

Rego Guide for Primary Care

A comprehensive guide for primary care users to create and manage Rego referrals and A&G via Rego

\Orchestrating a brighter world

TABLE OF CONTENTS

1.	<u>PREFACE</u>	11.	<u>SELECT PATHWAY</u>	21.	<u>REQUIRING ACTION</u>
2.	<u>START YOUR REFERRAL</u>	12.	<u>ADVICE & GUIDANCE (A&G)</u>	22.	<u>REQUIRING ACTION II</u>
3.	<u>EMIS SYSTEM</u>	13.	<u>GP NARRATIVE & ATTACHMENTS</u>	23.	<u>REQUIRING ACTION III</u>
4.	<u>EMIS SYSTEM II</u>	14.	<u>SAVE REFERRAL</u>	24.	<u>REQUIRING ACTION IIII</u>
5.	<u>EMIS SYSTEM III</u>	15.	<u>COMPLETE & SEND</u>	25.	<u>SAVED TAB</u>
6.	<u>SYSTEMONE</u>	16.	<u>FORM FUNCTIONS</u>	26.	<u>ACCESSING REPORTS</u>
7.	<u>SYSTEMONE II</u>	17.	<u>PREVIEW REFERRAL</u>	27.	<u>THANK YOU</u>
8.	<u>REGO</u>	18.	<u>PREVIEW CRI</u>		
9.	<u>SELECT A USER</u>	19.	<u>UBRN's</u>		
10.	<u>SELECT SPECIALTY</u>	20.	<u>TABS OVERVIEW</u>		

PREFACE

Please ensure you have smartcard access with applicable configurations for your site.
Please contact your respective smartcard services for more

The first section of this guide will cover your referral journey from your patient record system (EMIS/SystemOne) through to Rego. The latter stages will look at managing your referrals once sent.

START YOUR REFERRAL

Admins can start a referral on behalf of a clinician. The referral can be saved at any stage, for the clinician to complete

To begin the referral process, you need to start from your patient record system

For EMIS users, please [click here](#)

For SystemOne users, please [click here](#)

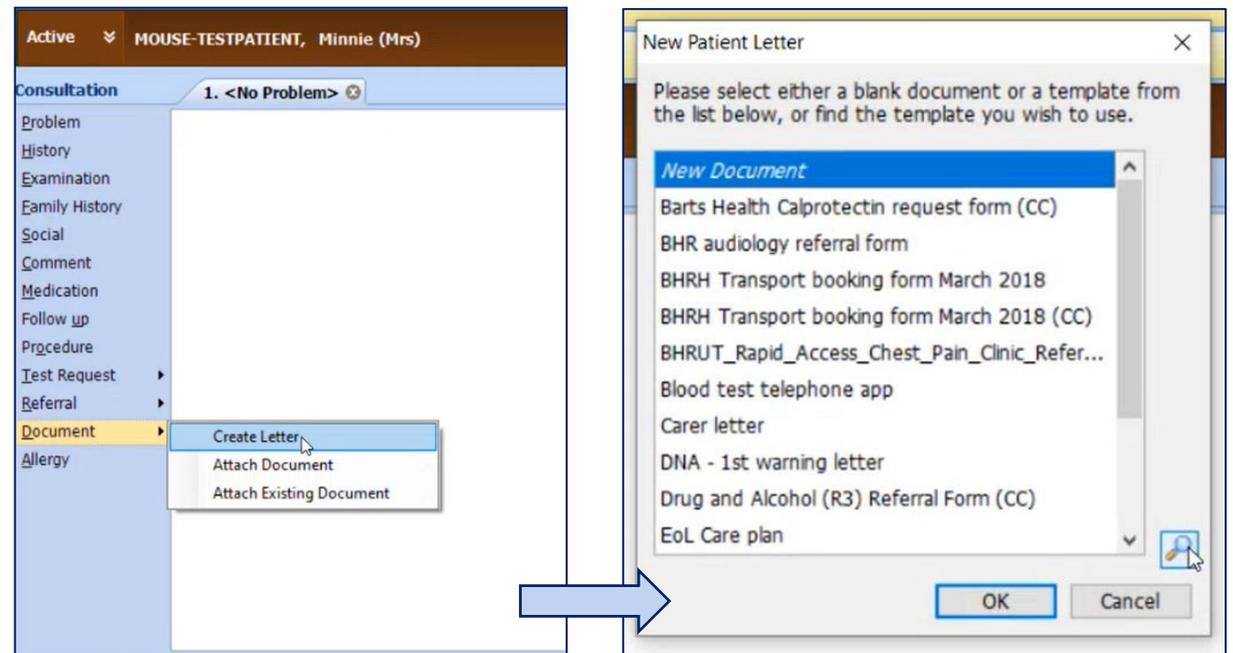
EMIS SYSTEM

On **EMIS**, first locate the patient you would like to refer

Using Consultation, click **Document** and then **Create Letter**

This will present a pop up to choose a proforma from

If the Rego titled proforma isn't in the list, click the magnifying glass on the bottom right handside to search for it.

