

2025

SystmOne e-RS Referral Worklist

USER GUIDE

PRIMARY CARE SYSTEMS TRAINING TEAM

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Introduction

The purpose of this document is to support and assist GP practice staff across North West London in effectively monitoring and managing their **e-Referral Service (e-RS) Worklists** on a regular basis. It serves as both a practical guide and a reference resource, outlining key processes for maintaining e-RS Worklists and ensuring timely action on referrals.

If you have any questions not covered in this guide, you are encouraged to contact the **NWLCCG Service Desk Team** directly:

- 📞 Telephone: 0203 350 4050
- ✉ Email: nwlccg.servicedesk@nhs.net
- IT Self Service Portal :

Note: This is a working document that will be updated in the event of when new situations or scenarios emerge or when further clarification is needed.

What is e-RS?

The NHS e-Referral Service (e-RS) is a secure electronic system that enables GP practice staff to refer patients to other healthcare providers. It integrates with Spine information and can connect with other clinical systems.

The **e-RS Worklist** is the central hub where practice staff can:

- Monitor incoming and outgoing referrals
- Action items such as triage responses, incomplete referrals, and advice requests
- Track referral statuses including cancellations, DNAs, and pending bookings

Important Reminder

Making a referral is the responsibility of the **referring clinician**, who together with the patient must determine the most clinically appropriate referral option and onward pathway.

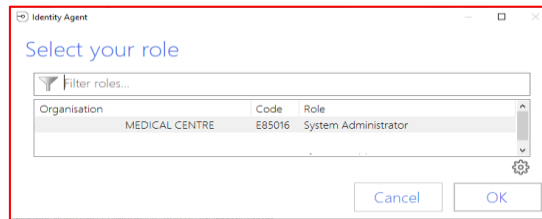
GP practices across North West London are responsible for the **daily management of their NHS e-Referral Service (e-RS) Worklists**. Regular monitoring and timely action are essential to ensure safe and efficient referral handling.

Daily Worklist Management

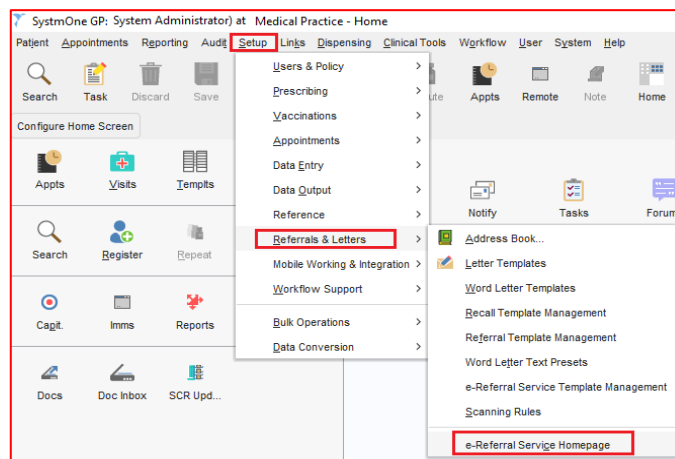
- Practices **must review their e-RS Worklists daily** and take appropriate action on any outstanding referrals.
- Each Worklist **must be monitored, reviewed, and actioned** in line with the referral's status and history.
- Available actions for each referral will vary depending on its progress and previous activity.

Accessing the e-RS website

1. **Log in using your NHS Smartcard.** Select the role of the organisation you will be working on if you have more than one smartcard role.

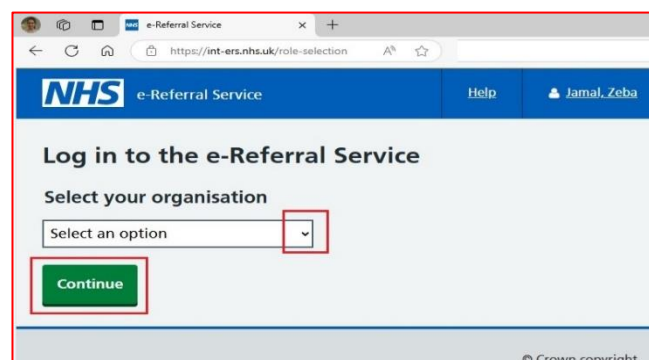


2. Open the e-RS website using **Microsoft Edge** (not Chrome) by either clicking on :
 - a. **Website Hyperlink:** <https://ers.nhs.uk/role-selection>
 - b. **e-RS Icon** on the desktop :
 - c. Or in **SystemOne** navigate from the top menu:
 - i. **Setup → Referrals & Letters → e-Referral Service Home Page**



Tip: Ensure your Smartcard has the correct referrer role assigned. Your practice manager can request this via the Registration Authority (RA) team using the RA02 form.

3. You will see the e-RS login screen. Use the **drop down arrow** to select your organisation

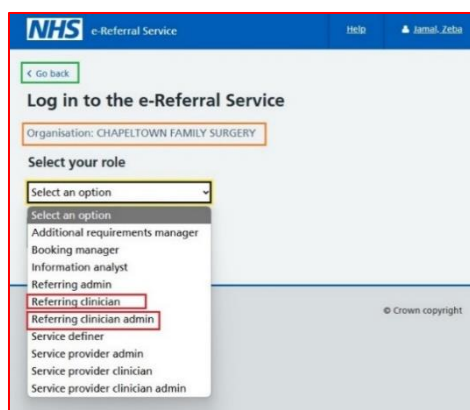


4. Once you have chosen your organisation, in this example we are choosing CHAPELTOWN FAMILY SURGERY then click on **Continue**.



5. You now need to select your role. There are **two main roles** you might need, depending on your responsibilities:
 - a. **Referring Clinician** – typically for GPs or clinical staff making referrals
 - b. **Referring Clinician Admin** – for administrative staff managing referrals on behalf of clinicians

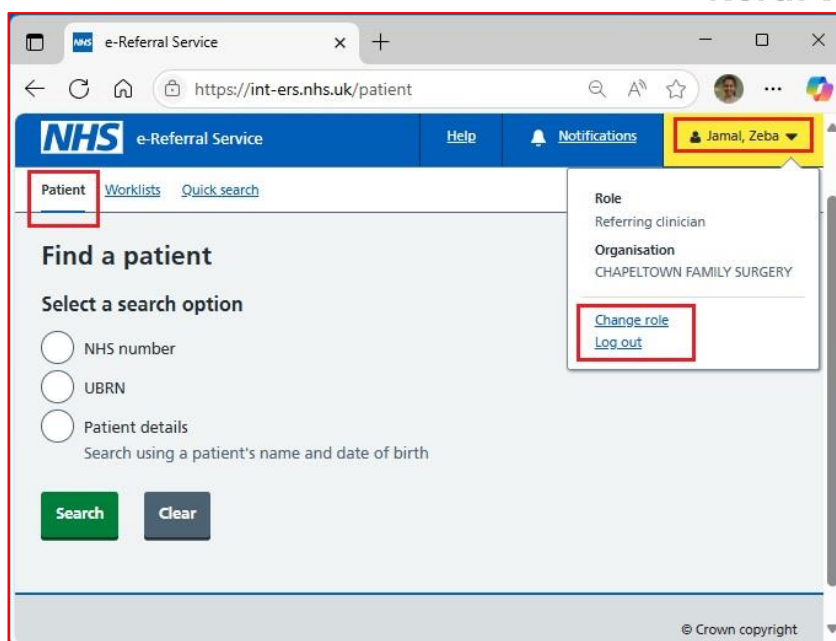
Choose the appropriate role and click on **Continue**.



6. You have now successfully logged into the e-RS system and will be presented with the home screen.

Patient Tab

7. Upon logging into the e-RS website, the default screen displayed is '**Find a Patient**,' which corresponds to the '**Patient**' hyperlink.
8. There is a blue underline beneath the '**Patient**' label on the grey navigation ribbon at the top of the screen. This blue line will indicate which part of the website you are visiting.



9. Under the users name there is a drop down that, you can expand.
 - a. This tells you what **Role** you are currently logged in as on the website. Displayed on screen is the **referring clinician** role.
 - b. The other role is Referring Clinician Admin. This also shows the **Organisation** you have accessed.
 - c. The options you can perform are changing your role, if you have access to multiple roles on e-RS or if you want to log off from the website.
10. The **Patient tab** is a useful tool that allows the user to **search for a patient's referral activity**. This is to give the user quick access to a patient's referral history, which has been active within the **last 18 months**. You can search for a patient using one of the following ways their **NHS number**, a **Unique Booking Reference Number (UBRN)** or their **demographic information**, such as name and date of birth. This feature is especially helpful when you need to **track down a referral** that may not appear in your usual worklist or when following up on a patient query.

You now have three options available to search for your patient:

Find a patient using NHS Number

- a. Click on the **Radio button NHS Number**.
- b. Type or paste in the patients **NHS Number**.

- c. Click on **Search**.

Find a patient

Select a search option

☒ NHS number

NHS number
This is a 10-digit number. For example, 485 777 3456

☐ UBRN

☐ Patient details
Search using a patient's name and date of birth

Search **Clear**

- d. In the example below, the patient did not have any referrals made, therefore the patient activity is empty.
- e. To go back to the previous screen click on **< Go Back** hyperlink at the top left hand corner of the screen. You can also click on the **Patient** hyperlink shown at the top of the screen on the blue bar.
- f. To go **back to the top** of the screen click on **Back to top** hyperlink located at the bottom left hand corner of the screen.
- g. Click on the **Clear** button to remove the information in order to search again

Search results

GREENE, Willis Damien (Mr)

[Update patient and contact details](#)

Patient details

| | |
|----------------------|-------------------------------------|
| NHS number | 973 437 1215 |
| Date of birth | 26 August 1952 |
| Age | 72 years |
| Sex | Male |
| Address | 153 STREET LANE LEEDS LS8 1AA |
| Access Code | magazine tack |

[See patient contact details](#)

Refer or seek advice

Patient activity

There are no active referrals or advice and guidance requests for this patient

Last updated: 08-Apr-2025 11:13 [Refresh](#) [View archived referrals](#)

[Back to top](#)

Find a patient

Select a search option

☐ NHS number

☐ UBRN

☐ Patient details
Search using a patient's name and date of birth

Search **Clear**

Find a patient using UBRN – Unique Booking Reference Number

11. Click on the Radio button **UBRN** - Unique Booking Reference Number.
- a. Type or paste in the Patients **UBRN**.

b. Click on **Search**.

