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.

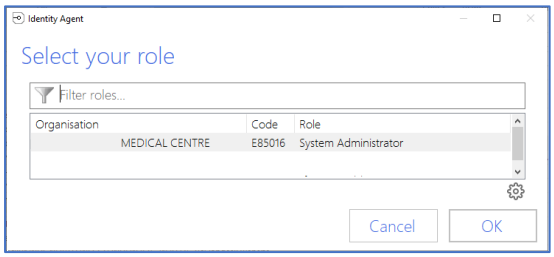
GP practices across North West London are responsible for the **daily management of their NHS e-Referral Service (e-RS) Worklists.** Regular monitoring and timely action are essential to ensure safe and efficient referral handling.

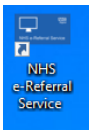
Daily Worklist Management

- 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.

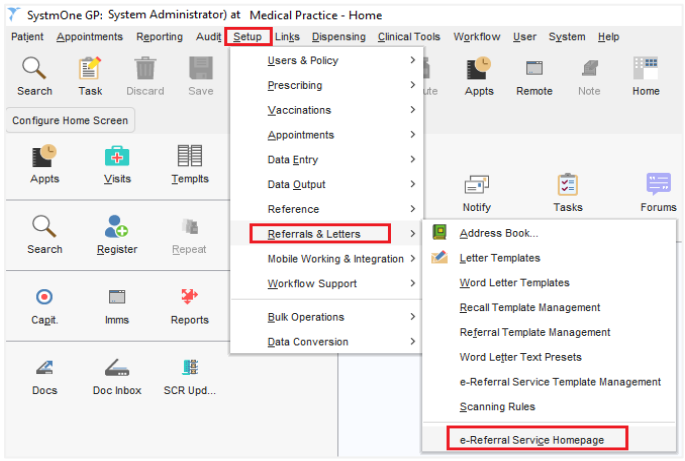
Accessing the e-RS website

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.



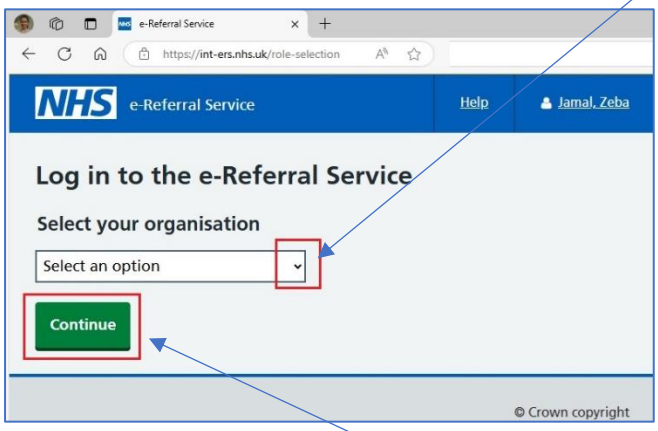
2. Open the e-RS website using **Microsoft Edge** (not Chrome) by either clicking on :
   a. **Website Hyperlink**: https://ers.nhs.uk/role-selection
   b. **e-RS Icon** on the desktop : 

   c. or in **SystmOne** navigate from the top menu:
      i. **Setup → Referrals & Letters → e-Referral Service Home Page**

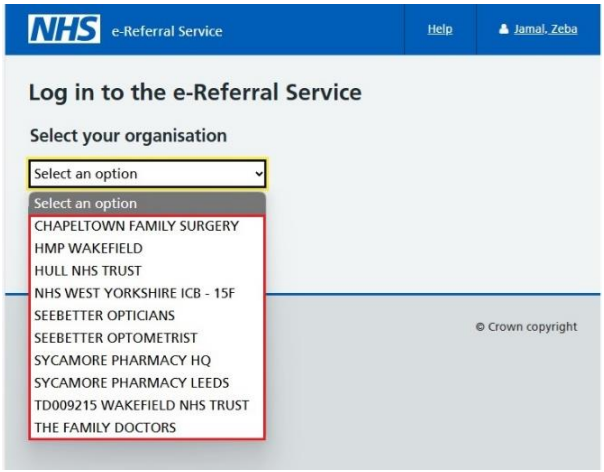


Tip: Ensure your Smartcard has the correct referrer role assigned. Your practice manager can request this via the Registration Authority (RA) team using the RA02 form.

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

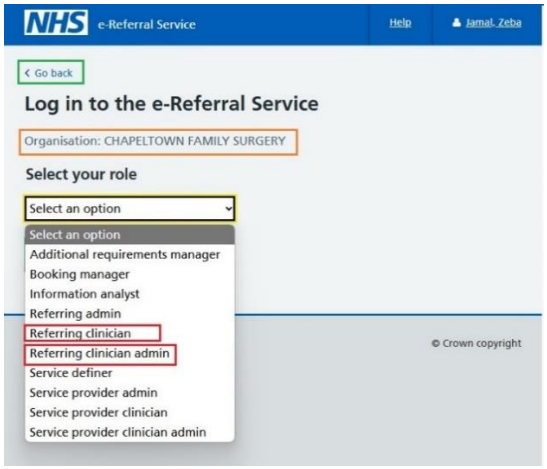


4. Once you have chosen your organisation, in this example we are choosing CHAPELTOWN FAMILY SURGERY then click on **Continue**.



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**.

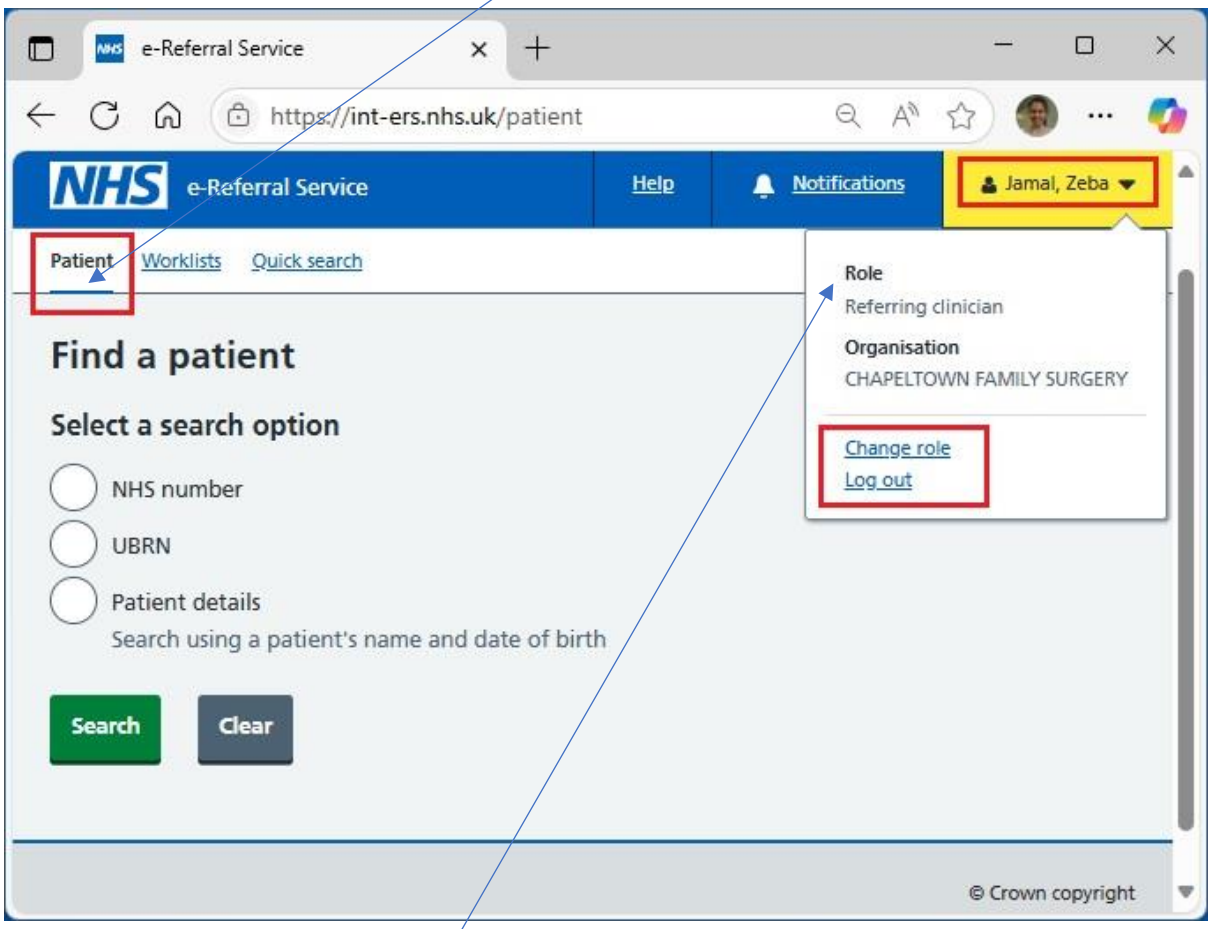


6. You have now successfully logged into the e-RS system and will be presented with the home screen.

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 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.

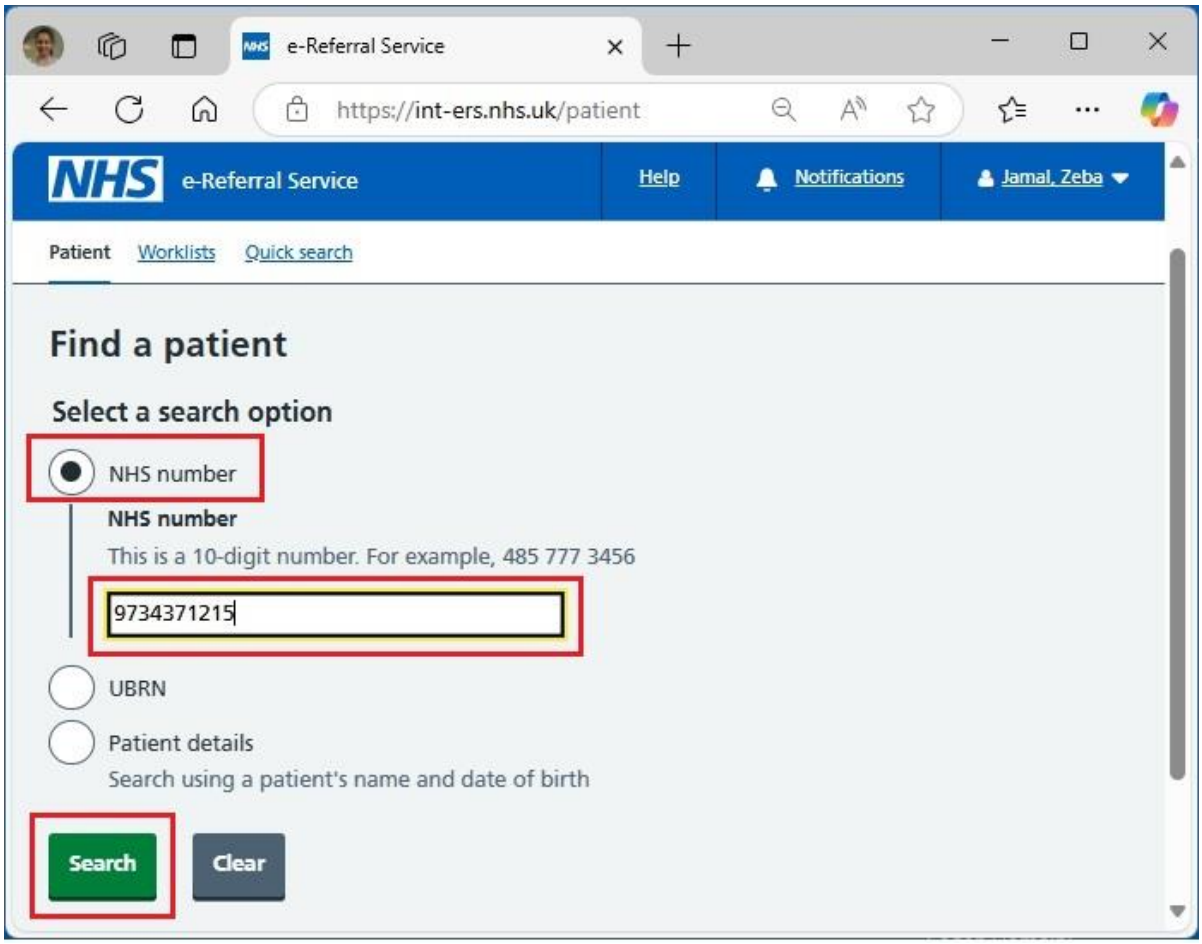
    c. The options you can perform are changing your role, if you have access to multiple roles on e-RS or if you want to log off from the website.

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) o**r 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:

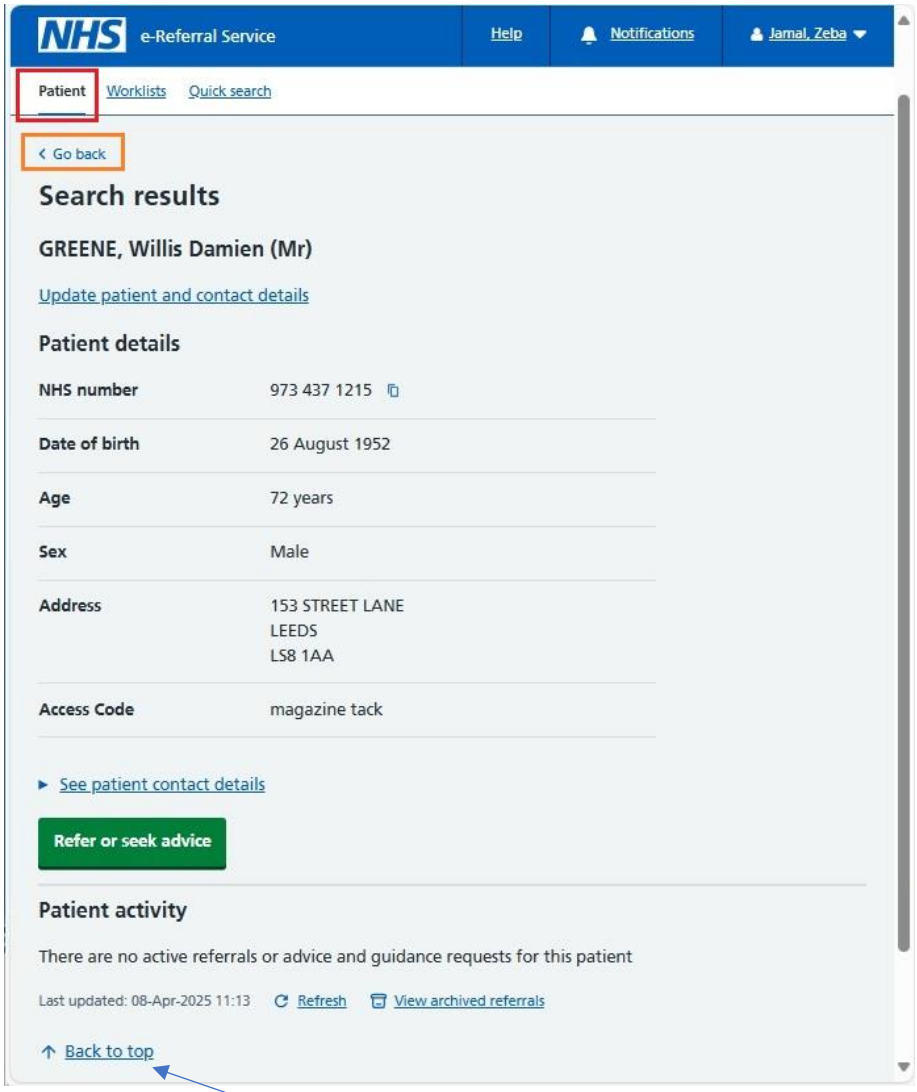
Find a patient using NHS Number

a. Click on the Radio button NHS Number
b. Type or paste in the Patients NHS Number
c. Click on Search



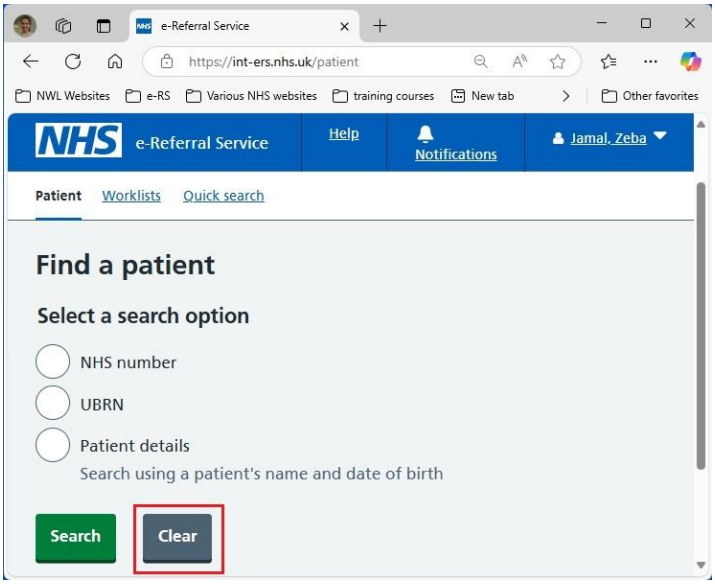
d. In the example below, the patient did not have any referrals made. So the patient activity is empty.

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.



