below, Left Click 'OK'.

Please Note: If the patient's details need to be changed, at this point you will need to go back into SystmOne and update their details there. This booking request will be disregarded and you will need to start again.

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: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)

Address: 15 Marylebone Road
London
NW1 5JD

Consent to Call Back: Yes

Telephone: Mobile : 07803032170

Buttons: Update Person, OK

35. For **Minor Surgery** services the following screen is displayed below.

- a. Click on '**Submit**'
- b. The request will go to the DMC service who will process this triage request with 3 working days and will contact the patient and offer them an appointment within 4 weeks.

https://www.ebs.ncrs.nhs.uk/service/search/9990158401 e-Referral Service

File Edit View Favorites Tools Help

Help Alerts (1)

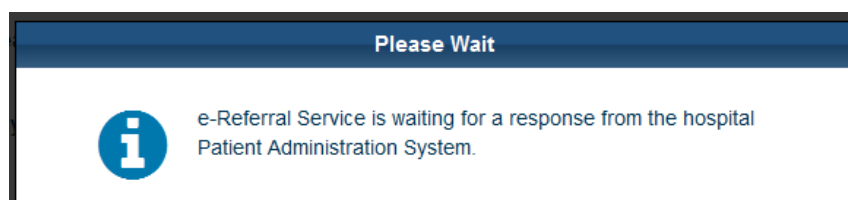
e-Referral Service

Triage Request Details – 0003 0893 6954

Check These Details Before You Submit

UBRN	0003 0893 6954
Clinical Term	-
Specialty	Dermatology
Clinic Type	Not Otherwise Specified
Priority	Routine
Service Name	DMC Community Minor Ops - Hammersmith & Fulham
Location	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

[Back](#) [Submit](#)



36. The '**Appointment Summary**' Screen is shown.

https://www.ebs.ncrs.nhs.uk/service/search/9990158401 e-Referral Service

File Edit View Favorites Tools Help

Help Alerts (1)

e-Referral Service

Patient: XXTESTPATIENTAANLTESTPATIENT, Ebs-donotuse (M4) Gender: Female Date of birth: 04/05/1939 Age: 79 years NHS: 999 015 8401

Triage Request Summary - 0003 0975 0351

Triage Request Details

The triage request has been successfully submitted

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	Wed 27-Jan-2018 11:39
UBRN	0003 0975 0351
Clinical Term	-
Specialty	Dermatology
Clinic Type	Not Otherwise Specified
Priority	Routine
Content Sensitive	No
Service Name	DMC Community Minor Ops - Hammersmith & Fulham
Location	DMC COMMUNITY DERMATOLOGY & MINOR OPS SERVICE - HAMMERSMITH & FULHAM

Clinical referral information (e.g. Referral Letter) must be added for the triage to take place.

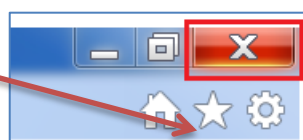
[Update Person](#) [Add Additional Requirements](#) [Add Referral Letter](#) [Close](#)

37. Left Click on '**Close**'.

Please Note: Ensure that 'Close' is clicked before 'Log Out' otherwise the referral booking will not be saved and the process will need to be done again within SystmOne.

38. Click on **Logout**

39. Click on **X** to close the browser



40. The patient will be contacted directly by the Minor Surgery Service and offered an appointment within 4 weeks.

41. To 'Write the Referral Letter' go to next section.

4. How to Write a Referral Letter

42. The appointment booking process has been completed. After this the SystmOne screen will be displayed as shown below, to complete the letter.

a. Click on 'Write Now' button to write the referral letter now.

