

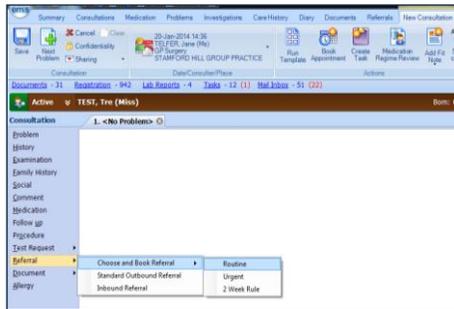
1. Introduction

This quick reference guide can be used as a reference document in conjunction with formal training. We also recommend our Referring a Patient and Referrer Worklists e-learning modules. All Choose and Book training materials are available at: www.chooseandbook/staff/Training. You can access training documentation for EMIS Web via the Support Centre, via the link on the EMIS Web homepage.

2. Starting to create a referral

Within EMIS Web, ensure the patient is selected, you are logged on using your smartcard and that the PDS is synchronised (blue). Create a referral in one of the following ways:

From within a **Consultation**, select **Referral** on the left-hand pane, point to **Choose and Book Referral** and then select an appropriate **Priority**.



OR From the Care Record, select the **Referrals** tab, on the ribbon, click , point to **Choose and Book Referral** and then select an appropriate **Priority**.



If you are creating a referral on behalf of a GP, specify a clinician by completing the **Referring Clinician** field. Next, complete the following:

- ◆ Select the picklist icon  and pick a GP from the list displayed or select  to search for a GP.
- ◆ Click on **OK**.

Note: If you are a GP creating a referral, this field is not displayed.

Choose and Book is launched within EMIS Web, displaying the **Service Search Criteria** screen. The **Appointment Type** and **Priority** fields are completed with the information you entered in EMIS Web. If you are referring on behalf of a GP, you will need to re-select a **Referring Clinician** on this screen.

At this stage, a Unique Booking Reference Number (UBRN) is created within EMIS Web **but not yet completed** in Choose and Book. It is displayed at the bottom left of the screen. You **must** complete the whole referral process to ensure the referral is created correctly. If no UBRN is displayed on this screen, refer to the EMIS Web User Guide on how to resolve this.

At the bottom right of the screen, two sets of buttons are displayed:



The upper set are Choose and Book buttons to help you to create the referral. The lower set, in grey, are part of EMIS Web. To explain the EMIS Web buttons:

Defer - This will do the following:

1. Save the UBRN to the patient's care record in EMIS Web. The UBRN **will not** be created in Choose and Book.
2. Create a **Pending CAB Service Selection** task in the Referral Management section of Workflow Manager in EMIS Web.
3. Close Choose and Book and open the CAB Referral screen in EMIS Web.

Note: If you use the Defer button *before the referral* is completed in Choose and Book a referral will not be created (even though a UBRN is visible in Emis Web).

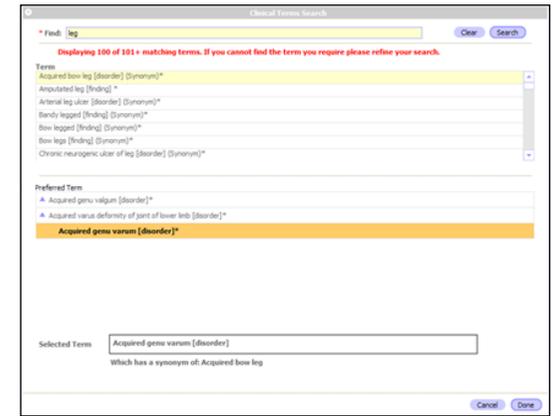
Service Selected - This button *should not* be selected at this stage. Wait until the end of the referral process so you can complete the Referral Letter window. If you press this button too early a warning message is displayed. Therefore to avoid losing the referral make sure you select the **Yes** option within the warning message.

Cancel - This option will cancel the referral creation process. Even if a UBRN is visible in Emis Web, it will not be completed in Choose and Book.

3. Complete your referral using Clinical Terms

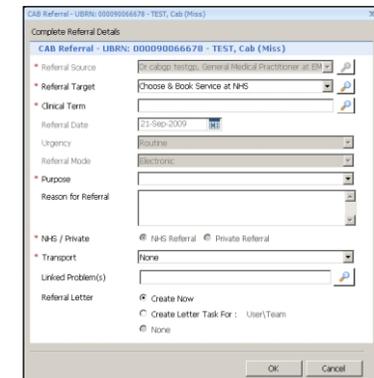
Using Clinical Terms is the most accurate way to search for suitable clinics on Choose and Book. Clinical Terms are very similar to the Read codes you put into your GP system. To create the referral in Choose and Book:

- ◆ In the **Clinical Term** field, type the term you want to search for.
- ◆ Click on the  and a **Clinical Terms Search** screen is displayed with your term showing in the **Find** field.



- ◆ Select the **Search** button. A list of clinical terms is displayed in the **Terms** field.
- ◆ Click on the term that matches the patient's condition/symptoms from the list displayed. More terms are displayed in the **Preferred Term** field.
- ◆ Click on the preferred clinical term, which will be displayed in the **Selected Term** field.
- ◆ Either select the **Done** button at the bottom of the screen or start again by clicking on the **Clear** button, at the top of the screen. Back in the **Service Search Criteria** screen, the **Clinical Term** field is populated.
- ◆ Select either **Search Primary Care** or **Search All**.
- ◆ On the **Service Selection** screen, with the patient, select a service/s.
- ◆ Select either **Request**, to allow an appointment to be booked later or, if the service is directly bookable, pick the **Appointment Search** button to book an appointment.
- ◆ Select **Submit** to complete the referral.
- ◆ At the bottom of the screen use the **Print** button to print a handout (with password), giving information on how to book/change an appointment.
- ◆ Click on the **Service Selected** (EMIS Web button) at the bottom of the screen to ensure that the UBRN is completed in Choose and Book, as well as in EMIS Web.

