

2025

# NHS e-Referrals EMIS Web

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

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## Introduction

This document is intended to act as a reference to enable GP Practices to successfully navigate EMIS Web in order to produce meaningful NHS e-Referrals.

The e-RS is an electronic referral and management system, using Spine information, that can integrate with other systems.

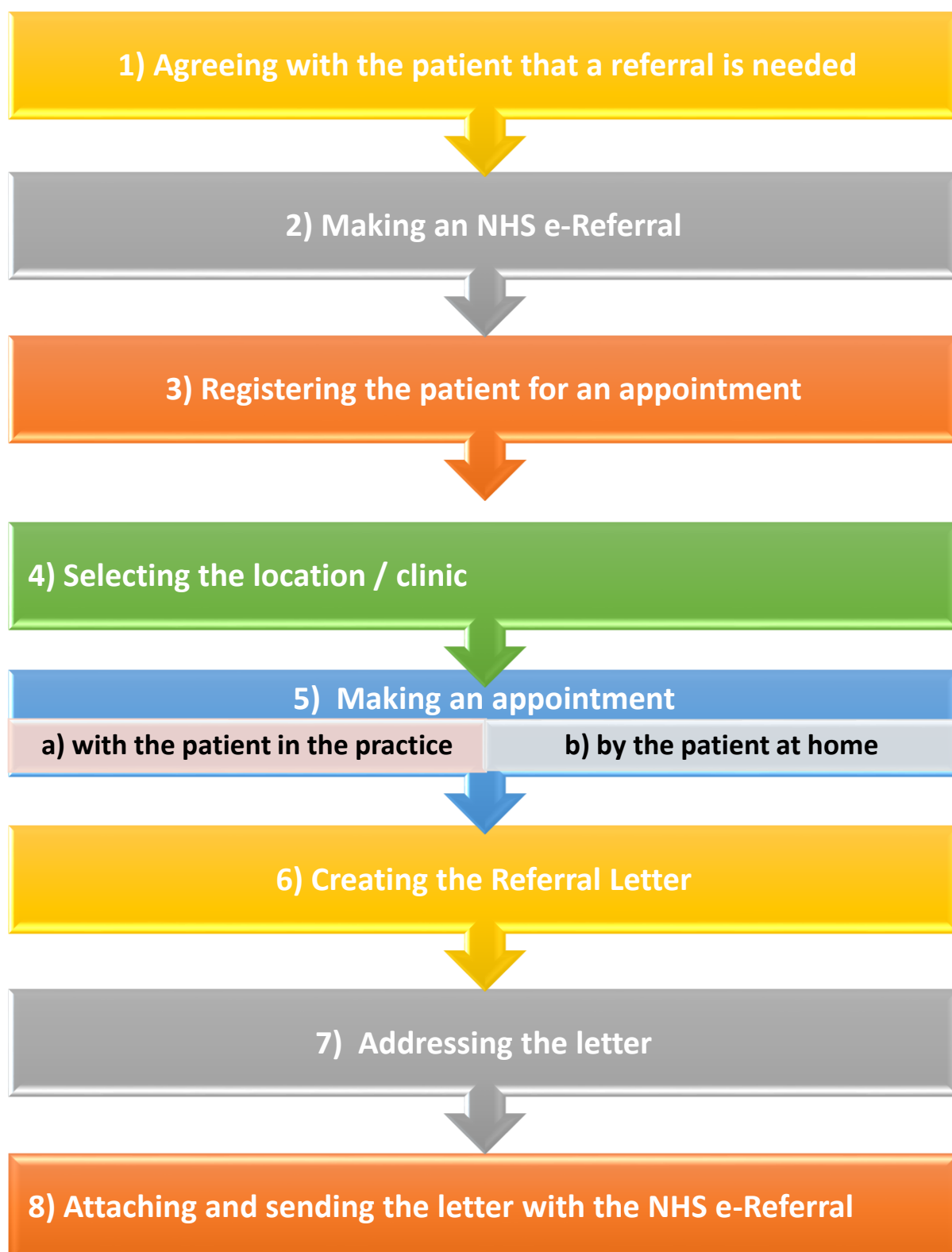
This guidance document provides North West London GP practices with instructions on how to make an NHS e-Referral, create and attach an EMIS Web referral letter.

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 four (3) parts to the making a NHS e-Referral booking:

1. Initiate a NHS e-Referral within EMIS Web
2. Create an EMIS Web Referral Letter
3. Attach an EMIS Web Referral Letter

## Flow Chart for NHS e-Referrals

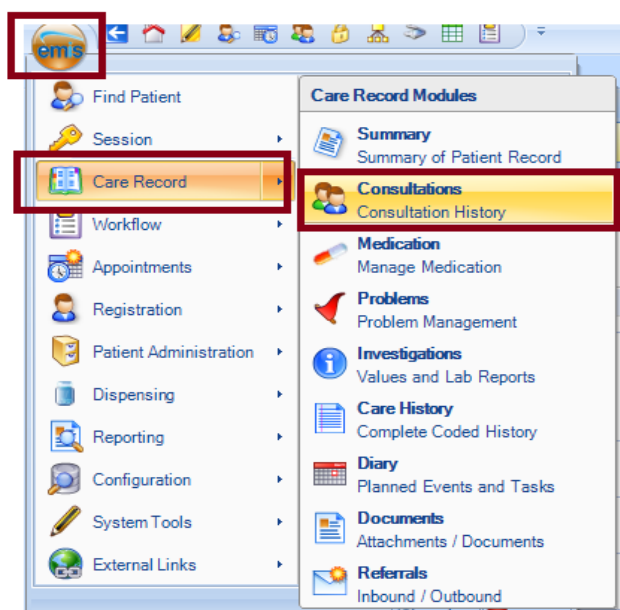


## Section 1: Initiate a NHS e-Referral within EMIS Web

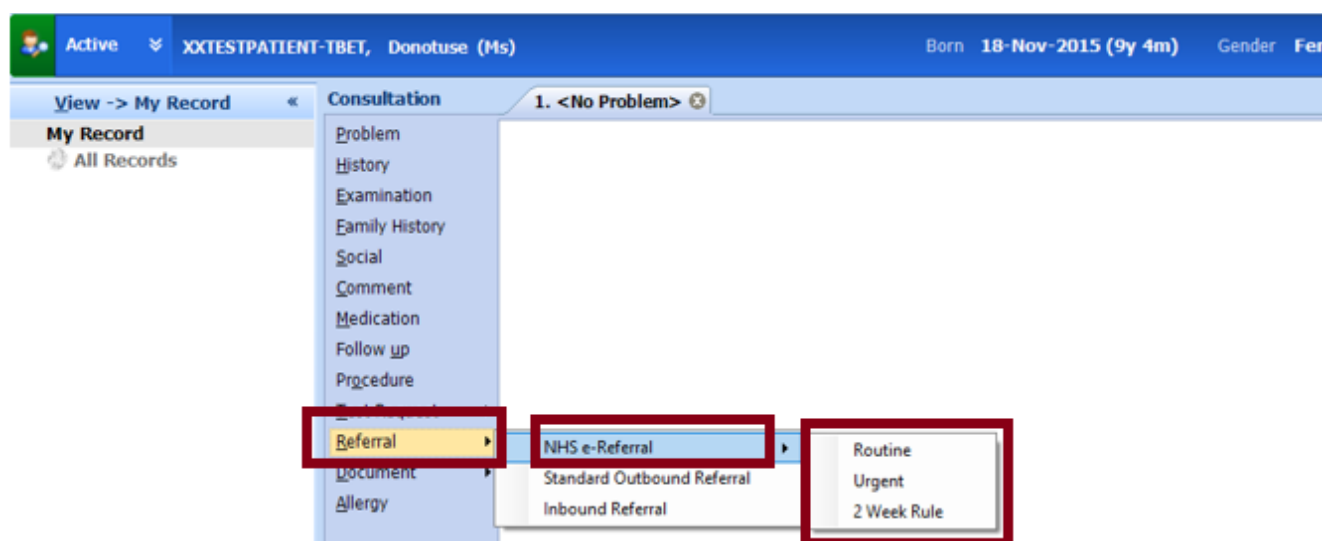
1. Logon on to EMIS Web



2. Open the patient's record and complete their consultation.
3. Check that the patient's demographic details are correct

