

Creating and Processing Internal Referrals on TrakCare



Document version: 1.2

Date of last revision: 22nd March, 2018

Owner of document: eHealth Operations | Direct User Support

Documentation control

Version history

Version:	Date:	Details/Comments:	Authors/Contributors:
0.1	02/10/2017	1 st version	<i>Shameem Akhtar (Snr. Business Analyst/Project Lead – EPR); John Kerr (Facilitator, Proactive Support North)</i>
1.0	15/02/2018	In progress	<i>Shameem Akhtar (Snr. Business Analyst/Project Lead – EPR); John Kerr (Facilitator, Proactive Support North)</i>
1.1	19/03/2018	In progress	<i>Shameem Akhtar (Snr. Business Analyst/Project Lead – EPR); John Kerr (Facilitator, Proactive Support North)</i>
1.2	22/03/2018	Final version	<i>Shameem Akhtar (Snr. Business Analyst/Project Lead – EPR); John Kerr (Facilitator, Proactive Support North)</i>



© Copyright NHS Greater Glasgow and Clyde 2018 | Property of eHealth Operations – Proactive Support
Permission is hereby given to NHSGGC staff to download/print/copy for personal use only. All other rights are reserved.

Summary

A new workflow in **TrakCare** provides the functionality for clinicians at GGC to refer a patient from their clinic to another outpatient specialty.

- A new workflow has been added to appropriate RBACs (security groups)
- The new tab is labelled **INTERNAL REFERRAL**

1. Creating the Internal Referral

From the **OUTPATIENT WORKLIST**:

- Select the patient details
 - Select **INTERNAL REFERRAL** tab/workflow*
- *NOTE: Some users will have an independent **INTERNAL REFERRAL** tab option whilst others will find it located under the **REFERRALS** tab.

Internal Referral

The patient's **DEMOGRAPHIC DETAILS** are displayed.

Internal Referral Patient Find > Patient List > Person External List > Person External List > Patient Details > Waiting List Inquiry List > Waiting List Edit

Legal Record Move Episode Tree Results Adhoc Request Episode Enq Episode Enq Popup

CHI: Name: Gender: Female DOB: Age: 34 Yrs Phone:

PA Person Banner: 0.050980 (secs), 22930 (lines), 2006 (jobs)

Patient Options Letters Print Help

Demographic Details

CHI Number: 1112326286
Merged Numbers:

Patient Details

Surname: Forename: Middle Name: Title: Mrs Marital Status: Married (including separate) Gender: Female Date of Birth: Age: 84 Yrs Unknown DOB:

GP Details

Reg GP Name: L Alguero
GP Surgery Address: 43542/2, Dr Luis Alguero, Possilpark Health & Care Centre, 99 Saracen Street, GP Phone: 0141 800 0820

Permanent Address

Address Line 1: Address Line 2: Town / City: Glasgow County: Lanarkshire Postcode: G21 1XP Health Board of Residence: Greater Glasgow & Clyde Home Phone: Work Phone: Mobile Phone: E-mail: Preferred Contact Method:

Religion: Not known Ethnicity: Other British(white) Interpreter Required: Preferred Language: Armed Forces:

Update

PATIENT SUMMARY icon is displayed on the Patient Banner

Please check the patient contact details are correct. Make changes if required and click Update

[Audit Trail](#) [Audit Footprint](#)
[Alias](#) [Other Address](#)
[Contact Details](#) [Other Numbers](#)
[Other Professionals](#) [Alerts](#)
[View GP Details](#) [UnMerge Patient](#)
[View Dentist Details](#)

- Make any required changes before clicking **UPDATE** (as per on-screen instructions)

The **WAITING LIST ENTRIES** screen will be displayed.

