



North of England
Commissioning Support

Partners in improving local health

NECS Clinical Systems Specialist Team

SystemOne - Creating and Amending a New Referral Guide



Author: NECS Clinical Systems Specialists Team



Partners in improving local health



North of England
Commissioning Support

Table of Contents

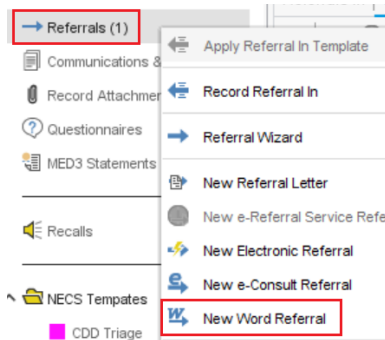
Contents

Creating a Referral Letter.....	3
Amending a Referral	5
Creating a Copy of a Referral	6
Completing a Referral Form with Tick Boxes	7

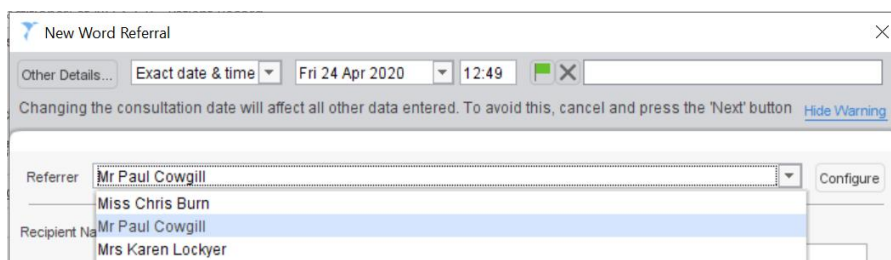
Partners in improving local health

Creating a Referral Letter

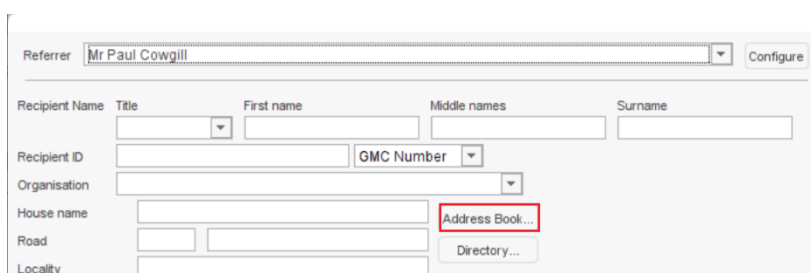
1. Search for and Retrieve a Patient Record
2. Right click on **Referrals** in the clinical tree and select **New Word Referral**



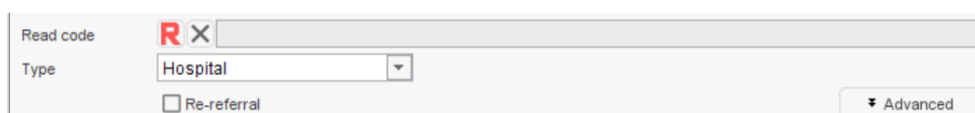
3. Select a **Referrer** from the drop down menu



