2025

NHS e-Referrals SystmOne TPP

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 SystmOne TPP 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.
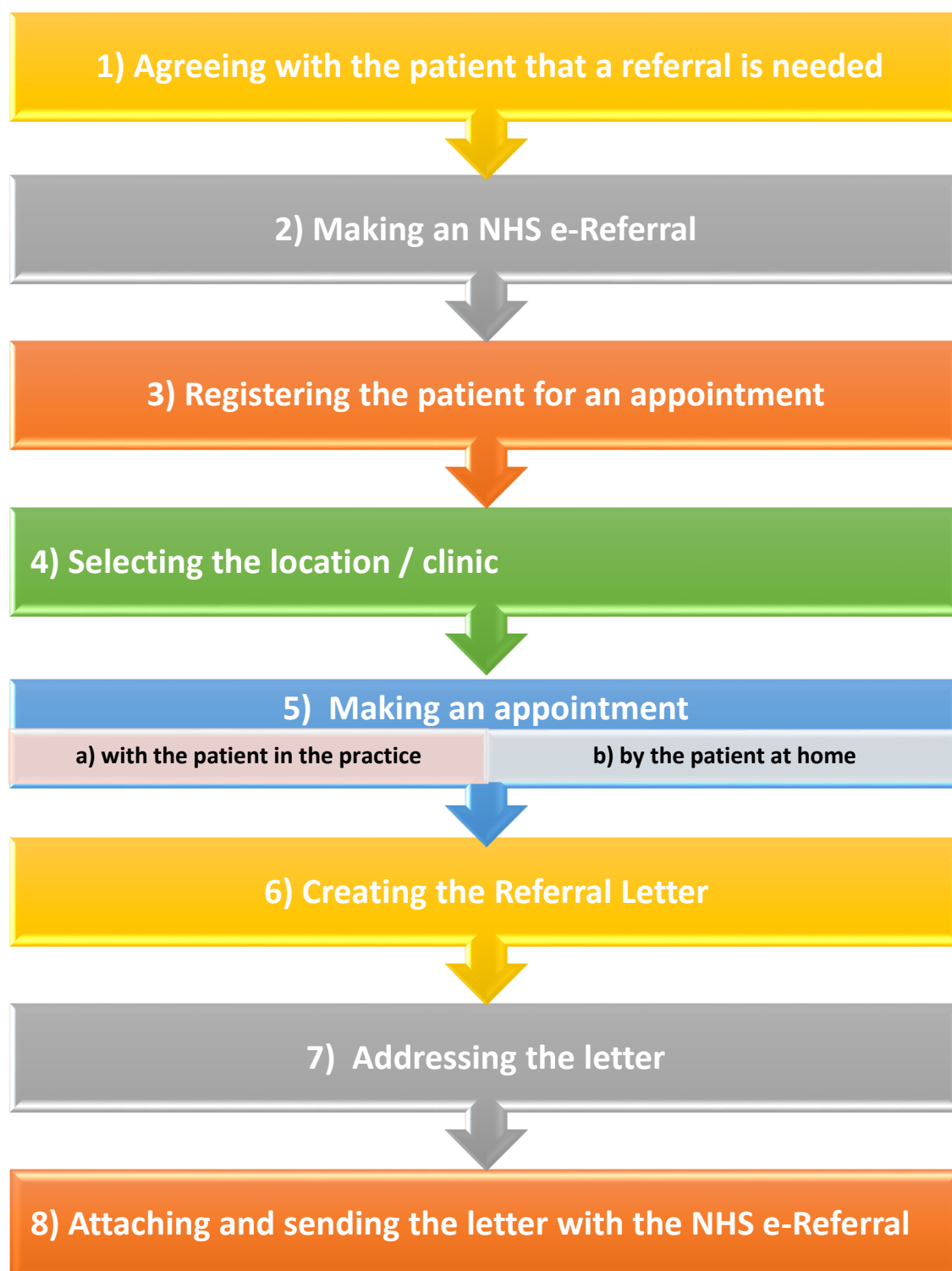
This guidance document provides North West London GP practices with instructions on how to make an NHS e-Referral, create and attach a SystmOne referral letter and monitor your referrals.

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

1.   Initiate a NHS e-Referral within SystmOne TPP
2.   Create a SystmOne Referral Letter
3.   Attach a SystmOne Referral Letter
4.   A report Aid to Monitor Your Referrals

NHS
North West London

Flow Chart for NHS e-Referrals

1) Agreeing with the patient that a referral is needed

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2) Making an NHS e-Referral

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3) Registering the patient for an appointment