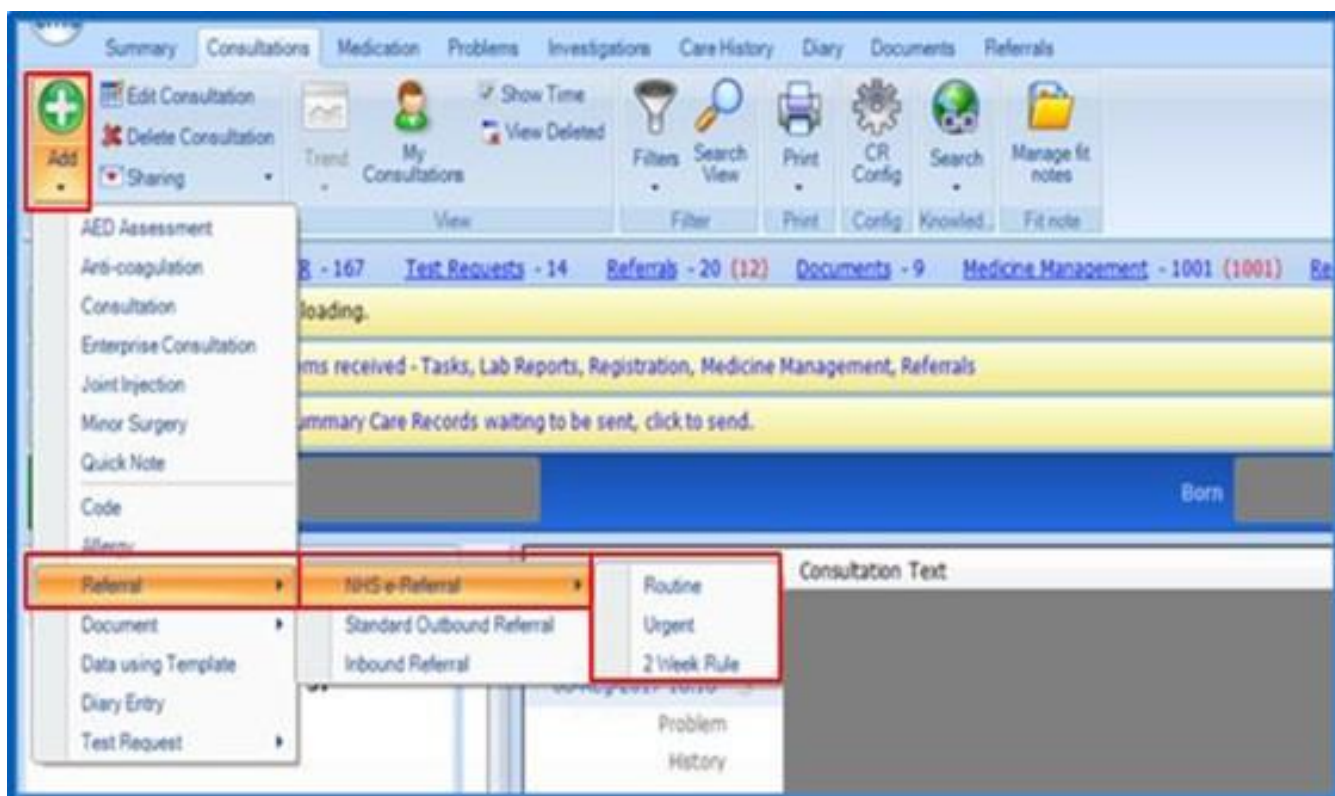


4. Within the open patient record click on '**Referral**' from the consultation tab then choose option '**NHS e-Referral**' from the sub-menu option.
  - a. Set the appropriate referral priority as either **Routine**, **Urgent** or **2-week wait** as shown in the screen shot below

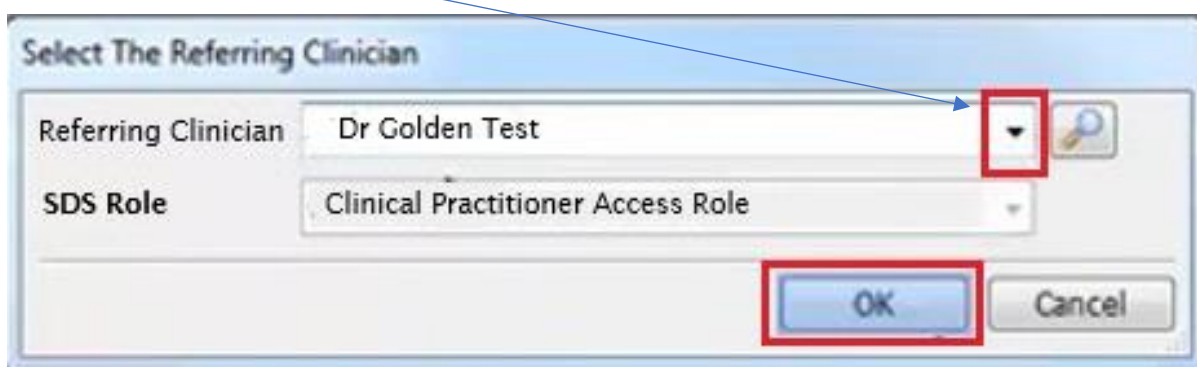


- b. Or you can click on the **Add > Referral > NHS e-Referral** from the sub-menu option. ~Then set the priority as either **Routine, Urgent or 2-week wait** as shown in the screen shot below

**Please note:** If you create a referral from the referrals tab it will not be seen in the consultation. Therefore, the recommendation is to create the referral from a consultation.



5. Select the **Referring Clinician** from the drop down and click on 'OK'



- Microsoft Edge browser will be launched. **Select your login method**

- Select **smartcard** option and click **Continue**
- The '**Search for a service**' screen will be displayed as shown below

9. Populate the 'Referring clinician' field.

### Search for a service

#### Step 1: Confirm request details

**Referring clinician**

▼

On behalf of: MEDICAL CENTRE

10. Choose the appropriate 'Request type' in this case it will be **referral**

**Request type**

☐ Referral

☐ Advice

11. The 'Priority' field should be pre-populated as follows

**Priority**

☒ Routine

☐ Urgent

☐ 2-week wait

12. Using the drop down menus, select the appropriate 'Specialty' and 'Clinic type' (in this example 'Cardiology' and 'Hypertension' are used respectively)

#### Step 2: Select service details

Complete at least 1 field to continue

**Specialty**

▼

**Clinic type**

▼

Arrhythmia  
Cardiology Genetics  
Congenital Heart Disease  
Heart Failure  
Hypertension  
Ischaemic Heart Disease  
Lipid Management  
Not Otherwise Specified  
Rapid Access Chest Pain inc Exercise ECG  
Valve Disorders

13. The 'Search for a service' screen will be populated as shown below. Left click on 'Search' button

**Search for a service**

Step 1: Confirm request details

Referring clinician  
WILLIS, Tony

On behalf of: RICHFORD GATE MEDICAL CENTRE

Request type  
☒ Referral  
☐ Advice

Priority  
☒ Routine  
☐ Urgent  
☐ 2-week wait

Step 2: Select service details

Complete at least 1 field to continue

Specialty  
Cardiology

Clinic type  
Hypertension

Named clinician  
[Search for a clinician](#)

Add more search detail +

**Search** **Reset**

14. The 'Referral service search results' screen will display the results of the search, as shown below:

**Referral service search results**

Select up to 20 services that best meet the needs of your patient.

Select action

Select	Distance :	Service :	Notes for referrer	Appointment wait : time	Average treatment wait : time	CQC rating :
<input type="checkbox"/>	0 miles	<b>Triage</b> HAMMERSMITH HOSPITAL Cardiology/hypertension TRIAGE/Hammersmith/Imperial NHS Trust (RV)	TRIAGE outcomes include patients been seen at any Imperial hospital or local site	N/A	17 weeks	Overall: <a href="#">Requires improvement</a>
<input type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology/Direct access echocardiogram (ECHO) triage clinic/Willesden Diagnostic Centre/Imperial RV	Not recorded	N/A	17 weeks	Overall: No rating available
<input type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology/Direct access holter Triage clinic/Willesden Diagnostic Centre/Imperial NHS Trust (RV)	Not recorded	N/A	17 weeks	Overall: No rating available
<input type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>
<input type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL Hypertension Clinic - Royal Brompton and Harefield Foundation Trust - RT3	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>

15. Select at least **five** (5) services by ticking the Select boxes as shown below At this point the referring GP should have a choice conversation with the patient, if not already done so.

**Please Note:** The choice conversation is explained further in the **Glossary** at the end of this document.

Select	Distance †	Service ‡	Notes for referrer	Appointment wait time †	Average treatment wait time †	CQC rating ‡
<input checked="" type="checkbox"/>	0 miles	<b>Triage</b> HAMMERSMITH HOSPITAL Cardiology(Hypertension Triage)(Hammersmith)Imperial NHS Trust (RV)	TRIAGE outcomes include patients been seen at any Imperial hospital or local site	N/A	17 weeks	Overall: <a href="#">Requires improvement</a>
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology(Direct access echocardiogram(ECHO) triage clinic)(Willesden Diagnostic Centre)Imperial RV	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology(Direct access holter Triage clinic)(Willesden Diagnostic Centre)Imperial NHS Trust(RV)	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL Hypertension - Royal Brompton and Harefield Foundation Trust - RT3	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>
<input type="checkbox"/>	3 miles	<b>Triage</b> CHELSEA & WESTMINSTER HOSPITAL RAS - Cardiology(Chelsea and Westminster Hospital RQM01)	Not recorded	N/A	10 weeks	Overall: <a href="#">Outstanding</a>
<input type="checkbox"/>	4 miles	<b>Face-to-face</b> UNIVERSITY COLLEGE HOSPITAL Blood Pressure and Cardiovascular Risk Clinic - Clinical Pharmacology - UCLH - RRV	Not recorded	Limited availability	16 weeks	Overall: <a href="#">Requires improvement</a>
<input type="checkbox"/>	4 miles	<b>Triage</b> UNIVERSITY COLLEGE HOSPITAL General Cardiology (RAS) - Cardiology Department - UCLH - RRV	This service is not for Diagnostic test Referrals. Please see exclusion for further information.	N/A	16 weeks	Overall: <a href="#">Requires improvement</a>

16. To ensure the referral meets the criteria click on the [hyperlink](#) as shown in the service column.
17. A **Service details** page will open and the referrer can review the **exclusions, conditions treated and suggested investigations**. Use the + symbols to expand each section including **contact information** if you need to contact the service by phone or email.