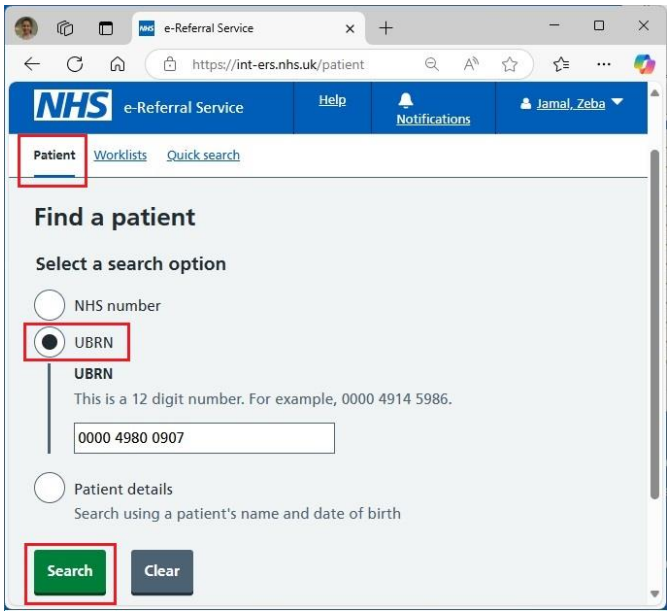
f. To go **back to the top** of the screen click on Back to the top hyperlink located at the bottom left hand corner of the screen.

g. Click on the **Clear** button to remove the information in order to search again

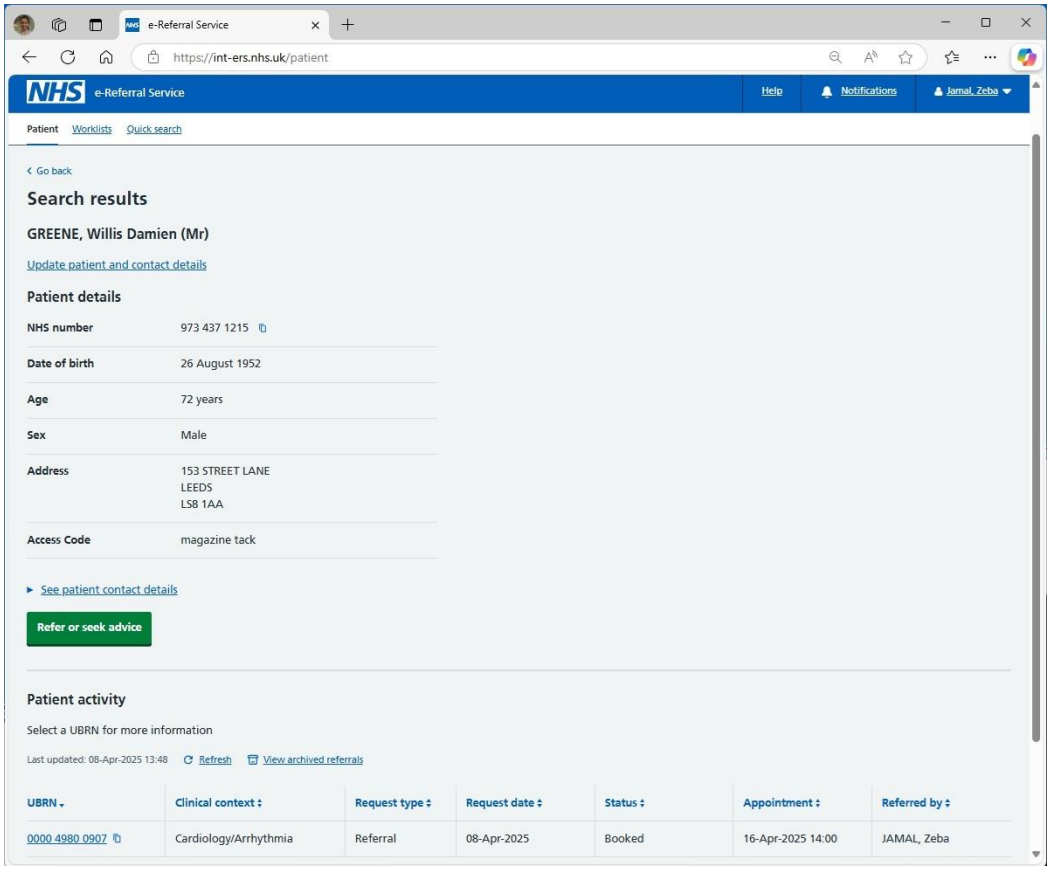


Find a patient using URBN – Unique booking reference number

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

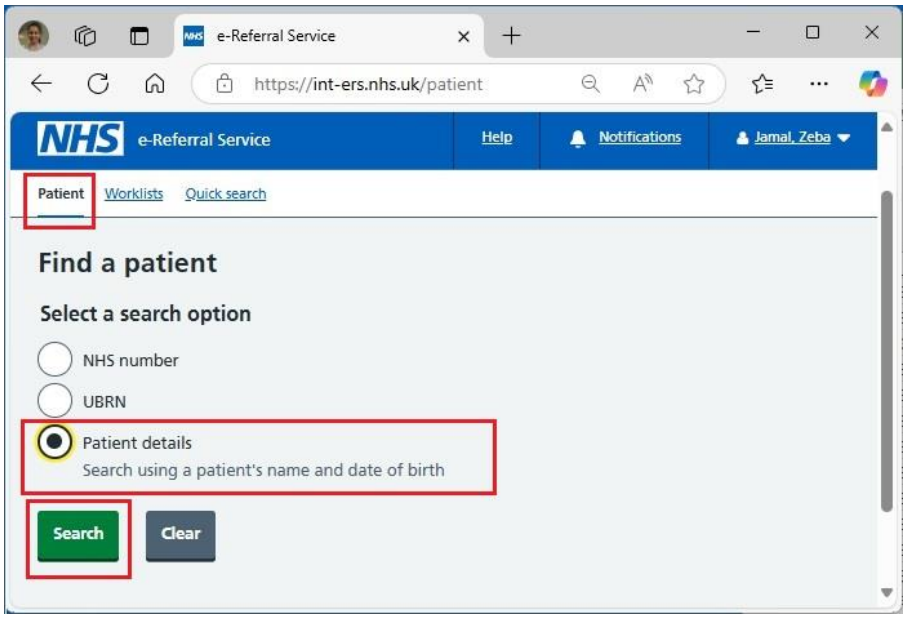


    c. This example it shows that one referral was made at the bottom of the screen

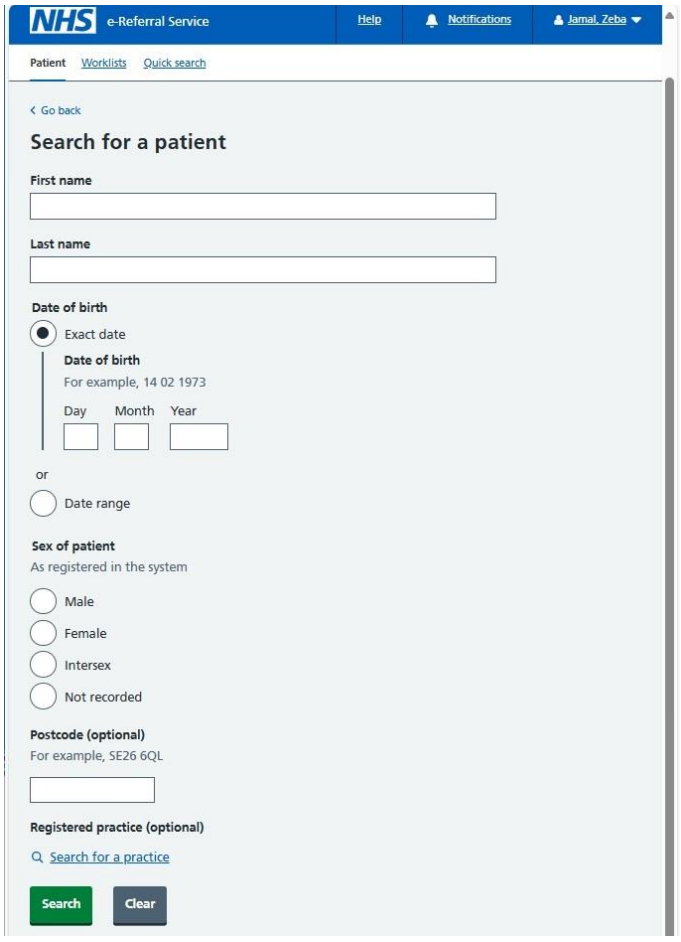


Find a patient using Patient Details

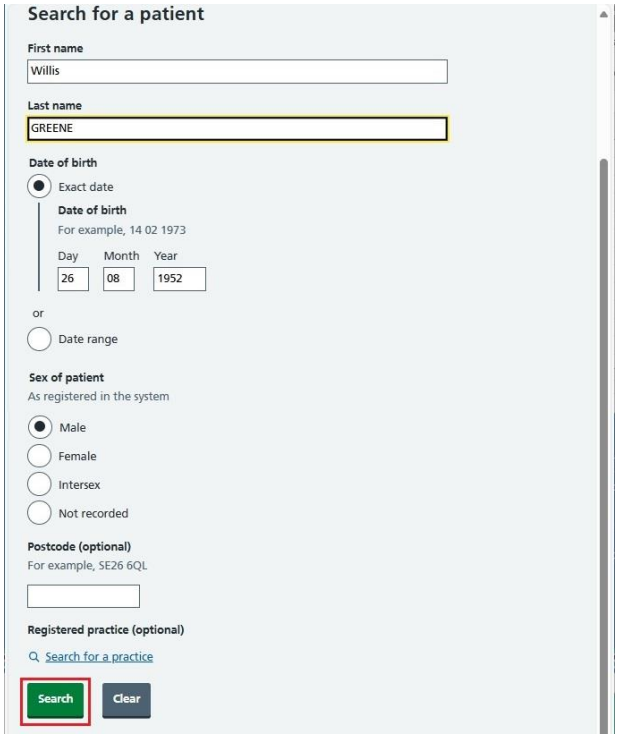
12. Click on the Radio button **Patient Details**
    a. Type or paste in the Patients information
    b. Click on **Search**



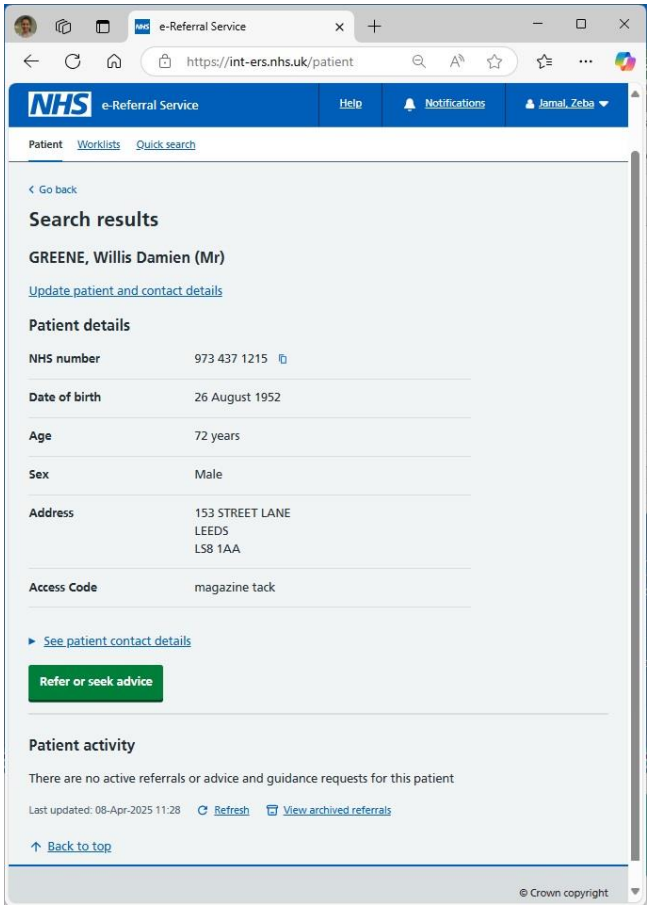
    c. This example it shows the fields that need to be filled out



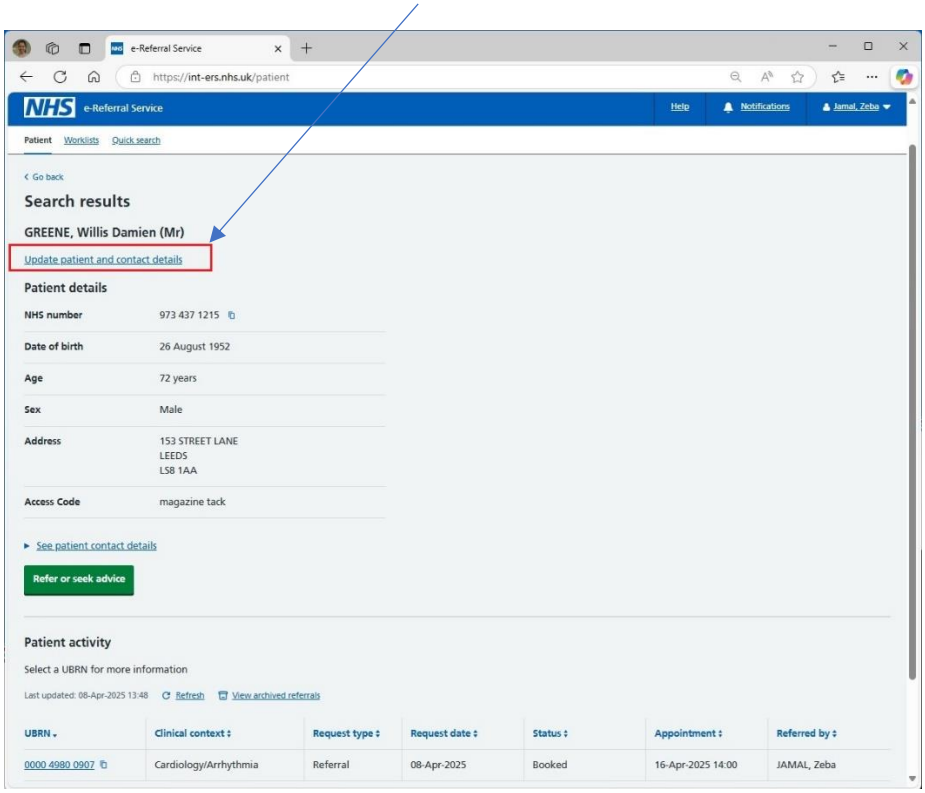
d. This example below shows the populated fields



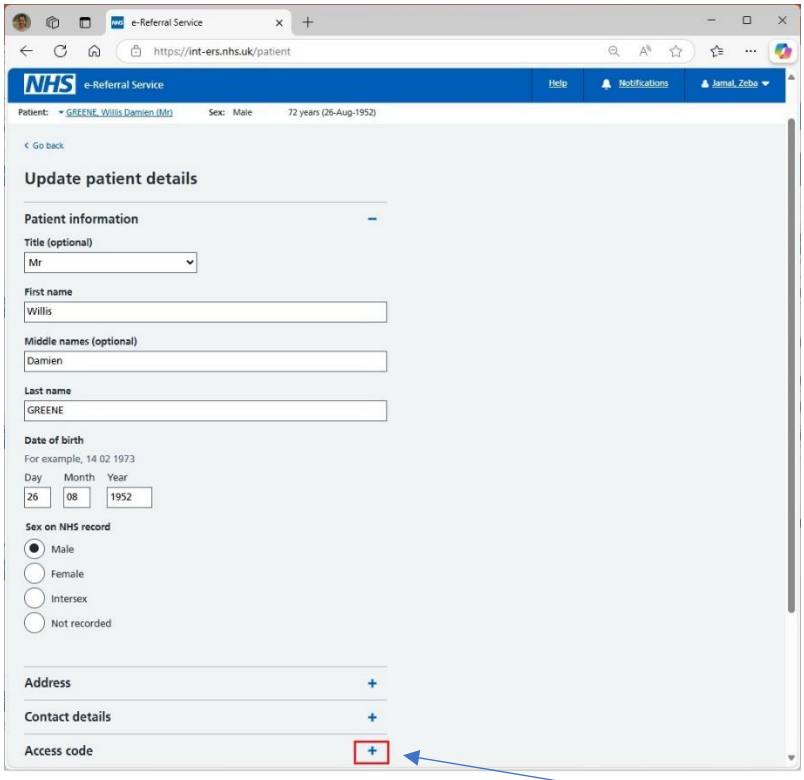
e. This example shows the patient did not have any prior referrals



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

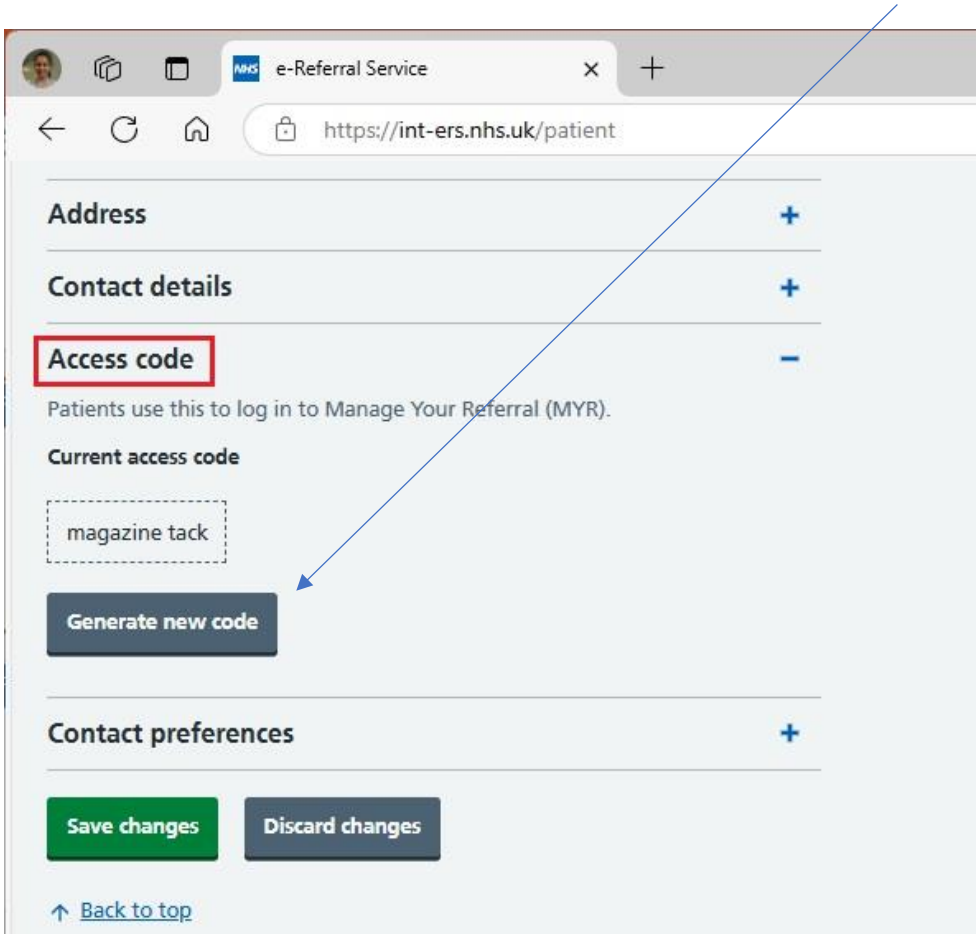


14. This screen shows where the user can make amendments.

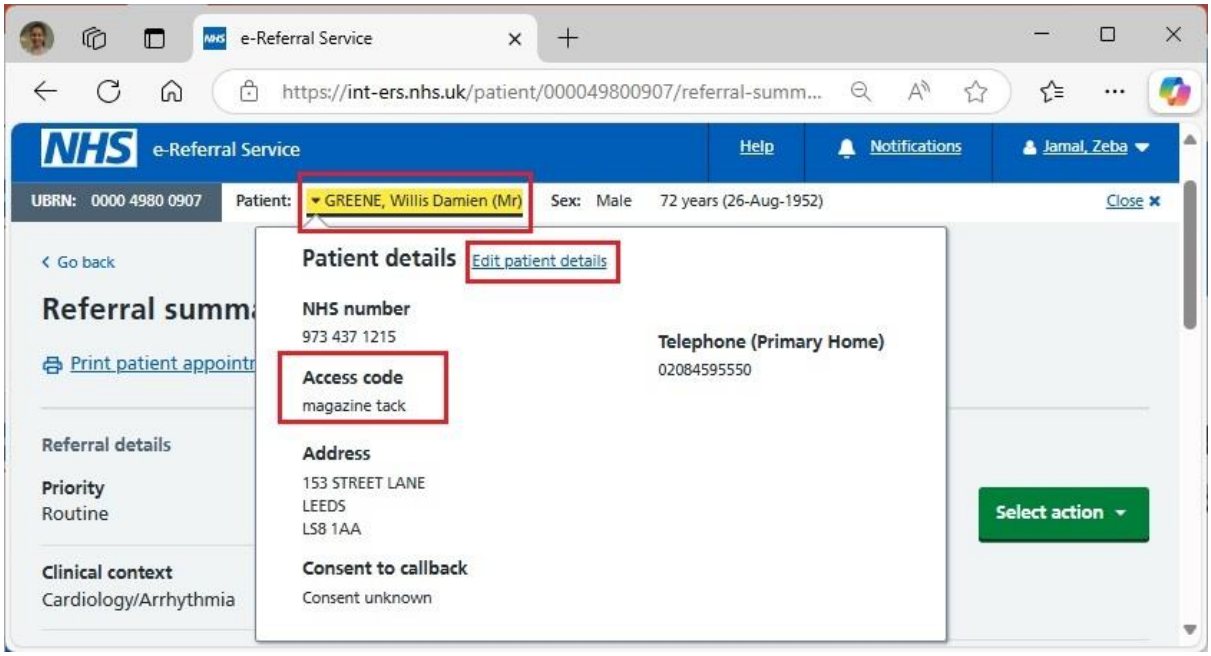


15. The user can expand the fields by clicking on the ‘ **+’** symbol.

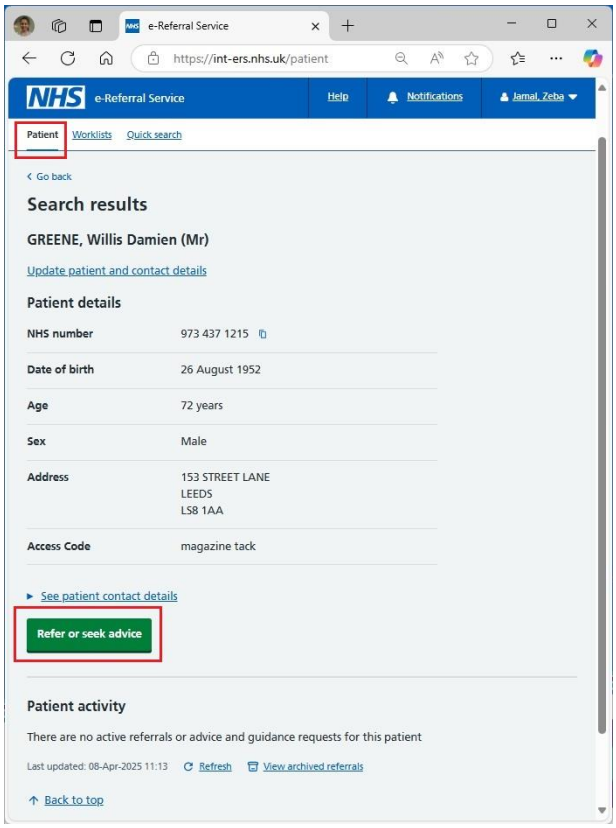
16. The example below shows how to find the **Access code,** which the patient will need to book, amend or cancel their appointment. The user can also **generate a new code** for the patient.