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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 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.
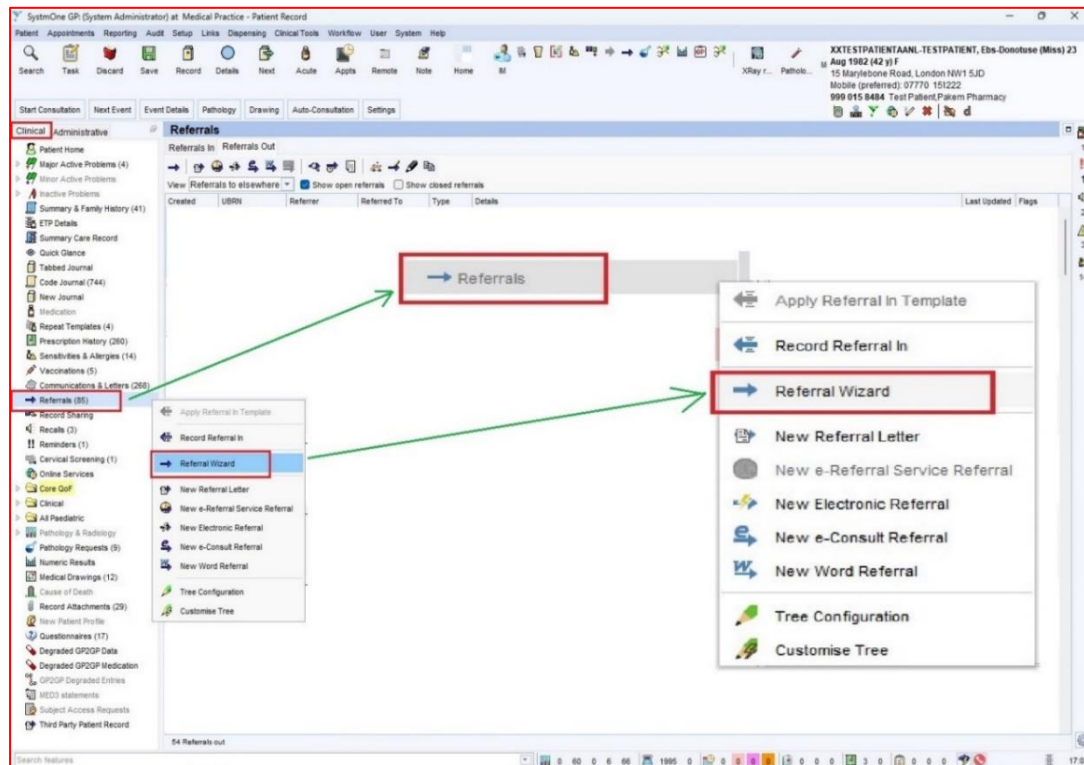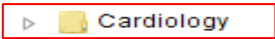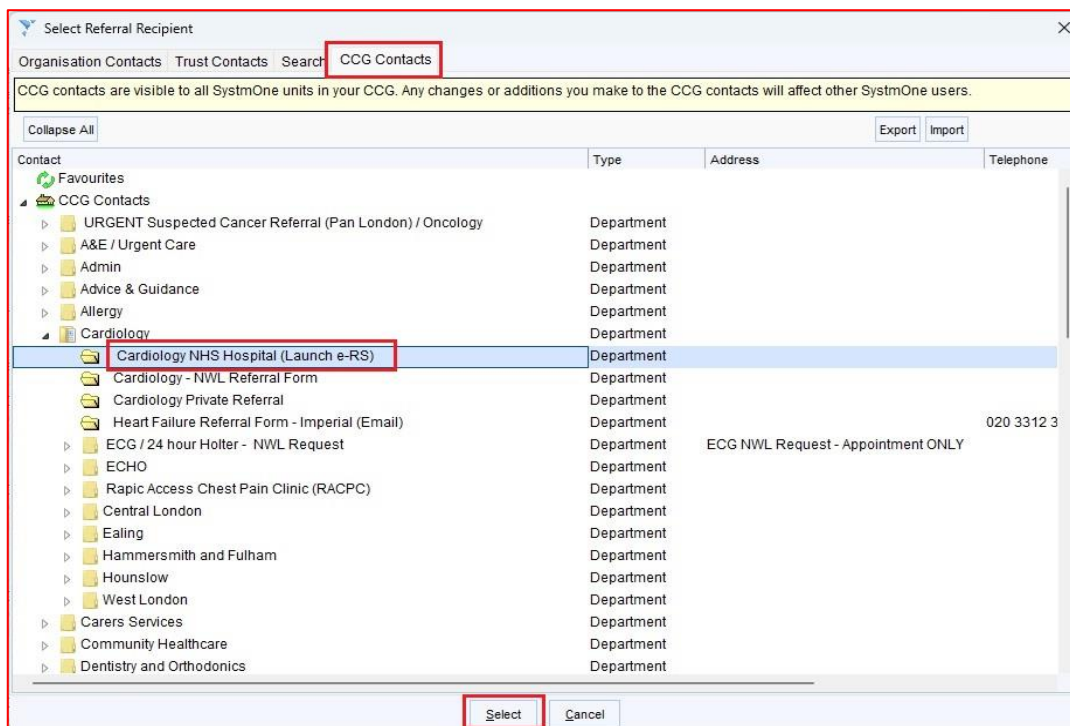

3. Then **'Select Referral Recipient'** dialogue box appears as shown below.

   a. Left Click on '**CCG Contacts'** tab.
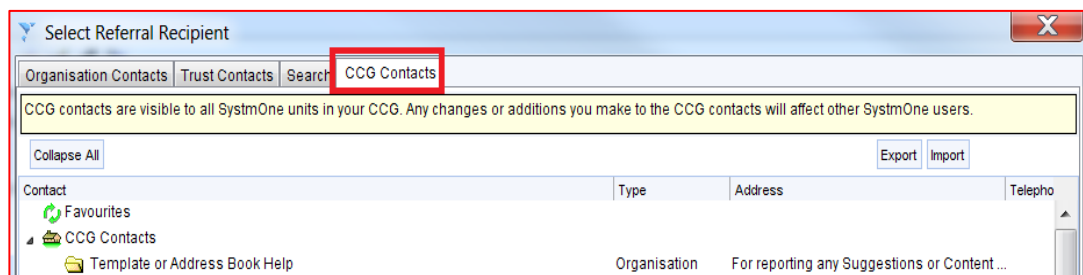
   b. Left click to select the speciality in this case '**Cardiology'.**
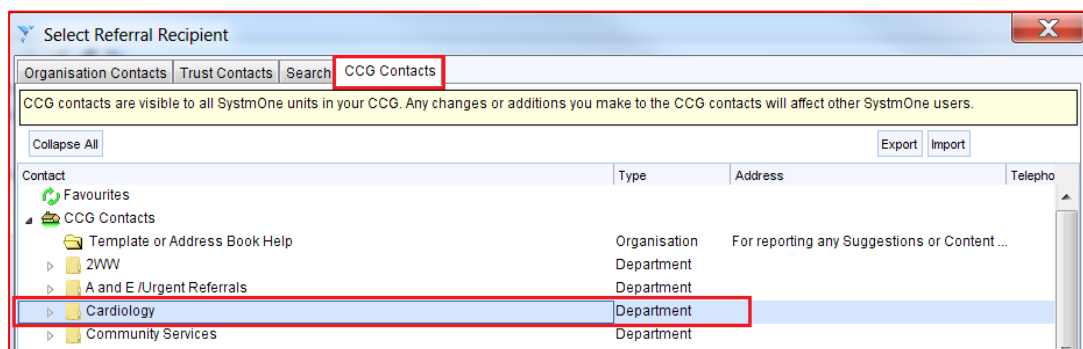
4. **Left Click** on **White Triangle** to expand the Cardiology tree (as shown in the shown in the screen shot below). ▷ 📁 Cardiology

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

6. 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 '**Cardiology NHS Hospital (Launch e-RS)'**. See screen shot below.