43. The **'NHS e-Referral'** screen is displayed as shown below.

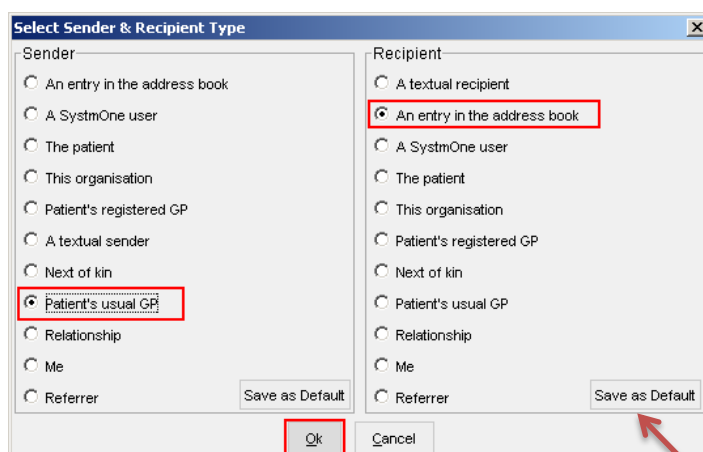
- a. Click on **'Letter'** button

44. The **'Attach Letter'** dialogue box is displayed

- a. Click on **'New'** button

45. The **'Select Sender and Recipient Type'** Dialogue box is displayed

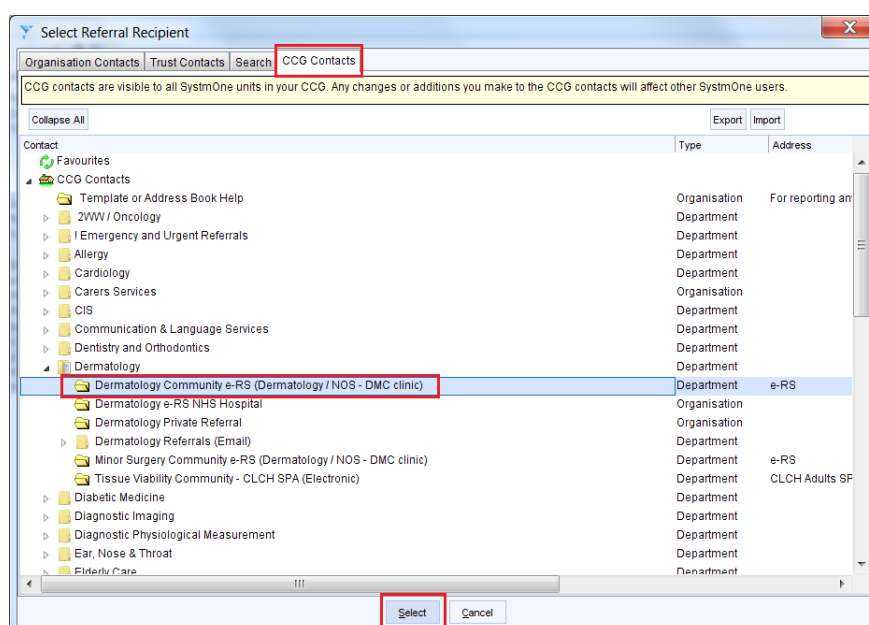
- a. Click on the relevant radio button. In the example below the options chosen are:
 - i. Sender - Patient's usual GP (or **Me** if you are the GP)
 - ii. Recipient – An entry in the address book
 - iii. Click on '**OK**'



Please Note: The above options can be saved by clicking on the '**Save as Default**' button.

46. The Select Recipient dialogue box is displayed. The example below shows **Community Dermatology** is selected.

- a. Click on the '**Select**' button.

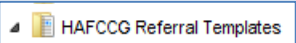
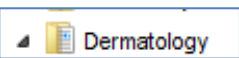


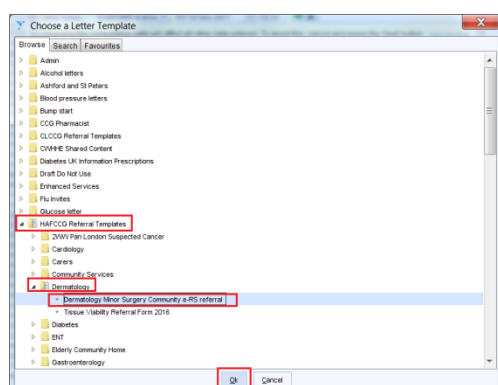
47. The '**New Letter**' dialogue box is displayed

- a. Check '**Recipient**' and '**Sender**' details are correct

- b. Click on **'Letter Type'** drop down menu  and select **'Choose and Book Referral'**.
 - i. Click on **'Save as Default'** button. To keep this option for future referrals.
- c. Click on **'MS Word'** radio button.
- d. Click on **'Choose Template'** button

48. The **'Choose a Letter'** dialogue box is displayed as shown below.

- a. Expand **'HAFCCG Referral Templates'** folder 
- b. Expand **'Dermatology'** folder 
- c. Select **'Dermatology Minor Surgery Community e-RS Referral'** letter template as highlighted below.
- d. Click **'OK'**.



49. The **'New Letter Template'** dialogue box will be displayed again (as shown in point 27).

- a. Click on the **'Write Now'** button at the bottom of the screen.

- b. A **'SystemOne'** dialogue box with 'Loading Word...' will be displayed.

50. An MS Word document will open as displayed below.

- a. Edit referral letter as required.
- b. Click on **'Save Final Version'** button.

