# Shropshire, Telford and Wrekin ICB (STW)

# Electronic Eye Referral System (EeRS) Standard Operating Procedure

| Version Number | 2.0 | | |
|---|---|---|---|
| Effective Date | 01/11/2023 | Review Date | 01/11/2024 |
| Author | Lucy Jones | | |
| Approved by | Marie-Claire Wigley | | |
| Approval date | 30/10/2023 | | |
| Location | ICB Website | | |

| Document Control | | | | |
|---|---|---|---|---|
| Version | Date | Author | Status | Comments |
| 0.1 | 25/10/2023 | Lucy Jones | Draft | Reviewed and amended by Marie-Claire Wigley and Claire Roberts |
| 1.1 | | Lucy Jones | Draft | Sent for comment to LOC/SaTH/ RAS/TRAQs, Cinapsis |
| 2 | 15/12/2023 | Lucy Jones | Final | |

# Contents

# EeRS Overview

EeRS will provide an up-to-date digital platform for all Eyecare referrals and communications between primary, secondary, and tertiary care across the Shropshire, Telford and Wrekin footprint, cutting out the GP step where possible and removing the manual (email/Post) processes currently in place, empowering experts in eyecare to better manage patient care.

The EeRS will improve patient outcomes and the user experiences and will release benefits to the whole system including greater efficiency.

# Key Stakeholders

### NHSE Primary Care Team
NHSE underwent a procurement process in Autumn 2022, and as a result of this commissioned Cinapsis to provide the digital platform for EeRS across the 11 ICB's within the Midlands region for the period February 2023 -2026.

The NHSE Midlands Region are working with individual ICB's and optical practices to encourage adoption of EeRS and offer support during its implementation and beyond.

### Monmedical Ltd t/a Cinapsis
Cinapsis are the software company that have been commissioned by NHSE to host the EeRS platform across the Midlands region.

Cinapsis provides optometry practices with a secure online platform (web and or mobile app) that enables optometrists to submit requests for advice and guidance and/or referrals directly to acute and community settings. Service providers can then access Cinapsis on the secure platform and are able to review patient clinical and demographic data, and any images or supporting files that may have been submitted by the optometrist.

The service provider will issue an outcome on the EeRS platform, which will result in a summary outcome letter being returned to the referrer within Cinapsis.

### Shropshire, Telford and Wrekin Integrated Care Board (STW ICB)
STW ICB is proud to be an early adopter of EeRS within the Midlands region and the project team have worked with NHSE, Cinapsis and providers to migrate locally commissioned services into EeRS.

Initial implementation will include: all routine referrals, Wet AMD referrals and Advice and Guidance. It will not include cataract refinement (through the CHEC portal), MECs, Ocular emergencies, additional pathways may be migrated to EeRS during the life of the contract.

The Referral Assessment Service (RAS) / Telford Referral and Quality Service (TRAQs)
The RAS/TRAQs teamwork within STW ICB as a gateway for all referrals, ensuring that VBC criteria are met and offering patient choice prior to being uploaded onto ERS for booking with a provider.

RAS/TRAQs will process routine referrals within 5 days of receipt and urgent referrals will be processed within 24hours of receipt

### Shropshire Local Optical Committee (LOC)

Shropshire LOC represent Optometrists in Shropshire, Telford and Wrekin and have been fully engaged with both the planning and design and the implementation aspects of this project, for further information https://www.loc-online.co.uk/shropshire-loc/

## Optometrists

In order for Optometrists to access the EeRS platform, they must register their interest on the Cinapsis portal EeRS Registration of Interest

Please note - a pre-requirement to access EeRS is the **annual** completion of the Data Security and Protection Toolkit (DSPT), All organisation that have access to NHS patient data and systems must use the toolkit to provide assurance that they are practising good data security and that personal information is handled correctly.

Please see Appendix A 'Additional Optometrist information' document for further information

## Shrewsbury and Telford Hospital Trust (SaTH)

The Acute provider within Shropshire, Telford and Wrekin, SaTH deal directly with referrals for Wet AMD (see below pathway). Manage the Emergency Eye Clinic and provide Advice and Guidance to optometrists.

