

Review, Accept or Reject a Referral using the Referrals for Review Worklist

Referrals will appear on the Referrals for Review worklist once an appointment is booked and referral letter/ clinical information attached.

Note: All actions carried out for referrals (eg appointments) created in e-Referral Service should be managed/changed using the e-Referral Service. Where the service is directly bookable, any such changes will automatically be updated in e-Referral Service.

- ◆ With the **Worklists** tab open, use the filters available to view appropriate referrals.
- ◆ You can filter referrals by **Service, Clinician** and **Worklist**.

Reviewing referrals

- ◆ Select an appropriate **UBRN** to review. This opens the referral and shows a summary of the referral details.



- ◆ If a referrer sends referral information from their GP system, then the **Clinical Information** column will display this as a series of headings. It can be viewed by selecting each heading and/or printed by selecting the **Clinical Information Summary** option from the **Print** button dropdown.
- ◆ Otherwise referral letters will be located in and accessed via the **Attachments** section.

- ◆ Click on the blue hyperlink to open/review/print the referral letter.

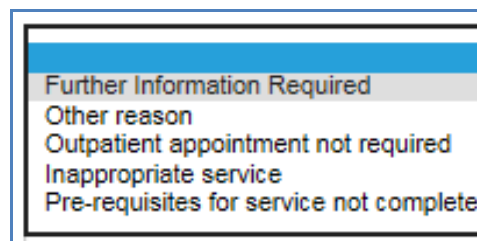
Accepting referrals

- ◆ Once you have reviewed the referral and decided it is clinically appropriate for the clinic, select **Accept, Review Next** in the Review Referral Summary screen.
- ◆ When you accept a referral, e-Referral Service will automatically show next UBRN on the worklist for review.

Once accepted, the referral will be removed from the worklist. To find a referral after it's been accepted you can use the Patient Enquiry with either the patient's NHS number or appropriate UBRN.

Rejecting referrals

- ◆ Once you have reviewed the referral and decided it is clinically *inappropriate* for the clinic, select **Reject** in the Review Referral Summary screen.
- ◆ Select a reason from the **Reason** dropdown list and enter further information in the **Comments** field. This information will be visible to the referrer and help them understand why the referral has been rejected.



- ◆ Select **Reject Referral, Review Next**.
- ◆ The appointment will automatically be cancelled in your PAS.

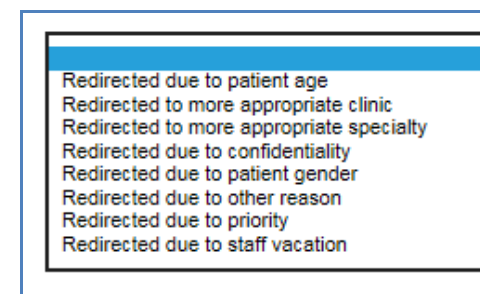
Once rejected, the referral will be removed from the worklist. You will be able to find it via a Patient Enquiry but only for 6 months after the rejection.

Redirecting a Referral Internally

Where appropriate, you can redirect a referral internally after reviewing the referral, by using the **Change Service** function. This action can be used as an alternative to

rejecting a referral. Whenever you redirect a referral the patient should be involved in the process.

- ◆ With the Review Referral screen open, select the **Change Service** button.
- ◆ The **Service Selection** screen allows you to make changes to priority, speciality/clinic type, etc.
- ◆ Either make any appropriate changes or leave the search options as they are.
- ◆ Select the **Search All** option.
- ◆ From the services shown select an appropriate (internal) service.
Note: If you see a service in the list highlighted with orange, it is the service the referral was originally referred to.
- ◆ Select **Appointment Search**.
- ◆ Select an appropriate appointment and click on **Book**.
- ◆ In the **Appointment Details** screen, you must enter a reason for rebooking the appointment and add any appropriate comments.



- ◆ Click **Submit**.
- ◆ Click **Close** on the next screen to complete the rebooking.

The referral will appear on the Referrals for Review worklist at the service/clinic the new appointment is now booked with.

Changing an Appointment

There are several reasons *and* options when changing an appointment. Whenever you change an appointment the patient should be involved in the process.

Option 1: Rebooking an Appointment

- ◆ In the Referrals for Review worklist, find the appropriate UBRN and open it.
- ◆ From the actions available select the **Change Appointment Date/Time** option.
- ◆ Select an appropriate appointment and click **Book**.
- ◆ In the **Appointment Details** screen, you must enter a reason for rebooking the appointment and add any appropriate comments.
- ◆ Click **Submit**.
- ◆ Click **Close** on the next screen to complete the rebooking.

This will automatically accept the referral. You can find the referral using the Patient Enquiry.

Option 2: Cancel Appointment, Rebook Later

This option will cancel the patient's appointment and make it available for booking at a later time.

- ◆ Open the referral in the **Referrals for Review** worklist, and select the **Change Appointment Date/Time** button.
- ◆ In the Appointment Search screen Select **Cancel Appointment, Rebook Later** option
- ◆ You will be prompted with a warning message, which you will need to say **Yes**, to proceed.
- ◆ Complete the **Appointment Request Details** screen.
- ◆ Select **Submit**
- ◆ Click **Close** on the next screen, which cancels the appointment.

The referral can be found on the **Appointments for Booking** worklist.

Option 3: Retain Appointment, Rebook Later

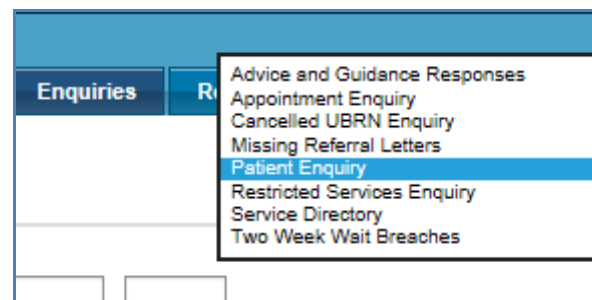
This option *keeps* the patient's appointment booked. This stops the appointment/slot being rebooked where the service provider does not want it to be and moves it to a new worklist to be actioned at a later time.

- ◆ In the Appointment Search screen select **Retain Appointment, Rebook Later** option.

- ◆ As above, the **Appointment Request** screen needs completing appropriately.
- ◆ Selecting **Submit** and then **Close**, will retain the patient's appointment.

The referral can be found on the **Appointments for Booking** worklist.

The Patient Enquiry



The Patient Enquiry will allow you to view and action a patient's referral. All of the actions in this Quick Reference Guide can also be carried out via the Patient Enquiry.

To open a referral via the Patient enquiry:

- ◆ Select the **Enquiries** tab.
- ◆ Click on the **Enquiry Type** dropdown.
- ◆ Select **Patient Enquiry**.
- ◆ Input either the patient's NHS number or an appropriate UBRN to search for the referral.
- ◆ Click on the **Search** button
- ◆ Select the correct UBRN and view the available actions from the **- Actions -** dropdown list.
- ◆ Any actions displayed are dependant on the referral's previous activity.
- ◆ The **View History** option will allow you to see a complete audit trail of each referral associated with your service(s).

NHS e-Referral Service

QUICK GUIDE

For Service Provider Clinicians of Directly Bookable Services (DBS)

In This Guide

- ❖ Review, Accept or Reject a Referral
- ❖ Redirecting a Referral Internally
- ❖ Changing an Appointment
- ❖ The Patient Enquiry

For further information
www.hscic.gov.uk/referrals

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