Find a patient

Select a search option

☐ NHS number

☒ **UBRN**

UBRN
This is a 12 digit number. For example, 0000 4914 5986.

☐ Patient details
Search using a patient's name and date of birth

Search **Clear**

c. This example it shows that one referral was made at the bottom of the screen

Search results

GREENE, Willis Damien (Mr)

[Update patient and contact details](#)

Patient details

NHS number: 975 437 1215

Date of birth: 26 August 1952

Age: 72 years

Sex: Male

Address: 153 STREET LANE, L6 2DS, L5B 1AA

Access Code: magazine tack

[See patient contact details](#)

Refer or seek advice

Patient activity

Select a UBRN for more information

Last updated: 08 Apr 2025 13:48 [Refresh](#) [View archived referrals](#)

| UBRN | Clinical context | Request type | Request date | Status | Appointment | Referred by |
|--------------------------------|-----------------------|--------------|--------------|--------|-------------------|-------------|
| 0000 4980 0907 | Cardiology/Arrhythmia | Referral | 08-Apr-2025 | Booked | 16-Apr-2025 14:00 | JAMAL, Zeba |

Find a patient using Patient Details

12. Click on the Radio button **Patient Details**.

- Type or paste in the Patients information.
- Click on **Search**

The screenshot shows the NHS e-Referral Service interface. The 'Patient' tab is active. The 'Find a patient' section has three radio buttons: 'NHS number', 'UBRN', and 'Patient details'. The 'Patient details' option is selected and highlighted with a red box. Below the radio buttons, there is a text input field for patient details and a 'Search' button, which is also highlighted with a red box.

c. This example shows the fields that need to be filled out.

The screenshot shows the 'Search for a patient' form. It includes fields for 'First name', 'Last name', 'Date of birth' (with 'Exact date' selected and a date picker showing 14 02 1973), 'Sex of patient' (with 'Male' selected), and 'Postcode (optional)' (with 'SE26 6QL' entered). There is also a 'Registered practice (optional)' section with a search link. The 'Search' button is highlighted with a red box.

d. This example below shows the populated fields.

Search for a patient

First name
Willis

Last name
GREENE

Date of birth
☒ Exact date
 Date of birth
 For example, 14 02 1973
 Day Month Year
 26 08 1952
 or
☐ Date range

Sex of patient
 As registered in the system
☒ Male
☐ Female
☐ Intersex
☐ Not recorded

Postcode (optional)
 For example, SE26 6QL

Registered practice (optional)
[Search for a practice](#)

e. This example shows the patient did not have any prior referrals

e-Referral Service

<https://int-ers.nhs.uk/patient>

NHS e-Referral Service [Help](#) [Notifications](#) [Jamaal Zaba](#)

[Patient](#) [Worklists](#) [Quick search](#)

[Go back](#)

Search results

GREENE, Willis Damien (Mr)

[Update patient and contact details](#)

Patient details

NHS number 973 437 1215

Date of birth 26 August 1952

Age 72 years

Sex Male

Address 153 STREET LANE
LEEDS
LS8 1AA

Access Code magazine tack

[See patient contact details](#)

Patient activity

There are no active referrals or advice and guidance requests for this patient

Last updated: 08-Apr-2025 11:28 [Refresh](#) [View archived referrals](#)

[Back to top](#)

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13. This example shows how to update the patient and their contact details. Click on the hyperlink **Update patient and contact details**.

e-Referral Service

<https://int-ers.nhs.uk/patient>

NHS e-Referral Service [Help](#) [Notifications](#) [Jamaal Zaba](#)

[Patient](#) [Worklists](#) [Quick search](#)

[Go back](#)

Search results

GREENE, Willis Damien (Mr)

[Update patient and contact details](#)

Patient details

NHS number 973 437 1215

Date of birth 26 August 1952

Age 72 years

Sex Male

Address 153 STREET LANE
LEEDS
LS8 1AA

Access Code magazine tack

[See patient contact details](#)

Patient activity

Select a UBRN for more information

Last updated: 08-Apr-2025 13:48 [Refresh](#) [View archived referrals](#)

| UBRN | Clinical context | Request type | Request date | Status | Appointment | Referred by |
|----------------|-----------------------|--------------|--------------|--------|-------------------|--------------|
| 0000_0980_0902 | Cardiology/Arrhythmia | Referral | 08-Apr-2025 | Booked | 16-Apr-2025 14:00 | JAMMAL, Zaba |

14. This screen shows where the user can make amendments.

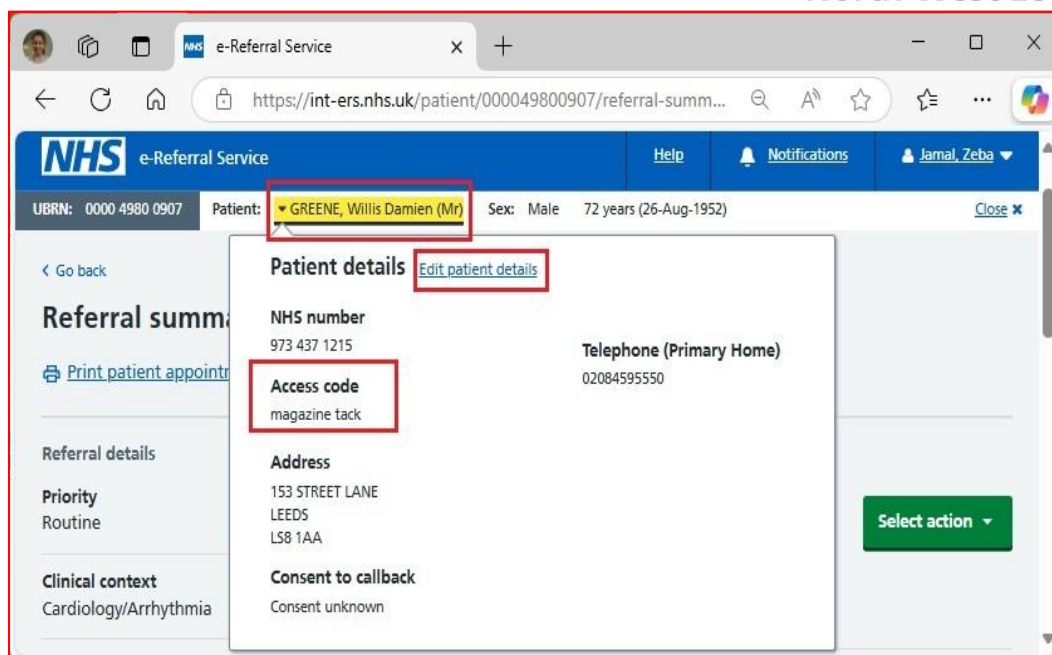
The screenshot shows the 'Update patient details' page in the NHS e-Referral Service. The patient's name is GREENE, Willis Damien. The 'Patient information' section is expanded, showing fields for Title (optional), First name, Middle names (optional), Last name, Date of birth, and Sex on NHS record. The 'Address', 'Contact details', and 'Access code' sections are collapsed. A red box highlights the '+' symbol next to the 'Access code' section.

15. The user can expand the fields by clicking on the '+' symbol.

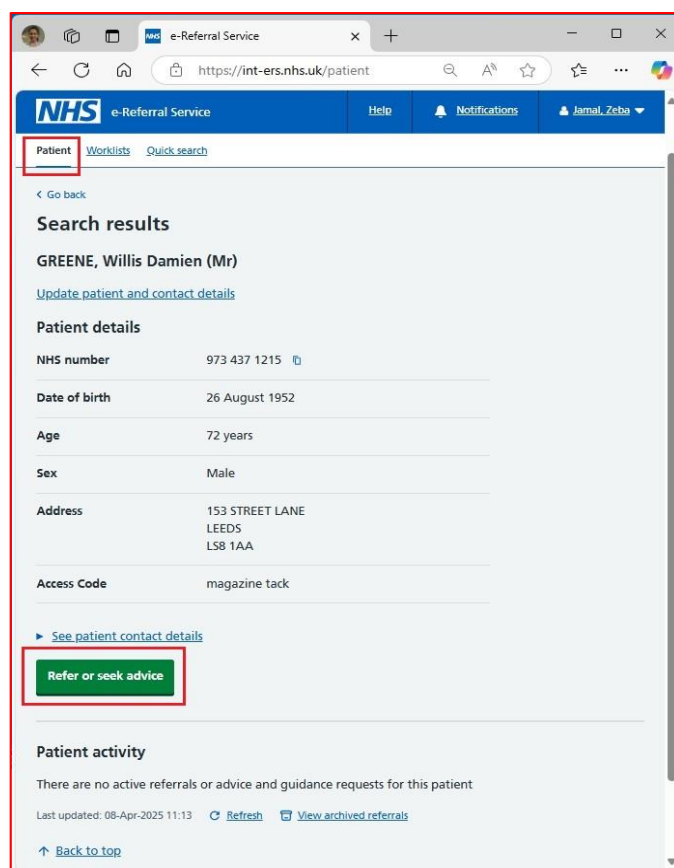
16. The example below shows how to find the **Access code**, which the patient will need to book, amend or cancel their appointment. The user can also **generate a new code** for the patient.

The screenshot shows the 'Access code' section expanded. It displays the 'Current access code' as 'magazine tack' and a 'Generate new code' button. Below this is the 'Contact preferences' section, which is also expanded. At the bottom, there are 'Save changes' and 'Discard changes' buttons, and a 'Back to top' link.

17. The patient details are also available to amend on the referral summary screen at the top under the NHS e-Referral service logo.



