

Standard Operating Procedure (SOP) Number:

SOP Title: Gastroenterology eReferral Triage Process

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SOP Statement

To provide guidance on how to triage referrals on eReferral (eRS) to the Gastroenterology Team, including medical and PPC colleagues.

Executive Summary

The purpose of this SOP is to provide an overview on how to triage referrals on the eReferral system (eRS) and actions to be taken by the clinician.

The main aim of clinical triage is to:

- review referrals,
- identify patients with urgent needs that may need an appointment to be scheduled without delay and,
- request diagnostic procedures that the patient will require.

1.0 Roles and Responsibilities:

Service Manager- to ensure the SOP is distributed to all members of the team and ensure it is reviewed and updated.

Consultant/ Specialty Doctor- to utilise the policy when clinically triaged eRS referrals and provide any feedback on the process which may result in improvements or changes. To update the diagnostic requests spreadsheet with any diagnostics required for patients.

Patient Pathway Coordinators- to ensure that any identified actions are completed. To update the diagnostic requests spreadsheet when diagnostics encounter is created, completed and ensure a letter to Patient/ GP is completed by the consultant.

2.0 Implementation and dissemination of document

This policy will be distributed to the teams prior to implementation for all current staff members. Additionally, it will be disseminated to all new team members to ensure they have access to and understand the policy and process.

The document will be available on the departments Microsoft Teams' channel to ensure all the team (including Information Governance) have access.

This document will be published on the Trust Intranet.

3.0 Processes and procedures

3.1 Important Note

When triaging for Referral Assessment Service please ensure when requesting a diagnostic, a letter is done to GP/ patient and the request is added to the spreadsheet and requested on eCare once the encounter is created. Follow steps 3.2.1 and 3.3.1.

If triaging a patient with an appointment already scheduled, no appointment should be cancelled if the appointment is in than less than 4 weeks' time, unless appropriate. Follow steps 3.2.2 and 3.3.2.

3.2 How to Review a Referral

3.2.1 Reviewing a Referral for a patient referred via RAS

1. Under Worklist Type drop down menu, select Referrals for Review.

Worklists	Directory of Services	Enquiries	Reports	Alerts	
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Worklist Type

2. Select GI and Liver from the Specialty field, choose Triage and then load results (it should look like the below).

Worklist Type Referrals for Review

Referrals for Review [Set as default worklist](#)

▼ **Filters** [Hide filters](#)

Service Show All Clinician Show All

Specialty GI and Liver (Medicine and Surgery) Location Show All

Referral type
 Triage Appointment Show All

[Reset all filters](#)

Load results

This will generate a list of patients.

- Filter the patient list by clicking on e-Referral Pathway Start to arrange the list by oldest referral which will appear at the top.

e-Referral Pathway Start ↑

- Click on the blue UBRN to review the referral.

UBRN **e-Referral Pathway Start**

- You can then open the attachments with clinical information and review the referral.
- Please make sure you check eCare for a recent appointment or if they are already under follow up for the same condition.
 - If they are for follow up please email the Gastro PPC inbox with a timeframe for booking

3.2.2 Reviewing a referral for a patient with an appointment booked

- Under Worklist Type drop down menu, select Referrals for Review.

Worklists	Directory of Services	Enquiries	Reports	Alerts	
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Worklist Type Referrals for Review

- Select GI and Liver from the Specialty field, choose Appointment and then load results (it should look like the below).

Worklist Type

Referrals for Review [Set as default worklist](#)

▼ **Filters** [Hide filters](#)

Service <input type="text" value="Show All"/>	Clinician <input type="text" value="Show All"/>
Specialty <input type="text" value="GI and Liver (Medicine and Surgery)"/>	Location <input type="text" value="Show All"/>

Referral type
 Triage Appointment Show All

[Reset all filters](#)

Load results

This will generate a list of patients.

- Filter the patient list by clicking on Appointment to arrange the list by appointment date with the soonest at the top.

Appointment ↑

- Click on the blue UBRN to review the referral.