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

8. You will see the **'e-referral Service Referral Options'** dialogue box below.
   a. Left click to **select** the **Referring Clinician** from the drop down.
   b. Set the appropriate referral priority either **Routine, Urgent or 2-week wait.**
   c. Click **OK.**

9. The '**Requesting UBRN from Spine**' dialogue box appears as shown below.
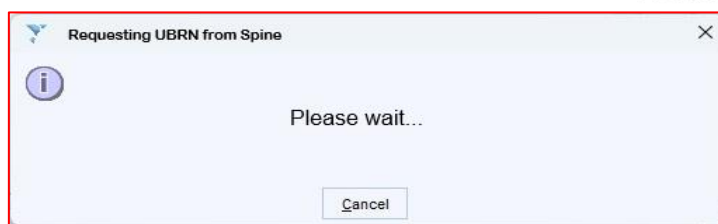
10. The '**New e-Referral Service Referral**' dialogue box appears as shown below.

11. Click on the **Advanced** button and You will see the expanded screen shot below:

12. Add the **Reason for Referral** (in this example we will choose **Assessment**).

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

14. A **Warning** dialogue box appears as shown below. Left Click on **OK.**

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

16. Select **smartcard** option and click **Continue.**

17. The '**Search for a service'** screen will be displayed as shown below.

18. Populate the '**Referring clinician**' field.

19. Choose the appropriate 'Request type' in this case it will be **referral.**
20. The '**Priority'** field should be pre-populated as follows.

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

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

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

24. Select at least **five** (5) services by ticking the Select boxes as shown below [checkbox icon]   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.

25. To ensure the referral meets the criteria click on the **hyperlink** in the service column.1

26. 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.

27. For instructions on creating a **shortlist-only list**, please refer to section "**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.

28. If you would like to make a '**Face-to-Face**' appointment, please refer to section "**II. Make a Face-to-Face appointment**". In this type of booking, the clinician will arrange the patient's appointment directly.

29. To make a '**Triage**' booking, please refer to section "**III. How to Make a Triage Booking**". 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

30. 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.

31. 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

32. Click on **Print patient referral instructions** to send details to the patient for them to book their own appointment.

33. 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.
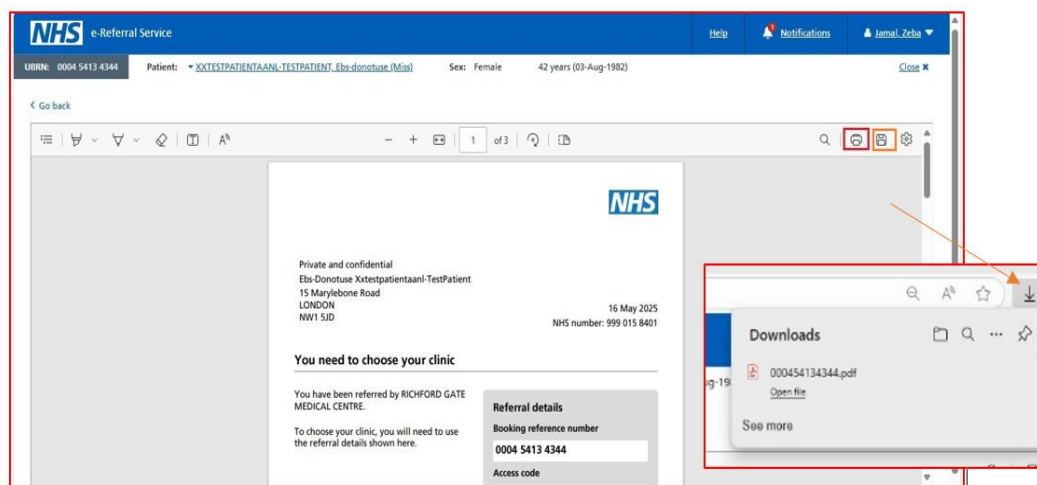
34. If you want to print the Appointment Request Summary to give to the patient for them to go and book their own appointment, then click on the **printer** symbol.

