NHS e-Referrals
EMIS Web

USER GUIDE
PRIMARY CARE SYSTEMS TRAINING TEAM

Contents

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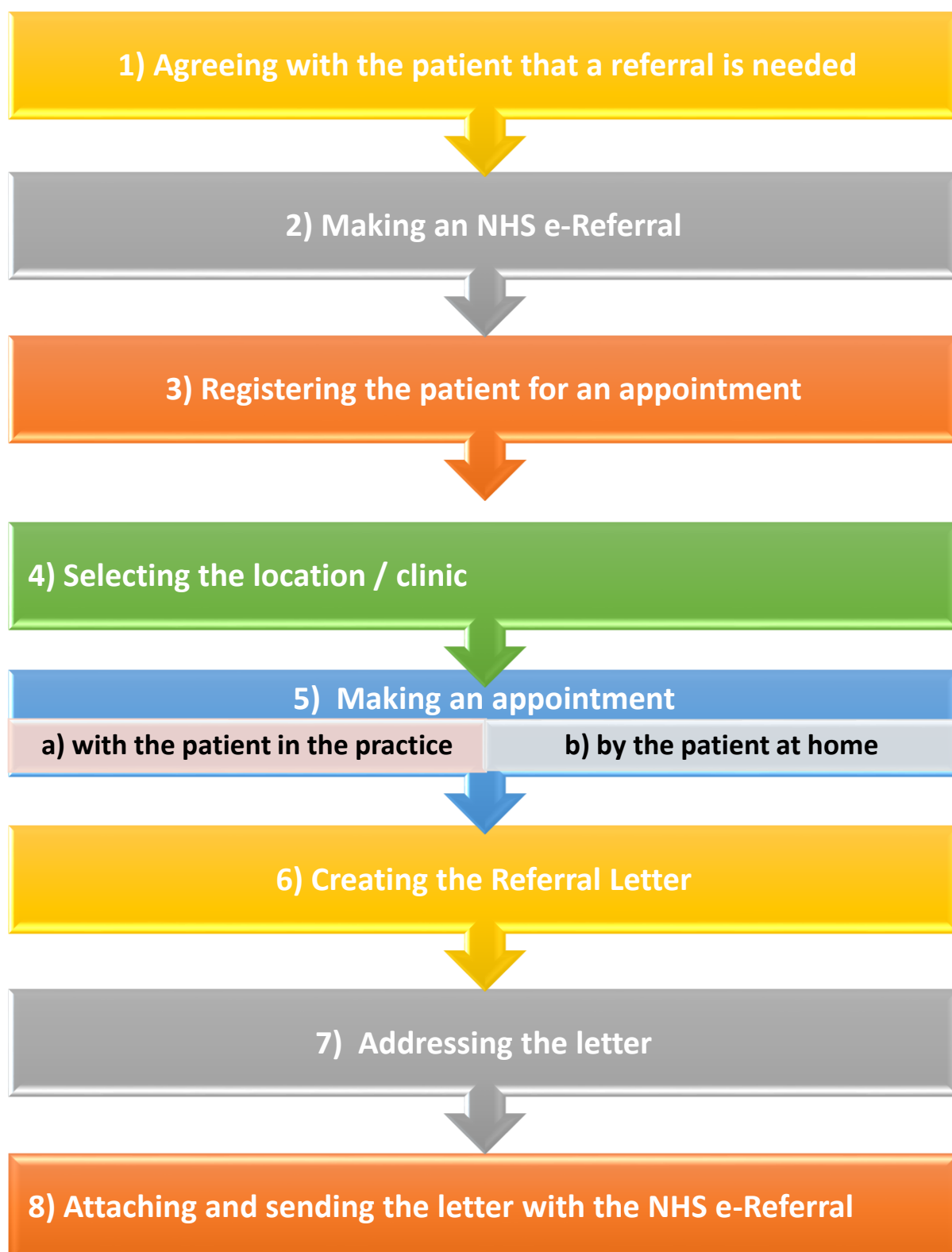
This guidance document provides North West London GP practices with instructions on how to make an NHS e-Referral, create and attach an EMIS Web referral letter.

