# Part 1: Creating referrals in the NHS e-Referral Service (e-RS)
Guide for optometrists in Cornwall and Isles of Scilly

Overview:
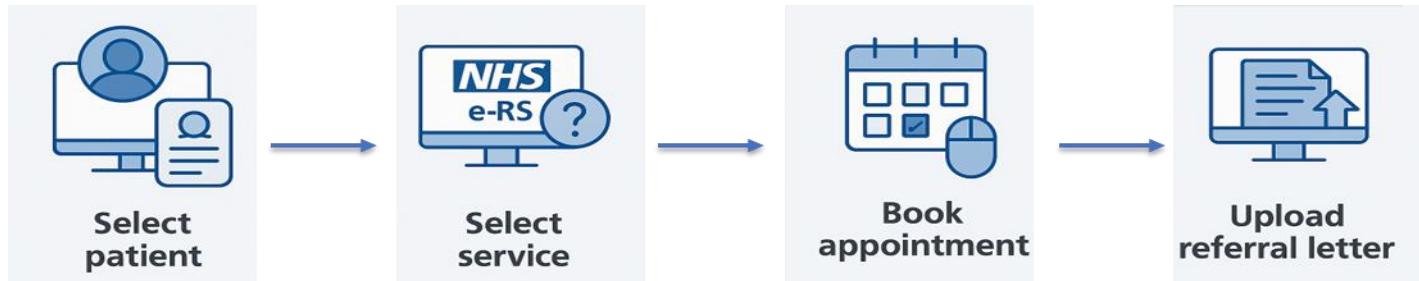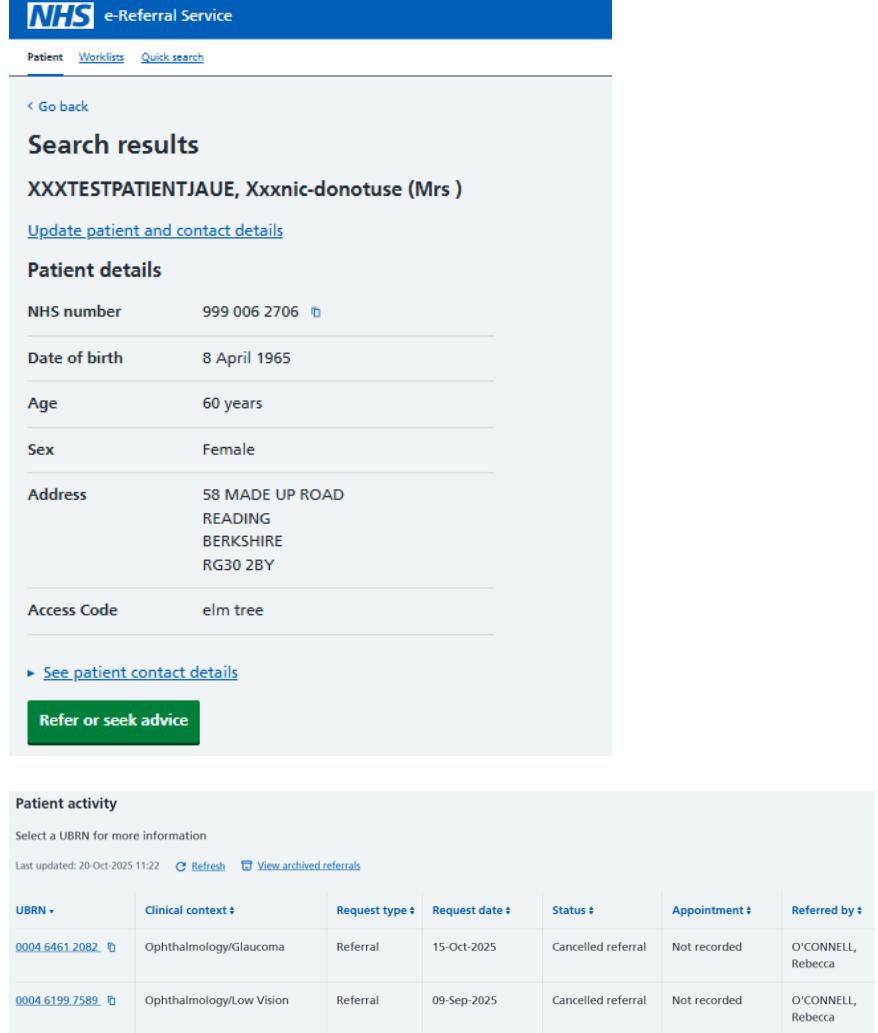
Key information