Internal Referral Patient Find > Patient List > Person External List > Person External List > Patient Details > Waiting List Inquiry List > Waiting List Edit

Legal Record Move Episode Tree Results Adhoc Request Episode Enq Episode Enq Popup

CHI: Name: Gender: Female DOB: Age: 84 Yrs Phone:

PA Person Banner: 0.027996 (secs), 22950 (lines), 2006 (jobs)

Waiting List Options Print Help

Waiting List Entries

New Please check the patient is not already on an existing waiting list for the problem for which you are referring them. If you wish to proceed with a new referral please click **'New'**.
Total Number of Records 15

Select	Status	UCPN	CHI	Surname	Forename	Age	Days on List	Guarantee Date	Specialty	Appointment Type	Named Consultant	Priority	Contact Letter Date	Reminder Letter Date
<input type="checkbox"/>	Done					84	35 (5)	10/03/2011	Ear, Nose & Throat (ENT)	G N ENT	Mr David Simpson	ROUTINE		
<input type="checkbox"/>	Done					4	5 (0)	08/09/2011	Cardiology	G N CARDIO NURSE	Nurse Kathryn Joss	URGENT		
<input type="checkbox"/>	Done					84	1 (0)	12/04/2012	Respiratory Medicine	NEW	Tech Resp Carter	ROUTINE		
<input type="checkbox"/>	Done					84	20 (2)	12/09/2012	Ear, Nose & Throat (ENT)	G N AUDIO	Audiologist Generic North	ROUTINE		
<input type="checkbox"/>	Done					84	6 (0)	28/09/2012	Gastroenterology		Nurse Annrose Boyd	URGENT - SUSPECTED CANCER		
<input type="checkbox"/>	Removed						1 (0)	15/11/2012	Gastroenterology	G N GASTRO	Stobhill Generic Gastroenterology Consultant	URGENT - SUSPECTED CANCER		

- d. The **Status** of the WL entry (as selected from the Outpatient Worklist) will be shown as **DONE** (as the patient has been marked as having 'arrived' at the clinic).

<input type="checkbox"/>	Done	84	22 (3)	05/10/2015	Rheumatology	G N RHEUMATOLOGY	ROUTINE
<input type="checkbox"/>	Done	84	14 (2)	21/06/2017	Geriatric Medicine	G N URG CARE OF THE ELDERLEY	URGENT

- e. Click **NEW** button ONLY after checking to see that a Waiting List entry for the referral that you are making does **NOT** already exist.

The **REFERRAL DETAILS** screen will be displayed.

The screenshot shows the 'Referral Details' screen with the following fields and values:

- CHI:** [Blank]
- Name:** [Blank]
- Gender:** Female
- DOB:** [Blank]
- Age:** 84 Yrs
- Phone:** [Blank]
- UCPN:** [Blank]
- Primary UCPN:** [Checked]
- List Type:** Outpatient Wait List
- Date Referral Letter:** 29/09/2017
- Date Ref Received:** 29/09/2017
- Date Added:** 29/09/2017
- Vetted Priority:** Not Vetted
- WL Type:** True waiting list
- Referrer Priority:** ROUTINE
- Referral Source:** Consultant at this Health B
- Internal Referrer:** TrakTester Shameem Akh
- Admin Category:** NHS
- Intended Management:** Outpatient
- Hospital:** Queen Elizabeth University
- Specialty:** [Blank]
- Appointment Type:** new
- Named Consultant:** [Blank]
- Short Notice:** [Unchecked]
- Vetting Comments:** [Blank]
- Other Referral Details:**
 - PatientType:** New Outpatient
 - Patient Willing to Change Clinician:** Yes
 - Patient Willing to Change NHS Board:** Unknown
 - Suitability of Patient:** Yes
 - Admission Transport:** [Blank]
 - In UK Last 12 Months:** Yes
 - Staying Permanently:** Yes
 - OS Visitor Status:** Not Applicable
 - Edit Letter:** [Unchecked]
 - Recall Date:** [Blank]
 - Add Manual Recall Date:** [Checked]

Some fields will be auto-populated.

Use the spyglass to look-up other values and amend where appropriate.

- ↳ **REFERRER PRIORITY** can be changed if required. The default value will be **ROUTINE**.
- ↳ **REFERRAL SOURCE** value will default to **CONSULTANT AT THIS HEALTH BOARD**. This **must** be changed to **AHP** if **AHPs** are creating the referrals.
- ↳ **INTERNAL REFERRER:** Please ensure that the name displayed here is the **CORRECT** name; any queries regarding the referral will be directed to this person.
- ↳ **Secretarial/admin staff will need to enter the name of the referring clinician.** Change the priority if required.
- ↳ **Mandatory** fields that are displayed blank, with no value, must be completed.
- ↳ **HOSPITAL name:** If unsure of site (hospital) go with main hospital for the sector – e.g. **Clyde is RAH; South is QEUH; North is GRI**; otherwise select the appropriate site/hospital for the referred to specialty.