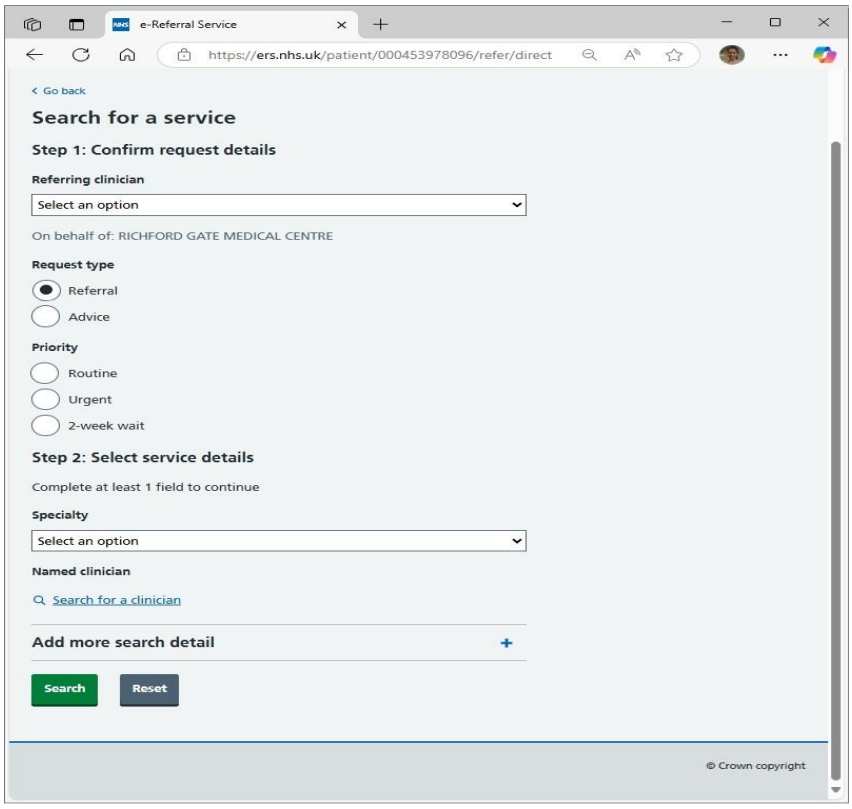
17. The patient details are also available to amend on the referral summary screen at the top under the NHS e-Referral service logo.



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



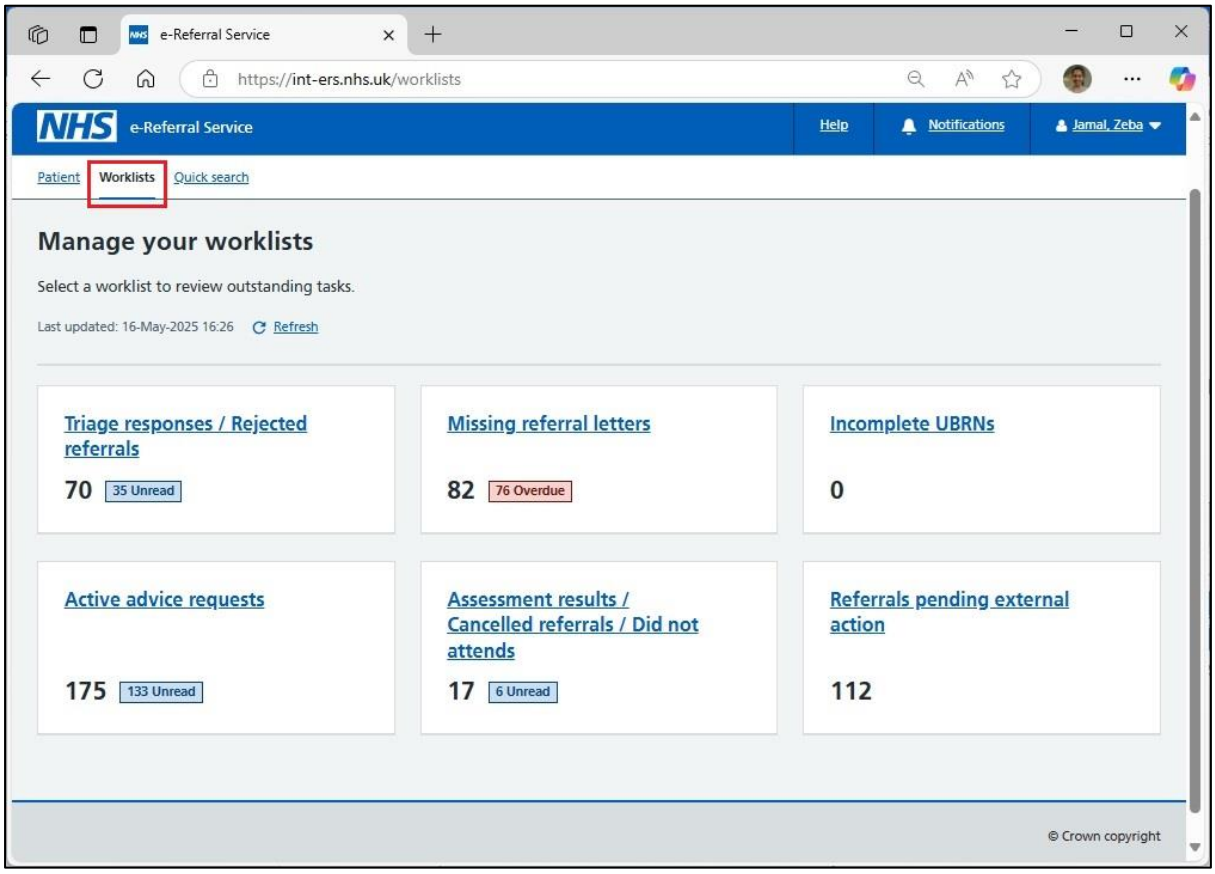
19. This will take the user to the **search for a service** screen.



Worklists Tab (Hyperlink)

Worklists tiles

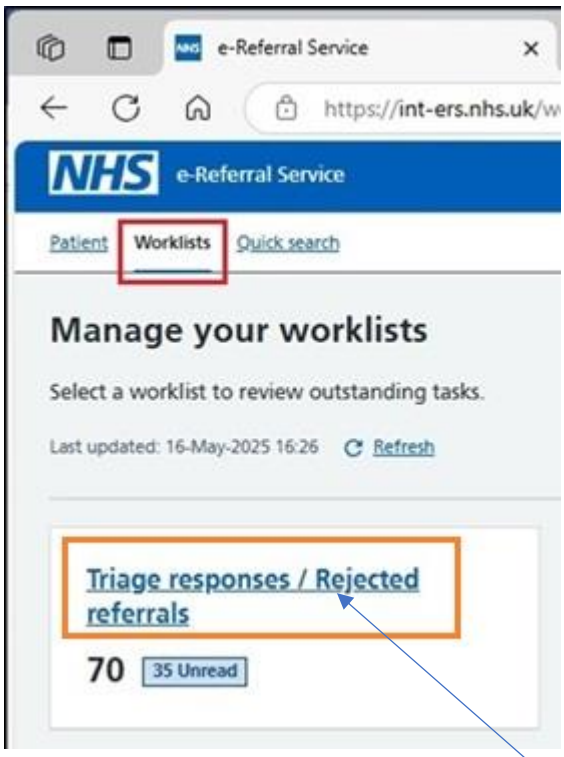
The Worklists tab in e-RS is your central dashboard for managing patient referrals. Each referral is assigned a Unique Booking Reference Number (UBRN) and grouped into categories based on its status or required actions—such as “Awaiting Triage,” “Letter Required,” or “Ready to Book.” This dynamic tool 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.



Using and Navigating the Worklist

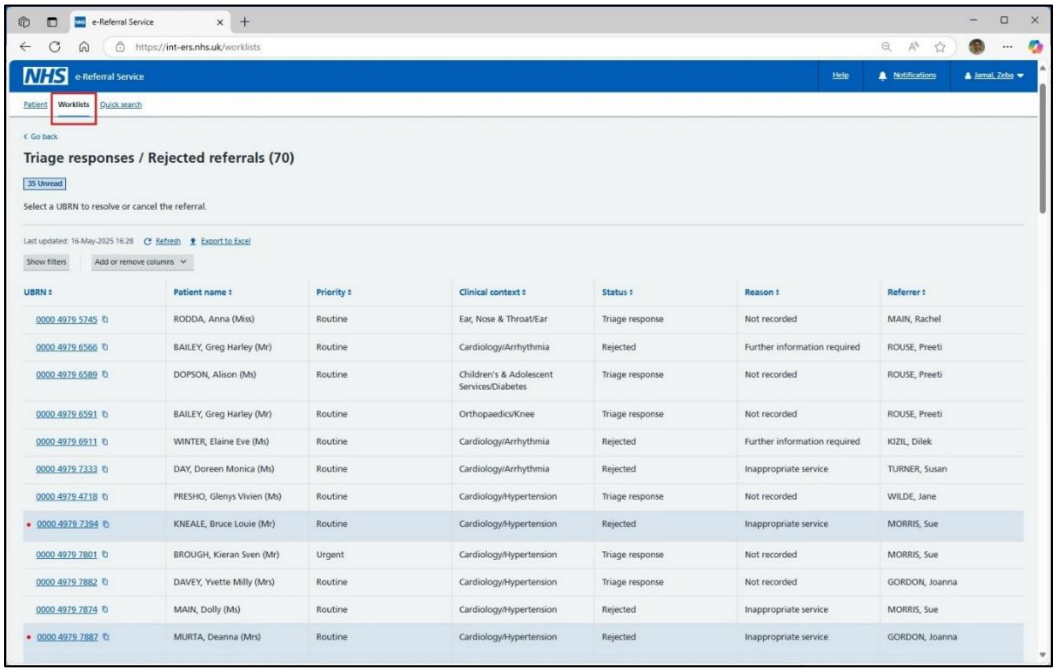
The Worklist offers powerful features to help you manage referrals efficiently. You can filter by specialty, urgency, or referral status, and sort by date or team assignment. Clicking on a referral lets you view patient details, upload documents, book appointments, and add notes for team visibility. 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:

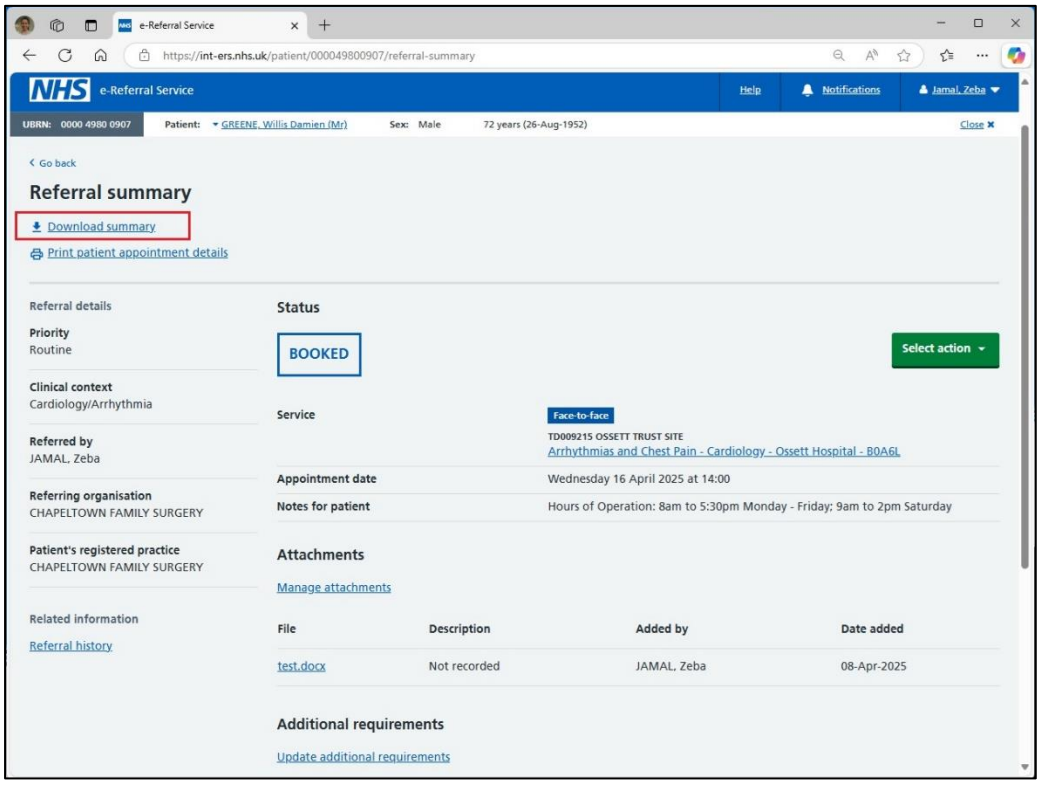


UBRN	Patient name	Priority	Clinical context	Status	Reason	Referrer
0000 4979 5745	RODDA, Anna (Miss)	Routine	Ear, Nose & Throat/Ear	Triage response	Not recorded	MAIN, Rachel
0000 4979 6566	BAILEY, Greg Harley (Mr)	Routine	Cardiology/Arrhythmia	Rejected	Further information required	ROUSE, Preeti
0000 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	PRESHO, Glenys Vivien (Ms)	Routine	Cardiology/Hypertension	Triage response	Not recorded	WILDE, Jane
0000 4979 7394	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 7874	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

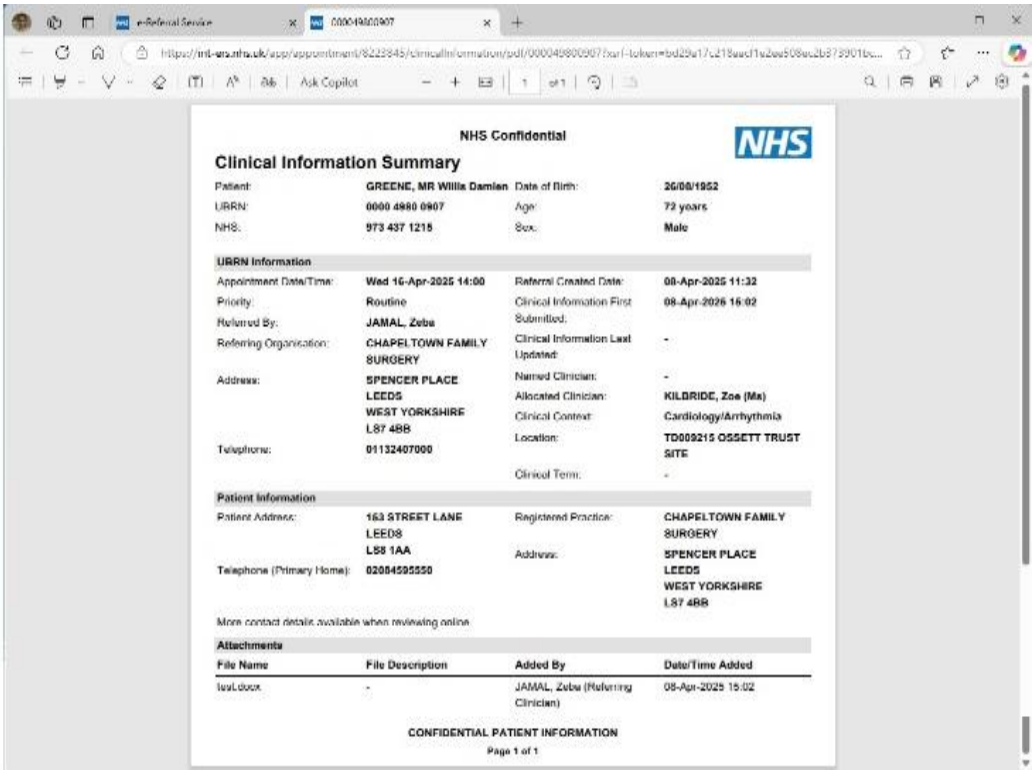
20. The darker **blue** bar rows with the **red** dot highlights any new items on the list.
21. To go back to the previous screen click on the hyperlink < Go back located at the top left hand corner.

- Download Summary

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

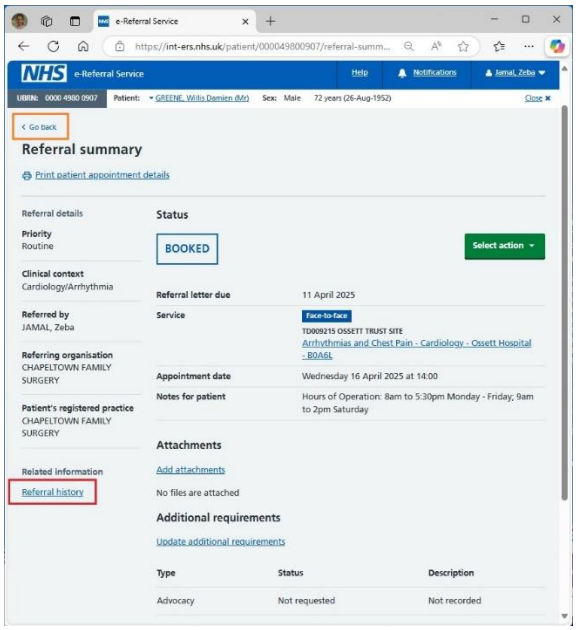


23. The **download summary** shows the clinical information summary of the referral in a separate tab. Save this as a PDF and attach to the patient record.

