

Revolutionising the referral process

Sherwood Forest Hospitals NHS Foundation Trust

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NHS Foundation Trust

This case study highlights how Choose and Book improved the quality of electronic referral reviews for all patients and greatly reduced the length of time to deliver appropriate patient appointments at Sherwood Forest Hospitals NHS Foundation Trust. It also looks at lessons learned.

Background

Choose and Book is a national service that, for the first time, combines electronic booking and a choice of hospital, date and time for first outpatient appointments.

Choose and Book went live at SFHFT on 1 August 2005, with the first bookings made on that date. This first stage of implementation included referrals to gynaecology, dermatology and rheumatology. Over the following months Sherwood Forest brought further services live on Choose and Book so that all specialties were live for routine and urgent referrals by the end of 2005.

Choose and Book has revolutionised referrals to secondary care across the Local Health Community (LHC) by requiring referring clinicians, and some practice nurses, to send referral letters electronically and by allowing patients to choose their initial hospital appointment and



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book it. Patients can either book straight away or later by a variety of different methods including the internet or calling the Appointments Line.

When the patient has booked an appointment at the hospital of their choice, Choose and Book forwards the referral letter from the GP to the relevant consultant worklist at their chosen hospital.

Clinical ownership was vital from the start

Mr Clive Pickles, a consultant gynaecologist at SFHFT, took the role of Secondary Care Clinical Lead for the project to implement Choose and Book at the Trust. His vital input began before the August 2005 go-live date when the Trust implementation team met to plan how the Trust's business

processes would develop to meet best patient care with the new Choose and Book application.

Introducing optimum business processes

Linda Pitchford, Outpatient and Booking Manager for the Trust, led the work to develop optimum business processes for reviewing Choose and Book referrals as they came into the Trust. With input from Mr Pickles and the clerical team in the Trust Appointments Office, Mrs Pitchford used the 'demo' software environment to review the functionality of the Choose and Book application. All the stakeholders concluded that the design of the Choose and Book application interface suited an electronic online referral review process by the consultant.

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The Choose and Book implementation team at SFHFT agreed that the service directors (consultant leads) for each clinical service line would take ownership of the business process, to facilitate online reviews. They were then trained in online usage by local Choose and Book trainers. The service directors then informed their consultant teams of the change to the review process (ensuring there was sufficient time in job plans) and monitored the training and implementation of the new process in their areas – acting as their teams' main point of contact for any problems that arose.

A major patient benefit of Choose and Book is the removal of the risk that a paper referral might go missing between GP surgery, possible referral management centres, clinical assessment teams, Acute

Two main issues about the new electronic referral review process were identified as a result of feedback from consultants:

- The application interface needed further development to make it more user friendly and intuitive for provider clinicians. It was identified that the national team had prioritised improvements for GPs to encourage usage, but now needed to focus on the needs of consultants.
- Feedback highlighted that the consultant worklists were pooled and therefore overly long, showing all referrals for each service on Choose and Book, not the specific referrals for a particular consultant.

Trust appointment offices and consultant in-trays. The stakeholders identified that this benefit would only be realised if consultants were given access to their referrals on Choose and Book.

Linda Pitchford fed her recommendations to the Trust Executive and Jeffrey Worrall, Chief Executive of SFHFT. She agreed with the decision to change the Trust referral review policy from a paper based process to an electronic process on Choose and Book. To support the Trust implementation team, Mr Worrall sent a letter to all consultants at the Trust informing them of the decision, the reasons behind the decision and providing reassurance of the support available from the Choose and Book project team.

Implementing electronic referral review

Armed with board level support for the new referral review process, the Choose and Book project team planned smartcard roll-out and training for consultants at the Trust. By 2006 all consultants were ready to review and action their referrals online.

To address these issues, a core group of consultants at the Trust met with national clinical and software development leads to discuss their feedback and agree a programme of improvements. Consultants at the Trust were pleased to see that these improvements had been made in recent releases of Choose and Book.

To address the second issue the Choose and Book implementation team worked closely with the Trust's Patient Administration System (PAS)



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Dr Dean Temple
GP, Orchard Medical Practice,
Mansfield

supplier to install an upgraded version that would allow named consultant referrals to be sent through the interface between PAS and Choose and Book.

In May 2006 the Trust was able to make named consultant referral functionality available on Choose and Book. This benefited patients who needed a named consultant referral by allowing their referrals to also be sent electronically.