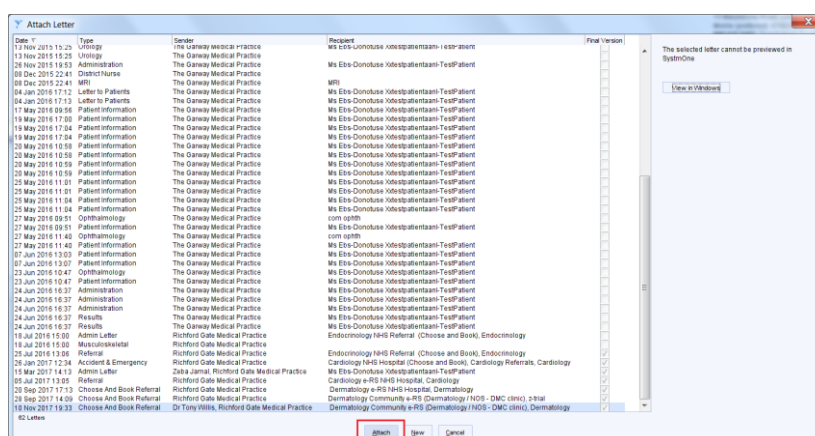


Referral priority	ZWW ☐ Urgent ☐ Routine ☐	Ethnicity	
Referral type	Dermatology ☐ Minor Surgery ☐	Main Language	language not specified
Is patient a wheelchair user?	Yes ☐ No ☐	English spoken	Yes ☐ No ☐
Transport to be arranged by	Patient ☐ Provider ☐ Referrer ☐	Translator required	Yes ☐ No ☐
Preferred choice of provider	Provider A	Safeguarding issues	Yes ☐ No ☐

5. Attach a SystemOne Referral Letter

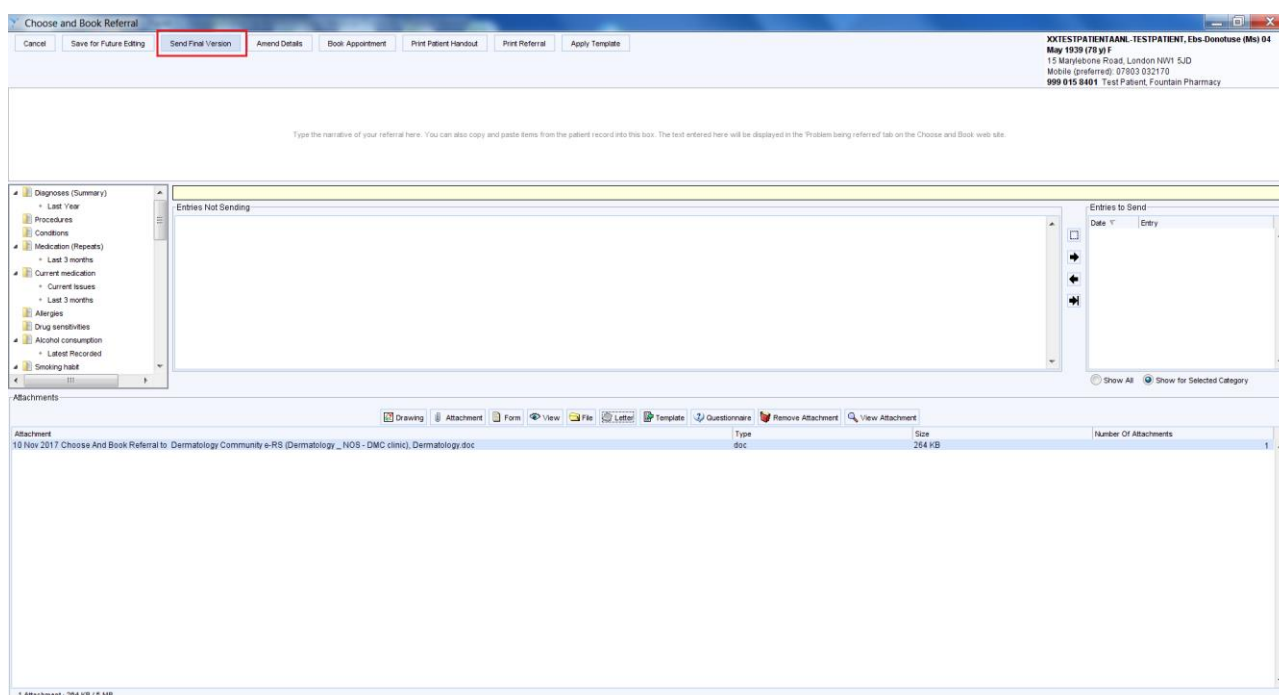
51. The **'Attach Letter'** dialogue box will be displayed again the new referral letter will be highlighted in blue as shown below.