The screenshot displays the NHS e-Referral Service interface. The main section, 'Service details', lists information for a Cardiology/Hypertension service at Hammersmith Hospital. A red box highlights the 'Contact information' section, which is expanded to show contact details for health professionals and patients. Another red box highlights the 'Conditions treated' section, which is expanded to show a list of conditions. A third red box highlights the 'Exclusions' section, which is expanded to show a list of exclusions. A blue arrow points from the 'Contact information' section to the 'For health professionals' details. Another blue arrow points from the 'Conditions treated' section to the 'Conditions treated' details. A third blue arrow points from the 'Exclusions' section to the 'Exclusions' details.

Service details	
Name	Cardiology Hypertension TRIAGE Hammersmith Imperial NHS Trust  RYJ
Specialty	Cardiology
Service ID	7954231
Clinic type	Hypertension
Service provider organisation	IMPERIAL COLLEGE HEALTHCARE NHS TRUST
Service location	HAMMERSMITH HOSPITAL
Age range treated	16 years and over
Sex treated	Male and female

Contact information	
Service	
Contact name	Patient Service Centre
Address	DU CANE ROAD LONDON GREATER LONDON England W12 0HS

For health professionals	
Telephone number	0203 313 5060
E-mail address	ICHHC-tr.eRS@nhs.net
Textphone number	Not recorded
Fax number	Not recorded

For patients	
Telephone number	0203 313 5000
Hours of operation	8am to 6:30pm Monday - Friday
E-mail address	i.outpatientappointments@nhs.net

Conditions treated	
essential hypertension, secondary hypertension, resistant hypertension, white coat hypertension, hypertension in pregnancy	

Procedures performed	
Investigations as appropriate	

Exclusions	
Pulmonary hypertension (please refer to The National Pulmonary Hypertension Service at Hammersmith Hospital (Dr Luke Howard), Paediatric	

Suggested investigations	

- For instructions on creating a **shortlist-only list**, please see the next page. "**I. Creating a Shortlist option for the patient**". This feature allows the patient to book their own appointment after the clinician has selected a list of appropriate services.
- If you would like to make a '**Face-to-Face**' appointment, please see section "**II. Make a Face-to-Face appointment**" on Page 16. In this type of booking, the clinician will arrange the patient's appointment directly.
- To make a '**Triage**' booking, please refer to section "**III. How to Make a Triage Booking**" Page 19. In this type of scenario, the clinician selects the location for the patient's appointment, and the hospital will triage the patient into the appropriate clinic and offer the patient an appointment directly.

**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.

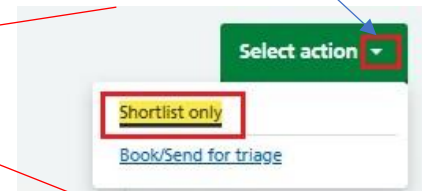
## I. Creating a Shortlist Option for the Patient

21. Patients who will choose their own appointment, click on the **select action** button and choose option **shortlist only** which is located in the top right hand side of the screen

Referral service search results

Select up to 20 services that best meet the needs of your patient.

Select	Distance :	Service :	Notes for referrer	Appointment wait time	Average treatment wait time	CQC rating :
<input checked="" type="checkbox"/>	0 miles	<b>Triage:</b> HAMMERSMITH HOSPITAL Cardiology/Hypertension TRIAGE@HammersmithImperial NHS Trust (RY)	TRIAGE outcomes include patients been seen at any Imperial hospital or local site	N/A	17 weeks	Overall: Requires improvement
<input checked="" type="checkbox"/>	2 miles	<b>Triage:</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology/Direct access echocardiogram(ECHO) triage clinic@Willesden Diagnostic CentreImperial RY	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	2 miles	<b>Triage:</b> WILLESDEN DIAGNOSTIC CENTRE Cardiology/Direct access holter Triage clinic@Willesden Diagnostic CentreImperial NHS Trust(RY)	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face:</b> ROYAL BROMPTON HOSPITAL Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3	Not recorded	Limited availability	20 weeks	Overall: Good
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face:</b> ROYAL BROMPTON HOSPITAL	Not recorded	Limited availability	20 weeks	Overall: Good



22. You will be displayed with the **Review the Services before confirming** screen. Once the choices are shortlisted click on the **Request referral** button at the bottom on the screen

Review the services before confirming

**Important**

The referral has not been created yet. Review the service shortlist to make sure they are suitable for the patient before confirming.

**Service shortlist**

- Face-to-face:**  
UNIVERSITY COLLEGE HOSPITAL  
Blood Pressure and Cardiovascular Risk Clinic - Clinical Pharmacology -  
UCRM - RPY
- Face-to-face:**  
ROYAL BROMPTON HOSPITAL  
Adult General Cardiology Clinic - Royal Brompton and Harefield  
Foundation Trust - RT3
- Face-to-face:**  
ROYAL BROMPTON HOSPITAL  
Hypertension - Royal Brompton and Harefield Foundation Trust - RT3
- Triage:**  
CHELSEA & WESTMINSTER HOSPITAL  
RAS - Cardiology Chelsea and Westminster Hospital RQ401
- Face-to-face:**  
HOMERTON UNIVERSITY HOSPITAL  
Hypertension - Main Outpatients Department - Homerton - RQX

**Add reminder letter**

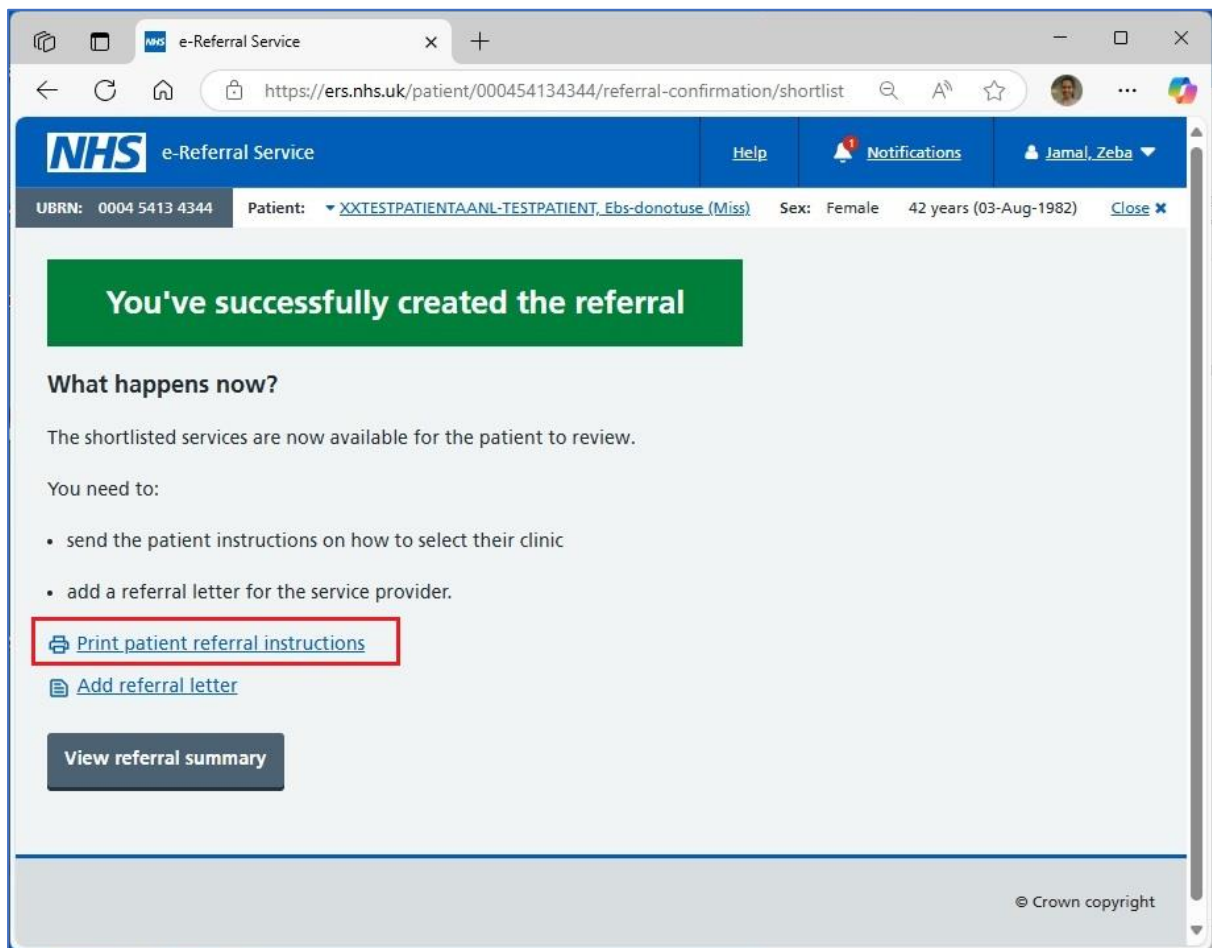
Sent to patient if they have not selected a clinic after 21 days.

Do you want to send the patient a reminder letter?