35. A letter is displayed with details for the patient to be able to book their own appointment.
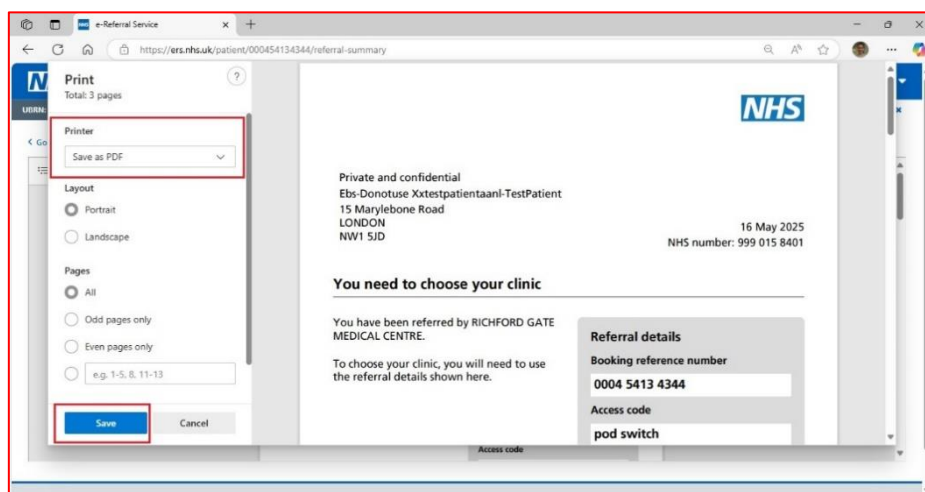
36. Select appropriate printer and **Save**. We have in this example saved to PDF.
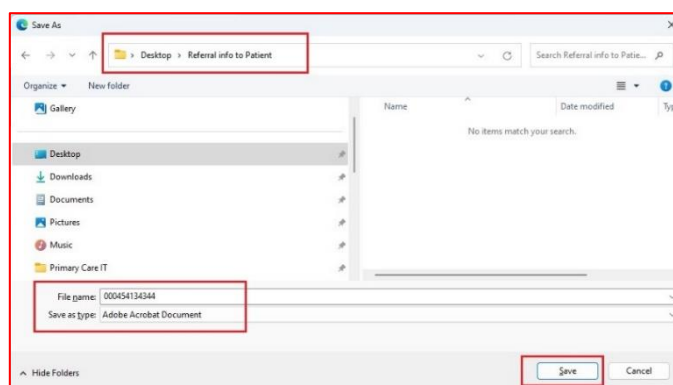
37. Click on the **Close X** hyperlink. Then you can close your browser to end the NHS e-Referral part of the process.
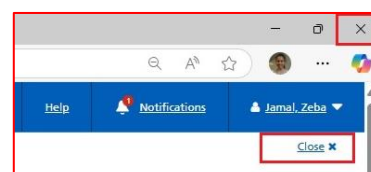
38. The patient will at this point have their booking details on a printout.
39. Now go to **Section Two** (2) **Create a SystmOne Referral Letter:**
    a. Create a task to **'Write the Referral Letter later'.**
    b. To **'Write the Referral Letter Now'.**

II. Make a Face-to-Face Appointment

40. 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:
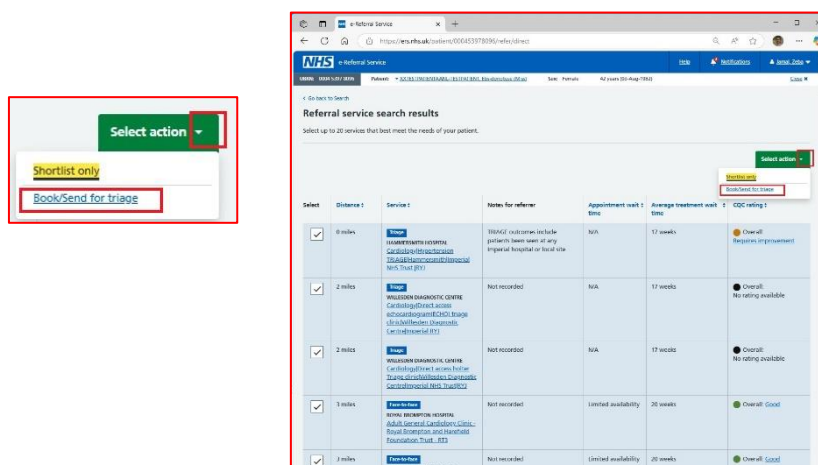
41. You will see the '**Review service options**' Screen as shown below. This will be a list of all the services selected.
42. To review the exclusions, conditions treated and suggested investigations and contact information of the service click on the blue service name
43. To book an appointment click on **select** the appropriate Face to face appointment time.
44. Click on **'Select'** to Choose the appropriate **face-to-face appointment time** from the available options as shown below.
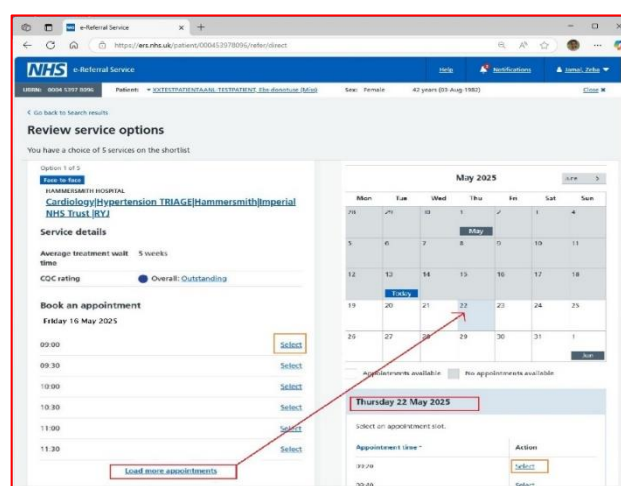
45. Ensure the referral meets the criteria by reviewing the exclusions, conditions treated and suggested investigations by clicking on the service name. This will take you to the Service details page.

46. Click on **Book appointment.**
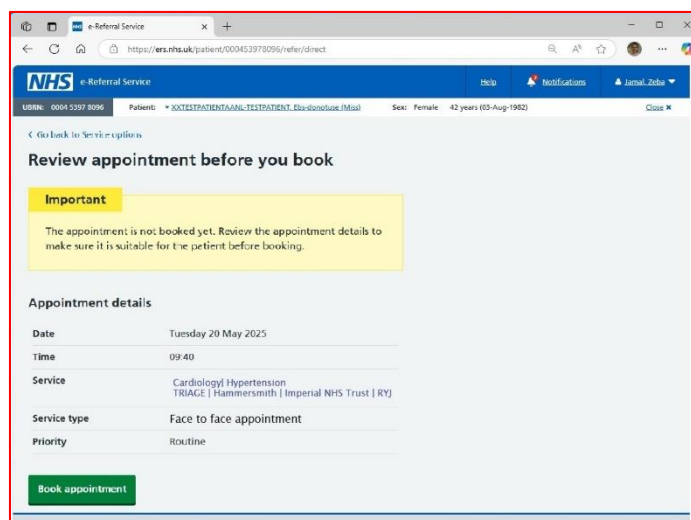
47. If the patient has a verified email address select **email the patient the appointment details** by clicking on the hyperlink below. If you need to print out the appointment click on the **Print patient appointment details** hyperlink. The patient will at this point have their appointment details on a printout or via email.
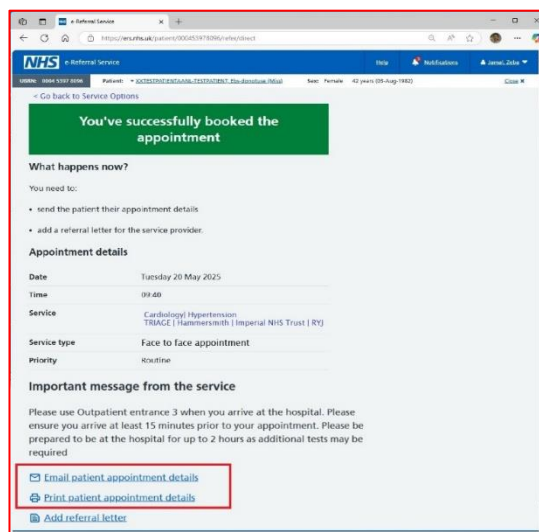
48. If you have a large **file greater then 5MB in total to attach,** then you can do this here.