Dr Dean Temple, General Practitioner at Orchard Medical Practice, Mansfield, was one of many GPs who welcomed the new functionality. He recognised that when consultants reviewed referrals online they would be able to improve the clinical communications in relation to the patient pathway.

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“As a working GP it is helpful to be able to choose a named consultant, for a number of different reasons. For example, where a patient has seen a particular consultant in the past, it helps when I am able to refer the patient to the same consultant aiding continuity of care,” said Dr Temple.

Dr Temple identified another advantage: “When patients themselves request a particular consultant team. Being able to meet these requests further enhances patient choice. There are also cases where a consultant is known to have a particular area of interest or expertise (over and above that displayed in the Choose and Book Directory of Services). There are cases where a referring GP may feel that a certain consultant’s ‘style’ might assist in the GP’s own relationship with the patient. All in all, the ability to refer a named consultant is very worthwhile.”

Another advantage is that a GP can make a named consultant referral; the named consultant functionality improves the

electronic referral review process for all patients. This is because it allows consultants to filter their worklists and only show the patients attending their own clinics. This greatly improves the quality of the referral review. Consultants at the Trust can now check that the referral letter contents properly match the exact clinic that the patient has booked, and request changes on Choose and Book if the patient needs to change their appointment.

Delivering patient benefits

In 2007 the Choose and Book teams at the Trust reviewed the benefits of the electronic referral review process to ensure that it had delivered improvements for patients.

To do this, the Trust Benefits team looked at what data they had on the old paper process and how many ‘missing gradings’ used to be recorded. Missing gradings are referral letters that have gone astray after they have been received at the Trust.



“One of the main advantages of Choose and Book is knowing that it provides patients with peace of mind. Choose and Book removes the risk that a paper referral might go missing, because the appointment details and referral letter are all saved securely in the system.”

Mr Clive Pickles
Consultant Gynaecologist,
SFHFT

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The following data was recorded for the Trust as a whole

Average number of days for a referral letter to be reviewed and the grading recorded on Patient Administration System, for all specialties	
May 2005	16.2
June 2005	12.2
July 2005	13.2
Choose and Book goes live	
September 2006	3.2
October 2006	2.0
November 2006	1.6



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These missing gradings will get chased up with the referring surgery if they fail to track at the hospital; so all will eventually be actioned, but sometimes after a delay of several days.

The benefit measure used was the average number of days that a referral takes to be 'graded' (or reviewed by the consultant) for a data sample before, and after, the go-live date on Choose and Book.

The conclusion of the benefits review was that allowing consultants to have direct access to their referrals on Choose and Book had greatly reduced the length of time taken to deliver an appropriate appointment to the patient, based on the patient's choices and the consultant's clinical review of the GP's referral letter.

This data only captures the benefits from data recorded at the Trust. There are additional benefits in reducing the number of referrals lost or delayed between the GP making the referral and the Trust receiving the referral in the Appointments Office. This data isn't available for analysis but the Trust benefits team feels confident in at least some reduction, given the reduction has been proved at the Acute Trust end.

A specific occurrence of this improvement was observed by Mr Pickles during his review of his gynaecology work list. Mr Pickles saw a Choose and Book referral from a local GP who asked if Mr Pickles would see a patient, previously referred by paper, who hadn't had a response from the hospital. On inspection the GP had evidenced the original missing referral by scanning a copy and attaching it to the Choose and Book UBRN. The fate of the original is unknown and must have been lost between leaving the GP surgery and arriving at the Trust via a referral management centre. Not only does the patient now have a secure referral located on Choose and Book, reviewed by a consultant online, but also an appointment booked providing peace of mind.

Learning lessons

Key lessons were learned from the implementation of Choose and Book at the Trust. These lessons have directed and informed further implementation of Choose and Book, for example going live with suspected cancer two week wait services. Those lessons are as follows:

- involve clinical stakeholders and keep them informed;
- adopt an honest approach acknowledging risks and working together on solutions;
- involve senior managers and directors, using a top down approach to engender confidence in the new processes;
- use available tools to review and analyse the available functionality, building knowledge of the system and an evidence based way forward;
- review benefits in order to establish the validity of the approach and to inform future direction.

NHS Connecting for Health is supporting the NHS to introduce new computer systems and services such as Choose and Book. These will help the NHS to deliver better, safer care for patients. For more information about this, visit our website www.connectingforhealth.nhs.uk