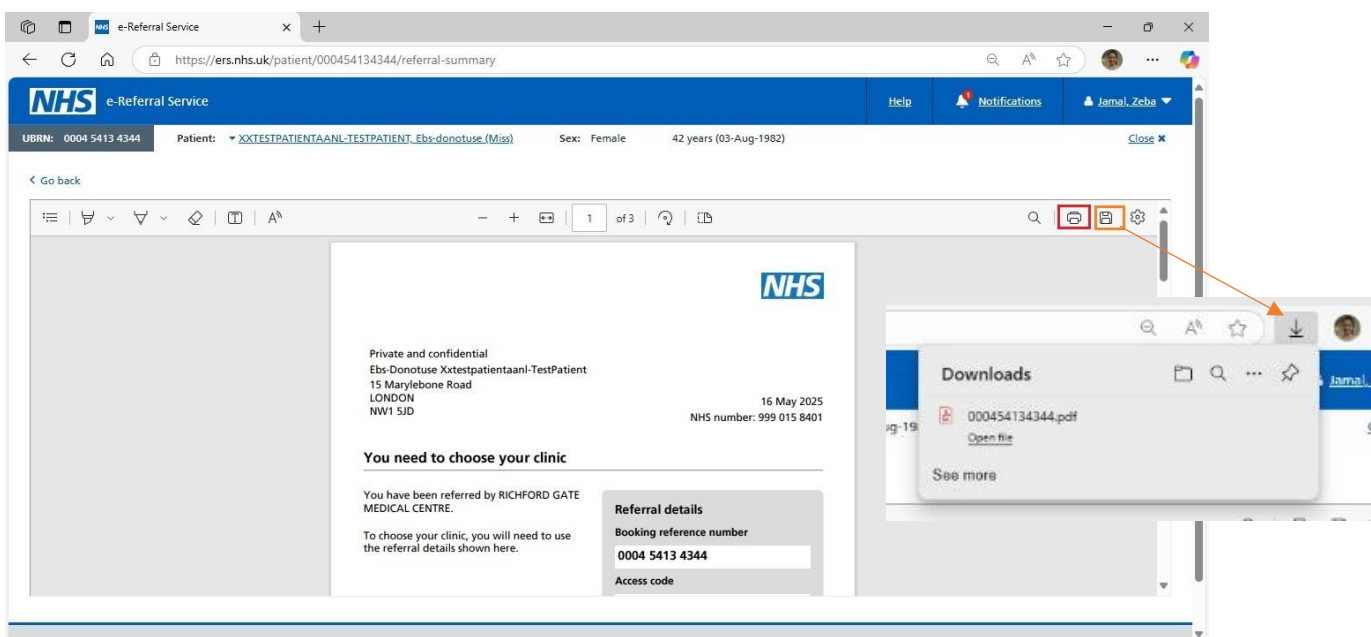
☒ Yes  
☐ No

**Request referral**

23. Click on [Print patient referral instructions](#) to send details to the patient for them to book their own appointment.



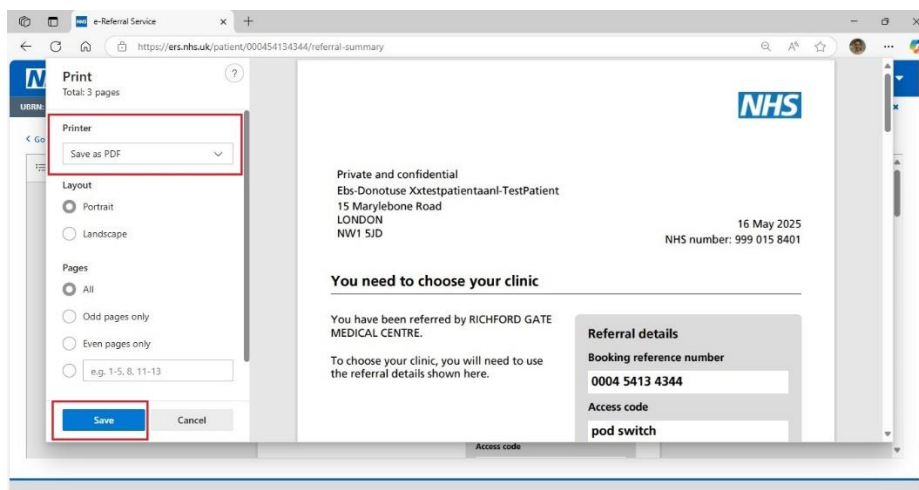
24. If you use the **save** option, the Referral Request Summary details will be downloaded onto the PC and this information can then be sent to the patient.



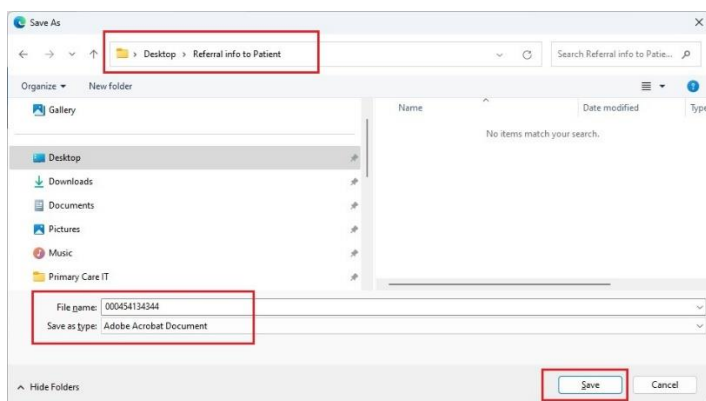
25. If you want to print the Appointment Request Summary to give to the patient for them to go and book their own appointment, then click on the **printer** symbol as shown below:



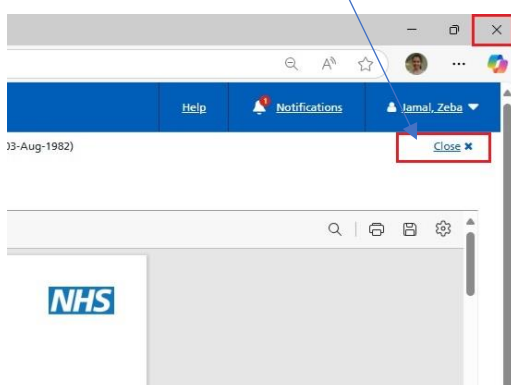
26. A letter is displayed with details for the patient to be able to book their own appointment.



27. Select appropriate printer and **Save**. We have in this example saved to PDF.



28. Click on the **Close X** hyperlink. Then you can close your browser to end the NHS e-Referral part of the process.



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

30. Now go to **Section Two (2) Create an EMIS Web Referral Letter:**

a. To **'Write the Referral Letter Now'** go to point 50 on Page 20

## II. Make a Face-to-Face appointment

31. To make a Face-to-Face appointment click on the **'Select Action'** drop down button on the **Referral service search results screen** and pick the option [Book/Send for triage](#) as shown below:

The screenshot shows the NHS e-Referral Service interface. The top navigation bar includes the NHS logo, 'e-Referral Service', and user information (Jamal Zeba). The patient details are: UBRN: 0004 5397 8096, Patient: XXTESTPATIENTAANL-TESTPATIENT, Ebs-donotuse (Miss), Sex: Female, 42 years (03-Aug-1982).

The main section is titled 'Referral service search results' with the instruction 'Select up to 20 services that best meet the needs of your patient.' Below this is a table of search results.

Select	Distance	Service	Notes for referrer	Appointment wait time	Average treatment wait time	CQC rating
<input checked="" type="checkbox"/>	0 miles	<b>Triage</b> HAMMERSMITH HOSPITAL <a href="#">Cardiology/Hypertension TRIAGE</a>   <a href="#">Hammersmith Imperial NHS Trust RYJ</a>	TRIAGE outcomes include patients been seen at any Imperial hospital or local site	N/A	17 weeks	Overall: <a href="#">Requires improvement</a>
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE <a href="#">Cardiology Direct access echocardiogram(ECHO) triage clinic</a>   <a href="#">Willesden Diagnostic Centre Imperial RYJ</a>	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE <a href="#">Cardiology Direct access holter Triage clinic</a>   <a href="#">Willesden Diagnostic Centre Imperial NHS Trust RYJ</a>	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL <a href="#">Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3</a>	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>

32. You will see the **'Review service options'** Screen as shown below. This will be a list of all the services selected.
33. To review the exclusions, conditions treated and suggested investigations and contact information of the service click on the blue service name [hyperlink](#)
34. To book an appointment click on **select** the appropriate Face to face appointment time.
35. Click on **'Select'** to Choose the appropriate **face-to-face appointment time** from the available options as shown below

The screenshot shows the NHS e-Referral Service interface. At the top, there's a navigation bar with the NHS logo, 'e-Referral Service', and user information (Jamal Zeha). Below this, a patient summary bar shows 'Patient: XXTESTPATIENTAANI-TESTPATIENT\_Ebs-donotuse (Miss)', 'Sex: Female', and '47 years (03-Aug-1982)'. The main content area is titled 'Review service options' and states 'You have a choice of 5 services on the shortlist'. Under 'Option 1 of 5', the service is 'Face-to-face' at 'HAMMERSMITH HOSPITAL', specifically 'Cardiology|Hypertension TRIAGE|Hammersmith|Imperial NHS Trust |RYJ'. Service details include 'Average treatment wait time: 5 weeks' and 'CQC rating: Overall: Outstanding'. The 'Book an appointment' section shows 'Friday 16 May 2025' with a list of times from 09:00 to 11:30, each with a 'Select' button. A 'Load more appointments' link is at the bottom. To the right, a calendar for 'May 2025' is shown, with the 22nd highlighted. A red arrow points from the 'Load more appointments' link to the 22nd of May. Below the calendar, a section for 'Thursday 22 May 2025' shows 'Select an appointment slot.' with a table of times and 'Select' buttons.