18. The user can also refer a patient from the patient search results screen. By clicking on the **Refer or seek advice** button.



19. This will take the user to the **search for a service** screen.

Go back

Search for a service

Step 1: Confirm request details

Referring clinician
Select an option

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
Select an option

Named clinician
[Search for a clinician](#)

Add more search detail +

[Search](#) [Reset](#)

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Worklists Tab (Hyperlink)

Worklists tiles

The Worklists tab in e-RS is your central dashboard for managing patient referrals. Each referral is assigned a Unique Booking Reference Number (UBRN) and grouped into categories based on its status or required actions—such as **“Awaiting Triage,”** **“Letter Required,”** or **“Ready to Book.”** This dynamic tool allows practices to track referral progress, identify missing documents, and take timely action. Regularly checking and updating the Worklist ensures safe patient care, improves team coordination, and supports continuity across services.

Manage your worklists

Select a worklist to review outstanding tasks.

Last updated: 16-May-2025 16:26 [Refresh](#)

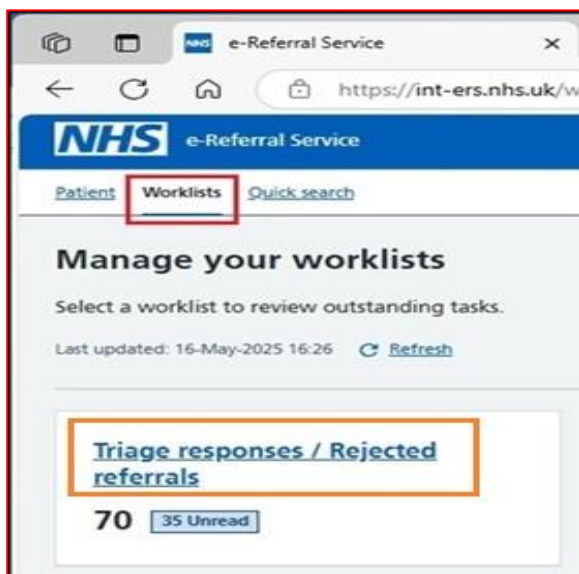
| | | |
|---|---|---|
| Triage responses / Rejected referrals 70 35 Unread | Missing referral letters 82 76 Overdue | Incomplete UBRNs 0 |
| Active advice requests 175 133 Unread | Assessment results / Cancelled referrals / Did not attends 17 6 Unread | Referrals pending external action 112 |

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Using and Navigating the Worklist

The Worklist offers powerful features to help you manage referrals efficiently. You can filter by specialty, urgency, or referral status, and sort by date or team assignment. Clicking on a referral lets you view patient details, upload documents, book appointments, and add notes for team visibility. Multiple users can access and update the Worklist, promoting shared responsibility and smooth handovers. To begin, log in to e-RS, navigate to the **Worklist tab**, and select the relevant category such as **Rejected / Triage Response**, to review and action referrals.

- Actioning Triage Responses and Rejected Referrals



The **Rejected / Triage Response** tile highlights referrals that have been rejected or returned with clinical advice. These require prompt follow-up to prevent delays in care. You can read the reason for rejection, check for missing documents, and decide whether to revise, resubmit, or escalate the referral. Best practice includes checking this tile daily, documenting actions taken, and coordinating with your team. This ensures that patients receive timely updates and that referrals are processed efficiently and safely.

When you click on to the hyperlink **Triage Response / Rejected referrals** you will see responses of referrals from the provider to your practice that are either rejected or returned with clinical advice as per screen shot below:

| UBRN | Patient name | Priority | Clinical context | Status | Reason | Referrer |
|----------------|----------------------------|----------|---|-----------------|------------------------------|----------------|
| 0000.4979.5785 | RODDA, Anna (Mrs) | Routine | Ear, Nose & Throat/Ear | Triage response | Not recorded | MAIN, Rachel |
| 0000.4979.6566 | BAILEY, Greg Harley (Mr) | Routine | Cardiology/Arrhythmia | Rejected | Further information required | ROUSE, Preeti |
| 0000.4979.6589 | DOPSON, Alison (Ms) | Routine | Children's & Adolescent Services/Diabetes | Triage response | Not recorded | ROUSE, Preeti |
| 0000.4979.6591 | BAILEY, Greg Harley (Mr) | Routine | Orthopaedics/Knee | Triage response | Not recorded | ROUSE, Preeti |
| 0000.4979.6911 | WINTER, Elaine Eve (Ms) | Routine | Cardiology/Arrhythmia | Rejected | Further information required | KIZIL, Dilek |
| 0000.4979.7333 | DAY, Doreen Monica (Ms) | Routine | Cardiology/Arrhythmia | Rejected | Inappropriate service | TURNER, Susan |
| 0000.4979.4718 | FRESHO, Glenys Vivien (Ms) | Routine | Cardiology/Hypertension | Triage response | Not recorded | WILDE, Jane |
| 0000.4979.7294 | KNEALE, Bruce Louie (Mr) | Routine | Cardiology/Hypertension | Rejected | Inappropriate service | MORRIS, Sue |
| 0000.4979.7801 | BROUGH, Kieran Sven (Mr) | Urgent | Cardiology/Hypertension | Triage response | Not recorded | MORRIS, Sue |
| 0000.4979.7882 | DAVEY, Yvette Milly (Mrs) | Routine | Cardiology/Hypertension | Triage response | Not recorded | GORDON, Joanna |
| 0000.4979.7824 | MAIN, Dolly (Ms) | Routine | Cardiology/Hypertension | Rejected | Inappropriate service | MORRIS, Sue |
| 0000.4979.7887 | MURTA, Deanna (Mrs) | Routine | Cardiology/Hypertension | Rejected | Inappropriate service | GORDON, Joanna |

20. The darker **blue** bar rows with the **red** dot highlights any new items on the list.

21. To go back to the previous screen click on the hyperlink < **Go back** located at the top left hand corner.

- Download Summary

22. To Download Summary of the referral Click on **Download summary** hyperlink.

Referral summary

[Download summary](#)

[Print patient appointment details](#)

Referral details

Priority: Routine

Clinical context: Cardiology/Arrhythmia

Referred by: JAMAL, Zeba

Referring organisation: CHAPELTOWN FAMILY SURGERY

Patient's registered practice: CHAPELTOWN FAMILY SURGERY

Related information: [Referral history](#)

Status

BOOKED

Service

[Join to face](#)

TD00015 OSSETT TRUST SITE
Arrhythmias and Chest Pain - Cardiology - Ossett Hospital - B0A6

Appointment date

Wednesday 16 April 2025 at 14:00

Notes for patient

Hours of Operation: 8am to 5:30pm Monday - Friday; 9am to 2pm Saturday

Attachments

[Manage attachments](#)

| File | Description | Added by | Date added |
|-----------|--------------|-------------|-------------|
| test.docx | Not recorded | JAMAL, Zeba | 08-Apr-2025 |

Additional requirements

[Update additional requirements](#)

23. The **download summary** shows the clinical information summary of the referral in a separate tab. Save this as a PDF and attach to the patient record.

NHS Confidential

Clinical Information Summary

Patient: GREENE, MR Willis Damian Date of Birth: 26/08/1952

URRN: 0000 4980 0907 Age: 72 years

NHS: 973 437 1215 Sex: Male

URRN Information

Appointment Date/Time: Wed 16-Apr-2025 14:00 Referral Created Date: 08-Apr-2025 11:32

Priority: Routine Clinical Information First Submitted: 08-Apr-2026 16:02

Referred By: JAMAL, Zeba Clinical Information Last Updated: -

Referring Organisation: CHAPELTOWN FAMILY SURGERY

Address: SPENCER PLACE LEEDS WEST YORKSHIRE LS7 4RB

Telephone: 01132407000

Named Clinician: -

Allocated Clinician: KILBRIDE, Zoe (Ms)

Clinical Context: Cardiology/Arrhythmia

Location: TD000215 OSSETT TRUST SITE

Clinical Term: -

Patient Information

Patient Address: 163 STREET LANE LEEDS LS8 1AA

Registered Practice: CHAPELTOWN FAMILY SURGERY

Telephone (Primary Home): 02084595550

Address: SPENCER PLACE LEEDS WEST YORKSHIRE LS7 4RB

More contact details available when reviewing online

Attachments

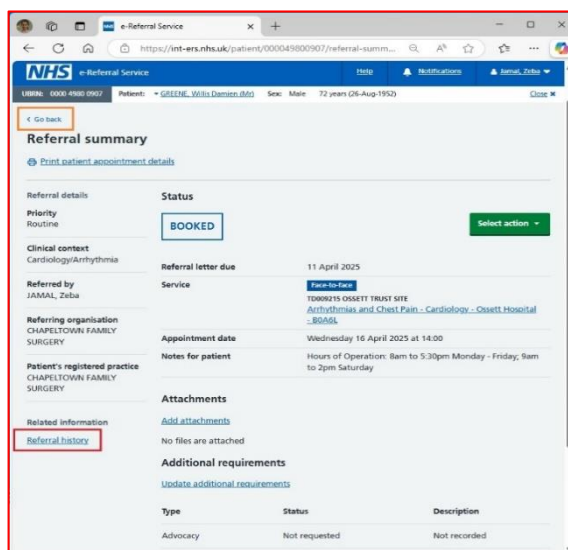
| File Name | File Description | Added By | Date/Time Added |
|-----------|------------------|-----------------------------------|-------------------|
| test.docx | - | JAMAL, Zeba (Referring Clinician) | 08-Apr-2025 15:02 |

CONFIDENTIAL PATIENT INFORMATION

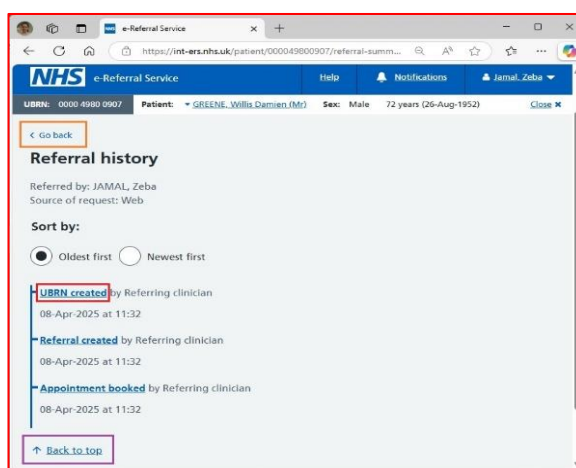
Page 1 of 1

- Referral History

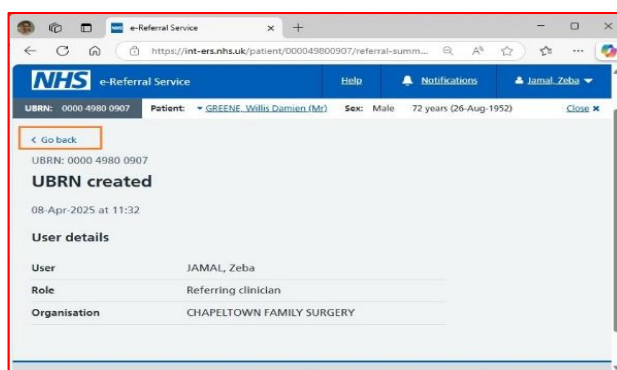
24. To view the referral history, click on **Referral history** hyperlink.