   Otherwise there are two (2) options available at this point.
   a. Create a task to **'Write the Referral Letter later'**.
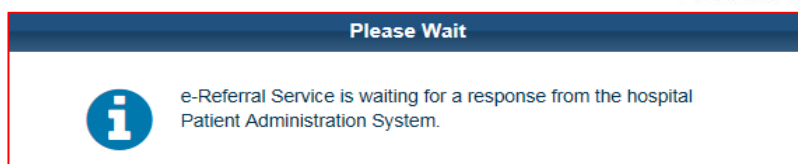   b. To 'Write the Referral Letter Now'.

III. Make a Triage Appointment

49. 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:


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

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

52. If the patient has a verified email address **email patient the referral instructions** by clicking on the hyperlink below.
53. 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.
54. If you have a large **file greater then 5MB in total to attach,** then you can do this here.
55. Otherwise there are two (2) options available at this point.
56. Create a task to **'Write the Referral Letter later'**.
57. To **'Write the Referral Letter Now'**.
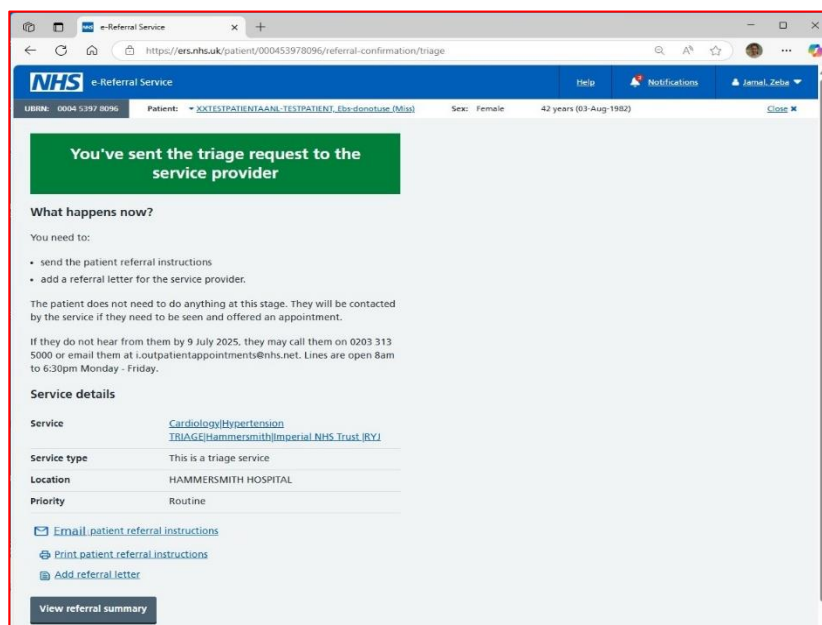
Section 2: Create a SystmOne Referral Letter

58. In order to create the referral letter, you can either create a task to write later (see option 1 below) or write the referral letter now.

I.   Option 1 - Create a task to write the Referral Letter later

59. Click on **'Create Task to Write Later'** button, which allows you to create a 'NHS e-Referral to Finish' task as a reminder to complete the referral later (the task will be created when you save the patient record). When you action the task, you will be taken to the Amend Referral Details dialog. Click **Continue Writing** to go to the NHS e-Referral screen and complete the referral.

60. Click **OK.**
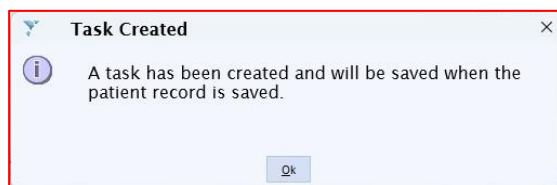
61. Click **Save**.
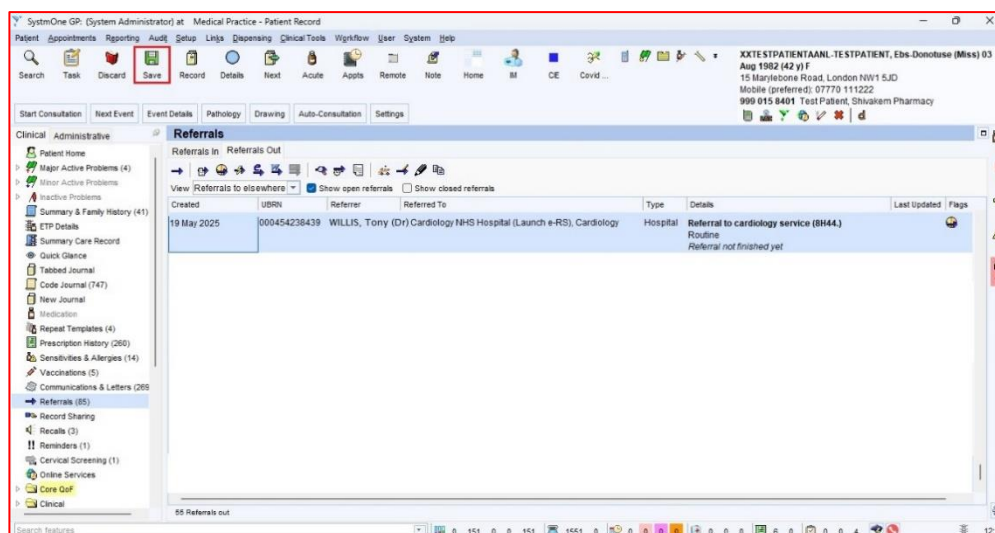
62. A task has been created successfully to complete the letter at a later time.