36. Ensure the referral meets the criteria by reviewing the exclusions, conditions treated and suggested investigations by clicking on the service name. This will take you to the Service details page (see page 12).

**Please Wait**

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

37. Click on **Book appointment**

**Review appointment before you book**

**Important**

The appointment is not booked yet. Review the appointment details to make sure it is suitable for the patient before booking.

**Appointment details**

Date	Tuesday 20 May 2025
Time	09:40
Service	Cardiology  Hypertension TRIAGE   Hammersmith   Imperial NHS Trust   RYJ
Service type	Face to face appointment
Priority	Routine

**Book appointment**

38. If the patient has a verified email address email the [patient the appointment details](#) by clicking on the hyperlink below. if you need to print out the appointment click on the [Print patient appointment details](#) hyperlink. The patient will at this point have their appointment details on a printout or via email.

39. If you have a large **file greater then 5MB in total to attach**, then you can do this here.

Otherwise There are two (2) options available at this point.

- a. To **'Write the Referral Letter Now'** go to point 50 on Page 20

**You've successfully booked the appointment**

**What happens now?**

You need to:

- send the patient their appointment details
- add a referral letter for the service provider.

**Appointment details**

Date	Tuesday 20 May 2025
Time	09:40
Service	Cardiology  Hypertension TRIAGE   Hammersmith   Imperial NHS Trust   RYJ
Service type	Face to face appointment
Priority	Routine

**Important message from the service**

Please use Outpatient entrance 3 when you arrive at the hospital. Please ensure you arrive at least 15 minutes prior to your appointment. Please be prepared to be at the hospital for up to 2 hours as additional tests may be required

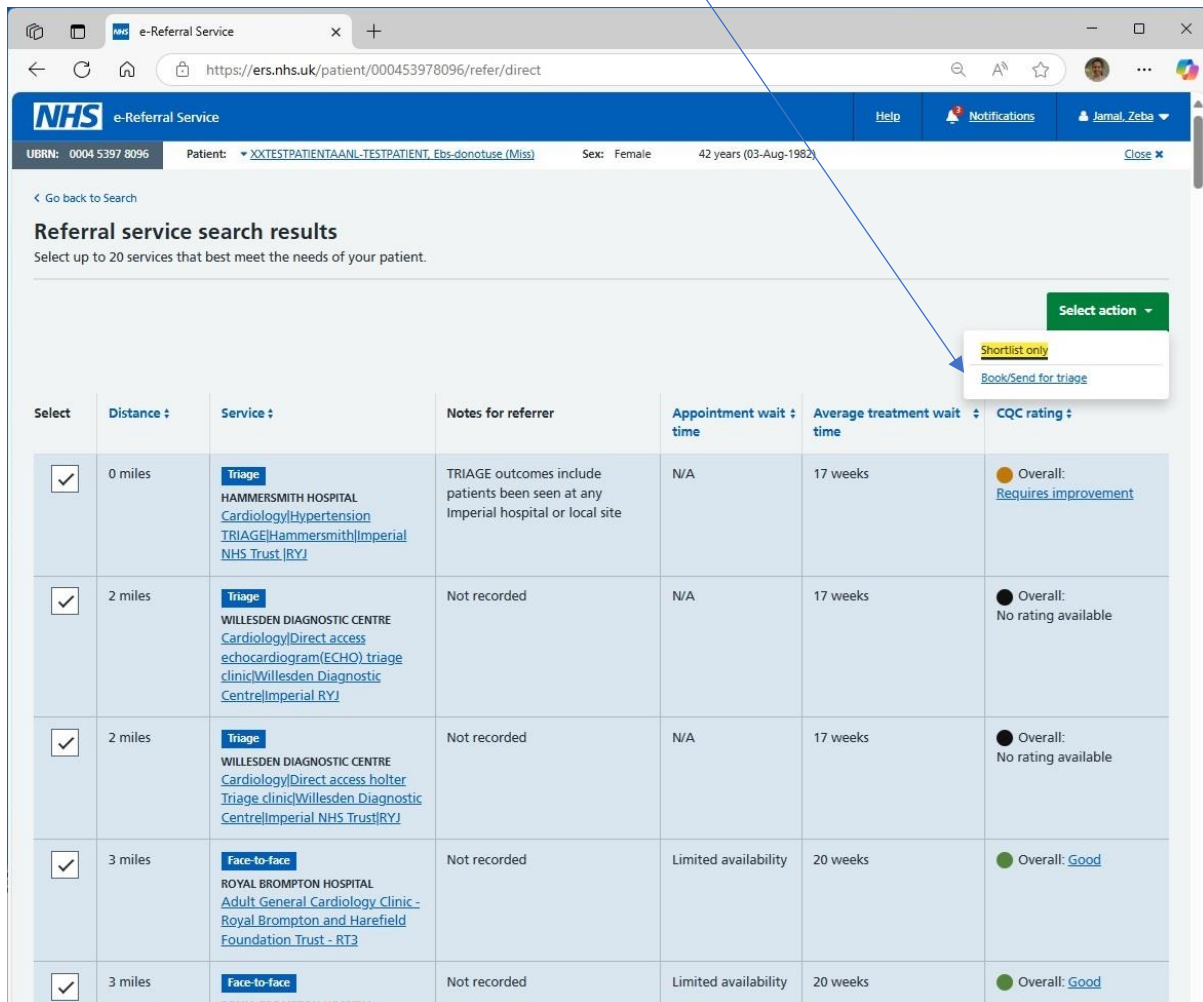
[Email patient appointment details](#)

[Print patient appointment details](#)

[Add referral letter](#)

### III. Make a Triage Appointment

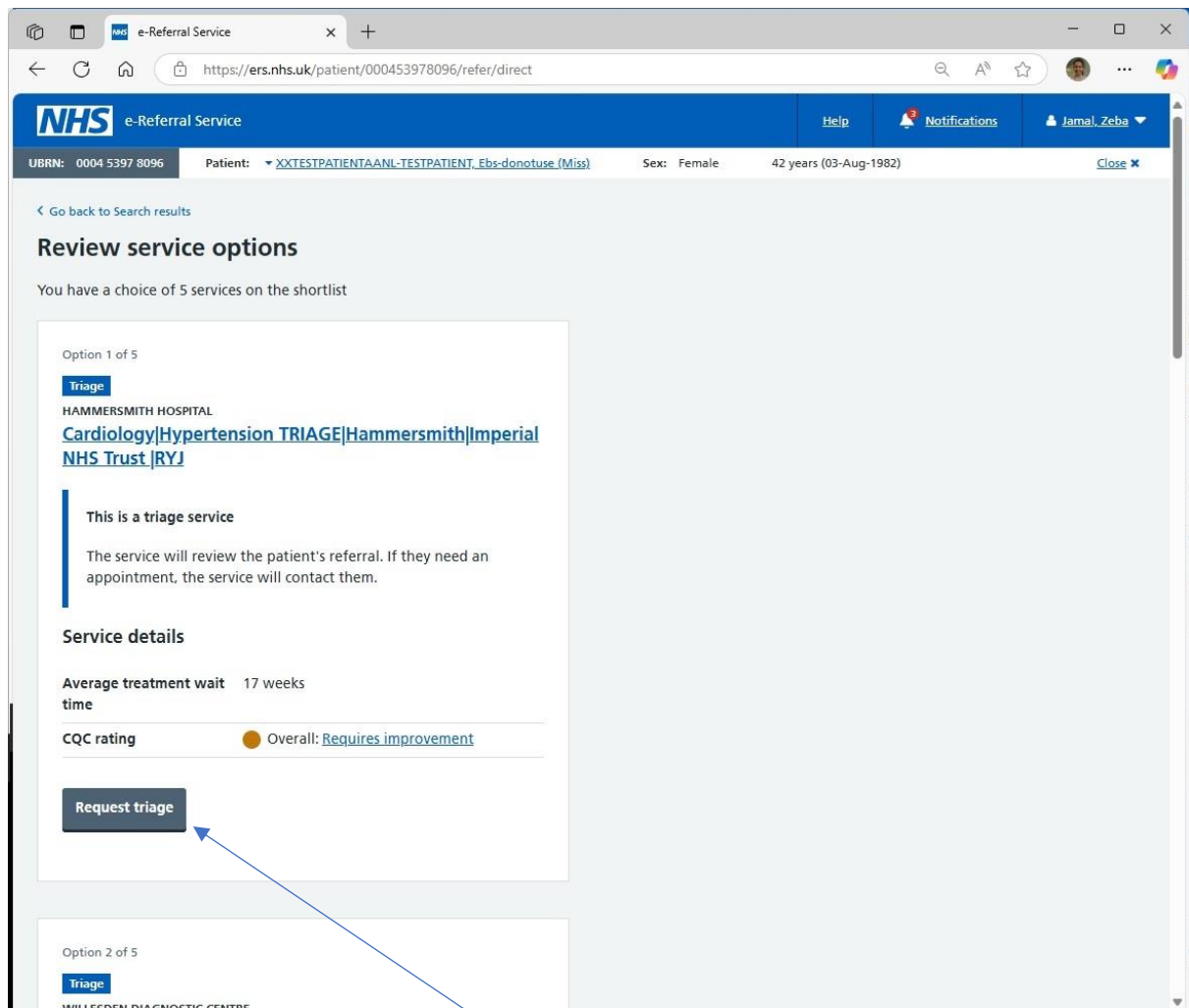
40. To make a triage appointment click on the **'Select Action'** drop down button on the **Referral service search results screen** and pick the option Book/Send for triage as shown below:



The screenshot shows the NHS e-Referral Service interface. The page title is "Referral service search results" with a subtitle "Select up to 20 services that best meet the needs of your patient." Below this is a table of referral services. A dropdown menu labeled "Select action" is open, showing two options: "Shortlist only" and "Book/Send for triage". A blue arrow points from the "Book/Send for triage" option to the "Select action" dropdown menu.

