

## **Process for the End Point ICG (Integrated Care Gateway) referrals in General Practice (Emis) previously known as the referral portal**

This guide is appropriate for referrals that currently go through the eRS service (excluding 2 week wait referrals).

### Pre-requisites

Before attempting to refer a patient to the TRISH service, consider the following.

- Patient demographics are correct and up to date in Emis Web
- All relevant clinical data has been added to the record prior to commencing the referral (data will be mail merged from the record in to the referral forms)
- The correct and up to date referral forms are available in Emis Web prior to commencing the referral to ensure the correct data is mail merged and ensure the referral is not returned
- A Referral Read Code formulary is available to ensure that coding is correct and consistent
- The Emis Web address book contains correct options to cover the new referral process to ensure correct and consistent data entry for each type of referral
- A folder structure is created on the user's PC that will enable the documents to be exported in to discrete folders and uplifted to ICG so that the correct referral forms and data are attached to the correct referral
- All relevant practices and individuals involved in the referral process have an active NHS Mail account (as below)
- The patient has been informed of how the TRISH referral process will work and provided with a TRISH Patient Leaflet and the practice has gained all relevant patient consent

### NHS.Net account settings and configuration

In order to access notifications from TRISH, access to the practice's generic NHS.Net account will be required. This can be done either by accessing a personal NHS.Net account and adding the generic account (as per document below), or by adding the NHS.net account via the Outlook client (see document below). Generic accounts cannot be accessed directly using a user name and password – they must be accessed via individual email accounts. There is no specific recommendation as to how the emails are accessed, as long as a process is in place to ensure the Inbox is monitored.



Accessing NHSMail  
via Outlook Final



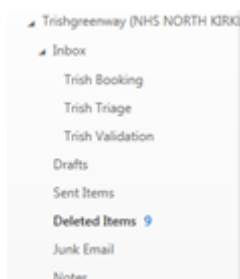
NHS Mail Personal  
Account Guide



NHS Mail Shared  
Mailbox Guide

## Emails received from TRISH

During the training on the ICG software the trainer will configure the generic email account to organise the emails in order to organise the responses received in the practice's generic email. Several folders will be created in the account and rules will be created to automatically forward the relevant emails in to the relevant folder.



There are five different types of email that the practice will receive from the TRISH service:-

- Validated Referral – No action required
- Triage Completed – No action required
- Booking Completed – No action required
- Referral Returned (action required – stored in the inbox of the generic email account)
- Triage Response Required (contains a link to provide response)

The practice need to agree on a method of managing the inbox and the emails from TRISH, for example archiving emails for action, extracting and importing in to the Patient's record or using tasks. Returned referrals may require an additional, new, referral being raised and submitted and the practice should agree a process that will deal with them effectively. Triage Response Required will also need a locally agreed process.

## Referral Processes

Different practices, indeed different clinicians within the same practice, will have different processes to initiate, create, check and send referrals. For example, a clinician may choose to complete the letter template themselves and send a task to the Secretarial team to instruct them to complete the process. A clinician may choose to dictate the referral and leave the whole process to a Secretary. The TRISH process does not dictate that a specific process is followed and each of these existing processes can still be used when referring. However, careful consideration must be given to the process and each member of staff must be aware of their duties and how to fulfil them.

**Note** - Unless otherwise specified, any specific letter templates that are currently required to support a referral to a service should still be completed and added to the TRISH referral as an attachment.

## Referral Process - Routine

The decision to refer a patient is made. At this point, ensure that any supporting data required for the referral is captured and saved to patient record – for example problem headers/diagnosis, pathology/imaging reports, height/weight, smoking status etc...

Ensure that the patient has received a copy of the TRISH patient leaflet .

Firstly, open patient record and click Consultations. To open the referral module window, click the Add drop down menu button, scroll down to 'Referral' and click on 'Standard Outbound Referral'.

