North West London Collaboration of
Clinical Commissioning Groups

NHS e-Referrals
Frequently Asked Questions
North West London CCGs

Contents

Introduction 4

1. Getting started 5

What is e-RS? 5

How can I access the e-RS system? 5

Using SystmOne: 5

Using EMIS: 5

Other: 5

What is a UBRN? 5

Who are the providers? 5

What is the DOS? 5

What is an ASI? 6

What is Advice and Guidance? 6

What do I do if I can't find a clinic on e-RS? 6

What do I do if there are no appointments on e-RS? 6

How do I amend an NHS e-Referral letter after it has already been sent? 6

What if I have an urgent referral but the only appointment available is a few months away? 7

How do I refer patients without an NHS Number? 7

I want to request a specific consultant – what do I do? 7

Are there any outstanding actions for my patient's referral? 7

Why does a referral remain in the e-RS work list even after completing the requested action? 7

The provider has left a comment, what does this mean? 8

My patient wants to be seen at their local hospital but e-RS only shows services further away. What do I do? 8

I made a 'defer to provider' referral but the patient still doesn't have an appointment. Who should my patient contact? 8

My patient is having trouble confirming their appointment at their chosen hospital. Can they contact the hospital directly? 8

A new member of staff made an e-mail referral by mistake. What should I do? 8

I've referred my patient via e-RS but I have been asked to send another referral (or a copy of it) via email/paper just in case? 8

2. Hints and Tips 9

2WW referrals 9

Children and adolescent services For any Children's and adolescent services, please remember to choose Speciality > Children's and Adolescent Services and then pick the appropriate Clinic Type as shown: 9

3. How to… 10

Attach a referral letter Please check "Outstanding Referral Letters", and other worklists daily. Any outstanding letters will be listed on there as per below: 10

Check an appointment status after picking 'Defer to provider' 11

Process an incomplete referral 12

4. Support 13

CCG 'GateKeepers' 13

Trust 'GateKeepers' 14

Introduction

This document is intended to assist practice staff, where the correct course of action regarding a referral is not necessarily clear.

It is encouraged that all users use the **NHS e-RS** page on **NWLCCG website** as well as the **YouTube videos** to find solutions they require. Users can also log any calls directly with the **Service Desk team on 0203 3504050 or email nwlccg.servicedesk@nhs.net** to ask any questions regarding e-RS that may not have been covered below.

This is a working document and will be updated when new situations arise or further clarification is required.

Please note: Making a referral **is always the responsibility of the referring clinician**, who with the patient, should decide on the most clinically appropriate options for the referral and onward pathway.

1. Getting started

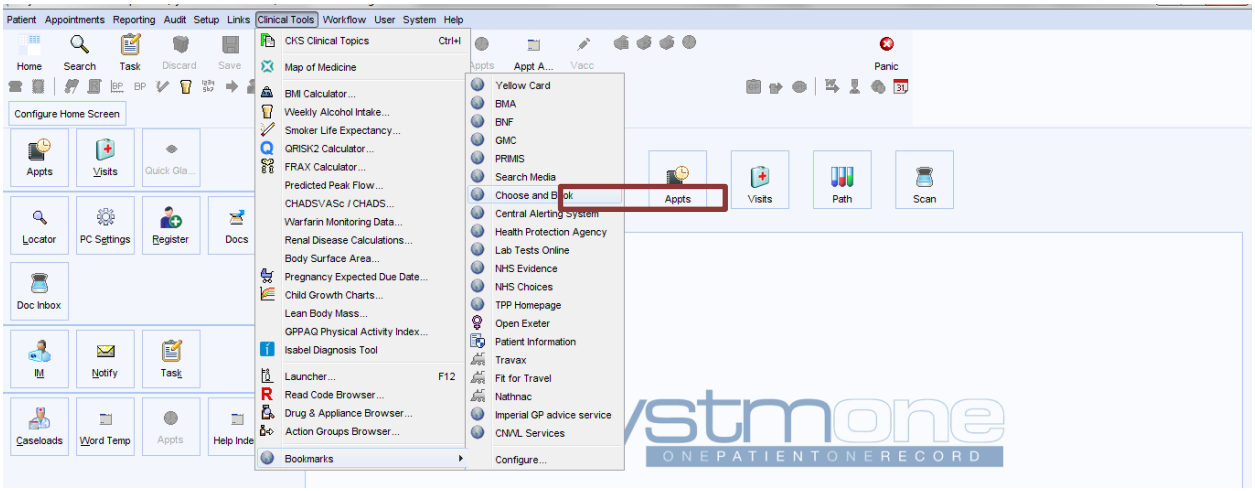
What is e-RS?