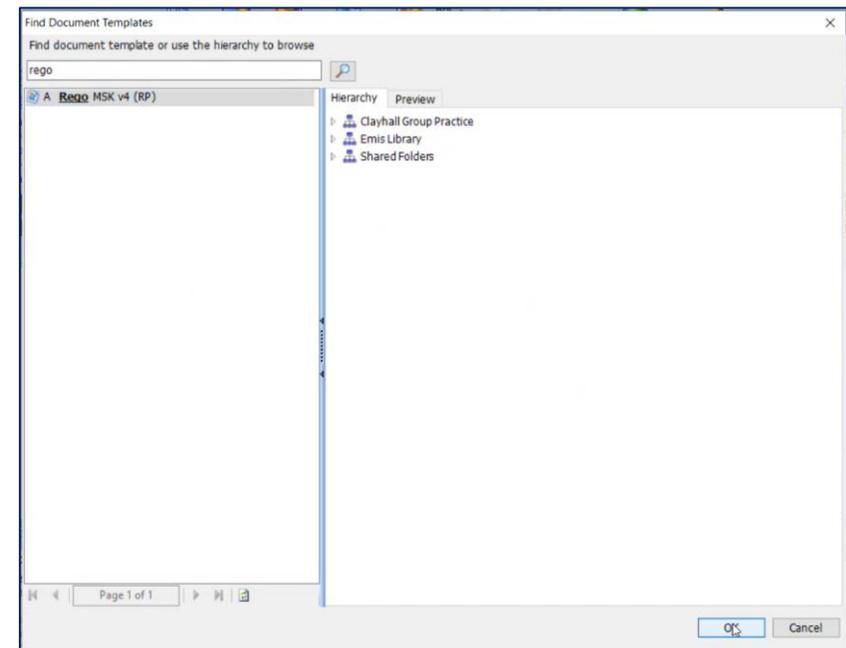


EMIS SYSTEM II

After clicking the magnifying glass, a new pop up will appear

In the top left handside search field, type **Rego**, to narrow the list of proformas down

Double click, or highlight and click **OK** bottom right of the pop up to open the proforma



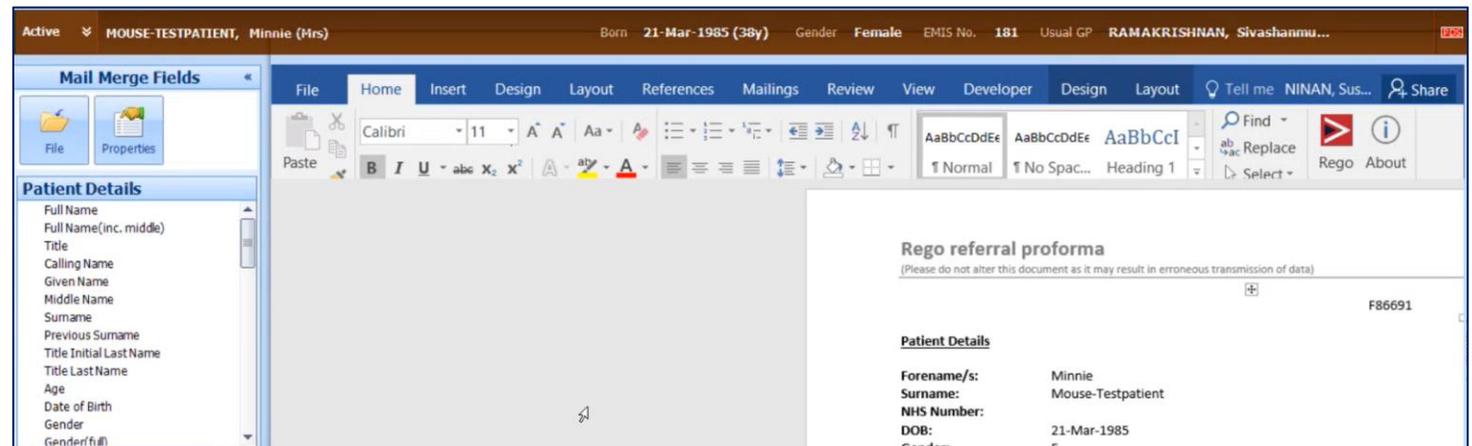
EMIS SYSTEM III

The proforma or template will open with the patient's details prepopulated

You will then be automatically redirected to the Rego referral portal to start your referral

Should this action not occur, simply click the red Rego icon, top right of the MS-Word ribbon

