

HOW TO SEND AN MSK REFERRAL TO THE CLINICAL REFERRAL & ASSESSMENT SERVICE

You will need

- The NHS number or demographic details of the patient you are raising the referral for
- Access to the referral letter either from the clinical notes system or a saved copy of it on your local server

1. Log into Choose & Book and click on the 'Patient' tab – enter the NHS number of the patient or search demographics

The screenshot shows the 'chooseandbook' interface. At the top, there are navigation tabs: Patient, Worklists, Directory of Services, Enquiries, and Reports. Below these is a search bar with the text 'Search By: NHS Number UBRN Demographics'. The NHS number '999 008 7377' is entered and highlighted with a red circle. Below the search bar, patient details are displayed, including Name (Mouse, Ms Minnie), NHS Number (999 008 7377), Date of Birth (01/06/1970), Age (42 years), Gender (Female), Telephone, Secondary Home (01273123456), Address (C/O Npft Test Data Mgr, Princes Exchange, Princes Square, Leeds, West Yorkshire, BN1 6AG), and Email (Primary Home: bics.booking@nhs.net). There are buttons for 'Refer/Advice' and 'Update Person'. Below the patient details is a 'Patient Activity List' table with columns for UBRN, Requested Date/Time, Appointment Date/Time, Referred By, Category, Referral Type, Referral Sent, and Clinical Context. The table shows three rows of activity, with the most recent one being a referral sent on 20/02/2013.

2. Click on Refer/Advice to create a new referral for this patient.

This screenshot is similar to the previous one, showing the patient details for NHS number 999 008 7377. The 'Refer/Advice' button is highlighted with a red circle, indicating the next step in the process. The 'Patient Activity List' table is also visible, showing the same three rows of activity as in the previous screenshot.

- Complete the Referring Clinician, Request Type, Priority, Speciality, Clinic Type
Check the pt's postcode is entered and then select 'Search Primary Care' (bottom right)

NB: choosing the correct priority (as per the referrer's instructions/letter) is important because Sussex MSK Partnership Clinical Support Team prioritises Urgent referrals over Routine referrals for triage and booking.

Service Search Criteria

* Initial Referring Clinician/Organisation: **Dantree, Rosalind** CHAPEL STREET SURGERY

Search By:

* Request Type: **Appointment** * Priority: **Routine**

* Enter one or more of the following fields. Entering information in more than one row may reduce the services returned.

Clinical Term:

Speciality: **Orthopaedics** Clinic Type: **Knee** [Access Service Selection](#)

Refine Your Search With:

Distances Within Miles of Postcode BN1 GAG

Indicative Wait Time Less Than Days

Organisation or Site Name:

Age and Gender Appropriate Services Only

Additional Options:

Sort By: Content Sensitive [Request Additional Requirements](#)

Referring Information:

Commissioning Organisation: NHS HIGH WEALD LEWES HAVENS CCG

[Cancel](#) [View/Modify Shortlist](#) **[Search Primary Care](#)**

- Select Sussex MSK Referral Service, then click 'Request' (bottom right)

choose and book Patient: **House-TestPatient, Ms Minnie** Gender: **Female** Date of Birth: **01/06/1970** Age: **44 years** NHS: **999 008 7377**

Service Selection

Group By: **None**

Select	Miles	Service Name	Referrer Alert	Directly Bookable	Location	Patient Information	Appointment Type	Indicative Wait Time	Organisation Type
<input checked="" type="checkbox"/>	0	Sussex MSK Partnership (Sax) - Orthopaedics		N	Telephone Assessment	NHS Choices	Telephone Assessment	30 Days	Independent

Compare Services

[Cancel](#) [Search Criteria](#) [Appointment Search](#) **[Request](#)**

5. Review before proceeding – if happy select 'Submit'(bottom right)

Appointment Request Summary - 0002-3847-2358

Appointment Request Details

The patient's Consent to Call Back is defined as Yes. If the patient wants to change the Consent to Call Back, enter the change in Update Person.