e-RS (previously known as Choose and Book) is an electronic referral management system offering patients a choice of place, date and time for their first hospital/clinic appointment.

How can I access the e-RS system?

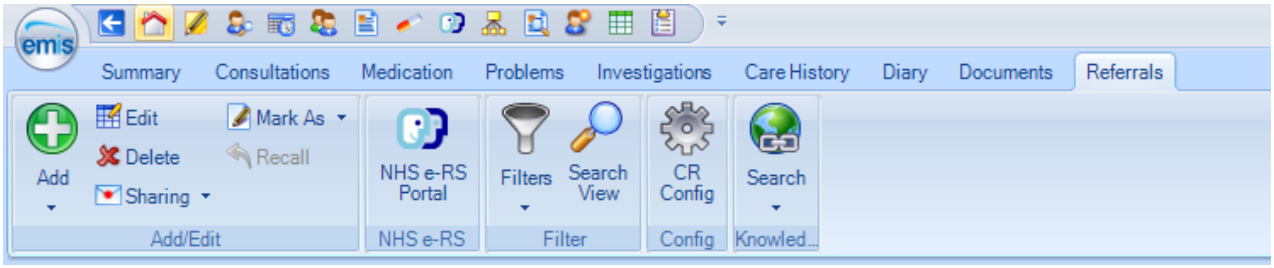
Using SystmOne:

e-RS can be accessed directly through SystmOne. Click on the referral node and then click on referral wizard and pick the relevant Address book entry with e-RS in the title. An e-RS short cut can also be added to the bookmarks bar in SystmOne.



Using EMIS:

e-RS can be accessed directly through EMIS. The icon is always visible in the Care Record > Referrals. An e-RS short cut can be configured to appear in the toolbar in EMIS.



Other:

e-RS can also be accessed from this web address: https://nww.ebs.ncrs.nhs.uk/

What is a UBRN?

A **U**nique **B**ooking **R**eference **N**umber (UBRN) allows patients to book/change their appointment. Each referral must have a UBRN.

Who are the providers?

Secondary, primary and community care services.

What is the DOS?

The Directory of Service (DOS) holds information which describes the services the provider offers. A referrer can search the DOS for services to which they can refer a patient.

What is an ASI?

This is an Appointment Slot Issue (ASI), which is when there are no slots available for booking an appointment at the time of the appointment search.

What is Advice and Guidance?

Advice and Guidance (A&G) is a communication between two clinicians; the "requesting" clinician and the provider of a service (the "responding" clinician). Both clinicians are able to have a 2-way dialogue regarding a particular referral.

Frequently asked questions

What do I do if I can't find a clinic on e-RS?

Please contact the relevant trust and your CCG e-RS lead, see contacts at the bottom of this document. These are also included in the Standard Operating Procedure.

What do I do if there are no appointments on e-RS?

Providers are responsible for making sure they have a sufficient number of appointment slots available via e-RS.

Where a referral is made through e-RS and no appointment slots are available for the chosen service(s), the referral can be made to an alternative provider or the 'defer to the provider' function can be used. Once this has been done the provider has a responsibility to contact the patient directly to arrange an appointment.

Let the patient know that the hospital will contact them to arrange an appointment. If they are not contacted within 2 working days for a 2WW referral or 5 for an urgent appointment (or earlier if necessary within the clinical judgement of the GP) and 10 for a routine appointment, they should ring the number listed on the hand-out and inform the practice.

The practice should follow a patient's referral through their e-RS 'Worklist'.

How do I amend an NHS e-Referral letter after it has already been sent?