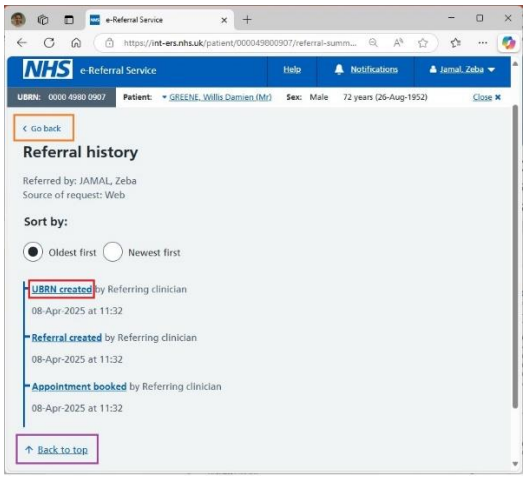


- Referral History

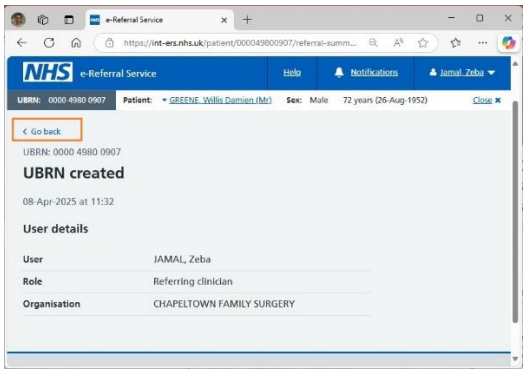
24. To view the referral history Click on Referral history hyperlink



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.

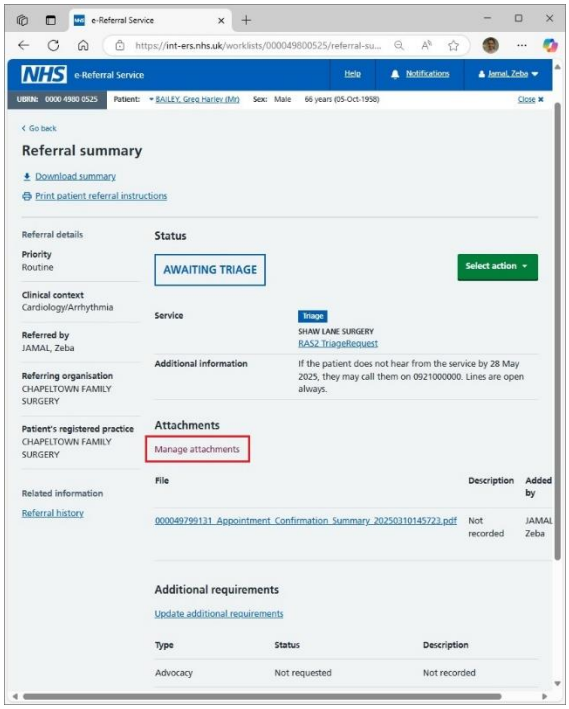


26. The URBN created screen shows more information regarding what actions were done on the referral and who did it and in which organisation.

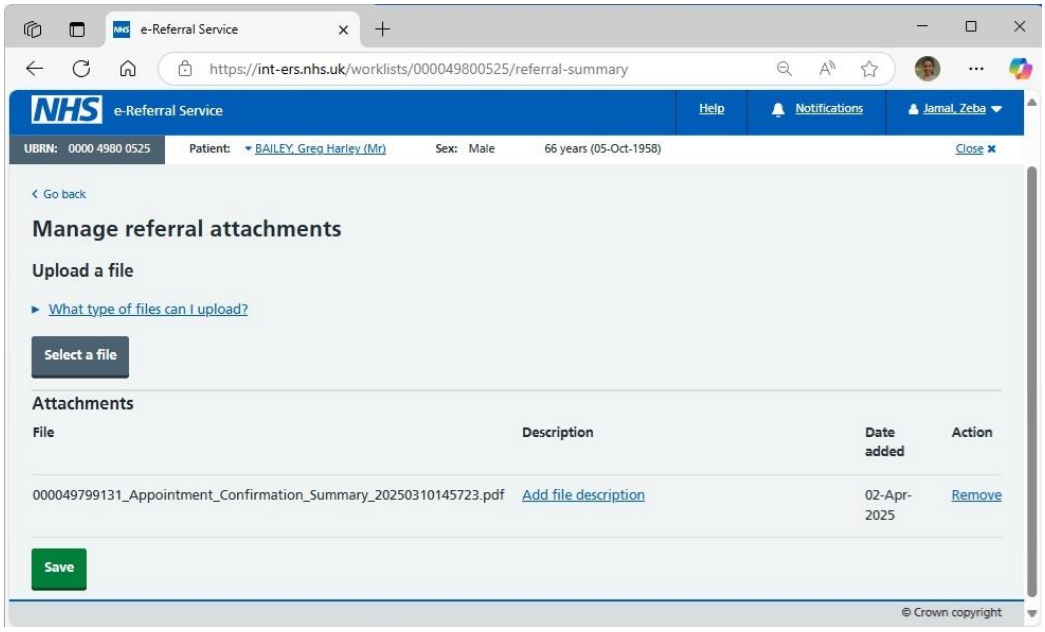


- Manage attachments

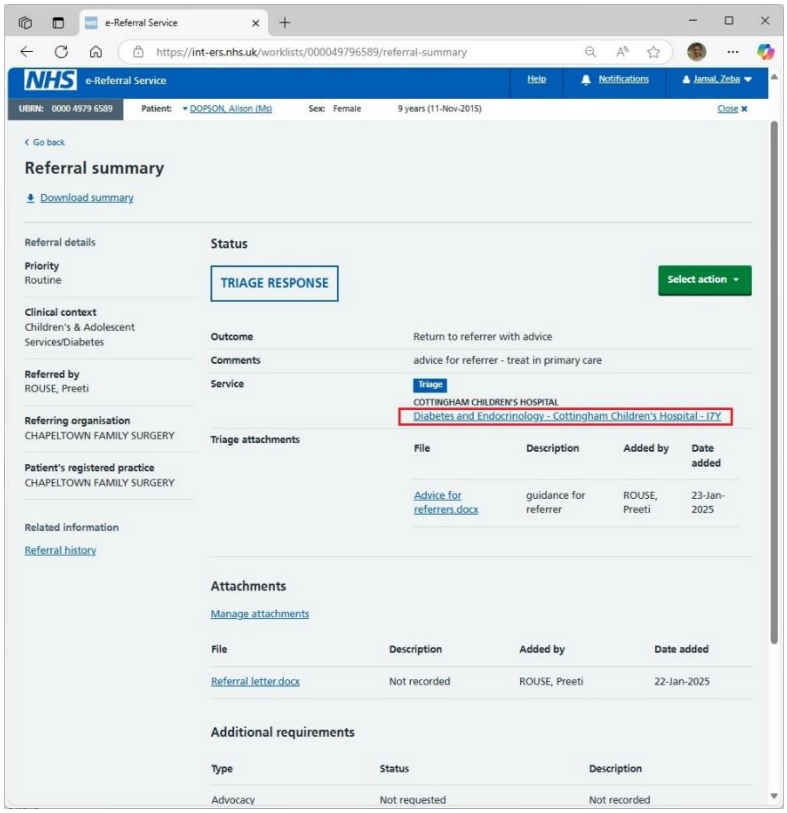
27. To add or remove attachments or letters click on Manage attachments



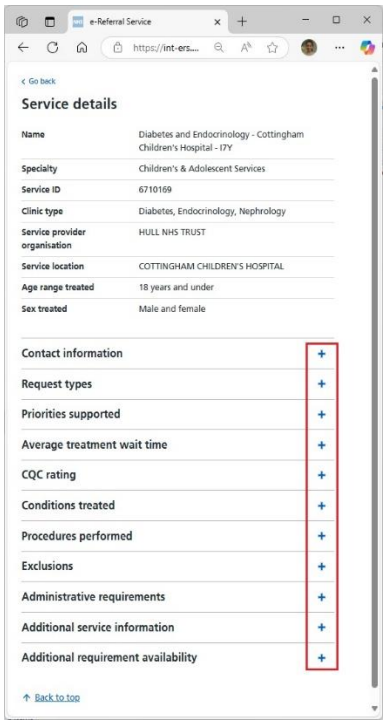
28. Select the file you want to add or remove.



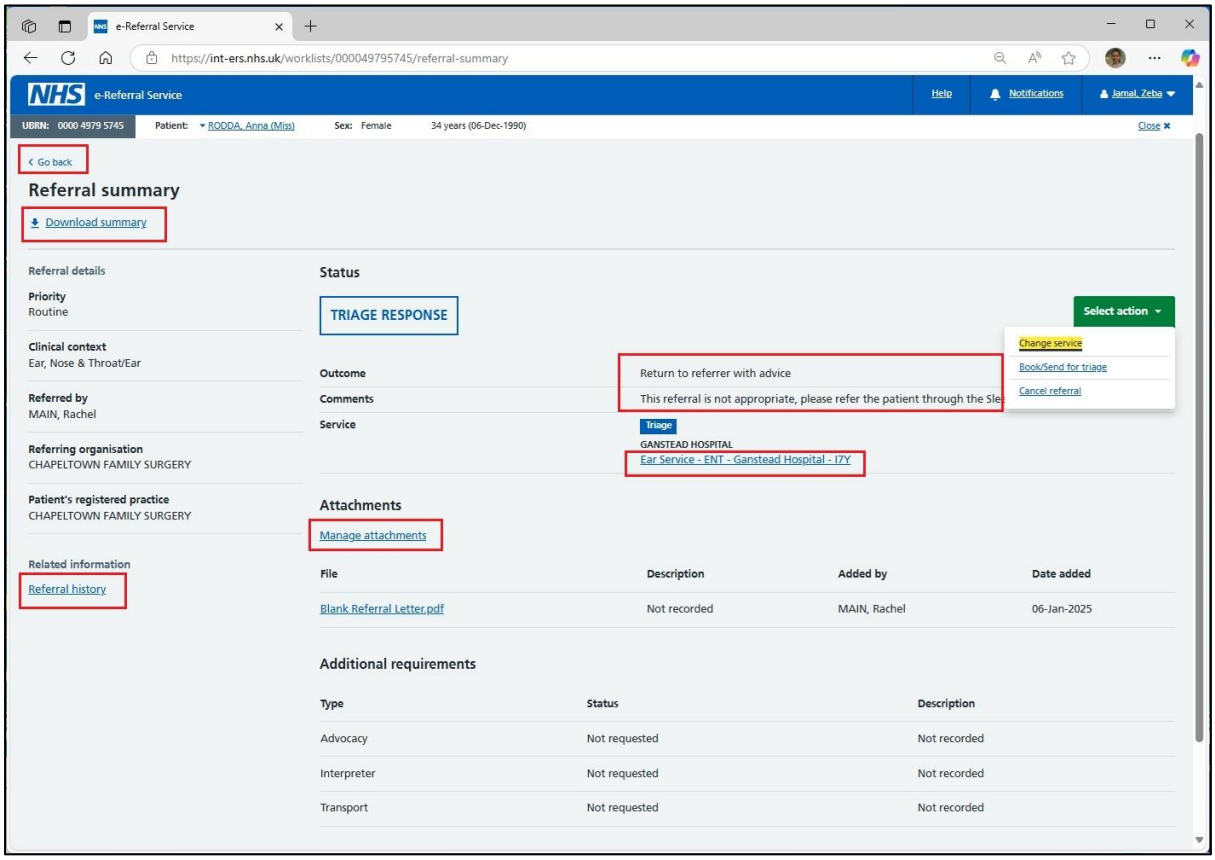
29. To find more information regarding the Service or contact details click on the Service hyperlink name as highlighted in red below:



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

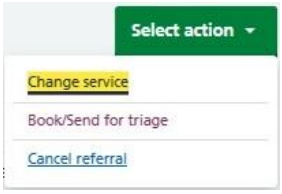


31. To view the service provider response look at the **Outcome** and **Comments** rows under the **Status** column



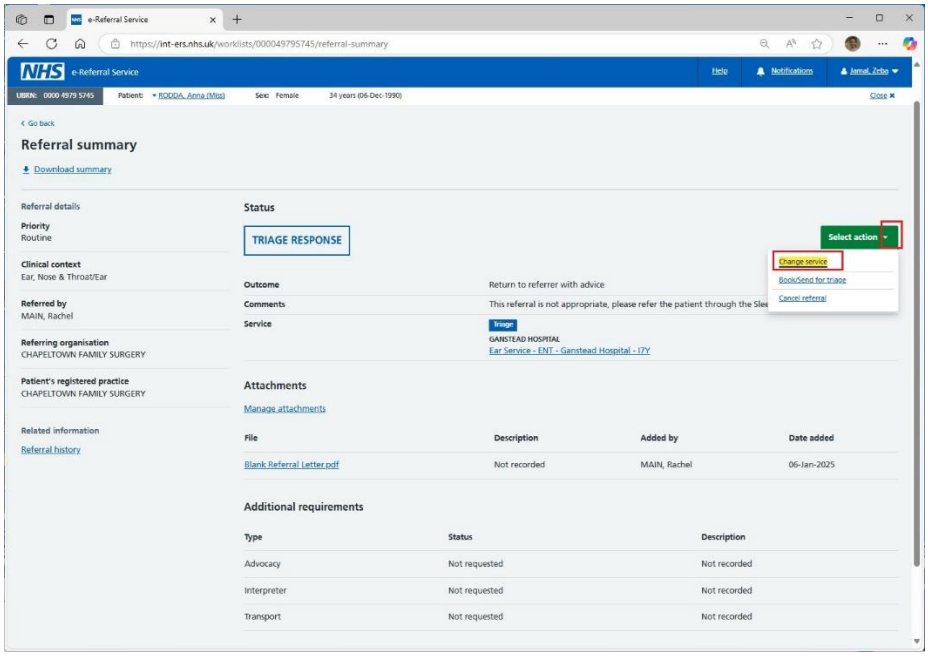
32. To action a triage response on the Referral summary screen click on the **select action** dropdown arrow and pick one of the 3 options as per screen shot below:

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

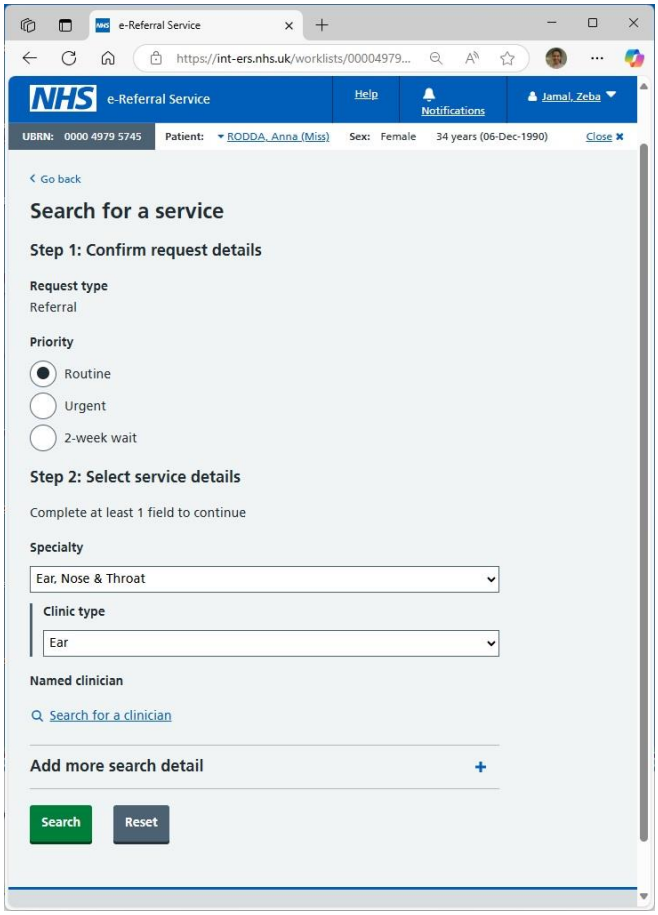


A. Select action– Change Service

33. Click on the green drop down list for the following Action **Change service** to get **Search for a service** screen

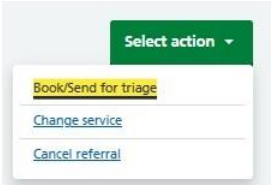


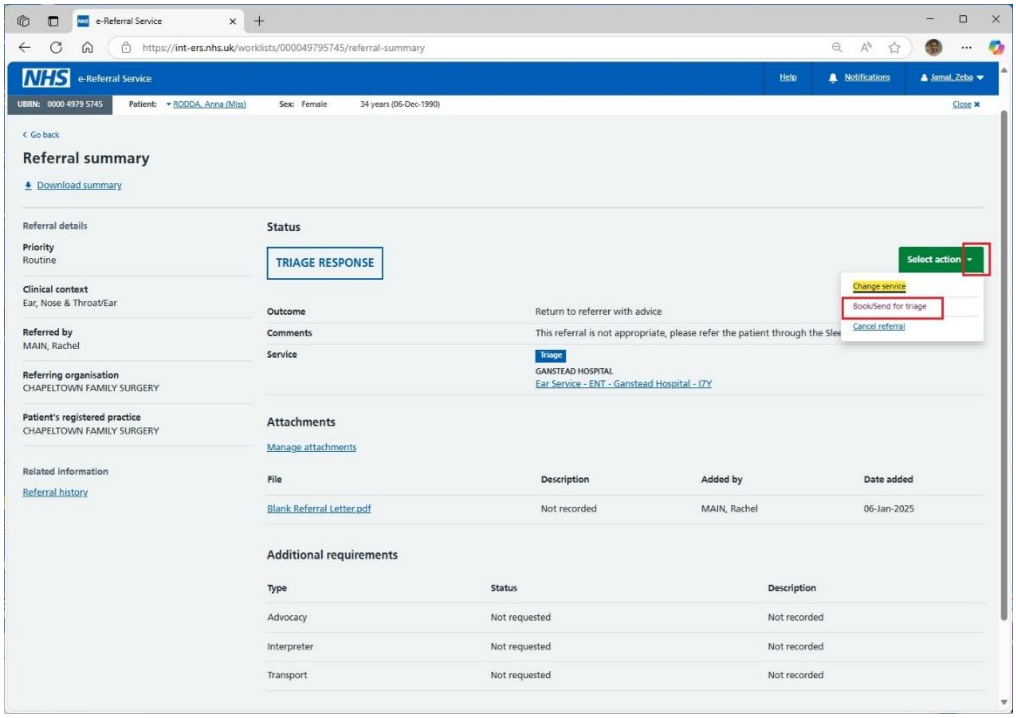
34. The user can now search for another service and refer the patient into an appropirate clinic.