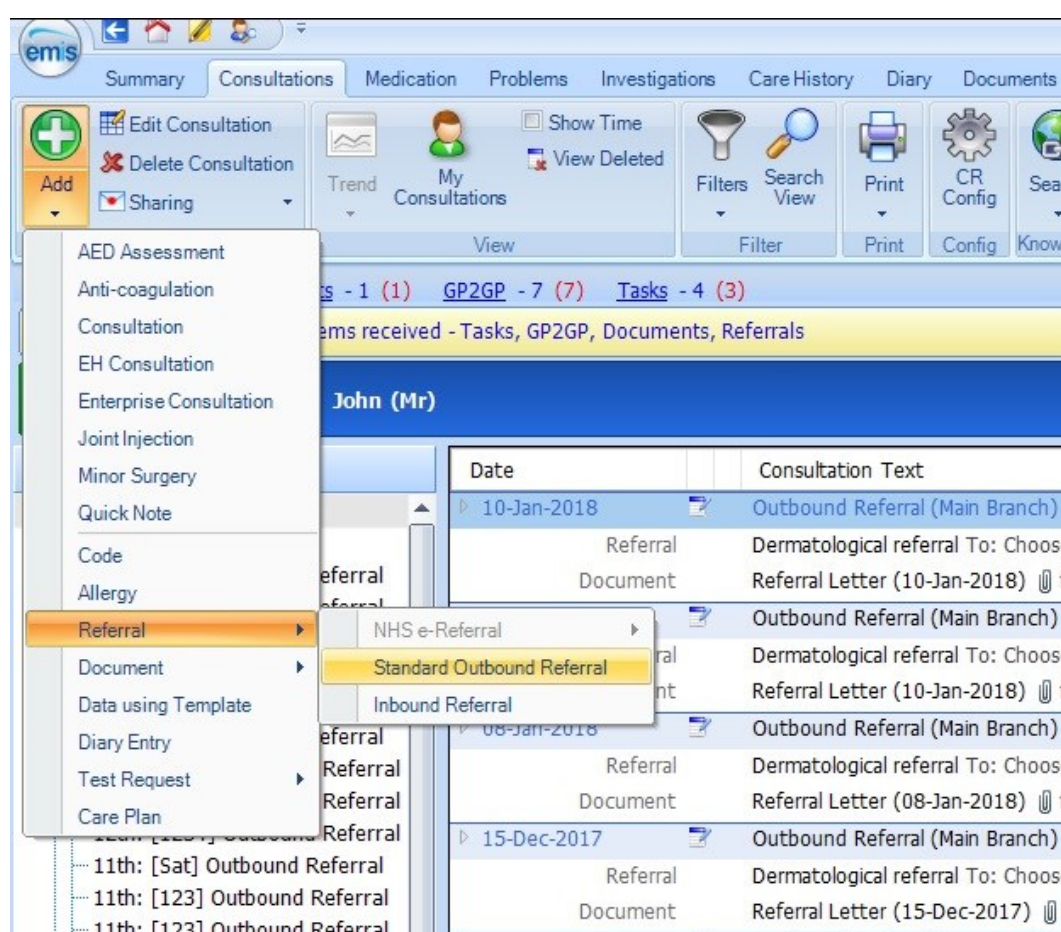


Fig 1

Complete the referral module, ensure that all mandatory fields denoted by a red asterisk are completed.

Please ensure that you select the appropriate 'Clinical Term' read code at this stage.

Once all information is complete click Ok.

Fig 2

Select the 'TRISH – EMIS WEB – 1.0' Template and click Ok.