- a. Click on the **'Attach'** button.



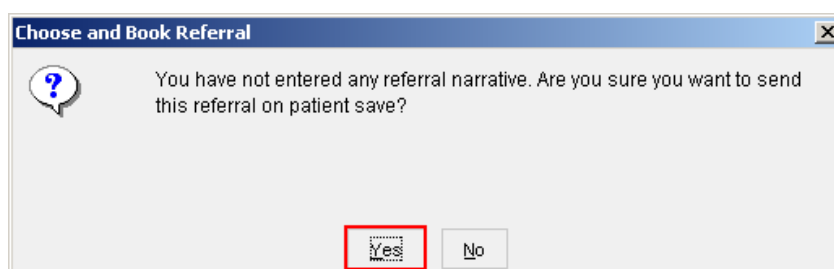
52. The 'Choose and Book Referral' screen is displayed.

a. Click on 'Send Final Version'



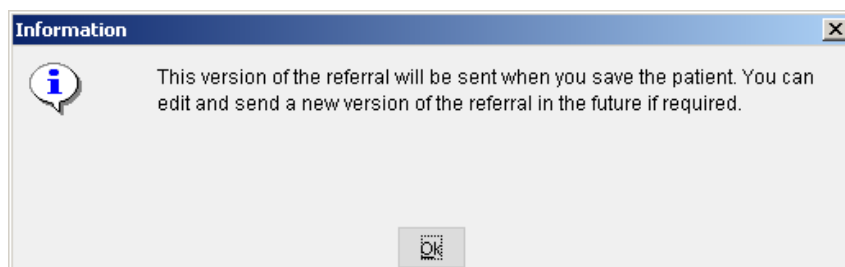
53. The 'Choose and book Referral' dialogue box will be displayed

a. Click on 'Yes'



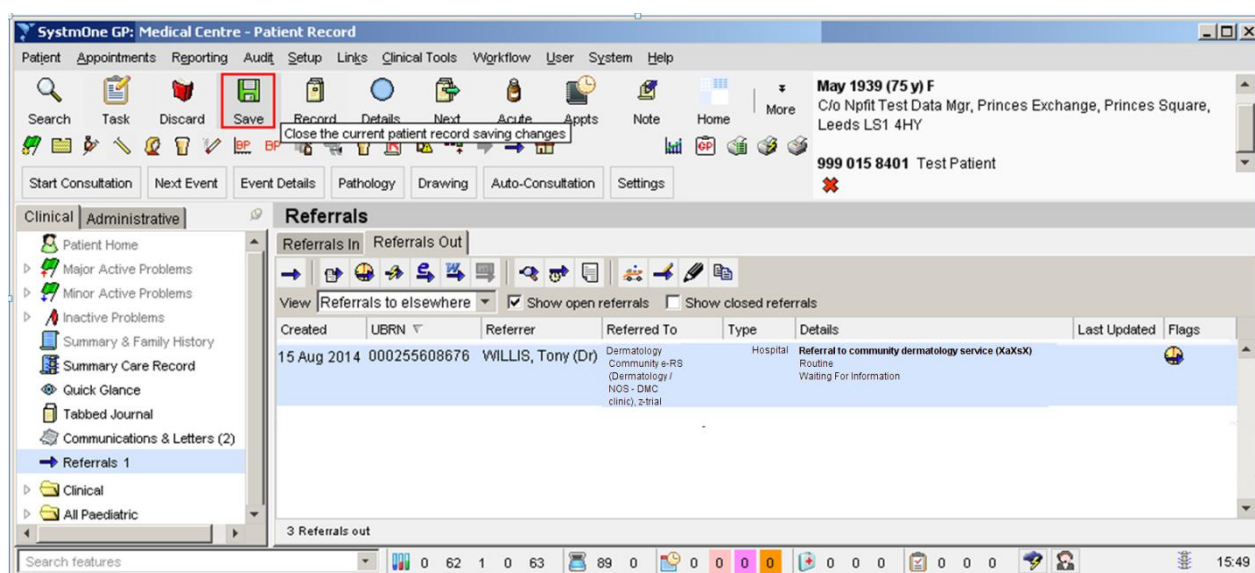
54. The 'information' dialogue box will be displayed

- a. Click on 'OK'



55. The 'Referrals' screen will be displayed in SystmOne

- a. Click on 'Save' to save the patients record and the referral will be sent.