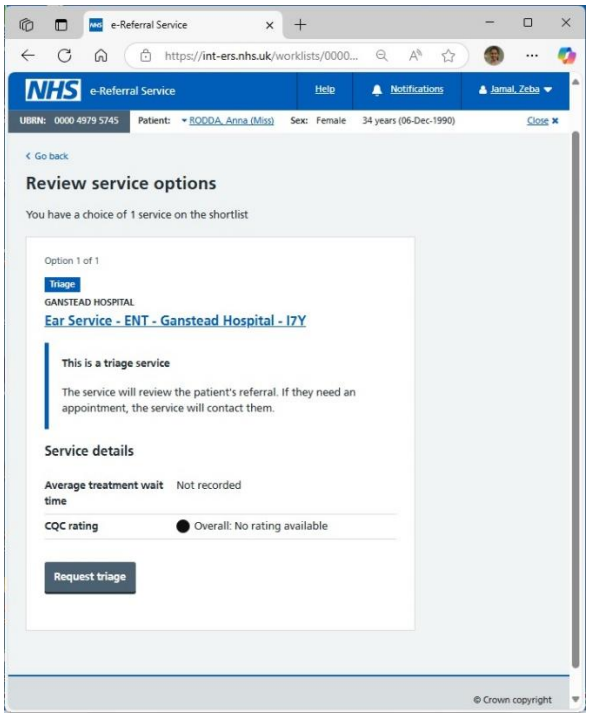
B. Select action– Book Send for Triage

35. Click on the green drop down list for the following Action **Book /Send for Triage** to get **Search for a service** screen

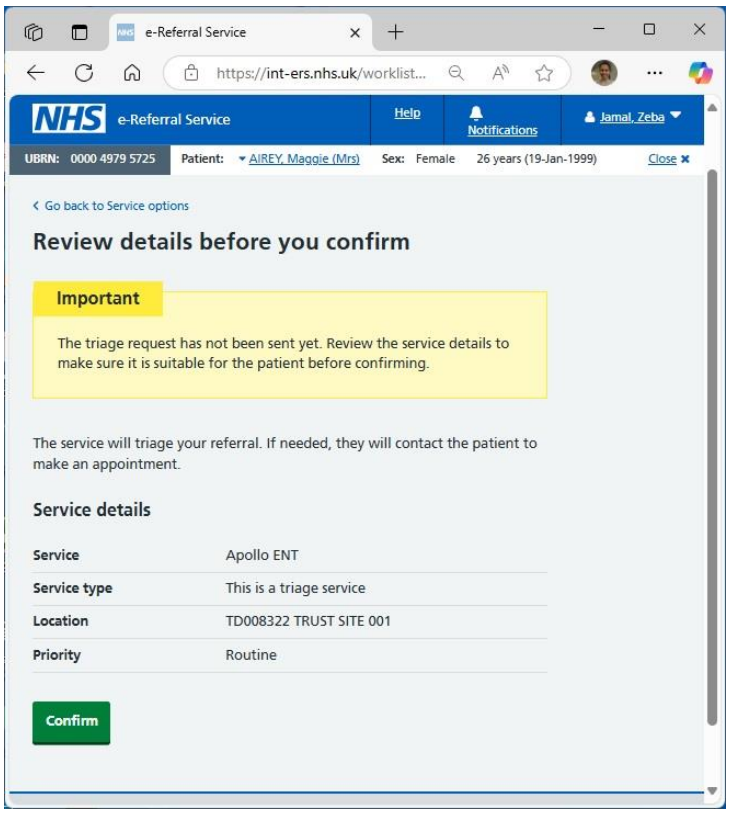




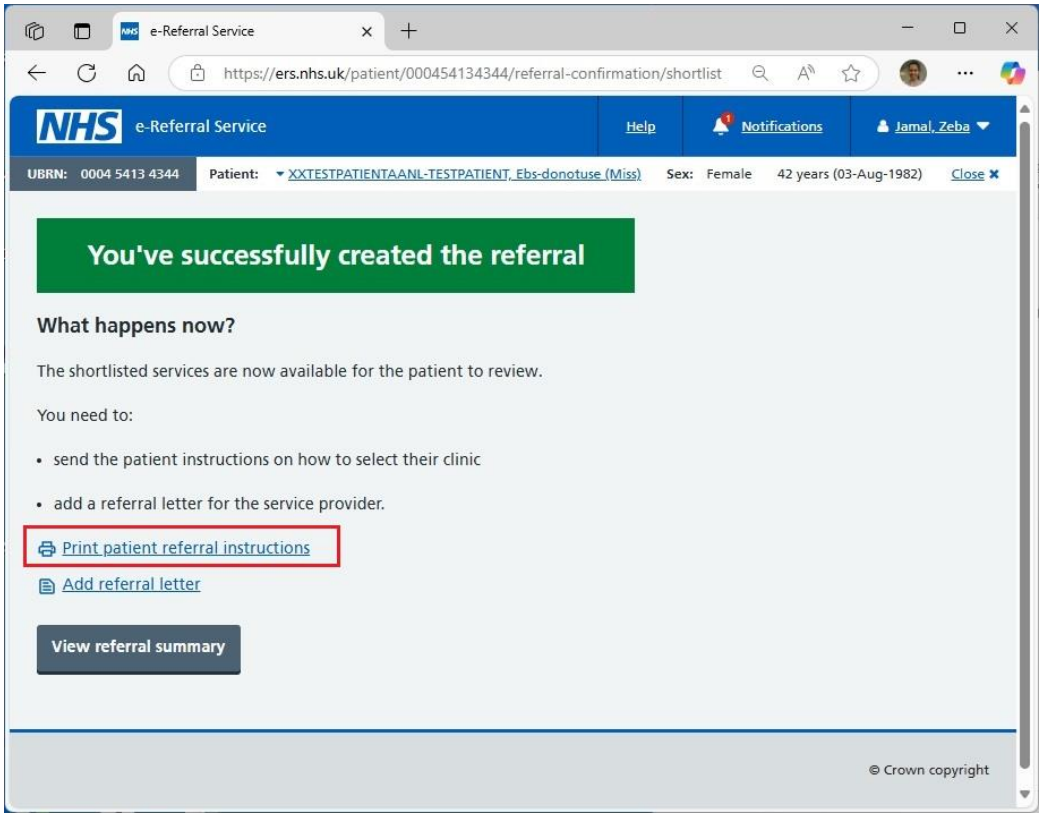
36. Click on request triage if that is the service you want to select.



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

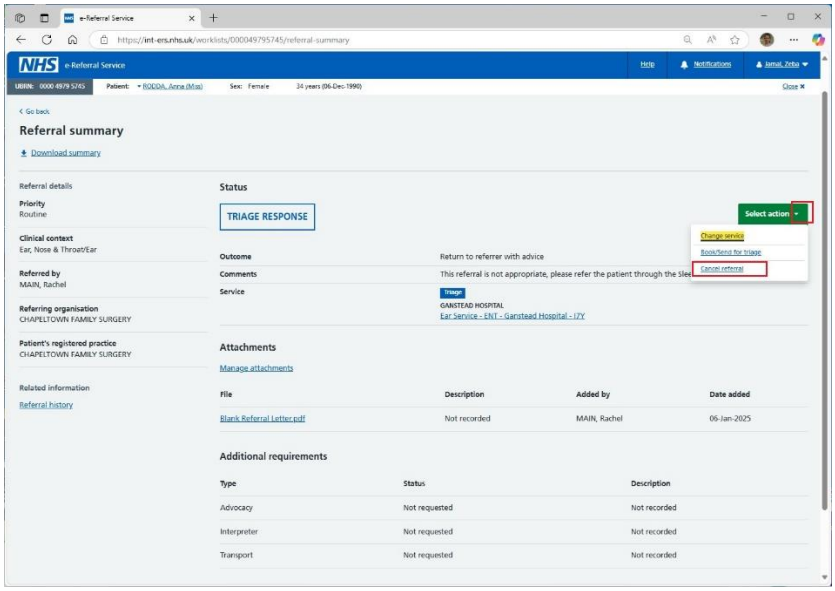


38. Once you have confirmed you choice Print out the patient referral instructions and send them to the patient. Then, click on **View referral summary** to take you back to the Referral summary screen.

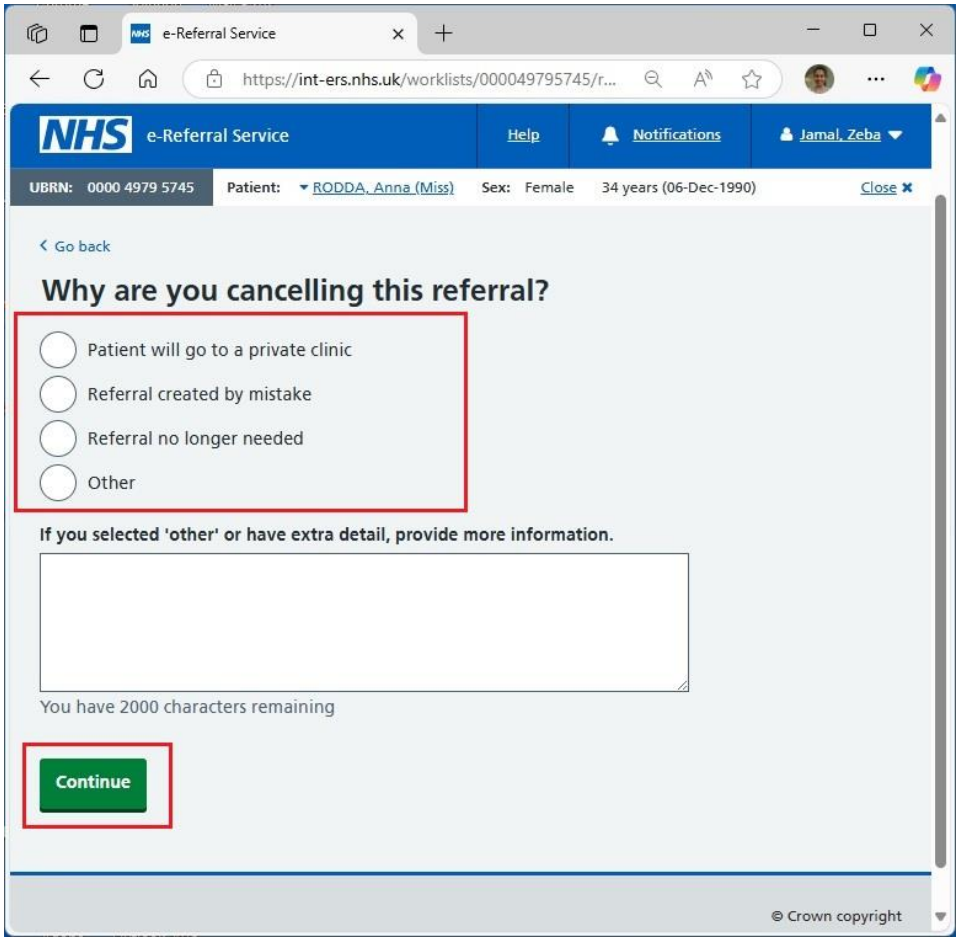


C. Select Action – Cancel referral

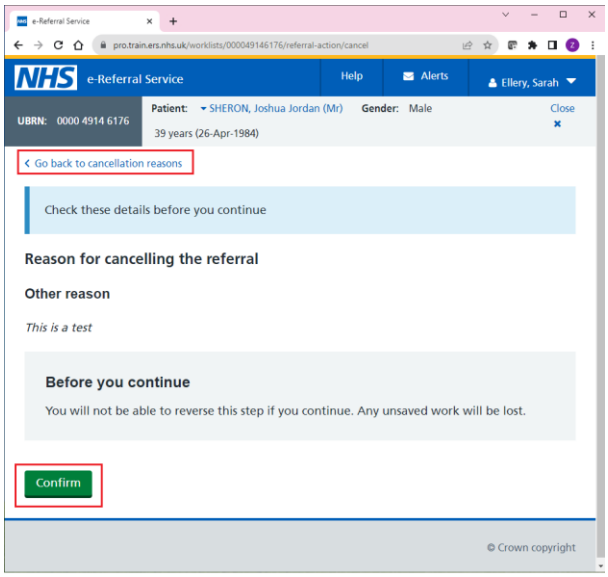
39. Click on the green drop down list for the following Action **Cancel referral** to end the triage.



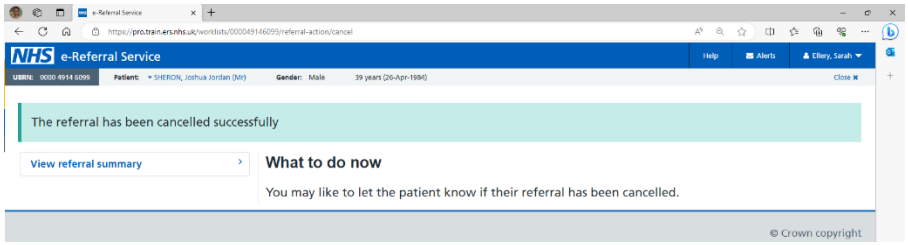
40. Click on the reason for cancelling (ending) the triage usually the referrer has provided information to proceed treatment in primary care or booked outside e-RS so you can remove the referral as it's journey has been completed.



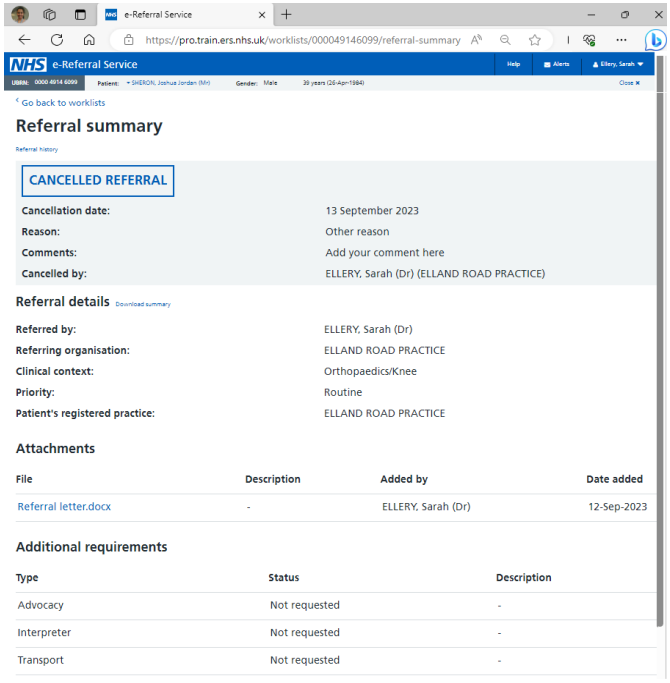
41. Follow the online instructions to check and remove the triage .



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.

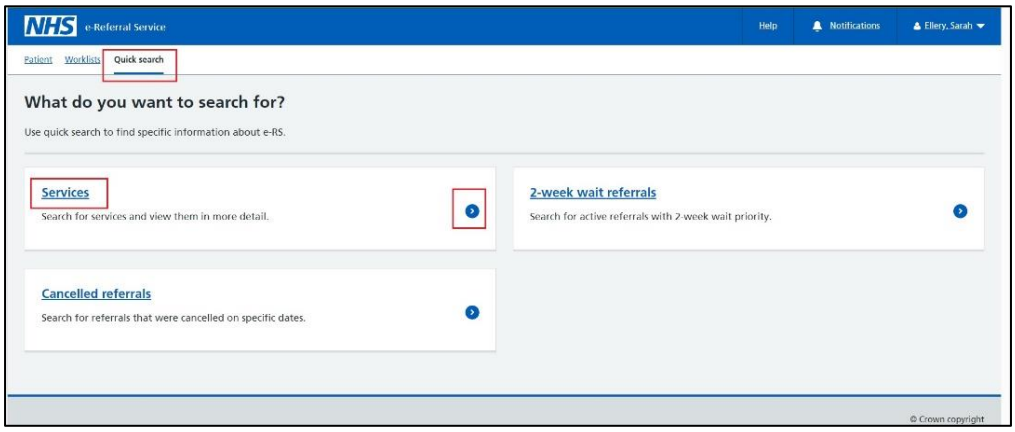
- Referrals pending external action

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 don't 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.

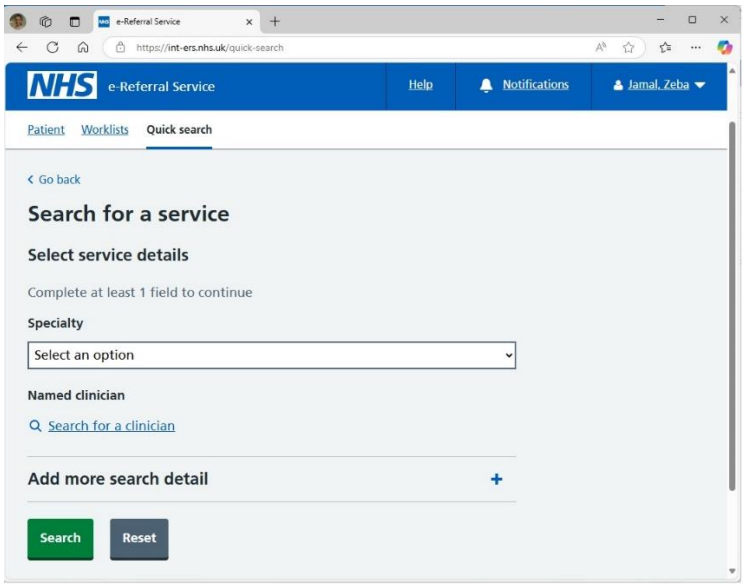
Quick search Tab

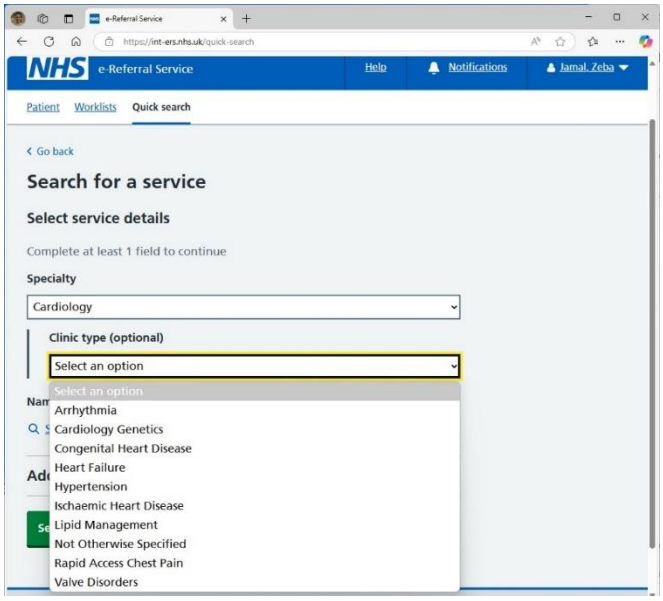
NHS e-RS hosts a large online directory of services that contains detailed service information. This helps referrers ensure that patients are booked into the most appropriate service for their clinical needs



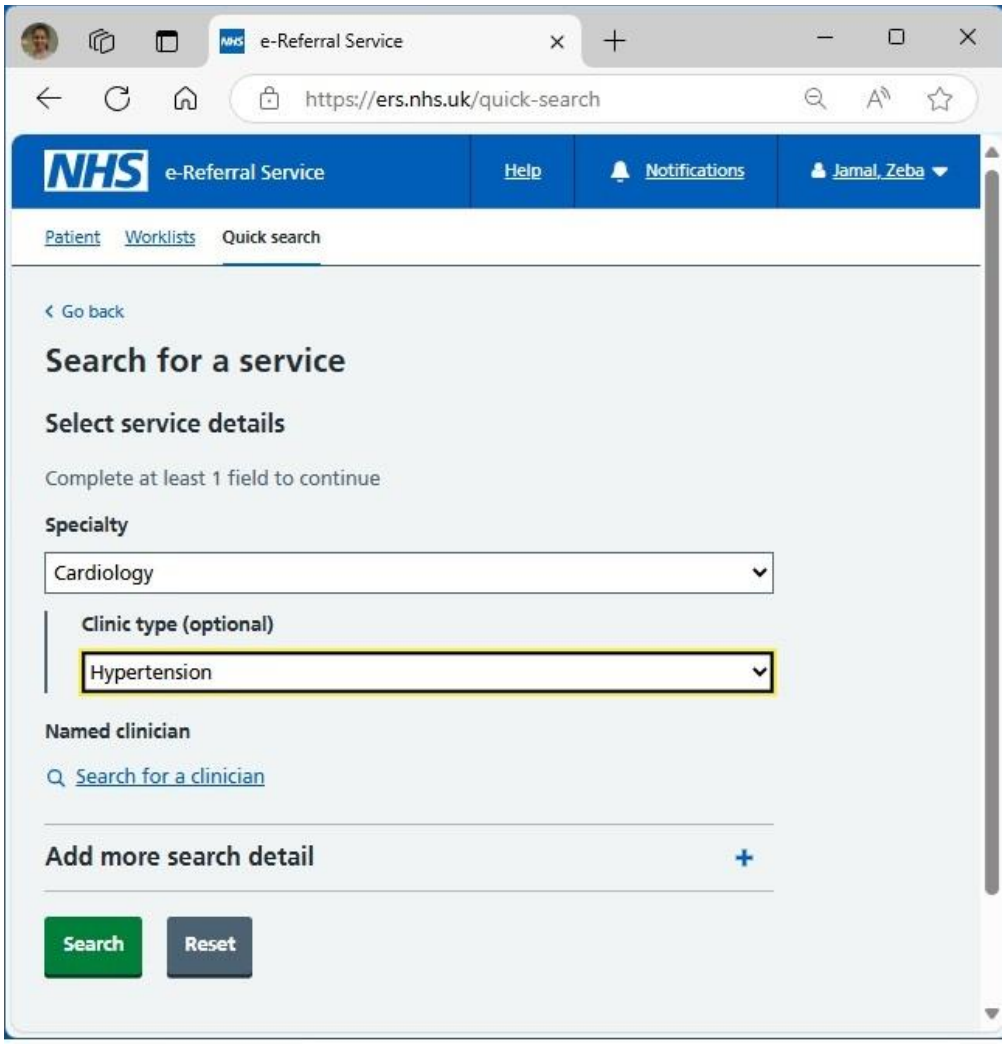
Search for a service using - Speciality & Clinic Type