25. **Referral History** view shows more details of selected actions on the middle pane. If you click on the Hyperlink for example **URBN Created** you can view it in more detail. Click on **< Go back** highlighted in Orange to get back to the (previous screen) Referral summary screen or Worklist.



26. The URBN created screen shows more information regarding what actions were done on the referral and who did it and in which organisation.



- Manage attachments

27. To add or remove attachments or letters click on **Manage attachments**.

Referral summary

UBRN: 0000 4980 0525 Patient: BAILEY, Greg Harley (Mr) Sex: Male 66 years (05-Oct-1958)

Referral details

Priority: Routine

Clinical context: Cardiology/Arrhythmia

Referred by: JAMAL, Zeba

Referring organisation: CHAPELTOWN FAMILY SURGERY

Patient's registered practice: CHAPELTOWN FAMILY SURGERY

Related information: [Referral history](#)

Status

AWAITING TRIAGE

Service

SHAW LANE SURGERY (RAS2 Triage request)

Additional information

If the patient does not hear from the service by 28 May 2025, they may call them on 0921000000. Lines are open always.

Attachments

Manage attachments

| File | Description | Added by |
|--|--------------|-------------|
| 000049799131_Appointment_Confirmation_Summary_20250310145723.pdf | Not recorded | JAMAL, Zeba |

Additional requirements

Update additional requirements

| Type | Status | Description |
|----------|---------------|--------------|
| Advocacy | Not requested | Not recorded |

28. Select the file you want to add or remove.

Manage referral attachments

Upload a file

[What type of files can I upload?](#)

Select a file

Attachments

| File | Description | Date added | Action |
|--|--------------------------------------|-------------|------------------------|
| 000049799131_Appointment_Confirmation_Summary_20250310145723.pdf | Add file description | 02-Apr-2025 | Remove |

Save

29. To find more information regarding the Service or contact details click on the Service hyperlink name as highlighted in red below:

Referral summary

UBRN: 0000 4979 9131 Patient: DOTSON, Alison (Ms) Sex: Female 9 years (11-Nov-2019)

Referral details

Priority: Routine

Clinical context: Children's & Adolescent Services/Diabetes

Referred by: ROUSE, Preeti

Referring organisation: CHAPELTOWN FAMILY SURGERY

Patient's registered practice: CHAPELTOWN FAMILY SURGERY

Related information: [Referral history](#)

Status

TRIAGE RESPONSE

Service

COTTINGHAM CHILDREN'S HOSPITAL

Attachments

Manage attachments

| File | Description | Added by | Date added |
|----------------------|--------------|---------------|-------------|
| Referral letter.docx | Not recorded | ROUSE, Preeti | 22-Jan-2025 |

Additional requirements

Update additional requirements

| Type | Status | Description |
|----------|---------------|--------------|
| Advocacy | Not requested | Not recorded |

30. This will show information about the service and their contact details.

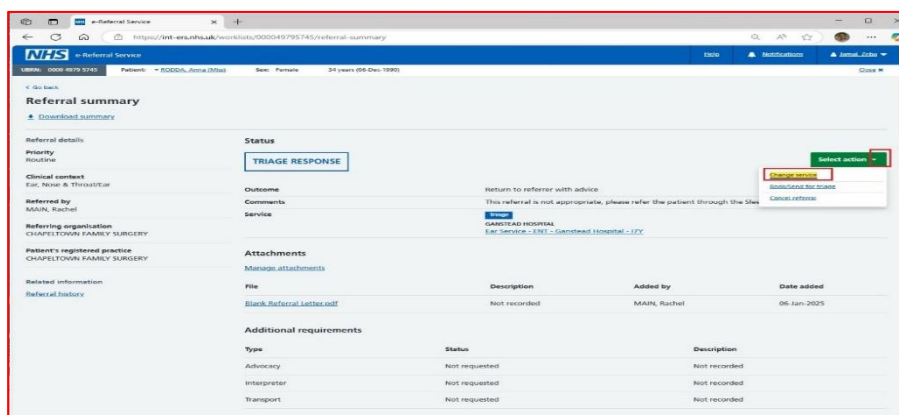
31. To view the service provider response look at the **Outcome** and **Comments** rows under the **Status** column.

32. To action a triage response on the Referral summary screen, click on the **select action** dropdown arrow and pick one of the 3 options as per screen shot below:

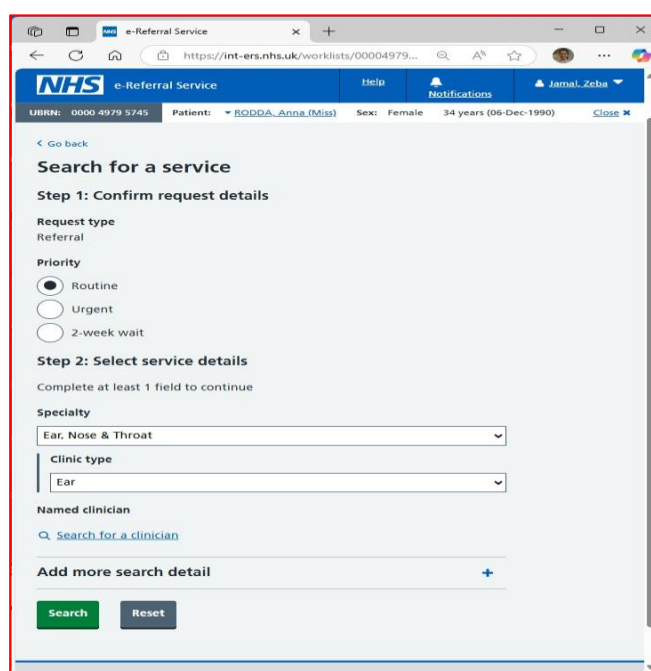
- A. Change Service
- B. Book/Send for Triage
- C. Cancel referral

A. Select action– Change Service

33. Click on the green drop down list to **Change Service** via **Select action**.

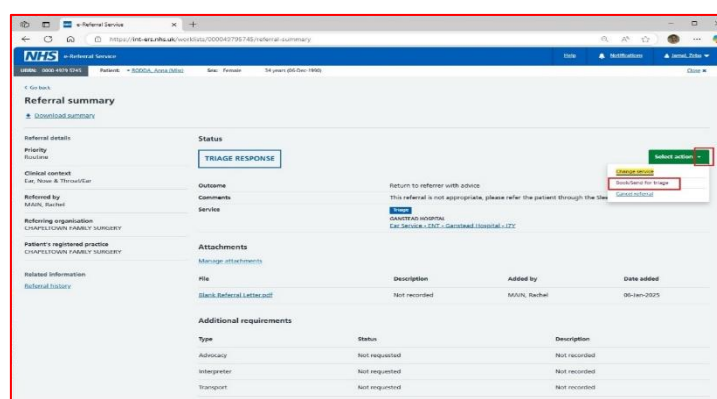
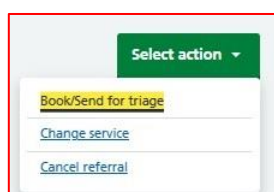


34. The user can now search for another service and refer the patient into an appropriate clinic.

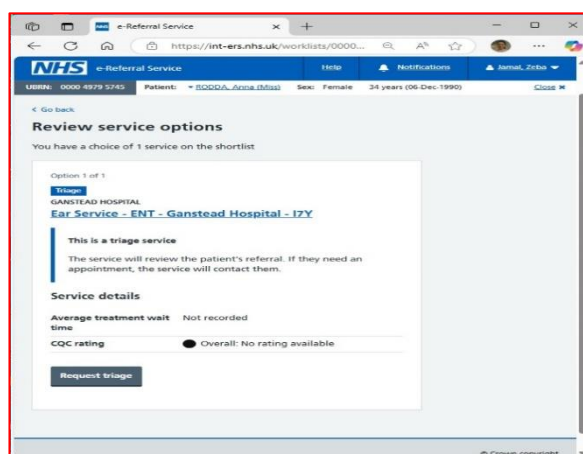


B. Select action– Book Send for Triage

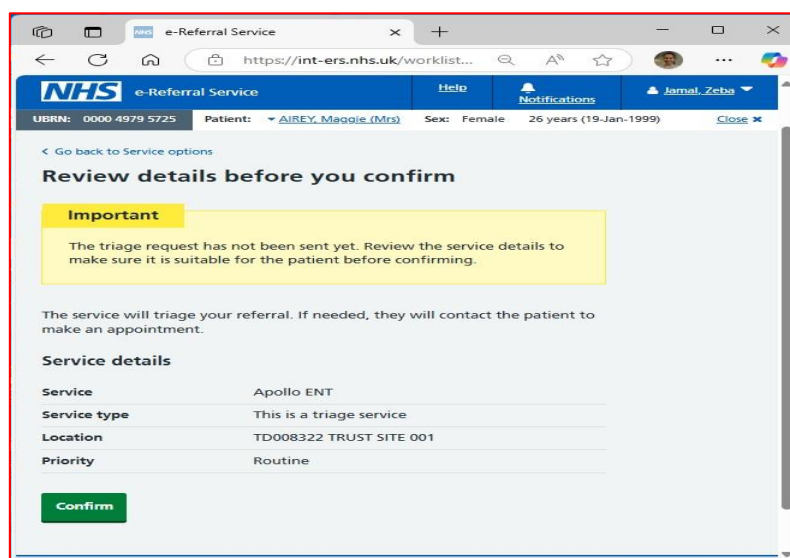
35. Click on the green drop down list to **Book/Send for Triage** via **Select action**.