Select	Distance	Service	Notes for referrer	Appointment wait time	Average treatment wait time	CQC rating
<input checked="" type="checkbox"/>	0 miles	<b>Triage</b> HAMMERSMITH HOSPITAL <a href="#">Cardiology/Hypertension TRIAGE</a>   <a href="#">Hammersmith Imperial NHS Trust</a>  RYJ	TRIAGE outcomes include patients been seen at any Imperial hospital or local site	N/A	17 weeks	Overall: <a href="#">Requires improvement</a>
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE <a href="#">Cardiology Direct access echocardiogram(ECHO) triage clinic Willesden Diagnostic Centre Imperial RYJ</a>	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	2 miles	<b>Triage</b> WILLESDEN DIAGNOSTIC CENTRE <a href="#">Cardiology Direct access holter Triage clinic Willesden Diagnostic Centre Imperial NHS Trust RYJ</a>	Not recorded	N/A	17 weeks	Overall: No rating available
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL <a href="#">Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3</a>	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>
<input checked="" type="checkbox"/>	3 miles	<b>Face-to-face</b> ROYAL BROMPTON HOSPITAL	Not recorded	Limited availability	20 weeks	Overall: <a href="#">Good</a>

41. You will see the 'Review service options' Screen as shown below. This will be a list of all the services selected.



42. To make a triage appointment click on **Request Triage** button

43. If the patient has a verified email address [email patient the referral instructions](#) by clicking on the hyperlink below.
44. If you need to print out the appointment click on the [Print patient referral instructions](#) hyperlink. The patient will at this point have their appointment details on a printout or via email.
45. If you have a large **file greater then 5MB in total to attach**, then you can do this here

**You've sent the triage request to the service provider**

**What happens now?**

You need to:

- send the patient referral instructions
- add a referral letter for the service provider.

The patient does not need to do anything at this stage. They will be contacted by the service if they need to be seen and offered an appointment.

If they do not hear from them by 9 July 2025, they may call them on 0203 313 5000 or email them at [i.outpatientappointments@nhs.net](mailto:i.outpatientappointments@nhs.net). Lines are open 8am to 6:30pm Monday - Friday.

**Service details**

Service	<a href="#">Cardiology Hypertension TRIAGE Hammersmith Imperial NHS Trust  RY </a>
Service type	This is a triage service
Location	HAMMERSMITH HOSPITAL
Priority	Routine

[Email patient referral instructions](#)  
[Print patient referral instructions](#)  
[Add referral letter](#)

[View referral summary](#)

46. Complete the referral process on e-RS by changing the option from the dropdown list at the bottom of the browser screen from **Please select an action**

Release Info

Referral UBRN : 000303996777

[User/Team](#) [Retry](#) [Defer](#) [Please select an action:](#) [OK](#)

47. Change option to **I have selected a service**

Referral UBRN : 000303994384

[User/Team](#) [Retry](#) [Defer](#) [I have selected a service](#) [OK](#)

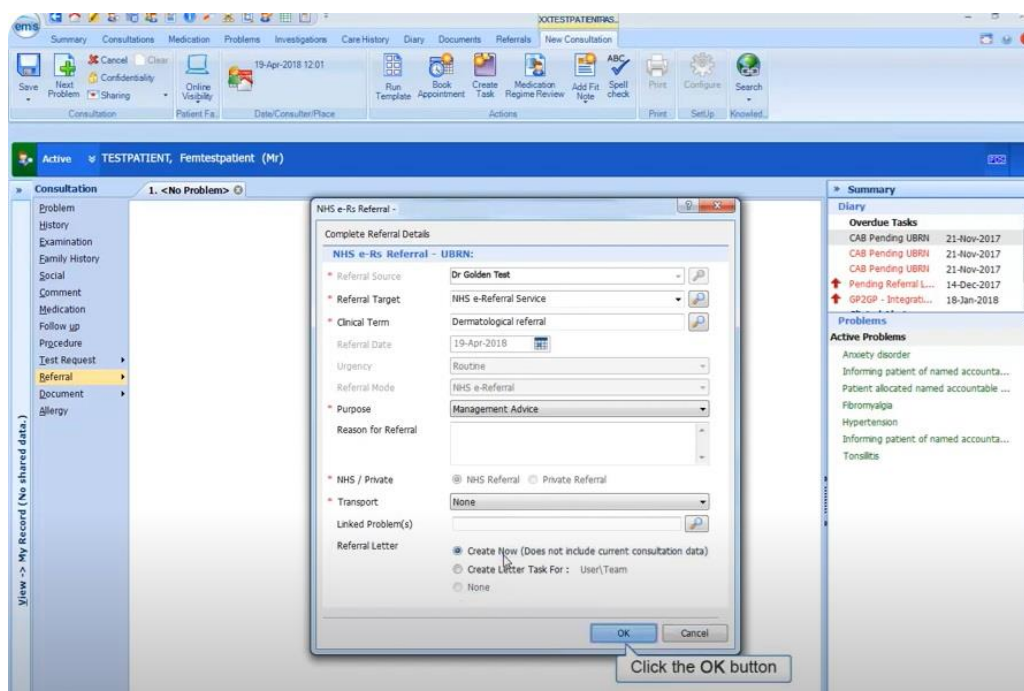
48. Once you have selected your action click **OK**.
49. To **'Write the Referral Letter Now'** go to Next section.

## Section 2: Create a EMIS Web Referral Letter

Once you have booked the appointment for the patient or generated an appointment request you will need to provide clinical referral information such as referral letter, test results etc. to be included along with the e-RS referral for the consultant at the provider end.

### I. Option 1 - Write the Referral Letter now.

50. The appointment booking process has completed. The **NHS e-Rs Referral** EMIS Web popup screen appears.



51. Fill out the **Complete Referral Details** box as shown below and click **ok**:

NHS e-Rs Referral

Complete Referral Details

NHS e-Rs Referral - UBRN:

Referral Source

Dr Golden Test

Referral Target

NHS e-Referral Service

Clinical Term

Cardiological referral

Referral Date

22-Sep-2025

Urgency

Routine

Referral Mode

NHS e-Referral

Purpose

Management Advice

Reason for Referral

NHS / Private

☒ NHS Referral
 ☐ Private Referral

Transport

None

Linked Problem(s)

Referral Letter

☒ Create Now (Does not include current consultation data)
 ☐ Create Letter Task For : User\Team :
 ☐ None

OK

Cancel

- Any field with a \* red asterisk is mandatory
- The **Referral Source** is the details of the **referring clinician**. This field cannot be modified and is therefore greyed out.

NHS e-Rs Referral - Complete Referral Details

NHS e-Rs Referral - UBRN:

\* Referral Source Dr Golden Test

- The **Referral Target** will be **NHS e-Referral Service**.

\* Referral Target NHS e-Referral service

- The **Clinical Term** is the referral speciality. If it has not been pre-selected, click the **magnifying glass** (highlighted in red below) to search for the speciality code. The example below shows the code picker box will launch when you click on the Magnifying glass icon. The user will then need to type in the **Search** file the name of the **speciality** followed by **referral**. In this case **car ref** (cardiological referral). Once you have selected the code you want, the referral code will display at the bottom left corner, **selected code**. Then click **ok**.

\* Clinical Term

Code Selector

Search car ref

Filter Referrals

60 search results

A	Cardiological referral	QOF
B	Cardiology referral	EMIS code
C	Cardiothoracic surgery referral	EMIS code
D	Private referral cardiothoracic surgeon	
E	Private referral to cardiologist	QOF
F	Refer back to secondary care	EMIS code
G	Refer for terminal care	QOF
H	Refer to health care assistant	EMIS code
I	Refer to member of Primary Health Care Team	
J	Refer to terminal care consult	QOF
K	Referral by remote virtual care pulse oximetry monitoring service	
L	Referral by social services department care manager	
M	Referral for ambulatory care	

Selected code

Cardiological referral QOF

Options OK Cancel

- The **Referral Date** is the date of referral and cannot be modified
- The **Urgency** is the urgency you previously selected when creating the referral itself (2WW, Urgent or Routine) and this field is un-editable.
- The **referral mode** will state as **NHS e-Referral** and this field is un-editable.
- The **Purpose** field has a dropdown box when the user will need to select an appropriate option.
- Reason for Referral**, the user can fill this out if required this is a free text field.
- NHS/Private** field option will always be **NHS Referral** by default

- k. **Transport** will default to **none**. If required click the drop down to select the patient's transport needs.
- l. **Linked Problem(s)** - If required click the magnifying glass to select the required clinical problem(s). The screen shot below shows the **Select Problems** Screen when the magnifying glass icon is clicked for linked problems. Once you have ticked the appropriate problems click on **ok**, otherwise click **cancel** to take you back to the previous screen.

