

Referral services Service Guide

Introduction

The transfer of patient data across any interface has always been problematic e.g. passing patient information from secondary to primary care following hospital discharge when referring patients to pharmacies for post discharge Medicines Use Review (MUR), New Medicines service (NMS) or other support services.

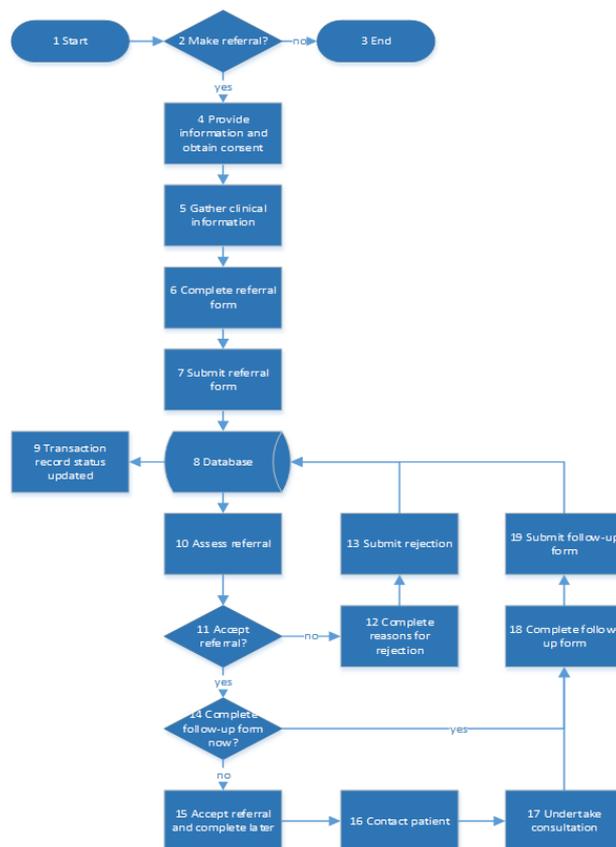
Functionality within PharmOutcomes allows the secure transfer of patient information from one centre to another; in this case this is from hospital to the community pharmacy that the patient usually gets their prescriptions from. Work is currently underway to automate this process from the hospital side but initially this will be done manually.

All hospital and community pharmacies in Oxfordshire, Berkshire and Buckinghamshire are currently licenced to use the web-based 'Transfer of Care' service provided by PharmOutcomes. This service allows hospital pharmacy staff to provide information and refer a patient on discharge to the patient's nominated community pharmacy so that further support with medicines can be provided in the community.

Preparatory work

Before using the Transfer of Care service the following steps must be taken:

- Identify a suitable patient for whom the referral will be made;
- Ensure that the patient is informed about the service (information sheet is available);
- Ensure that the patient has given their consent to use the service, and in particular for information on their medicines to be transferred to their nominated community pharmacy and for the community pharmacist to contact them to make an appointment for a consultation. The consent will also extend to allow the use of the information held to undertake an evaluation of the service; and
- Take the name and address of the patient's normal community pharmacy.



Getting Started

Referral services are built in two parts, the first part is populated at the hospital. This service records patient information and any relevant recommendations to be passed on to the next provider in the care pathway

To access the service, go to <https://pharmoutcomes.org> and enter your username and password. If you have not been given a username and password, please contact your departmental head.



Once successfully logged in, this will take you to the inbox of the hospital site on PharmOutcomes. Select the "Services" tab on the menu bar below the main title to go to the Services page.



The services available will be the Transfer of Care (ToC) Hospital Referral service. It will appear in two places – both as the most recently provided and in the main service – and to refer to community pharmacy you can click either of these to go to the patient screen. On the right hand side is a history of previous referrals – under the orange heading is the last five entered; under the blue heading is the last twenty in order of date of referral. A link at the bottom allows all previous referrals to be seen. Click either of the Transfer of Care links.

PharmOutcomes - Live System
Exit Logged in as: Pinnacle Support Team from Test Hospital Oxford

PharmOutcomes® Delivering Evidence

Home Services Reports Admin Gallery Help

Provide Services Recent Provisions Search for Identifier:

• Click here to show explanations of the Provision Status column

Most Recently Provided
Transfer of Care (ToC)
Hospital Referral to Community

Hospital referral
Transfer of Care (ToC)
Hospital Referral to Community

Service Centre
Contact your local commissioners if you cannot see services you expect to see.

