

User Guide

Referral Portal – Including Webforms

November 2022

Version 2.2

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1 Introduction

The referral portal has been developed as a quick and convenient way for ICBs to receive CHC referrals that can be imported directly into their patient management system.

The portal is accessible online by both the ICB and a referrer and is a fully digital platform for submitting and receiving CHC referrals and multiple forms of documentation.

This guidance document will provide information on webforms so you can create a referral digitally, via the portal, and upload to the ICB, known as DRAR (Digital, Referral, Assessment and Reviews). It will also provide guidance on how to upload a referral that has been received and not completed via the portal.

2 Accessing the Referral Portal

The portal can be accessed via your internet browser, ideally Chrome or Microsoft Edge, however, we would recommend having the latest version of the software to ensure the best performance.

3 Logging into the Referral Portal

- Enter <https://referral-portal.chshealthcare.co.uk/> into your web-browser.

You will be directed to DRAR and the below login page.



Referral Portal

Email Address

Password

PIN

[Forgotten password?](#) [Need Help?](#)

- Click Register which can be found at the bottom of the home page/login screen.

You will be directed to the below page, please enter your details into the sections with an * which have been highlighted in yellow.

Please note these are mandatory fields, and you will be unable to submit until they are complete.

Back



Register

User Details	
Email Address: *	Password: *
<input type="text"/>	<input type="password"/>
Full Name: *	
<input type="text"/>	
Job Title: *	Phone Number: *
<input type="text"/>	<input type="text"/>
Place Of Business: *	
<input type="text"/>	

Training	
<input type="checkbox"/> Completed Checklist Training	
Date Of Training:	Training Renewal Date:
<input type="text"/>	<input type="text"/>

CCG(s)/HB(s)
CCG(s)/HB(s): *
<input type="text"/>

Submit

Please note in the training section, you can enter a date that you completed the training or a date that has been agreed with the ICB, if you are unsure, please contact the ICB Lead who can provide this to you.

You will also need to select the ICB you work for, and you can select more than one.

Once you are ready to upload a referral, the ICB/s you have selected will be provided as an option, this is to ensure the referral and any supporting documentation is uploaded to the correct ICB Management System.

- Once you have completed all sections, please click the Submit button.
- You will then receive a verification email (see image below).

Please complete the login process by clicking the link provided in this email.

You have recently registered to the CHC Referral Portal. Please use the following link to confirm your account [Confirm account](#)



- If you forget your password this can be selected at the bottom of the login page by clicking Forgotten password.

- If you require assistance, please press the Need Help button and you will be redirected to the below page.



Need Help

Are you an external user submitting referrals to a CCG/HB? [Click here](#)

Are you a CCG/HB Administrator? [Click here](#)

Please click on the most appropriate option.

- If you are an External Referrer, for instance a Care Home, you will be directed to the below page, in which you can select the ICB you are referring to.



External Referrer Help

Are you having problems logging in? [See our user guide](#)

Still having problems? You need to contact your CCG's/HB's Referral Portal Administrator

Select CCG/HB

Please select a CCG/HB



- If you work for the ICB, you will be directed to the below page and have three options.
 1. Refer to the User Guide
 2. Log a ticket on the support portal
 3. Contact the support desk directly by phone



CCG/HB Admin Help

Are you having problems logging in? [See our user guide](#)

Still having problems? You need to contact the support team.

Click [here](#) to log an issue on the support portal.

Or contact our support desk on 01270 845000

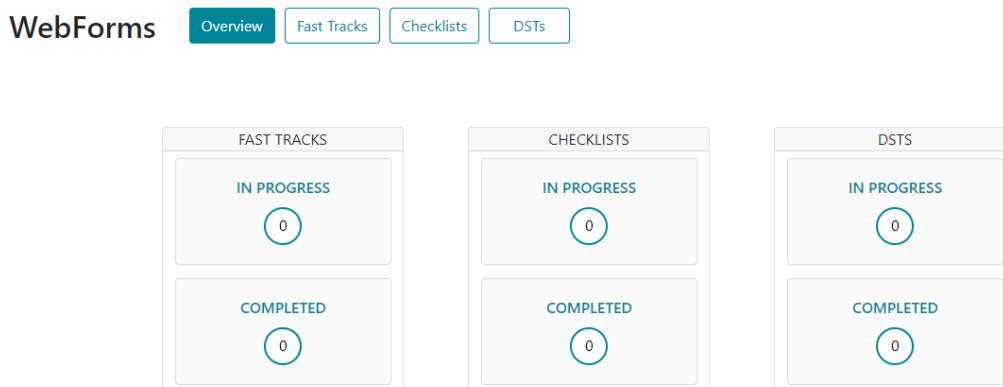
4 Completing a Digital Referral

Once you have logged in, you will be presented with the 'Dashboard' page, this is where you will see the referrals you have submitted and can submit a new referral/digital form.



Webforms Tab

The Webforms tab provides an overview of any webform you are still completing (in progress) and any completed forms, these include Fast Tracks, Checklists and DSTs.



You can either click on one of the tabs across the top.

WebForms

- Overview
- Fast Tracks
- Checklists
- DSTs

Or you can click in one of the below sections.

Section	In Progress	Completed
FAST TRACKS	0	0
CHECKLISTS	0	0
DSTS	0	0

This will take you to the below screen, providing additional information.

[+ New Webform](#)
Sorted By: **Status - desc**

#	Created Date ↓	Patient ↓	DOB	NHS Number	CCG/HB ↓	Status ↓	Edit Date ↓	Action
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This is also where you can submit a new digital referral.

5 Completing a Digital Fast Track Referral

The Digital Fast Track Referral is identical to the more traditional paper Fast Track Referrals.

You can find the CHC Fast Track Guidance (the same that you would find at the start of a paper Fast Track) by Clicking on the ? Icon and then selecting Guidance. (This will open in PDF Format.)

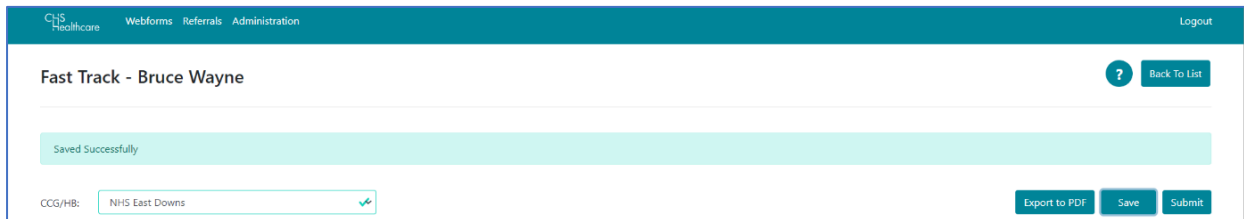
You can also find guidance on the **Mandatory Fields** here. They must be completed before you can submit the Digital Fast Track Referral.

There are some generic or minimum Mandatory Fields that are set as an NHSE requirement and then there are some CCG specific Mandatory Fields.

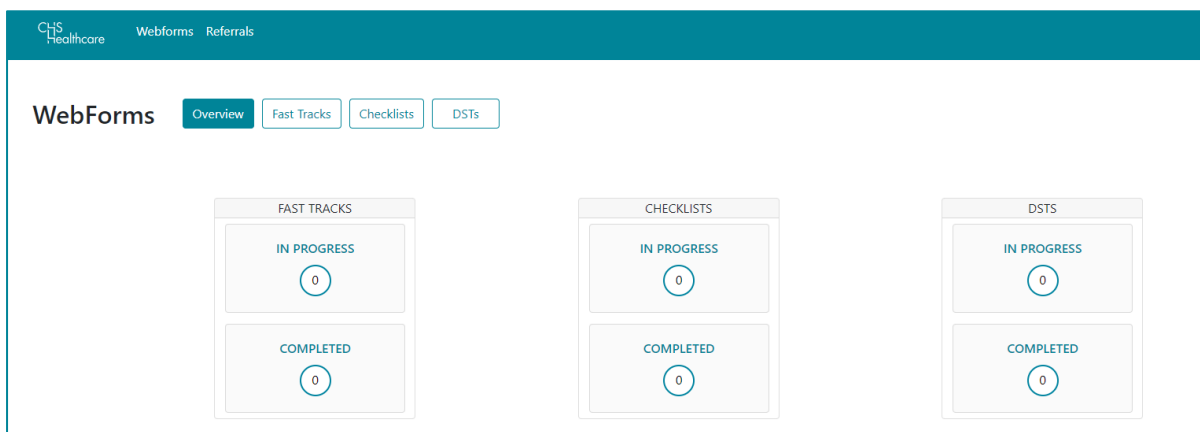
You will also get a 'reminder' at the top of your Digital Fast Track Referral which highlights any mandatory fields that need to be completed on that part of the Digital Fast Track Referral.



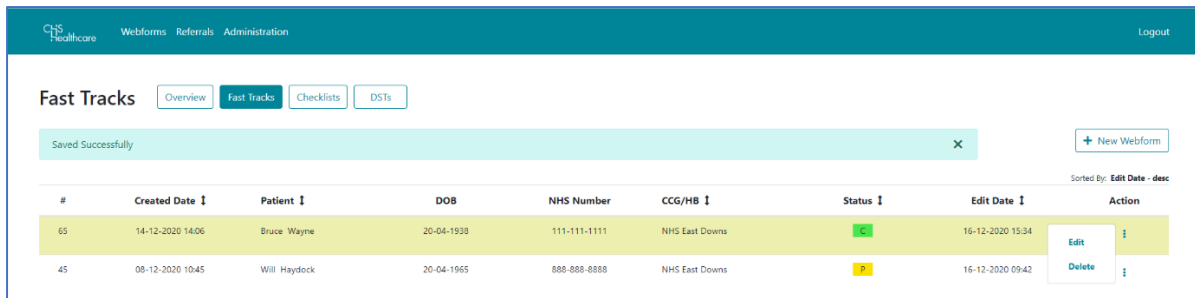
You can Save your Digital Fast Track Referral at any time by clicking on the **Save** Button. You'll get a notification confirming that the Digital Fast Track has been **saved successfully**.



It will then appear in (and can be accessed from) the **Fast Tracks** option on the Webforms page.



Click **Fast Tracks** and then click on the Action Icon (three vertical dots) for the relevant Digital Fast Track. Select **Edit** from the pop-up menu to open it and resume your referral.

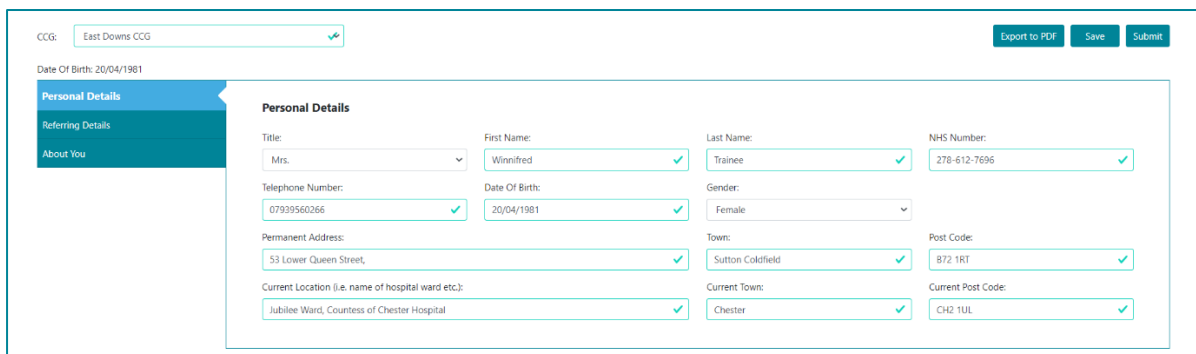


#	Created Date	Patient	DOB	NHS Number	CCG/HB	Status	Edit Date	Action
65	14-12-2020 14:06	Bruce Wayne	20-04-1938	111-111-1111	NHS East Downs	✓	16-12-2020 15:34	Edit
45	08-12-2020 10:45	Will Haydock	20-04-1965	888-888-8888	NHS East Downs	✗	16-12-2020 09:42	Delete

Personal Details

To complete a **Digital Fast Track Referral**, you need to:

1. Select the correct **ICB** from the Dropdown Menu.
2. Then complete the Patients **Personal Details** section.



CCG: East Downs CCG

Date Of Birth: 20/04/1981

Personal Details

Title: Mrs. ✓

First Name: Winnifred ✓

Last Name: Trainee ✓

NHS Number: 278-612-7696 ✓

Telephone Number: 07939560266 ✓

Date Of Birth: 20/04/1981 ✓

Gender: Female

Permanent Address: 53 Lower Queen Street, ✓

Town: Sutton Coldfield ✓

Post Code: B72 1RT ✓

Current Location (i.e. name of hospital ward etc.): Jubilee Ward, Countess of Chester Hospital ✓

Current Town: Chester ✓

Current Post Code: CH2 1UL ✓

The fields that you need to complete are:

- Title (via Dropdown Menu)
- First Name
- Last Name
- NHS Number
- Telephone Number
- GP Practice
- Gender (Via Dropdown Menu)
- Date of Birth
- Permanent Address, Town, & Postcode
- Current Location (i.e. name of Hospital Ward etc...), Town & Current Postcode

Once you complete the fields they will be marked with a **green tick**.

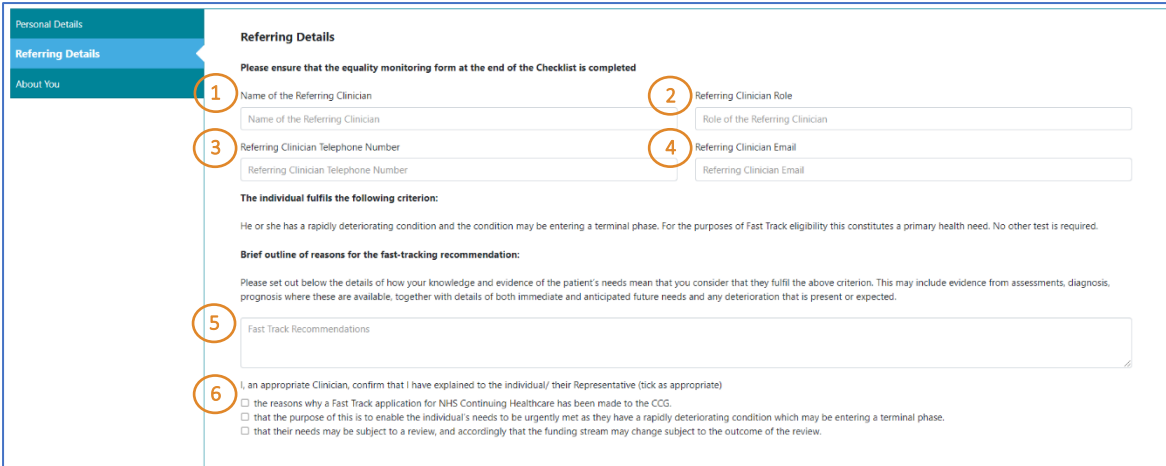
There are various validation checks that make sure that some key pieces of the information you enter is in the correct format.