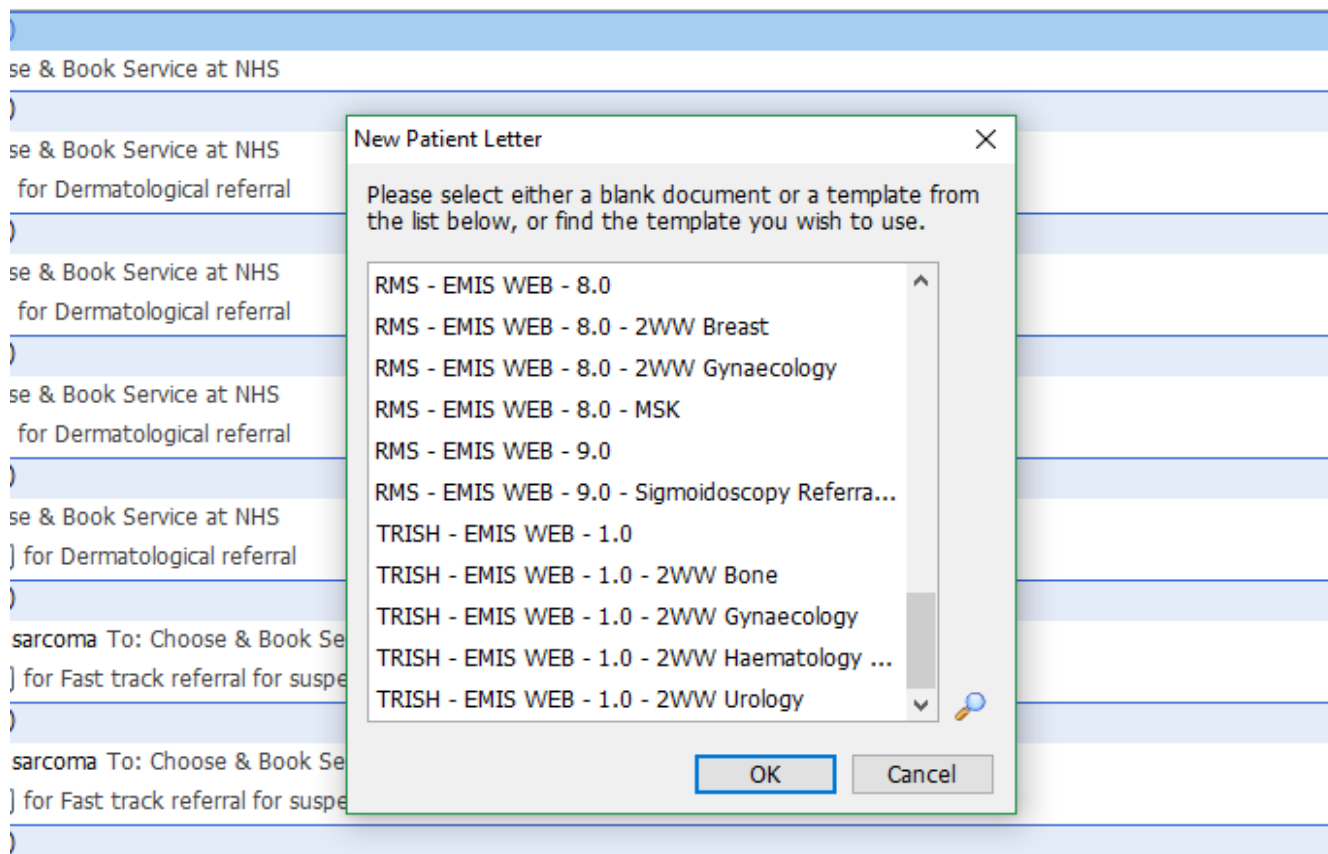


Fig 3

Enter the GMC/NMC code of the referring clinician, you can also enter the referral specialty and clinic type at this stage.