4. Click **Address Book** to select a recipient

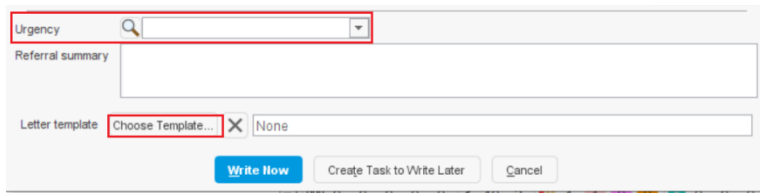


5. Ensure a referral read code is selected, to select a code click the **Red R**

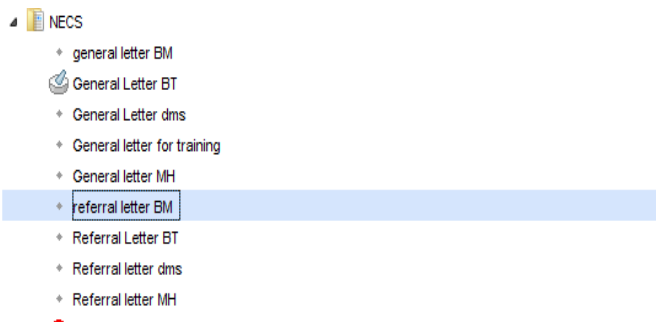


6. Select an **Urgency** (if required)
7. Click **Choose Template** to select a letter template

Partners in improving local health

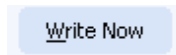


8. Highlight the relevant template

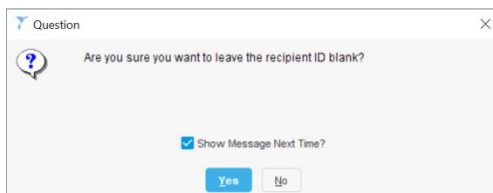


9. Click **Ok**

10. Click **Write Now**



11. You will be asked a question about not recording a **recipient ID**, click **Yes** as you do not need to add an ID

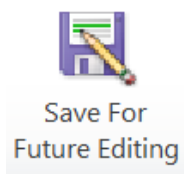


The referral will now display with the patient's details merged

12. Make amendments to the template as required

13. Type the referral letter as required

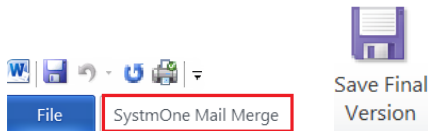
14. If the letter needs to be checked and possibly amended at a later stage, then **you must select Save for Future Editing**



However, if you are happy that the letter is the final version do the following:

15. This can be printed if necessary

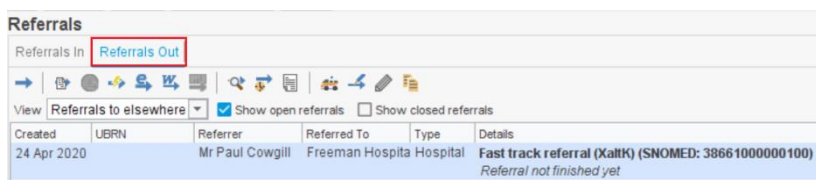
16. Click back into the **SystemOne Mail Merge** ribbon and click **Save Final Version**



17. This can now be attached to an e-referral or emailed

18. Click **Yes** to confirm

19. The Referral will now be saved into the record within the **Referral Node (Referrals Out)** on the Clinical tree



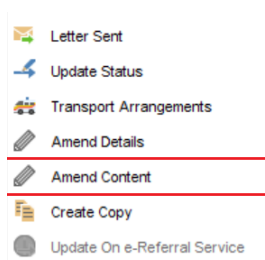
20. **Save** the record when complete



Amending a Referral

1. From the **Referral Node** within the Clinical Tree, **Right click** on the referral that you wish to amend

2. Select **Amend Content**



3. Make changes to the letter as required

4. Click **Save Final Version**

Partners in improving local health

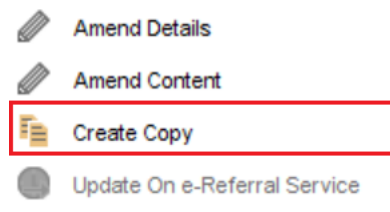
- Click **Yes** to confirm this is the final version

Note: Once Save final version is selected and confirmed you cannot amend that referral in the future.

Creating a Copy of a Referral

If you need to make an amendment but have selected Save Final Version, you will need to copy the original referral and create a new one to replace it and make your amendments. The original must then be marked in error and removed from the patient record.