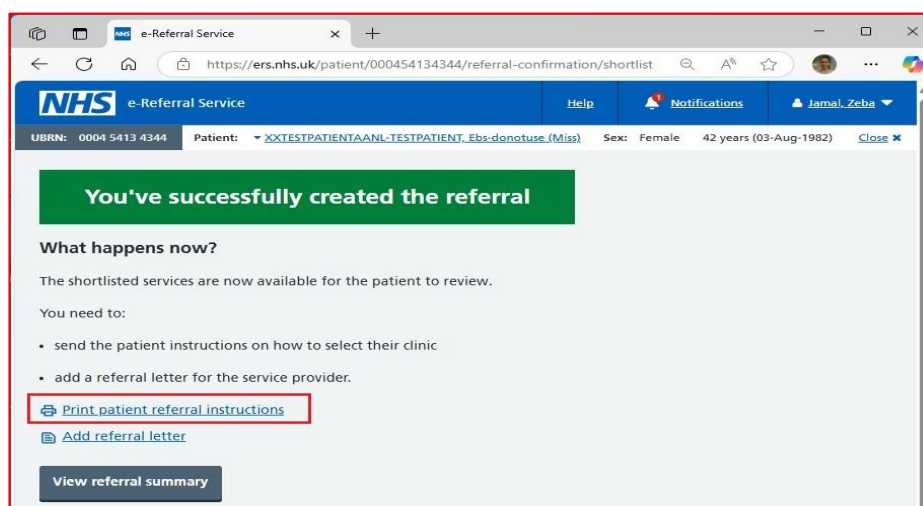
36. Click on **Request triage** if that is the service you want to select.



37. Review the information before confirming. Press the **Confirm** button to proceed. Otherwise click on **Go back to Service options** to take you back to the previous screen and review your selection of choices.



38. Once you have confirmed your choice **Print patient referral instructions** and send them to the patient. Then, click on **View referral summary** to take you back to the Referral summary screen.



C. Select Action – Cancel referral

39. Click on the green drop down list to **Cancel referral** via **Select action**.

The screenshot shows the 'Referral summary' page for a patient named Anna (Miss). The 'Status' is 'TRIAGE RESPONSE'. The 'Outcome' is 'Return to referrer with advice'. The 'Comments' state 'This referral is not appropriate, please refer the patient through the standard referral process'. The 'Service' is 'Generalist response: Ear Service - SNL - Stretford Hospital - LIT'. The 'Attachments' section shows a file named 'Book Referral Letter.pdf'. The 'Additional requirements' section shows a table with columns 'Type', 'Status', and 'Description'. The table contains rows for 'Advocacy', 'Interpreter', and 'Transport', all with a status of 'Not requested'.

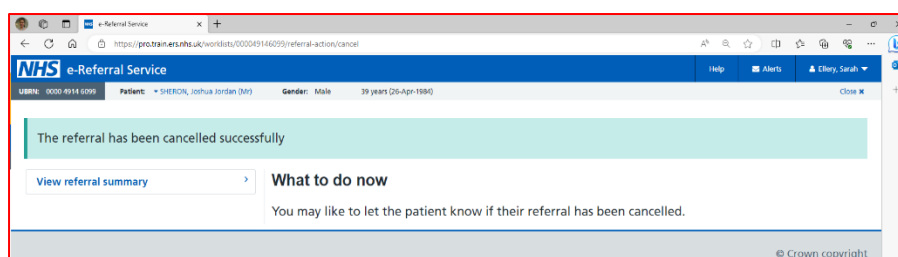
40. Click on the reason for cancelling (ending) the triage, usually the referrer has provided information to proceed treatment in primary care or booked outside e-RS so you can remove the referral as its journey has been completed.

The screenshot shows the 'Why are you cancelling this referral?' form. The 'Other' radio button is selected. The text area below it is empty. The 'Continue' button is highlighted.

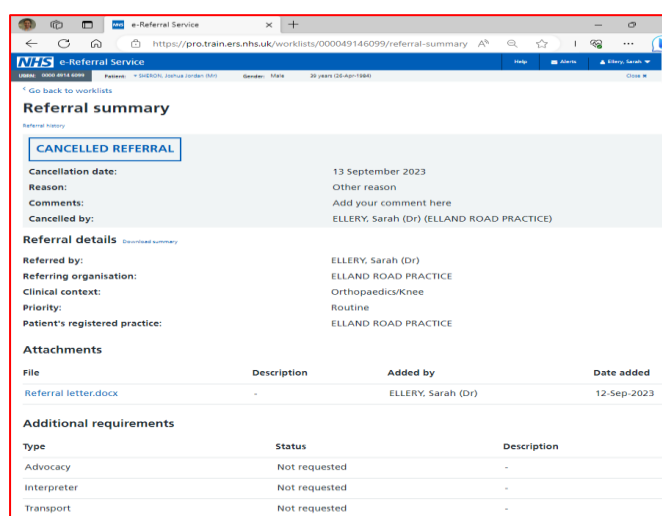
41. Follow the online instructions to check and remove the triage.

The screenshot shows the 'Referral action/cancel' page. The 'Check these details before you continue' section is highlighted. The 'Reason for cancelling the referral' section has a text area for 'Other reason' with the text 'This is a test'. The 'Before you continue' section contains a warning: 'You will not be able to reverse this step if you continue. Any unsaved work will be lost.' and a 'Confirm' button.

42. This screen will display the referral has been successfully cancelled.



43. Click on **view referral summary** to go back to the previous screen. This will now show as a cancelled referral in the referral summary screen and the referral will be removed from the worklist.



- Rejected referrals

44. Have the same actions as triage referrals and you can action them in the same way as above.

- Missing referral letters

Referrals without attached letters can delay triage and booking. These letters often contain essential clinical information needed by providers to assess and accept the referral.

Regularly check the Worklist for entries flagged as **Letter Required**. Upload missing documents promptly to avoid rejection and ensure smooth patient care.

1. Referral letters are essential for clinical triage and decision-making. Without them, providers may reject or delay referrals due to insufficient information.
2. The Worklist flags referrals missing letters under the **Letter Required** category. This helps staff quickly identify and resolve gaps.
3. Uploading the referral letter ensures the provider has the necessary clinical context to assess and accept the referral.
4. Missing letters can lead to delays in patient care and additional administrative work.
5. Practices should regularly check this tile to avoid bottlenecks and ensure referrals are complete.
6. Always document when letters are uploaded to maintain audit trails and support continuity of care.

- Incomplete UBRNs

An incomplete Unique Booking Reference Number (UBRN) may indicate missing data or an unfinished referral. These need to be completed before any action can be taken.

Use filters to identify incomplete UBRNs and update them with the necessary information. This helps prevent delays and ensures referrals are processed correctly.

1. A Unique Booking Reference Number (UBRN) is assigned to each referral in e-RS. It links the referral to the patient and provider.
2. Incomplete UBRNs may indicate missing data, errors, or referrals that were started but not submitted.
3. These referrals cannot be processed until the UBRN is completed and validated.
4. Use filters to locate incomplete UBRNs and update them with the required information.
5. Completing UBRNs promptly helps avoid delays and ensures referrals move forward smoothly.
6. Regular monitoring of this tile supports accurate referral tracking and better patient outcomes.

- Active advice requests

Advice requests allow clinicians to seek guidance before making a full referral. These remain active until a response is received or action is taken.

Monitor the Worklist for ongoing advice requests. Once advice is received, decide whether to proceed with a referral, redirect the patient, or close the request.

1. Advice requests allow clinicians to seek input from specialists before making a full referral.
2. These requests remain active until a response is received or the request is closed.
3. The Worklist highlights active advice requests so teams can monitor progress.
4. Once advice is received, staff must decide whether to proceed with a referral, redirect the patient, or close the request.
5. Timely action on advice responses prevents unnecessary delays and improves patient care.
6. Documenting decisions and actions taken ensures transparency and supports team communication.

- Assessment results / Cancelled referrals / Did Not Attend (DNA)

This tile includes referrals with assessment outcomes, cancellations, or Did Not Attend (DNA) flags. These require review to determine next steps.

Click into each referral to view results or reasons for cancellation. You may need to rebook, contact the patient, or close the referral depending on the outcome.

1. This tile includes referrals with assessment outcomes, cancellations, or Did Not Attend (DNA) flags.
2. Each status requires review to determine appropriate next steps.
3. Assessment results may prompt further action, such as booking follow-up appointments or closing the referral.
4. Cancelled referrals should be reviewed to understand the reason and whether re-referral is needed.
5. DNA cases may require contacting the patient or rescheduling, depending on local policy.
6. Keeping this tile up to date ensures accurate records and supports safe patient management.