6. Monitoring your e-RS Worklists

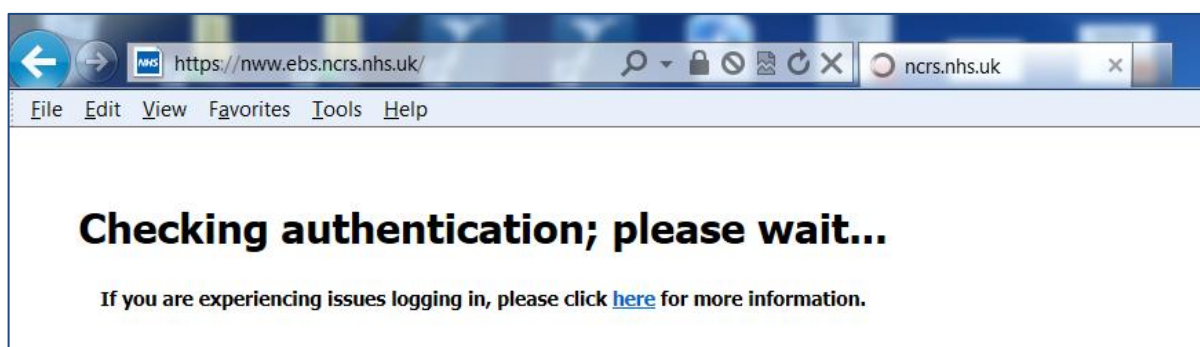
56. Admin Staff will need to monitor the **worklists** on e-RS to ensure any rejected referral are dealt with:

- c. Ensure you have **logged on with your smartcard**

- d. Using **internet explorer**  go to the following website address:

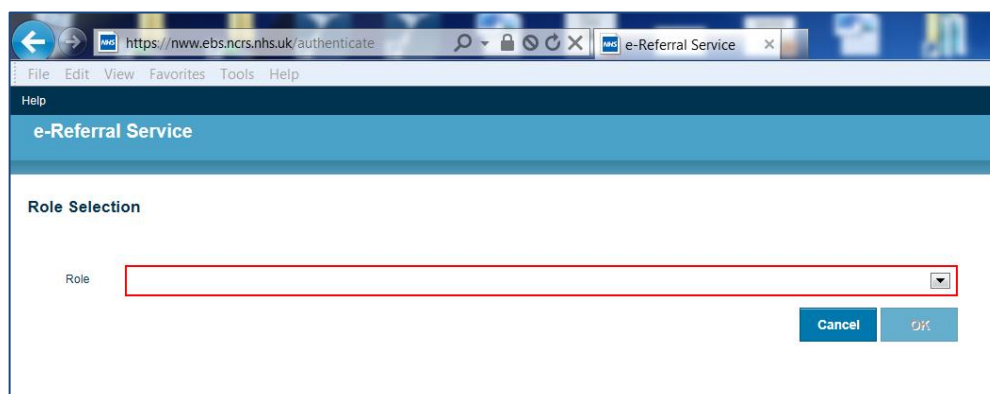
- i. <https://www.ebs.ncrs.nhs.uk/>

- ii. You will see the following screen:

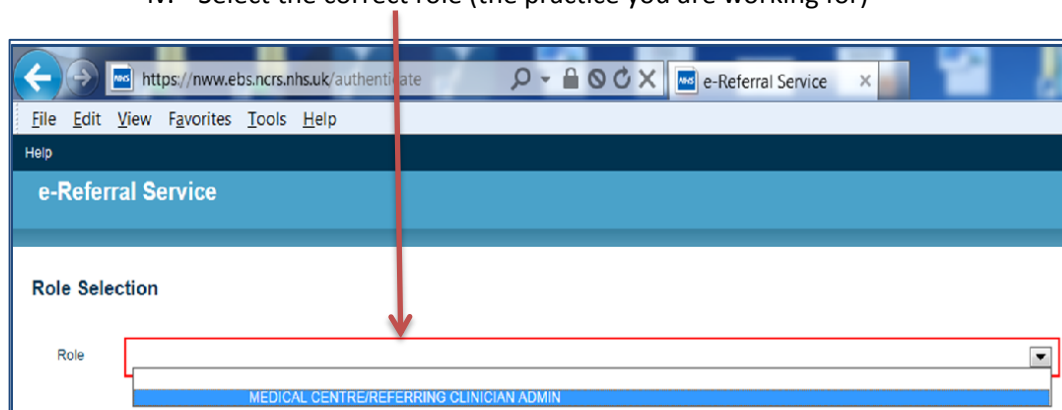


iii. If you have only **one role** on your smartcard please go to **step vi** below.