After completing the Patients Personal Details, you can move on to the rest of the Digital Fast Track.

You navigate between the sections by simply clicking on them.

Referring Details

The **Referring Details** section has the following information for you to complete:



The screenshot shows the 'Referring Details' section of a form. On the left, there is a navigation menu with 'Personal Details', 'Referring Details' (highlighted), and 'About You'. The main content area is titled 'Referring Details' and includes a note: 'Please ensure that the equality monitoring form at the end of the Checklist is completed'. There are six numbered callouts pointing to specific fields:

- 1. Name of the Referring Clinician (text input field)
- 2. Referring Clinician Role (text input field)
- 3. Referring Clinician Telephone Number (text input field)
- 4. Referring Clinician Email (text input field)
- 5. Fast Track Recommendations (text area)
- 6. Confirmation section with checkboxes:
 - I, an appropriate Clinician, confirm that I have explained to the individual/ their Representative (tick as appropriate)
 - the reasons why a Fast Track application for NHS Continuing Healthcare has been made to the CCG.
 - that the purpose of this is to enable the individual's needs to be urgently met as they have a rapidly deteriorating condition which may be entering a terminal phase.
 - that their needs may be subject to a review, and accordingly that the funding stream may change subject to the outcome of the review.

1. Name of Referring Clinician.
2. Referring Clinician Role.
3. Referring Clinician Telephone Number.
4. Referring Clinician Email.
5. Fast Track Recommendations.
6. Appropriate Clinician explanation(s) Confirmation.

It is important that you complete all the information required in the same way that you would for a traditional paper Fast Track referral.

Once you've completed the Referring Details section you can move on to **About You**.

About You

This still relates to the patient, and certain key demographic information will **automatically populate** within the **About You** section based on the information you added to the patients **Personal Details** section at the start of the Digital Fast Track Referral.

Date Of Birth: 20/04/1981

Personal Details
Referring Details
About You

About you - equality monitoring

Please ensure that this form is sent directly to the CCG without delay.

Please provide us with some information about yourself. This will help us to understand whether people are receiving fair and equal access to NHS continuing healthcare. All the information you provide will be kept completely confidential by the Clinical Commissioning Group. No identifiable information about you will be passed on to any other bodies, members of the public or press.

Gender:

Age Group:

Ethnic Group:

Sexual Orientation:

Religion:

Christian includes Church of England/Wales/ Scotland, Catholic, Protestant and all other Christian denominations.

Do you have the disability as defined by the Equalities Act 2010 ?

The Equalities Act 2010
Defines a person with a disability as someone who has physical or mental impairment that has a substantial and a long-term adverse effect on his or her ability to carry out normal day to day activities.

All the options within **About You** are selected from drop-down menus.

You have the option to select **Prefer not to answer** if the patient is unwilling to provide that level of personal information about themselves.

Adding a Digital Signature

The signature section will appear once you've completed all the other sections to your Digital Fast Track Referral.

Date of Completion: 11/11/2020 Date Of Birth: 20/04/1981

Personal Details
Referring Details
Signature ⚠️
About You

Signatures

As the referrer your information will populate the Signature section. It will include:

- Name.
- Role.
- Email.
- An automatically generated Digital Signature.
- Telephone Number (which is an editable field, so you can update it in necessary).

You can add an additional signatory by clicking on the **Add** button.

To add your electronic signature the Digital Fast Track Referral Click **Save**.

The screenshot shows a 'Signatures' section with an 'Add' button at the top right. Below it is a form with the following fields: Name (Will Haydock), Email (will.haydock@chshealthcare.co.uk), Organisation (CHS Healthcare), Role (IT Systems Trainer), Signature (Will Haydock), and Telephone (07833127931). The 'Save' and 'Cancel' buttons are highlighted with orange boxes.

This will add a **date of signature** and change the Save/Cancel buttons to **Edit** (Pencil) and **Delete** (Bin) icons.

The screenshot shows the 'Signatures' section after saving. The 'Save' and 'Cancel' buttons have been replaced by 'Edit' (pencil icon) and 'Delete' (bin icon) buttons. A date of signature '11/11/2020' has been added to the form. The 'Edit' and 'Delete' buttons are highlighted with orange boxes.

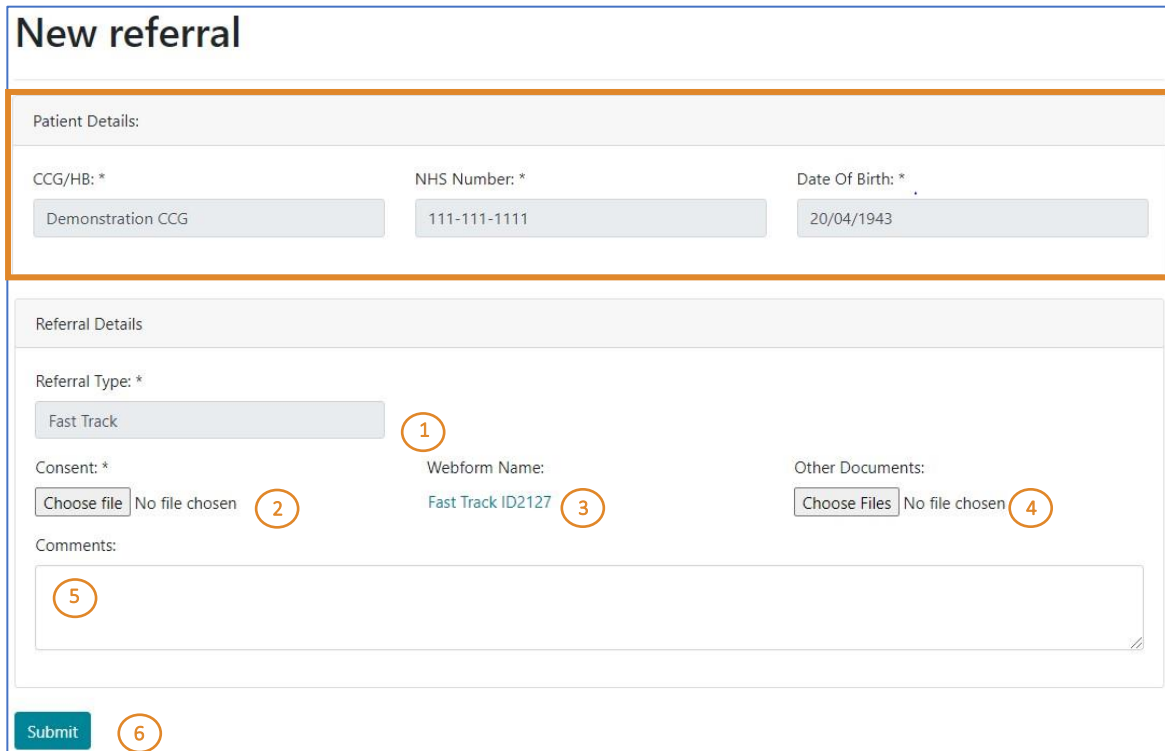
Once you have signed the Digital Fast Track, you're able to submit your referral.

Submitting your completed Digital Fast Track Referral

Once you've fully completed a Digital Fast Track Referral click **Submit**.

The screenshot shows a 'CheckList - Wilber Trainer' form. It includes a dropdown menu for 'CCO' set to 'East Dorset CCG', a 'Date Of Birth' field with the value '20/04/1981', and a 'Personal Details' section. The 'Submit' button is highlighted with an orange box.

You will be taken to the **New Referral** screen.



New referral

Patient Details:

CCG/HB: * NHS Number: * Date Of Birth: *

Referral Details

Referral Type: * 1

Consent: * No file chosen 2 Webform Name: 3 Other Documents: No file chosen 4

Comments: 5

6

The **Patient Details** section will be automatically populated from the Digital Fast Track. The **Referral Details** section will have the following sections (some of which you can update).

1. **Referral Type** – This will automatically populate with **Fast Track**.
2. **Consent** – Click **Choose file** to upload the signed **Consent Document**.
3. **Webform Name** – This will automatically populate with the **Digital Fast Track ID**.
4. **Other Documents** – Click **Choose file** to upload **all evidence to support your referral**.
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click Choose File again to add an additional Document.
 - c. Or click Choose File and then hold the Shift Key on your keyboard while selecting multiple files from the same folder
5. **Comments** – This is your opportunity to add any additional comments about your referral.
6. Click **Submit** to send your Digital Fast Track Referral to the CCG.

Your referral will be added to the **Referrals Screen**, and you will get the following message:

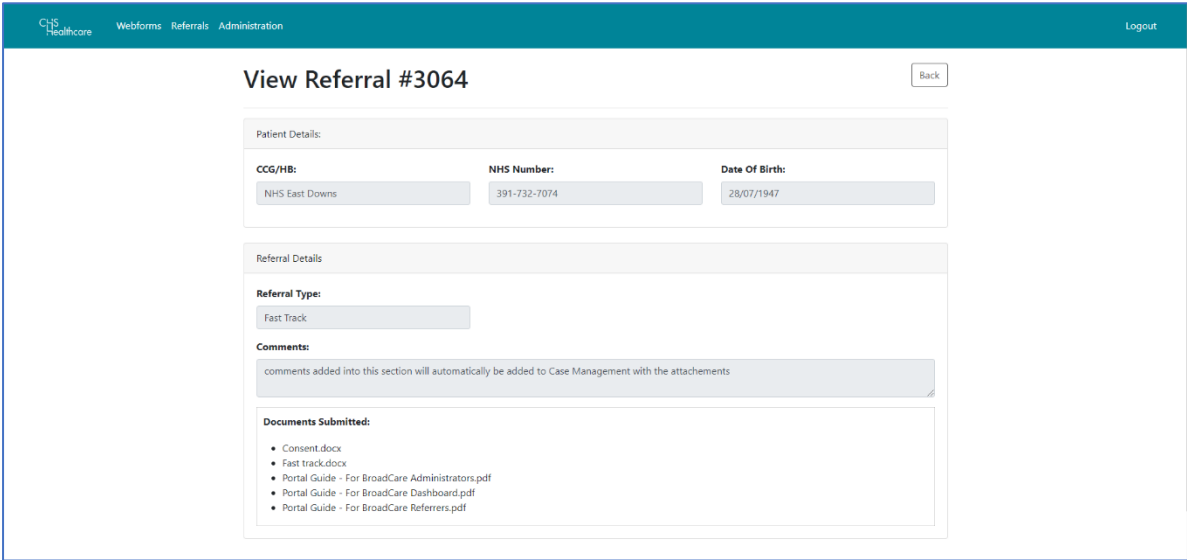
“Referral submitted successfully to <Name> CCG”



View your Fast Track Referral

To **view** your referral, you can **click** on it from the list. You'll be taken to the **View Referral** screen.

The View Referral screen is non-editable and is for information only.



The screenshot shows the 'View Referral #3064' screen. The header includes 'CHS Healthcare', 'Webforms Referrals Administration', and 'Logout'. A 'Back' button is in the top right. The main content is divided into three sections: 'Patient Details', 'Referral Details', and 'Documents Submitted'. 'Patient Details' shows 'CCG/HB: NHS East Downs', 'NHS Number: 391-732-7074', and 'Date Of Birth: 28/07/1947'. 'Referral Details' shows 'Referral Type: Fast Track' and a 'Comments' section with a note that comments are added to Case Management. 'Documents Submitted' lists four PDF files: 'Consent.docx', 'Fast track.docx', 'Portal Guide - For BroadCare Administrators.pdf', and 'Portal Guide - For BroadCare Referrers.pdf'.

Please note All PDF documents that have been digitally generated within the portal will include relevant Patient Information within the header of each page.

This information is automatically generated based on the data entered into the webform used to produce the PDF document. The Personal Details section of the Webform must be completed and the Webform must be saved before the header information will be populated.

6 Completing a Digital CHC Checklist

The Digital CHC Checklist is identical to the more traditional ‘paper’ checklists.

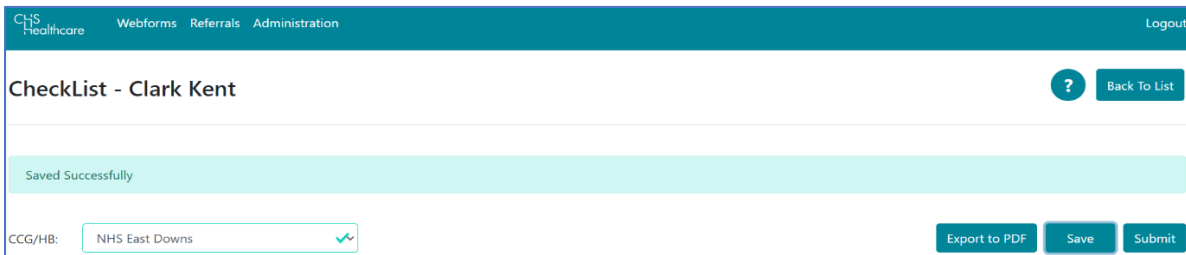
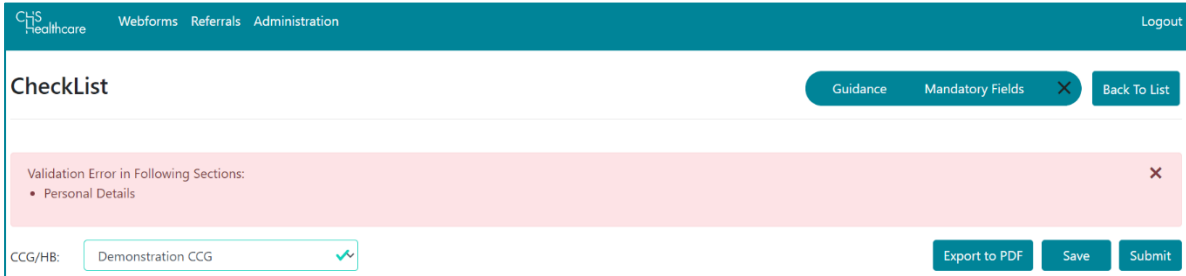
You can find the CHC Checklist guidance (the same that you would find at the start of a paper CHC Checklist) by Clicking on the ? Icon and then selecting Guidance. (This will open in PDF Format.)

You can also find guidance on the **Mandatory Fields** here. They must be completed before you can submit the Digital CHC Checklist.