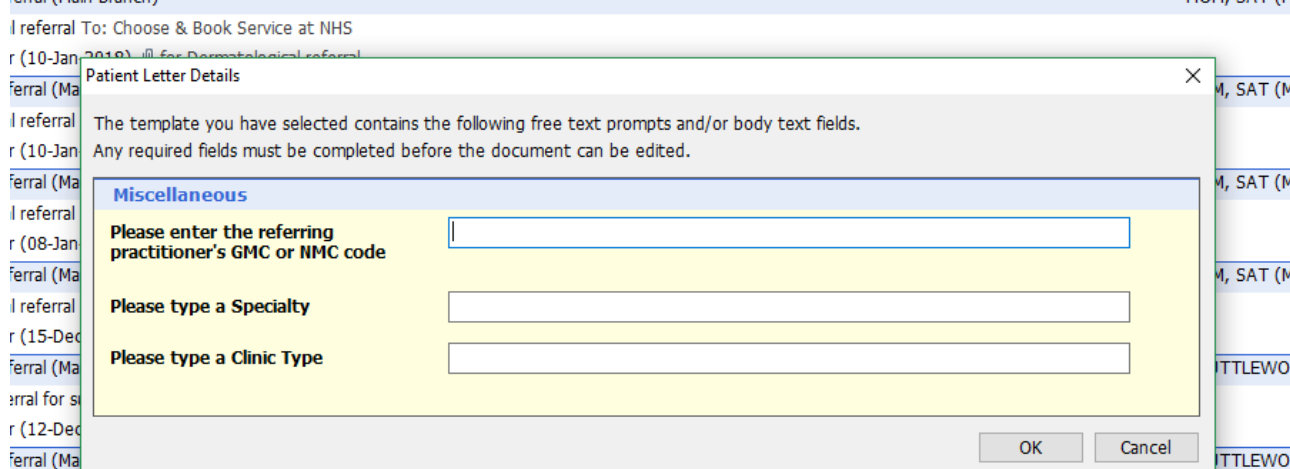


Fig 4

Many fields are pre-populated with data from the patient record using the mail merge functionality. Check each section to ensure the data is correct and relevant for the referral.

Note – if data are not mail merged in to the letter template, it cannot be entered in to the document. Only fields that have a grey box may have data added in to them. Additional information may be added at the “Attention” section of the ICG Endpoint software (this data will not be recorded in the Emis Web patient record)

Please note that some sections in the following screen shots may be blank as test patients have been used in in the preparation of this document (for example no NHS number). Referrals from real patients will mail merge data that is found in the record. Ensure all relevant data are present in the patient’s Emis Web record prior to starting the referral to ensure it is mail merged automatically in to the referral document.

All data in the Reference/Priority section will be automatically populated using mail merge functionality.

### Reference/Priority

Referral Date: 02 Jan 2018	Priority: Routine	NHS Number:
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Fig 5

All data in the Patient Details section will be automatically populated using mail merge functionality.

### Patient Details

Title: Mr	Forename(s): Steven	Surname:
Date of Birth: 30 May 1980	Gender: Male	Ethnicity:

Fig 6

All data in the Referrer/Practice Details section will be automatically populated using mail merge functionality.

### Referrer/Practice Details

Referring Name: KEITH, Iain (Trainer)	Referrer Code: 5683785	Practice Code: EDSM2
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Fig 7

The 'Specialty' and 'Clinic Type' fields in the Referral Details section will be automatically populated using mail merge functionality. To add text in 'Named Clinician' field click in to the grey box before typing. Note, it is preferential to provide certain details in the "Non-clinical information for booking team" section later in the document.

### Clinic Details

Specialty: Dermatology	Clinic Type: Acne	Named Clinician: <input type="text"/>
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Fig 8

The Patient Choice Preferences section can be left at this point, as these parameters are set in the ICG software later in the process.

### Patient Choice Preferences

Provider 1: TRISH	Provider 2: <input type="text"/>
Provider 3: <input type="text"/>	Provider 4: <input type="text"/>

Fig 9

Only the Preferred Language field will be populated using the mail merge functionality in the Preferences section (Assistance Notes and Preferred Contact Time can be completed by clicking on the grey field and typing text).