UBRN Created Date: Tuesday 12/03/2013
 UBRN: 0002-3847-2358
 Speciality: Orthopaedics
 Clinic Type: Not Otherwise Specified
 Clinical Term: -
 Service(s):

Location	Referrer Alert	Service Name	Organisation Type	Indicative Wait Time
Telephone Assessment	0	Sussex MSK Partnership (East) - Orthopaedics NWX01	Independent	31 Days

Priority: Routine
 Content Sensitive: No

[Print](#) [Update Person](#) [Compare Services](#) [Add Additional Requirements](#) [Add Referral Letter](#) [Close](#)

6. Now add the referral letter click 'Add Referral Letter' (bottom right)

Appointment Request Summary - 0002-3847-2358

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 Clinical Term: -
 Service(s):

Location	Referrer Alert	Service Name	Organisation Type	Indicative Wait Time
Telephone Assessment	0	Sussex MSK Partnership (East) - Orthopaedics NWX01	Independent	31 Days

Priority: Routine
 Content Sensitive: No

[Print](#) [Update Person](#) [Compare Services](#) [Add Additional Requirements](#) [Add Referral Letter](#) [Close](#)

7. The below screen will appear – click on ‘Add Attachment’ (left) and then ‘Submit’ (bottom right)

Initial Information

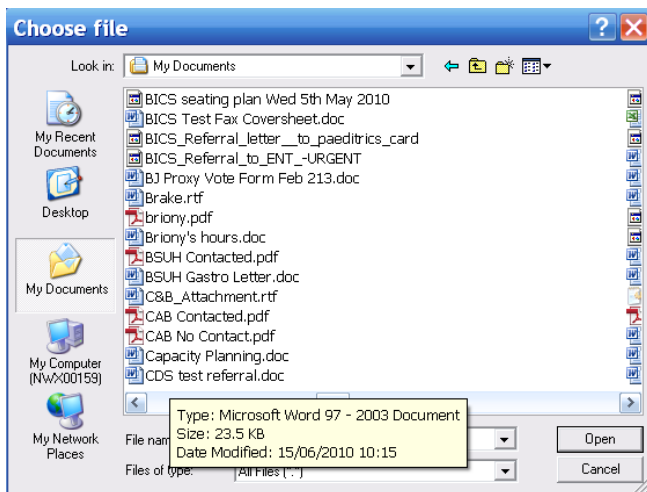
Referred By:
 Name: Riley, Matthew
 Organisation Name: WISH PARK SURGERY
 Organisation Address: 124 NEW CHURCH ROAD
 HOVE
 EAST SUSSEX
 BN3 4JB
 Organisation Phone: 01273729194

Priority: Routine

Referred Attachments

File Name	File Description	Remove
None Found		

8. Search your local drive for a saved copy of the letter, highlight and click ‘Open’ to attach it



Finally, give the referral letter/form a File Description e.g. ‘Minnie Mouse ENT Referral’

Initial Information

Referred By:
 Name: Riley, Matthew
 Organisation Name: WISH PARK SURGERY
 Organisation Address: 124 NEW CHURCH ROAD
 HOVE
 EAST SUSSEX
 BN3 4JB
 Organisation Phone: 01273729194

Priority: Routine

Referred Attachments

File Name	File Description	Remove
CDS test referral.doc	<input type="text" value="Click here to add File Description"/>	<input type="button" value="X"/>

9. Once you've named the file click 'Submit' (bottom right)

10. Click on the letter to open and read/check it is the correct one.

Clinical Information

UBRN Information

Appointment Date/Time: -
 Priority: Routine
 Clinical Context: Orthopaedics
 Location: -
 Clinical Term: -

UBRN Created Date: 12/03/2013 11:01am
 Referral Letter Created: 12/03/2013 11:22am
 Letter Last Modified: 12/03/2013 11:22am
 Named Clinician: -
 Allocated Clinician: -
 Referred By: Riley, Matthew
 Referring Organisation: WISH PARK SURGERY
 Registered Practice: XXX DO NOT USE XXX EBS GP PRACTICE 01

Patient Information

Patient Name: Mouse, Ms Minnie
 Gender: Female
 Date of Birth: 01/06/1970
 Age: 42 years
 NHS: 999 008 7377

Telephone: Secondary Home: 01273123456
 Textphone: -
 Email: Primary Home: bics.booking@nhs.net
 Fax: -
 View All

Address: C/O Npft Test Data Mgr
 Princes Exchange
 Princes Square
 Leeds
 West Yorkshire
 BN1 6AG

Attachments

File Name	File Description	Added By	Date/Time Added
CDS test referral.doc	Minnie Mouse Derm Referral	Jefferies, Briony (Referring Clinician Admin)	12/03/2013 11:22am

Print Close

11. Close the screen

Appointment Request Details

The patient's Consent to Call Back is defined as Yes. If the patient wants to change the Consent to Call Back, enter the change in Update Person.

