

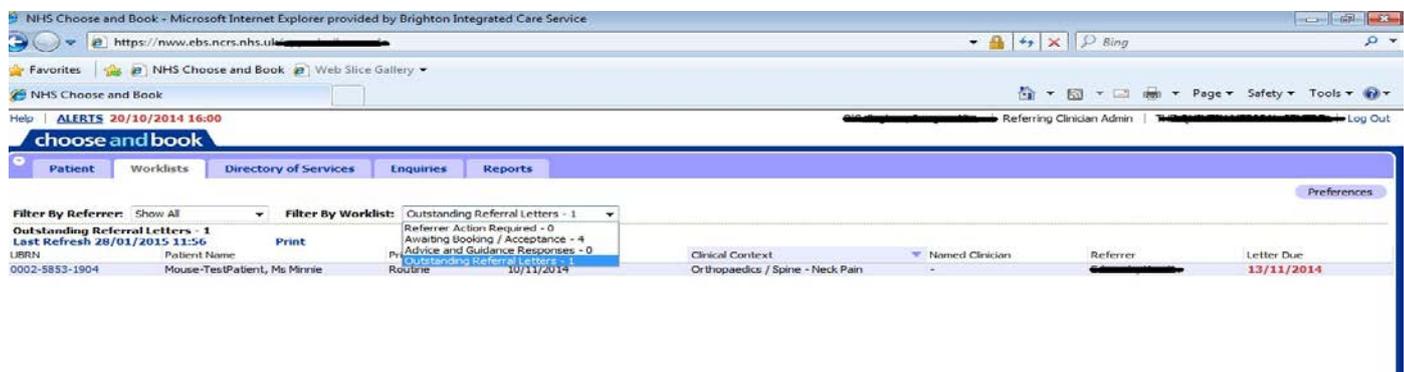
# YOUR GUIDE TO REVIEWING WORKLISTS IN CHOOSE AND BOOK

Choose & Book is a method used by GP practices to send referrals to Sussex MSK Partnership electronically. This is the fastest and safest method and enables the referral letter to be held electronically rather than on paper. It also ensures a full audit trail. Practices are responsible for reviewing their worklists on Choose & Book. There are two main worklists that need to be regularly checked by surgeries:

**Awaiting Booking Acceptance (ABA)** – this list will show referrals that have been successfully raised and have a referral letter attached. (ONLY referrals in this list will be picked up by the MSK Partnership daily).

**Outstanding Referral Letters (ORL)** - referrals in this list **DO NOT** have a referral letter attached and **CANNOT** be picked up by the MSK Partnership for processing. A referral will be added to the 'Outstanding Referral Letters' worklist when you have not submitted a referral successfully. This usually means that you have not attached the referral letter before submitting so will it need to be added. **As a general rule it is good practice to check the Outstanding Referrals Worklist at least once a week.**

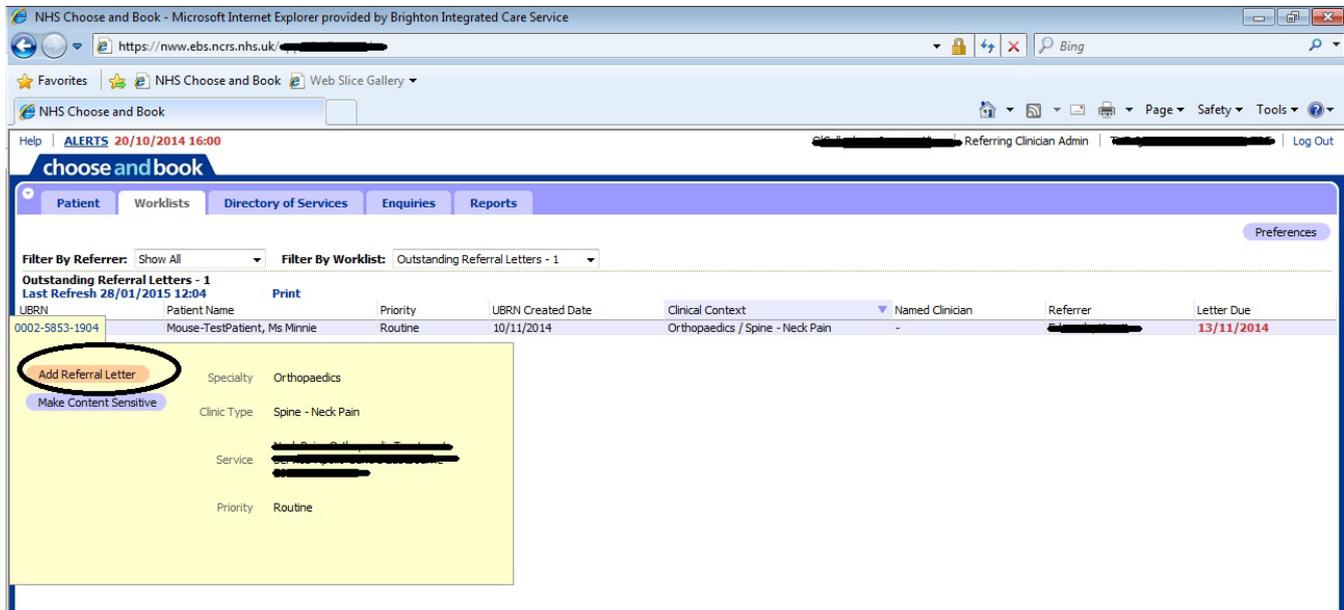
To open the Outstanding Referrals worklist, click on worklist tab at the top of the screen and then select 'Outstanding Referral Letters' from the dropdown filter. Note: The number of outstanding referral letters is indicated on the drop down list.