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

1) Agreeing with the patient that a referral is needed

2) Making an NHS e-Referral

3) Registering the patient for an appointment

4) Selecting the location / clinic

5) Making an appointment

| a) with the patient in the practice | b) by the patient at home |

6) Creating the Referral Letter

7) Addressing the letter

8) Attaching and sending the letter with the NHS e-Referral

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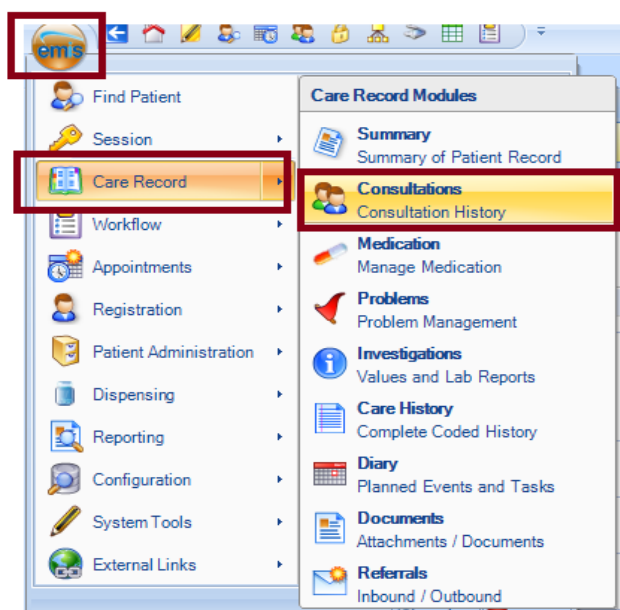
4. Within the open patient record click on **'Referral'** from the consultation tab then choose option **'NHS e-Referral** from the sub-menu option.
   a. Set the appropriate referral priority as either **Routine, Urgent or 2-week wait** as shown in the screen shot below
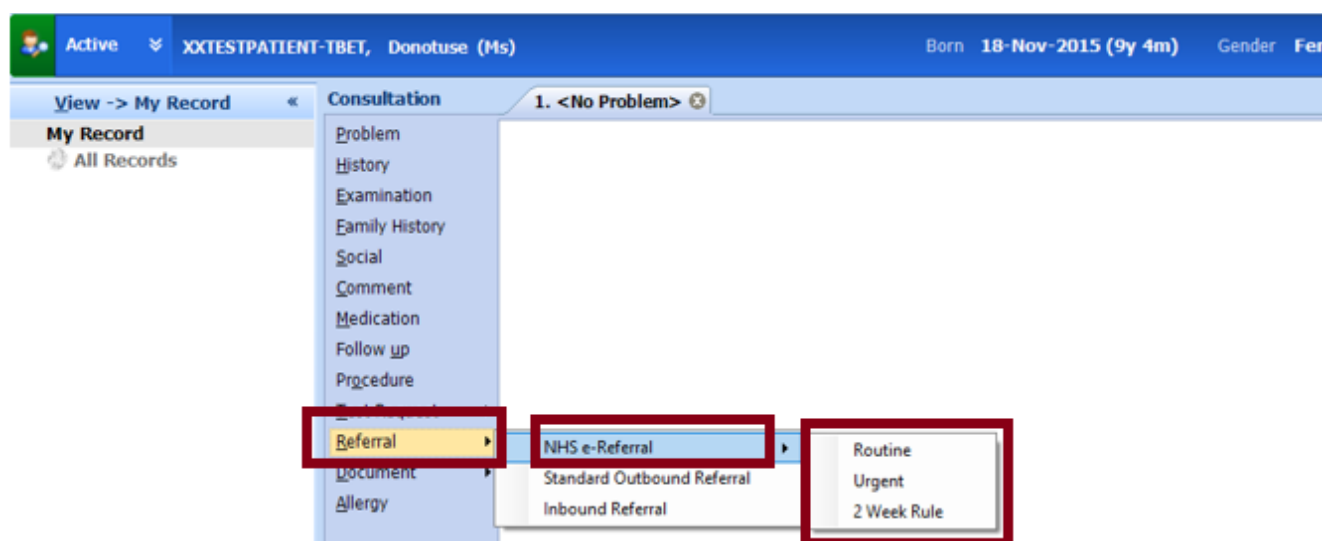
b. Or you can click on the **Add** > **Referral** > **NHS e-Referral** from the sub-menu option. ~Then set the priority as either **Routine, Urgent or 2-week wait** as shown in the screen shot below