Last Entries	Service (stage)	Identifiers	User	Status
2015-04-30	Transfer of Care (ToC) - Hospital Referral to Community	BP	Oxford Test Hospital	Cancelled Click to reinstate
2015-04-29	Transfer of Care (ToC) - Hospital Referral to Community	CG	Oxford Test Hospital	Active Click to Cancel
2015-04-28	Transfer of Care (ToC) - Hospital Referral to Community	JB	Oxford Test Hospital	Active Click to Cancel
2015-04-28	Transfer of Care (ToC) - Hospital Referral to Community	GC	Oxford Test Hospital	Active Click to Cancel
2015-04-24	Transfer of Care (ToC) - Hospital Referral to Community	SJ	Oxford Test Hospital	Active Click to Cancel

Click the service name to make a new referral

Date Order	Service (stage)	Identifiers	User	Status
2015-04-30	Transfer of Care (ToC) - Hospital Referral to Community	BP	Oxford Test Hospital	Cancelled Click to reinstate
2015-04-30	Transfer of Care (ToC) - Hospital Referral to Community	CG	Oxford Test Hospital	Active Click to Cancel
2015-04-29	Transfer of Care (ToC) - Hospital Referral to Community	JB	Oxford Test Hospital	Active Click to Cancel
2015-04-28	Transfer of Care (ToC) - Hospital Referral to Community	GC	Oxford Test Hospital	Active Click to Cancel
2015-04-24	Transfer of Care (ToC) - Hospital Referral to Community	SJ	Oxford Test Hospital	Active Click to Cancel

Click a previous referral to review the entry

Once you've clicked the link, you will be taken to a new screen to enter the new Referral.

Making a Referral

When in the referral, you should enter the information as required – fields with a bold question are mandatory. However, if the NHS Number is not available you can enter Unknown or Not Issued as required. To help staff understand the purpose of each piece of information, the table below explains what is required to complete each field in the referral form:

Field name	Required	Completion instructions
Provision date	Yes	Auto-populated with today's date
Patient name	Yes	Enter the patient's first name and surname
Date of Birth	Yes	Use the calendar function to select the patient's date of birth
Gender	Yes	Click in the appropriate space
Ethnicity	Yes	Select from the drop down menu
Postcode	Yes	Enter the patient's postcode, and select the address from the drop down list showing the results of the search
Address	Yes	See above
NHS number	Yes	If known, enter the ten digit number. If not known, enter 'unknown' or if the patient has never been registered with a GP, then enter 'not issued'.
Patient Contact Details	Yes	Free text box for the patient's telephone number, email address and any other information

Name of pharmacy	Yes	Enter the first four characters of the name of the pharmacy (or street, or town etc), and select the pharmacy from the drop down list showing the results of the search.
Consent given	Yes	Complete the 'yes' box. NB If the patient hasn't given consent you should not proceed with the referral
GP practice	Yes	Enter the first four characters of the name of the practice (or street, or town etc) and select the practice from the drop down list showing the results of the search
Consultant	No	Free text the name of hospital consultant treating the patient
Allergies	No	Free text a list known allergies for the patient

The start of the data entry screen are shown below.

The screenshot shows a data entry form with the following fields and sections:

- Provision Date:** 25-May-2015
- Patient Name:** [Text input field]
- Primary identification:** [Text input field]
- Date of Birth:** [Text input field] (Enter as dd-mmm-yyyy (eg 23-Feb-1989))
- Gender:** Male Female Trans
- Ethnicity:** Select an option... [Dropdown menu]
- Postcode:** [Text input field] **Search** [Button]
- Address:** [Text input field]
- NHS Number:** [Text input field] (If neither the client nor the provider know the NHS Number, you can enter "Unknown". If the client has never been issued with an NHS Number, you can enter "Not Issued".)
- Patient Contact Details:** [Text input field]
- Name of pharmacy:** [Text input field] (Select pharmacy for onward referral)
- Referral Status:** [Text box containing instructions: "If this referral was already sent, and rejected by the provider selected above, the details they entered when they rejected will appear here"]
- Has the patient given informed consent?:** Yes No
- GP Practice name & address:** [Text input field]

A yellow callout box on the right side of the form contains the text: "Please advise the patient that the community pharmacy will call to arrange an appointment within 7 working days".

A blue callout box with an arrow pointing to the "Name of pharmacy" field contains the text: "Relevant information is recorded as part 1 of services at the hospital".

The "name of pharmacy" question will tell the system where to send the referral. All the pharmacies in the country are listed but only those that can accept a referral will be clickable, the others will be marked "Not Accredited". The patient will provide the information needed to find the pharmacy – for example, a street name, a pharmacy name, a village name. Simply typing this into the box will bring up a list of matching pharmacies.

Next, further down the screen enter the clinical parts of the service that will provide the community pharmacy with the information they need to follow up your referral. The system is secure and meets the NHS Information Governance Toolkit requirements to Level 3 so you can be assured that the information is kept safe. Only when the community pharmacy accepts the referral will the information be transferred to their records.

The screenshot shows a form with the following fields:

- Consultant: [Text box]
- Allergies: [Text box]
- Medicines on discharge: [Text box]
- Reasons for changes: [Text box]
- Stopped medicines: [Text box]

Below the 'Reasons for changes' field, there is a note: "Include dose and formulation changes". Below the 'Stopped medicines' field, there is a note: "Include rationale and recommendations".

A blue callout box with an arrow pointing to the 'Medicines on discharge' and 'Reasons for changes' fields contains the text: "Clinical Information – this has been kept as brief as possible to help staff".