You can amend the final referral letter through the NHS e-Referral System after it has been sent and add further attachments, if required. Practices should not send a new referral or fax a referral through.

Process to follow to amend an NHS e-Referral:

- Retrieve the patient record.
- Select the 'Referrals' node from the Clinical tree.
- Select Referrals Out tab

Right-click on the relevant referral; and select **Update on Choose and Book**.

- Click Continue Writing. The Choose and Book Referral window is displayed.
- Make the necessary amendments to the referral.
- Use the **Attach** buttons at the foot of the window to add further attachments.
- Click on **Send Final Version**.
- To view a previous version of the electronic referral that has been sent to Spine, right-click on the referral and selects View Previous Versions.

What if I have an urgent referral but the only appointment available is a few months away?

Make the referral and book the earliest available appointment. Write on the referral letter to the hospital that it is an urgent referral and the hospital should give the patient an earlier appointment if possible. Contact your CCG lead to communicate with the Acute Trust to try and find an alternative way of making the referral. Track through your worklist on e-RS.

How do I refer patients without an NHS Number?

If the patient's NHS Number cannot be determined then the referral will have to be made on email/paper. The receiving Trust will accept the referral and process it.

I want to request a specific consultant – what do I do?

Complete the referral via e-RS and request the specific consultant on the referral letter attached.

Are there any outstanding actions for my patient's referral?

If there are any outstanding actions for the referral, they will be listed on one of the Worklists which should be checked regularly. Referrals on the "awaiting booking/acceptance" must be MONITORED but not necessarily ACTIONED in all cases. A brief guide to worklists can be found here:

A brief Summary on maintaining e-RS worl

Why does a referral remain in the e-RS work list even after completing the requested action?

Some referrals can be moved like the ones listed below:

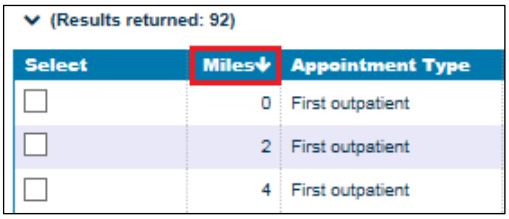
- "Referrer action required" worklist - Cancelled UBRN – check the reason for cancellation, enter any comments in the patient record and remove the UBRN
- "Referrer action required" worklist - Assessment Results – review and enter any comments on patient record iand remove the UBRN
- "Referrer action required" worklist – Rejected – review the comment and re-refer the patient into the appropriate service

The provider has left a comment, what does this mean?

Please read the comment by clicking on the UBRN. Most of the comments should be self-explanatory, if not contact the provider for clarification

My patient wants to be seen at their local hospital but e-RS only shows services further away. What do I do?

a. Make sure you selected correct Speciality and Clinic Type.
b. Make sure that the filter on "Miles" is visible to find the closest provider to the patient's home address.



c. Local Service Provider's Clinic might not be on e-RS. Please contact CCG Gatekeeper.

I made a 'defer to provider' referral but the patient still doesn't have an appointment. Who should my patient contact?

The patient should contact the number provided on the hand-out/printouts they were given. If it's outside the response times (2 days for 2WW, 5 days for an urgent referral (or earlier if clinically appropriate) and 10 days for routine) the patient should also contact the practice. As above, the practice should inform the CCG gatekeeper contact and follow up through their worklist.

My patient is having trouble confirming their appointment at their chosen hospital. Can they contact the hospital directly?

Yes, the patient can contact the hospital directly; the details are provided on the hand-out given to the patient at the time the referral is made.

A new member of staff made an e-mail referral by mistake. What should I do?

In this instance, contact the provider and seek advice. The provider might ask you to re-refer the patient via e-RS.

I've referred my patient via e-RS but I have been asked to send another referral (or a copy of it) via email/paper just in case?