- Right click on the Referral you want to copy and select **Create Copy**



- Select **Copy Letter**

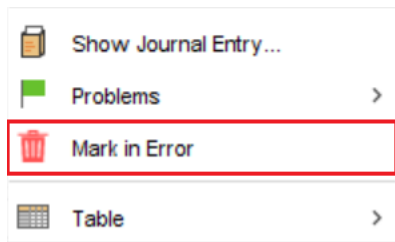


- Click **Write Now**
- Make the required changes to your referral letter
- Click **Save final version** or **Save for future editing**
- Return to the referrals node in the clinical tree

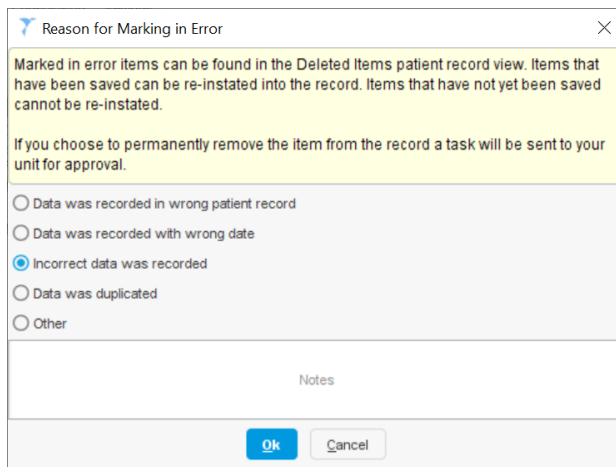
Referrals					
Referrals In Referrals Out					
Created	UBRN	Referrer	Referred To	Type	Details
24 Apr 2020		Mr Adrian Plank	Freeman Hospita Hospital		Referred by drug non-statutory service (XaL13) (SNOMED: 200791000000104) Referral not finished yet
24 Apr 2020		Mr Adrian Plank	Freeman Hospita Hospital		Referred by drug non-statutory service (XaL13) (SNOMED: 200791000000104) Referral not finished yet

- Right click on the original referral
- Select **Mark in Error**

Partners in improving local health



9. Confirm the reason for the error by selecting **Incorrect Data was recorded**



10. Click **OK**
11. **Save** the patient record



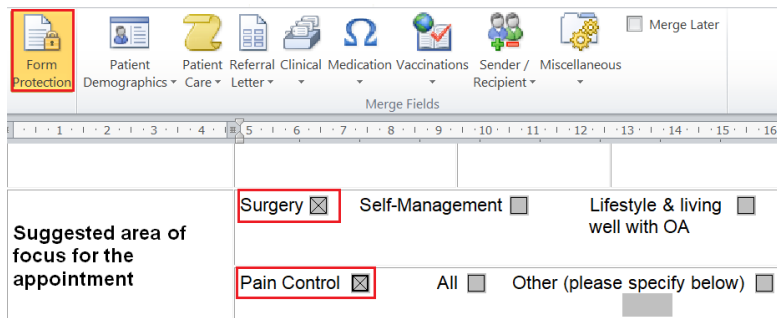
Completing a Referral Form with Tick Boxes

1. Create your Referral by following the same process as before, but choose the relevant form
2. Click **Write now**
3. Fill in the text areas as normal

- To tick the required boxes on the form, click the **Form Protection Button** on the ribbon toolbar



- Once selected, you will notice that the button is highlighted and you will then be able to click on the required boxes. This will add the x as required.



The screenshot shows a software ribbon with various icons. The 'Form Protection' icon is highlighted with a red box. Below the ribbon, a form is displayed with several checkboxes. The 'Surgery' and 'Pain Control' checkboxes are highlighted with red boxes and have an 'x' in them, indicating they are selected. Other checkboxes include 'Self-Management', 'Lifestyle & living well with OA', 'All', and 'Other (please specify below)'.

- To save the form, you will need to select the **Form Protection Button** again which will allow you to **Save Final Version** or **Save for Future Editing**