Referral ID	Patient Name	Priority	Clinical Context	Named Clinician	Referrer	Letter Due
0002-5853-1904	Mouse-TestPatient, Ms Minnie	Routine	Orthopaedics / Spine - Neck Pain	-	-	13/11/2014

**Until you add the referral letter the MSK service is unable to process the referral. It is therefore important that the referral letter is attached in good time and that this worklist is reviewed at least once a week.**

**To attach a referral letter:** Within the worklist, click on the Unique Booking Reference Number (UBRN) of the patient you wish to attach the referral letter for. Click 'Add Referral Letter'



The letter may be retrieved and attached from whichever IT system is in use at your practice. Additional attachments i.e. results may also be attached at this point.

Once you've done this click submit in the bottom right hand corner.

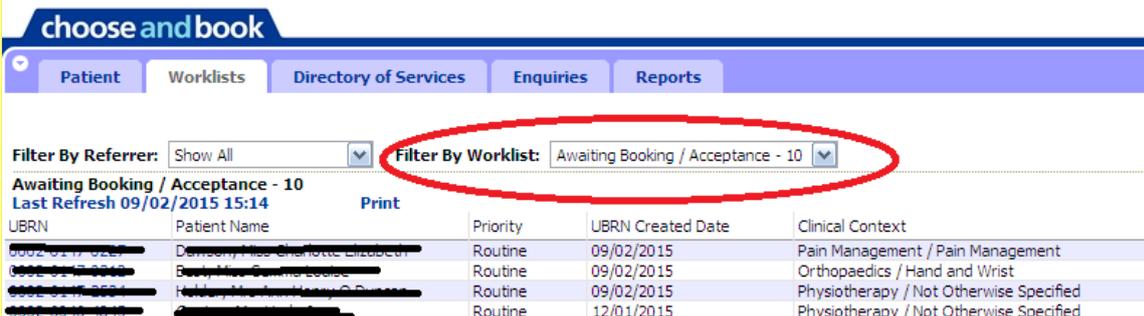
***If there are UBRN's in the worklist for more than two weeks, the patient will receive a letter from Choose and Book head office in Milton Keynes asking the patient to book an appointment, this is to make sure that you are alerted that their referral has NOT been successfully submitted. If the patient receives this letter it is usually the case that the referral has NOT been actioned correctly and will be on a waiting list in Choose and Book. Please go to the Outstanding Referral List; find the UBRN and attach the referral letter. You can contact the MSK service to inform them the referral can now be processed and it will be prioritised. Alternatively, referrals are automatically imported by Sussex MSK Partnership within 24 hours.***

***PLEASE BE AWARE THAT THIS CAN AFFECT ALL REFERRALS IN CHOOSE + BOOK***

### Crosschecking Worklists

In order to mitigate any risks of referrals not being correctly raised and sent to Sussex MSK Partnership every practice needs to have a robust crosscheck in place when raising referrals and Sussex MSK Partnership would suggest the following:-

1. A referral is raised via the clinical notes system – the Choose & Book worklist **Awaiting Booking Acceptance** is checked immediately – if the referral is in the worklist it has been raised successfully.



The screenshot shows the 'choose and book' interface with the following details:

- Navigation tabs: Patient, Worklists, Directory of Services, Enquiries, Reports
- Filter By Referrer: Show All
- Filter By Worklist: Awaiting Booking / Acceptance - 10** (highlighted with a red circle)
- Summary: Awaiting Booking / Acceptance - 10, Last Refresh 09/02/2015 15:14, Print
- Table with columns: UBRN, Patient Name, Priority, UBRN Created Date, Clinical Context

UBRN	Patient Name	Priority	UBRN Created Date	Clinical Context
0002-02-11-0221	Doreen, Mrs Charlotte Elizabeth	Routine	09/02/2015	Pain Management / Pain Management
0002-02-11-0221	Doreen, Mrs Charlotte Elizabeth	Routine	09/02/2015	Orthopaedics / Hand and Wrist
0002-02-11-0221	Doreen, Mrs Charlotte Elizabeth	Routine	09/02/2015	Physiotherapy / Not Otherwise Specified
0002-02-11-0221	Doreen, Mrs Charlotte Elizabeth	Routine	12/01/2015	Physiotherapy / Not Otherwise Specified

2. If the referral is not in **Awaiting Booking Acceptance** then worklist **Outstanding Referral Letter** must be checked. If the referral is found on this list then no referral letter has been attached and it must be attached in Choose & Book (in the worklist click on the UBRN – Add Referral Letter – search on the local drive for the record – attach and name in Choose & Book).
3. If the referral is not on either worklist then the clinical notes system has not raised a referral – refer to your clinical notes and/or Choose & Book-clinical notes guide to resolve this issue.
4. If the clinical notes system is temporarily unable to raise referrals it is possible to raise the referral in Choose & Book provided you can access the referral letter and attach it (in the patient record in Choose & Book use the Refer/Advice button). You will need to ensure that a record of this referral is subsequently added to the clinical notes system once it is available again.

For additional information regarding the maintenance of worklists please refer to the Choose + Book website (link below) or contact Sussex MSK Partnership Clinical Referral and Assessment Service.

<http://www.chooseandbook.nhs.uk/staff/training/materials/r43man>

To contact the Clinical Referral and Assessment Service Team:

Call: 0300 300 0003

Email: [smskp.east@nhs.net](mailto:smskp.east@nhs.net)

For more information visit our website: [www.sussexmskpartnership.co.uk](http://www.sussexmskpartnership.co.uk)