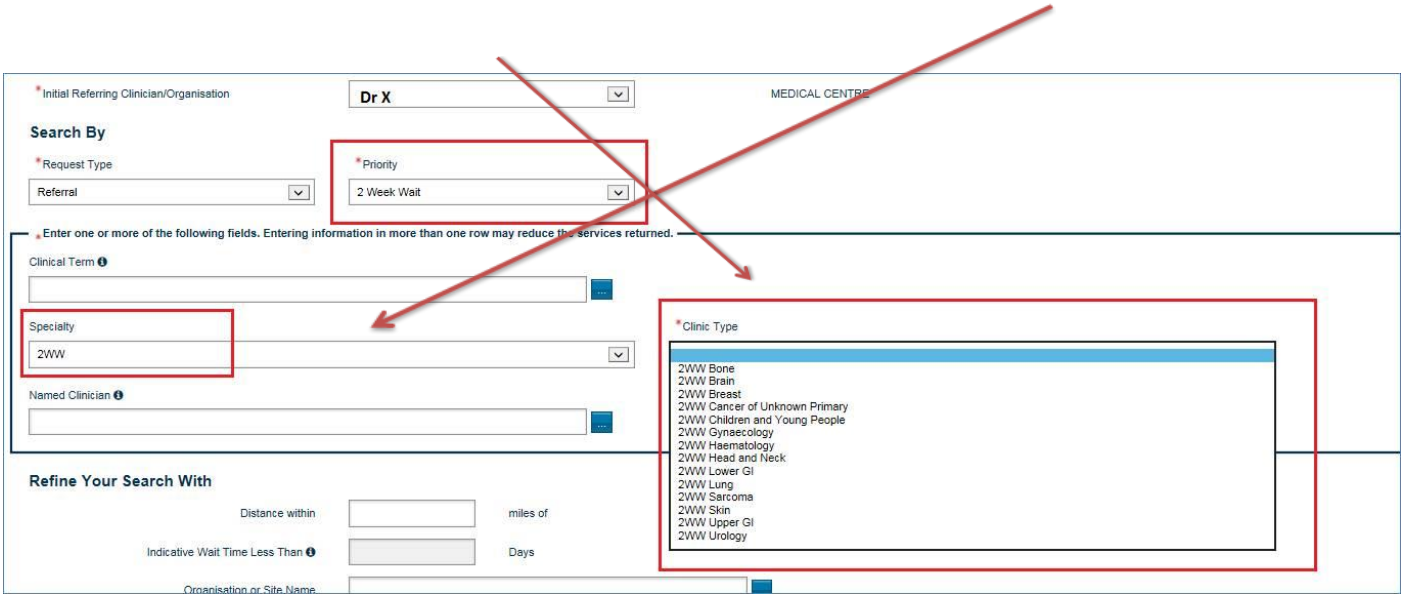
Contact the hospital's e-RS team with the name of the clinic and outline the issue, a list of hospital e-RS contact details are below.