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.
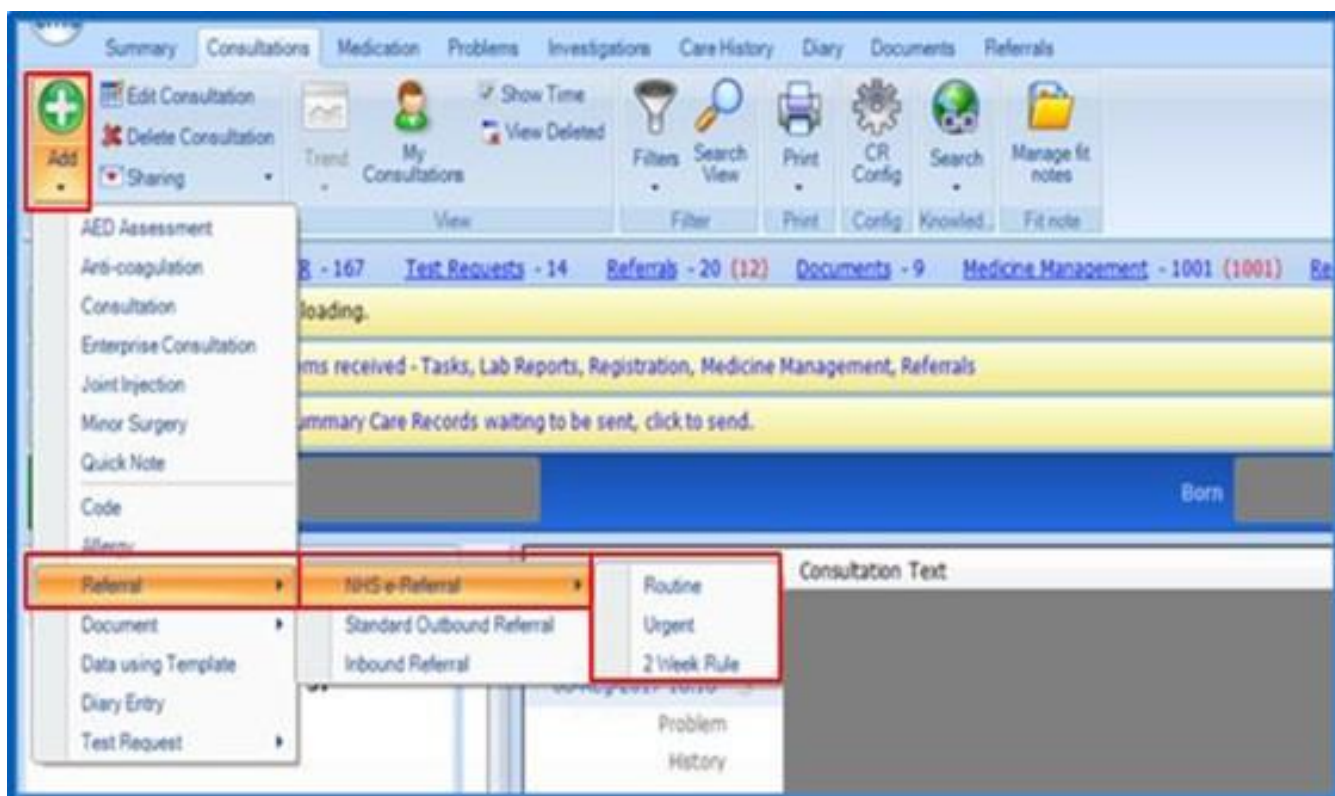
5. **Select** the **Referring Clinician** from the drop down and click on '**OK**'
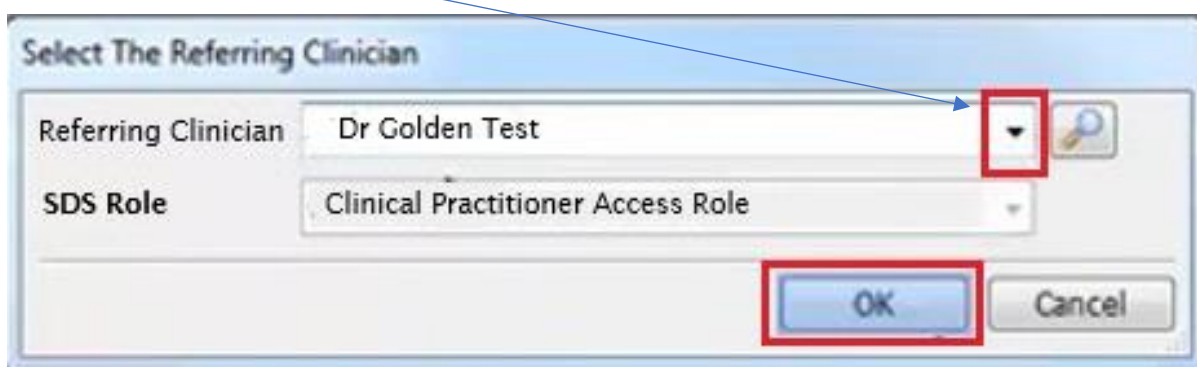
6. Microsoft Edge browser will be launched. **Select your login method**

7. Select **smartcard** option and click **Continue**
8. 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

Select an option	⌄

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

Cardiology	⌄

Clinic type

Hypertension	⌄

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

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

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.

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.

18. 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.

19. 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.