You are returned to EMIS Web, and the **Complete Referral Details** screen is displayed:



In this screen, the following mandatory fields (marked with a red asterisk *) *must* be completed before moving forward: Referral Target; Clinical Term; Purpose; NHS/Private, and Transport.

In the **Referral Letter** section, you can choose to create a referral letter now or later. Choose one of the following options:

- ◆ **Create Now:** To access the Generate Choose and Book Letter screen and create the letter yourself at this point; or to attach a letter you have already created and filed in EMIS Web.
- ◆ **Create Letter Task For:** To create a task in the Referral Management section of Workflow Manager for another user to complete. Select **User/Team** and then use the **Find User/Team** screen to pick a user or team to allocate the task to.

Note: For further details, see sections 3 and 4.

4. Complete your referral using Speciality/Clinic Type

On the **Search Criteria** screen, find an appropriate **Speciality** and **Clinic Type** from the picklists available (instead of the Clinical Terms field). Then use the same process for creating a referral as before.

5. Complete your referral using Named Clinician

In the **Search Criteria** screen, beside Named Clinician, click  and use the fields available to search for a clinician. Click on the name to highlight the clinician and then click **Done**. This can be used in conjunction with either the Clinical Term OR Speciality/Clinic Type searches and by using the same process for creating a referral as before.

6. Attach supporting information in EMIS Web

It is extremely important that referrals are supported by a referral letter, clinical information, template etc. The national guidance for attaching supporting information is 1 day for 2WW and Urgent referrals and 3 days for Routine referrals - after this time providers may contact you. Supporting information should not be faxed (unless in exceptional circumstances) but always attached to the referral. Here is a brief description of how to attach supporting clinical information, but you should refer to the EMIS Web User Guide for full details.

During referral creation

Once you have picked the **Service Selected** button to complete the referral process in Choose and Book, the **Complete Referral Details** screen is displayed. From this screen:

- ◆ Pick **Create Now** and select **OK**. Next the **Generate Choose and Book Letter** screen is displayed. In the left-hand pane, pick one of the following options, as required:
 - ◆ **CAB Letter Text:** Complete this free text box as appropriate.
 - ◆ **Referral Letter:** This section allows you to attach documents. To open one from your EMIS Web document folder, complete the

form or letter. Once completed you do not need to save this document but you should go back to the Clinical Content section to check it. **Note:** Although your letter will disappear from the screen, it is not lost.

- ◆ **Clinical Content:** Select one or more entries from the following sections – Consultations, Investigations, Family History, Housing, and Employment, as required. The following sections are auto populated with the patient's clinical details - Risk to Others, Medication, Problems, Allergies, Values, Alcohol Consumption, Smoking, Non-Therapeutic Drug Use; you can deselect as required to remove them from the referral.
 - ◆ **Preview:** This displays your finished supporting information.
- ◆ If you have already generated supporting information, in the **Clinical Content** section, find and select the attachment in the patient's documents, filtering out inappropriate information, as required.
- ◆ Once each section is completed, select **Authorise and Send** or **Send for Authorisation**, depending on your local process.

From the Task Menu

If you want to add supporting information at a later stage and have filed this in EMIS Web, you can access it by opening Referral Tasks and selecting the appropriate patient. Complete as per *During referral creation* section. To add attachments or a referral letter from EMIS Web, do the following:

- ◆ On the **Clinical Content** section, select **Attachments**.
- ◆ Select the required attachments and in the CAB Letter text field type 'see attached letter'.

Note: The total attachments selected must not exceed 5MB. The following file formats can be accepted: Plain Text (.txt), HTML Text, PDF, XML Text, RTF Text (.rtf), Docman (ensure you are logged into Docman or a blank sheet will be attached), Basic Audio, MPEG audio, PNG Image, GIF Image, JPEG Image TIFF Image, MPEG Video, MSWORD.

7. Add or change existing supporting information

You can amend, or add more supporting information to a referral but it is important to note that when attaching a referral letter via EMIS Web, you **must** make any changes, for example, adding test results, **via EMIS Web**.

Do the following:

- ◆ On the **Patient's Care Record Referrals** tab, select the required referral and on the ribbon, click **Edit**.
- ◆ The **Outbound Referral Details** screen is displayed. At the bottom of the screen, click **Edit Now** and then click **OK**.
- ◆ The Edit Referral message screen is displayed, click **Yes** to proceed with editing.
- ◆ On the **Generate Choose and Book Letter** screen you can:
 - ◆ Edit an existing document, select **Referral Letter** and edit as required.
 - ◆ Add more attachments (e.g. test results), select **Clinical Content** and then click **Attachments**. Select the document/s required and click **Authorise and Send**.



QUICK GUIDE For Referrers/GP Practices to use Choose and Book with EMIS Web

Included in this guide:

1. Introduction
2. Starting to create a referral
3. Complete your referral using Clinical Terms
4. Complete your referral using Speciality/Clinic Type
5. Complete your referral using Named Clinician
6. Attach supporting information in EMIS Web
7. Add or change existing supporting information

For training materials and further information visit www.chooseandbook.nhs.uk/staff/training

This guide cannot detail all the possible functions within Choose and Book or Emis Web.
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