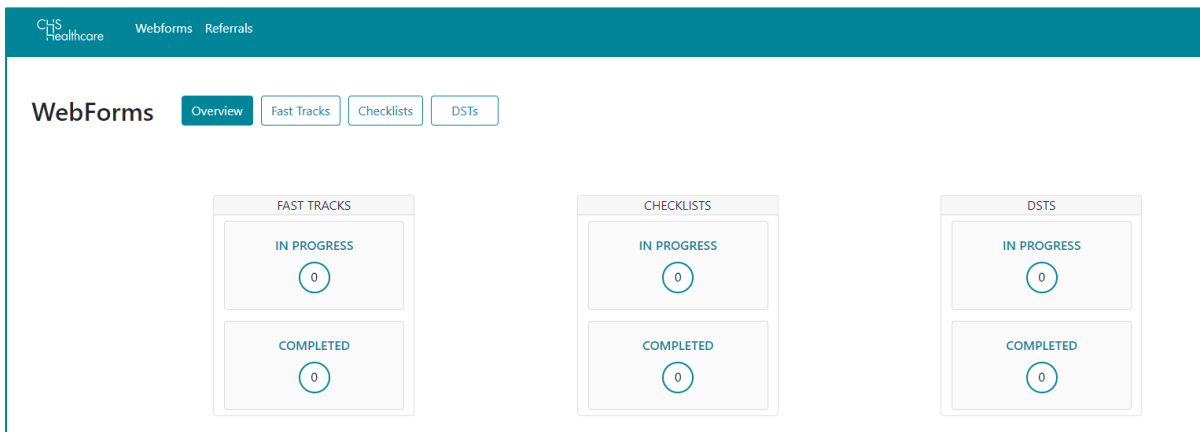
There are some generic and minimum Mandatory Fields that are set as an NHSE requirement and then there are some ICB specific Mandatory Fields.

You will also get a reminder at the top of your Digital CHC Checklist which highlights any mandatory fields that need to be completed on that part of the Digital CHC Checklist.

The Digital CHC Checklist can be saved at any time by clicking the Save button and you will receive a notification to say it has been saved successfully.

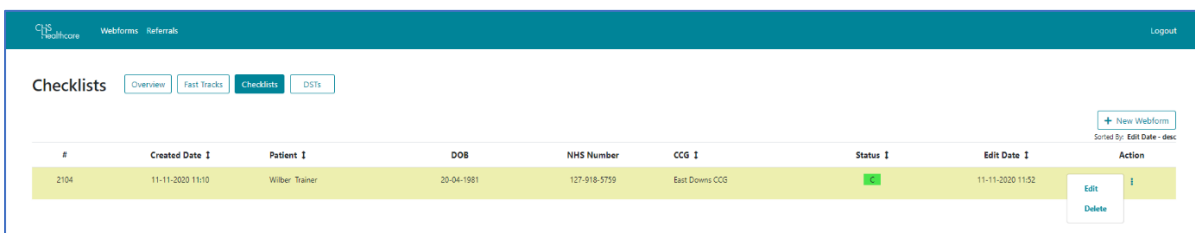


You can access the document by clicking on the Checklist In Progress section or the Checklists tab along the top.



Click **Checklists** and then click on the Action Icon (three vertical dots) for the relevant Digital CHC Checklist.

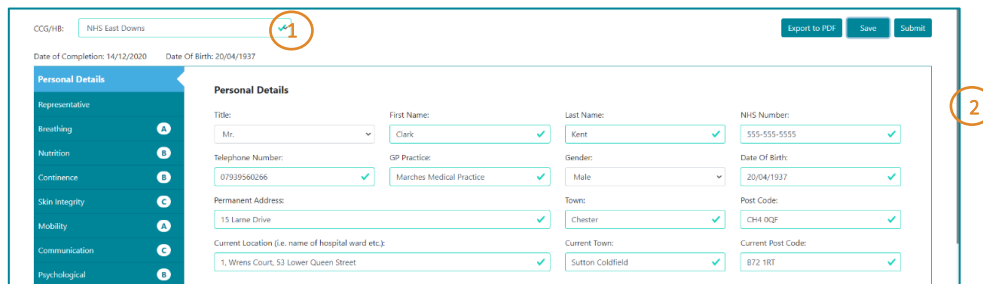
Select **Edit** from the pop-up menu to open it and resume your referral.



Personal Details

To complete a **Digital CHC Checklist** you need to:

1. Select the correct **ICB/ Health Board** from the Dropdown Menu.
2. Then complete the Patients **Personal Details** section.



The fields that you need to complete are:

- Title (via Dropdown Menu)
- First Name
- Last Name
- NHS Number
- Telephone Number
- GP Practice
- Gender (Via Dropdown Menu)
- Date of Birth
- Permanent Address, Town, & Postcode
- Current Location (i.e. name of Hospital Ward etc...), Town & Current Postcode

Once you complete the fields they will be marked with a **green tick**.

There are various validation checks that make sure that some key pieces of the information you enter is in the correct format.

After completing the Patients Personal Details, you can move on to the rest of the Digital CHC Checklist.

You navigate between the sections by simply clicking on them.

Representative

The next section is **Representative**. The Representative Section asks you a series of Yes/No Questions and for the following information about the Patients Representative (if they have one).

- Name
- Telephone Number
- Address

Complete all the information as appropriate before moving on to the next section.

Representative

Please ensure that the equally enabling items at the end of the Checklist is completed.

Use the individual indicated in the completion of the Checklist? Yes/No (Please tick Yes/No as appropriate)

Yes No

Will the individual attend the appointments to have a representative with a family member or other witness present when the Checklist has been completed? Yes/No (Please tick as appropriate)

Yes No

Will the representative attend the completion of the Checklist? Yes/No (Please tick as appropriate)

Yes No

Name of the Representative Representative Telephone Number

Name of the Representative Representative Telephone Number

Representative Address

Representative Address

Do you expect the individual from their personal information will be placed within a Patient organization involved in the care and did they consent to the information shared? Yes/No (Please tick as appropriate)

Yes No

When not to screen

There will be some situations where it is not necessary to complete the Checklist. Practitioners should ensure the statements below are when it may not be appropriate to screen for MHC Continuing Healthcare before they start the process of completing the Checklist.

The Checklist should not be necessary to complete the Checklist in the following circumstances:

- The patient is not currently living in the home and is unable to be seen by the MHC Continuing Healthcare at this point in time. If there are appropriate reasons the decision and its reasons should be recorded. If there is a doubt between practitioners the Checklist should be undertaken.
- The individual has previously had an assessment for MHC Continuing Healthcare and has not met the criteria for MHC Continuing Healthcare.
- The individual has a legally binding order and may be entering a care home or hospital placement. In these situations the 'Yes/No' pathway tool should be used instead of the Checklist.
- An individual is being treated in a hospital or care home and is not eligible for MHC Continuing Healthcare.
- An individual is being treated in a hospital or care home and is not eligible for MHC Continuing Healthcare and it is clear that there has been no change in needs.
- If it has previously been decided that the individual is not eligible for MHC Continuing Healthcare and it is clear that there has been no change in needs.

If upon review of these statements it is deemed that it is not necessary to screen for MHC Continuing Healthcare at this time, the decision not to complete the Checklist and the reasons should be clearly recorded in the patient's notes.

The 11

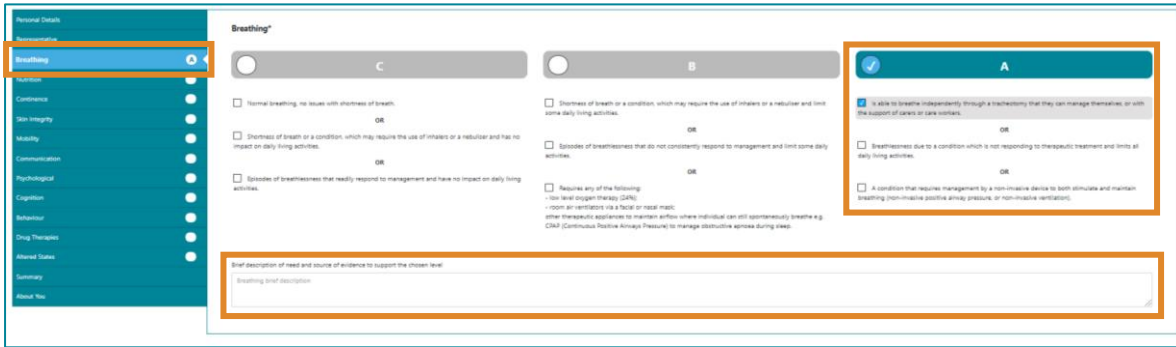
Domains

Following Representative you have the **11 Domains**:

- Breathing
- Nutrition
- Continence
- Skin Integrity
- Mobility
- Communication
- Psychological
- Cognition
- Behaviour
- Drug Therapies
- Altered States.

Each Domain section mirrors the paper checklist and automatically updates the score that you select under each of the Digital CHC Checklist sections.

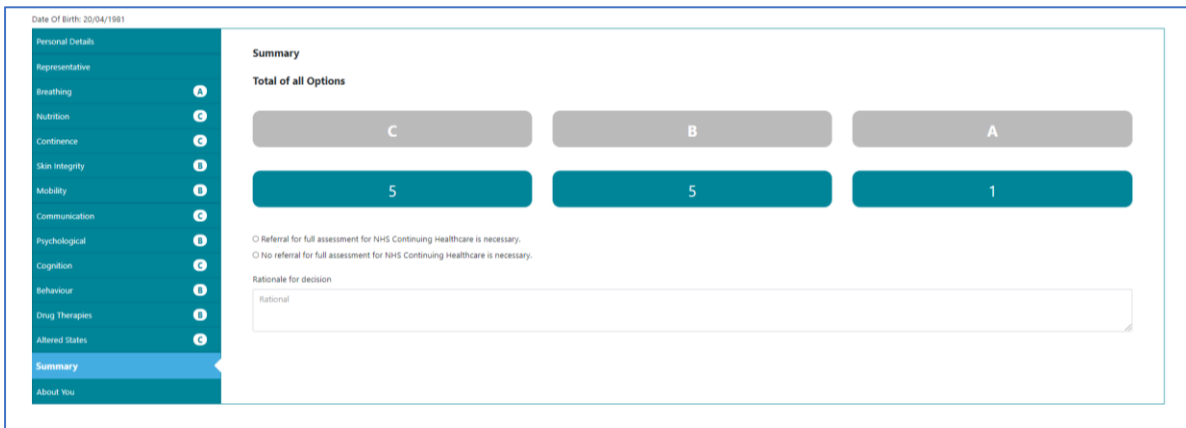
For example:



You must also **complete** the section at the bottom of the section that asks for a “Brief description of need and source of evidence to support the chosen level”.

Once you’ve completed the **11 Domains**, you’ll be presented with the **Summary** Section.

Summary



The **Summary** gives you the **total number of A, B and C scores** you have assigned the Patient across all **11 Domains** within the Digital CHC Checklist.

It allows you to select the Digital CHC Checklist outcome, by clicking the radio button next to one of the following options:

- Referral for full assessment for NHS Continuing Healthcare is necessary.
- No referral for full assessment for NHS Continuing Healthcare is necessary.

It also allows you to add your rationale for your decision.

The final section on the Digital CHC Checklist is **About You**.

About You

This still relates to the patient, and certain key demographic information will **automatically populate** within the **About You** section based on the information you added to the patients **Personal Details** section at the start of the Digital CHC Checklist.

All the options within **About You** are selected from drop-down menus.

You have the option to select **Prefer not to answer** if the patient is unwilling to provide that level of personal information about themselves.

Adding a Digital Signature

The signature section will appear once you've completed all the other sections to your Digital CHC Checklist.

As the referrer your information will populate the Signature section. It will include:

- Name
- Role
- Email
- An automatically generated Digital Signature
- Telephone Number (which is an editable field, so you can update it in necessary)

You can add an additional signatory by clicking on the **Add** button.

To add your electronic signature the Digital CHC Checklist Click **Save**.

The screenshot shows a 'Signatures' section with an 'Add' button at the top right. Below it is a form with the following fields: Name (Will Haydock), Email (will.haydock@chshealthcare.co.uk), Organisation (CHS Healthcare), Role (IT Systems Trainer), Signature (Will Haydock), and Telephone (07833127931). A 'Save' button is highlighted with an orange box.

This will add a **date of signature** and change the Save/Cancel buttons to **Edit** (Pencil) and **Delete** (Bin) icons.

The screenshot shows the 'Signatures' section after saving. The 'Save' button has been replaced by 'Edit' (pencil icon) and 'Delete' (bin icon) buttons. A new 'Date of Signature' field (11/11/2020) has been added and highlighted with an orange box.

Once you have signed the Digital CHC Checklist you are able to submit your referral.

Submitting your completed Digital CHC Checklist

Once you've fully completed a Digital CHC Checklist click **Submit**.

The screenshot shows the 'CheckList - Clark Kent' screen. It features a dropdown menu for 'CCG/HB' (NHS East Downs), a 'Date of Completion' field (14/12/2020), and a 'Date Of Birth' field (20/04/1937). The 'Submit' button is highlighted with an orange box.

You'll be taken to the **New Referral** screen.

New referral

Patient Details:

CCG/HB: * NHS Number: * Date Of Birth: *

Referral Details

Referral Type: * 1

Consent: * No file chosen 2 Webform Name: 3 Other Documents: No file chosen 4

Comments:

5

6

The **Patient Details** section will be automatically populated from the Digital CHC Checklist. The **Referral Details** section will have the following sections (some of which you can update).

1. **Referral Type** – This will automatically populate with **CHC**.
2. **Consent** – Click **Choose file** to upload the signed **Consent Document**.
3. **Webform Name** – This will automatically populate with the **Digital CHC Checklist ID**
4. **Other Documents** – Click **Choose file** to upload **all evidence to support your referral**.
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click Choose File again to add an additional Document.
 - c. Or click Choose File and then hold the Shift Key on your keyboard while selecting multiple files from the same folder
5. **Comments** – This is your opportunity to add any additional comments about your referral.
6. Click **Submit** to send your Digital CHC Referral to the ICB.

Your referral will be added to the **Referrals Screen**, and you will get the following message:

“Referral submitted successfully to <Name> CCG”

Referrals My Referrals All Referrals

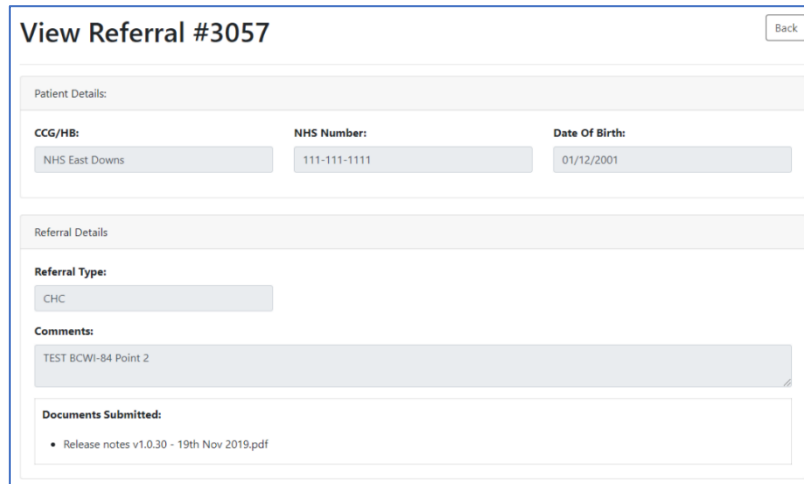
Referral submitted successfully to Demonstration CCG.