UBRN Created Date: Tuesday 12/03/2013
 UBRN: 0002-3847-2358
 Speciality: Orthopaedics
 Clinic Type: Not Otherwise Specified
 Clinical Term: -

Service(s)	Location	Referrer Alert	Service Name	Organisation Type	Indicative Wait Time
Telephone Assessment			Sussex MSK Partnership Service - Orthopaedics NWX01	Independent	31 Days

Priority: Routine
 Content Sensitive: No

Print Update Person Compare Services Add Additional Requirements Modify Referral Letter Close

12. This automated box will pop up – always choose 'Continue'.

The screenshot shows a web interface for 'Appointment Request Details'. A 'Print Warning' dialog box is displayed in the center, with a red border and a red header. The dialog text reads: 'You have not printed the summary page. Do you wish to continue without printing the summary page? If you wish to print the summary page please click the "Print" button and select a print option from the reveal.' At the bottom of the dialog, there are two buttons: 'Continue' and 'Print'. The 'Continue' button is circled in red. The background interface shows various appointment details such as 'LBRN Created Date: Tuesday 12/03/2013', 'Specialty: Dermatology', and a table of services.

Service(s)	Location	Referrer Alert	Service Name	Organisation Type	Indicative Wait Time
Telephone Assessment		1	Brig	Independent	31 Days

CANCELLING A REFERRAL REQUEST

NB: if you do not cancel these requests off the patient will receive a letter from Milton Keynes 10 days after the UBRN was created

1. Find the UBRN (either using the Worklists tab or Patient tab)
2. Go to the Patient tab - Enter the UBRN

Help | ALERTS 12/04/2013 12:06 | Jefferies, Briony Kate | Refer

choose and book

Patient | Worklists | Directory of Services | Enquiries | Reports

Search By: NHS Number UBRN Demographics

UBRN: 0002 - 3941 - 5897

Name: Mouse, Ms Minnie
 NHS Number: 999 008 7377
 Date of Birth: 01/06/1970
 Age: 42 years
 Gender: Female

Telephone: Secondary Home: 01273123456
 Textphone: -
 Email: Primary Home: bics.booking@nhs.net
 Fax: -
 View All

Address: C/O Npft Test Data Mgr
 Princes Exchange
 Princes Square
 Leeds
 West Yorkshire
 BN1 6AG

Patient Activity List - Displaying patient activity within the last 18 months only.

Show All Non-Archived Referrals

Last Refresh 16/04/2013 08:40am Print

UBRN	Requested Date/Time	Appointment Date/Time	Referred By	Category	Referral Type	Referral Sent	Clinical Context
0002-3941-5897	15/04/2013 10:14	-	Riley, Matthew	Unbooked	Referral	-	Surgery - Vascular / Not Otherwise Specified
0002-3941-5899	15/04/2013 10:12	-	Riley, Matthew	Unbooked	Referral	-	GI and Liver (Medicine and Surgery) / Lower GI (medical)
0002-3941-5141	15/04/2013 09:43	-	Riley, Matthew	Unbooked	Referral	-	Children's & Adolescent Services / Allergy
0002-3941-5091	15/04/2013 09:41	-	Riley, Matthew	Unbooked	Referral	-	Orthopaedics / Shoulder and Elbow
0002-3941-5061	15/04/2013 09:40	-	Riley, Matthew	Unbooked	Referral	-	Gynaecology / Menstrual Disorders
0002-3941-5030	15/04/2013 09:38	-	Riley, Matthew	Unbooked	Referral	-	Dermatology / Acne

3. Actions – Cancel Request

choose and book

Patient | Worklists | Directory of Services | Enquiries | Reports

Search By: NHS Number UBRN Demographics

UBRN: 0002 - 3941 - 5897

Name: Mouse, Ms Minnie
 NHS Number: 999 008 7377
 Date of Birth: 01/06/1970
 Age: 42 years
 Gender: Female

Telephone: Secondary Home: 01273123456
 Textphone: -
 Email: Primary Home: bics.booking@nhs.net
 Fax: -
 View All

Address: C/O Npft Test Data Mgr
 Princes Exchange
 Princes Square
 Leeds
 West Yorkshire
 BN1 6AG

Patient Activity List - Displaying patient activity within the last 18 months only.