2. Hints and Tips

2WW referrals

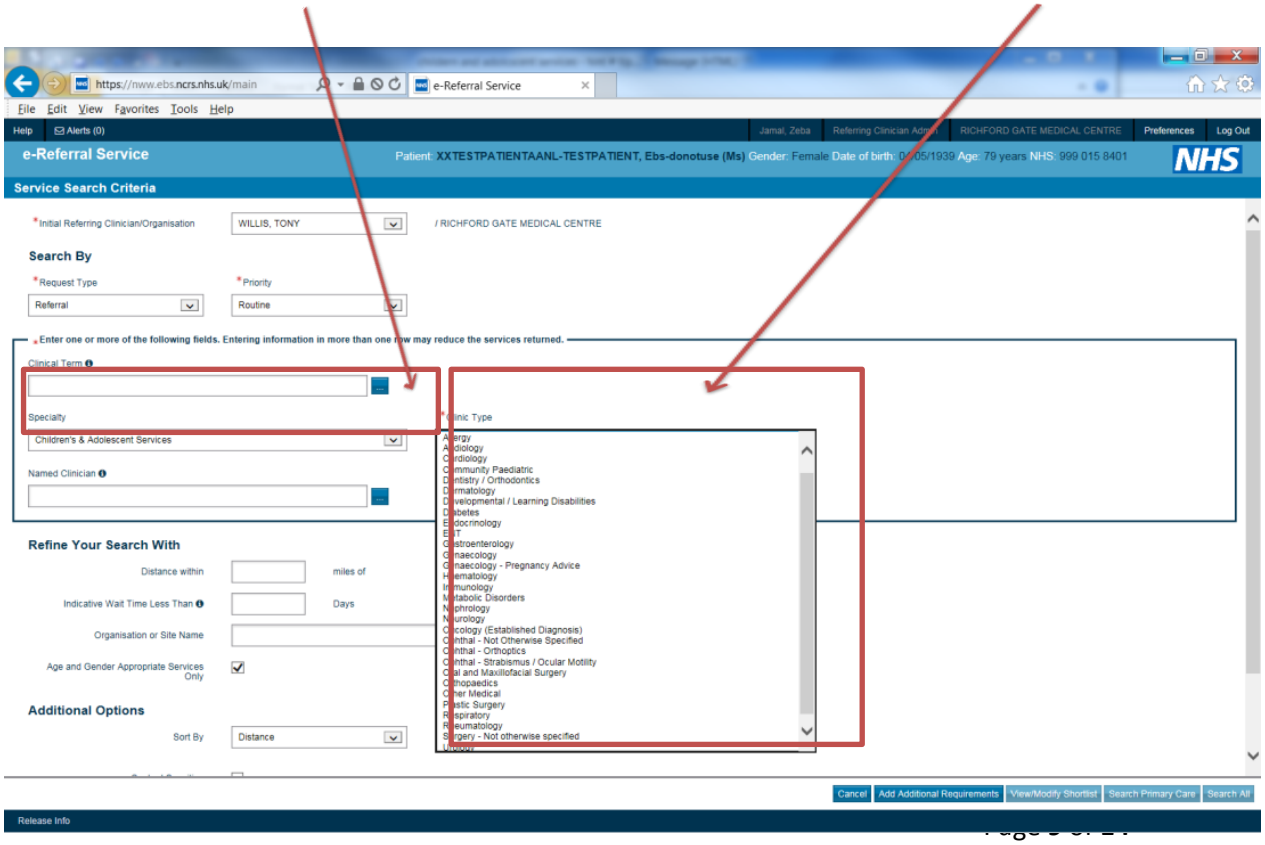
For any 2WW rule, please remember on the e-RS website, under **speciality** choose **2WW** and then pick the appropriate **Clinic Type** as shown:

If you still can't find the clinic then e-mail the hospital's e-RS team, contacts below.



Children and adolescent services

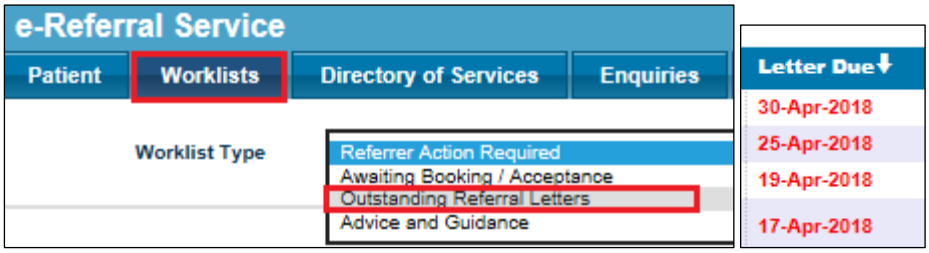
For any Children's and adolescent services, please remember to choose **Speciality > Children's and Adolescent Services** and then pick the appropriate **Clinic Type** as shown:



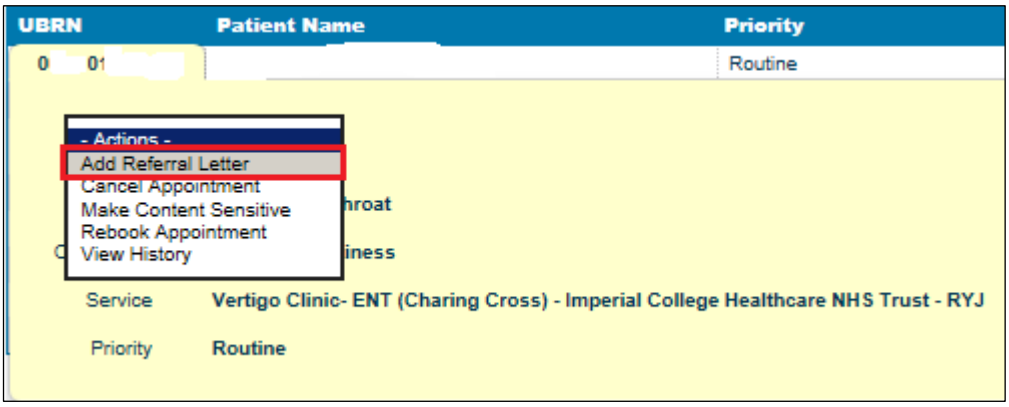
3. How to…

Attach a referral letter

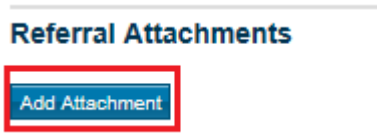
Please check “Outstanding Referral Letters”, and other worklists daily. Any outstanding letters will be listed on there as per below:



If the referral has already been sent as a final version, the letter can be attached on e-RS as per below:

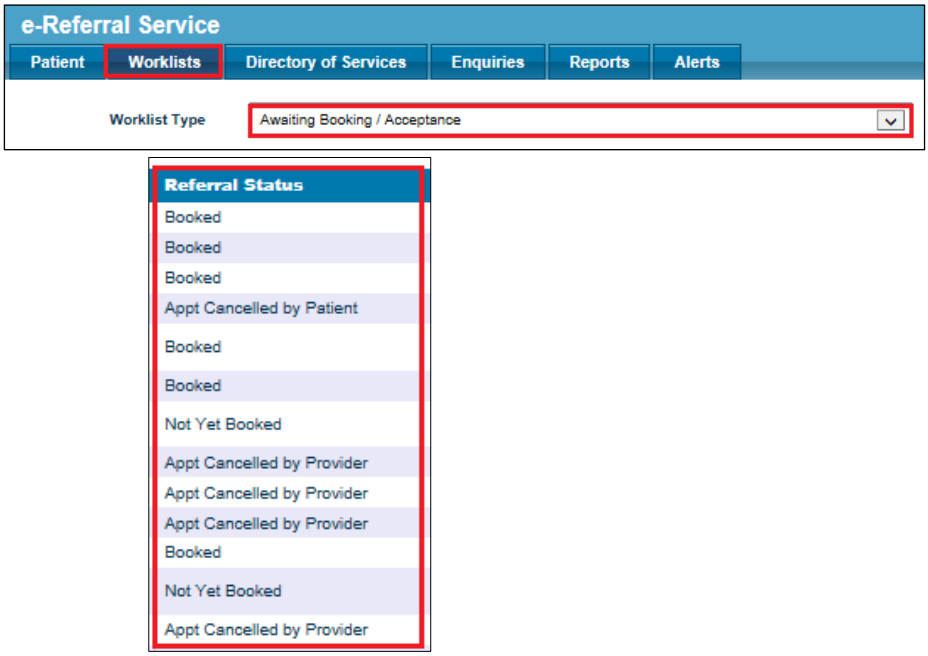


Attach the referral letter by clicking ‘add attachment’