II.   Completing the Referral letter from task

63. Navigate to the patient's home screen.

64. Open the patient's record. Within the open patient record, left click on **'Referrals'** in the clinical tree to go to the referrals page.
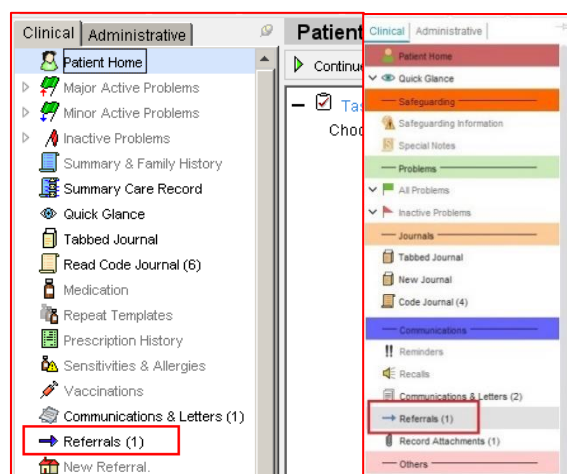
65. Then select the appropriate referral (in the example below **'Referral to cardiology service'** is highlighted).
    a. Left click on the **'Amend Content'** sub-menu option, as shown in the screen shot below.
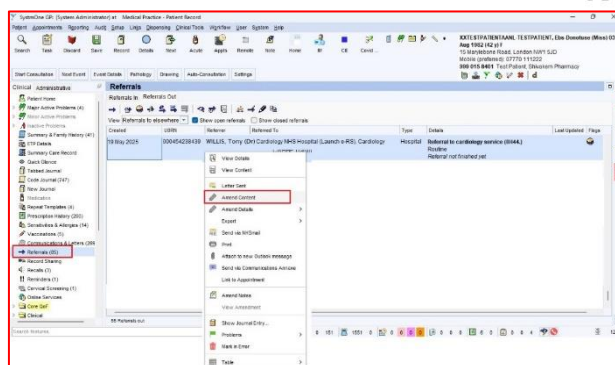
66. Left click on '**Continue Writing'** button, as shown in the screen shot below.
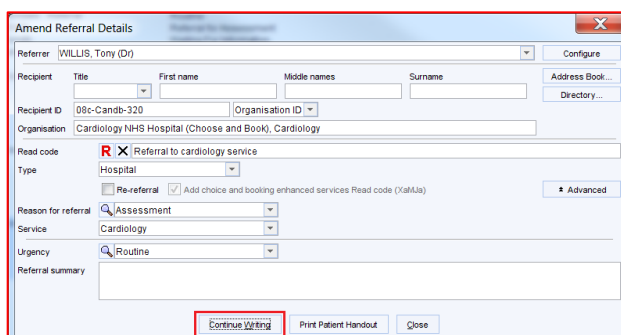
67. The '**e-Referral Service Referral**' dialogue box is displayed. Go to the next section, point 68 of the guide to complete the letter.
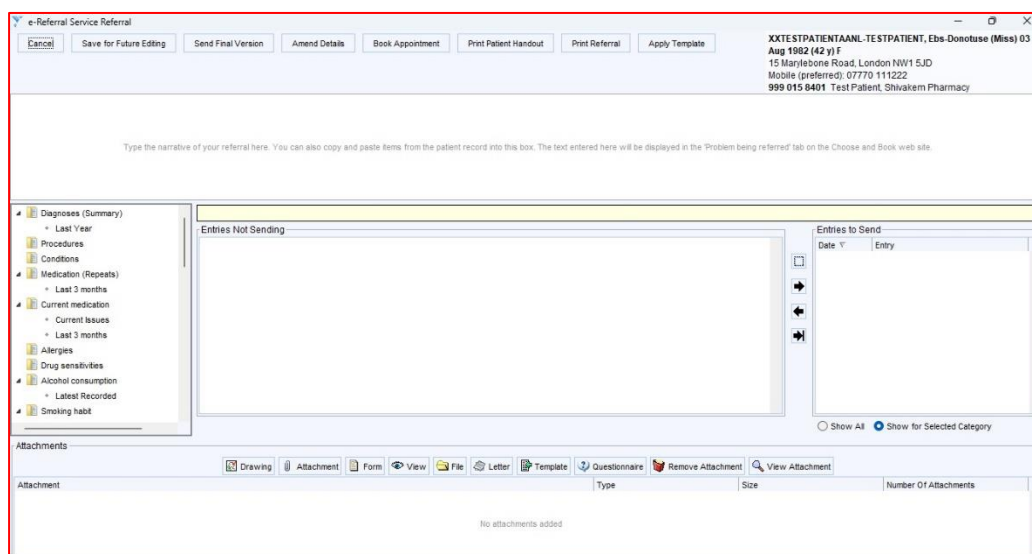
III.   Option 2 - Write the Referral Letter now

68. The appointment booking process has been completed. After this, the SystmOne screen will be displayed as shown below, to complete the letter.
69. Click on **'Write Now'** button to write the referral letter now.

70. The 'e-**Referral service referral**' screen is displayed as shown below.
71. Click on '**Letter'** button.

72. The '**Attach Letter**' dialogue box is displayed.
73. Click on **'New'** button.

74. The **'Select Sender & Recipient Type'** Dialogue box is displayed.
75. Click on the relevant radio button. In the example below the options chosen are:
    a. Sender - **Patients usual GP**
    b. Recipient – **An entry in the address book**
    c. Click on **OK**

Please Note:

The options can be saved by clicking on the **Save as Default** button.