■ **NOTE: The HOSPITAL location will auto-complete as per your TrakCare default location setting. This should be changed by you if this is NOT the correct hospital location to which you are referring the patient.**

- ↳ **SPECIALTY:** As GGC services continue to adopt the TrakCare **Internal Referral** processes, each service will provide local guidelines according to the **locality** and the **specialties** that come under that area – e.g. **R5-MSK is the code for MSK Physio** and should be used when referring to **MSK Physio** and **NOT R5**, which is for Physio. This specialty is also geographically-determined*

* Please refer to list of relevant specialties (appendix) at the back of this QRQ

- ↳ **VETTING COMMENTS** can be recorded in the **Vetting Comments** field; they will then appear on the Vetting List screen. **NOTE: This is NOT where you type your referral details.**

- f. Click **UPDATE** to proceed

A new screen will be displayed that allows the user to complete the 'internal referral letter' – i.e. reason for referral.

g. Complete accordingly

↳ Status will default to **Authorised**:

PA Person Banner 0.374277 (secs), 21726 (lines), 1803 (globals)

Status:

Dear Doctor

Please see this patient who has a recent history of SOB and chest pain.

Kind Regards
Shameem

Reason for referral

[Edit History](#)

h. Click **UPDATE**

■ **PLEASE NOTE:** If, when composing the referral letter (on the page shown above) you do **NOT** include sufficient clinical information, your referral will be rejected thus leading to delays in the patient receiving appropriate care.

The **WAITING LIST ENTRIES** screen is displayed.

↳ The new waiting list entry is listed with a **Status** of **INITIAL** and **NOT VETTED**.

Select	Status	UCPN	CHI	Surname	Forename	Age	Days on List	Guarantee Date	Specialty	Appointment Type	Named Consultant	Priority
<input type="checkbox"/>	Initial					84	0 (0)	22/12/2017	Cardiology	NEW		Not Vetted

● **NOTE:** The user will then have to sort by **Days on List** to see the related WL entry at top of the list (click ▲ to sort)

- An **Internal Referral** has been made.
- A copy of the letter can be seen via the **Internal Referral** icon



To view/read the Internal Referral ...

- Go to **EPISODE TREE** for patient
- Click on the **Clinical Record** icon for the episode in question
- The new **Internal Referral** will be located under the **QUESTIONNAIRE** tab

■ **NOTE:** It will **NOT** transfer to the patient's **Clinical Portal** record.

CHI: Name: Gender: Female DOB: Age: 84 Yrs Phone:

Person Banner 0.014954 (secs), 19329 (lines), 1783 (globals)

Clinical Assessment Presenting Complaint Vital Signs Alerts Allergies and Adverse Events Clinical Notes FloorPlan Notes Questionnaire Current Diagnosis

Patient History Procedures/Rx Laboratory Imaging Quick View Imaging Cardiology HAN Other Ord Medication Documents Emergency Care Summary Portal

▼ Questionnaire + New

Select	Questionnaire	Score	Questions And Answers	Date	Time	User	Create Date	Create Time	Cumulative
<input type="checkbox"/>	Internal Referrals	0		29/09/2017	09:48	Shameem Akhtar	29/09/2017	09:48	

MRAdm.ListEMRQuestionnaire 0.006966 (secs), 9945 (lines), 772 (globals)

Click on the INTERNAL REFERRALS hyperlink to view the letter content (please see next screenshot ...)

CHI: Name: Gender: Female DOB: Age: 84 Yrs Phone:

Person Banner 0.015706 (secs), 21726 (lines), 1800 (globals)

Status Reason for referral

Authorised

Dear Doctor

Please see this patient who has a recent history of sob and chest pain.