Filters: 0 Sorted By: Submitted On - desc

#	Status	CCG/HB	Referral Type	NHS Number	DOB	Submitted By	Submitted On
3078	Submitted	Demonstration CCG	DST	111-111-1111	20-04-1943	will.haydock@chshealthcare.co.uk	16-12-2020 15:23
3015	Submitted	Demonstration CCG	DST	888-888-8888	20-04-1940	will.haydock@chshealthcare.co.uk	10-12-2020 14:43

View your Referral

To **view** your referral, you can **click** on it from the list. You'll be taken to the **View Referral** screen. The View Referral screen is non-editable and is for information only.



View Referral #3057 Back

Patient Details:

CCG/HB: NHS East Downs	NHS Number: 111-111-1111	Date Of Birth: 01/12/2001
----------------------------------	------------------------------------	-------------------------------------

Referral Details

Referral Type:
CHC

Comments:
TEST BCWi-84 Point 2

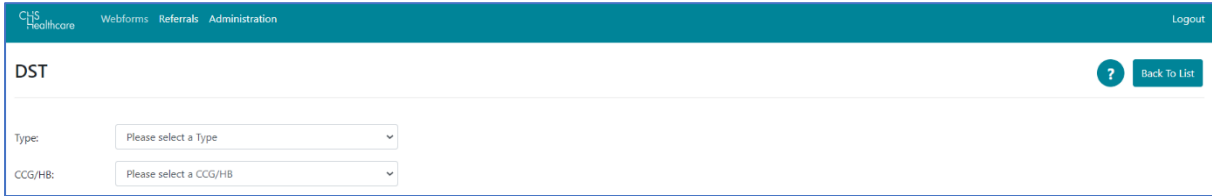
Documents Submitted:

- Release notes v1.0.30 - 19th Nov 2019.pdf

Please note All PDF documents that have been digitally generated within the portal will include relevant Patient Information within the header of each page.

This information is automatically generated based on the data entered into the webform used to produce the PDF document. The Personal Details section of the Webform must be completed and the Webform must be saved before the header information will be populated.

7 Completing a Digital DST



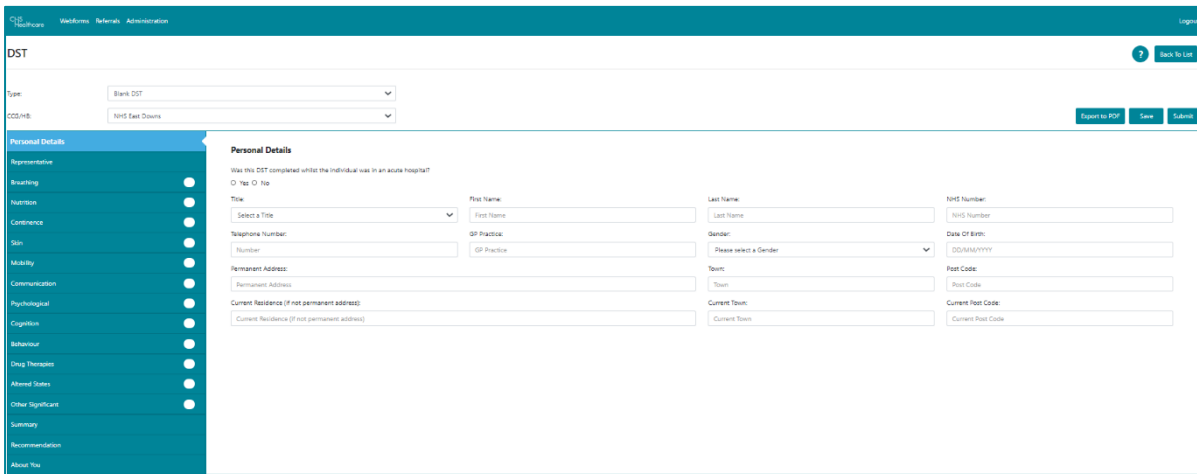
From the DST Screen, you can select the **Type** of DST you'd like to complete:

- Blank DST – an empty Digital DST.
- Annotate DST – a previously completed DST for you to annotate.
- Populate DST using Checklist Data – pull information from a completed Digital CHC Checklist into your Digital DST.

From the CCG/HB Drop-down select the ICB or Health board that you're completing the DST for.

Submitting a Blank DST

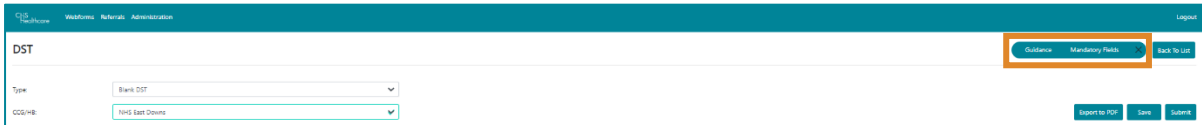
The Digital DST is identical to the more traditional 'paper' Decision Support Tool.



You can find the DST Guidance (the same that you would find at the start of a paper DST) by Clicking on the ? Icon and then selecting Guidance. (This will open in PDF Format.)



You can also find guidance on the **Mandatory Fields** here. They must be completed before you can submit the Digital DST.



There are some generic or minimum Mandatory Fields that are set as an NHSE requirement and then there are some ICB specific Mandatory Fields.

You will also get a reminder at the top of your Digital DST which highlights any mandatory fields that need to be completed on that part of the Digital DST.

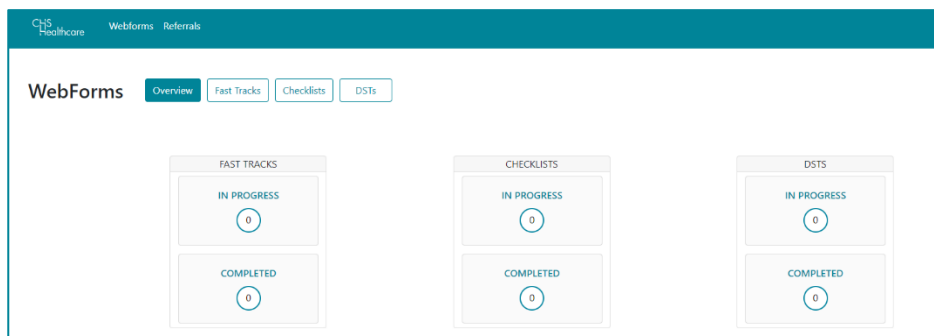


You can Save your Digital DST at any time by clicking on the **Save** Button.




You'll get a notification confirming that the Digital CHC Checklist has been **saved successfully**.

It will then appear in (and can be accessed from) the **DSTs** option on the Webforms page.



Click **DSTs** and then click on the Action Icon (three vertical dots) for the **relevant Digital DST**.

Select **Edit** from the pop-up menu to open it and resume your Digital DST.

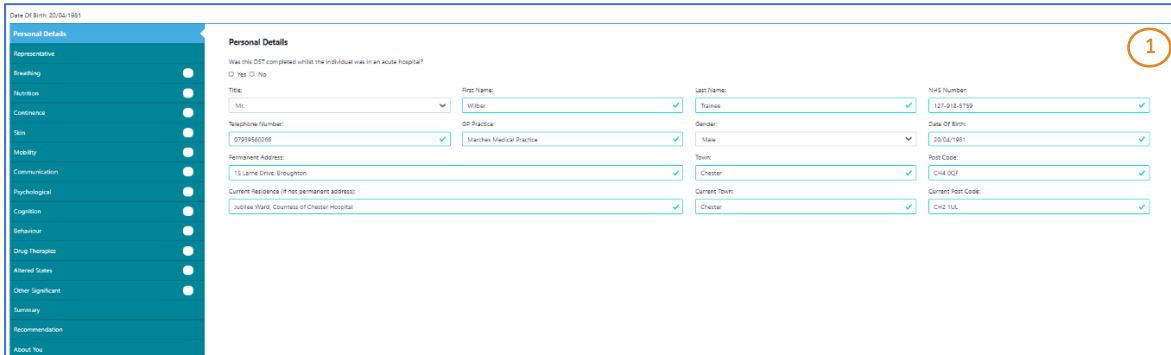


#	Created Date	Patient	DOB	NHS Number	CCG/IB	Status	Exp Date	Action
70	15-12-2020 14:33	Chuck Norris	20-04-1943	111-111-1111	Demonstration CCG	IN	16-12-2020 15:05	Edit
71	16-12-2020 09:45	Benji Sage	20-04-1987	888-888-8888	NHS East Devons	IN	16-12-2020 10:28	Edit
88	08-12-2020 15:42	Renee Berman	20-04-1987	777-777-7777	NHS East Devons	IN	16-12-2020 09:48	Edit

Personal Details

To complete a **Blank Digital DST**, you need to:

1. Complete the Patients **Personal Details** section.



Date Of Birth: 20/04/1987

Personal Details

Was this DST completed whilst the individual was in an acute hospital?
 Yes No

Title First Name Last Name NHS Number

Telephone Number GP Practice Gender Date Of Birth

Permanent Address Town Post Code

Current Residency (if not permanent address) Current Town Current Post Code

The fields that you need to complete are:

- Title (via Dropdown Menu)
- First Name
- Last Name
- NHS Number
- Telephone Number
- GP Practice
- Gender (Via Dropdown Menu)
- Date of Birth
- Permanent Address, Town, & Postcode

- Current Location (i.e. name of Hospital Ward etc...), Town & Current Postcode
- Date of completion of Decision Support Tool

Once you complete the fields they will be marked with a **green tick**.

There are various validation checks that make sure that some key pieces of the information you enter is in the correct format.

After completing the Patients Personal Details, you can move on to the rest of the Digital DST.

You navigate between the sections by simply clicking on them.

Representative

The next section is **Representative**. The Representative Section asks you a series of Yes/No Questions and for the following information about the Patients Representative (if they have one).

- Name.
- Telephone Number.
- Address.

The screenshot shows the 'Representative' section of the Digital DST form. It includes several sections with text boxes and checkboxes:

- Representative** (Section Header)
- Please ensure that if the equality monitoring form at the end of the DST is completed** (Instruction)
- Two Yes/No questions with radio button options:
 - Was the individual involved in the completion of the DST? (Yes/No)
 - Was the individual offered the opportunity to have a representative such as a family member or other advocate present when the DST was completed? (Yes/No)
- Another Yes/No question:
 - If yes, did the representative attend the completion of the DST? (Yes/No)
- Text box: **Please give the contact details of the representative (name, address and telephone number)**
- Form fields for:
 - Name of the Representative (Name and Telephone Number)
 - Representative Address
- Text box: **Summary pen portrait of the individual's situation, relevant history (particularly clinical history) and current needs, including clinical summary and identified significant risks, drawn from the multidisciplinary assessment**
- Text box: **Individual's view of their care needs and whether they consider that the multidisciplinary assessment accurately reflects these**
- Text box: **Please note below whether and how the individual or their representative contributed to the assessment of their needs. If they were not involved, please note whether they were not invited or whether they declined to participate**
- Text box: **Please list the assessments and other key evidence that were taken into account in completing the DST, including the dates of the assessments and other key evidence**
- Text box: **Assessor (including MDT member name/address/contact details including lead coordinator)**
- Form fields for Assessor:
 - Assessor Name (Name and Contact Number)
 - Assessor Address (Address and Email)
- Text box: **Additional Assessor Information**
- Text box: **Contact details of GP and other key professionals involved in the care of the individual. Please indicate which of these have contributed to the assessment of needs for the MDT to consider when completing the Decision Support Tool**
- Text box: **Contact details**

Additionally, it asks the following questions:

- a) Summary pen portrait of the individual's situation, relevant history (particularly clinical history) and current needs, including clinical summary and identified significant risks, drawn from the multidisciplinary assessment.

- Individual's view of their care needs and whether they consider that the multidisciplinary assessment accurately reflects these.
- b) Please note below whether and how the individual (or their representative) contributed to the assessment of their needs. If they were not involved, please record whether they were not invited or whether they declined to participate.
- Please list the assessments and other key evidence that were considered in completing the DST, including the dates of the assessments.
- c) Assessors' (including MDT members) name/address/contact details noting lead coordinator.
- Assessors Name.
 - Assessors Contact Number.
 - Assessors Email.
 - Assessors Address.
 - Additional Assessors Information.
 - Contact details of GP and other key professionals involved in the care of the Individual.

Much like the more traditional paper DSTs it is vital to input all information required as accurately as possible.

After you have completed the Representative section, you can move on to complete each of the 12 Domains.

The 12 Domains

Following Representative, you have the **12 Domains Sections**:

- Breathing
- Nutrition
- Continence
- Skin Integrity
- Mobility
- Communication
- Psychological
- Cognition
- Behaviour
- Drug Therapies
- Altered States.
- Other Significant

Each Domain section mirrors the paper DS' and automatically updates the score that you select under each of the Digital DST sections.

For example:

You must **complete** the section at the top of the section that asks you to:

“Describe below the actual needs of the individual, providing the evidence that informs the decision overleaf on which level is appropriate, including the frequency and intensity of need, unpredictability, deterioration and any instability”.

To select the level of severity for each Domain, click on the **Arrow** to expand it and select the **relevant option** within the menu.

The exception to this is the final Domain section **Other Significant**.

Other Significant asks you to select the severity by clicking on it and then provide a **detailed description** of what other significant care need(s) the patient has.

Once you've completed each of the **12 Domains** in this way, you'll be presented with the **Summary Section**.

Summary

The **Summary** shows the severity need for the patient under of each domain as you have scored them in the Digital DST.

It allows you to add any additional views about the completion of the Digital DST that you were unable to record under each of the domains.

Summary

Total of all Care Domains

Priority	Severe	High	Moderate	Low	No needs
0	1	1	5	2	3

Care Domain	Priority	Severe	High	Moderate	Low	No needs
Breathing						
Nutrition- Food and Drink				✓	✓	
Continence						✓
Skin (including tissue viability)				✓		
Mobility			✓			
Communication					✓	
Psychological and Emotional Needs				✓		
Cognition		✓				
Behaviour						✓
Drug Therapies and Medication				✓		
Altered State of Consciousness					✓	✓
Other significant care needs				✓		

Please note below any views of the individual on the completion of the DST that have not been recorded above, including whether they agree with the domain levels selected. Where they disagree, their understanding of the reasons for their disagreement. Where the individual is represented or supported by a carer or advocate, their understanding of the individual's views should be recorded.

Individual's View

After adding your views, you can move on to the **Recommendation** section of the Digital DST.