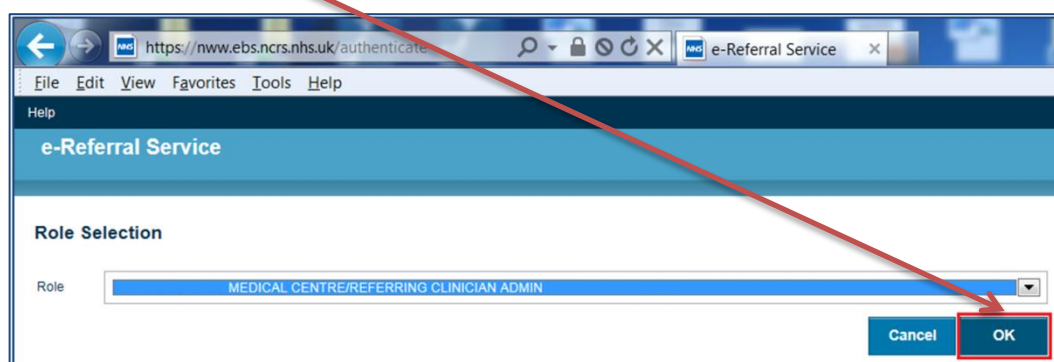
If you have more than one role on your smart card it will ask you to choose the correct site and role. A **role selection** screen will be shown as below:



iv. Select the correct role (the practice you are working for)



v. Click **ok**



vi. The following role selection screen will be shown. See below:

Note: If you do not have multiple roles on your smartcard you will be taken to the e-referral service screen above after logging on to the website <https://nww.ebs.ncrs.nhs.uk/>

Checking Triage Status for Minor Surgery Service (Appropriate Service)

57. Click on the **Worklists** tab

58. Choose the **Awaiting Booking / Acceptance** option from the **Worklist Type** menu.

59. Click on **Refresh** button.

UBRN	Patient Name	Priority	UBRN Created	Clinical Context	Clinician	Appointment	Referral Status	Last Activity
0003 0975 0361	XTESTPATIENTAANL-TESTPATIENT, Ebs-donoduse (Ms)	Routine	27-Jun-2018	Dermatology/Not Otherwise Specified	-	N/A	Awaiting Triage	27-Jun-2018

60. This shows the status of the referral is **Awaiting Triage**.

Checking Triage Status for Minor Surgery Service (Inappropriate service)

61. Click on the **Worklists** tab

62. Choose the **Referrer Action Required** option from the **Worklist Type** menu.

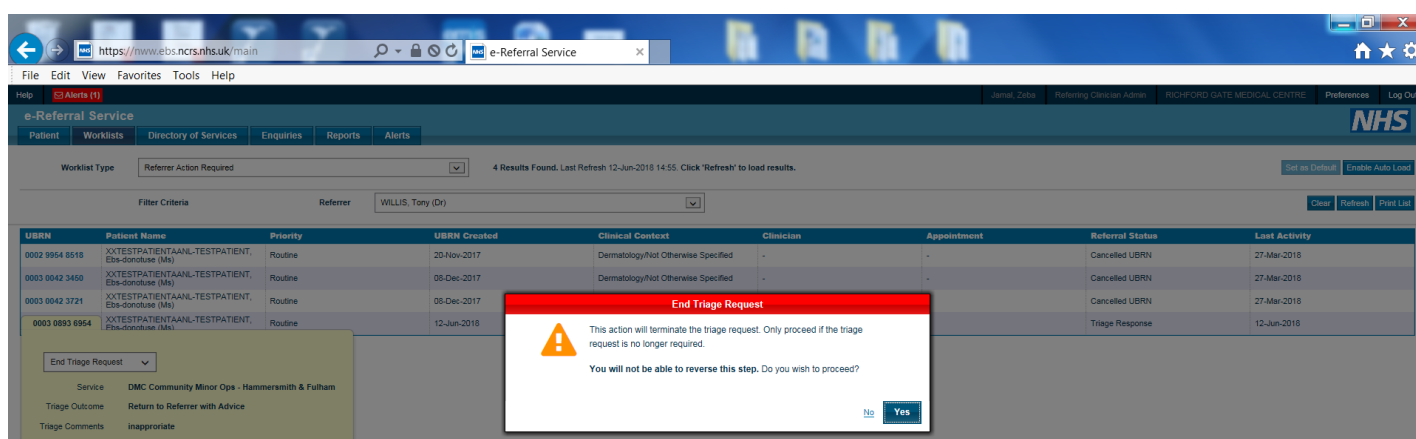
UBRN	Patient Name	Priority	UBRN Created	Clinical Context	Clinician	Appointment	Referral Status	Last Activity
0002 9964 8518	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	20-Nov-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0042 3450	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	08-Dec-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0042 3721	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	08-Dec-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0093 6964	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	12-Jun-2018	Dermatology/Not Otherwise Specified	-	-	Triage Response	12-Jun-2018