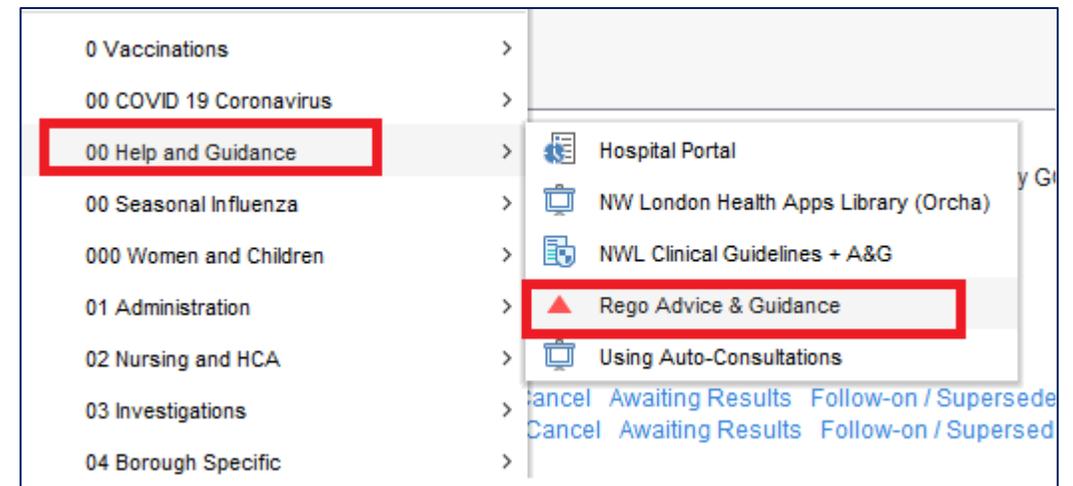
[Click here](#) to skip SystemOne instructions



SYSTEMONE

On **SystemOne**, first locate the patient you would like to refer

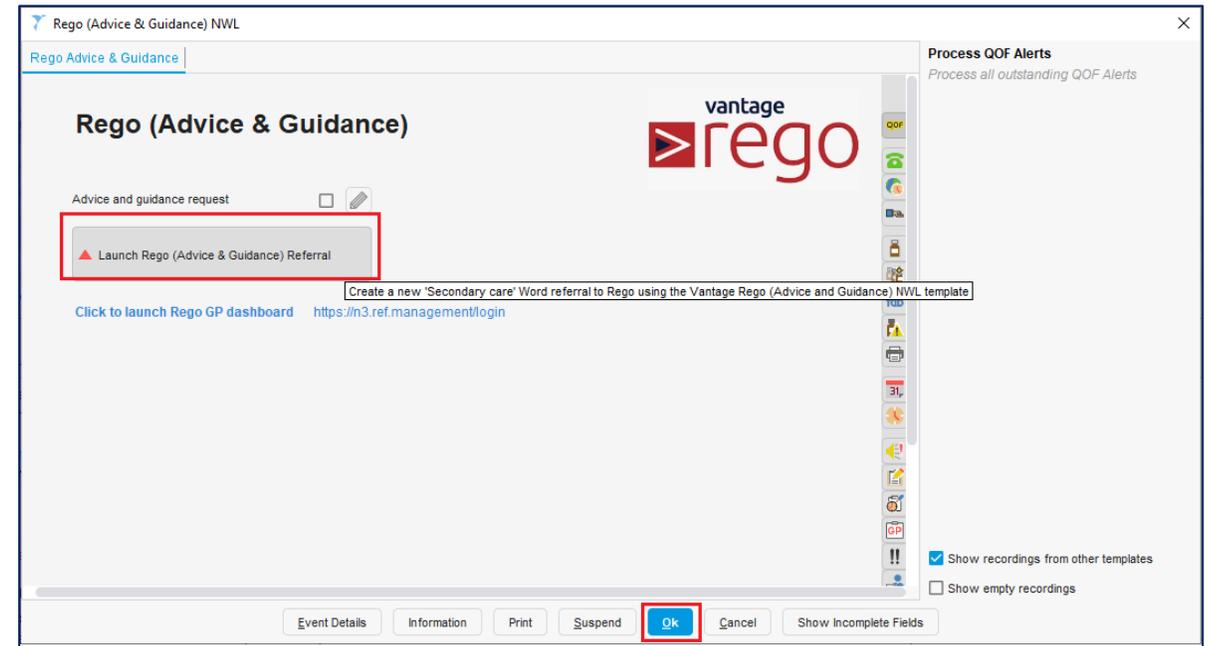
Using **AutoConsultation**, click **00 Help and Guidance** and then click **Rego Advice & Guidance**



SYSTEMONE II

You will now be able to **Launch Rego (Advice & Guidance) Referral** and then click **Ok**

This would then load up the patient proforma via Microsoft Word and then automatically into Rego to start your referral process.



