**Managed Referral Guidance**

Managed referrals enable you to send referrals electronically between primary care and community care organisations. You can use managed referrals for EMIS Web to EMIS Web referrals, from GP practices to extended healthcare providers (EHPs). Managed referrals extend the current paper referral process, which uses letters or faxes for standard referrals.

To use Managed Referrals in EMIS Web, the following conditions *must* apply:

* To activate Managed Referrals, you must have RBAC activity B0062 Local System Administration in your role profile.
* In order to send Managed Referrals, you will need RBAC activity B8016 Perform Management Restricted Administration in your profile
* Activate Managed Referrals in EMAS Manager.

**How to create a Managed Referral**

On the Referrals tab of the Care Record, click **Add** then select **Standard Outbound Referral**



Fill in the Outbound Referral form

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|  | Referral Source ***Your Surgery Name (for***  ***example Heaton Moor MC)***Referral Target search for ***SNFT Podiatry***Clinical Term search for ***8H7X / Refer to Pod***Urgency select ***Routine or Urgent***Referral Mode must be ***Managed***Purpose ***Assessment***Referral Letter ***Create Now***Click OK |
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*\* If the referral target has not been set up to allow external referrals, it is impossible to select Managed for Referral Mode*.

Select the document template - **NEW\_PODIATRY\_REFERRAL\_FORM\_V6\_May\_19**. Click OK

Select any extra attachments you wish to include with the referral letter



Ensure Reason for referral section on the referral form is completed.



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| Click **File** then **Save and Send** |   |

A warning appears – “*This will complete the task allowing no further actions. Do you want to continue?*” Click Yes

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| **To check the referral** - check right-hand side of Referrals tab (you might need to refresh the screen) |   |

*\*Top item of Workflow Tasks list should be* ***Referral Complete***

**How to check the status of the submitted Managed Referral**

To enable you to track the progress of managed referrals, you will receive referral notifications in EMIS Web from target organisations, to let you know whether referrals have been accepted, rejected or discharged. These notifications are displayed in the Referrals section of Care Record and in the Referral Management section of Workflow Manager.

Under Workflow Tasks, you can see whether the service has **Accepted**, **Rejected** or **Discharged** your referral.

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