### Preferences

Assistance Required: No	Assistance Notes: <input type="text"/>	Confidential/Silent Referral: No
Preferred Contact Time: <input type="text"/>	Interpreter Required: No	Preferred Language: language not specified

Fig 10

To add data in the Assistance Required, Confidential/Silent Referral and Interpreter Required sections, click on the field and choose an option from the drop-down menu: -

Assistance Required:  
No

Preferred Contact Time:

Fig 11

The patient's most recent Height, Weight, BMI and Smoking Status will automatically mail merge in to the Referral Details section. To enter data in to Non-clinical information for booking team section, click on the grey field and type.

### Referral Details

Non-clinical information for the booking team:

Height:  Weight:  BMI:

Smoking Status:  
*No smoking status recorded*

Fig 12

No data are mail merged in the Referral Process Awareness section and both sections must be manually completed, if applicable.

### Referral Process Awareness

I have informed the patient of the process in relation to this referral and who their information may be accessed by:

If No, please state why:

Fig 13

To change the options in the “I have informed the patient of the process in relation to this referral and who their information may be accessed by:” field click on it and then chose an option from the drop down.

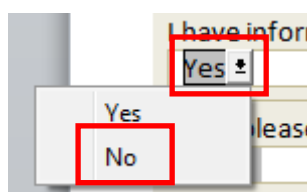


Fig 14

The detail of the referral letter is added in the Referral Reason/Letter Text section. To type in this section, click in the space below the heading and type. Note, text can be copied/pasted into this section (ie from a task).

### Referral Reason/Letter Text

Dear Colleague

Please see this 37 year old patient who was seen in surgery last week complaining of.....

Fig 15



Data from the patient record is mail merged in for each of the subsequent sections:-

- Family History
- Active Problems
- Summary
- Significant Past (ended problems)
- Current Repeat Medication
- Acute Medications (last 3 months)
- Measurements
  - Blood Pressure readings – last 10
  - Height – last 3
  - Weight – last 3
  - BMI – last 3
  - Oxford Knee Score – last 3
- Allergies and Sensitivities
- Lab results – Pathology & Radiology

Irrelevant or data that are not required for this referral can be removed manually at this stage by highlighting and pressing the backspace key on the keyboard.

When the template is ready to be saved, click on 'File' then select either the 'Create Pending Send' or the 'Close and Complete' button. It is vital that the correct option is used. 'Create Pending Send' means the template can still be worked on and amended.

'Close and Complete' will cease the ability to edit the document further. It is vital that the document is saved as 'Close and Complete' before the referral is uploaded to the ICG software.

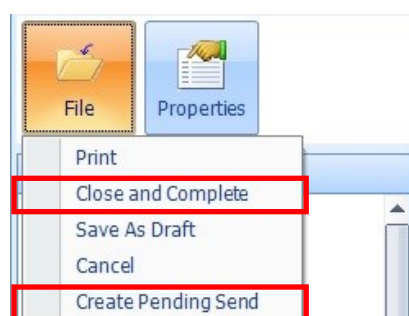


Fig 16

When the referral letter has been 'Close and Complete' it is ready to be uploaded to the ICG software for processing. To begin this process, retrieve the patient referral by clicking on the 'Documents' heading.

Hover over the required referral, right click and select 'Export Document'.

Date	Document Type	Document Title
10-Jan-2018	Referral Letter (10-Jan-2018)	for Dermatologi
10-Jan-2018	Referral Letter (10-Jan-2018)	for Dermatologi
10-Jan-2018	Referral Letter (10-Jan-2018)	for Dermatologi
10-Jan-2018	ICG Booking Summary	ICG2018-00000
08-Jan-2018	Referral Letter (08-Jan-2018)	for Dermatologi
08-Jan-2018	ICG Booking Letter	ICG2018-00000
08-Jan-2018	ICG Booking Summary	ICG2018-00000
05-Jan-2018	ICG Booking Letter	ICG2017-00000
05-Jan-2018	ICG Booking Summary	ICG2017-00000
03-Jan-2018	ICG Booking Letter	ICG2017-00000
03-Jan-2018	ICG Booking Summary	ICG2017-0000020166 2WW/2WW Lower GI Booking Summary
03-Jan-2018	ICG Booking Letter	ICG2017-0000020165 Allergy/Allergy Booking Letter

Fig 17

Browse your directory and save the referral in the Trish Referrals folder.