63. In the **Referral Status** field check if there is a **Triage Response**

64. Check the **Triage Comments** if the service is inappropriate then click on **end Triage Response**

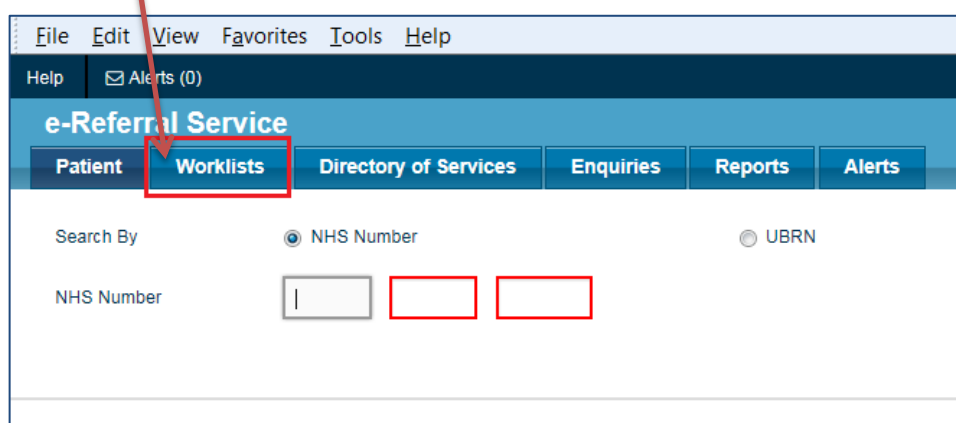
UBRN	Patient Name	Priority	UBRN Created	Clinical Context	Clinician	Appointment	Referral Status	Last Activity
0002 9964 8518	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	20-Nov-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0042 3450	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	08-Dec-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0042 3721	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	08-Dec-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	27-Mar-2018
0003 0093 6964	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	12-Jun-2018	Dermatology/Not Otherwise Specified	-	-	Triage Response	12-Jun-2018

65. Read the Red Dialogue box and Click on **YES** to clear the referral. Otherwise re-book the patient into a more appropriate service.

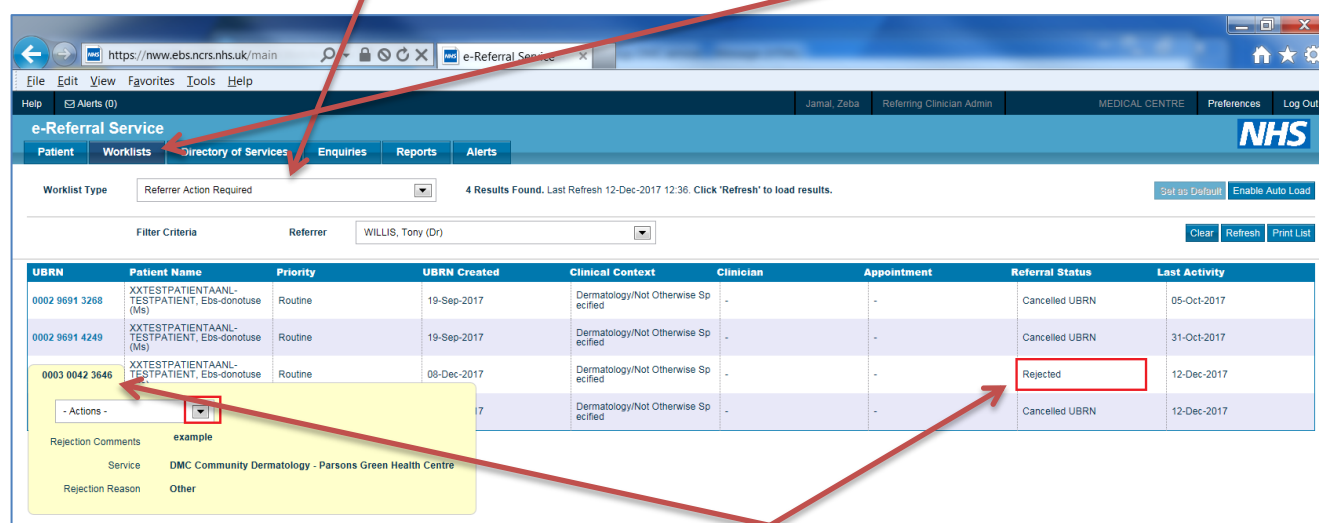


Checking for Rejected Referrals for Dermatology & Minor Surgery -Inappropriate Service

66. Click on the **Worklists** tab



67. Choose the **Referrer Action Required** option from the **Worklist Type** menu.



68. On the **Referral Status** column look for **Rejected** and click on the **UBRN** hyperlink to bring up the **Actions** menu as shown above.