# High Level Flow
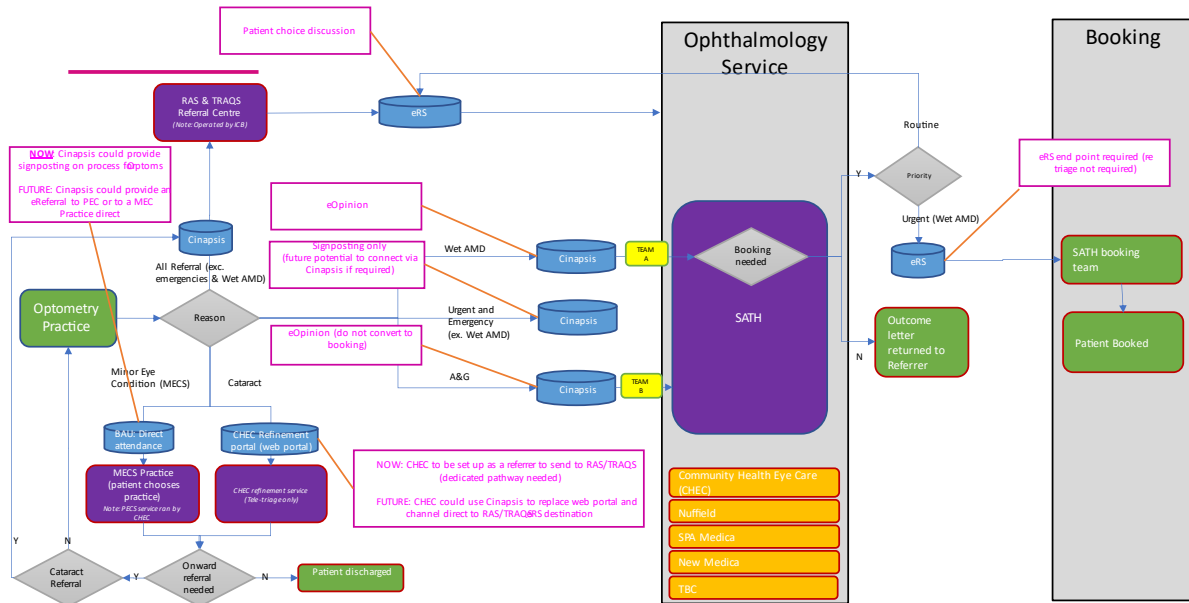


# Creating a new referral

Log into Cinapsis

Following patient selection, you will be asked to select a provider Organisation

Select a provider organisation

NHS Shropshire, Telford & Wrekin Referral Service (Routine >6wks; Urgent 4-6wks)

NHS The Shrewsbury & Telford Hospital NHS Trust (Wet AMD; Advice & Guidance)

# The Shrewsbury and Telford Hospital NHS Trust (Wet AMD, Advice and guidance)

Select provider organisation

NHS The Shrewsbury & Telford Hospital NHS Trust (Wet AMD; Advice & Guidance)

Ophthalmology (SATH)
eOpinion: Available, responded to within 3 days
Signpost

Emergency (UEC - information only)

Wet AMD - Referral ⚠

Advice and Guidance

# Emergency Eye Clinic

- Referrals can ONLY be received via telephone
- Please only refer genuine Urgent or Emergency conditions:
- Prior to referral, please call SaTH to speak with a Triage Nurse (please confirm if the patient is experiencing COVID-19 symptoms).

Call 01743 261476
9am-5pm Monday-Friday. 09:00am-12:00pm Saturday and 10:00am-12:00pm Sunday.
Reduced hours on Bank Holidays.

Patients with an acute and sight threatening eye complaints outside of these times **that cannot wait until the following day** should present to the main Emergency Department at Royal Shrewsbury Hospital.

# Referring patients with Wet AMD

- Please ensure all patient details are correct, you have included OCT Scans (if taken) and the Visual Acuities as the doctor cannot properly grade the referral without them.
- You will receive an Outcome report as soon as the patient's case has been accepted.
- The team will be available from: 09:00am-17:00pm Monday-Friday
- If you require any assistance or have a query, please contact the medical secretaries at sath.wamd@nhs.net (please do not send referrals via this email address)
- All routine cases will be re-directed back to RAS & TRAQS.
- All urgent cases will go to the Ophthalmology Bookings Teams.