- Use the **NHS e-Referral Service (e-RS)** for **all routine/urgent optometry-to-ophthalmology referrals**
- **All other referral types** (e.g. wet AMD, emergencies, non-ophthalmology) should **continue to follow existing pathways**
- The **NHS Kernow Referral Management Service (RMS)** will support all optometry-to-ophthalmology referrals made via e-RS for patients registered with a GP practice in Cornwall or Devon
  - When selecting the service in e-RS, **always choose "NHS Kernow RMS"**
  - Once RMS receives your referral, they will (where appropriate) contact the patient to discuss options and book an appointment with their chosen provider — including all providers in **Cornwall & Devon** and beyond, if desired
- **Important:** Your referral will **not** leave your e-RS workflow until the referral letter has been attached
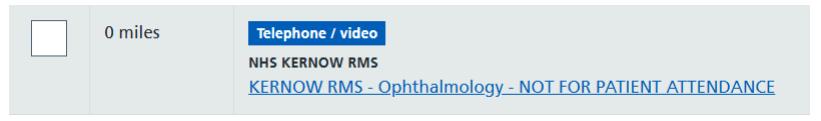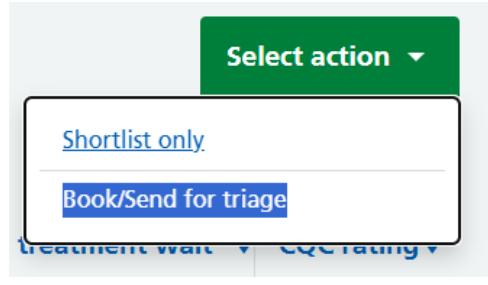
Key contacts

- For queries about your referrals please contact our **Referral Management Service (RMS)**: ciosicb.health@nhs.net
- For technical support and help to get set up on e-RS, please contact our **Registration Authority (RA)** via: citsservicedesk@nhs.net
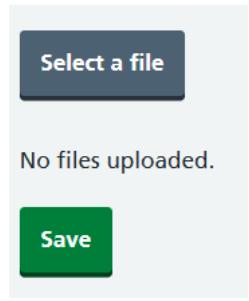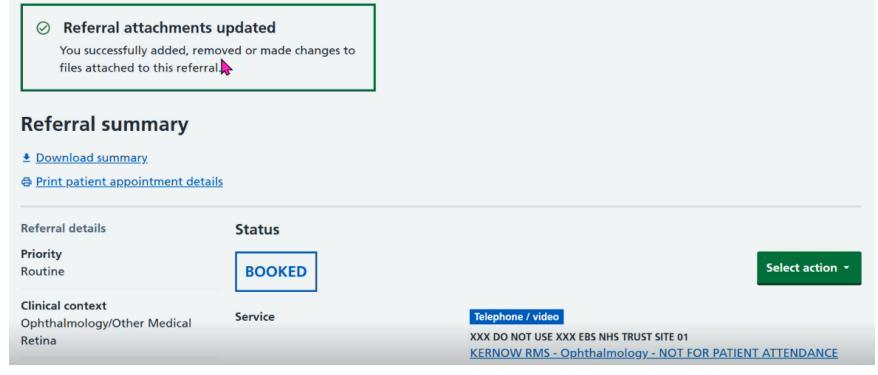
1.	**Log in to the NHS e-Referral Service: https://ers.nhs.uk/**
2.	Select your organisation and referring role click **Continue** Log in to the e-Referral Service **Select your organisation** Select an option **Continue**