REGO

In Rego, you will be presented with a dynamic form with patient demographics located on the dark blue banner

This will include patient name, date of birth, NHS number and more

Please review this information to ensure patient details are correct and up to date

The screenshot shows a patient information form in the Rego system. The form is displayed on a dark blue banner at the top, which contains patient demographics. Below the banner, there is a form with a 'Referrer' section. The 'Referrer' section has a dropdown menu with 'Current user' selected. At the bottom of the form, there are 'Cancel' and 'Save' buttons. A vertical 'LIVE CHAT' button is visible on the right side of the form.

DONOTUSE, XXTESTPATIENT-TGNP (Mr.)		Born	06-Jan-1932 (91)	Gender	Male	NHS No.	999 054 8609	Hospital No.	NA
Address	1, TREVELYAN SQUARE, LEEDS, LS1 6AE	Phone	07723822785 (home) 07001002003 (mobile)	Email	testpatient@necsws.com	Edit Address	GP info	Spine info	URN 0

Referrer

Please select

Current user

Cancel Save

LIVE CHAT

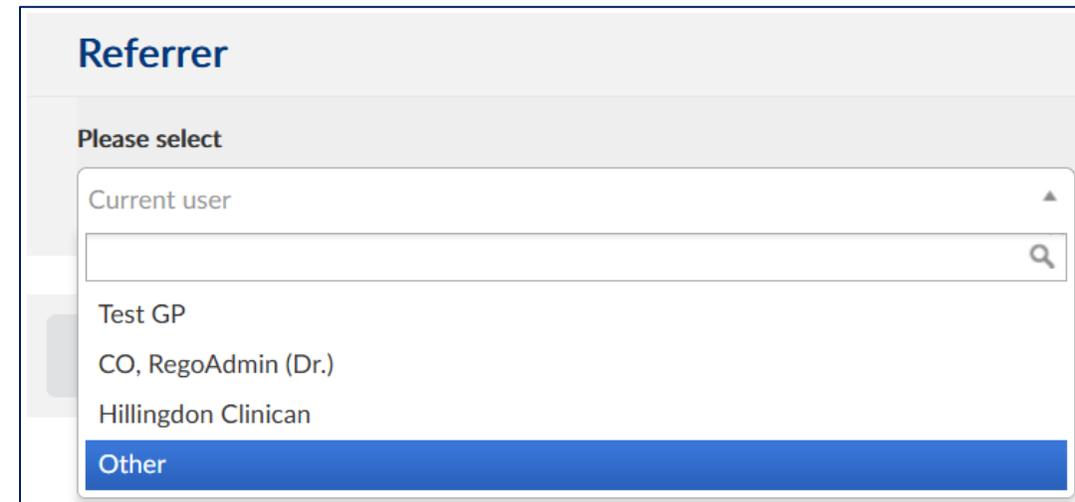
SELECT A USER

First, select a user from the dropdown list

If your name is not in the dropdown list, click **Other** to manually add yourself on

Next time you make a referral, your name will be in the list of users to select from

To remove a user, please [contact our helpdesk](#) with your practice name and postcode with the full name of the user(s) you will like removed



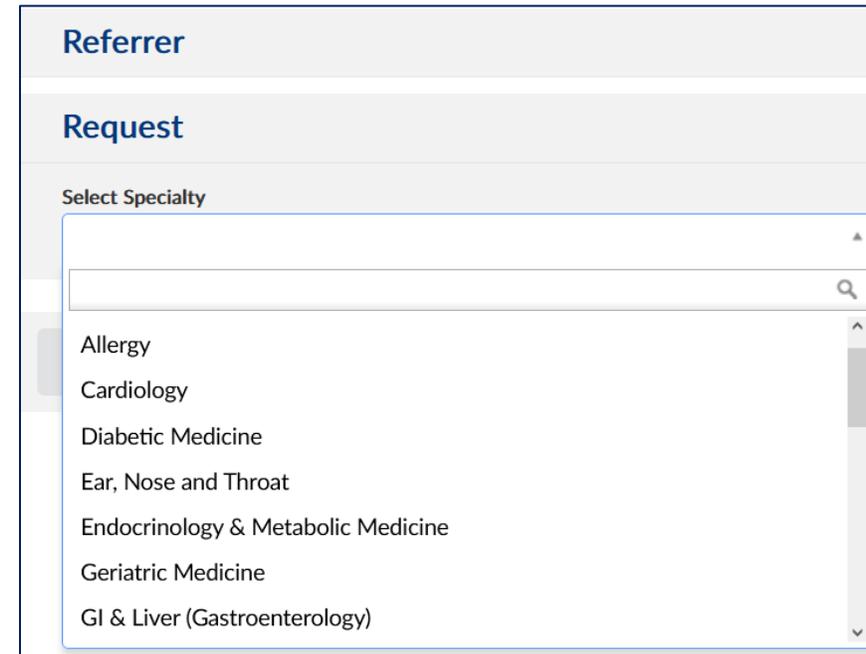
The screenshot shows a web interface for selecting a referrer. The title is 'Referrer'. Below it is a 'Please select' dropdown menu. The current selection is 'Current user'. Below the dropdown is a search bar with a magnifying glass icon. The dropdown list is open, showing the following options: 'Test GP', 'CO, RegoAdmin (Dr.)', 'Hillingdon Clinician', and 'Other'. The 'Other' option is highlighted in blue.