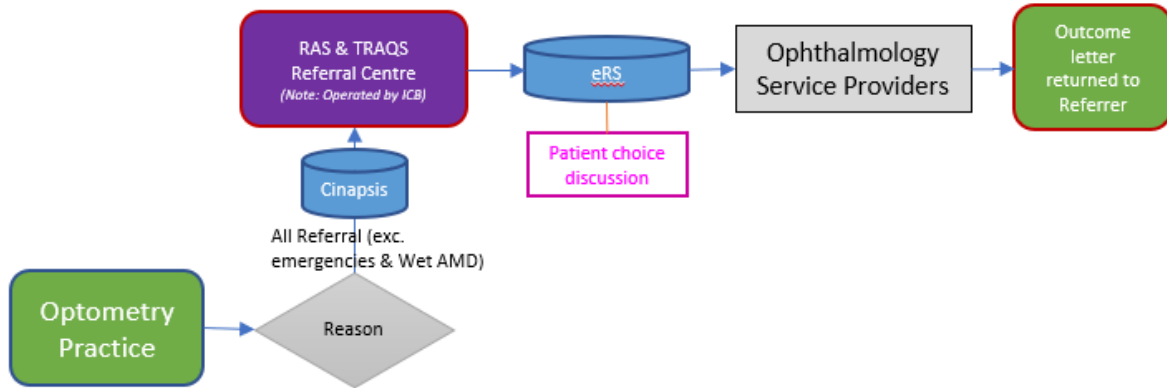## Wet AMD Referral pathway
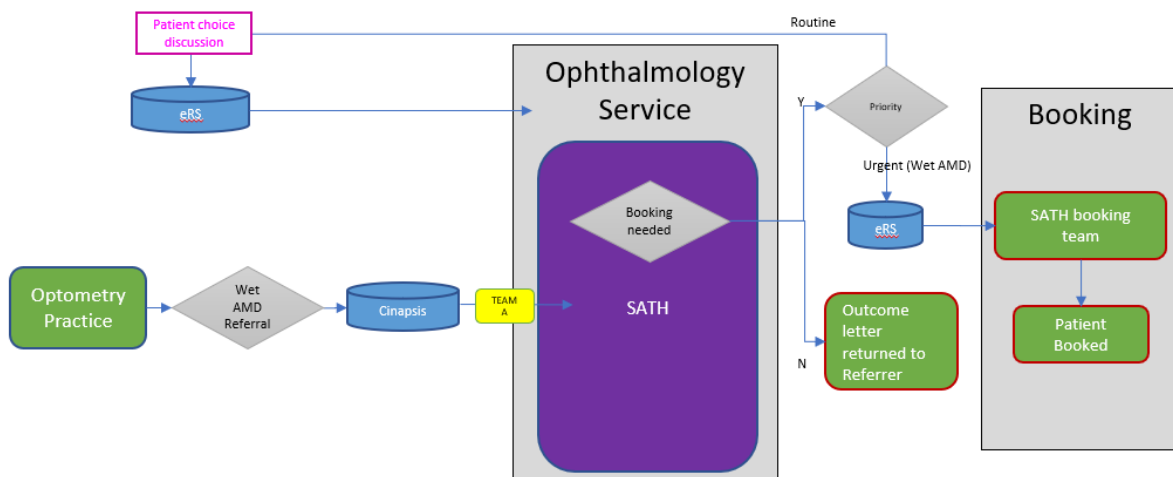


# Advice and Guidance

Optometrists can use Cinapsis to request Advice and guidance from SaTH Ophthalmology department by completing the generic form on Cinapsis, this will be picked up by the medical secretaries who will pass for triage by the most suitable clinician, a response will be formulated and returned via the medical secretaries and Cinapsis within ...hours

# Shropshire, Telford and Wrekin Referral Service (Routine >6wks; Urgent 4-6wks)

For all non-emergency referrals, except for cataract referrals by CHEC accredited Optometrists (please see below)

## RAS/TRAQs Referral pathway



Select provider organisation

**NHS** Shropshire, Telford & Wrekin Referral Service (Routine >6wks; Urgent 4-6wks)



Select the most appropriate pathway and choose from 'routine' or 'urgent'

# Cinapsis Support and Training

ALL STAFF SHOULD undertake the relevant training articles within the cinapsis knowledge base

For help and support with the Cinapsis system

- Log into Cinapsis
- click the 3 horizontal lines in the top right of the screen (the burger menu) and select help

- this link will also take you to the help page:

  https://support.cinapsis.com/hc/en-gb
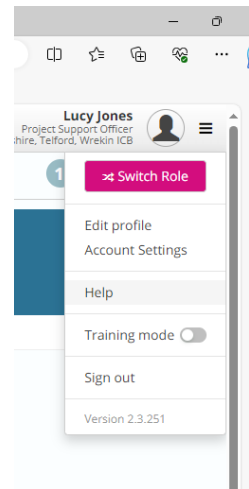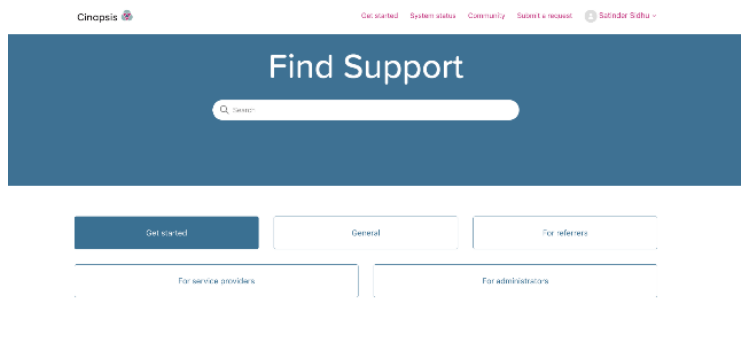
- Within this Help section, there are several articles, covering many different topics
- You can access the live chat feature, email support support@cinapsis.org or call 0203 8580124
- Should Cinapsis be 'down' Please refer to the Business Continuity Plan on the ICB website
- Should an issue occur with Cinapsis, in the first instance please contact support@cinapsis.org, escalation should be through the EeRS project lead within your organisation. For Optoms – the LOC Lead. Issues can also be escalated to The ICB EeRS Transformation Lead

# Communicating Change

## Changes to the DOS

- To ensure the continuity of information, all changes to the Directory of Services 'DOS' for the Wet AMD and Advice and Guidance pathways, for example if the contact details for an endpoint are updated, should be communicated to the Elective Care Transformation lead for Eyecare/EeRS via stw.transformationteam@nhs.net . The ICB will then take steps to inform Cinapsis, referring Optometrists and GP practices
- If necessary, these changes will be reflected on the ICB/LOC websites and within the operational SOPs for RAS/TRAQS and SaTH

## Changes to Cinapsis Functionality

- Changes to the functionality of the cinapsis software will be communicated out to individuals via the Cinapsis app.
- The ICB will also be informed of any changes to functionality, the ICB will then disseminate this information to all relevant stakeholders via the blow route
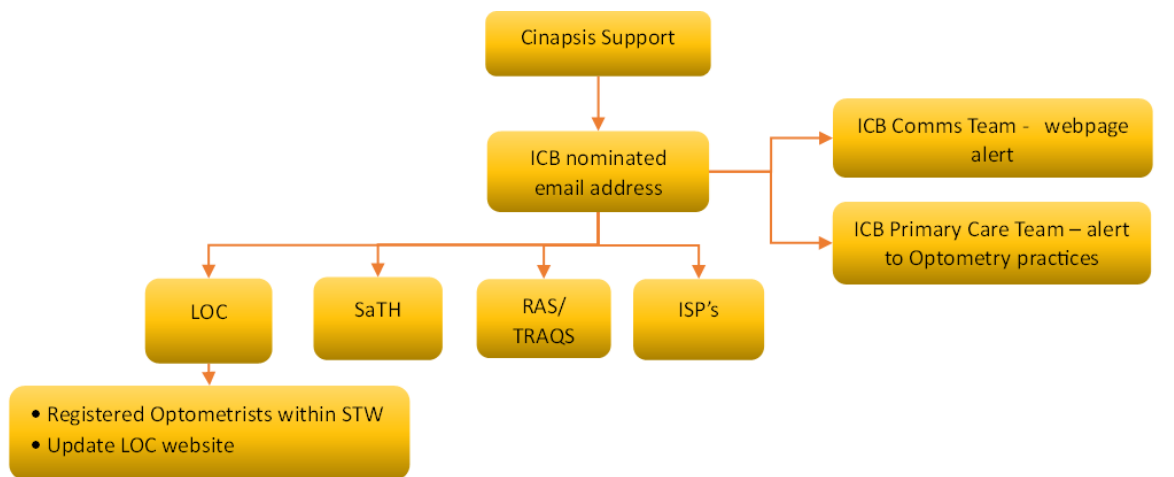


## Audit

Operational responsibility for the management of incorrect referrals lies within each relevant part of the pathway. This will be reviewed as part of 6 monthly audit, carried out by the Elective Care Transformation lead for Eyecare/EeRS, and will cover as a minimum the following themes

- Issues with referrals that include images (N.B there is currently no contractual obligation for refers to include images)
- Rejected referrals – reasons, onward learning
- Optometrist practices/ individuals' non-compliance to follow the referral pathway
- Advice and Guidance requests

## Role-based Access Control (RBAC) (Permissions)

- Roles within Cinapsis will be allocated based on job role and should be discussed with the Administrator within your organisation.
- For all other access requests please direct these to the Elective Care Transformation lead for Eyecare/EeRS within the ICB

# Appendix A – Additional Information for Referring Optometrists

## Prepare your Optical Practice for EeRS

**ACTION 1** – for practices that have not yet 'onboarded' to the Cinapsis website *URGENT*
- If you still need to 'onboard' your practice with the Cinapsis EeRS portal, please do so ASAP by clicking the following link: EeRS Registration of Interest.