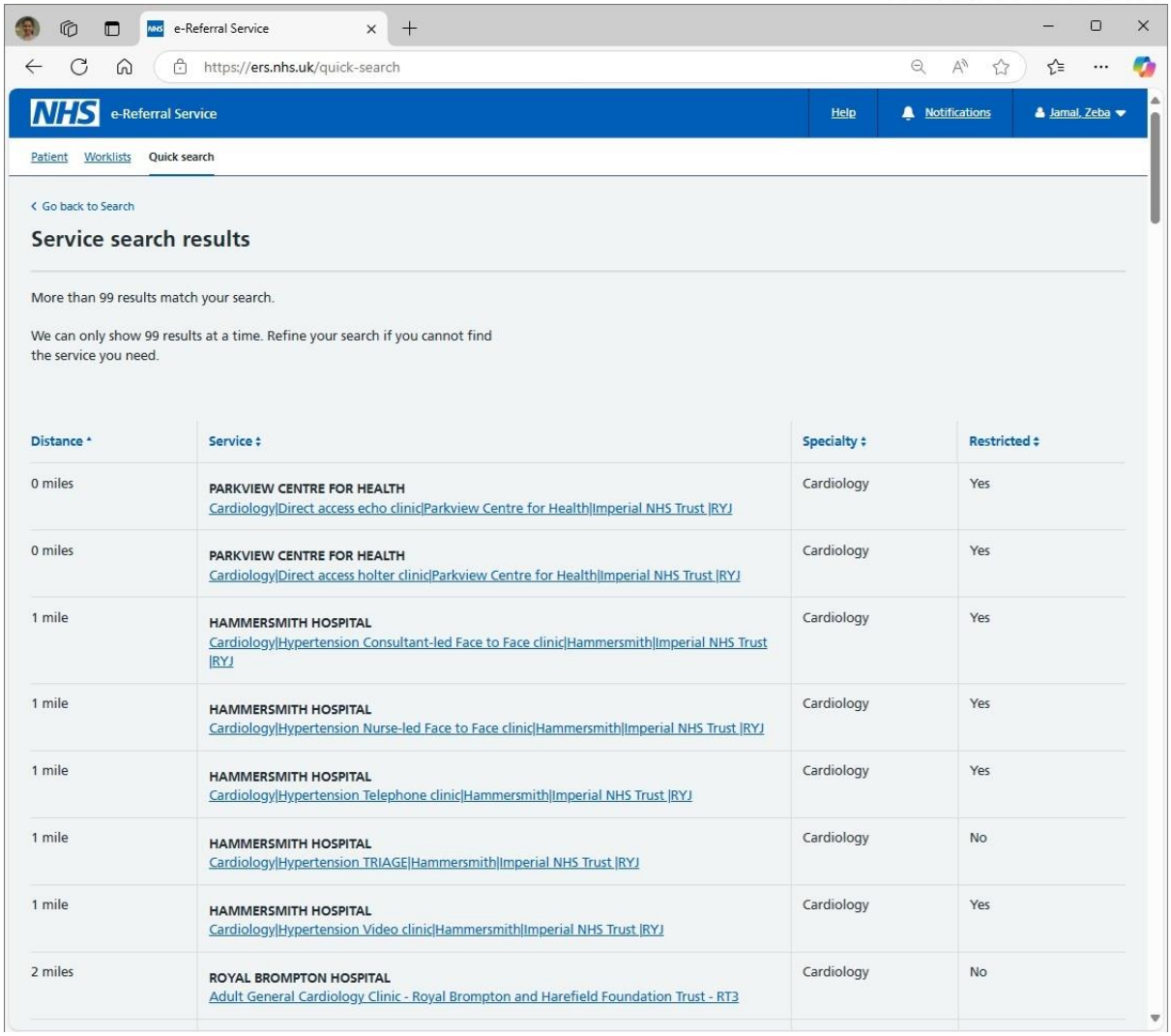
- Services



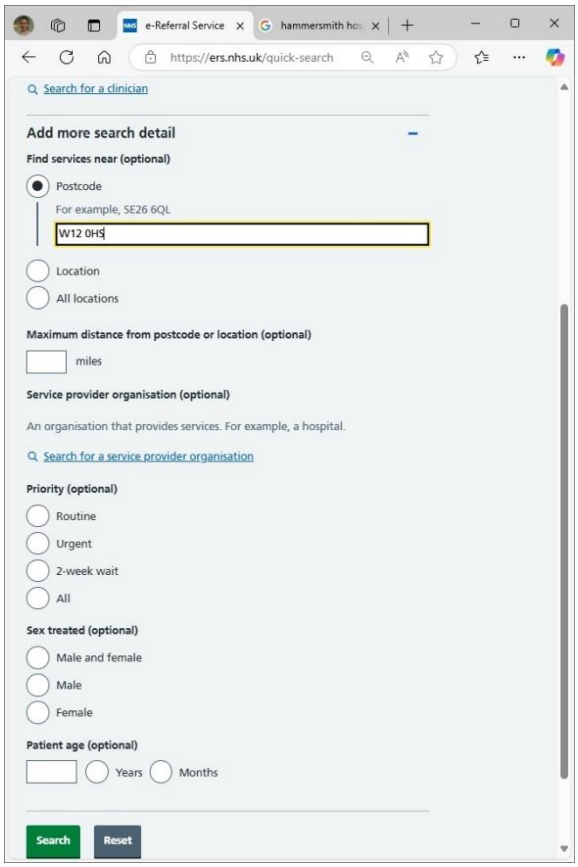


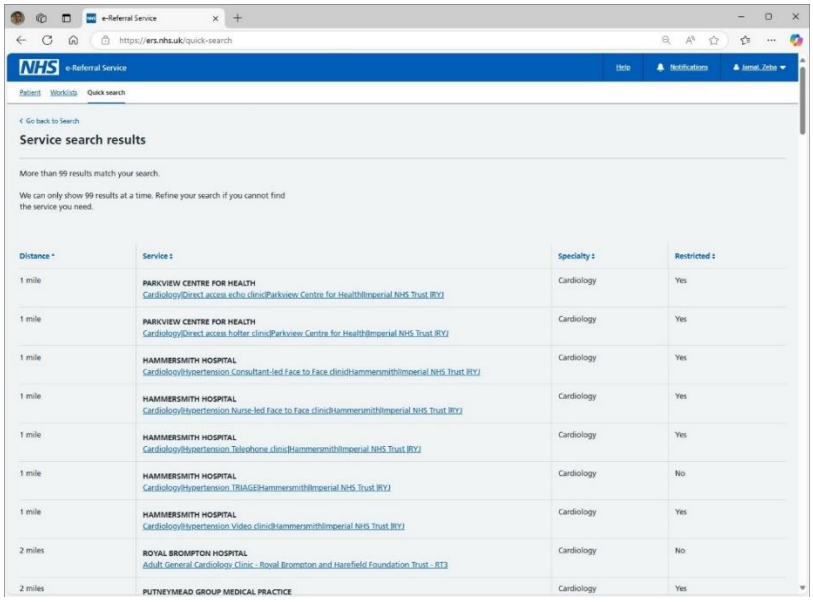
Search for a service using Speciality & Clinic Type




e-Referral Service
https://ers.nhs.uk/quick-search
NHS e-Referral Service
Help
Notifications
Jamal, Zeba
Patient
Worklists
Quick search
Go back to Search
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 |RYJ
Cardiology
Yes
0 miles
PARKVIEW CENTRE FOR HEALTH
Cardiology|Direct access holter clinic|Parkview Centre for Health|Imperial NHS Trust |RYJ
Cardiology
Yes
1 mile
HAMMERSMITH HOSPITAL
Cardiology|Hypertension Consultant-led Face to Face clinic|Hammersmith|Imperial NHS Trust |RYJ
Cardiology
Yes
1 mile
HAMMERSMITH HOSPITAL
Cardiology|Hypertension Nurse-led Face to Face clinic|Hammersmith|Imperial NHS Trust |RYJ
Cardiology
Yes
1 mile
HAMMERSMITH HOSPITAL
Cardiology|Hypertension Telephone clinic|Hammersmith|Imperial NHS Trust |RYJ
Cardiology
Yes
1 mile
HAMMERSMITH HOSPITAL
Cardiology|Hypertension TRIAGE|Hammersmith|Imperial NHS Trust |RYJ
Cardiology
No
1 mile
HAMMERSMITH HOSPITAL
Cardiology|Hypertension Video clinic|Hammersmith|Imperial NHS Trust |RYJ
Cardiology
Yes
2 miles
ROYAL BROMPTON HOSPITAL
Adult General Cardiology Clinic - Royal Brompton and Harefield Foundation Trust - RT3
Cardiology
No

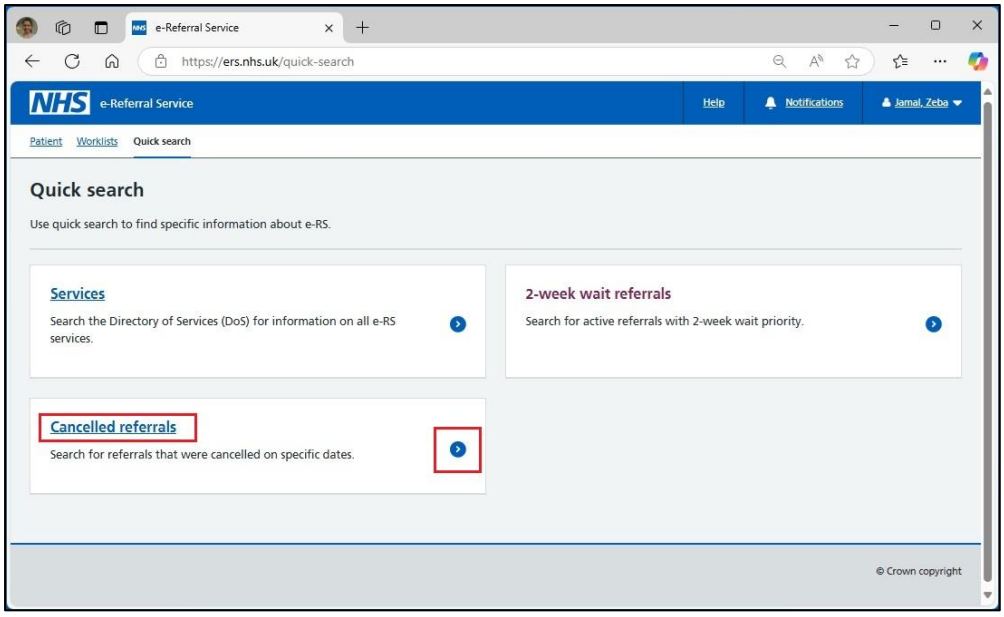
Search for a service using Postcode



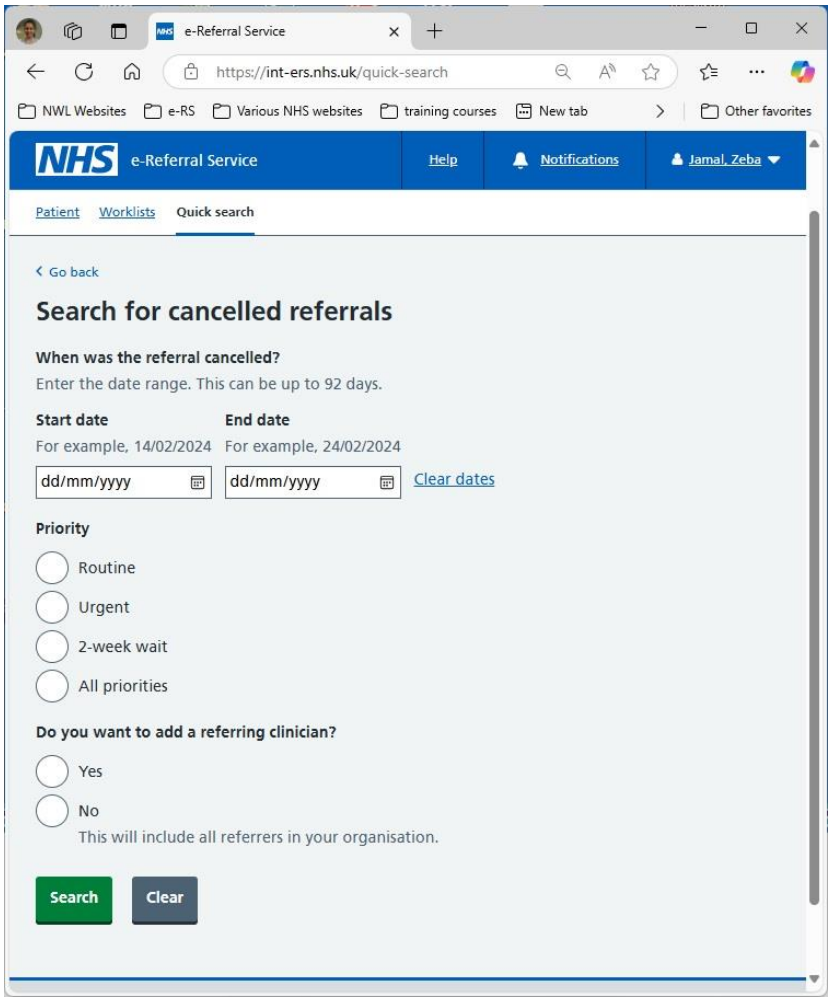


Cancelled referrals

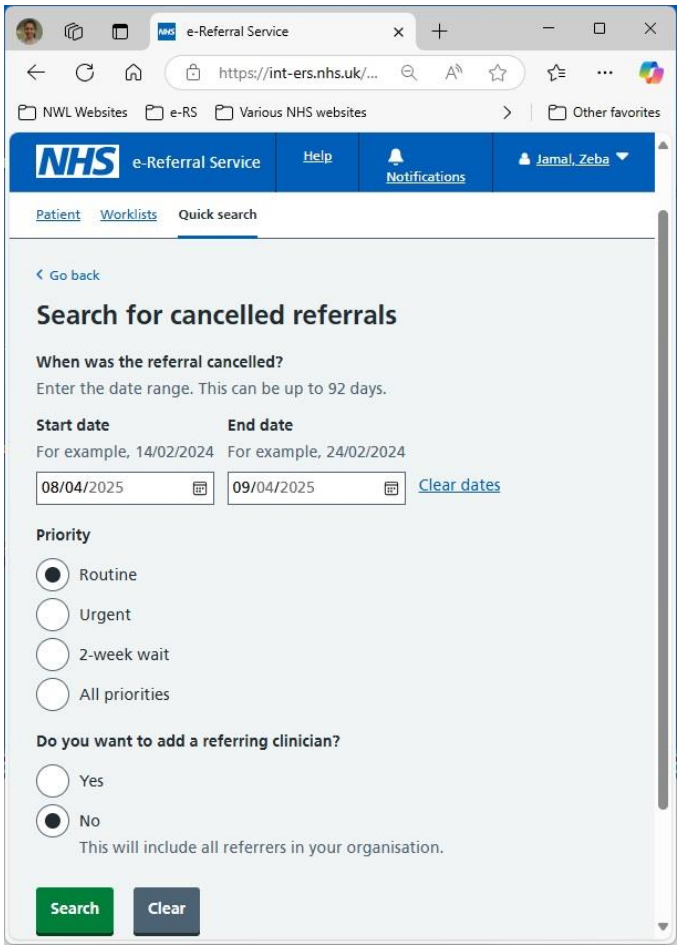
1. User can search for referrals that have been cancelled by specifying different date ranges.



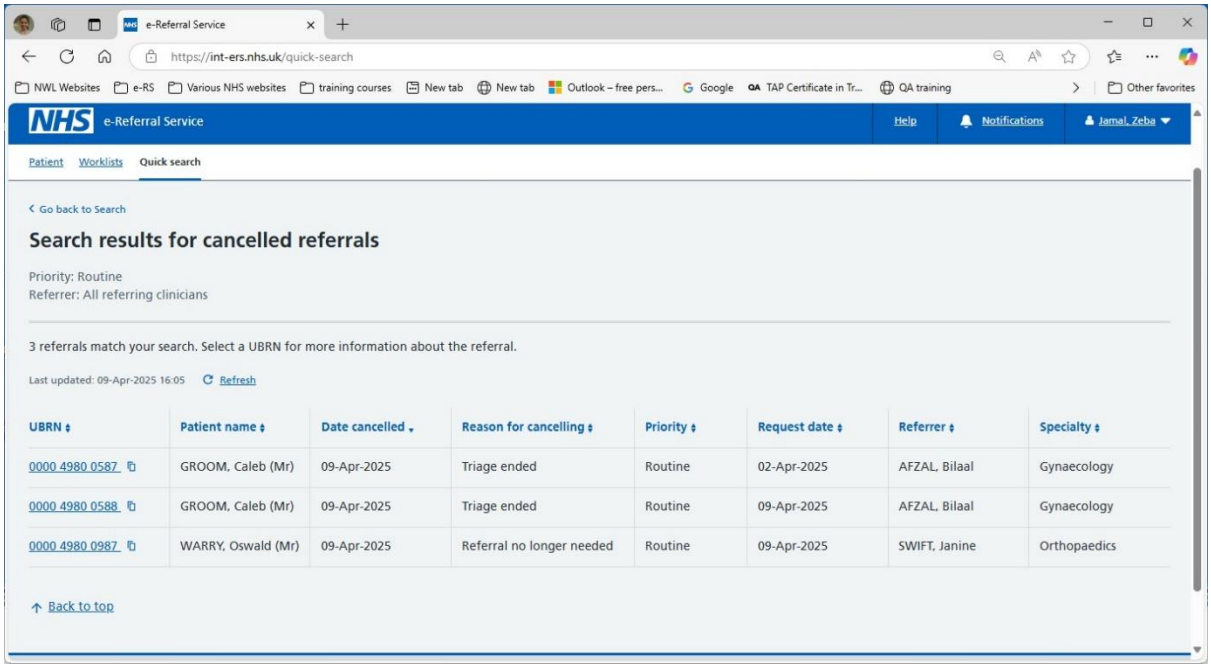
2. You can search between two dates up to 92 days apart.
    a. Can specify the Priority and referring clinicians name if required.