Recommendation

Recommendation of the multidisciplinary team filling in the DST

Please refer to the user notes

Please give a recommendation on the next page as to whether or not the individual is eligible for NHS Continuing Healthcare. This should take into account the range and levels of need recorded in the Decision Support Tool and what this tells you about whether the individual has a primary health need. Any disagreement on needs and/or areas where needs have been recorded against more than one domain should be highlighted here. Justifying a recommendation on whether the individual's primary needs are health needs should include consideration of:

- Nature:** This describes the particular characteristics of an individual's needs (which can include physical, mental health, or psychological needs), and the type of those needs. This also describes the overall effect of those needs on the individual, including the type (quality) of interventions required to manage them.
- Intensity:** This refers to both the extent (quantity) and severity (degree) of the needs and the support required to meet them, including the need for sustained or ongoing care (continuity).
- Complexity:** This is concerned with how the needs present and interact to increase the difficulty required to manage the symptoms, meet the individual's and/or manage the care. This may arise with a single condition or it should include the presence of multiple conditions or the interaction between two or more conditions. It may also include situations where an individual's responses to their own condition have impacted on their overall health, such as when a physical health need leads to the clinical development of a mental health need.
- Unpredictability:** This describes the degree to which needs fluctuate and thereby create challenges in managing them. It also refers to the mix of risk to the individual's health (if applicable and safety) care is not provided. An individual with an unpredictable healthcare need is likely to have either a fluctuating, variable or rapidly deteriorating condition.

Each of these characteristics may, alone or in combination, demonstrate a primary health need because of the quality and/or quantity of care that is required to meet the individual's needs. The severity of the overall needs and the effects of the interaction of needs should be carefully considered when completing the DST. Any change indicates specific needs are expected to change in terms of deterioration or improvement) before the date is not recorded. It is clear state any and what needs you think will be different and whether you are recommending that eligibility should be agreed on or that a new review date should be set. Where there is no eligibility for NHS Continuing Healthcare and the assessment and care plan, an agreed with the individual. Indicate the need for support in a care home setting, the team should include whether there is the need for registered nursing care in the care home, giving a clear rationale based on the evidence above.

Recommendation is eligible for NHS Continuing Healthcare under the conditions on the tool. This should include the following headings:
Overview Nature Intensity Complexity Unpredictability and Recommendation.

Recommendation:

Date of agreed DST recommendation: [Field]

CCU use only: Date of Eligibility Decision/Verification: [Field]

The **Recommendation** section asks you to provide your recommendation on the patient’s eligibility for NHS Continuing Healthcare.

Specifically detailing the conclusions on the issues, you have identified in the DST.

It should include the following headings:

- An **Overview**.
- **Nature**.
- **Intensity**.
- **Complexity**.
- **Unpredictability**.
- And finally, your **Recommendation**.

It also has two date fields to be completed:

Date of agreed MDT recommendation:	DD/MM/YYYY
for CCG use only: Date of Eligibility Decision/Verifications:	DD/MM/YYYY

- Date of agreed MDT recommendation. (This will need to be completed before you can proceed).
- Date of Eligibility Decision/Verification (for ICB use only).

Once you’ve completed the recommendation section, you can move on to **About You**.

About You

This still relates to the patient, and certain key demographic information will **automatically populate** within the **About You** section based on the information you added to the patients **Personal Details** section at the start of the Digital DST.

All the options within **About You** are selected from drop-down menus.

You have the option to select 'Prefer not to answer' if the patient is unwilling to provide that level of personal information about themselves.

Adding a Digital Signature

The signature section will appear once you've completed all the other sections to your Digital DST.

The screenshot displays the 'Signatures' section of the referral portal. On the left is a teal sidebar with a list of categories: Personal Details, Representative, Breathing (M), Nutrition (L), Continence (N), Skin (M), Mobility (H), Communication (L), and Psychological (M). The main content area is titled 'Signatures of MDT making above recommendation:' and features a form with the following fields: Name (Will Haydock), Email (will.haydock@chshealthcare.co.uk), Designation (IT Systems Trainer), Professional Qualifications, Signature (Will Haydock), Telephone (07833127931), and Type (Please select a Type). There are 'Save' and 'Cancel' buttons next to the Designation field, and an 'Add' button in the top right corner of the form area.

As the referrer your information will populate the Signature section. It will include:

- Name.
- Role.
- Email.
- Professional Qualification.
- An automatically generated Digital Signature.
- Telephone Number (which is an editable field, so you can update it in necessary).
- Type – a drop down menu with the options:
 - Health Professionals.
 - Social Care/Other Professionals.

You can add an additional signatory by clicking on the **Add** button.

This will open a blank signatory box, which you can fill in.

The additional signatory must authorise their digital signature, so the Digital DST will generate a **PIN Number** and send it to the email address of the additional Signatory.

1. Click Request PIN.

This will send the Additional Signatory an email with their PIN. The Email will state:

“You have been sent a verification email from the CHS Referral Portal for Webform ID 2162. Please see your verification code:..”

The PIN will be included.

Once the additional Signatory has entered their PIN, they need to click **OK** and then **Save**.

To add your electronic signature the Digital DST Click **Save**.

The screenshot shows a 'Signatures' form with the following fields: Name (Will Haydock), Email (will.haydock@chshealthcare.co.uk), Designation (IT Systems Trainer), Professional Qualification (PHD), Signature (Will Haydock), Telephone (07833127931), and Type (Health professionals). The 'Save' and 'Cancel' buttons are highlighted with an orange box.

This will add a **date of signature** and change the Save/Cancel buttons to **Edit** (Pencil) and **Delete** (Bin) icons.

The screenshot shows the 'Signatures' form after saving. The 'Save' and 'Cancel' buttons have been replaced with 'Edit' (pencil icon) and 'Delete' (bin icon) buttons. A new 'Date of Signature' field has been added, containing the date '11/11/2020'. The 'Save' and 'Cancel' buttons from the previous screenshot are also highlighted with an orange box.

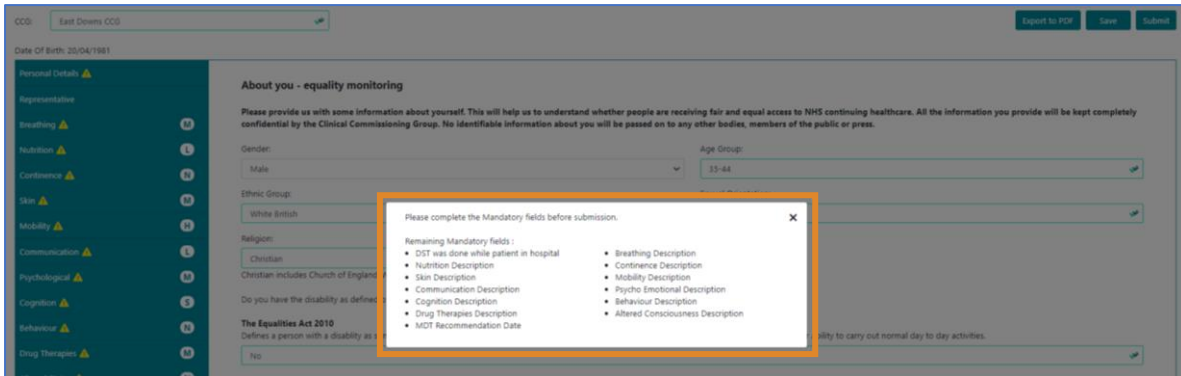
Once you've signed the Digital DST, you're able to submit your referral.

Submitting your completed Digital DST

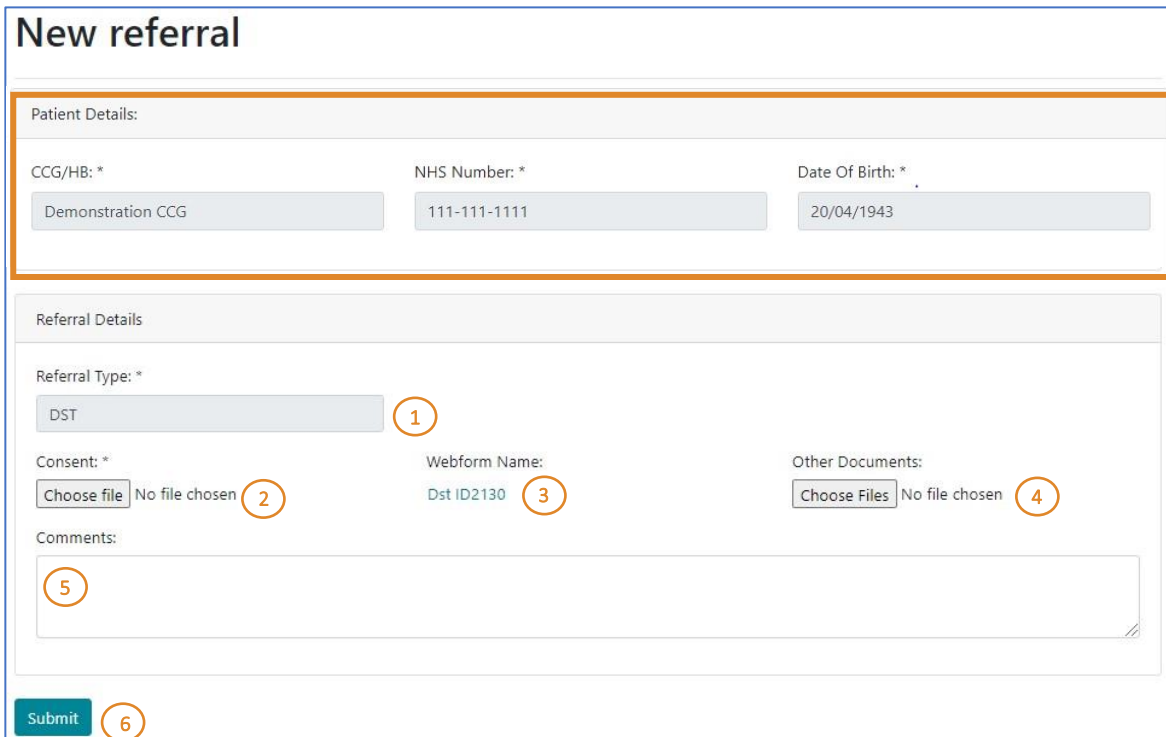
Once you've fully completed a Digital DST click **Submit**.

The screenshot shows the 'DST - Chuck Norris' form. The 'Submit' button is highlighted with an orange box. The form includes a 'Back to List' button and a 'Reset to DST' button.

If you're missing any key information the system will notify you with a pop-up box detailing what you've missed.



Otherwise, you'll be taken to the **New Referral** screen.



The **Patient Details** section will be automatically populated from the Digital DST. The **Referral Details** section will have the following sections (some of which you can update).

1. **Referral Type** – This will automatically populate with **CHC/HB**.
2. **Consent** – Click **Choose file** to upload the signed **Consent Document**.
3. **Webform Name** – This will automatically populate with the **Digital DST ID**.

4. **Other Documents** – Click **Choose file** to upload **all evidence to support your referral**.
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click **Choose File** again to add an additional Document.
 - c. Or click **Choose File** and then hold the ‘**Shift Key**’ on your keyboard while selecting multiple files from the same folder
5. **Comments** – This is your opportunity to add any additional comments about your Digital DST.
6. Click **Submit** to send your Digital DST to the CCG.

Your Digital DST will be added to the **Referrals Screen**, and you will get the following message:

“Referral submitted successfully to <Name> CCG”

The screenshot shows the 'Referrals' screen with a 'New Referral' button in the top right. A light green message box states 'Referral submitted successfully to East Downs CCG.' Below this is a filter bar showing 'Filters: 0'. The table is sorted by 'Submitted On - desc' and contains one entry:

#	Status ↓	CCG ↓	Referral Type ↓	NHS Number	DOB	Submitted By ↓	Submitted On ↓
3383	Submitted to CCG	East Downs CCG	CHC	127-918-5759	20-04-1981	will.haydock@chshealthcare.co.uk	11-11-2020 13:05

View your Digital DST

To **view** your Digital DST, you can **click** on it from the list.

The screenshot shows the 'DSTs' screen with a 'Saved Successfully' message. The table below lists several Digital Standard Templates:

#	Created Date ↓	Patient ↓	DOB	NHS Number	CCG/IB ↓	Status ↓	Edit Date ↓	Action
73	15-10-2020 14:33	Chuck Harris	20-04-1983	111-111-1111	Derwentham CCG	✓	16-10-2020 16:01	⌵
71	16-10-2020 09:45	Sharon Sagar	20-04-1987	000-000-0000	NHS East Downs	✓	16-10-2020 10:23	⌵
65	09-10-2020 15:42	Ranikh Baniyan	20-04-1987	777-777-7777	NHS East Downs	✓	16-10-2020 09:45	⌵

You'll be taken to the **View Referral** screen. The View Referral screen is non-editable and is for information only.

View Referral #3067

Back

Patient Details:

CCG/HB:	NHS Number:	Date Of Birth:
NHS East Downs	673-274-9110	06/02/1974

Referral Details

Referral Type:	Webform Name:
DST	Dst ID68

Comments:

comments

Documents Submitted:

- Consent.docx
- Dst ID68.pdf
- Portal Guide - For BroadCare Administrators.pdf
- Portal Guide - For BroadCare Dashboard.pdf
- Portal Guide - For BroadCare Referrers.pdf

Please note All PDF documents that have been digitally generated within the portal will include relevant Patient Information within the header of each page.

This information is automatically generated based on the data entered into the webform used to produce the PDF document. The Personal Details section of the Webform must be completed and the Webform must be saved before the header information will be populated.

8 Completing an Annotated DST

It's important to note that when annotating an already submitted Digital DST you cannot change the ICB that it has been submitted to. If you need to complete a Digital DST for the patient at a new CCG/HB then you'll need to create a new (blank) Digital DST.

To access a Digital DST to Annotate, you'll need to Enter the **NHS Number** of the patient who is the subject of the Digital DST.

Once you've added the NHS Number, click **Submit**.

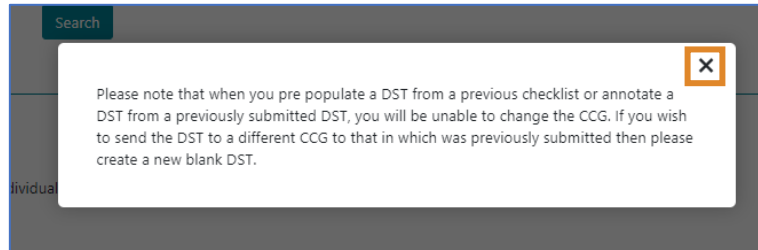
The Portal will search for the NHS Number and check that against your access permissions. If you don't have access to the CCG/HB that the Digital DST was submitted to, you'll receive the following pop-up message.