A copy of the referral letter has been exported to the folder and, if correctly configured, the referral will show within the Pending Upload heading of the ICG Endpoint software will automatically upload it. Refer to the ICG training materials for processing the referral within the ICG software (below).

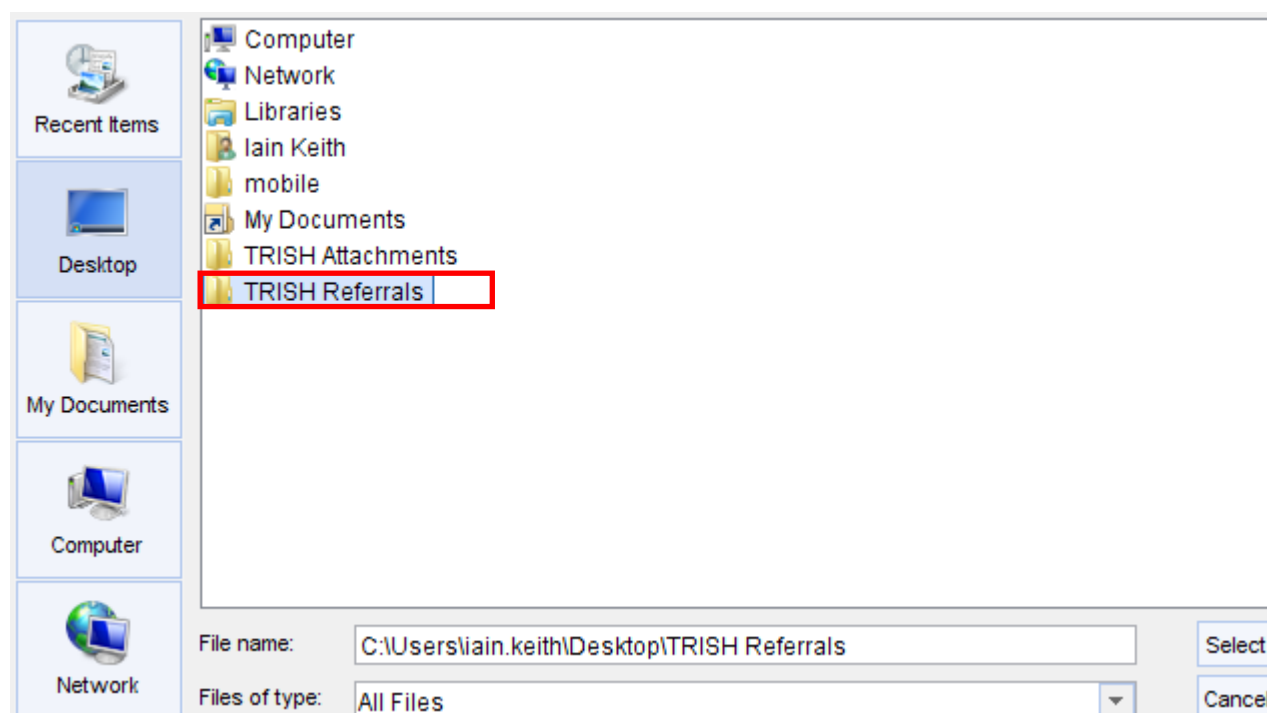


Fig 18

## Exporting attachments

Some referrals will require additional documentation to be provided with it (ie copy of a letter). These documents will be exported from the Patient's Emis Web record to a folder and uploaded/attached to the referral in the ICG software. To begin the process of exporting the documents, open the patient's record and select the Documents heading. Hover over the required document as shown in **figure 16**, right click and select 'Export Document'.