| 3.	Find the patient you want to refer using one of the three available search methods: NHS number, UBRN (Unique Booking Reference Number) or Patient details Tip: if searching using Patient Details, make sure you enter the patient's name exactly as it registered with their GP. click **Search**	**Find a patient** **Select a search option** ○ NHS Number ○ UBRN ● Patient Details Search using a patient's name and date of birth **Search**
4.	The patient details are displayed Any previous referrals from your practice are shown in the patient activity section (see Appendix 1 for additional notes on viewing the referral history)	**NHS** e-Referral Service Patient Worklists Quick search ‹ Go back **Search results** **XXXTESTPATIENTJAUE, Xxxnic-donotuse (Mrs)** Update patient and contact details **Patient details** NHS number — 999 006 2706 Date of birth — 8 April 1965 Age — 60 years Sex — Female Address — 58 MADE UP ROAD READING BERKSHIRE RG30 2BY Access Code — elm tree ▶ See patient contact details **Refer or seek advice** **Patient activity** Select a UBRN for more information Last updated: 20-Oct-2025 11:22 ↻ Refresh ⬛ View archived referrals | UBRN ▾	Clinical context ⇅	Request type ⇅	Request date ⇅	Status ⇅	Appointment ⇅	Referred by ⇅
---	---	---	---	---	---	---
0004 6461 2082	Ophthalmology/Glaucoma	Referral	15-Oct-2025	Cancelled referral	Not recorded	O'CONNELL, Rebecca
0004 6199 7589	Ophthalmology/Low Vision	Referral	09-Sep-2025	Cancelled referral	Not recorded	O'CONNELL, Rebecca	
5.	After confirming you have the correct patient, you may proceed by selecting **Refer or seek advice**	**Refer or seek advice**

6.	As you are not the registered GP practice for the patient you will be presented with an **Are you sure you want to continue?** message, click **Continue anyway**	**Are you sure you want to continue?** This referral or advice request is being made outside the patient's registered GP practice. You are logged in as: XXX DO NOT USE XXX EBS GP PRACTICE 01 Patient's registered GP practice: WOODHOUSE MEDICAL CENTRE If you continue, all worklist items for this request will be assigned to XXX DO NOT USE XXX EBS GP PRACTICE 01 instead of the patient's registered GP practice. **Continue anyway** Go back
7.	The **Search for a service** screen will be displayed If you are logged in with the **Referring Clinician Admin** role you will need to select the **Referring Clinician** from the drop-down available. This is the optometrist on whose behalf the referral is being made. If you are logged in with the **Referring Clinician** role this will not be required Confirm request details: **Request Type** - Referral **Priority** – Routine, Urgent **Specialty** - Ophthalmology **Clinic type** – *Choose most appropriate clinic type for your referral* click **Search** (See Appendix 2 for alternative ways to search for a service)	**Search for a service** **Step 1: Confirm request details** **Request type** ◉ Referral ○ Advice **Priority** ○ Routine ○ Urgent ○ 2-week wait **Step 2: Select service details** Complete at least 1 field to continue **Specialty** [Ophthalmology ▼] **Clinic type** [Select an option ▼] **Named clinician** 🔍 Search for a clinician **Add more search detail** + **Search** **Reset**

8.	You will be presented with the **Referral service search results** screen. The list of services is displayed based on the distance from the patient's postcode. Select the Referral Management Service (RMS) service **NHS Kernow RMS**	☐ 0 miles **Telephone / video** **NHS KERNOW RMS** KERNOW RMS - Ophthalmology - NOT FOR PATIENT ATTENDANCE
9.	Once you have selected the RMS service click on **Select action** and choose **Book/Send for triage**	**Select action ▼** Shortlist only Book/Send for triage treatment wait ▼ CQC rating ▼
10.	A list of available RMS appointments will be displayed on screen. These are NOT real patient attendance appointments with a provider. They are dummy appointments used solely to allow the RMS to receive the referral. Please do not give these appointment details to the patient. **Select** the first available dummy appointment Select **Book appointment** (For information - once they have received your referral, the RMS will, where appropriate, contact the patient to discuss their options and book an appointment with their chosen provider)	**Book an appointment** **Wednesday 17 September 2025** 00:55 Select 00:56 Select 00:57 Select 00:58 Select 00:59 Select