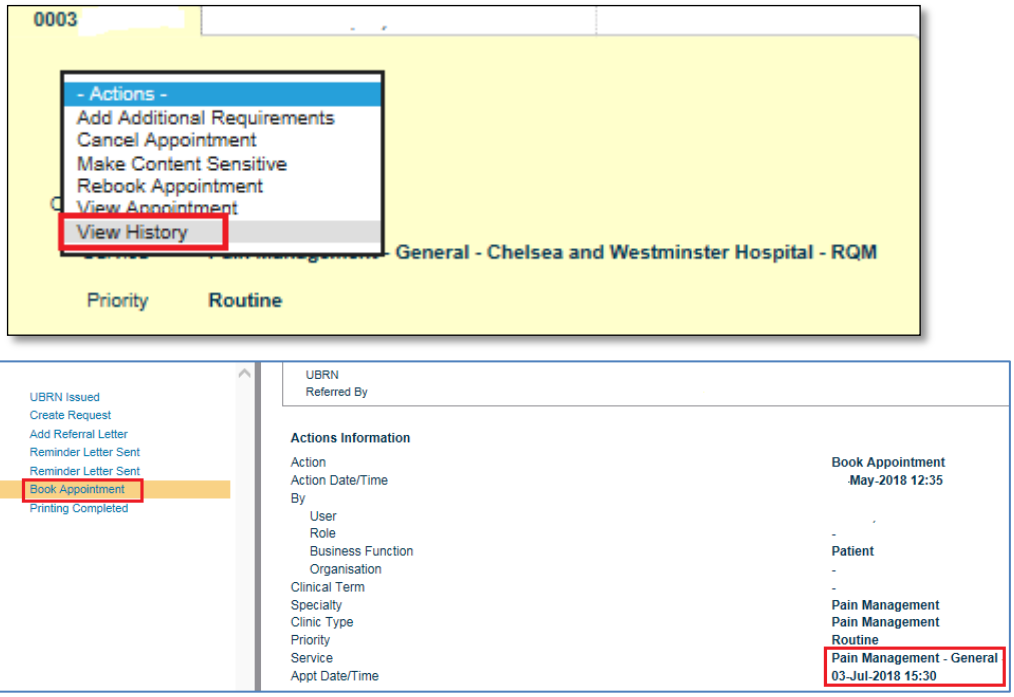


Check an appointment status after picking 'Defer to provider'

Check the "Awaiting Booking/Acceptance" worklist and see what the referral status is:



Check on the UBRN history.



The provider should have updated the system once the patient has been given an appointment. For any query relating to the booking, contact the provider or the patient.

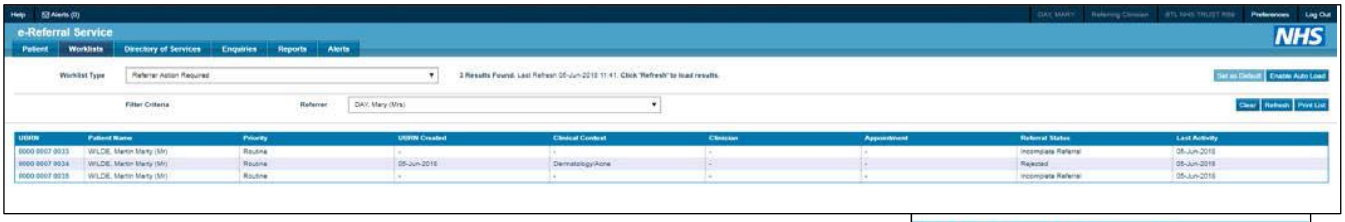
Process an incomplete referral

What is the criteria for a UBRN to be in an incomplete state?

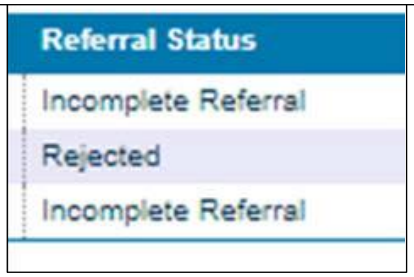
- A referral has been created from a GP integrated system and a UBRN requested from the NHS e-Referral Service (e-RS)
- The referral has had clinical information attached from within the GP integrated system
- No services have been shortlisted for the referral, i.e. the referral has stopped at this point

Where will an incomplete UBRN be visible?

Within e-RS, incomplete UBRNs will be displayed:



On the Referrer Action Required worklist with a Referral Status of 'Incomplete Referral'. Please note, incomplete UBRNs created prior to 19 June 2018 will NOT be populated on the Referrer Action Required worklist, only incomplete UBRNs created after this date will be displayed