20. 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.
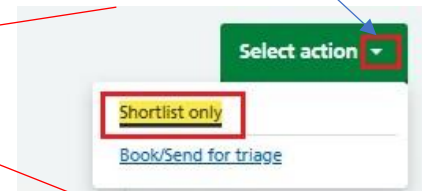
I.   Creating a Shortlist Option for the Patient

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

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

23. Click on **Print patient referral instructions** to send details to the patient for them to book their own appointment.
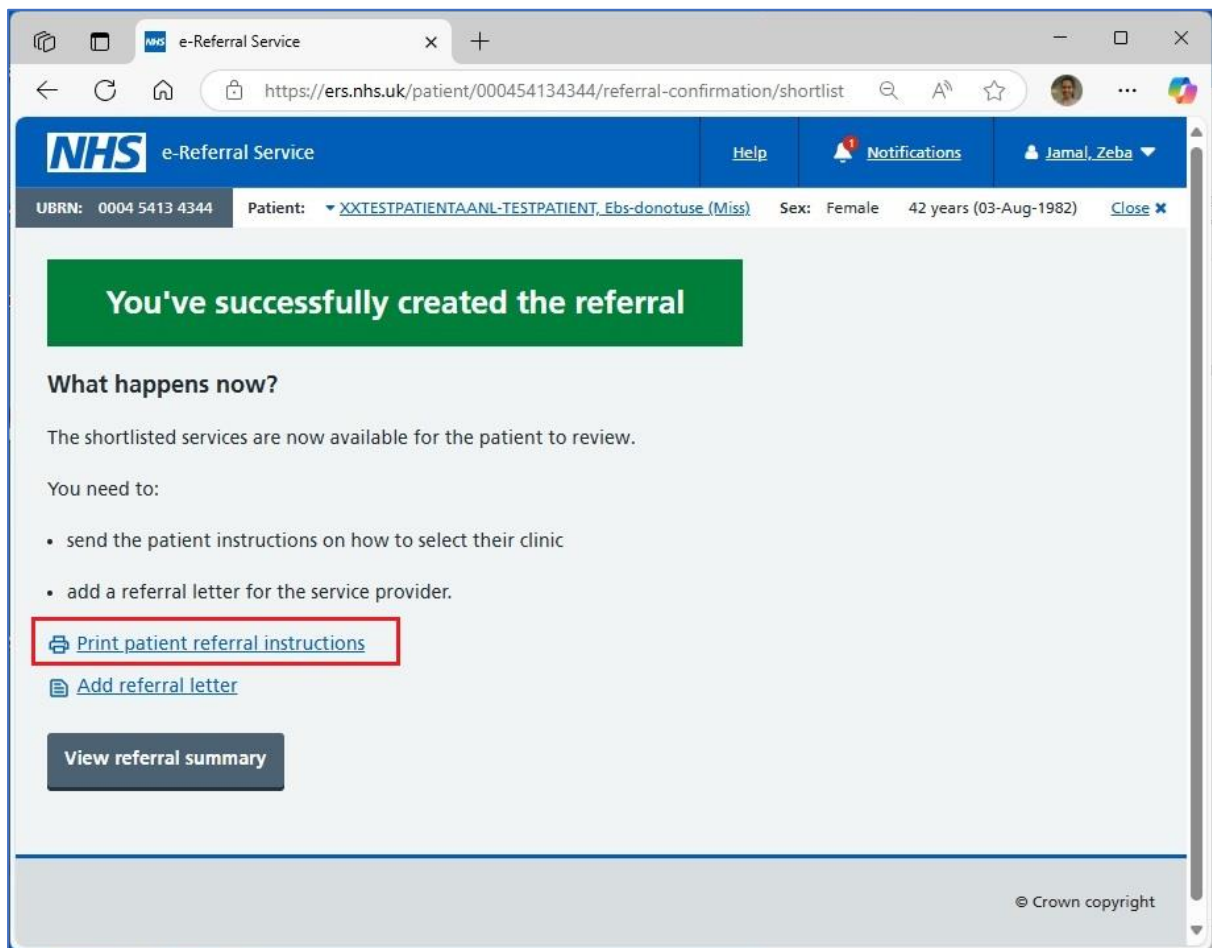
24. If you use the **save** option, the Referral Request Summary details will be downloaded onto the PC and this information can then be sent to the patient.
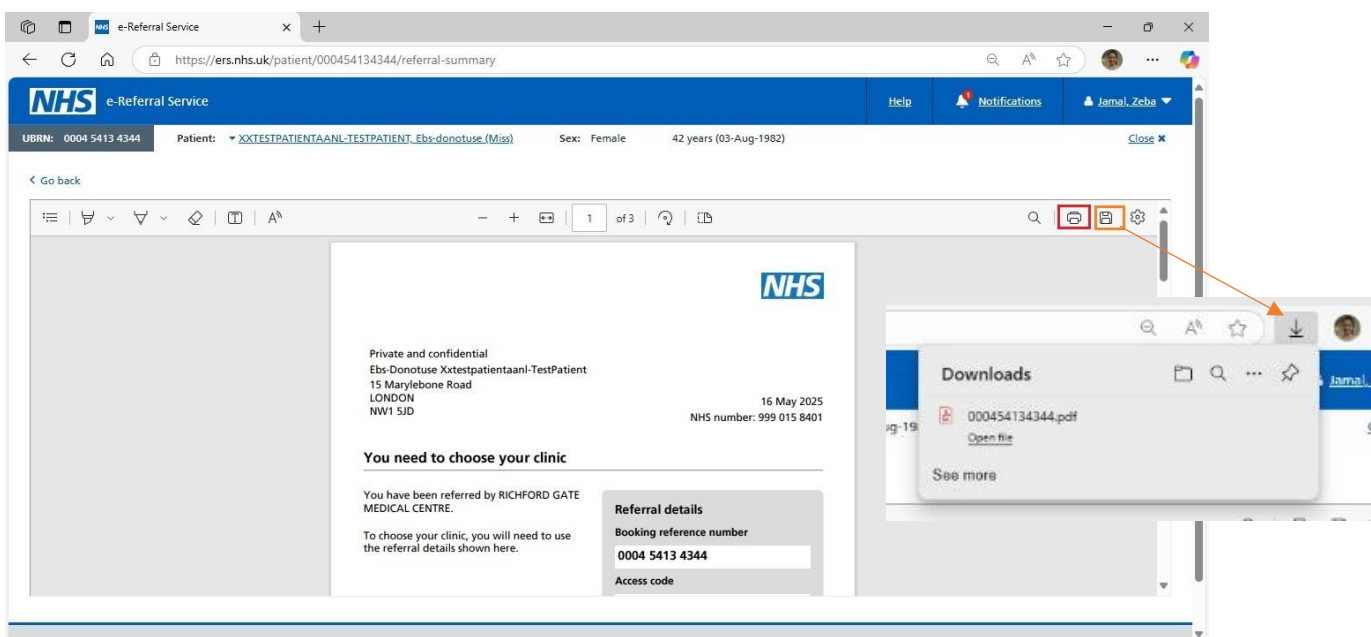
25. If you want to print the Appointment Request Summary to give to the patient for them to go and book their own appointment, then click on the printer symbol as shown below:

26. A letter is displayed with details for the patient to be able to book their own appointment.
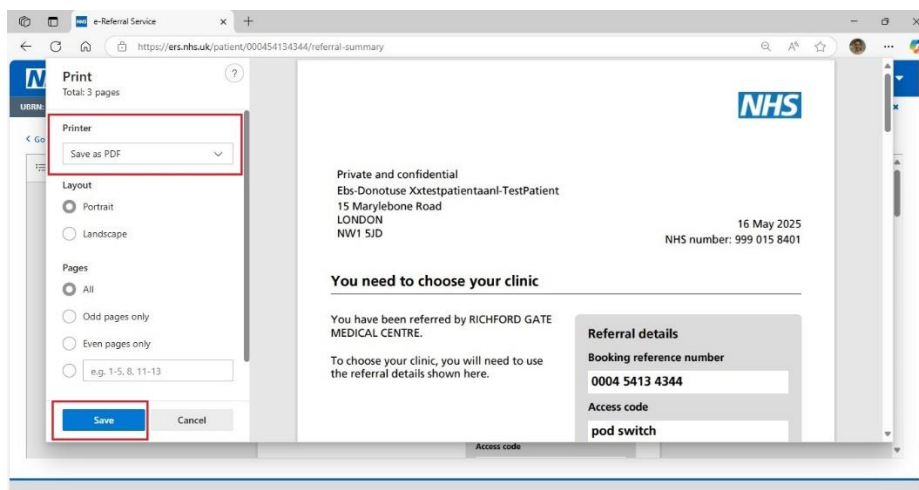
27. Select appropriate printer and **Save**. We have in this example saved to PDF.
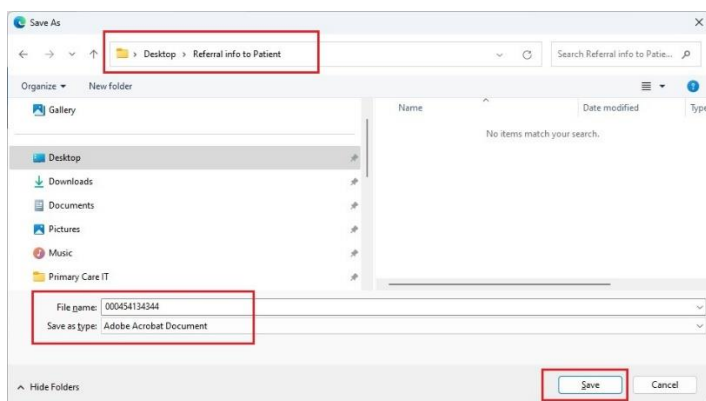
28. Click on the **Close X** hyperlink. Then you can close your browser to end the NHS e-Referral part of the process.
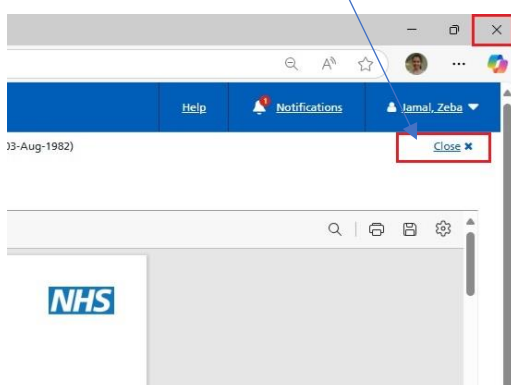
29. The patient will at this point have their booking details on a printout.
30. Now go to **Section Two** (2) **Create an EMIS Web Referral Letter:**