76. The Select Recipient dialogue box is displayed. The example below shows cardiology department is selected.
77. Click on the **'Select'** button.

78. 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 **'Referral'**.
    c. Click on **'Save as Default'** button. To keep this option for future referrals.
    d. Click on **'MS Word'** radio button.
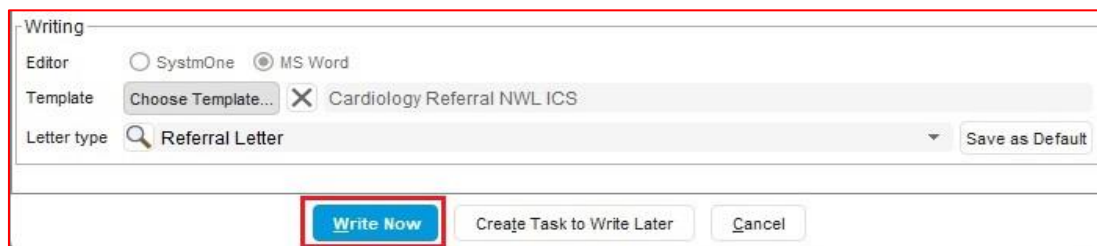   e. Click on **'Choose Template'** button.

79. The **'Choose a Letter Template'** dialogue box is displayed as shown below.
    a. Expand **Cardiology folder.**
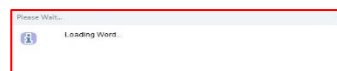
b. Look for **Cardiology Referral NWL ICS and** Select it, as highlighted below.

c. Click **OK.**
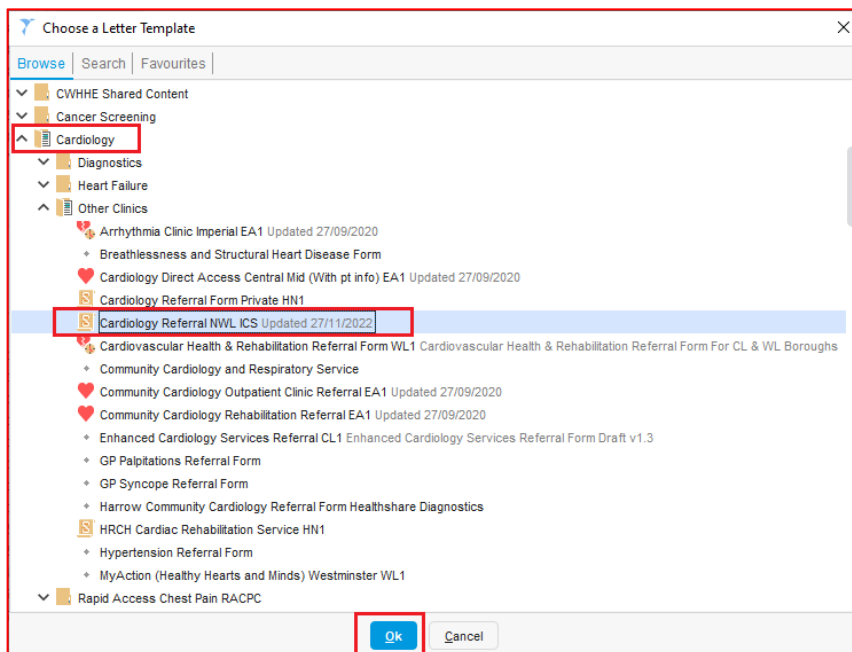
d. The **'New Letter Template'** dialogue box will be displayed again.

e. Click on the **Write Now** button at the bottom of the screen.

f. A **'SystmOne'** dialogue box with 'Loading Word…' will be displayed.

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

a. Edit referral letter as required.

b. Click on **'Save Final Version'** button.
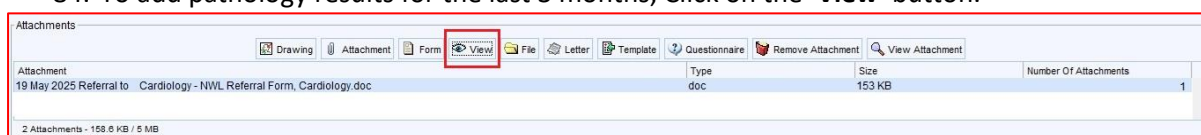
Section 3: Attach a SystmOne Referral Letter

81. The **Attach Letter** dialogue box will be displayed again the new referral letter will be highlighted in blue as shown below.
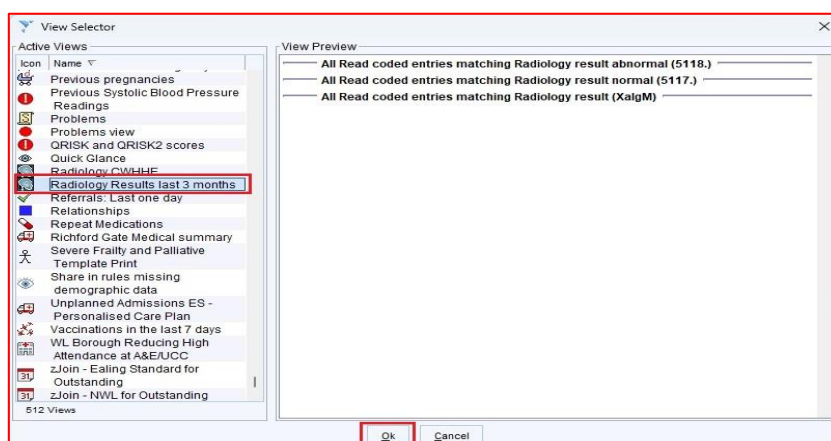82. Click on the **Attach** button.

