

Referral Checklist

To facilitate effective triage please consider using this checklist to ensure you have included all the relevant information in your referral so that the patient can receive the right care at the right time without any delays in their care journey.

Some important points to consider:

1. Patient details

- Check patient's contact details both address and telephone/mobile number are correct on Vision/EMIS or Trak.

2. Referral Priority

- Check [RefHelp](#) to see the criteria for Routine, Urgent, and USOC referrals.
- USOC: For more information about USOC referrals please consider looking at <http://www.cancerreferral.scot.nhs.uk/> and remember to let the patient know that you have sent a USOC referral.

3. Clinical details

- Give a clear reason for referral and your expectations e.g. are you asking for a diagnosis, further tests, advice only or help in the management of the patient.
- Results of relevant examinations performed.
- Include any relevant past medical history.
- Management to date for the condition that the patient is being referred for, including information about previous consultations and medication/treatment already tried.

4. Additional Information

- Check that there is not already a referral in the system for the same issue.
- Results for preliminary diagnostics in primary or secondary care.
- Special Requirements/Additional Needs. Does the patient have a learning disability or a hearing, visual or mobility impairment? Is an interpreter needed? Please note that family members should not be used to translate. Check the tab on Sci Gateway to make sure that this information has been included or add it manually or mention in referral letter (if applicable).
- For surgical specialties: Discuss nature of proposed surgery, consider patient choice and fitness for surgery. Queries regarding fitness will be addressed by secondary care.

Help & Support

For any queries related to RefHelp or Referrals please use this form: [Report a problem](#). Alternatively, you can also email us at: loth.refhelp@nhs.scot