WebForm ID	Submission Date	PatientID
774	03/11/2020	5623

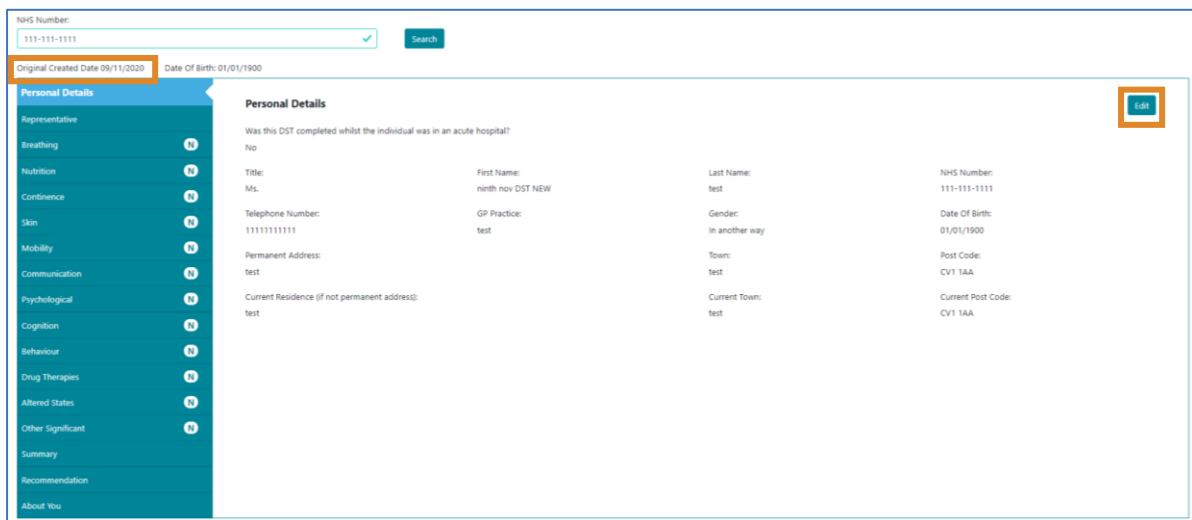
When you have access to the CCG, you'll get the following pop-up box, you can then select the correct DST.

Name	DOB	NHS Number	WebForm ID	Submission Date	PatientID	Action
ninth nov test	01/01/1900	111-111-1111	2052	09/11/2020	1	⊞
ninth nov DST NEW test	01/01/1900	111-111-1111	2069	09/11/2020	419039	⊞

You will be taken to the Digital DST and be presented with the following reminder:



Once you've read it, simply click on the **X** in the top right corner of the pop-up box to close it. You'll then be taken to the Digital DST.



NHS Number: 111-111-1111 Search

Original Created Date 09/11/2020 Date Of Birth: 01/01/1900

Personal Details Edit

Representative: No

Was this DST completed whilst the individual was in an acute hospital? No

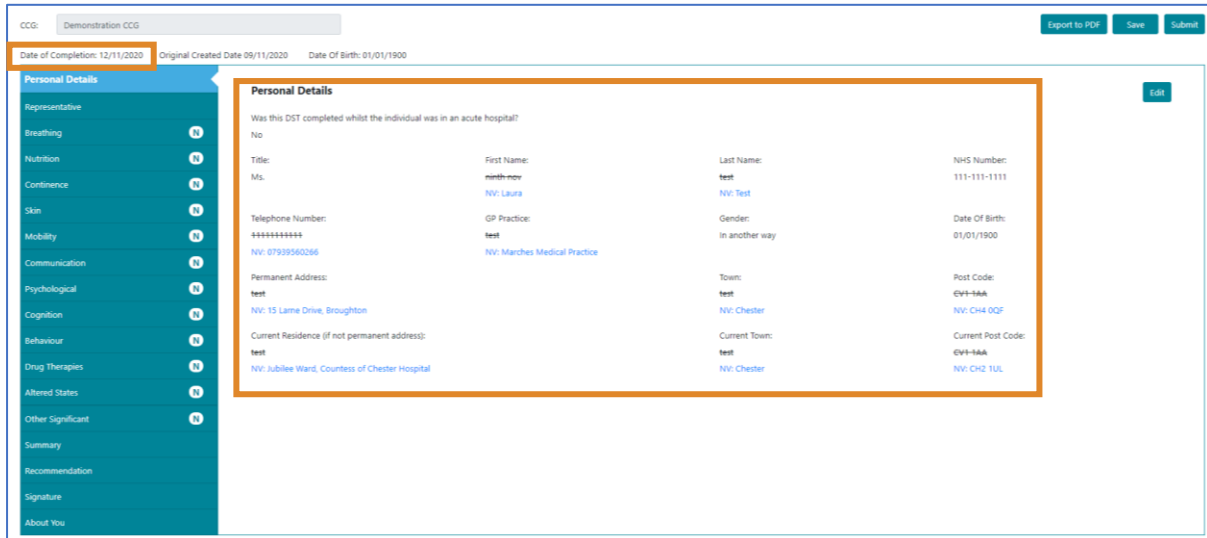
Title: Ms.	First Name: ninth nov DST NEW	Last Name: test	NHS Number: 111-111-1111
Telephone Number: 1111111111	GP Practice: test	Gender: In another way	Date Of Birth: 01/01/1900
Permanent Address: test		Town: test	Post Code: CV1 1AA
Current Residence (if not permanent address): test		Current Town: test	Current Post Code: CV1 1AA

Personal Details sidebar categories: Breathing (N), Nutrition (N), Continence (N), Skin (N), Mobility (N), Communication (N), Psychological (N), Cognition (N), Behaviour (N), Drug Therapies (N), Altered States (N), Other Significant (N), Summary, Recommendation, About You

You will be able to see all of the information that was previously populated into the Digital DST.

Each Section within the Digital DST will now also include **The original date the Digital DST was created** and an **Edit** button.

Click the **Edit** button in each section to **make any changes or additions** to the Digital DST.



CCG: Demonstration CCG

Date of Completion: 12/11/2020 Original Created Date 09/11/2020 Date Of Birth: 01/01/1900

Export to PDF Save Submit

Personal Details

Was this DST completed whilst the individual was in an acute hospital?
No

Title: ~~test~~ First Name: ~~test~~ Last Name: ~~test~~ NHS Number: 111-111-1111
 Ms: ~~test~~ Nv: Laura Nv: Test
 Telephone Number: 4444444444 GP Practice: ~~test~~ Nv: Maches Medical Practice Date Of Birth: 01/01/1900
 Nv: 07939560286 Nv: Chester In another way
 Permanent Address: ~~test~~ Town: ~~test~~ Post Code: ~~EW4 4AA~~
 Nv: 15 Larne Drive, Broughton Nv: Chester Nv: CH4 0QP
 Current Residence (if not permanent address): ~~test~~ Current Town: ~~test~~ Current Post Code: ~~EW4 4AA~~
 Nv: Jubilee Ward, Countess of Chester Hospital Nv: Chester Nv: CH2 1UL

Personal Details

Representative

Breathing

Nutrition

Continence

Skin

Mobility

Communication

Psychological

Cognition

Behaviour

Drug Therapies

Altered States

Other Significant

Summary

Recommendation

Signature

About You

Edit

Any changes/updates you make to the Digital DST will be highlighted in **blue** and the original information will be **crossed-out**, but still visible.

This allows you to Track any changes/updates you make.

The Annotated Digital DST will also add a **Date of Completion**. Showing the date that you completed your annotation.

Simply **navigate between the sections** that you need to annotate by **clicking on them**.

Click **Edit** to make the necessary changes/updates.

The sections available for edit are:

- Personal Details.
- Representative.
- All of the 12 Domains.
- The individual Views element of the Summary.
- Recommendation.
- About You.

Here is an example of how an updated **Domain** will appear:

The screenshot displays the 'Breathing' assessment form. On the left is a sidebar with categories: Personal Details, Representative, Breathing (selected), Nutrition, Continence, Skin, Mobility, Communication, Psychological, Cognition, Behaviour, Drug Therapies, Altered States, Other Significant, Summary, Recommendation, Signature, and About You. The main content area is titled 'Breathing' and includes instructions: 'Please refer to the user notes', 'PV Option: No needs', 'PV SubOptions: Normal breathing, no issues with shortness of breath.', and a paragraph explaining the domain's use. Below this are instructions: '1. Describe below the actual needs of the individual, providing the evidence that informs the decision overleaf on which level is appropriate, including the frequency and intensity of need, unpredictability, deterioration and any instability.' and '2. Circle the assessed level below.' A text input field contains 'test' and has an undo icon. Below the input field are radio button options: 'No needs', 'Low', 'Moderate' (selected), 'High', 'Severe', and 'Priority'. The 'Moderate' option is expanded to show two sub-options: 'Shortness of breath or a condition which may require the use of inhalers or a nebuliser and limit some daily living activities.' and 'Episodes of breathlessness that do not consistently respond to management and limit some daily living activities.', with the second option checked. There are also 'OR' labels between the sub-options and between the 'Moderate' and 'High' options.

The **previous selection** will appear at the top of the screen.

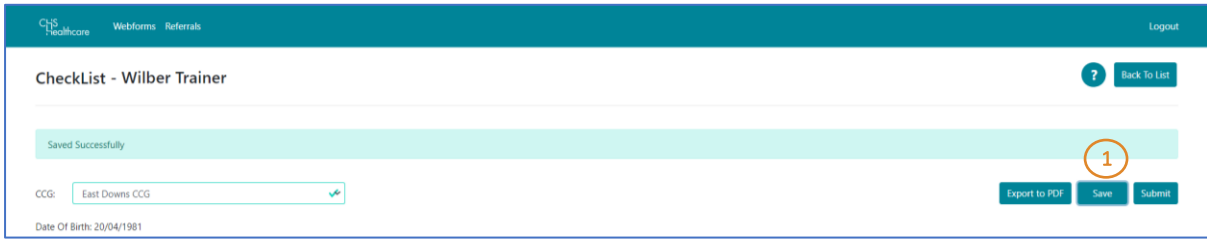
The **original description** of the actual needs of the patient will appear ~~crossed out~~. You can revert back to that description by clicking the undo **Arrow** Icon.

Your new selection will update the 'score' in the sections menu on the left of the screen.

Saving the Annotated DST

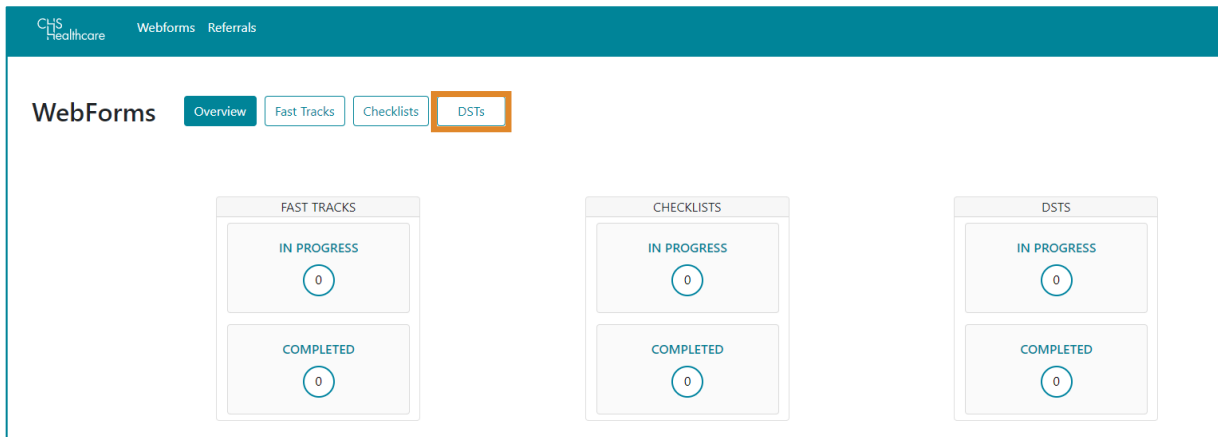
Any changes or updates you make to the Annotated DST are saved automatically while your in the Digital DST, however if you need to leave the Digital DST or the Portal before you have finished, you should save it properly.

1. You can save your Annotated Digital DST at any time by clicking on the **Save** Button.



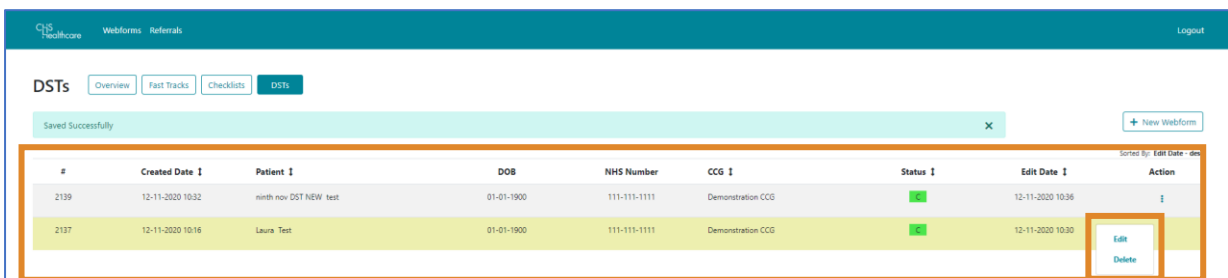
You'll get a notification confirming that the Annotated Digital DST has been **saved successfully**.

It will then appear in (and can be accessed from) the **DSTs** option on the Webforms page.



Click **DSTs** and then click on the Action Icon (three vertical dots) for the **relevant Digital DST**.

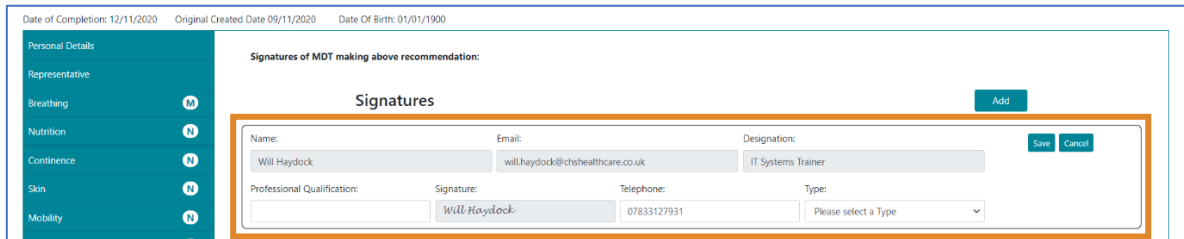
Select Edit from the pop-up menu to open it and resume your Digital DST.



Submitting the Annotated Digital DST

To submit your newly Annotated Digital DST you will need to electronically sign it.

The signature section is located between the Recommendation and About You Sections of the Annotated Digital DST. (This is because it would have been signed when it was originally submitted.)



Date of Completion: 12/11/2020 Original Created Date 09/11/2020 Date Of Birth: 01/01/1900

Personal Details

Representative

Breathing **M**

Nutrition **N**

Continence **N**

Skin **N**

Mobility **N**

Signatures of MDT making above recommendation:

Signatures Add

Name: Will Haydock Email: will.haydock@chshealthcare.co.uk Designation: IT Systems Trainer Save Cancel

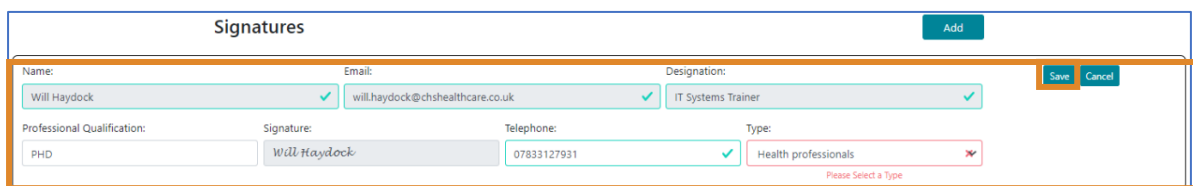
Professional Qualification: Signature: Will Haydock Telephone: 07833127931 Type: Please select a Type

Your information will automatically populate the Signature section. It will include:

- Name.
- Role.
- Email.
- Professional Qualification (this will be blank, so you need to add your qualification).
- An automatically generated Digital Signature.
- Telephone Number (which is an editable field, so you can update it in necessary).
- Type – a drop down menu with the options:
 - Health Professionals.
 - Social Care/Other Professionals.

