How to refer to the Optometrist Triage Service

This guide has been developed specifically to assist clinical and non-clinical staff in referring to the Optometrist Triage Service.

The guide assumes referrers have some prior experience of using e-RS, and thus does not go into detail where the process is the same as making a referral to any other service on e-RS.

Blue boxes outline the actions that need to be undertaken at each stage	Red boxes highlight the buttons you need to click at each stage

Step 1: Initiating an e-RS referral from EMIS Web

Within EMIS Web, ensure the correct patient is selected that you wish to make a referral for. You can then generate an e-RS referral either:

    a) Within a consultation (preferred method)

- Click **Referral**
- Hover over **NHS e-Referral**
- Select the appropriate priority (i.e. **Routine**)

    b) Within a patient's profile

- Click **Add** (drop down arrow)
- Click **Referral**
- Hover over **NHS e-Referral**
- Select the appropriate priority (i.e. **Routine**)

Please note, if a patient requires a 2 Week Rule referral, this should NOT be made via the Optometrist Triage Service. The referrer should refer the patient directly to the patient's chosen hospital. Patients with significant pain, a sudden loss of vision in one or both eyes or a penetrating injury should go directly to the eye casualty at St Thomas' Hospital or their nearest A&E.

Step 2: Searching for the Optometrist Triage Service on e-RS

Check that the right **Priority** is selected (i.e. **Routine**)

Select **Ophthalmology** from the **Specialty** drop down box

Select the appropriate **Clinic Type**

Click **Search Primary Care**

The Optometrist Triage Service will appear on the next page:

- Click **Send for Triage**

Note: if you clicked on **Search all** on the previous page, the Optometrist Triage Service will appear on this page, however, you may have to scroll down the page to find the service. The service will be identifiable by the **Send for Triage** button in the **Select** column.

Review Referral Criteria

Please check that the following referral criteria meet the requirements of your patient. If not de-select the service.

Select	Service Name	Referrer Alert	Exclusions	Conditions Treated	Suggested Investigation
☑	Ophthalmology – Optometrist Triage Lewisham – T289		Patients with significant pain, a sudden loss of vision in one or both eyes, chemical burns or a penetrating injury should go directly to the Eye Casualty department at St Thomas' Hospital or your nearest A&E.	http://www.lslloc.org/index.asp?id=75&page=151	http://www.lslloc.org/index.asp?id=75&page=151

Cancel   Back with selected services   Continue with selected services

- Click **Continue with selected services**

Check Patient Details

Please ensure that the patient's details are correct. If they are not up to date, this may result in a delay to care. The patient needs to be aware that setting the Consent to Call Back to 'No' will prevent them from being contacted by telephone. If the patient's details are correct, click 'OK' to continue. If not, click 'Update Person'.

Patient Name: XX SCM TEST PATIENT, Scm (Mr)

Address:

Consent to Call Back: Unknown

Telephone

Email

Telephone

Update Person   OK

The service may need to contact the patient to arrange an hospital appointment (if appropriate) and so it is important that the Consent to Call Back the patient has been recorded. To do this:

- Click **Update Person**
- At the bottom left of the screen, the Consent Call back Centre option should be recorded as **Expressed Consent**
- Click **OK** to proceed

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e-Referral Service   Patient:

Triage Request Details –

Check These Details Before You Submit

UBRN	
Clinical Term	-
Specialty	Ophthalmology
Clinic Type	Not Otherwise Specified
Priority	Routine
Service Name	Ophthalmology – Optometrist Triage Bromley – T289
Location	PRIMARY OPHTHALMIC SOLUTIONS (BECKENHAM)

Back   Submit

- Click **Submit**

The following confirmation screen will appear:

Triage Request Details

✅ **The triage request has been successfully submitted**

The patient has not yet defined a Consent to Call Back status. If the patient wants to define a status, update it in Update Person.

UBRN Created Date	Fri 09-Mar-2018 14:40
UBRN	
Clinical Term	-
Specialty	**Ophthalmology**
Clinic Type	**Not Otherwise Specified**
Priority	**Routine**
Content Sensitive	**No**
Service Name	**Ophthalmology – Optometrist Triage Bromley – T289**
Location	**PRIMARY OPHTHALMIC SOLUTIONS (BECKENHAM)**

ℹ️ Clinical referral information (e.g. Referral Letter) must be added for the triage to take place.

[Update Person] [Add Additional Requirements] [Add Referral Letter] [Close]

User\Team   [Retry] [Defer] [Please select an action: ▼] [OK]

You still need to attach the clinical referral information - the triage service will **not** be able to see the referral until the clinical referral information is attached**.**

To attach the clinical referral information (e.g. referral letter, test results) either:

- Click **Add Referral Letter** (please note, you cannot access referral forms on EMIS Web via this option)

Or

- Click **Please select an action** and select **I have selected a service**
- Click **OK**
- Follow the normal process for attaching clinical referral information to a referral.