SELECT SPECIALTY

After selecting a user, we need to now indicate a reason for referral

Click in the **Select Specialty** dropdown to select a relevant specialty for referral

There will be some more follow up questions regarding the chosen specialty to get your referral to the right place (not applicable to [A&G](#))



The screenshot shows a web form with three sections: 'Referrer', 'Request', and 'Select Specialty'. The 'Select Specialty' section contains a dropdown menu with a search icon in the top right corner. The dropdown is open, displaying a list of medical specialties: Allergy, Cardiology, Diabetic Medicine, Ear, Nose and Throat, Endocrinology & Metabolic Medicine, Geriatric Medicine, and GI & Liver (Gastroenterology). A vertical scrollbar is visible on the right side of the dropdown list.

SELECT PATHWAY

After selecting a **Specialty**, you can then select a pathway or area of concern.

So, if we select MSK as a specialty, you can then indicate Knee, Spine or Shoulder, amongst others, as a **Pathway**.

You will be asked follow up questions to direct your patient to the most appropriate level of care, based on the type of answers you provide.

Request ▼

Select Specialty

Select pathway

Elbow

Knee

Hip

Foot & Ankle

Spine

Shoulder

Hand & Wrist

Knee

Is there a suggestion of any red flags or other urgent causes?

None

Suspected inflammatory arthropathy (such as rheumatoid arthritis, psoriatic arthritis, lupus, Bilateral SIJ pain, etc.)

Suspected malignancy (Unexplained weight-loss or previous history of cancer)

Suspected or known infection (primary care management failed)

Please look out for the **red dots** to the right of the form, which indicates an unanswered field. You won't be able to proceed further with the referral unless all fields have been completed.

ADVICE & GUIDANCE (A&G)

You can also seek **Advice & Guidance** (A&G) requests via Rego

Unlike Smart Pathways where follow up questions are required, A&G cases will simply require a referral reason, level of urgency and a narrative

You can still upload clinical documents and include any previous consultations, in the same way you would for a normal referral

The request will then be sent to the required department, where guidance, if any, will be returned to your **Requiring Action** tab on Rego

The screenshot shows a web form titled 'Cardiology' for submitting an Advice & Guidance request. The form includes the following sections:

- Indicate reason:** A row of buttons for selecting a reason. 'General Cardiology' is selected and highlighted in blue. Other options include 'Arrhythmia / Palpitations', 'Chest Pain', 'Heart failure', 'Hypertension', and 'Ischaemic Heart Disease'.
- Please indicate priority:** Radio buttons for 'Routine' and 'Urgent'. 'Urgent' is selected.
- Narrative of the advice and guidance:** A large text area for providing a narrative.
- Attachments:** An 'Upload files' button and a dashed box labeled 'Drop files here' for attaching documents.
- Consultations:** A toggle switch labeled 'Include' which is currently turned on.
- NHS e-RS Service Selection:** A dropdown menu at the bottom of the form.

GP NARRATIVE & ATTACHMENTS

To further allow you to paint the right picture for your patient, you have the option to add more info via freetext.

You can also upload clinical images and/or documents via file explorer (**Upload files**) or upload directly from EMIS via **Upload from EMR**

You can also drag and drop the file into the referral. Simply drop the file in the field marked 'Drop files here'

The screenshot shows a web interface for entering a GP narrative and attachments. It is divided into two main sections: 'GP narrative' and 'Attachments'.

GP narrative

Please provide detailed history and clinical examination

Supporting information in free-text to further assist the consultant.

Attachments

To attach documents stored in any format from EMIS click 'Upload from EMR' and follow these 3 steps (Click here for video explainer):

1. Open EMIS > click 'Documents' tab
2. Highlight relevant document/s > right click 'Export' > 'Upload to Rego' folder
3. Confirm prompts > return to Rego

Upload files Upload from EMR

Drop files here

SAVE REFERRAL

On Rego, you can **Save** a referral at any stage before you send it off

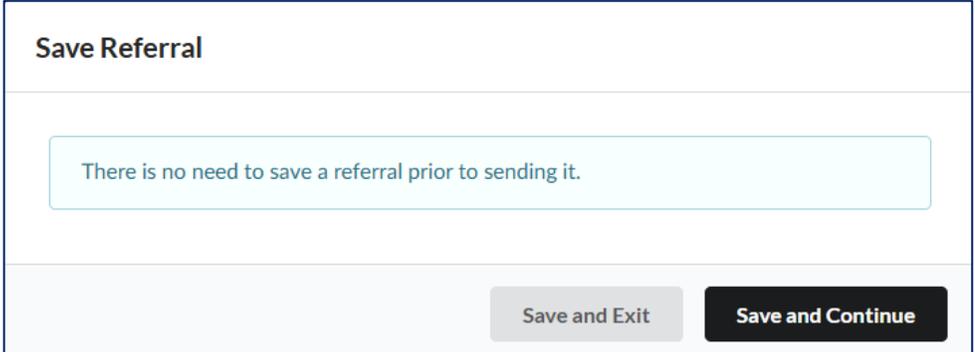
The Save button is located on the bottom left of your referral form, next to Cancel. Click **Cancel** at any stage of the form to abandon your referral