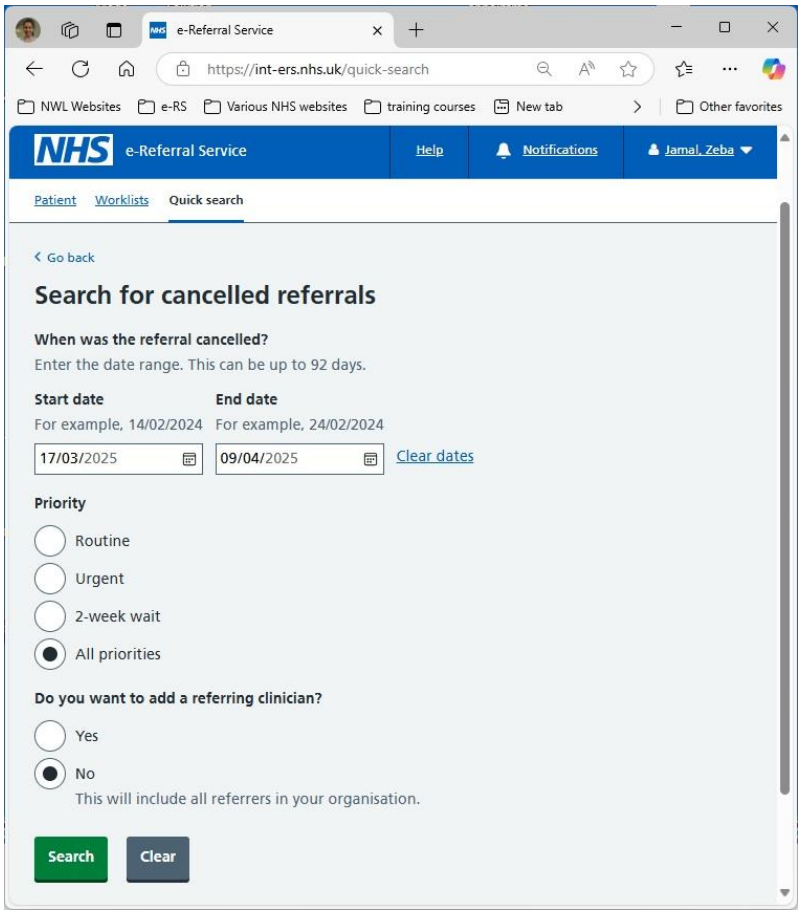
3. This is an example of a cancelled referral using the Routine Priority and including all the clinician's at the practice.



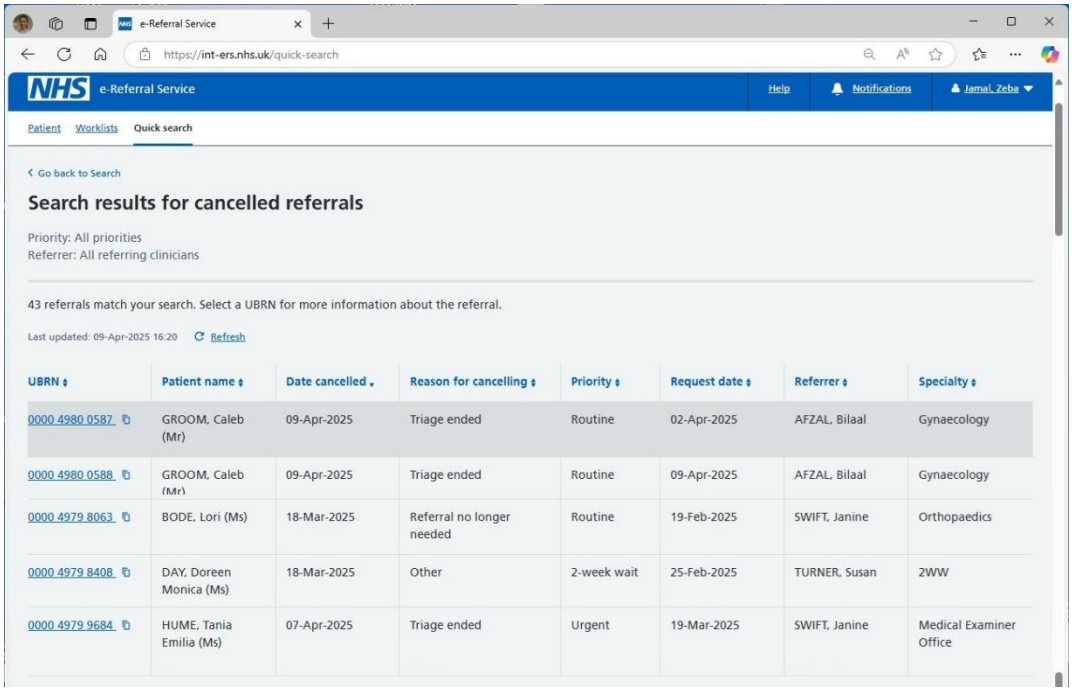
4. The search results page show the outcome of the above search.



5. The below is an example of cancelled referrals using the all priorities search criteria and all clinician's.

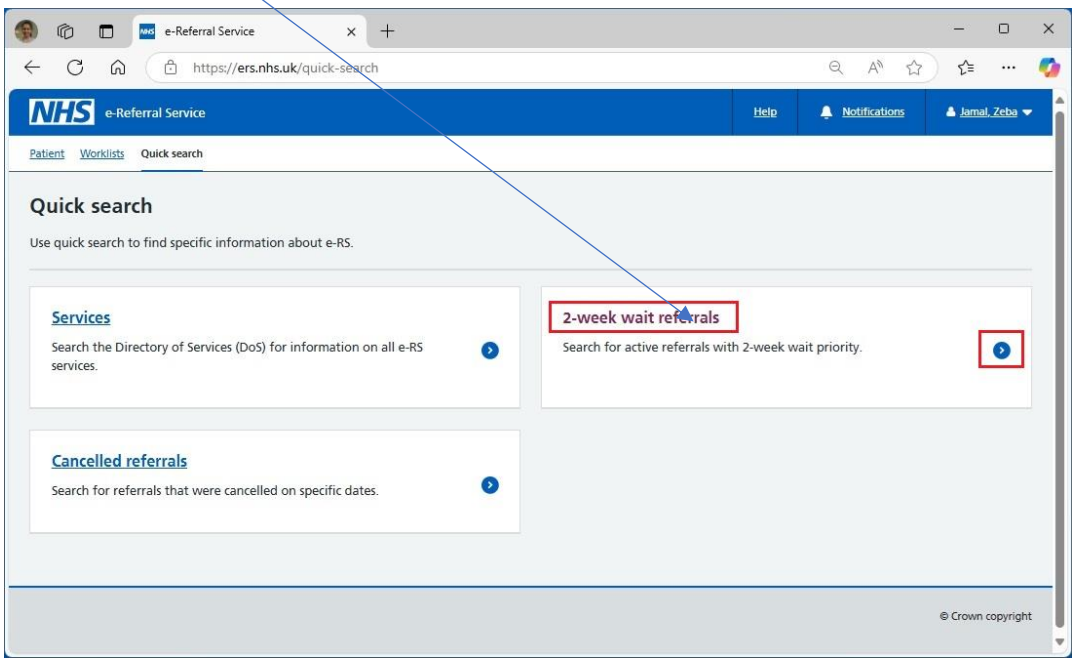


6. The screen shot below is the outcome of the above search.

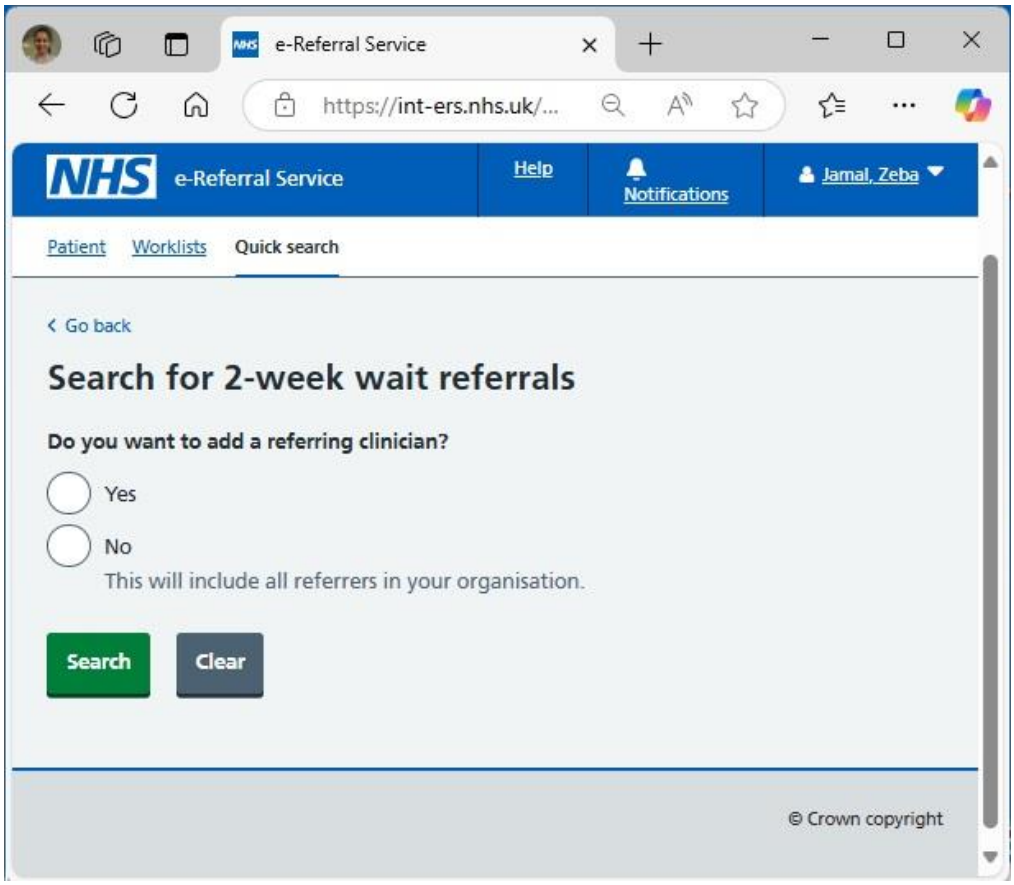


Quick Search using 2-week wait referrals Option

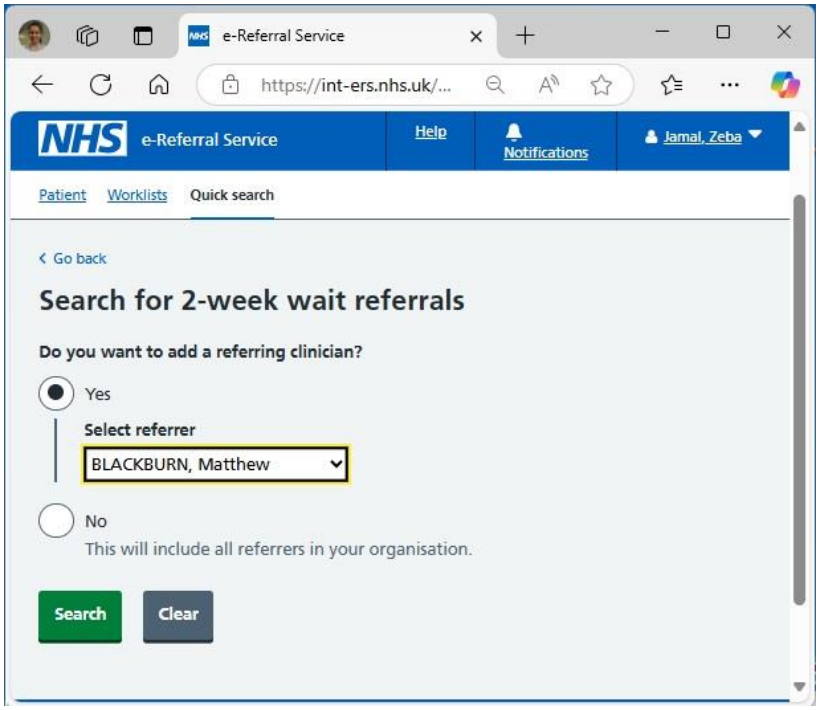
7. To search for referrals made in your practice that have a 2-week wait Priority click on the **2 week wait referrals** hyper link.



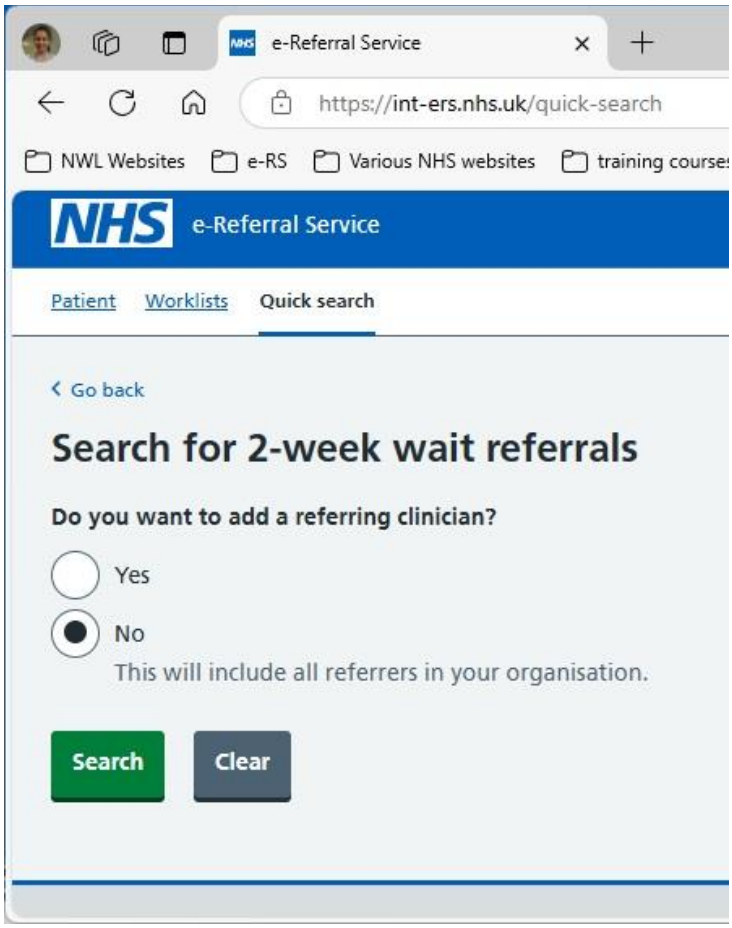
8. The user can specify by searching on a particular clinician or search on all clinicians at the practice.



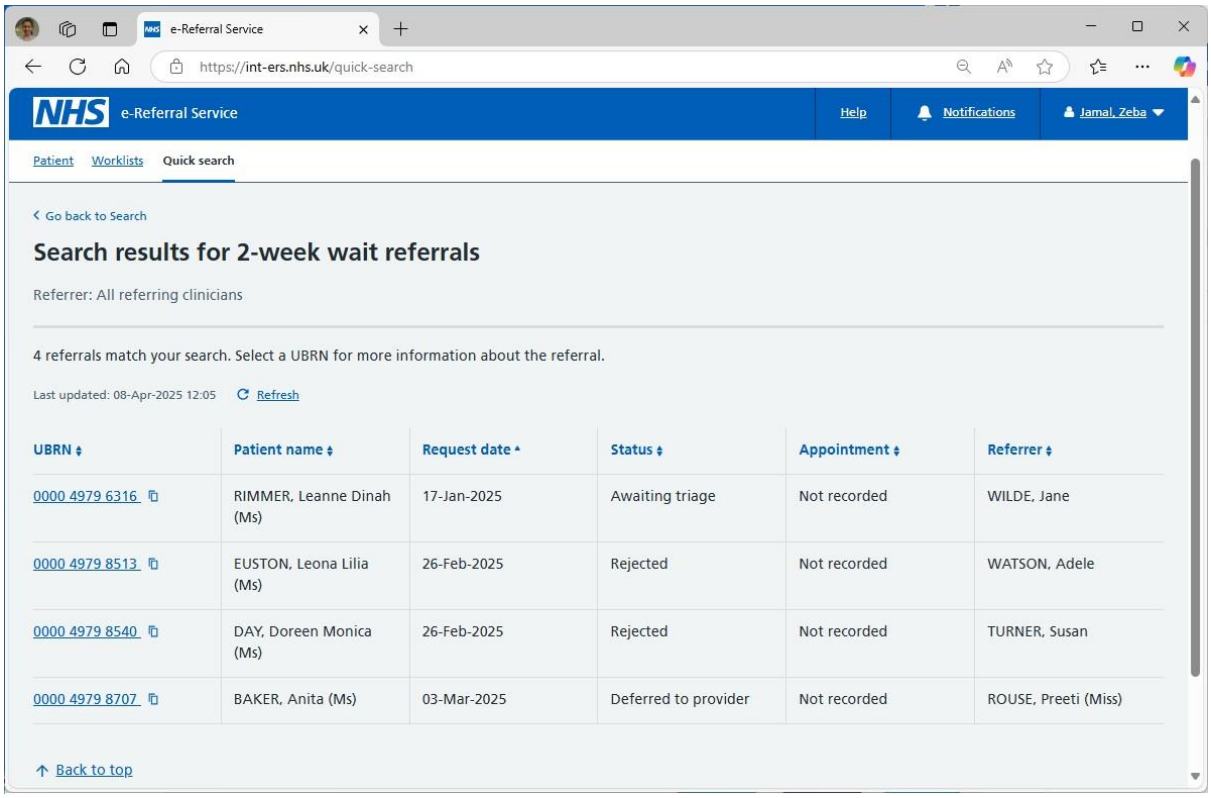
9. If you want to specify a particular, clinicians select the clinicians name using the dropdown list.



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



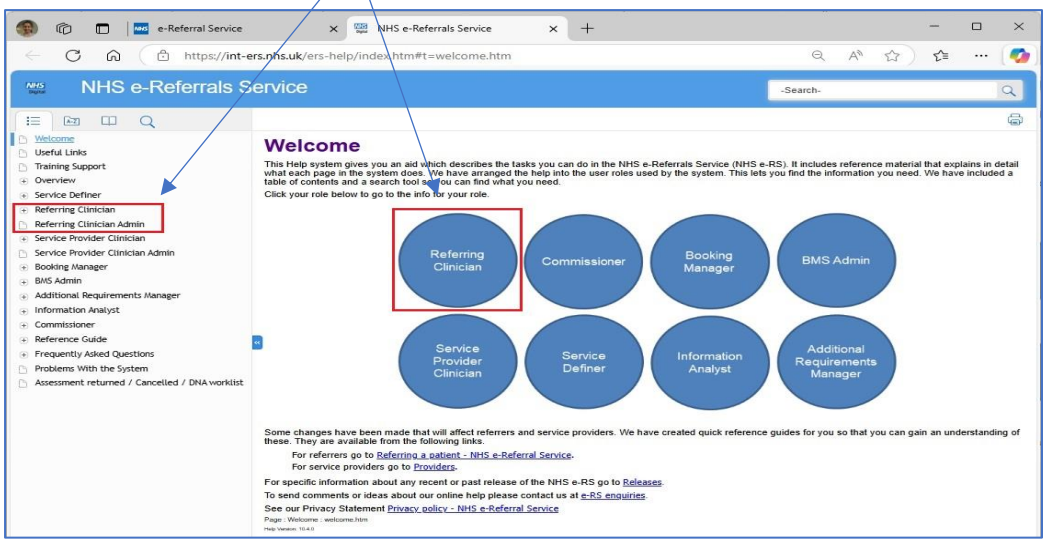
11. The search results are shown below for all the clinicians at the practice who have made a 2-week wait referral.



