Managing Advice and Guidance Requests

A tool to support referral management

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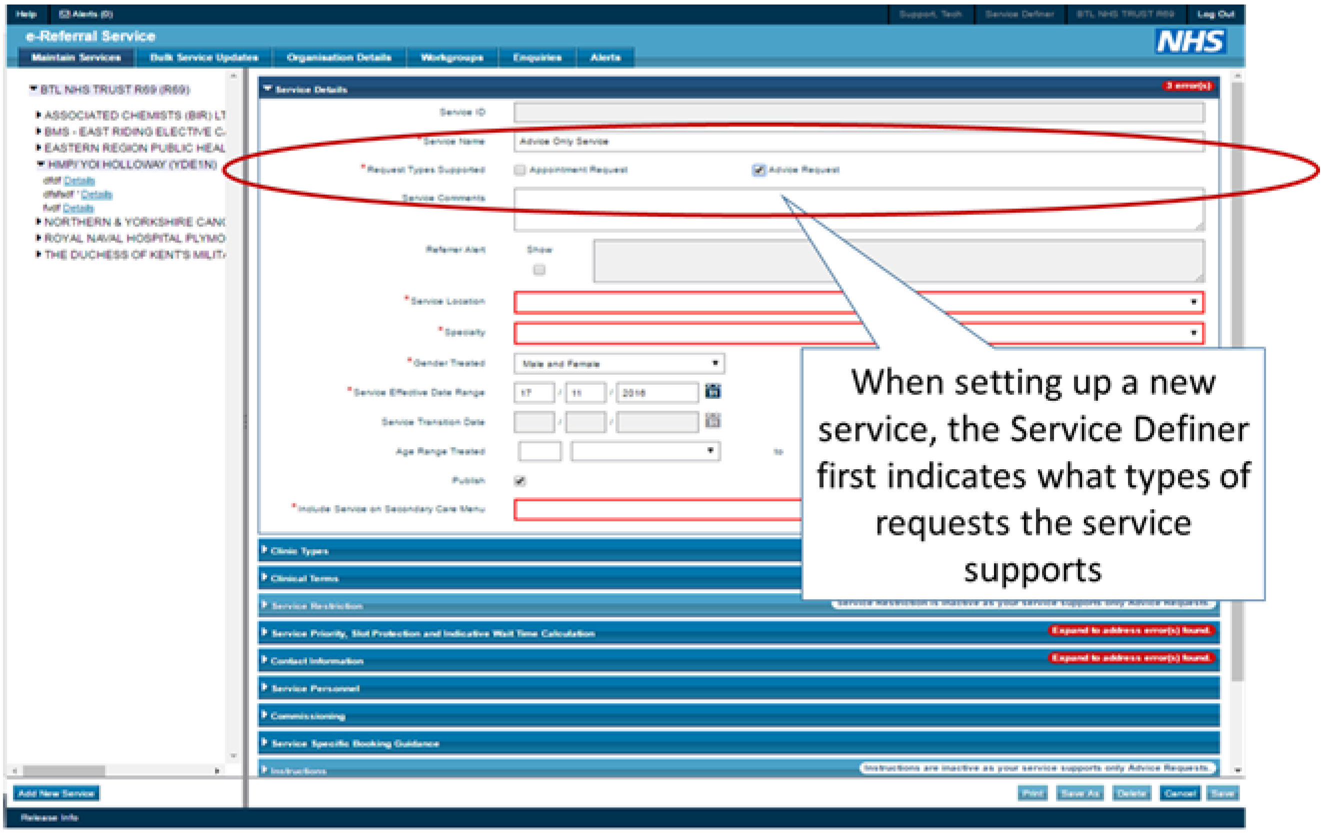
Contents

Setting up an Advice and Guidance Service.

An Advice and Guidance service is set up on the NHS e-Referral Service in the same way as any other service. Within the 'Request Types Supported' section of Service Details the Service Definer must select the 'Advice Request' check box.