- Referrals pending external action

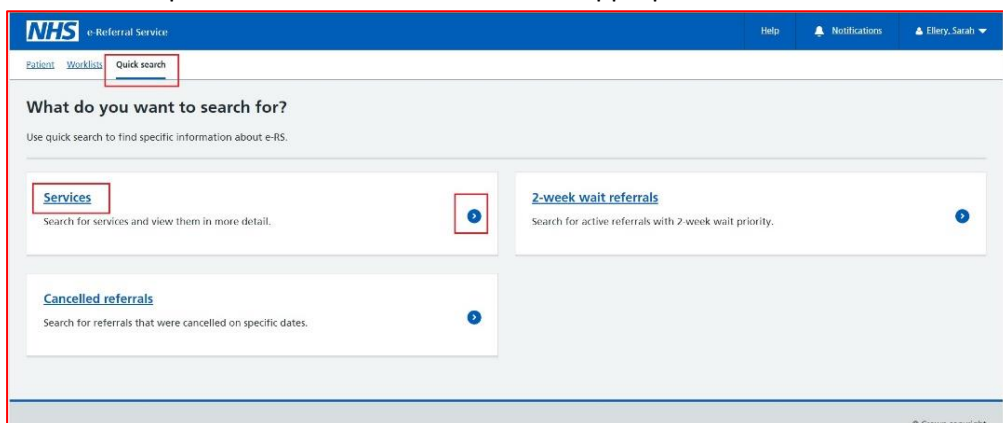
These referrals are awaiting action from external providers, such as triage or booking confirmation. They remain in the Worklist until updated.

Track these referrals to ensure they do not stall. If no update is received within expected timeframes, follow up with the provider or escalate as needed.

1. These referrals are awaiting action from external providers, such as triage decisions or appointment bookings.
2. They remain in the Worklist until the provider updates the referral status.
3. Delays in external action can impact patient care and service efficiency.
4. Practices should monitor this tile and follow up with providers if updates are overdue.
5. Escalation may be necessary if no response is received within expected timeframes.
6. Documenting follow-ups and outcomes helps maintain accountability and supports audit processes.

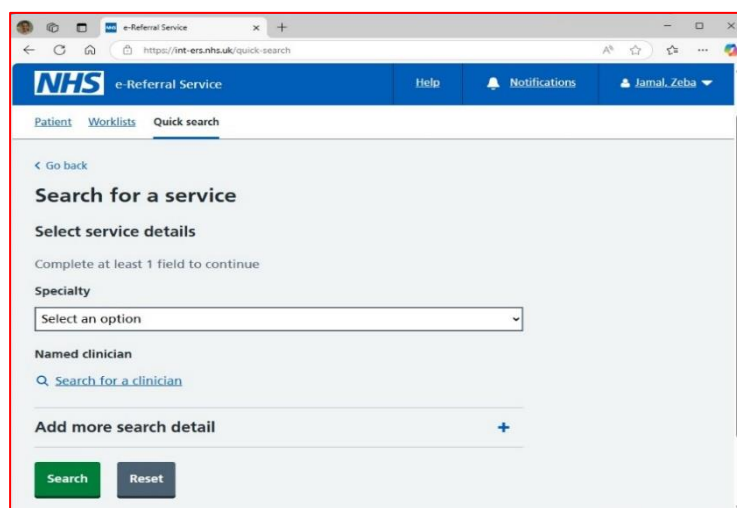
Quick search Tab

NHS e-RS hosts a large online directory of services that contains detailed service information. This helps referrers ensure that patients are booked into the most appropriate service for their clinical needs.



Search for a service using - Speciality & Clinic Type

Services



Search for a service using Speciality & Clinic Type

Service search results

More than 99 results match your search.
We can only show 99 results at a time. Refine your search if you cannot find the service you need.

| Distance | Service | Specialty | Restricted |
|----------|---|------------|------------|
| 0 miles | PARKVIEW CENTRE FOR HEALTH Cardiology Direct access echo clinic Parkview Centre for Health Imperial NHS Trust [RY] | Cardiology | Yes |
| 0 miles | PARKVIEW CENTRE FOR HEALTH Cardiology Direct access holter clinic Parkview Centre for Health Imperial NHS Trust [RY] | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology Hypertension Consultant-led Face to Face clinic Hammersmith Imperial NHS Trust [RY] | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology Hypertension Nurse-led Face to Face clinic Hammersmith Imperial NHS Trust [RY] | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology Hypertension Telephone clinic Hammersmith Imperial NHS Trust [RY] | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology Hypertension TRIAGE Hammersmith Imperial NHS Trust [RY] | Cardiology | No |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology Hypertension Video clinic Hammersmith Imperial NHS Trust [RY] | Cardiology | Yes |
| 2 miles | ROYAL BROMPTON HOSPITAL Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3 | Cardiology | No |

Search for a service using Postcode

Search for a clinician

Add more search detail

Find services near (optional)

☒ Postcode
For example, SE26 6QL

☐ Location
☐ All locations

Maximum distance from postcode or location (optional)
 miles

Service provider organisation (optional)
An organisation that provides services. For example, a hospital.
[Search for a service provider organisation](#)

Priority (optional)

☐ Routine
☐ Urgent
☐ 2-week wait
☐ All

Sex treated (optional)

☐ Male and female
☐ Male
☐ Female

Patient age (optional)
 Years Months

Service search results

More than 99 results match your search.
We can only show 99 results at a time. Refine your search if you cannot find the service you need.

| Distance | Service | Specialty | Restricted |
|----------|--|------------|------------|
| 1 mile | PARVIEW CENTRE FOR HEALTH Cardiology(Direct access echo clinic@Parview Centre for Health@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 1 mile | PARVIEW CENTRE FOR HEALTH Cardiology(Direct access holter clinic@Parview Centre for Health@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology(Isopertension Consultant-led Face to Face clinic@hammersmith@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology(Isopertension Nurse-led Face to Face clinic@hammersmith@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology(Isopertension Telephone clinic@hammersmith@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology(Isopertension Triage@hammersmith@Imperial NHS Trust (RY)) | Cardiology | No |
| 1 mile | HAMMERSMITH HOSPITAL Cardiology(Isopertension Video clinic@hammersmith@Imperial NHS Trust (RY)) | Cardiology | Yes |
| 2 miles | ROYAL BROMPTON HOSPITAL Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RBT | Cardiology | No |
| 2 miles | PUTNEYMEAD GROUP MEDICAL PRACTICE | Cardiology | Yes |

Cancelled referrals

- Users can search for referrals that have been cancelled by specifying different date ranges.

Quick search

Use quick search to find specific information about e-RS.

Services
Search the Directory of Services (DoS) for information on all e-RS services.

2-week wait referrals
Search for active referrals with 2-week wait priority.

Cancelled referrals
Search for referrals that were cancelled on specific dates.

© Crown copyright

2. You can search between two dates up to 92 days apart.
 - a. Can specify the **Priority** and **Referring Clinicians name** if required.

Search for cancelled referrals

When was the referral cancelled?
Enter the date range. This can be up to 92 days.

Start date For example, 14/02/2024 **End date** For example, 24/02/2024
dd/mm/yyyy dd/mm/yyyy [Clear dates](#)

Priority

☐ Routine
☐ Urgent
☐ 2-week wait
☐ All priorities

Do you want to add a referring clinician?

☐ Yes
☐ No
This will include all referrers in your organisation.

[Search](#) [Clear](#)

3. This is an example of a cancelled referral using the Routine Priority and including all the clinician's at the practice.

Search for cancelled referrals

When was the referral cancelled?
Enter the date range. This can be up to 92 days.

Start date For example, 14/02/2024 **End date** For example, 24/02/2024
08/04/2025 09/04/2025 [Clear dates](#)

Priority

☒ Routine
☐ Urgent
☐ 2-week wait
☐ All priorities

Do you want to add a referring clinician?

☐ Yes
☒ No
This will include all referrers in your organisation.

[Search](#) [Clear](#)

4. The search results page show the outcome of the above search.

Search results for cancelled referrals

Priority: Routine
Referrer: All referring clinicians

3 referrals match your search. Select a UBRN for more information about the referral.

Last updated: 09-Apr-2025 16:05 [Refresh](#)

| UBRN | Patient name | Date cancelled | Reason for cancelling | Priority | Request date | Referrer | Specialty |
|--------------------------------|--------------------|----------------|---------------------------|----------|--------------|----------------|--------------|
| 0000 4980 0587 | GROOM, Caleb (Mr) | 09-Apr-2025 | Triage ended | Routine | 02-Apr-2025 | AFZAL, Billaal | Gynaecology |
| 0000 4980 0588 | GROOM, Caleb (Mr) | 09-Apr-2025 | Triage ended | Routine | 09-Apr-2025 | AFZAL, Billaal | Gynaecology |
| 0000 4980 0587 | WARRY, Oswald (Mr) | 09-Apr-2025 | Referral no longer needed | Routine | 09-Apr-2025 | SWIFT, Janine | Orthopaedics |

[Back to top](#)

- The below is an example of cancelled referrals using the all priorities search criteria and all clinicians.

Search for cancelled referrals

When was the referral cancelled?
Enter the date range. This can be up to 92 days.

Start date
For example, 14/02/2024
17/03/2025

End date
For example, 24/02/2024
09/04/2025 [Clear dates](#)

Priority

☐ Routine

☐ Urgent

☐ 2-week wait

☒ All priorities

Do you want to add a referring clinician?

☐ Yes

☒ No
This will include all referrers in your organisation.

[Search](#) [Clear](#)

- The screen shot below is the outcome of the above search.

Search results for cancelled referrals

Priority: All priorities
Referrer: All referring clinicians

43 referrals match your search. Select a UBRN for more information about the referral.