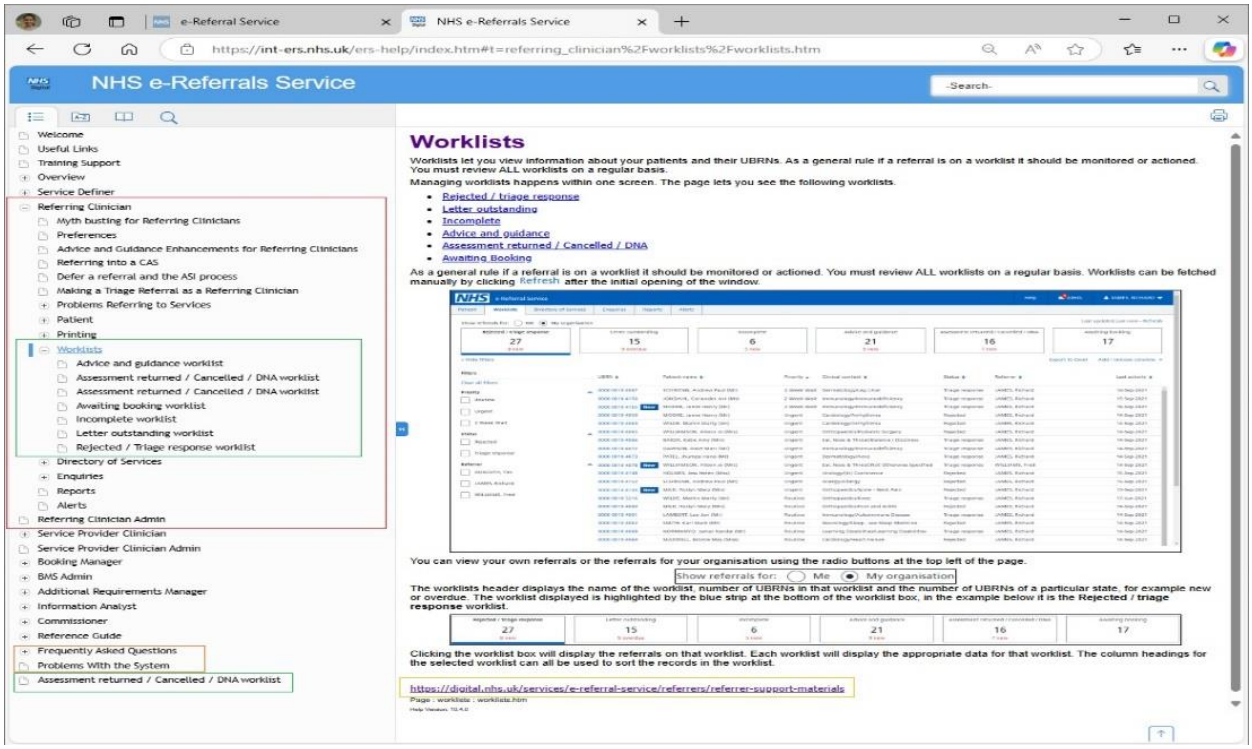
Help

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

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



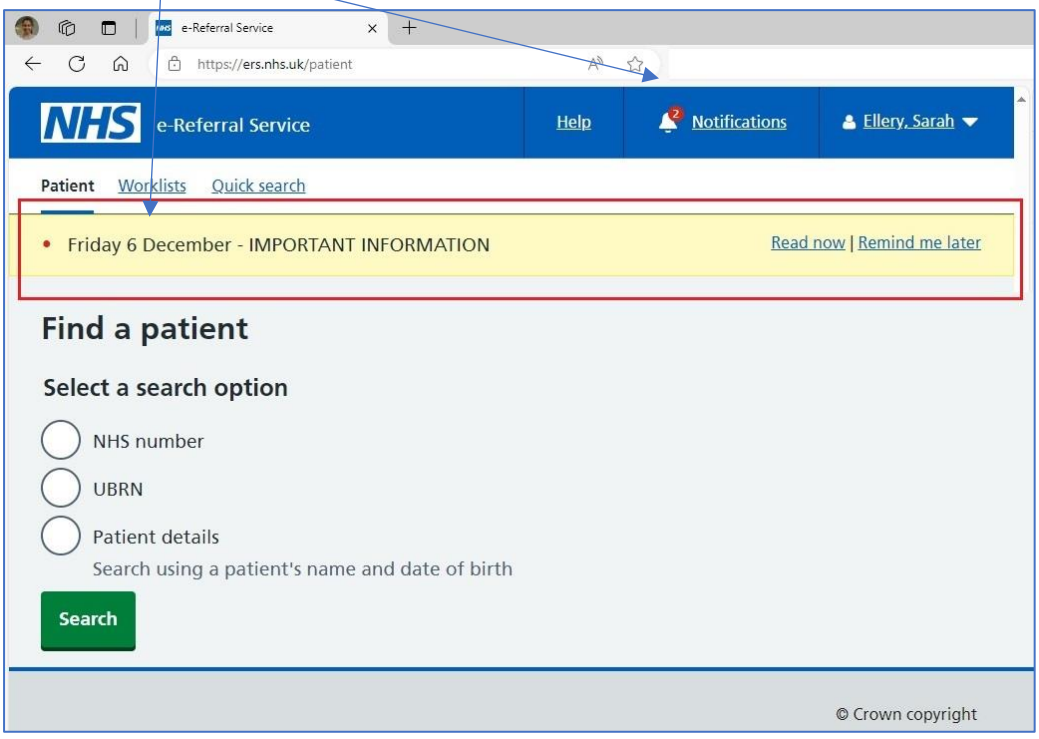
14. Click on the Worklists to get help



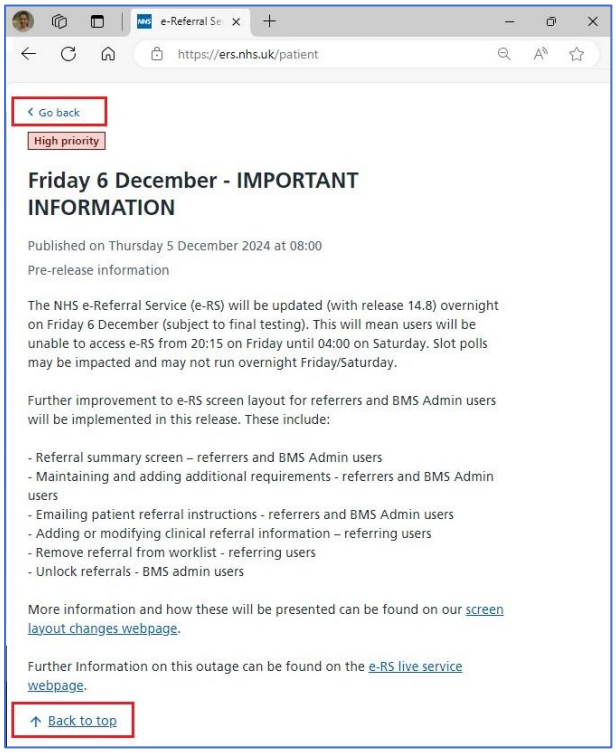
Notifications

Yellow Bar

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

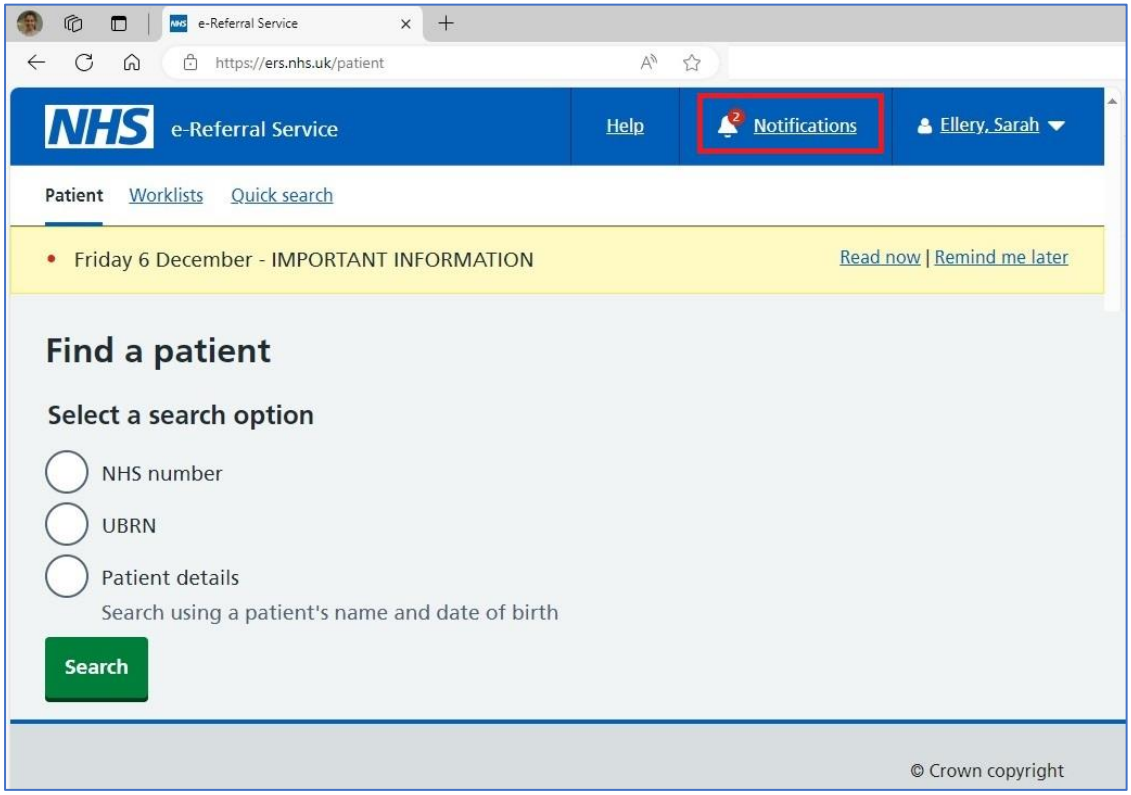


16. Once the user has read the notification they will need to click on the Go Back hyperlink located at the top left-hand corner to get back into the previous screen,

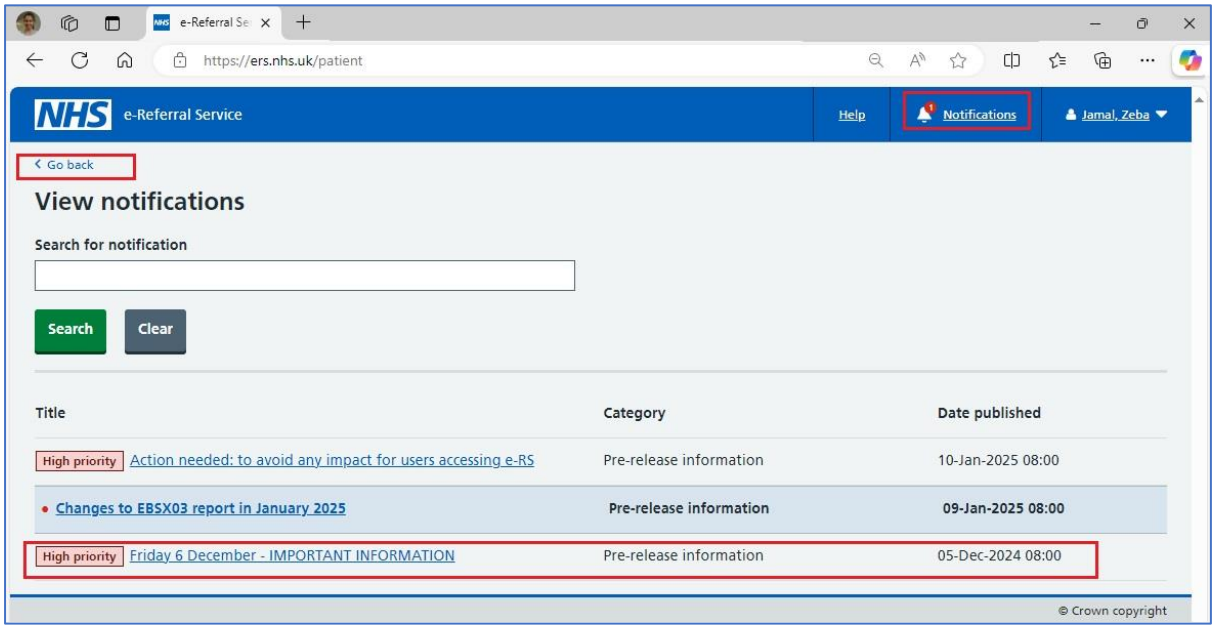


Blue Bar

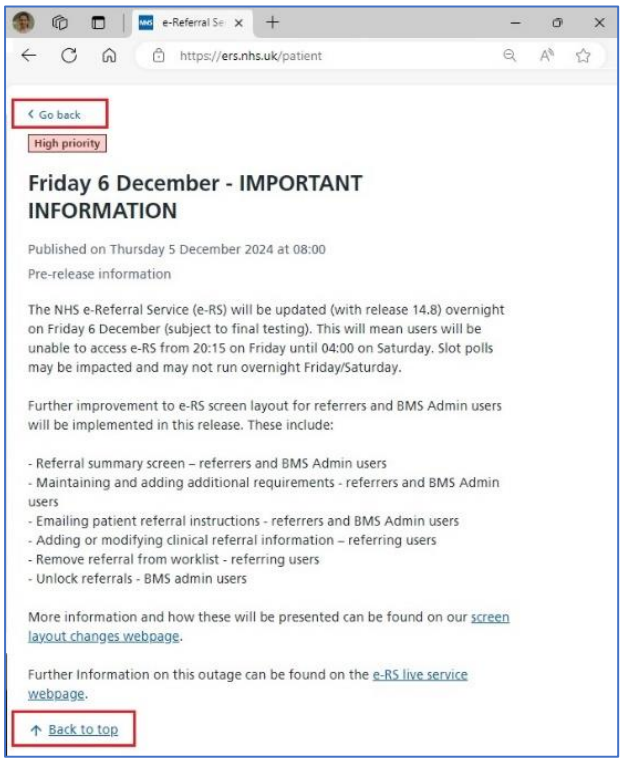
17. If the user has previously read the notification by using the yellow bar then they can click on the notifications in the top menu option .



18. The new notifications screen is shown below.

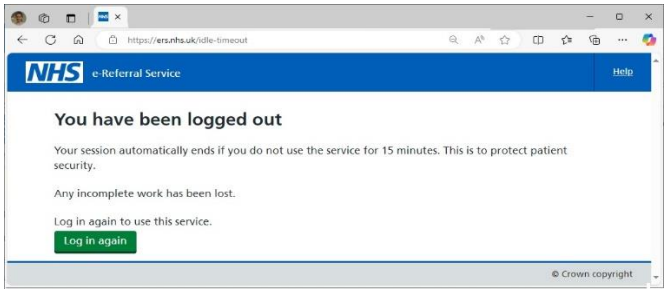


19. The new notifications screen is shown below. This is an example of the notifications screen,

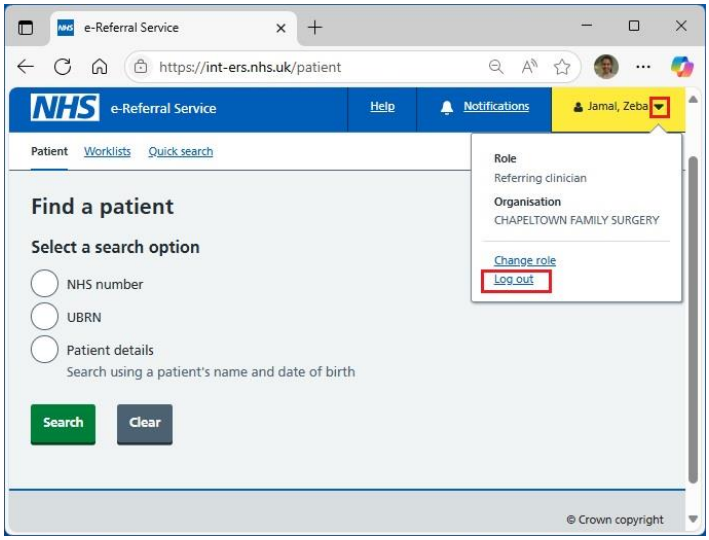


NHS e-RS Time out & Logging off

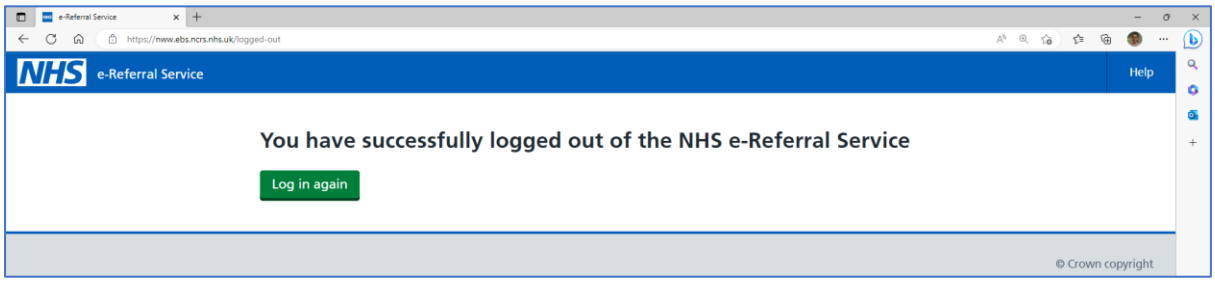
20. If there is no activity on the e-RS website for 15 minutes e-RS will time out



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 Logout.



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

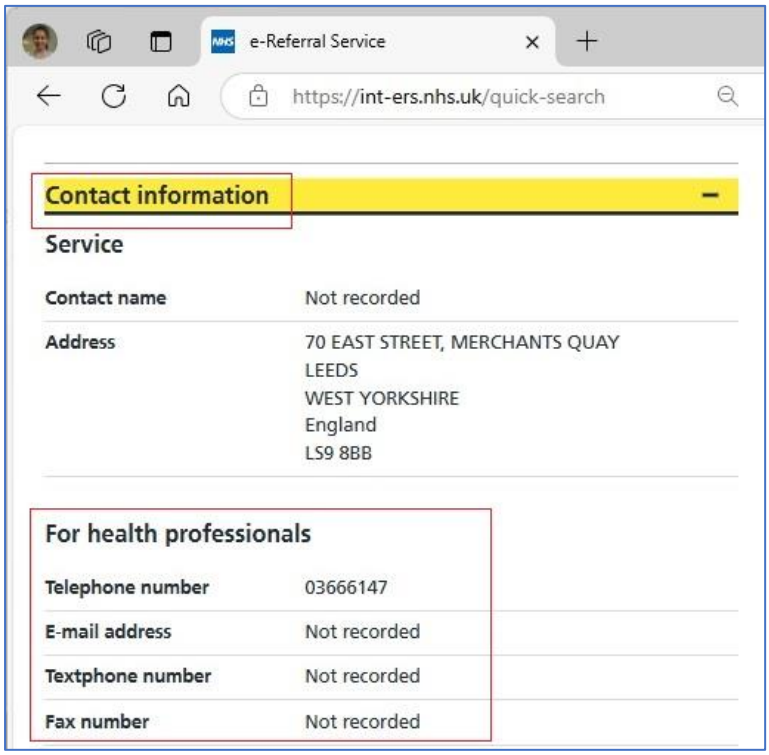
a. Chelsea & Westminster Hospital
b. West Middlesex University Hospital

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



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