    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:

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

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).

37. Click on **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

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:

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

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**

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

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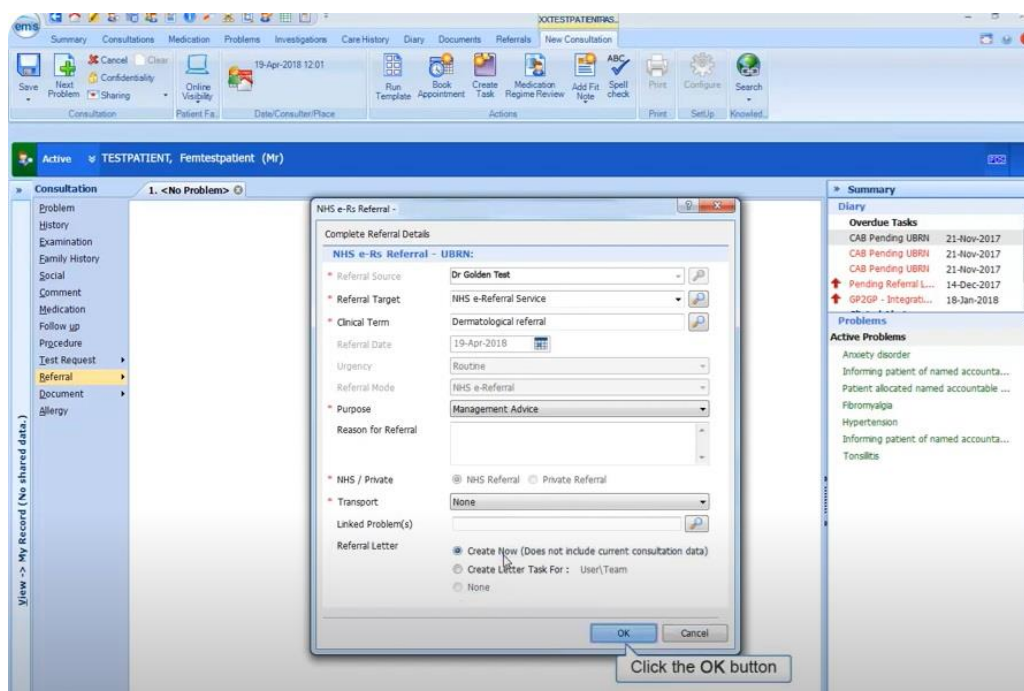
51. Fill out the **Complete Referral Details** box as shown below and click **ok**:

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

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

d. 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 be display at the bottom left corner, **selected code**. Then click **ok**.

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

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

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
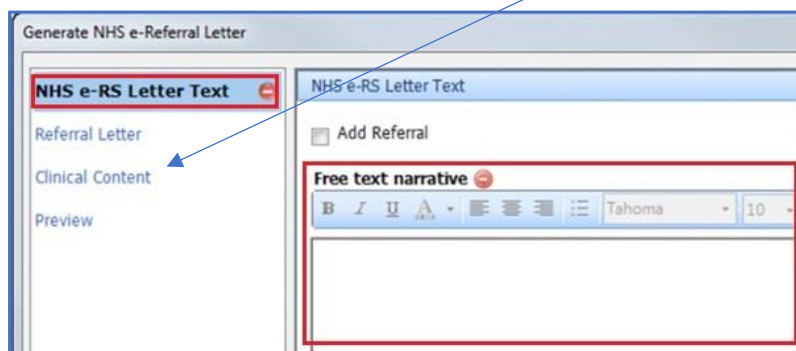
IV. New referral letter via practice template