After pressing Save, you have the option to either **Save and Exit** the referral or **Save and Continue** to carry on working, with a record of the referral stored in your **Saved tab**

Once you **Send** the referral off, that record moves from Saved to Pending



The screenshot shows a form with two main sections: 'Referrer' and 'Request'. The 'Referrer' section has a dropdown menu with 'Tom Jones' selected. The 'Request' section is currently empty. At the bottom of the form, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red border.



The screenshot shows a dialog box titled 'Save Referral'. Inside the dialog, there is a light blue message box that says 'There is no need to save a referral prior to sending it.' At the bottom of the dialog, there are two buttons: 'Save and Exit' and 'Save and Continue'.

COMPLETE & SEND

Once images have been attached, you can choose to include or exclude the last three consultations for the patient, you feel is most relevant to the referral you are making.

Finally, the patient can choose from a list of services available, that can see your patient, based on the information you have provided.

Once selected, we strongly advise to read through your referral form one more time, before pressing the green **Accept and Search for Appointment** button to send off your referral.

Consultations

Consultations

Include

NHS e-RS Service Selection

Criteria

Referral criteria based on patient history, referral information and local guidelines.

Priority	Speciality	Clinic Type
Routine	Physiotherapy	Musculoskeletal

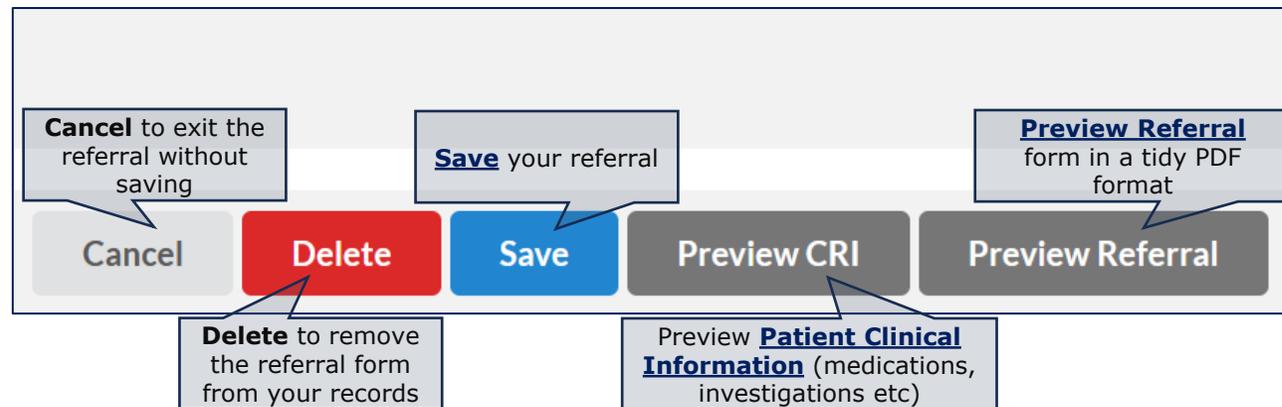
Shortlist

Based on commissioner requirements and service availability, a shortlist / selection has been automatically generated.

Service Name	Location
<input checked="" type="checkbox"/> HHCP-MSK Physiotherapy Service - The Warren - Hillingdon Community Health RV3	Hillingdon
<input checked="" type="checkbox"/> HHCP MSK Physiotherapy Service - Lower Limb-The Hillingdon Hospital Trust	Hillingdon
<input checked="" type="checkbox"/> HHCP MSK Physiotherapy Service - Lower Limb-The Mount vernon Hospital Trust	Mount Vernon
<input checked="" type="checkbox"/> HHCP-MSK Physiotherapy Service - Eastcote - Hillingdon Community Health RV3	Hillingdon
<input checked="" type="checkbox"/> HHCP-MSK Physiotherapy Service - Uxbridge - Hillingdon Community Health RV3	Hillingdon

[Refine Search](#) [Accept and Search for Appointment](#)

FORM FUNCTIONS



PREVIEW REFERRAL

A redacted preview of a referral in a PDF format




Demographics

<p>Patient name: 1, Test</p> <p>Address:</p> <p>Phone Number:</p> <p>Email:</p> <p>Communication preference: phone</p> <p>DOB: 22-Feb-2001 (23)</p> <p>Gender: Male</p> <p>NHS number:</p> <p>Case ID:</p>	<p>Date of referral: 26-Nov-2024</p> <p>Referrer information: Chris REGOadmin</p> <p>Referrer Address:</p> <p>Referrer contact:</p> <p>GP Practice Name: Churchside Medical Practice</p> <p>GP Practice Address:</p>
---	--

Referral information

Request

Speciality:	Cardiology
Select pathway :	Cardiology

Cardiology

Indicate reason :	Cardiac Health & Rehabilitation
Narrative of the advice and guidance :	THIS IS A TEST CASE - PLEASE DO NOT ACTION.