Providers can decide whether to enable a service to only receive advice requests or whether to allow advice requests alongside the ability for appointment requests to be made. Further information on creating services is available on the NHS e-Referral Service website.

Requesting Clinicians

How to Request Advice and Guidance

1. Search for and select your patient, then
2. Click on the refer / advice button on the service search page. You are now at the Search screen.
3. Select 'Advice' from the Request Type drop down box.
4. Use the service search options to search for clinically appropriate services
5. Click on either the "Search Primary Care" or "Search All" buttons to return the services that meet the criteria used.

   Those services meeting your selection criteria and that have agreed to respond to Advice and Guidance requests are displayed (ie. the list will not show those services that have not agreed to respond to Advice and Guidance requests).
6. Select a single service by clicking the radio button in front of that service

7. Click the Request button at the bottom of the Service Results screen.
8. Type your question to the advisor in the yellow box. This is the only mandatory entry. It is possible to add attachments to the Advice and Guidance request by clicking the Add Attachment button. This works in exactly the same way as adding an attachment to an Appointment Request.
9. Press the Submit button

NOTE: Advice and Guidance requests can be initiated from within GP clinical systems. Clinical information, to support and Advice Request can also be sent from integrated GP clinical systems as well as directly via the e-RS website

For integrated clinical information uploaded to e-RS, e-RS limits the total, combined size of all attachments to 50Mb. Some GP Clinical System suppliers may set individual file-size limit below this

For an Advice and Guidance which is subsequently converted to a Referral Request, you must ensure all relevant clinical information is attached to support the referral.

How to View Advice and Guidance Responses

1. On your worklist screen, click on Advice and Guidance Reponses from the worklist filter.
2. Click the UBRN of the patient for whom you want to review a response.
3. Click Actions and select View Advice Request.

The service will write back to you in the “Advice Response” section and may, optionally, add additional attachments for you to view.

4. To view an attachment click on the file name in blue.
5. When you have finished reviewing the response click Close.

You can also print the advice detail with the print button. Note that this prints the advice request and response.

NOTE: The UBRN will remain in your Advice and Guidance Responses worklist for 180 days or until you remove it from your worklist.

How to Convert an Advice and Guidance Response into a Booking

1. From your worklist screen, open the Advice and Guidance Reponses worklist.
2. Click the UBRN of the response you wish to review and progress.
3. Click the Actions button and select Update Advice Request.
4. This now takes you to the Search screen where you can select more services if you wish, then click on Request or return to service selection to change the service.
5. If you are happy with the service then you can look for an appointment with the Appointment Search button or generate an appointment request.
6. Complete the appointment request process or booking process.

How to Remove an Advice and Guidance Response from your Worklist

1. From your worklist screen, open the Advice and Guidance Reponses worklist
2. Click the UBRN of the response you wish to remove from your worklist.
3. Click Actions and select Close Advice Request.You now see a summary of your request and the response.
4. Click Close Advice Request to remove it from your worklist.

Responding Clinicians

How to Open and Respond to Advice and Guidance Requests

1. Select the worklist Advice and Guidance Requests from the worklist filter.
2. Click on the UBRN of the request you wish to deal with. The details of the request will be displayed. The referrer may have added some files to the request. These can be seen at the top of the screen. Each file attachment is in blue.
3. Click the blue file name to view the attachment (this is the same as a referral letter).
4. Type your response into the Advice Response Comments box. It is possible for you to attach files in the response back to the referrer. To add an attachment to an advice response:
    i. Click Add Attachment.
    ii. From the dialog box select the file you wish to attach.
    iii. Click Open. The file you have added is now listed, You can remove the file by clicking the red X.
    iv. Repeat the process to add additional files.
    v. You are able to add a file description to the file. To do this simply click the text “Click here to add a file description” - you may add up to 200 characters for the description. This text will be displayed to any user viewing the attachment.
    vi. When finished click Submit.
5. You now have the option to print off your Advice and Guidance request if you wish by clicking Print then selecting your printer from your print box.
6. Click Close. You are then returned to the home page.