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.
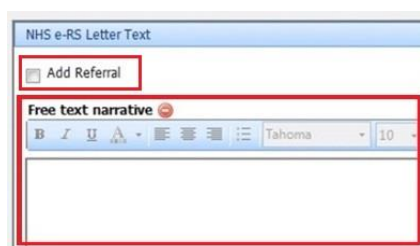
63. Following this, if you select the **Referral Letter** screen and click the **Select Template** link, you can search, select and complete the relevant template.
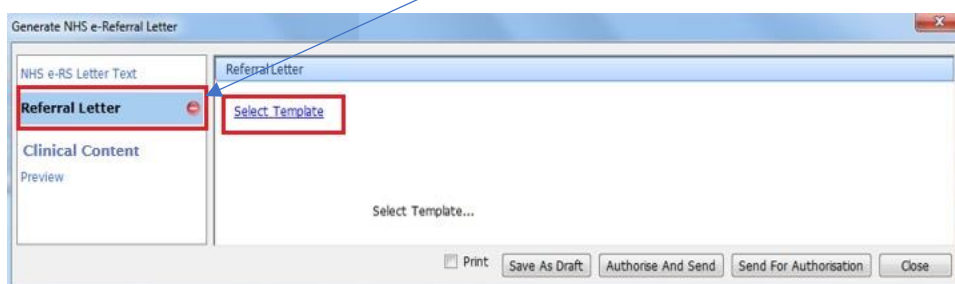
64. A new Patient Letter pop up box appears. If your template is listed, highlight the letter template name and click **ok** .Otherwise click on the magnifying glass icon to look for your letter template.
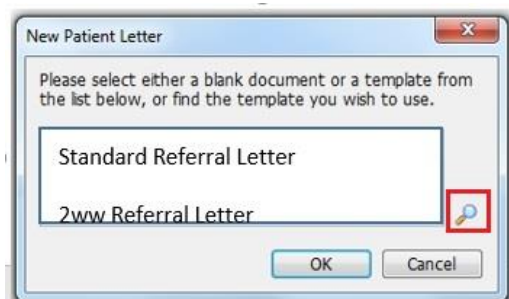
65. In Northwest London, we have folders named after the priority such as **2WW – Urgent Suspected Cancer (USC)**, the three boroughs Brent, Harrow and Hillingdon (**Borough-Specific forms**) or using the e-RS speciality where the user can find their relevant clinical letter template. In the example below we will navigate to the Cardiology folder and pick the **NWL ICS Cardiology Referral form**
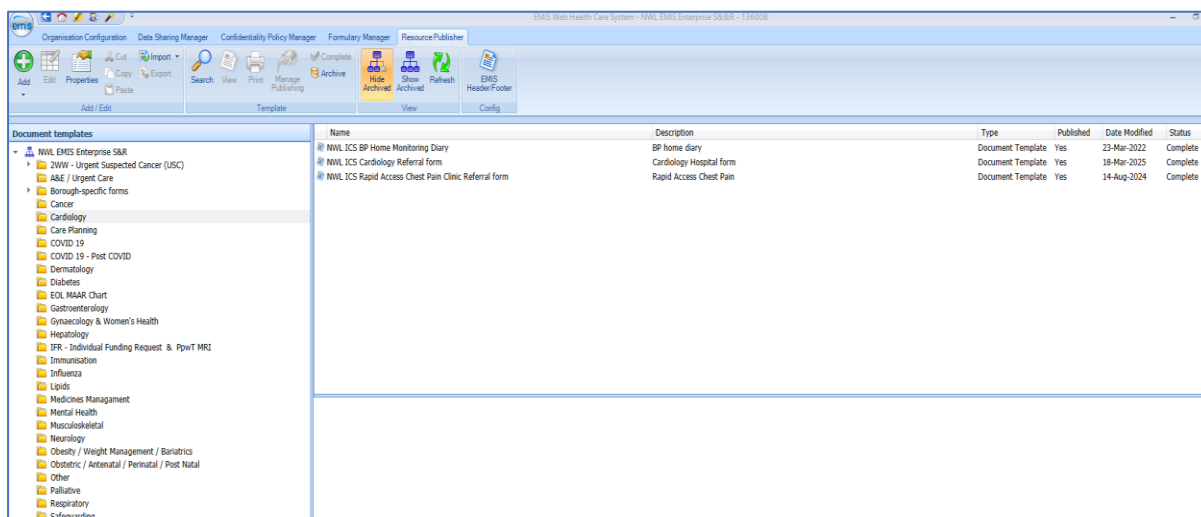
66. Edit you letter and save
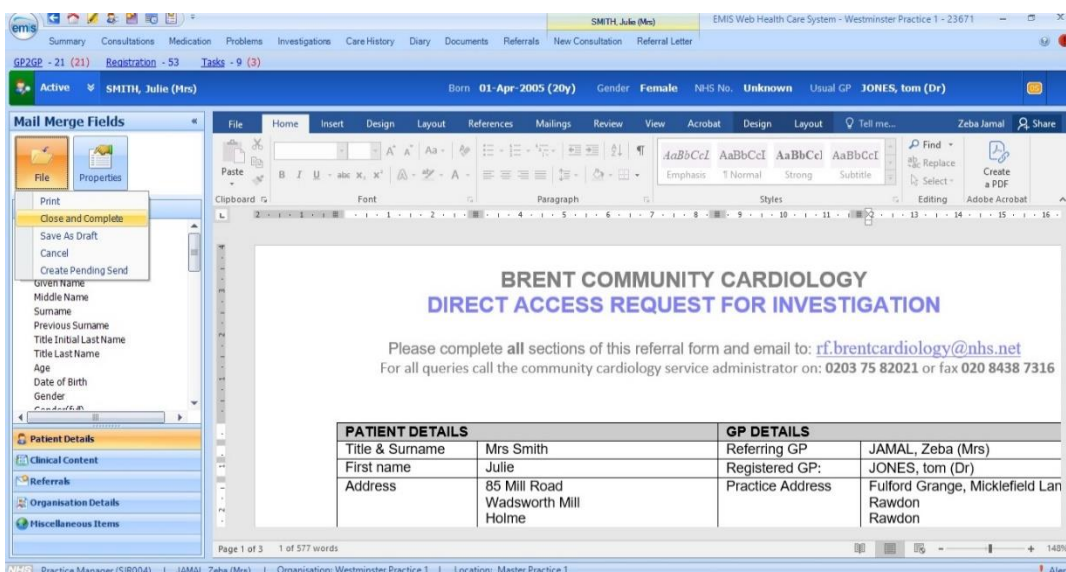
VII.   Attach an existing referral letter