Show All Non-Archived Referrals

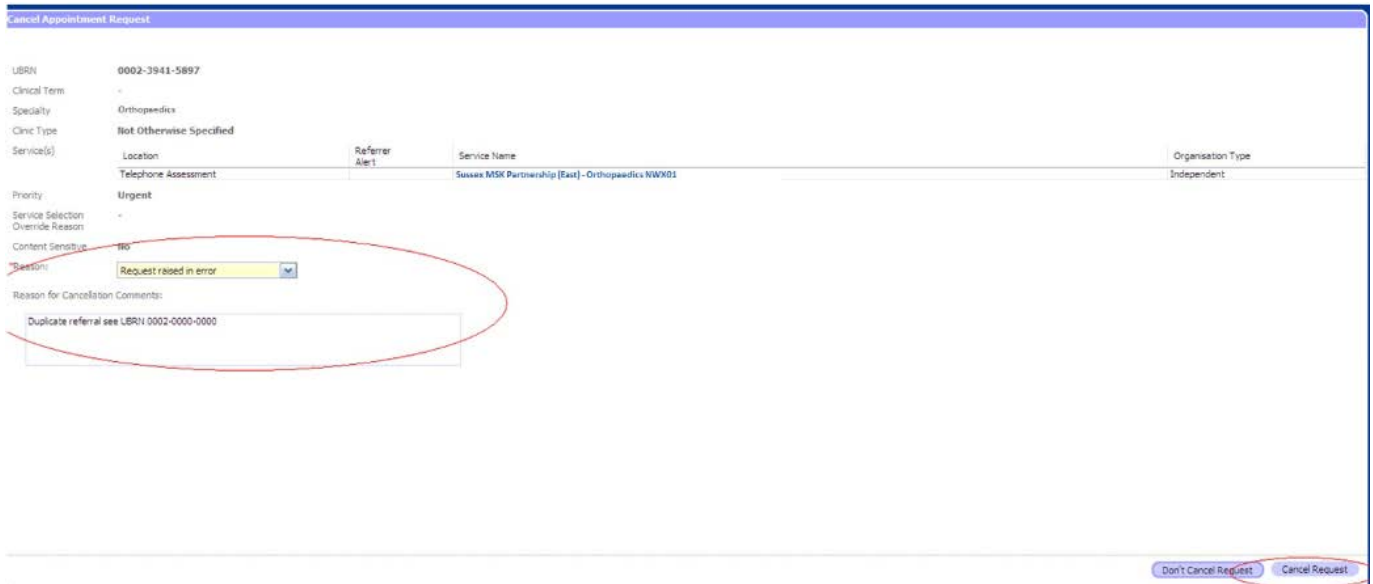
Last Refresh 16/04/2013 08:40am Print

UBRN	Requested Date/Time	Appointment Date/Time	Referred By	Category	Referral Type	Referral Sent	Clinical Context
0002-3941-5897	15/04/2013 10:14	-	Riley, Matthew	Unbooked	Referral	-	Surgery - Vascular / Not Otherwise Specified
			Riley, Matthew	Unbooked	Referral	-	GI and Liver (Medicine and Surgery) / Lower GI (medical)
			Riley, Matthew	Unbooked	Referral	-	Children's & Adolescent Services / Allergy
			Riley, Matthew	Unbooked	Referral	-	Orthopaedics / Shoulder and Elbow
			Riley, Matthew	Unbooked	Referral	-	Gynaecology / Menstrual Disorders
			Riley, Matthew	Unbooked	Referral	15/04/2013	Dermatology / Acne
			Riley, Matthew	Past	Referral	12/03/2013	Ear, Nose & Throat / Nose / Sinus
			Riley, Matthew	Cancelled	Referral	26/02/2013	Dermatology / Not Otherwise Specified
			Riley, Matthew	Past	Referral	-	Children's & Adolescent Services / Orthopaedics
			Riley, Matthew	Past	Referral	20/02/2013	Orthopaedics / Hip
			Riley, Matthew	Cancelled	Referral	-	Orthopaedics / Hip
			Riley, Matthew	Past	Referral	12/11/2013	Diagnostic Physiological Measurement / Audiology - Hea

Actions menu for UBRN 0002-3941-5897:

- Update/Book
- Cancel Request**
- View Request
- Add Referral Letter
- Add Additional Requirements
- View History
- Make Content Sensitive

4. Choose – ‘Request raised in error’ yellow dropdown – add notes - click ‘Cancel Request’



Cancel Appointment Request

UBRN: 0002-3941-5897

Clinical Term: -

Speciality: Orthopaedics

Clinic Type: Not Otherwise Specified

Service(s): Telephone Assessment

Location: [Empty]

Referrer Alert: [Empty]

Service Name: Sussex MSK Partnership [East] - Orthopaedics NXX01

Organisation Type: Independent

Priority: Urgent

Service Selection: -

Override Reason: [Empty]

Content Sensitive: No

Reason: Request raised in error

Reason for Cancellation Comments: Duplicate referral see LBRN 0002-0000-0000

Buttons: Don't Cancel Request, Cancel Request

5. DOUBLE CHECK THIS IS THE CORRECT REFERRAL TO CANCEL

The following warning will pop up – click ‘Yes’ if you are happy this is the correct referral