Linked Problem(s)

Select Problems

Search View

☐ Show Latest

<input type="checkbox"/> Problem	Onset Date
<b>Active Problems</b>	
<input type="checkbox"/> Heart failure testing NK	01-May-2018
<input type="checkbox"/> Type 2 diabetes mellitus	10-Aug-2017
<input type="checkbox"/> Type 2 diabetes mellitus	10-Aug-2017
<input type="checkbox"/> Interferon gamma assay positive	22-Jun-2016
<input type="checkbox"/> Nut allergy	17-Jun-2016
<input type="checkbox"/> Refer to physiotherapist	21-Apr-2007
<b>Significant Past Problems</b>	
<input type="checkbox"/> Interferon gamma assay positive (Replaced Interferon gamma assay negative)	22-Jun-2016
<input type="checkbox"/> Inactive tuberculosis	22-Jun-2016
<input type="checkbox"/> Tuberculosis	22-Jun-2016
<input type="checkbox"/> Patient health questionnaire (PHQ-9) score	30-Dec-2005
<b>Minor Past Problems</b>	
<input type="checkbox"/> A&E attendance	02-Feb-2020
<input type="checkbox"/> MED3 issued to patient Erythroped A Tablets 500 mg 1 qds 28	28-Jun-2007

OK

Cancel

52. At the bottom of the **NHS e-RS Referral** screen, you're presented with 2 options and you have to decide how the referral letter will be created

Referral Letter

☒ Create Now (Does not include current consultation data)
   
☐ Create Letter Task For : User\Team :
   
☐ None

OK

Cancel

## II. Create Letter Now

53. Select **Create Now** option if you want to create the referral letter or attach the referral letter, if you have already created it prior to the e-RS referral being added.
54. To create a Letter Task for Later, the user will select this option if the referral letter is to be written at another time. This will send a task through to yourself or another member of your team/user. To create the letter in future you will need to pick up the task within the Pending Letter inbox of Referral Management. When you have made the appropriate selection, in this case we will use **Create Now** option then click on **OK**.
55. The **Generate NHS e-Referral Letter** popup box will appear. This will allow the user to create an integrated referral letter, link clinical content and attach documents to the referral.

56. By using the Generate NHS e-RS Referral Letter application, it will automatically include the content below:

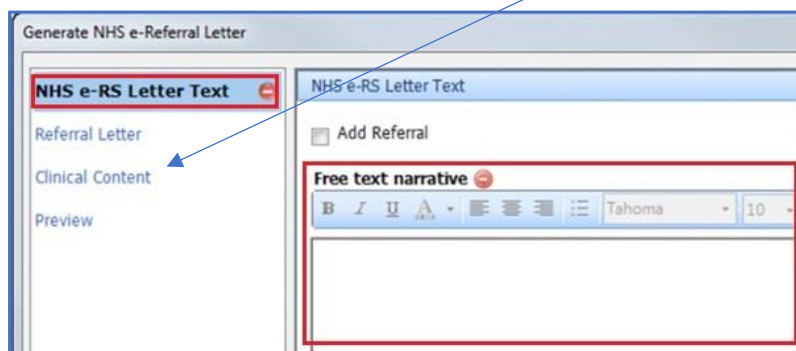
Clinical content	Automatically populated content
Risk to others	All risk to others
Medication	All current medication as well as past medication ended within the last six months (displayed by last issue date).
Problems	All active problems
Allergies	All allergies and intolerances
Investigations And Values	The latest blood pressure reading
Alcohol Consumption	The latest value
Smoking	The latest value
Non-Therapeutic Drug Use	The latest value

57. Any content automatically included, can be de-selected within the Clinical Content screen.

58. In EMIS web there are three different ways the referral letter could be created and linked to its referral:

### III. New referral letter via EMIS template

59. If using the **NHS e-RS Letter Text** screen the user can include the referral letter text. There will be certain clinical details already linked to the referral. Additionally information can also be linked via the **Clinical Content** screen



### IV. New referral letter via practice template

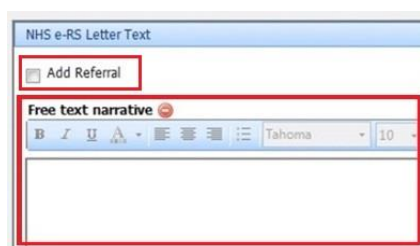
60. Using the **Referral Letter** screen, you can select and complete a referral document template. Additionally, more information is linked via the **Clinical Content** screen as well.

### V. Generating a letter using the EMIS template

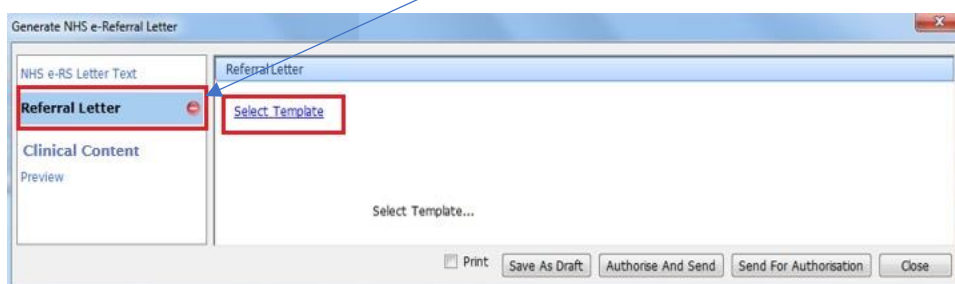
61. EMIS Web also has an in-built referral letter that can also be used specifically for e-RS referrals. To use this on the **NHS e-RS Letter Text** screen, you would **ignore the Add Referral tick box** and include the referral letter text within the **Free text narrative** section.

### VI. Generating a letter using a practice template

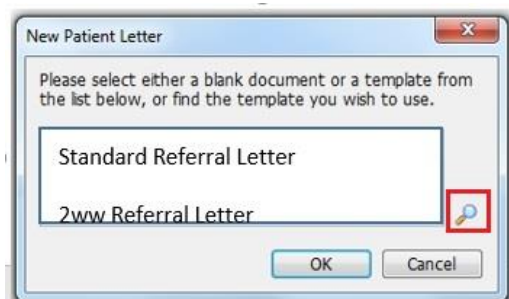
62. If you have a practice-created referral letter or a hospital/service pro forma to complete, you can tick the **Add Referral** tick box on the NHS e-RS Letter Text screen.



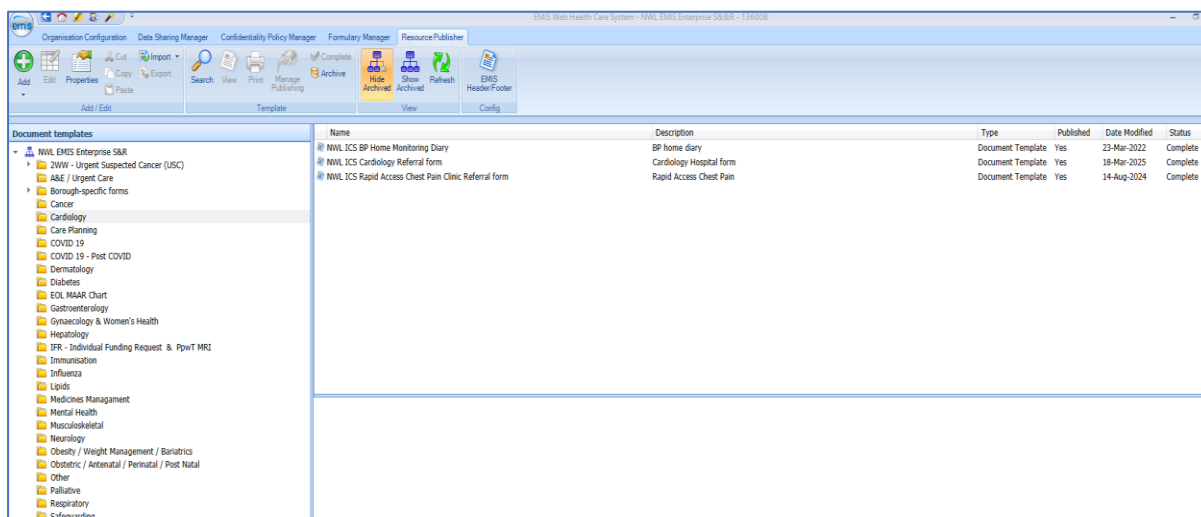
63. Following this, if you select the **Referral Letter** screen and click the **Select Template** link, you can search, select and complete the relevant template.