(Internal report ID: 6577678)

PREVIEW CRI

Preview of patients **Clinical Record (of) Information (CRI)**

Clinical Information Summary

Past

Date	Problem	Associated Text	Date Ended	
06-Feb-2013	Asthma	wheezy when around p[etv cat	30-Sep-2014	Redact
05-Jan-2012	Benign intracranial hypertension	patient seen by med team, diagnosed with BIH. advised fluids and discharged. no letter as of yet	19-Sep-2014	Redact
23-Jan-2006	[D]Headache			Redact

Medication

Drug	Dosage	Quantity	Last Issued On	
Finasteride 5mg tablets	One To Be Taken Each Day	1 tablet	23-Sep-2022	Redact
Lisdexamfetamine 20mg capsules	1	28 capsule	23-Sep-2022	Redact
Methylphenidate 18mg modified-release tablets	1	30 tablet	23-Sep-2022	Redact
Methylphenidate 5mg tablets	1	30 tablet	23-Sep-2022	Redact

UBRN's

Upon sending a referral, a **UBRN** (Unique Booking Reference Number) will be generated. This can be used on eRS to track your referral also

This means you needn't duplicate the referral you have just sent off again on eRS as Rego has automatically mirrored that procedure

Any further action taken on the referral via Rego (referral accepted, rejected, discharged) will also be mirrored on eRS, and vice versa

Next, we look at how to track cases on Rego.

TABS OVERVIEW

REQUIRING ACTION – This mainly consists of cases that have been returned into your care, usually with guidance. Referral status will be ***Returned to Referrer (eRS)***

PENDING – A fairly quiet tab, where all sent cases are stored pending action from the provider. ***Awaiting Confirmation*** for all A&G cases and ***Sent*** for any referrals

ACTIONED – Cases will be in ***Sent (eRS)*** as the status for all sent cases and ***Accepted (eRS)*** for when said case has been accepted

DISCHARGED – A redundant tab. Nothing is discharged back in here

SAVED – For all saved or queued referrals

ARCHIVE – All archived cases are stored here for your records

REQUIRING ACTION

Requiring action (41) Pending Actioned Discharged Saved Archive

Date to [Search](#)

Patient Name	NHS	Referrer	Days since ref	Presenting complaint	Status	
			x dd / mm / yyyy			
			126 days	GI & Liver (Gastroenterology incl. Colorectal)	Advice provided	Archive
			99 days	General Paediatrics	Returned to Referrer (eRS)	Archive
			97 days	Haematology	Returned to Referrer (eRS)	Archive
			90 days	GI & Liver (Gastroenterology incl. Colorectal)	Returned to Referrer (eRS)	Archive
			90 days	General Paediatrics	Returned to Referrer (eRS)	Archive
			84 days	General Paediatrics	Returned to Referrer (eRS)	Archive
			71 days	Haematology	Returned to Referrer (eRS)	Archive
			71 days	Allergy	Advice provided	Archive
			69 days	Cardiology	Returned to Referrer (eRS)	Archive
			68 days	GI & Liver (Gastroenterology incl. Colorectal)	Returned to Referrer (eRS)	Archive
			64 days	Other Gynaecology	Awaiting further information (eRS)	Archive
			58 days	Rheumatology	Returned to Referrer (eRS)	Archive
			55 days	GI & Liver (Gastroenterology incl. Colorectal)	Returned to Referrer (eRS)	Archive

LIVE CHAT

REQUIRING ACTION II

The **Requiring Action** tab is the first and default tab that will appear when logged in to Rego. It is the only tab where guidance is returned, cases are rejected, or further information has been requested from the provider

In the overview, you can switch the columns around to suit your liking. Simply click on the column name, and drag to your preferred position



You can search or use the funnel to filter or where easier, simply click on the column name



The Archive button allows you to close a record, which moves the case from your Requiring Action, to your Archive tab for your records.



REQUIRING ACTION III

Here's an example of a referral returned with Advice

You can review the comments of the provider in the **Advice** segment to the right of the page

You will then have the option to either **Request Further Info** or **Accept and Complete** the record if happy with the advice given

You can also **PDF** and import a copy of the referral into your PMS if required – this is available on every referral, regardless of its status or tab

Supporting Information
12-Jul-2023

Images
Documents
PMHx

Sent
(12-Jul-2023)

Sent To: [Redacted]

Advice
(14-Jul-2023)

Please consider referring this lady to the MSK service as she wants to consider interventional treatment which we do not offer in the pain service.