You can add an additional signatory by clicking on the **Add** button.

To add your electronic signature the Digital DST Click **Save**.



Signatures Add

Name: Will Haydock ✓ Email: will.haydock@chshealthcare.co.uk ✓ Designation: IT Systems Trainer ✓ Save Cancel

Professional Qualification: PHD Signature: Will Haydock Telephone: 07833127931 ✓ Type: Health professionals Please Select a Type

This will add a **date of signature** and change the Save/Cancel buttons to **Edit** (Pencil) and **Delete** (Bin) icons.

Signatures Add

Name: Will Haydock | Email: will.haydock@chshealthcare.co.uk | Designation: IT Systems Trainer

Professional Qualification: PHD | Signature: Will Haydock | Telephone: 07833127931 | Type: Health professionals | Date: 11/11/2020

Once you have signed the Annotated Digital DST your able to submit it to the CCG.
Click **Submit**.

DST - Chuck Norris

CCG/Hub: Demonstration CCG

Date Of Birth: 20/04/1943

Export to PDF | **Submit**

You will be taken to the **New Referral** screen.

New referral

Patient Details:

CCG/Hub: * Demonstration CCG | NHS Number: * 111-111-1111 | Date Of Birth: * 20/04/1943

Referral Details

Referral Type: * DST (1)

Consent: * Choose file No file chosen (2) | Webform Name: Dst ID2130 (3) | Other Documents: Choose Files No file chosen (4)

Comments: (5)

Submit (6)

The **Patient Details** section will be automatically populated

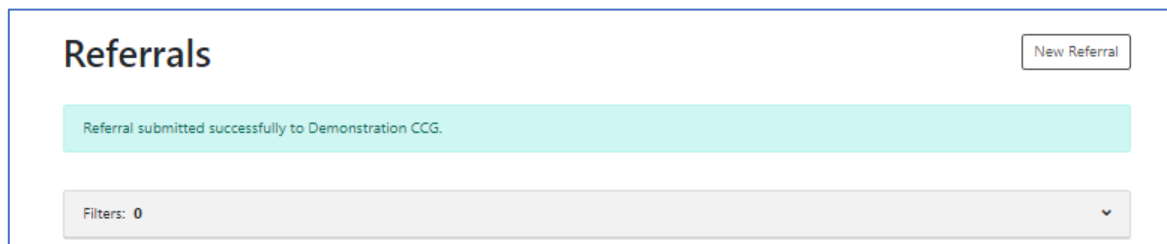
The **Referral Details** section will have the following sections (some of which you can update).

1. **Referral Type** – This will automatically populate with **CHC**.
2. **Consent** – Click **Choose file** to upload the signed **Consent Document**.
3. **Webform Name** – This will automatically populate with the **Digital DST ID**.
4. **Other Documents** – Click **Choose file** to upload **all evidence to support your referral**.
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click **Choose File** again to add an additional Document.

- c. Or click Choose File and then hold the 'Shift Key' on your keyboard while selecting multiple files from the same folder.
5. **Comments** – This is your opportunity to add any additional comments about your referral.
6. Click **Submit** to send your Digital CHC Referral to the CCG.

Your referral will be added to the **Referrals Screen**, and you will get the following message:

“Referral submitted successfully to <Name> CCG”



View your Annotated Digital DST

To **view** your Annotated Digital DST, you can **click** on it from the list.

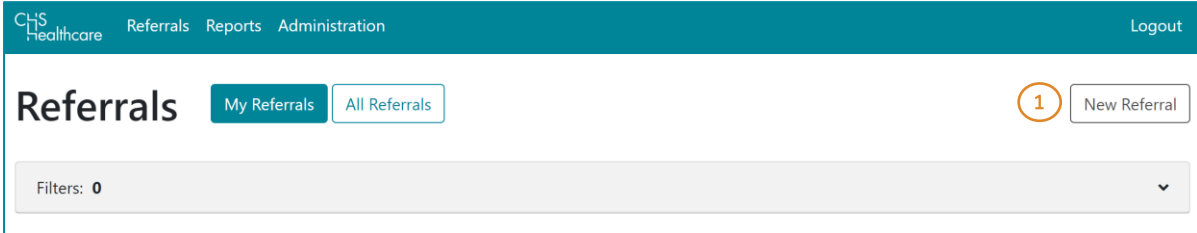
You will be taken to the **View Referral** screen. The View Referral screen is non-editable and is for information only.

9 Completing a Non-Digital Fast Track Referral

A CHC Referral can be submitted to any of the ICBs you are registered for.

Click onto the Referrals box from the Dashboard as per point 2 above

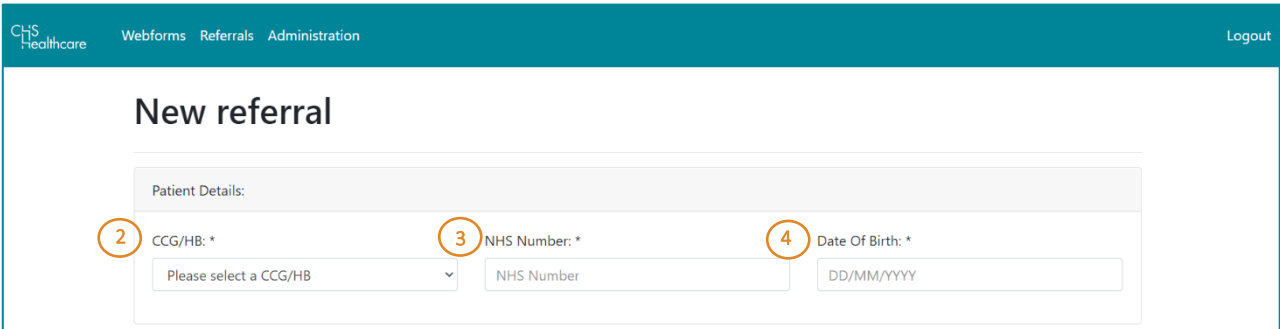
1. Click 'New Referral'.



When creating a referral to submit, there are two sections that need to be completed: **Patient Details** and **Referral Details**.

The Patient Details section include the basic demographic information regarding the patient, ***The fields that are mandatory are highlighted with an Asterix (*).**

2. Enter the CCG/ Health Board you are submitting the Referral to
3. Enter the Patients NHS Number
4. Enter the Patients DOB



Referral Details

5. From Referral Type > Choose **Fast Track**
6. Click Choose File to Upload the Consent document (if applicable)
7. Click Choose File to Upload the **Fast Track Pathway** document
8. Click Choose File to Upload any Other Documents to support the Referral
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click Choose File again to add an additional Document.
 - c. Or click Choose File and then hold the Shift Key on your keyboard while selecting multiple files from the same folder
9. Add any additional comments in support of the Referral
10. Click Submit

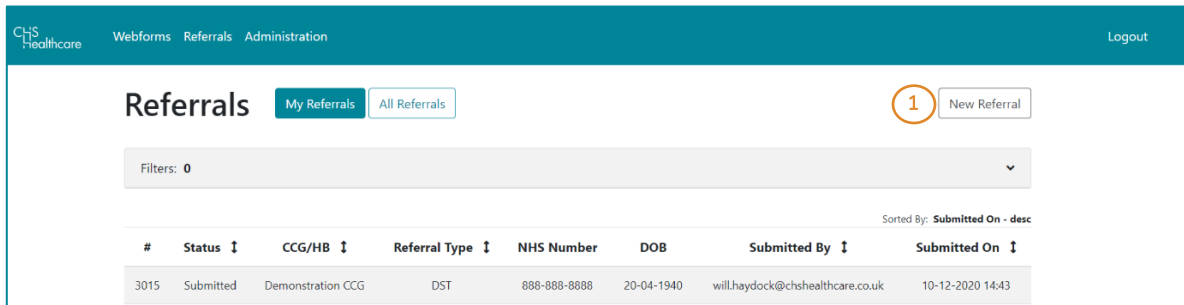
The screenshot shows a web form titled "Referral Details". At the top, there is a dropdown menu for "Referral Type:" with "Fast Track" selected, marked with a circled 5. Below this are three file upload sections: "Consent:" with a "Choose File" button and "No file chosen" text (marked with a circled 6), "Fast Track Pathway Tool: *" with a "Choose File" button and "No file chosen" text (marked with a circled 7), and "Other Documents:" with a "Choose Files" button and "No file chosen" text (marked with a circled 8). Below these is a large text area for "Comments:" (marked with a circled 9). At the bottom left is a blue "Submit" button (marked with a circled 10).

10 Completing a Non-Digital CHC Referral

A CHC Referral can be submitted to any of the ICBs you are registered for.

Click onto the Referrals box on the Dashboard

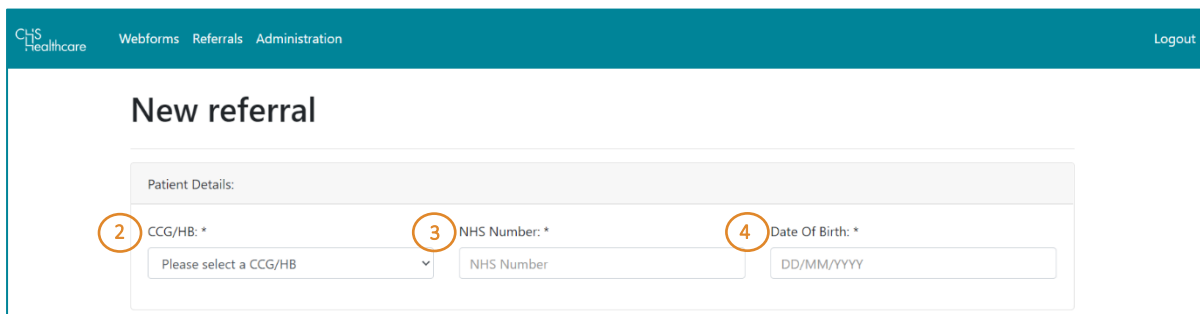
1. Click 'New Referral'.



When creating a referral to submit, there are two sections that need to be completed: **Patient Details** and **Referral Details**.

The Patient Details section include the basic demographic information regarding the patient, ***The fields that are mandatory are highlighted with an asterisk (*)**.

2. Enter the CCG/ Health Board you are submitting the Referral to
3. Enter the Patients NHS Number
4. Enter the Patients DOB



Referral Details

5. From Referral Type > Choose CHC
6. Click Choose File to Upload the Consent document (if applicable)
7. Click Choose File to Upload the Checklist document
8. Click Choose File to Upload any Other Documents to support the Referral
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click Choose File again to add an additional Document.
 - c. Or click Choose File and then hold the 'Shift Key' on your keyboard while selecting multiple files from the same folder
9. Add any additional comments in support of the Referral
10. Click Submit

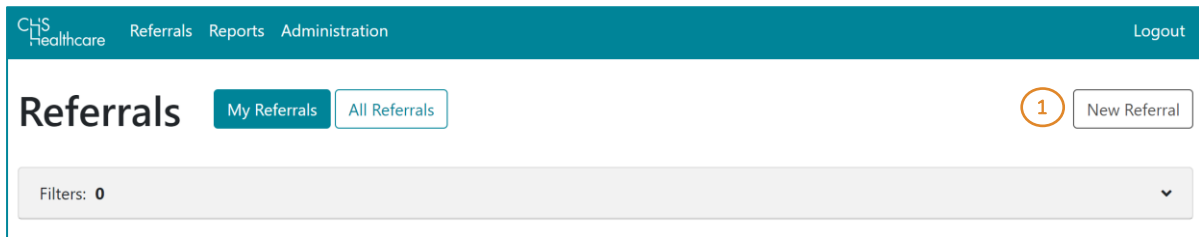
The screenshot shows a web form titled "Referral Details". At the top, there is a dropdown menu for "Referral Type:" with "CHC" selected, marked with a circled 5. Below this are three file upload sections: "Consent: *" with a "Choose file" button and "No file chosen" text (marked with a circled 6), "Checklist: *" with a "Choose file" button and "No file chosen" text (marked with a circled 7), and "Other Documents:" with a "Choose Files" button and "No file chosen" text (marked with a circled 8). Below these is a "Comments:" label (marked with a circled 9) and a large text area. At the bottom left is a blue "Submit" button (marked with a circled 10).

11 Completing a Non-Digital DST

A DST can be submitted to any of the ICBs you are registered for.

Click onto the Referrals box from the Dashboard as per point 2 of Section 4.

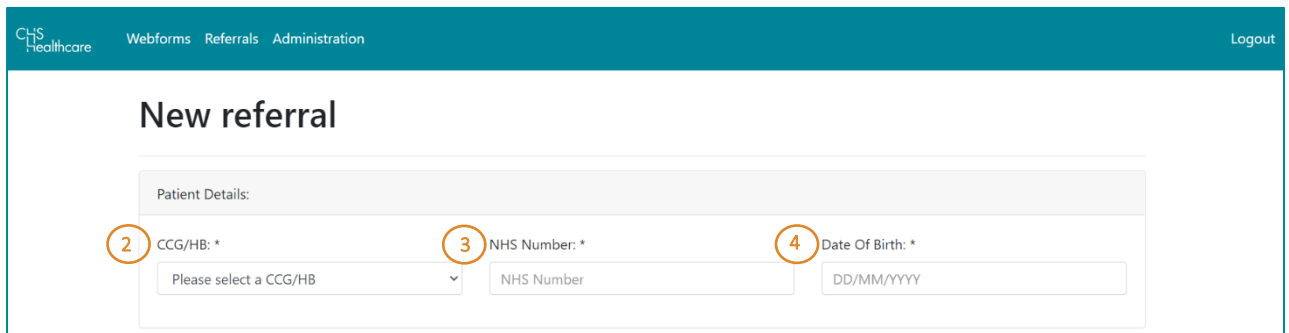
1. Click 'New Referral'.



When creating a referral to submit, there are two sections that need to be completed: **Patient Details** and **Referral Details**.

The Patient Details section include the basic demographic information regarding the patient, ***The fields that are mandatory are highlighted with an Asterix (*)**.