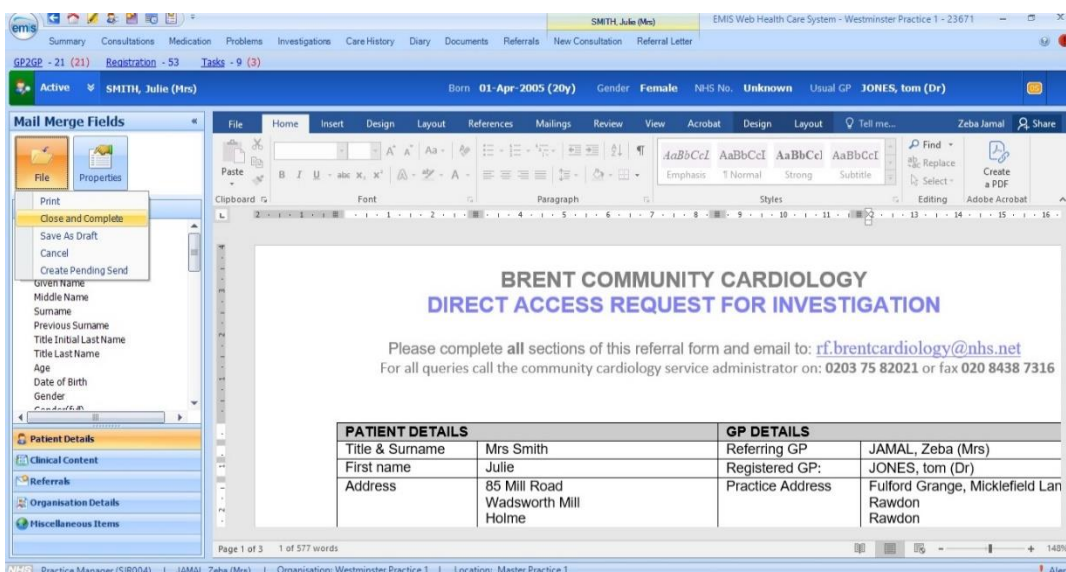
64. A new Patient Letter pop up box appears. If your template is listed, highlight the letter template name and click **ok** .Otherwise click on the magnifying glass icon to look for your letter template.



65. In Northwest London, we have folders named after the priority such as **2WW – Urgent Suspected Cancer (USC)**, the three boroughs Brent, Harrow and Hillingdon (**Borough-Specific forms**) or using the e-RS speciality where the user can find their relevant clinical letter template. In the example below we will navigate to the Cardiology folder and pick the **NWL ICS Cardiology Referral form**



66. Edit you letter and save



## VII. Attach an existing referral letter

67. If a referral letter has been created outside of the Generate NHS e-RS Referral Letter application, you can still link the letter to the e-RS referral. To do this on the **NHS e-RS Letter Text** screen, **ignore the Add Referral tick box** but include the text **See referral letter** within the Free text narrative section. Following this, if you select the Clinical Content screen within the **Attachments** area, you can tick the appropriate referral letter.

## VIII. Letter review and attaching clinical content

68. To then review and amend the clinical content linked to the e-RS referral, click on the **Clinical Content** screen:

The screenshot shows the 'Generate NHS e-Referral Letter' application. The left sidebar contains the following menu items: 'NHS e-RS Letter Text', 'Referral Letter', 'Clinical Content' (highlighted with a red box), 'Preview', 'Investigations And Val...', 'Family History', 'Alcohol Consumption', 'Smoking', 'Non-Therapeutic Drug Use', 'Housing', 'Employment', and 'Attachments' (highlighted with a red box). The main area is titled 'Clinical Content' and shows a table of selected items. The table has columns for 'Date', 'Term', and 'Value'. The first row is selected with a checkbox.

Date	Term	Value
<input checked="" type="checkbox"/> 08-Jun-2016	O/E - blood pressure reading	120/76 mmHg
<input type="checkbox"/> 07-Dec-2015	Alcohol consumption	16 U/week
<input type="checkbox"/> 07-Dec-2015	Body mass index	38.5 kg/m2
<input type="checkbox"/> 07-Dec-2015	O/E - height	130 cm
<input type="checkbox"/> 07-Dec-2015	O/E - weight	65 kg
<input type="checkbox"/> 03-Dec-2015	Diagnostic procedures	
<input type="checkbox"/> 02-Aug-1999	Birth head circumference	35.5 cm
<input type="checkbox"/> 02-Aug-1999	Birthweight of baby	3920 Kg Pale - prob mildly anaemic. Pale and unwell

## IX. Clinical Content screen

69. In the **Attachments** area you are able to include additional documents to the referral. When adding attachments to e-RS referrals, there are warning messages displayed if any of the following applies:
- Total attachments selected has exceed 5MB.
  - You have selected an invalid file extension.
  - There is an invalid character in the file name.

70. Before sending the referral letter onto e-RS, you can preview the letter within the **Preview** screen.

71. After completing the **Generate NHS e-Referral Letter** application, if there are any missing fields an icon similar to a **No entry** symbol is displayed on the relevant screens. You will need to complete these screens properly before the user can proceed.

## X. Authorising and sending letter

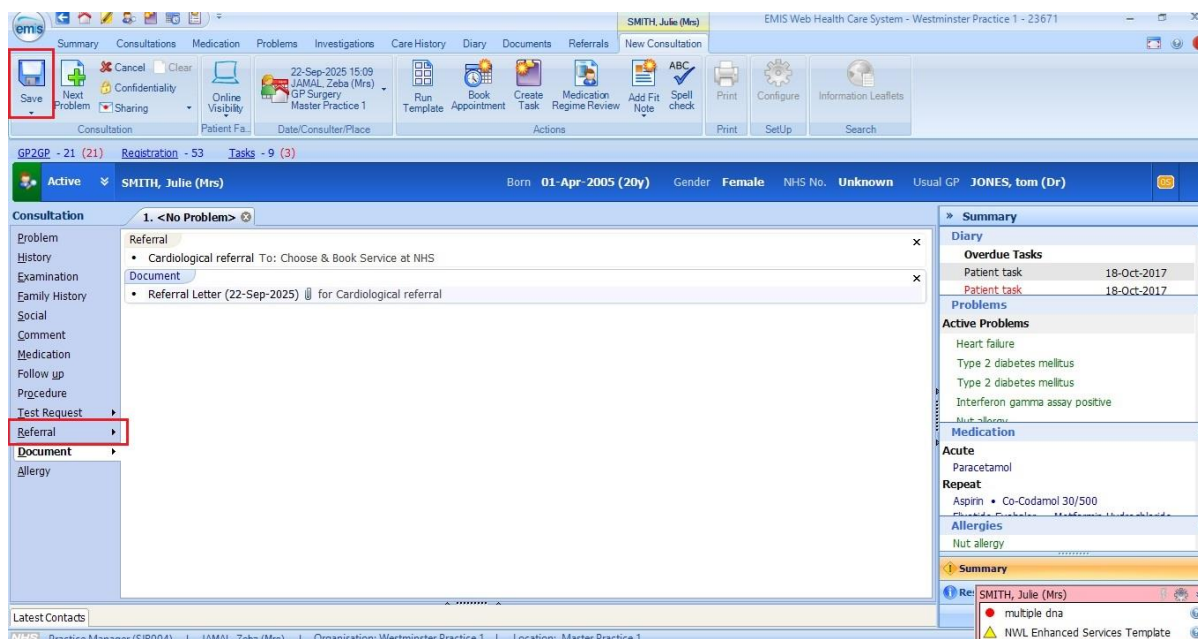
72. When you need to pause writing the letter or sending it to the e-Referral Service, you can choose an option at the bottom of the page:

Option	Description
<b>Print</b>	This will print a copy of the referral letter. If you select <b>Save as Draft</b> , a Draft copy is printed in the background of the letter.
<b>Save as Draft</b>	This saves the letter without sending it. A <b>Pending Letter</b> task is then created in <b>Referral Management</b> area.
<b>Authorise and Send</b>	It will send the referral letter to e-RS.
<b>Send for Authorisation</b>	This will send the referral letter to the originating clinician for authorisation before sending to e-RS. An <b>Awaiting Authorisation</b> task will be generated in Referral Management area.
<b>Close</b>	This action will close the referral letter without saving or sending it.

73. The ability to send referral letters is only available to users with RBAC activities **B1101** or **B1102** in their role profile. Users with B1102 in their role profile also need RBAC activity **B0143** Verify Clinical Documents. The ability to send referral letters for authorisation is only available to users with RBAC activities B1102 or B1103 in their role profile.

74. Click on **Authorise and send** once you want to complete the referral.

75. Click the 'Save' button located on the top ribbon to save the patient's record. Once saved, the referral will be automatically submitted.



This action completes the NHS e-Referral process within EMIS Web.

## Glossary

### a. Number of choices

*We're asking all referrers to ensure they shortlist on average 5 choices from which the patient may choose, where this is practicable, clinically appropriate and preferred by the patient.*

*Please review to section on Referrers Responsibility on Website link below (point 3)*

[NHS Choice Framework - what choices are available to you in your NHS care - GOV.UK \(www.gov.uk\)](https://www.gov.uk/nhs-choice-framework)

### b. Referrer responsibilities

[Best practice guidelines for referrers - NHS e-Referral Service - NHS England Digital](#)

## Disclaimer

*To the best of our knowledge and using the available information, this guidance is correct at the time of publishing.*

Please do **not hesitate** to contact us if you have any queries via the NWL ICB IT Service Desk:

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