69. Click on the **drop down** Arrow

0003 0042 3646 TESTPATIENT, Ebs-donotuse Routine 08-Dec-2017

- Actions -

Rejection Comments example

Service DMC Community Dermatology - Parsons Green Health Centre

Rejection Reason Other

70. Read the rejection and choose the most appropriate action. You can either **Cancel Request** or choose the **Update/Book** option and pick another service.

Worklist Type: Referrer Action Required 4 Results Found. Last Refresh 12-Dec-2017 12:36. Click 'Refresh' to load results.

Filter Criteria Referrer: WILLIS, Tony (Dr)

UBRN	Patient Name	Priority	UBRN Create	Clinical Context	Clinician	Appointment	Referral Status	Last Activity
0002 9691 3268	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	19-Sep-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	05-Oct-2017
0002 9691 4249	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	19-Sep-2017	Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	31-Oct-2017
0003 0042 3646	XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Ms)	Routine	08-Dec-2017	Dermatology/Not Otherwise Specified	-	-	Rejected	12-Dec-2017
				Dermatology/Not Otherwise Specified	-	-	Cancelled UBRN	12-Dec-2017

Actions -

- Cancel Request
- Update/Book
- View History
- View Request

Checking Outstanding Referrals Letters

71. Click on the **Worklists** tab

File Edit View Favorites Tools Help

Help Alerts (0)

e-Referral Service

Patient Worklists Directory of Services Enquiries Reports Alerts

Search By NHS Number UBRN

NHS Number

72. Choose the **Outstanding Referral Letters** option from the **Worklist Type** menu

UBRN	Patient Name	Priority	UBRN Created	Clinical Context	Clinician	Referrer	Letter Due
0003	Patient X	2 Week Wait	13-Dec-2017	2WW/2WW Lower GI	-	Dr Y	14-Dec-2017
0003	Patient X	2 Week Wait	03-Jan-2018	2WW/2WW Breast	-	Dr X	04-Jan-2018
0003	Patient X	2 Week Wait	05-Apr-2018	2WW/2WW Lower GI	-	Dr Z	06-Apr-2018
0003	Patient X	2 Week Wait	16-May-2018	2WW/2WW Urology	-	Dr X	17-May-2018
0003	Patient X	2 Week Wait	21-May-2018	2WW/2WW Sarcoma	-	Dr Y	22-May-2018
0003	Patient X	Urgent	21-Dec-2017	-	-	Dr X	22-Dec-2017
0003	Patient X	Urgent	10-Jan-2018	Ear, Nose & Throat/Throat (incl Voice / Swallowing)	-	Dr A	11-Jan-2018
0003	Patient X	Urgent	16-Feb-2018	Neurology/Epilepsy	-	Dr X	19-Feb-2018
0003	Patient X	Urgent	05-Mar-2018	Neurology/Epilepsy	-	Dr B	06-Mar-2018
0003	Patient X	Urgent	06-May-2018	Neurology/Epilepsy	-	Dr X	09-May-2018
0003	Patient X	Routine	12-Dec-2017	Diagnosis: Physiological Measurement/Audiology - Hearing Assess / Reassess	-	Dr C	15-Dec-2017
0003	Patient X	Routine	18-Dec-2017	Gynaecology/Antenatal	-	Dr X	21-Dec-2017
0003	Patient X	Routine	16-Jan-2018	Dermatology/Not Otherwise Specified	-	Dr G	19-Jan-2018
0003	Patient X	Routine	28-Feb-2018	Dermatology/Acne	-	Dr X	05-Mar-2018
0002	Patient X	Routine	06-May-2018	Nephrology/Acute Kidney	-	Dr H	11-May-2018
0003	Patient X	Routine	05-Jun-2018	Children's & Adolescent Services/Dermatology	Dr X	Dr X	08-Jun-2018

73. **Letter Due** Date in red means the Letters are overdue and need to be uploaded to the e-RS website

74. **Date in Black** will turn red unless letters are sent within:

- 2 Week Wait – 24 hours
- Routine & Urgent 72 hours

This completes the NHS e-Referral process and also checking the e-RS worklists Community Dermatology and Minor Surgery within SystmOne.

Glossary:

Please review to section on Referrers Responsibility on page 5 on the link below.

http://content.digital.nhs.uk/media/22665/NHS-e-Referral-Service-Best-Practice-Guidance/pdf/NHS_e-Referral_Service_Best_Practice_Guidance.pdf

Disclaimer:

To the best of our knowledge and using the available information these searches are correct at the time of publishing.