Request further info

Accept and Complete

PDF

REQUIRING ACTION IIII

In the **Further Information Requested** section, we can see a provider requesting additional information about a Knee referral

Should you receive something similar regarding your referral, you can use the **Reply** button to respond back to the query

Supporting Information (Dr.) (18-Jul-2023)

Images Documents PMHx

Sent (eRS) (Dr.) (18-Jul-2023)

UBRN: [REDACTED]
Service/s:
• Lower Limb CATS [REDACTED]

Further information requested (20-Jul-2023)

Comments: Dear Dr [REDACTED]

Please provide further information with regard to the physiotherapy this patient has had, on FCP assessment clinical test all -ve, what is likely diagnoses.?

Many thanks

Reply PDF

SAVED TAB

To retrieve a saved referral...

1. [Login to Rego](#) and visit the **Saved** tab
2. Click on your patients name to carry on from where left off

Q Patient name, dob, hospital #, or URN

Requiring action (1) Pending Actioned Discharged **Saved 1** Archive

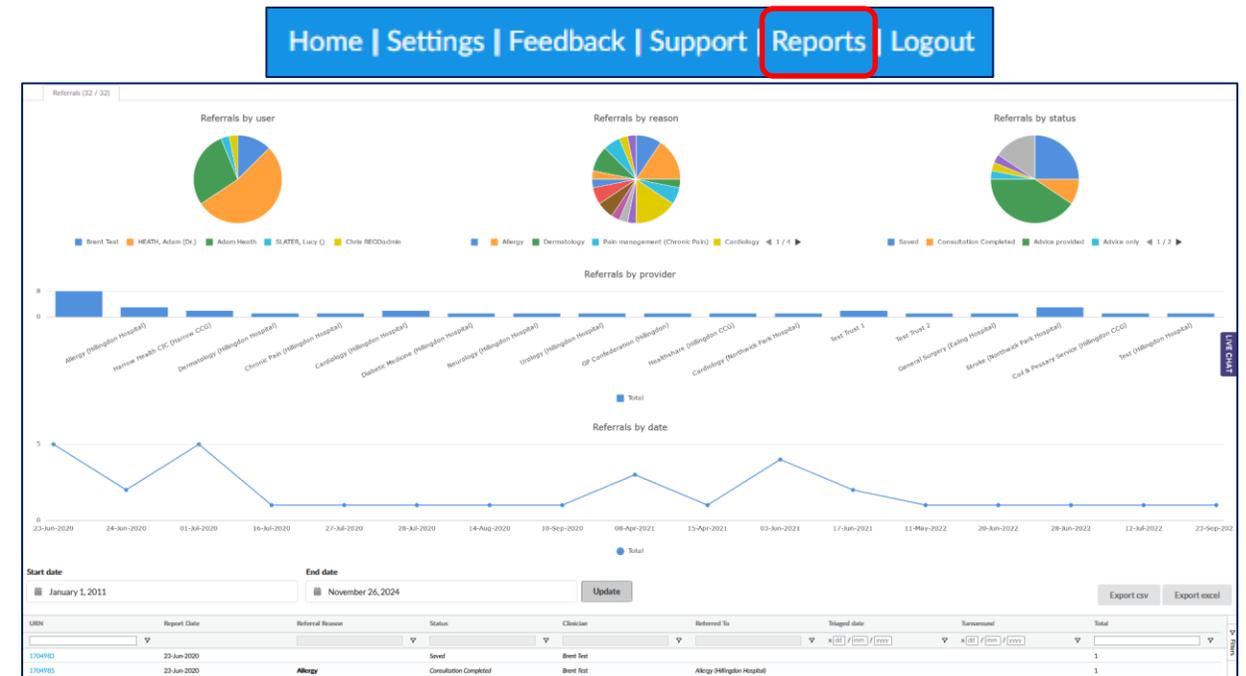
Patient Name	NHS	Referrer
<input type="text"/>	<input type="text"/>	<input type="text"/>
Age 1, Test		Peter Jones
Age 1, Test 2		Tom Jones

ACCESSING REPORTS

To access the reports module, please log in to Rego and on the top right handside of your page, there will be a **Reports** button, left to the logout button

In reports, you can set a date range for the date you want to see, as well as filter by user, referral reason and/or status

The report can be exported as an excel / .csv file



We hope this guide has been helpful to you and your colleagues

For technical support regarding Rego, please contact our dedicated helpdesk team via rego.support@necsws.com

For clinical support, please contact your internal clinical leads within your ICB. Please be advised that the **Rego support team are not medically trained** with very limited clinical knowledge. Please only use the above email for **technical support only**.

THANK YOU