**ACTION 2** – for practices that have already onboarded with Cinapsis
- You currently have only one user account setup for your practice (this was setup during your Registration of interest/ onboarding)
- Please follow the instructions in the 'Adding new users on cinapsis' guide, to add additional Optom and admin users to your practice Cinapsis account

- Each Cinapsis user account, including the admin, is for individual use only. Never share account logins or have multiple users using the same account
- A separate user account must be created for each individual Optom or administrator performing in your practice
- Locums will need to be added as Cinapsis users to each individual practice at which they work by the Cinapsis admin user of each practice
- Video guide available here: https://support.cinapsis.com/hc/en-gb/articles/6369548755089-Step-2-Add-and-remove-users-or-change-user-permissions-7-min
- Please note in the above video guide, the trainer refers to adding GPS. The steps are the same for Optometry practices, we shall just be adding Optoms
- Further video guides are available in the help section of the Cinapsis website – please use the following link: https://support.cinapsis.com/hc/en-gb/sections/8238413424145-Referring-Optometrists
- The above link opens a page for 'Referring Optometrists' with 9 steps. The title text for each step is a clickable when the cursor is hovered over (screenshot below)

## What will change on Go-live day?
- GOS 18 Referrals will be sent via your Cinapsis login and will be sent directly to RAS/TRAQ (the choice centres who contact patients to arrange ophthalmology appts to the patient's chosen provider). - Both **Routine (>6 weeks)** and **Urgent Referrals (4-6 weeks)** are to be processed through the 'Shropshire, Telford & Wrekin Referral Service' provider selection (the top box in the screenshot below)

- **Wet AMD referrals** and **Advice & Guidance** will also be sent via your Cinapsis login and should be sent directly to SaTH. - You will see the 'SaTH' provider as an option after entering patient details on the Cinapsis platform (the bottom box in the screenshot below)

## TIPS for Go-live day:
**DO**
- Login to Cinapsis portal using individual Optom user account to:
- Send ophthalmic referrals to RAS/TRAQS via Cinapsis
- Send Wet AMD referrals to SaTH via Cinapsis
- Raise A&G requests to SaTH via Cinapsis

**DON'T**
- Send a GOS18 referral letter to the GP as previously
- Raise email requests to SaTH A&G or Wet AMD referrals as previously

# Additional Information

## Out of Area patients

Patients should only be referred through EeRS/Cinapsis if registered to a Shropshire, Telford and Wrekin GP practice, for patients with GPs out of our county, the referral should be sent directly to the patient's GP to process.

## GP Referrals

### Referrals to GP Only
- The Cinapsis portal is not to be used for referrals to the GP only.
- Please continue to refer these patients directly to the GP using Form B or equivalent wording.

### Referrals requiring both Ophthalmology & GP attention
- Where a referral requires input from both ophthalmology and GP, please refer via Cinapsis only.
- Please select the appropriate hospital clinic for the eye condition and include clearly in your referral 'Also needs GP action' with details. The referral will then be passed to the GP by RAS/TRAQs.

### Urgent Referrals to GP
- Any referral that is directed to RAS/TRAQS will experience a delay before being reviewed. All urgent referrals to GP, whether they need ophthalmology input or not, should be sent directly to the GP using Form B with a clinically appropriate urgency.

## Unknown Patients

Patients who do not match on the NHS spine and are pushed through to RAS / TRAQs by the optometrist will not be accepted, the referral will be returned to the referring optometrist, as the referral cannot be placed onto eRS without the correct information.

- When a new referral is created, the Cinapsis system will attempt to find your patient on the 'NHS spine'. To confirm a match, ensure the search is undertaken using the patients correct (official) name.
- To avoid the referral being rejected, start the referral whilst the patient is in practice to give the opportunity to ask for other names / DOB, the referral can be saved as a draft ad completed later in the day
- As a last resort only: If the patient is registered with a GP, however after investigation they cannot be matched on the spine, the referral should be directed to the GP to add this detail, this action should be undertaken as a last resort only.

If a patient presents at an optometry practice and is not registered with a GP:
- The eye referral should be printed by the optometrist
- Handed to the patient to share with their GP once registered.

The Acute provider, SaTH can generate a temporary NHS number should the patient be 'unknown' and need to be seen in an emergency as part of the Wet AMD pathway.