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:

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:
    a. Total attachments selected has exceed 5MB.
    b. You have selected an invalid file extension.
    c. 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
Print	This will print a copy of the referral letter. If you select **Save as Draft**, a Draft copy is printed in the background of the letter.
Save as Draft	This saves the letter without sending it. A **Pending Letter** task is then created in **Referral Management** area.
Authorise and Send	It will send the referral letter to e-RS.
Send for Authorisation	This will send the referral letter to the originating clinician for authorisation before sending to e-RS. An **Awaiting Authorisation** task will be generated in Referral Management area.
Close	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.
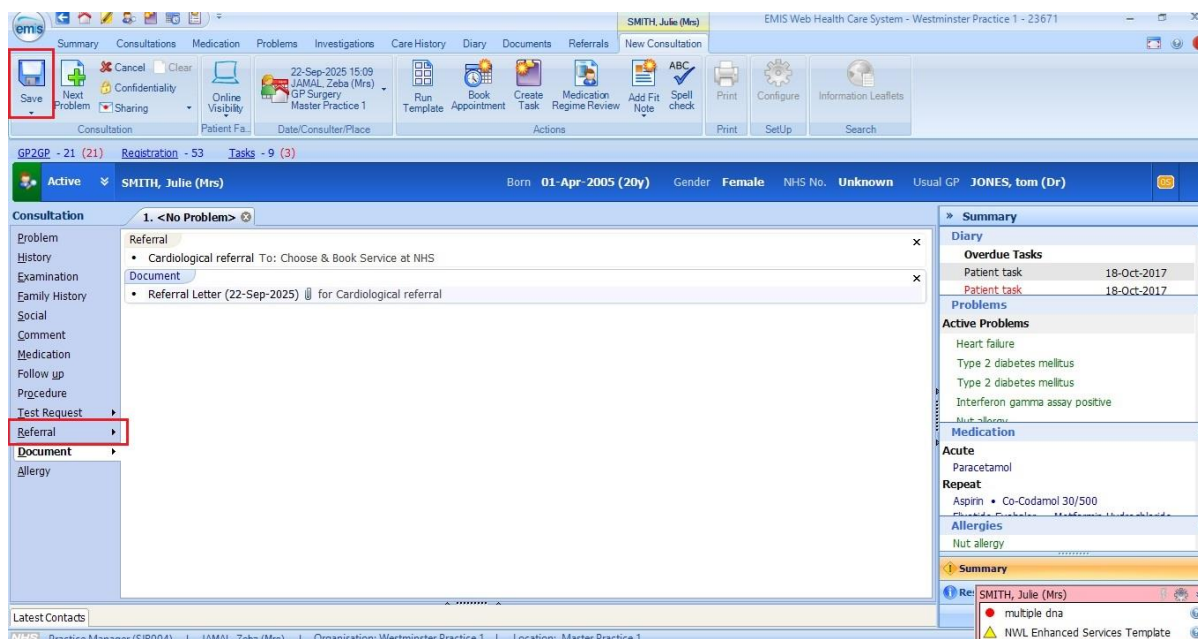
This action completes the NHS e-Referral process within EMIS Web.

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)

    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:

- Phone: 0203 350 4050
- Email: nhsnwl.servicedesk@nhs.net
- IT self-service portal: frontlineservices.nw.london.nhs.uk/HEAT/