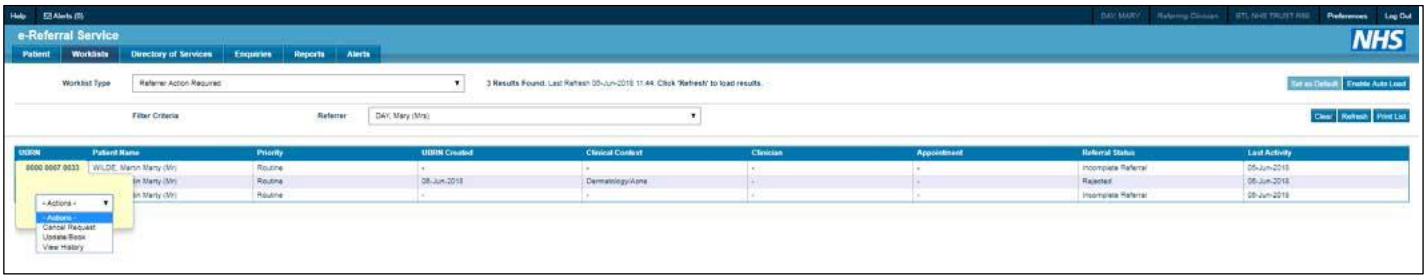
Category	Referral Type
Future	Referral
Incomplete Referral	Draft
Unbooked	Referral
Incomplete Referral	Draft

On the Patient Activity List (PAL): all incomplete UBRNs relating to the selected patient will be displayed from when e-RS went live (June 2015) with a Category of 'Incomplete Referral' and Referral Type of 'Draft'

How can the incomplete UBRN be processed?

From both the Referrer Action Required worklist and PAL a user will have the options to:

- cancel the request
- update/book – shortlist services
- view history



What will happen once the incomplete UBRN has been processed?

- If the incomplete UBRN is converted into an appointment/advice request, the UBRN will be removed from the Referrer Action Required worklist

- If the incomplete UBRN is cancelled, the UBRN will be removed from the Referrer Action Required worklist and will be displayed on the PAL, with the option to view the referral history.

Future enhancements will improve the pre-submission screens so that referrers will be more aware whether they have completed the referral process or not.

4. Support

*If you are emailing with e-RS queries/issues please remember **not** to include any patient identifiable information. Send queries stating UBRN and a brief description of the issue.*

Key Contacts:

IT Issues

In the event of a practice IT system "going down" so they cannot use e-RS then the GP business continuity plan comes into play. The Practice should contact the NWL IT service desk:

a) **Tel:** 0203 350 4050
b) **Email:** nwlccg.servicedesk@nhs.net to inform them they will not be able to make referrals via e-RS.

CCG 'GateKeepers'

Your CCG contact is the first port of call for issues regarding eRS.

Organisation	Name	Email Address
Brent CCG	Brent GP Locality	BrentGPLocality@nhs.net
Central London CCG	Monika Truszczynska Rebecca McCaw	m.truszczynska@nhs.net rebecca.mccaw@nhs.net
Ealing CCG	Network Relationship Managers Team	Ealccg.networkmanagers@nhs.net
Hammersmith and Fulham CCG	Coral McNeilly Nathaniel Whiting	nwlccgs.hfprimarycare@nhs.net coral.mcneilly@nhs.net nathaniel.whiting@nhs.net
Harrow CCG	Eva Amalathas	e.amalathas@nhs.net

		nomaan.omar@nhs.net
Hillingdon CCG	Kirstie Neale	thh-tr.bookingcentre@nhs.net kirstie.neale@nhs.net
Hounslow CCG	Vince Makin Sabrina Tobias Chanel Herdman	vince.makin@nhs.net sabrina.tobias@nhs.net chanel.herdman@nhs.net
West London CCG	West London Primary Care Team	wlccg.e-rs@nhs.net

Trust 'GateKeepers'

Your CCG contact is the first port of call for issues regarding eRS. If contacting the trust contact below please also notifying the CCG lead by copying them into any correspondence.

Organisation	Name	Email Address
Imperial	Ruby Sultana Damien Bruty	ICHC-tr.eRS@nhs.net
Chel West	Nicola Burgess	ers.pso@chelwest.nhs.uk
LNWH	Vinod Chauhan	lnwh-tr.ers-enquires@nhs.net vinod.chauhan@nhs.net
Hillingdon	Vijaya Kololgi GP Hotline	vijayalakshmi.kololgi@nhs.net thh-tr.bookingcentre@nhs.net
Brompton	Tina Kay	T.Kay@RBHT.nhs.uk