11.	The **Review appointment before you book** screen will be displayed	**Review appointment before you book**
	Click **Book appointment**	**Important**
		The appointment is not booked yet. Review the appointment de make sure it is suitable for the patient before booking.
		Appointment details
		Date — Thursday 18 September 2025
		Time — 02:55
		Service — KERNOW RMS - Ophthalmology - NOT PATIENT ATTENDANCE
		Service type — This is a telephone / video service
		Priority — Routine
		Book appointment
12.	You will be shown confirmation that **You've successfully booked the appointment**	**You've successfully booked the appointment**
		What happens now?
	However please note, the referral will **NOT** leave your workflow until you have added the referral letter	You need to:
		• send the patient their appointment details
	Click **Add referral letter**	• add a referral letter for the service provider.
		Appointment details
		Date — Thursday 18 September 2025
		Time — 02:55
		Service — KERNOW RMS - Ophthalmology - NOT FOR PATIENT ATTENDANCE
		Service type — This is a telephone / video service
		Priority — Routine
		Important message from the service
		IMPORTANT – Please be advised that you MUST NOT attend this appointment. This is not an actual appointment but for administration purposes only. You will be contacted directly by the clinic in due course.
		🖶 Print patient appointment details
		📄 Add referral letter

13.	The **Manage referral attachments** screen will be displayed Click **Select a file** Attach any file(s) you wish to include with the referral Click **Save**	Select a file No files uploaded. Save
14.	You will receive confirmation that you have successfully added the attachment(s) and the referral has been BOOKED	⊘ **Referral attachments updated** You successfully added, removed or made changes to files attached to this referral. **Referral summary** ⬇ Download summary 🖶 Print patient appointment details Referral details **Status** **Priority** Routine **BOOKED** Select action ▾ **Clinical context** Service Ophthalmology/Other Medical Retina Telephone / video XXX DO NOT USE XXX EBS NHS TRUST SITE 01 KERNOW RMS - Ophthalmology - NOT FOR PATIENT ATTENDANCE
15.	# You have successfully sent the referral Once you return to the **Patient tab**, your referral will be listed under the **Patient Activity List*** (*see Appendix 1 for additional notes on viewing the referral history)	