Kind Regards

Shameem

Update Print Apply Preview

Orthopaedics

GRI

When sending or onward referring an electronic referral to **Orthopaedics at GRI**, please make sure the Hospital is set at GRI and use the following sub-specialities:-

Short Code	Speciality
C8CH *	Trauma and Orthopaedics – Oncology *
C8G3	Trauma & Orthopaedic - Elbow
C8G4	Trauma & Orthopaedic - Hip
C8G5	Trauma & Orthopaedic - Knee
C8G9	Trauma & Orthopaedic - Shoulder
C8G7	Trauma & Orthopaedic - Wrist & Hand

*** THIS SHOULD ONLY BE USED FOR THE MSK ONCOLOGY SERVICE WITHIN ORTHOPAEDICS**

GGC

If you want to send a referral to the **Foot & Ankle** service within GGC, please set the Hospital to GGC and use the following sub-speciality:-

Short Code	Speciality
C8G1	Trauma & Orthopaedic - Ankle & Foot

WGH (West Glasgow Hospital / Yorkhill)

To send a referral to the **Spinal Service**, please set the Hospital to **WGH** and use the following sub-speciality:-

Short Code	Speciality
C8GA	Trauma & Orthopaedic - Spine

All other sub-specialities in WGH are as follows:-

Short Code	Speciality
C8G3	Trauma & Orthopaedic - Elbow
C8G4	Trauma & Orthopaedic - Hip
C8G5	Trauma & Orthopaedic - Knee
C8G9	Trauma & Orthopaedic - Shoulder
C8G7	Trauma & Orthopaedic - Wrist & Hand

QEUH

To send a referral to **Orthopaedics at QEUH**, please set the Hospital at QEUH and use the following sub-specialities:-

Short Code	Speciality
C8G3	Trauma & Orthopaedic - Elbow
C8G4	Trauma & Orthopaedic - Hip
C8G5	Trauma & Orthopaedic - Knee
C8G9	Trauma & Orthopaedic - Shoulder
C8G7	Trauma & Orthopaedic - Wrist & Hand

VIC

To send a referral to **Orthopaedics at VIC**, please set the Hospital at VIC and use the following sub-specialities:-

Short Code	Speciality
C8G3	Trauma & Orthopaedic - Elbow
C8G4	Trauma & Orthopaedic - Hip
C8G5	Trauma & Orthopaedic - Knee
C8G9	Trauma & Orthopaedic - Shoulder
C8G7	Trauma & Orthopaedic - Wrist & Hand

RAH

To send a referral to **Orthopaedics at RAH**, please set the Hospital at RAH and use the following sub-speciality:-

Short Code	Speciality
C8	Trauma and Orthopaedic Surgery

IRH

To send a referral to **Orthopaedics at IRH**, please set the Hospital at IRH and use the following sub-speciality:-

Short Code	Speciality
C8GC	Trauma & Orthopaedic - Lower Limb
C8GB	Trauma & Orthopaedic – Upper Limb

MSK Physiotherapy

To send an electronic referral to **MSK Physio**, use the following speciality:

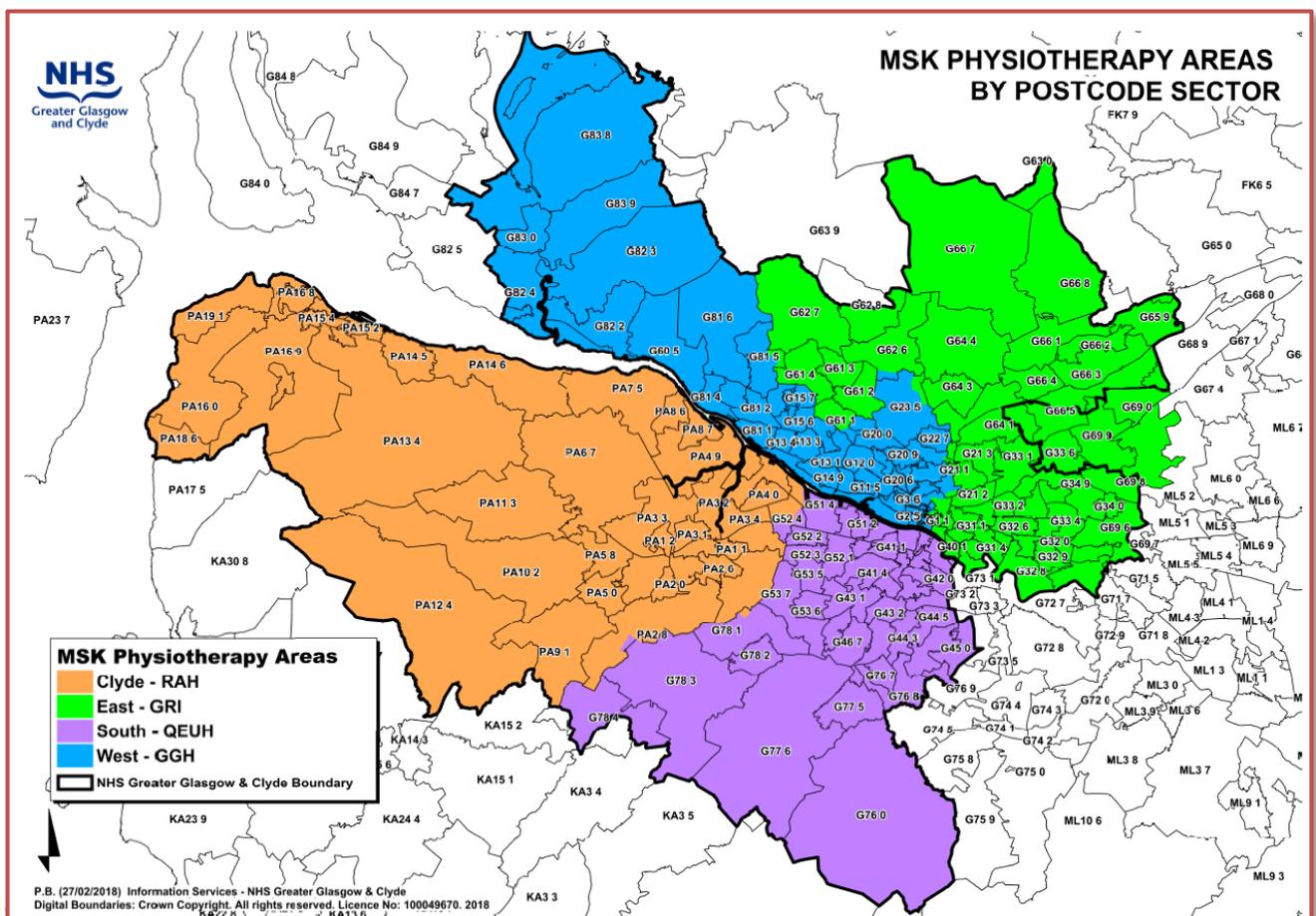
Short Code	Specialty
R5MSK	PHYSIO - MSK

Hospitals: (only select **ONE** of the **FOUR** listed)

Please make sure you select the correct hospital using the map (see next page) or postcodes as a guide or which site is the closest for the patient to attend for treatment based on the list below:-

■ **Please Note: Physio-MSK are only receiving from GRI – NOT Clyde hospitals.**

GRI	QEUH	GGH	RAH
<ul style="list-style-type: none"> Ballieston Health Centre Bridgeton Health Centre Easterhouse Health Centre GRI Kirkintilloch Health and Care Centre Lennoxtown Clinic Milngavie Clinic Parkhead Health Centre Shettleston Health Centre Springburn Health Centre Stobhill ACH 	<ul style="list-style-type: none"> Barrhead Health and Care Centre Castlemilk Health Centre Eastbank Health & Care Clinic Elderpark Clinic Gorbals Health Centre Govanhill Health Centre New Victoria Infirmary Pollok Health Centre QEUH 	<ul style="list-style-type: none"> Clydebank Health Centre Community Centre for Health, Partick Drumchapel Health Centre Dumbarton Health Centre Gartnavel General Maryhill Health & Care Centre Possilpark Health and Care Centre West ACH Woodside HC Vale of Leven Hospital 	<ul style="list-style-type: none"> Greenock Health Centre Inverclyde Royal Johnstone Health Centre Port Glasgow Health Centre Renfrew Health and Social Work Centre Royal Alexandra



Orthotics

To send an electronic referral to **Orthotics**, please make sure you select the correct Hospital: **GRI; GGH; RAH; IRH; VOL; NVH; STOB; QEUH** and use the following speciality:-

Short Code	Speciality
RF2	Orthotics

■ **NOTE: In pilot only the sites in bold are receiving referrals to Orthotics via Internal Referral**