UBRN e-Referral Pathway Start

- You can then open the attachments with clinical information and review the referral.
- Please make sure you check eCare for a recent appointment or if they are already under follow up for the same condition.
 - If they are for follow up please email the Gastro PPC inbox with a timeframe for booking

3.3 Actions Following Referral Review

3.3.1 Reviewing a referral for a patient referred via Referral Assessment Service

- Select Record Triage Outcome in the bottom right of the screen

Record Triage Outcome

- From the drop down Select Triage Outcome
 - Accept and Refer/Book Later- choose this option if you want to accept the referral into the service
 - Return to Referrer With Advice- choose this option to ask the GP to re-direct to a different service, if the patient is not appropriate for an appointment or there are tests required that are missing prior to appointment
- Select the Priority of the referral
 - 2 week wait- if selecting this option please email the PPCs to coordinate the appointment to be booked.

- b. Routine
- c. Urgent
- d. Enter any triage instructions:
 - a. Make sure to add the appropriate servicer: IBD, Hep, General Gastro.
 - b. Urgent, please include a timeframe for the appointment.
 - c. If the appointment can be telephone or F2F.
 - d. If the appointment should be with a specific clinician (please note this can impact a patients waiting time due to availability of appointments).
 - e. If a diagnostic is to be requested and what diagnostic this is
- e. Click Submit, Review Next

3.3.2 Reviewing a referral for a patient with an appointment already booked

- a. To add a clinical comment with the outcome of the triage click 'Add Clinical Information' in the bottom right of the screen. And then click OK.

Add Clinical Information

- b. To accept the referral click Accept, Review Next in the bottom right corner. This will generate the next referral.

Accept, Review Next

- c. To reject the referral, click Reject in the bottom right corner, and fill in a reason as to why the referral is being rejected.

Reject

- d. If the referral has been sent to the incorrect service, you can re-direct a referral. Click Request Admin to Rebook, and enter a comment stating which service the referral needs to be redirected to.

Request Admin to Rebook

This will generate next referral for you to review or you can click the next UBRN.

N.B Please dictate a letter where necessary if rejecting a referral or requesting diagnostics.

3.4 Triage Outcomes Summary

Triage Outcome	RAS	Appointment already booked	Action
Setting Priority	X	X	1. Select a priority when triaging. 2. If urgent, set a timeframe for the appointment. 1. If a 2 week wait see below action.
Upgrading to a 2 week wait	X	X	2. Email PPC gastroppc@mkuh.nhs.uk to organise the appointment to be booked.
Requesting a diagnostic	X	X	1. Add to the Diagnostic Spreadsheet. 2. Do a letter to Patient/ GP.
Return to referrer	X	X	1. Reject the referral and type a comment with information for the GP 2. Use this option if the service is inappropriate and the patient is referred via RAS
Re-direct a referral		X	1. Choose Rebook appointment 2. Add a comment with the service the patient should be rebooked to

3.5 Patient Pathway Coordinators Responsibilities

The PPCs play a vital role in supporting the coordination of the RAS service.

PPC responsibilities:

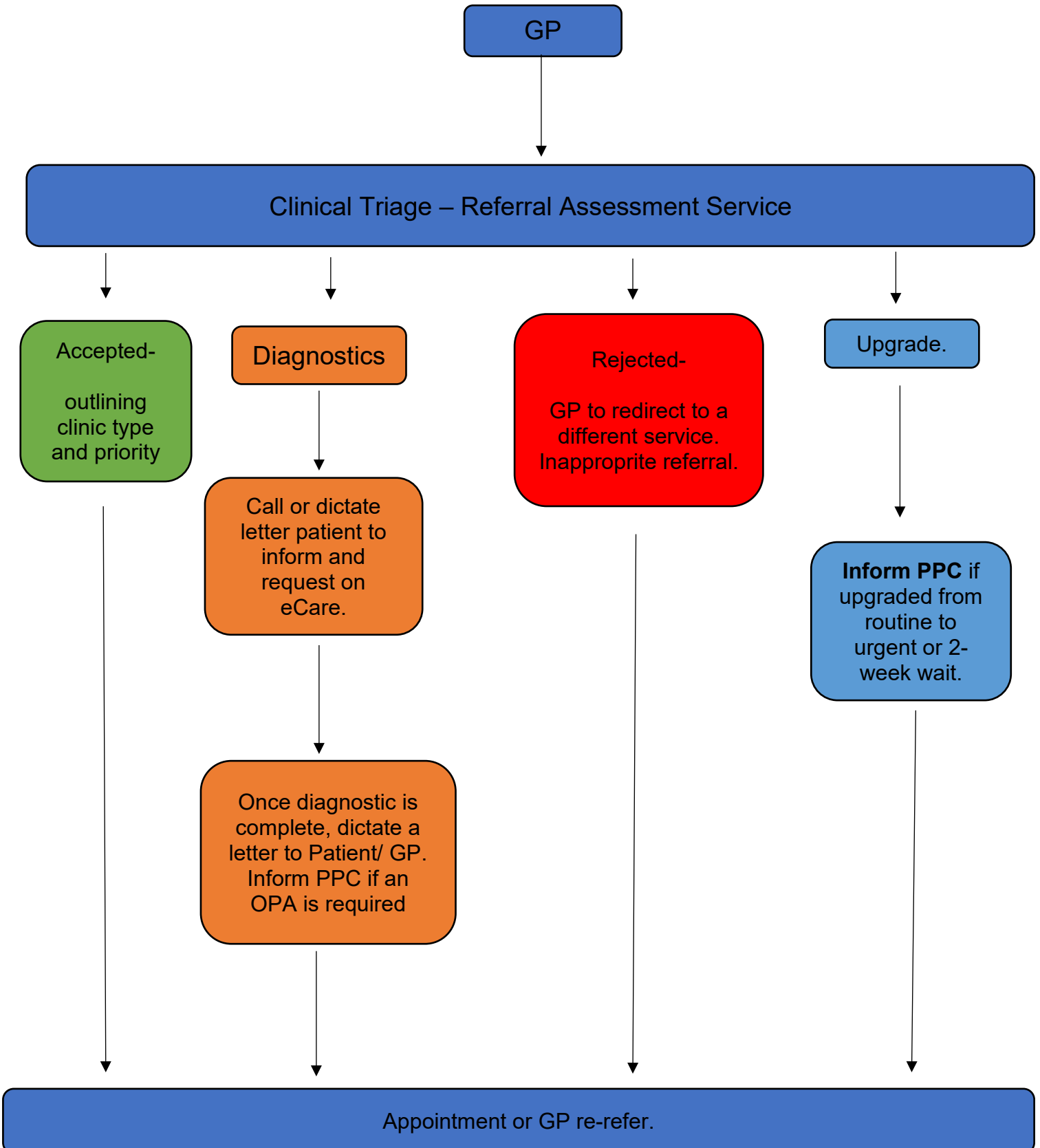
Activity	Sub-Activity	Frequency
Review the Diagnostics Request Spreadsheet (DRS) (Appendix X)	Create an encounter on eCare and update the DRS and contact the requesting clinician	Daily
	Update DRS if any diagnostics are back and notify requesting doctor	Weekly
	Update DRS if a letter is completed for Patient/ GP	Weekly
Review Appointments for Booking	Email Urgent 2ww Bookings urgent.2wwbookings@mkuh.nhs.uk if there are any 2 week wait upgrades (the doctors should also email Gastro PPC)	Daily
	Book any patients requiring an appointment in less than 3 weeks	Three times a week

	that are not a 2 week wait. Escalate any capacity issues	
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3.6 Central Booking Office Responsibilities

Activity	Sub-Activity	Frequency
Review Appointments for Booking	Book in order of Urgency (prioritising urgent ahead of routine).	Daily
	Once urgent referrals are booked, book in order of referral date.	Weekly
	Re-direct appointments to the appropriate service as directed.	Weekly
Queries	For any capacity or general queries email gastroppc@mkuh.nhs.uk or the Assistant Service Manager for Specialty Medicine	

3.7 Referral Flow Diagram



4.0 Statement of evidence/references

Statement of evidence:

References: N/A

External weblinks: N/A

5.0 Governance

5.1 Document review history

Version number	Review date	Reviewed by	Changes made

This document is uncontrolled once printed. Please check on the Trust's Intranet site for the most up to date version.
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5.2 Consultation History

Include staff in consultation who will be required to ensure the SOP is embedded. This table should be completed in full even if no comments are received

Stakeholders Name/Board	Area of Expertise	Date Sent	Date Received	Comments	Endorsed Yes/No
	GI consultant	12/06/2023			
	GI consultant	12/06/2023			
	GI consultant	12/06/2023			