2. Enter the CCG/ Health Board you are submitting the Referral to
3. Enter the Patients NHS Number
4. Enter the Patients DOB



Referral Details

5. From Referral Type > Choose **DST**
6. Click Choose File to Upload the **Consent document** (if applicable)
7. Click Choose File to Upload the **Decision Support Tool** document
8. Click Choose File to Upload any **Other Documents to support the Referral**
 - a. You can upload **multiple Supporting Documents**.
 - b. Simply click Choose File again to add an additional Document.
 - c. Or click Choose File and then hold the 'Shift Key' on your keyboard while selecting multiple files from the same folder
9. Add any additional comments in support of the Referral
10. Click Submit

The screenshot shows a web form titled "Referral Details". It contains the following elements:

- Referral Type: ***: A dropdown menu with "DST" selected. A callout circle with the number 5 is next to it.
- Consent: ***: A "Choose file" button followed by "No file chosen". A callout circle with the number 6 is next to it.
- Decision Support Tool: ***: A "Choose file" button followed by "No file chosen". A callout circle with the number 7 is next to it.
- Other Documents:**: A "Choose Files" button followed by "No file chosen". A callout circle with the number 8 is next to it.
- Comments:**: A large text area for entering comments. A callout circle with the number 9 is next to it.
- Submit**: A blue button at the bottom left. A callout circle with the number 10 is next to it.

12 Monitoring Submitted Referrals

Once a referral has been submitted it will appear in 'My Referrals' section.

The screenshot shows the 'Referrals' page with the 'My Referrals' tab selected. A table lists three submitted referrals. The columns are: #, Status, CCG/HB, Referral Type, NHS Number, DOB, Submitted By, and Submitted On. The data rows are as follows:

#	Status	CCG/HB	Referral Type	NHS Number	DOB	Submitted By	Submitted On
3078	Submitted	Demonstration CCG	DST	111-111-1111	20-04-1943	will.haydock@chshealthcare.co.uk	16-12-2020 15:23
3015	Submitted	Demonstration CCG	DST	888-888-8888	20-04-1940	will.haydock@chshealthcare.co.uk	10-12-2020 14:43
3014	Submitted	Demonstration CCG	CHC	333-333-3333	20-04-1945	will.haydock@chshealthcare.co.uk	10-12-2020 14:34

The user can use the filters to search for specific submitted referrals by

- Status
- ICB
- Referral Type
- Submission Date.

Enter your chosen search parameter and click on **Apply** to filter your results.

The user can see the status of a referral in the **Status** field. This will update based on the actions of the ICB.

This screenshot shows the same 'Referrals' page but with the filter panel open and highlighted with an orange border. The filter panel includes dropdown menus for Status, CCG/HB, Referral Type, Submitted By, and Submitted On, along with a text input for Ref ID. The 'Status' dropdown is currently set to 'All'. Below the filter panel, the table from the previous screenshot is visible, with the 'Status' column highlighted by an orange box. The 'Status' field for the first two rows is 'Submitted'.

The statuses are as follows:

- **Submitted To CCG**; the initial referral submission is complete and is awaiting to be viewed by the CCG
- **Received by CCG**; the referral has been acknowledged as being received by the CCG and will follow the referral pathway
- **Rejected by CCG**; the referral has been rejected by the CCG –

13 Digital Rejected Referrals

You have 7 Days to correct/amend any rejected Fast Tracks and Checklist that were submitted via the Referral Portal.

You have 21 Days to correct/amend any rejected DSTs that were submitted via the Referral Portal. This is for DSTs created using a Blank DST, Annotated DST or DST using Checklist data.

Within the timeframe, the submitting user will be able to edit and resubmit any rejected Fast Tracks, Checklists and DSTs they have previously submitted.

When a Digital CHC Checklist/Fast Track/DST is rejected, you will receive an email with this message:

“Hello

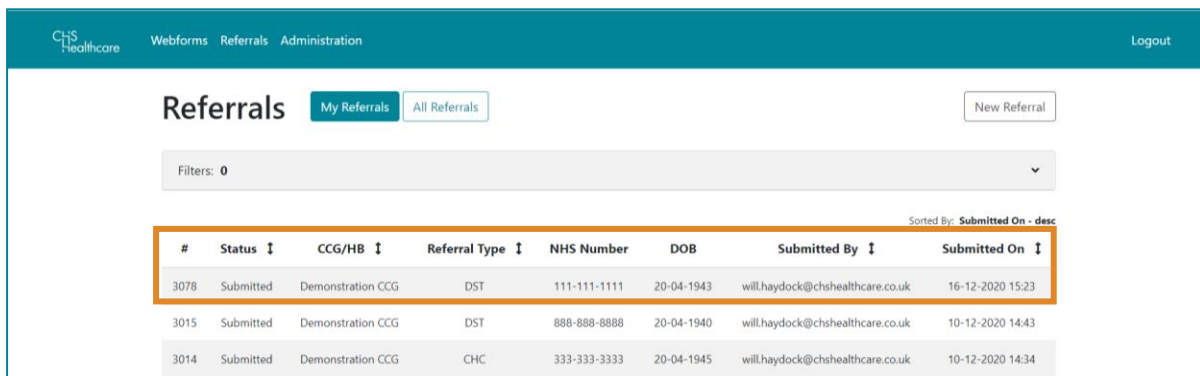
Your Referral ID <#####> has been rejected by ** ICB.

Please log onto the CHS Referral Portal to review the rejection comments and take any action that may be required. If no action is taken within (7 or 21 depending on type of form) days, then any associated webform data will be removed from the referral.

This email is for information only, please do not reply to this email.

Thanks “

You can access the form from the Referrals List within the Digital Referral Portal. You will see that the Digital CHC Checklist/Fast Track/DST has been **Rejected by the ICB**.



#	Status	CCG/HB	Referral Type	NHS Number	DOB	Submitted By	Submitted On
3078	Submitted	Demonstration CCG	DST	111-111-1111	20-04-1943	will.haydock@chshealthcare.co.uk	16-12-2020 15:23
3015	Submitted	Demonstration CCG	DST	888-888-8888	20-04-1940	will.haydock@chshealthcare.co.uk	10-12-2020 14:43
3014	Submitted	Demonstration CCG	CHC	333-333-3333	20-04-1945	will.haydock@chshealthcare.co.uk	10-12-2020 14:34

You can see why the Digital CHC Checklist/Fast Track/DST has been rejected by clicking on it and reviewing the Rejected Comments at the top of the screen.

The comments are made up of a pre-determined reason and free format notes that will be added by the ICB.

The pre-determined reasons are:

- Submitted to wrong ICB.
- Unable to Verify as Positive or Negative.
- Submitted in Error.

Edit referral #3467 Back

Rejected Comments

17/11/2020 16:12 : Not Able to Verify as Positive or Negative, Rejected Comments will appear here.

Patient Details:

CCG/HB:	NHS Number:	Date Of Birth:
Demonstration CCG	555-555-5555	20/04/1949

Additional Patient Details

Ethnic Origin:	Title:	Forename:	Surname:
Indian	Mrs.	Chuck	Norris

Address:	Town:	Postcode:
15 Larne Drive, Broughton	Chester	CH4 0QF

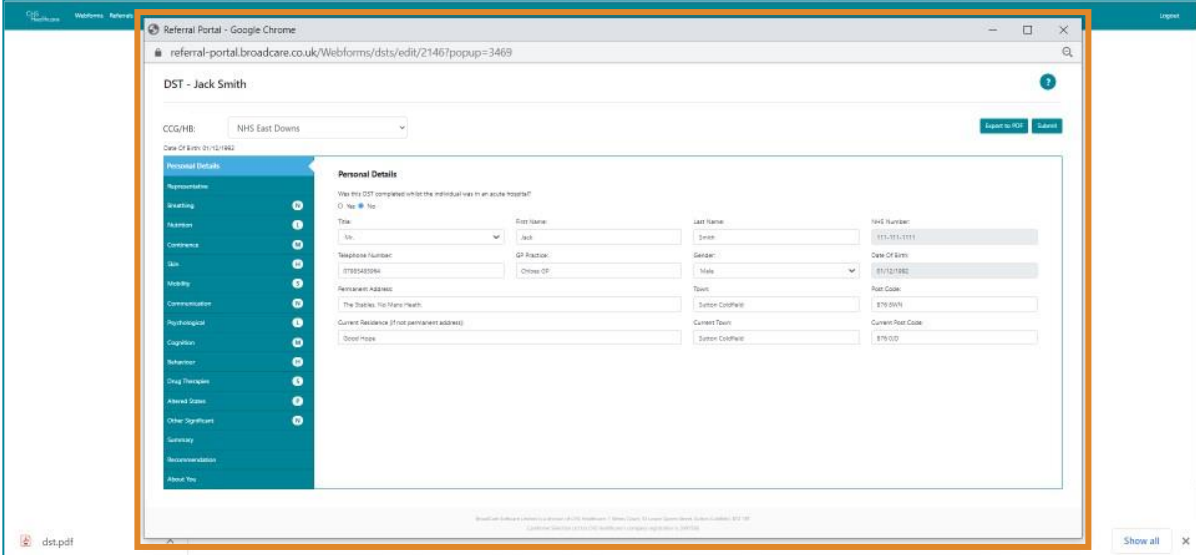
Referral Details:

Referral Type: *
DST

<p>Consent:</p> <p><input type="button" value="Choose file"/> No file chosen</p>	<p>Webform Name:</p> <p>Dst ID2137</p>	<p>Other Documents:</p> <p><input type="button" value="Choose Files"/> No file chosen</p>
---	---	--

Comments:

You can edit the Digital Referral by Clicking in the Referral ID Link in the Edit Referral Screen.
This will open the Digital CHC Checklist/Fast Track/DST in a new window.
Simply make the relevant changes and re-submit the Digital CHC Checklist/Fast Track.



The screenshot shows a web browser window titled "Referral Portal - Google Chrome" with the URL "referral-portal.broadcare.co.uk/Webforms/dsts/edit/21467popup=3469". The page is titled "DST - Jack Smith" and features a "CGG/HB:" dropdown menu set to "NHS East Downs". Below this is a "Personal Details" section with a question: "Was this DST completed whilst the individual was in an acute hospital?" with radio buttons for "Yes" and "No". The form contains several input fields: Title (Mr.), First Name (Jack), Last Name (Smith), NHS Number (111-111-1111), Telephone Number (0123456789), GP Practice (Cherry OF), Gender (Male), Date Of Birth (01/12/1982), Referral Address (The Studios, 100 Years Health), Patient Code (876 5432), Current Referral (First permanent address), Current Team (System Coldwell), and Current Referral Code (876 5432). A left-hand navigation menu lists various sections: Personal Details, Representation, Identifying, Address, Comments, Sex, Mobility, Communication, Psychological, Cognitive, Behaviour, Drug Therapy, Alcohol Status, Other Significant, Summary, Recommendations, and About You. At the bottom right, there is a "Show all" button.

Once edits have been completed, please ensure you add another comment in the comments section at the bottom of the Edit Referral Screen.

Your Digital Referral will retain its Referral ID.

14 Non – Digital Rejected Referrals

Non-Digital Referrals cannot be resubmitted. If your CHC Checklist/Fast Track/DST form is rejected, you will need to complete a new form and submit that to the ICB.

You can see why the Digital CHC Checklist/Fast Track/DST has been rejected by clicking on it and reviewing the Rejected Comments at the top of the screen.

Edit referral #3467

Back

Rejected Comments

17/11/2020 16:12 : Not Able to Verify as Positive or Negative, Rejected Comments will appear here.

Patient Details:

CCG/HB:	NHS Number:	Date Of Birth:
Demonstration CCG	555-555-5555	20/04/1949

Additional Patient Details

Ethnic Origin:	Title:	Forename:	Surname:
Indian	Mrs.	Chuck	Norris

Address:	Town:	Postcode:
15 Lame Drive, Broughton	Chester	CH4 0QF

Referral Details

Referral Type: *

Consent: <input type="button" value="Choose file"/> No file chosen	Checklist: * <input type="button" value="Choose file"/> No file chosen	Other Documents: <input type="button" value="Choose Files"/> No file chosen
---	---	--

Comments:

Unlike a Digital Referral, you are unable to edit the paper form and must complete a new referral from scratch. You can then upload the new paper form and then click **submit**.

15 Frequently Asked Questions

Question 1

Can I submit referrals to different ICBs?

Answer

Yes, you can if you have access to submit referrals to the ICB, however you CANNOT submit one referral to multiple ICBs.

Question 2

The ICB I want to submit to is not on my list – what should I do?

Answer

You will need to contact a Referral Portal Administrator at the ICB you wish to submit the referral to and ask them to add their ICB to your user profile

Question 3

I have submitted a Referral to the wrong ICB, what should I do?

Answer

Contact the ICB and ask them to reject the referral so you can submit it to the correct ICB

Question 4

How will I know that my referral has been viewed/accepted by the ICB?

Answer

You can check the status of a referral by logging into the Referral Portal and viewing the Status column

Referrals New Referral

Referral submitted successfully to East Downs CCG.

Filters: 0

Sorted By: Submitted On - desc

#	Status	CCG	Referral Type	NHS Number	DOB	Submitted By	Submitted On
252	Submitted to CCG	East Downs CCG	CHC	111-111-1111	21-07-2019	nicola.trow@chshealthcare.co.uk	22-07-2019 02:40

Question 5

If I have any issues with the portal, who should I contact?

Answer

You should contact the ICB direct and speak to a Referral Portal Administrator

Question 6

If my referral has been rejected, will I know the reason why?

Answer

Yes.

Within the filters section you can filter on Rejected by ICB status to see all referrals that have been rejected, click into the referral and the reason will be shown at the top of the page. Once the reason for rejection has been rectified you will need to submit a new referral.

You will also be notified via email if a referral has been rejected

View Referral #283 Back

Rejected Comments

Rejected Comments:

Duplicate test test

Patient Details

CCG: Demonstration CCG NHS Number: 181-750-3405 Date Of Birth: 04/04/1940

Additional Patient Details

Ethnic Origin: Gypsy Title: Prof Forename: Gary Surname: Green

Address: 1 Lower Green Street Town: Sutton Postcode: B72 1RT

Referrals

New Referral

Filters: ✕

Status: All Submitted to CCG Received by CCG Rejected by CCG

CCG: All Referral Type: All Submitted By: All Submitted On: dd/mm/yyyy

Apply Reset

Sorted By: Submitted On desc

#	Status	CCG	Referral Type	NHS Number	DOB	Submitted By	Submitted On
281	Rejected by CCG	Demonstration CCG	CHC	181-750-1403	04-04-1940	clavdia.hodgell@chshealthcare.co.uk	22-07-2019 05:53
276	Rejected by CCG	Demonstration CCG	CHC	111-111-1111	08-01-1987	arun.jadhav@thehealth.com	20-07-2019 06:48
227	Rejected by CCG	Demonstration CCG	Fast Track	111-111-1111	01-07-2019	arun.jadhav@thehealth.com	20-07-2019 06:16
235	Rejected by CCG	Demonstration CCG	CHC	111-111-1111	01-07-1990	arun.jadhav@thehealth.com	22-07-2019 10:58
220	Rejected by CCG	Demonstration CCG	CHC	111-111-1111	07-01-1987	arun.jadhav@thehealth.com	19-07-2019 01:58
221	Rejected by CCG	Demonstration CCG	Fast Track	111-111-1111	08-01-1987	arun.jadhav@thehealth.com	19-07-2019 01:51
111	Rejected by CCG	East Downs CCG	CHC	207-374-5903	29-03-1952	nicole.jackson@broadcare.co.uk	16-07-2019 11:34