Last updated: 09-Apr-2025 16:20 [Refresh](#)

| UBRN | Patient name | Date cancelled | Reason for cancelling | Priority | Request date | Referrer | Specialty |
|--------------------------------|-------------------------|----------------|---------------------------|-------------|--------------|---------------|-------------------------|
| 0000.4980.0587 | GROOM, Caleb (Mr) | 09-Apr-2025 | Triage ended | Routine | 02-Apr-2025 | AFZAL, Bilal | Gynaecology |
| 0000.4980.0588 | GROOM, Caleb (Mr) | 09-Apr-2025 | Triage ended | Routine | 09-Apr-2025 | AFZAL, Bilal | Gynaecology |
| 0000.4979.8063 | BODE, Lori (Ms) | 18-Mar-2025 | Referral no longer needed | Routine | 19-Feb-2025 | SWIFT, Janine | Orthopaedics |
| 0000.4979.8408 | DAY, Doreen Monica (Ms) | 18-Mar-2025 | Other | 2-week wait | 25-Feb-2025 | TURNER, Susan | ZWW |
| 0000.4979.9684 | HUME, Tania Emilia (Ms) | 07-Apr-2025 | Triage ended | Urgent | 19-Mar-2025 | SWIFT, Janine | Medical Examiner Office |

Quick Search using 2-week wait referrals Option

- To search for referrals made in your practice that have a 2-week wait Priority click on the **2-week wait referrals** hyperlink.

Quick search

Use quick search to find specific information about e-RS.

Services
Search the Directory of Services (DoS) for information on all e-RS services.

Cancelled referrals
Search for referrals that were cancelled on specific dates.

2-week wait referrals
Search for active referrals with 2-week wait priority.

8. The user can specify by searching on a particular clinician or search on all clinicians at the practice.

Search for 2-week wait referrals

Do you want to add a referring clinician?

☐ Yes

☒ No

This will include all referrers in your organisation.

[Search](#) [Clear](#)

9. If you want to specify a particular clinician, select the clinicians name using the dropdown list.

Search for 2-week wait referrals

Do you want to add a referring clinician?

☒ Yes

Select referrer

BLACKBURN, Matthew

☐ No

This will include all referrers in your organisation.

[Search](#) [Clear](#)

10. Otherwise, select radio button **No** if you want to search for all the clinicians at the practice.

Search for 2-week wait referrals

Do you want to add a referring clinician?

☐ Yes

☒ No

This will include all referrers in your organisation.

[Search](#) [Clear](#)

- The search results are shown below for all the clinicians at the practice who have made a 2-week wait referral.

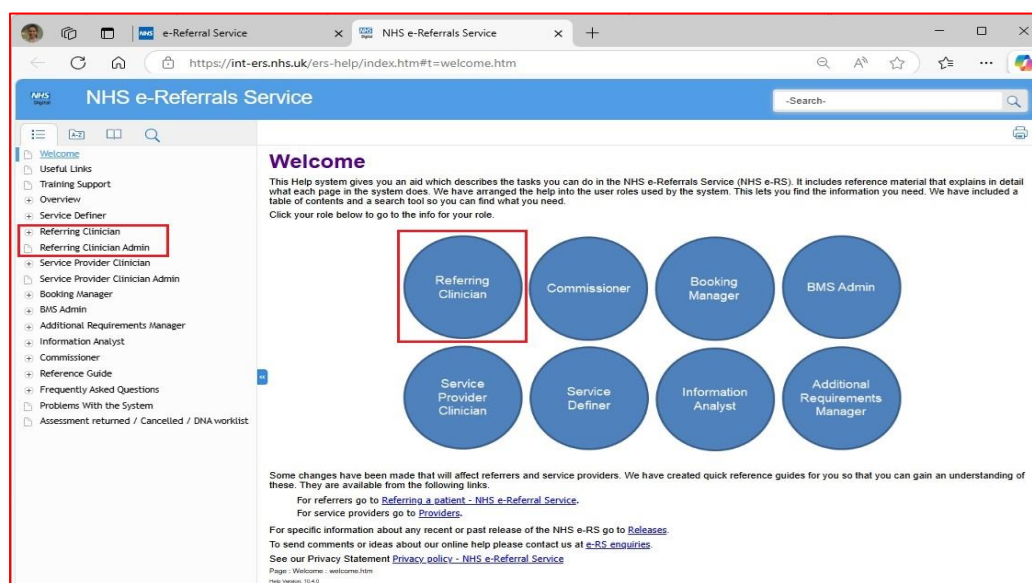
| UBRN | Patient name | Request date | Status | Appointment | Referrer |
|--------------------------------|---------------------------|--------------|----------------------|--------------|----------------------|
| 0000 4979 6316 | RIMMER, Leanne Dinah (Ms) | 17-Jan-2025 | Awaiting triage | Not recorded | WILDE, Jane |
| 0000 4979 8513 | EUSTON, Leona Lilia (Ms) | 26-Feb-2025 | Rejected | Not recorded | WATSON, Adele |
| 0000 4979 8540 | DAY, Doreen Monica (Ms) | 26-Feb-2025 | Rejected | Not recorded | TURNER, Susan |
| 0000 4979 8707 | BAKER, Anita (Ms) | 03-Mar-2025 | Deferred to provider | Not recorded | ROUSE, Preeti (Miss) |

Help

- The **Help** takes you to the NHS e-referrals Service website and you can navigate to the appropriate guides.



- Click on the **Referring Clinician Circle** or expand it on the left hand side as highlighted in red.



- Click on the **Worklists** to get help.

Worklists

Worklists let you view information about your patients and their UBRNs. As a general rule if a referral is on a worklist it should be monitored or actioned. You must review ALL worklists on a regular basis. Managing worklists happens within one screen. The page lets you see the following worklists:

- Rejected / triage response
- Letter outstanding
- Incomplete
- Advice and guidance
- Assessment returned / Cancelled / DNA
- Awaiting Bookings

As a general rule if a referral is on a worklist it should be monitored or actioned. You must review ALL worklists on a regular basis. Worklists can be fetched manually by clicking **Refresh** after the initial opening of the window.

| Worklist | Count |
|---------------------------------------|-------|
| Rejected / triage response | 27 |
| Letter outstanding | 15 |
| Incomplete | 6 |
| Advice and guidance | 21 |
| Assessment returned / Cancelled / DNA | 16 |
| Awaiting Bookings | 17 |

Notifications

Yellow Bar

15. If the national team need to communicate to users they will often send out messages via the **Notifications** route.

Friday 6 December - IMPORTANT INFORMATION [Read now](#) | [Remind me later](#)

Find a patient

Select a search option

☐ NHS number

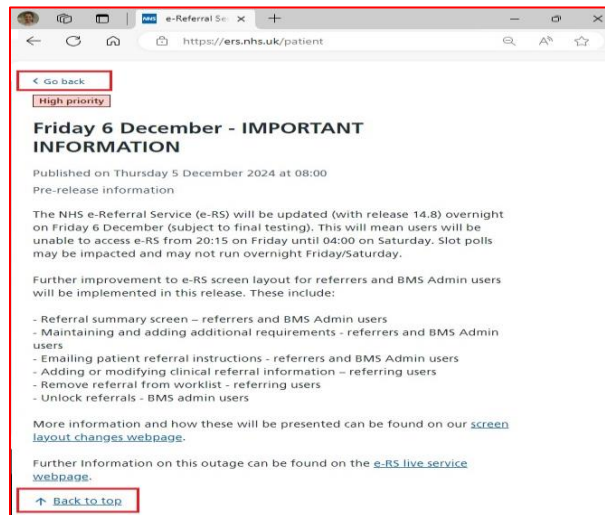
☐ UBRN

☐ Patient details

Search using a patient's name and date of birth

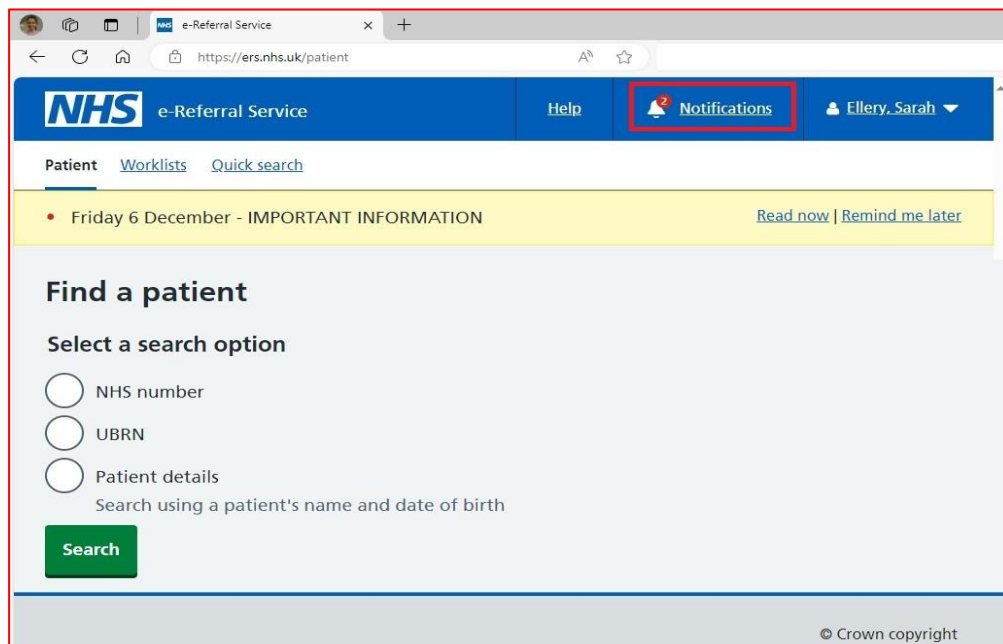
Search

16. Once the user has read the notification they will need to click on the **Go back** hyperlink located at the top left-hand corner to get back into the previous screen.