Part 2: Managing your e-Referral Worklist
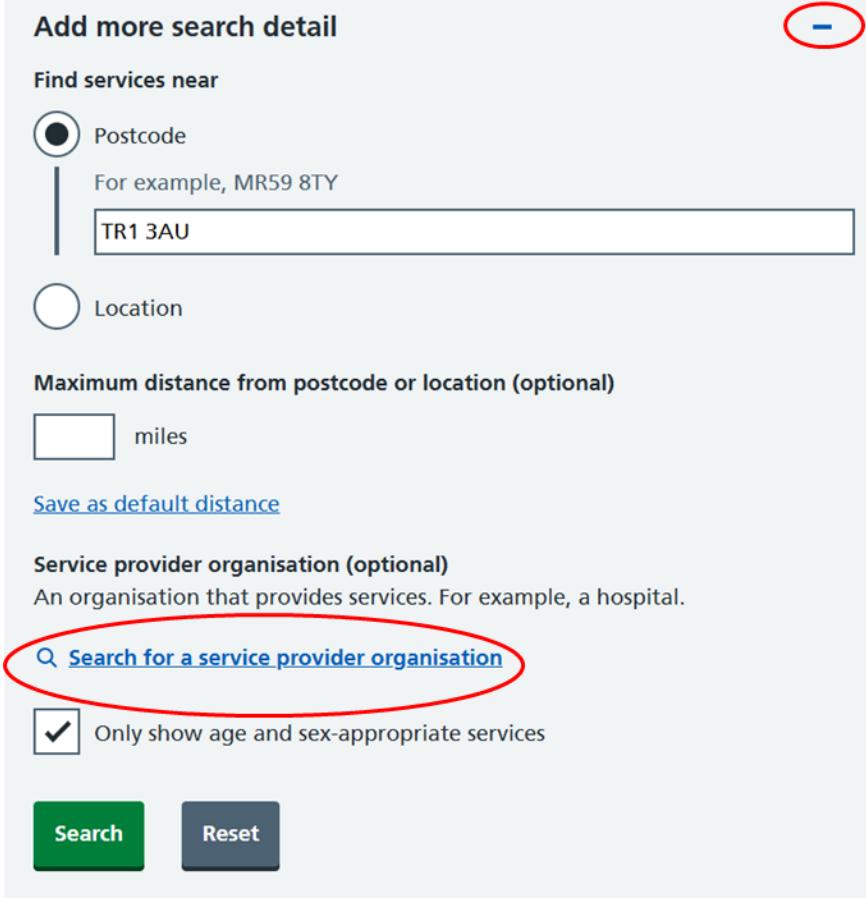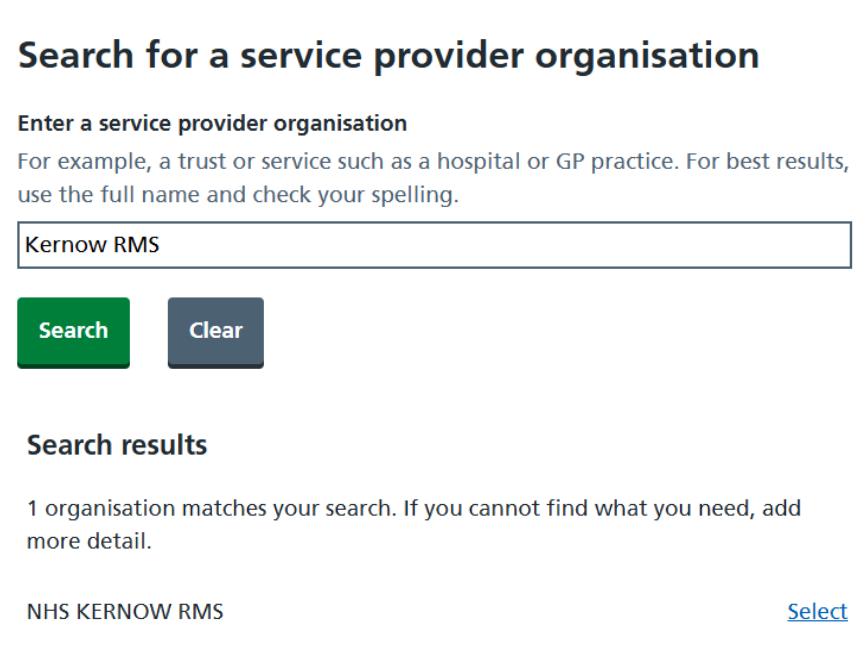
When referrals are created on the e-Referral system the worklist tab will need to be monitored and actioned accordingly:

- **Triage responses / Rejected referrals:** Any referrals that are returned due to requiring additional information or do not meet a guideline or policy will appear here, these will need actioning
- **Missing referral letters: This is one of the most important worklists to monitor** - if a referral is created but the letter is not added at the time of creation it will appear here, you will need to add the referral letter to ensure the referral leaves your workflow
- **Incomplete UBRNs:** (unlikely to see anything here for optometry referrals)
- **Active advice requests:** (unlikely to see anything here for optometry referrals)
- **Assessment results / Cancelled referrals / Did not attends:** Any cancellations or DNAs notifications
- **Referrals pending external action:** (unlikely to see anything here for optometry referrals)

Appendix 1 - Additional notes – referral history:

1.	The details of your patient referrals can be found in the **Patient activity** section at the bottom of the **Patient tab** Click on the Unique Booking Reference Number (UBRN) to see the referral details	**Patient activity** Select a UBRN for more information Last updated: 06-Jan-2026 13:21 ↻ Refresh ⊟ View archived referrals UBRN ↕	Clinical context ↕	Request type ↕	Request date ↕	Status ↕	Appointment ↕	Referred by ↕ 0004 6986 7502	Ophthalmology/Cataract	Referral	06-Jan-2026	Booked	21-Jan-2026 00:55	O'CONNELL, Rebecca 0004 6916 7846	Ophthalmology/Cataract	Referral	22-Dec-2025	Booked	09-Jan-2026 00:20	O'CONNELL, Rebecca
2.	You will be presented with the **Referral summary** page which gives a high level overview of the referral Click on **Referral history** to return a more detailed view	**Referral summary** 🖶 Print patient appointment details **Referral details** **Priority** Routine **Clinical context** Ophthalmology/Cataract **Referred by** O'CONNELL, Rebecca **Referring organisation** NHS CORNWALL AND THE ISLES OF SCILLY ICB - 11N **Patient's registered practice** TRESCOBEAS SURGERY **Related information** Referral history **Status** BOOKED **Referral letter due** **Service** **Appointment date** **Notes for patient** **Attachments** Add attachments No files are attached
3.	The **Referral history** will display a list of all actions that have taken place for this referral. Clicking on any action will show further details. You will see a second UBRN which is created when the RMS processes the referral. You can also drill down into this second UBRN to view the status and history. Sometimes you will see the full secondary care appointment details, but the level of information returned	UBRN: 0004 6626 3401 **Referral cancelled** 10-Nov-2025 at 12:14 **Reason for cancelling** Sent to outpatient service not available in this system glaucoma (cons/high risk) + VF + OCT + disc photos 4 07-NOV-2025 OPHTH-URG New PL URGE OPHTHALM NEW PATIENT ERS GLA(H)+V **User details** User	PRICE, Kelly Sarah (Ms) Role	Service provider clinician Organisation	ROYAL CORNWALL HOSPITALS NHS TRUST

will depend on the provider and /or clinic the referral is sent to.

In the example shown in the screenshot, it says, "**Referral cancelled**" with the reason "**sent to outpatient service not available in this system**" Other commonly used reasons include "**patient booked outside NHS e-Referral Service**"

Please note that in this context, the patient's referral-to-treatment pathway has **not** been cancelled. The provider has simply moved the booking into their own patient administration system (PAS), outside of e-RS.

If a referral is genuinely rejected, you will receive a separate notification by email or via the 'Rejected referrals' e-RS worklist, along with a comment explaining the reason and any actions you may need to take.

UNIVERSITY HOSPITALS PLYMOUTH NHS TRUST
Patient booked outside NHS e-Referral Service
08.12.25 - ZK WL added to IPM

ROYAL CORNWALL HOSPITALS NHS TRUST
Sent to outpatient service not available in this system
cataract

	Appendix 2 - Additional notes - alternative ways to search for a service:	
1.	From the **Search for a service** screen (step 7) you can refine your search by **clicking** on **Add more search detail** This will enable you to find services near a specific postcode or to search for a specific provider organisation To find the Kernow Referral Management Service (RMS) select **Search for a service provider organisation**	**Add more search detail** − **Find services near** ● Postcode For example, MR59 8TY TR1 3AU ○ Location Maximum distance from postcode or location (optional) ☐ miles Save as default distance Service provider organisation (optional) An organisation that provides services. For example, a hospital. Q **Search for a service provider organisation** ☑ Only show age and sex-appropriate services **Search** **Reset**
2.	Enter **Kernow RMS** Select **Search** Select the Referral Management Service (RMS) service **NHS Kernow RMS** and continue as before (step 9)	**Search for a service provider organisation** **Enter a service provider organisation** For example, a trust or service such as a hospital or GP practice. For best results, use the full name and check your spelling. Kernow RMS **Search** **Clear** **Search results** 1 organisation matches your search. If you cannot find what you need, add more detail. NHS KERNOW RMS Select

Appendix 3 - Additional notes - Referral attachments

- There is a limit of **5MB** for each individual attachment
- An unlimited number of files is permitted
- Any file/s attached will be displayed at the bottom of the screen

Accepted file types

- Plain Text (text/plain) - .txt
- PDF (application/pdf) - .pdf
- XML Text (text/xml) - .xml
- XML (application/xml) - .xml
- RTF Text (text/rtf) - .rtf, .rtx
- Basic Audio (audio/basic) - .au
- MPEG audio layer 3 (audio/mpeg) - .mp3
- PNG Image (image/png) - .png
- GIF Image (image/gif) - .gif
- JPEG Image (image/jpeg) - .jpg, .jpe, .jpeg
- TIFF Image (image/tiff) - .tif, .tiff
- MPEG Video (video/mpeg) - .mpg, .mpeg, .mpe
- MSWORD (application/msword) - .doc
- MSWORD (application/vnd.openxmlformats-officedocument.wordprocessingml.document) - .docx
- DICOM (text/dcm) - .dcm