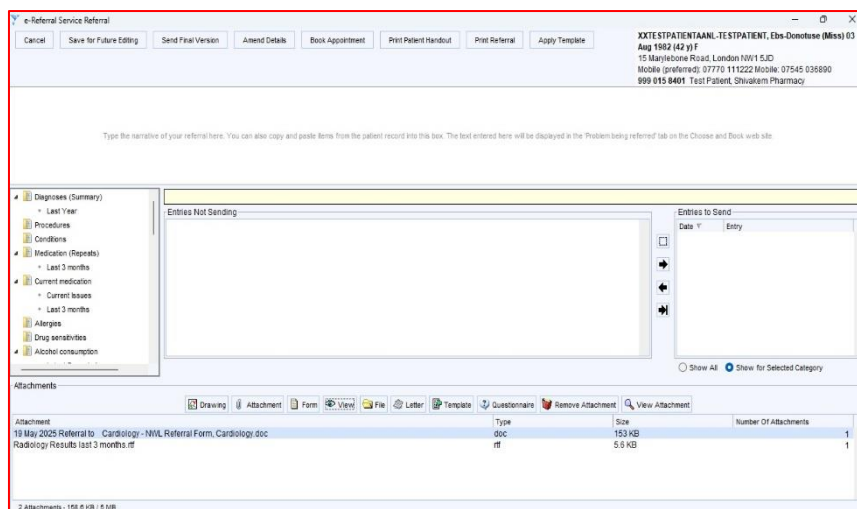83. The **'e-Referral Service Referral'** screen is displayed
84. To add pathology results for the last 3 months, Click on the '**View**' button.

85. The '**View Selecto**r' screen will be displayed. Scroll down until you see the view name **Radiology Results last 3 months.** Select it and click **OK.**

86. The 'e-**Referral service referral**' screen is again displayed as shown below. This time it will have the referral letter created along with the 3 months' pathology results for the patient.

87. To add attachments, click on the **Attachment** button.

88. The **'Select Attachment'** dialogue box will be displayed.
    a. Select the required file/s
    b. Click on **Attach**

89. The **'e-referral Service Referral'** dialogue box will be displayed. The attachments pane now displays some attachments from the patient record, like hospital scanned in referral letters and the selected attachment/s (such as a scan, x-ray or blood result etc.).

90. If you need to remove any attachments from this screen, highlight the item to remove and then click on the **remove attachment** button as shown. This will remove the item from your final list of attachments to be sent.

91. Once you have all the necessary documentation, click on **'Send Final Version'.**

92. The **Question** dialogue box will be displayed.
    a. Click on **Yes.**

93. The **information** dialogue box will be displayed.
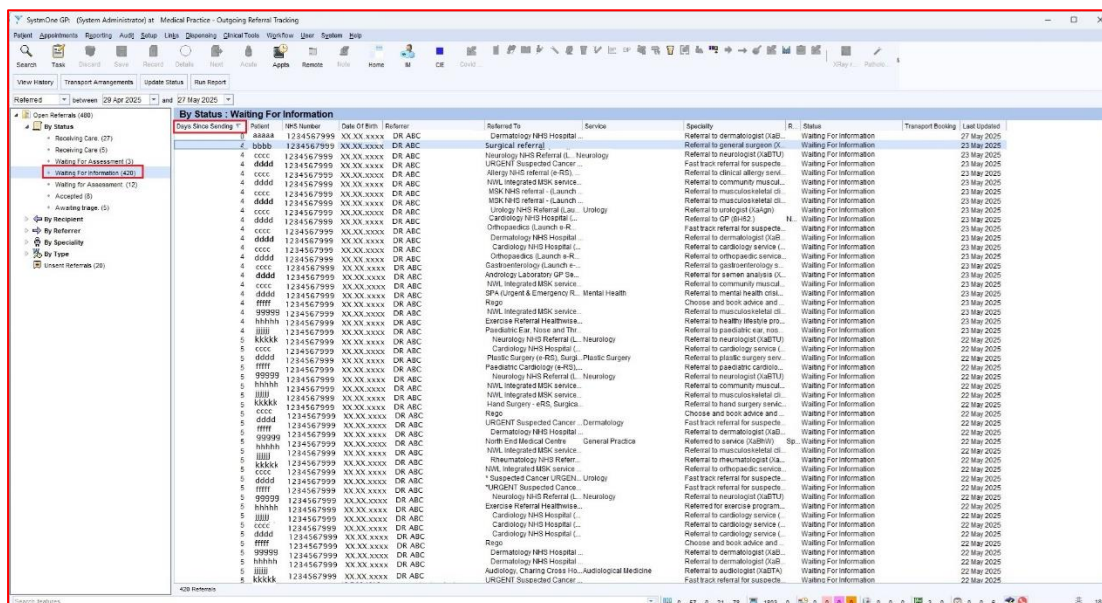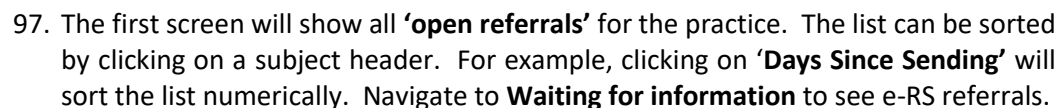   a. Click on **OK.**

94. The **Referrals** screen will be displayed in SystmOne.
95. Click on **Save** to save the patients record and the referral will be sent.

This completes the NHS e-Referral process within SystmOne.

Section 4: A Report Aid to Monitor Your Referrals

96. To navigate to Referral Tracking in SystmOne, follow the steps below:
    a. Select **Reporting** from the Menu
    b. Select **Referral Tracking**
    c. then Select **Outgoing Referral Tracking**

97. The first screen will show all **'open referrals'** for the practice. The list can be sorted by clicking on a subject header. For example, clicking on '**Days Since Sending'** will sort the list numerically. Navigate to **Waiting for information** to see e-RS referrals.

I.   Checking Outgoing Referrals over a Period of Time

98. To see outgoing referrals for a specific period in time, the search section must be used to specify dates. In the example below, referrals made between 29th April 2025 to 27th May 2025 have been selected.

99. Once selected left click on **Run Report**.

Glossary

    a. Number of choices
    We are asking all referrers to ensure they shortlist on average five 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/