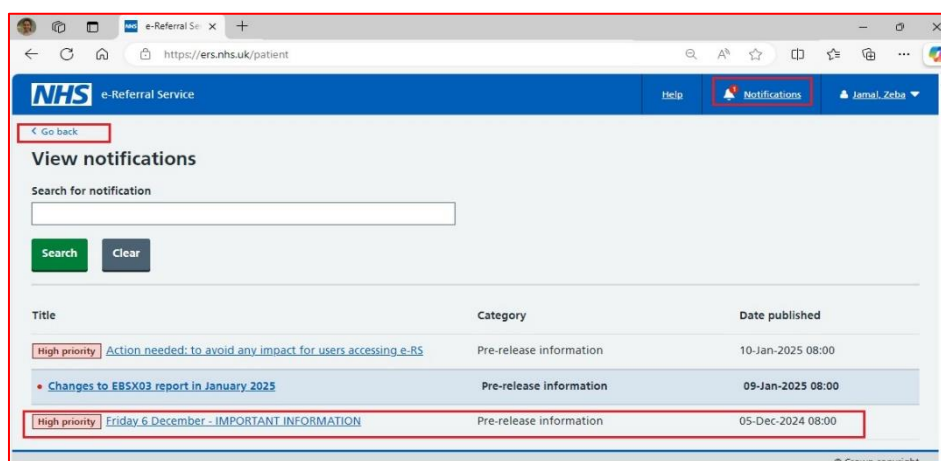


Blue Bar

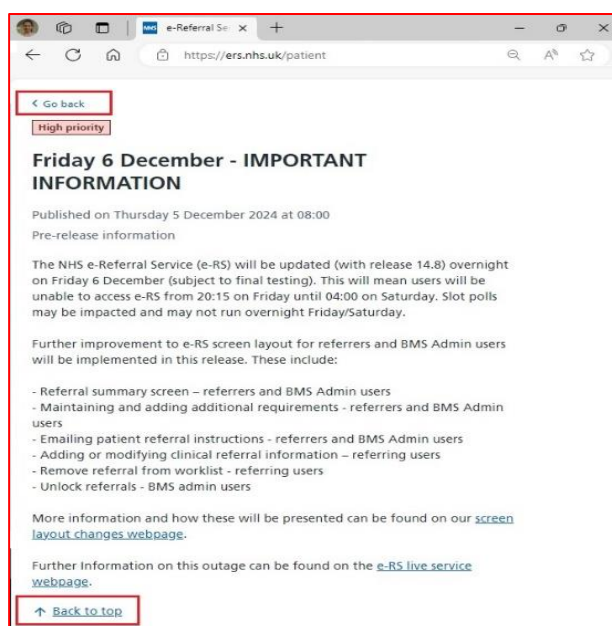
17. If the user has previously read the notification by using the yellow bar then they can click on the notifications in the top menu option.



18. The new notifications screen is shown below.

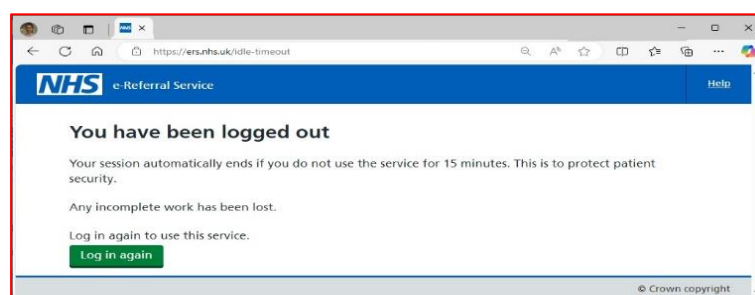


19. The new notifications screen is shown below. This is an example of the notifications screen.

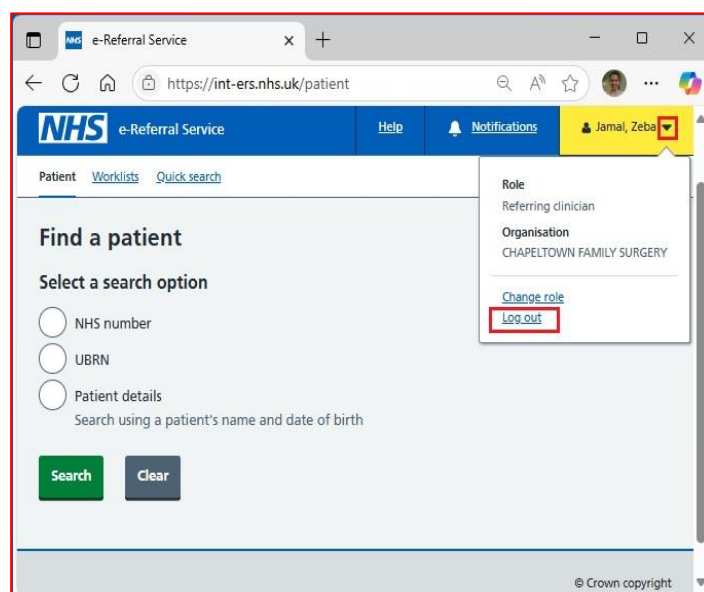


NHS e-RS Time out & Logging off

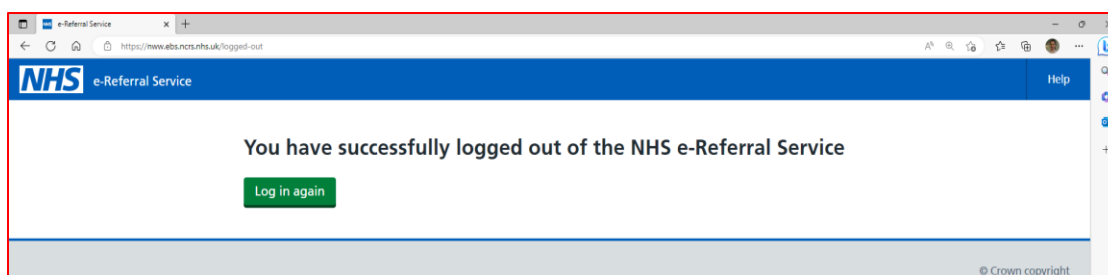
20. If there is no activity on the e-RS website for 15 minutes, e-RS will time out.



21. To logout from the e-RS website, click on the drop down arrow next to your name to view the available options: Click on **Log out**.



22. Close the Browser once you have successfully logged off the e-RS website.



Help & Support

NHS e-Referral Service (Resources)

Below are useful Website links from the e-RS national Team:

- Referring organisations :support materials for using the NHS e-Referral Service (e-RS) - NHS England Digital
- <https://digital.nhs.uk/services/e-referral-service>
- <https://digital.nhs.uk/services/e-referral-service/helping-patients-manage-their-referral-online>
- <https://digital.nhs.uk/services/e-referral-service/referrers/referrer-support-materials>
- Document library - NHS e-Referral Service - NHS Digital

e-RS events at NHS

<https://digital.nhs.uk/services/e-referral-service/e-referral-service-news-and-events/events>

e-RS for Referrers Advice & Guidance at NHS

Advice and guidance user support information for the NHS e-Referral Service - NHS Digital

e-RS website for checking the worklist

<https://ers.nhs.uk>

e-RS Release Updates

[Update on commonly raised referring user issues since the NHS e-Referral Service \(e-RS\) release 15.3 \(May 2025\) - NHS England Digital](#)

Local Hospitals within NWL ICB

1. If you have any issues with referrals please contact the **GP Liaison Officer** for that hospital or the PALS team.
2. We have four main NHS trusts within Our NWL ICB area they are listed below with their contact information and sites:

Imperial College Health Care NHS Trust

3. Website: <https://www.imperial.nhs.uk/gps-and-referrers/gp-liaison-office>
4. Email: gpliaison.imperial@nhs.net
 - a. Hammersmith Hospital
 - b. Charing Cross hospital

- c. St Marys Hospital
- d. Western Eye Hospital
- e. Queen Charlottes and Chelsea Hospital

Chelsea and Westminster Hospital NHS Foundation Trust

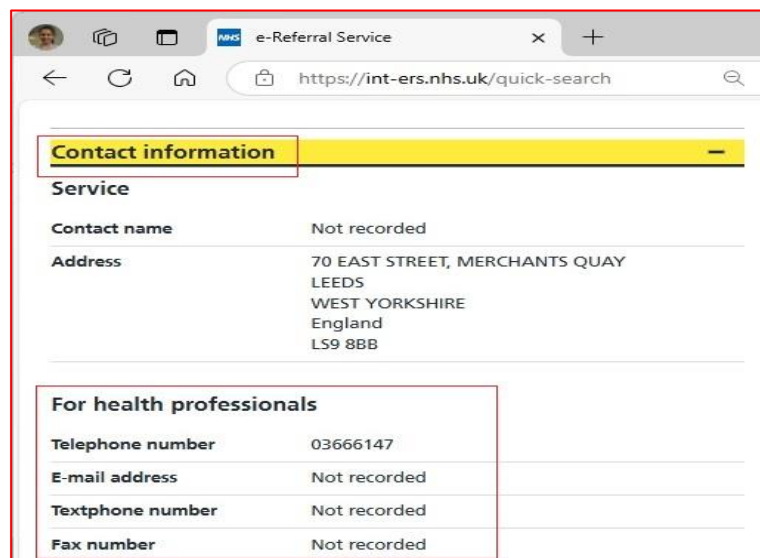
- a. Chelsea & Westminster Hospital
- b. West Middlesex University Hospital

London North West University Healthcare NHS Trust

- 5. Primary Care Liaison Manager Email: lnwh-tr.primarycarequeries@nhs.net
 - f. Central Middlesex Hospital
 - g. Ealing Hospital
 - h. Northwick Park Hospital
 - i. St. Mark's Hospital

Hillingdon hospitals NHS foundation trust

- 6. Email thh-tr.bookingcentre@nhs.net
 - j. Hillingdon Hospital
 - k. Mount Vernon Hospital
- 7. Otherwise, you can use the **contact information** page via the Quick Search on the e-RS website.



The screenshot shows a web browser window with the URL <https://int-ers.nhs.uk/quick-search>. The page has a yellow header bar with the text "Contact information". Below this, there is a section titled "Service" with the following details:

| | |
|--------------|---|
| Contact name | Not recorded |
| Address | 70 EAST STREET, MERCHANTS QUAY LEEDS WEST YORKSHIRE England LS9 8BB |

Below the service details, there is a section titled "For health professionals" with the following details:

| | |
|------------------|--------------|
| Telephone number | 03666147 |
| E-mail address | Not recorded |
| Textphone number | Not recorded |
| Fax number | Not recorded |

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 IT Service Desk:
Phone: 0203 350 4050 or Email: nhsnwl.servicedesk@nhs.net