Field name	Required	Completion instructions
Medicines on discharge,	No	Not in use yet (but free text is accepted)
Reasons for changes	No	Not in use yet (but free text is accepted)
Stopped medicines	No	Not in use yet (but free text is accepted)
New Medicine	No	Free text the name of any new medicines started in hospital
Additional information /reason for referral	No	Free text box to provide further information for the community pharmacist
Completed by	Yes	The name of the person making the referral (remembered by the system)
Job Title	Yes	The job title of the person making the referral (remembered by the system)
Contact Number	Yes	A contact number (and bleep if appropriate) of the person making the referral (remembered by the system)

Important: The fields requiring information of medicines are intended for when electronic interfaces are implemented and this data will be auto-populated from hospital prescribing or electronic discharge letter systems. In the meantime, it is important that patients are given a copy of their discharge summary which they should take to the community pharmacy when their consultation is held. However, they can be used for free text entries that staff deem it important for the community pharmacist to be aware of.

As part of the referral, the hospital can suggest to the community pharmacy an intervention required as part of their contractual framework and a particular new medicine to focus on.

- Referral to community pharmacy

Recommendations

Medicine Use Review

New Medicine Service

Tick ALL that apply

New medicine

State new medicine if referring for NMS

MUR for people at risk of problems with medicines after discharge because of social, physical or medicine factors. NMS eligible for all started medicines in the following groups: - Anticoagulants / Antiplatelets - Type 2 diabetes - Hypertension - COPD / Asthma

- Additional Information / reason for referral

Notes

Please provide any further information that may be relevant

- Completed by

Name

Job title

Contact number

Full external telephone number

Finally, there is the opportunity to provide any other comments to the community pharmacy together with your contact details if any significant findings occur on follow-up – this will remember previous entries to save retyping repeatedly, simply start typing and the system will bring up previously entered answers.

Press the orange **Save** button and the referral will be sent.

The fields for the main referral and clinical information are:

If the referral has not been completed correctly, the user will be returned to the top of the form, and a red box will indicate that errors have been encountered, and must be corrected before the referral can be saved. The fields that have not been completed correctly are highlighted and the reason for the error is given.

Home **Services** Reports Claims Admin Gallery Help

 We encountered errors in the information you submitted. Please check the fields marked below and try again.
[Click here to go to the first error](#)

Service Support **Transfer of Care (ToC) - Hospital Referral to Community**

Provision Date

 **You appear to have only entered one name or perhaps some initials.**

The client name entered here is protected by the system, it is only visible to your provider.

Commissioners and viewers will only see anonymised (initialised) versions of it, so it is always safe to enter a full name.

It will also not allow the entry of initials.

Please advise the patient that the community pharmacy will call to arrange an appointment within 3 working days

Patient Name

The user must correct all errors and then press the orange save button again. When the form is saved, and all fields have been completed correctly, the user is taken back to the Services page, and green box indicates that the referral has been successfully saved.

- Transfer of Care (ToC) - Hospital Referral to Community provision successfully entered and saved
- The following system generated provision report letters are available
 - Basic Provision Record

What Happens Next?

An email is automatically sent by the system to the pharmacy's normal email address, if available, without any patient identification telling them that they have a referral and to check the system. When they log in, there will be a notification at the top of their screen allowing them to review the information provided and follow up with the patient. If they cannot accept the referral, for whatever reason, they must provide the reason before rejecting and a similar list appears at the top of the hospital service screen. These can be cancelled when they arrive as the project is only referring patients to their normal pharmacy.

The screenshot shows the 'Recent Provisions' section of the PharmOutcomes interface. It features a search bar and a table of provisions. A blue callout box points to the 'Status' column of the table.

Outstanding	Service (stage)	Identifiers	User	Status
2014-06-11	Hospital referral provider	MM	Ben Johnson	Pending, awaiting follow up action
2014-05-07	Chris and Jades 2nd service	DD	Ben Johnson	Pending, awaiting action

Provisions in date order
[<] Click to show Provisions ordered by most recently entered

Date Order	Service (stage)	Identifiers	User	Status
2014-06-11	Hospital referral provider	MM	Ben Johnson	Pending, awaiting completion
2014-06-	Supervised Consumption -	KN	Kevin	Active

Callout text: A notification appears in the provider screen of the onward provider. This appears above their service history

On the History Screen, there are three status types that you will see:

Status	Reason
Pending, awaiting completion	Either: <ol style="list-style-type: none"> 1. The Community Pharmacy has not yet accepted or rejected the referral; or 2. The Community Pharmacy has rejected the referral and it is in the list at the top of the screen awaiting the hospital cancelling the referral
Active	The Community Pharmacy has accepted the referral and completed the action with the patient. "Active" describes the record, rather than the referral status.
Cancelled	The Community Pharmacy has rejected the referral and the hospital has subsequently cancelled the referral.

The pilot project team have access to referral rates, rejection rates and outcomes but with all patient identifiable information redacted; they will provide both community pharmacy and hospital with updates on project progress.

Where to get Help

If the system is not behaving as you'd expect it to, there is help available on the Help tab. Here you can request a password reset or send a message to the helpdesk – they respond within the hour, ordinarily – much quicker.

If you have any thoughts on the referral service design, then this can be fed into the Project Team at the AHSN through your Departmental Head.