Browse your directory and save the referral in the Trish Attachments folder.

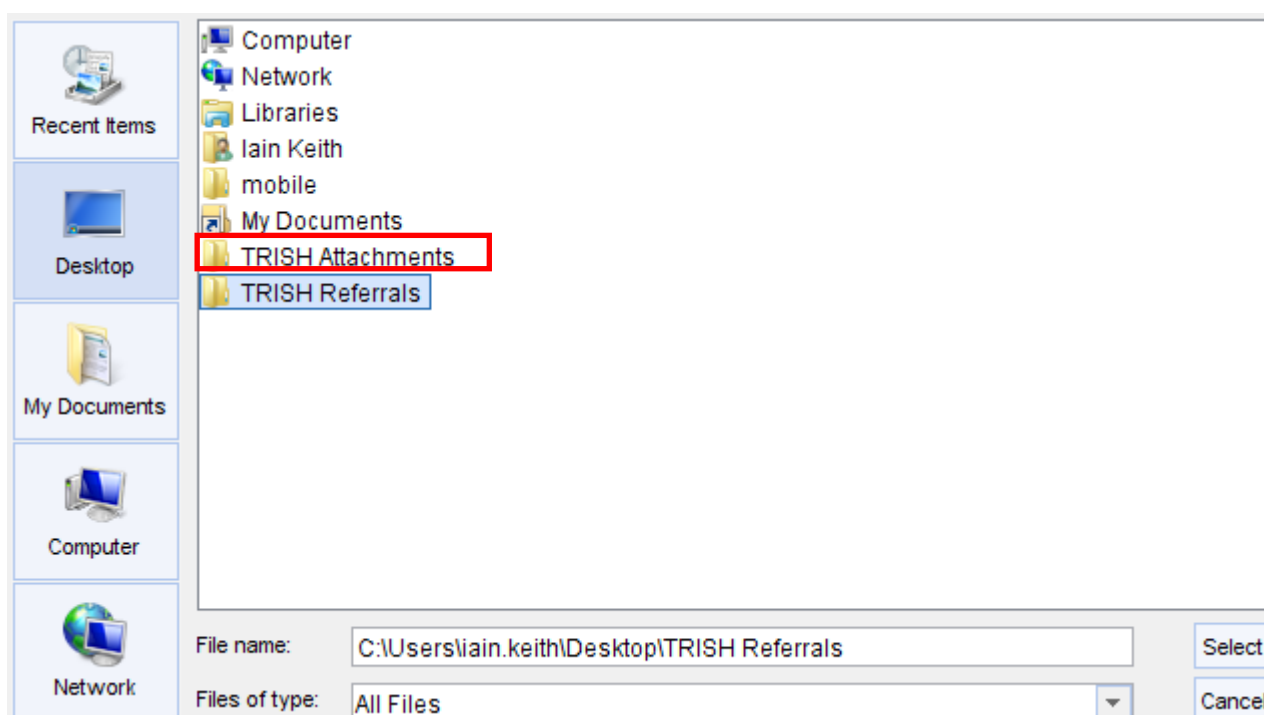


Fig 19

Repeat to export all documents required. Refer to the ICG training manual for details of attaching documents to the referral.

## Using the ICG software to upload referrals to TRISH



ICG EndPoint - User  
Guide

## Support

For queries about the ICG Endpoint, please email [support@accenda.eu](mailto:support@accenda.eu)

Please direct any questions or queries about the referral process to the TRISH team on the following number:- **01924 317770** or email [TRISH@wakefieldccg.nhs.uk](mailto:TRISH@wakefieldccg.nhs.uk) or [TRISH@northkirkleescg.nhs.uk](mailto:TRISH@northkirkleescg.nhs.uk)