

# OPTOMETRY PRACTICE INFORMATION: SUPPORTING GUIDANCE NOTES ON THE USE OF THE CLINICAL COMMUNICATIONS GATEWAY FOR ELECTRONIC REFERRAL

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Ophthalmic Contractors and their staff should read and implement the guidance in this document in the use of the Clinical Communications Gateway (CCG) for generating electronic referrals (eReferral) for patients and service users. This guidance document **does not replace the 'Clinical Communications Gateway Optometry Practice User Guide'** which the Health and Social Care Board provided to all contractors at the training sessions. All individual CCG users must ensure that they have a working knowledge of the User Guide and should refer to it in the first instance should they have any queries in relation to the use and functionality of the CCG application.

The following guidance notes will assist as an aide memoir in the use of CCG and any issues or queries not addressed in this guidance document should be directed to the Optometry and Business Support staff in the Health and Social Care Board. Contact details for these staff are noted at point 6 in this document.

**Please ensure that you and your staff read and implement this guidance and that it is accessible to all optometrists in your practice who use the CCG for eReferral.**

**WHEN USING CCG PLEASE BE REMINDED OF THE FOLLOWING IMPORTANT GOVERNANCE ISSUES:**

- 1. Individual CCG user accounts should ONLY be accessed and used by the optometrist for whom they have been established and assigned to. Optometrists should absolutely not share their user account details and passwords. The only exception to this is in relation to pre-registration optometrists who will not have individual CCG user accounts and will have to make referrals using their supervisors CCG account under strict supervision aligned to the GOC Standards of Practice and other guidance.**
- 2. You must ensure that you retain knowledge of your CCG password security questions and actual password. Password resets will be prompted by CCG every 90 days. Password resets should not be routinely requested from the support team in BSO information services.**

## **1. Generating Ophthalmology Referrals via CCG**

### **1.1 Referral Options: HSC Trusts and Hospital Sites**

Ophthalmology is listed as a speciality within all five Health and Social Care Trusts (HSCT). For most referrals you will be generating a referral to the HSCT where your practice is based and where the patient lives. Not all hospital sites within the HSCT will have Ophthalmology as a referral option and there is always the possibility that services can be changed and relocated within any one HSCT area or hospital. **You must pay particular attention to the options for referral as noted on the CCG in order to generate the referral appropriate for your patient and the condition you are referring them for.**

For example: Within CCG there is NO option to refer to Ophthalmology at the Mid-Ulster Hospital under the Northern HSCT option.

Ophthalmology service in the Mid Ulster is currently provided by the Western HSCT and hence you could refer your patient to Altnagelvin Hospital (relevant Ophthalmology option) where the referral will be accepted and processed and the patient may be allocated an appointment at a hospital clinic which may be the Mid Ulster or one of the other hospital sites which Western HSCT operate.

## 1.2 Referral Protocols: Selecting the right option and completing the referral

When generating a referral for your patient please ensure that you use the correct referral protocol for the condition you are referring the patient for. All options for referral have CCG [advice banner pages](#) which you should read to ensure that you are using the correct protocol for your referral. Optometrists are familiar with the use of the specific current 'paper' referral forms for the various conditions e.g. cataract, glaucoma, suspect OHT, rapid access macular conditions (wAMD, RVO and DMO) and also with the use of the 'General' GOS 18 for all other 'ophthalmic conditions'.

All of these options are available in electronic format on CCG so please ensure that you continue to use the appropriate referral template for the condition you are referring the patient for. **Optometrists must NOT select any referral template that begins with the word 'Healthy', these templates are only for use by certain GP practices.**

Key tips for completing an eReferral:

- ✓ When you have selected the correct referral protocol and entered your patient details you will be asked to match the Health and Care Number. There are FOUR variables required to match a patient to their HCN – Surname, Forename, Date of Birth, Postcode (plus a gender identifier) – please ensure that you match by including all necessary information. **It is useful to ask your patient for all possible names which they may be known as because sometimes they may have attended a hospital and their records may show a different name (forename in particular) and the search for patient will be affected by this. Just because a patient search finds a match when you are submitting a GOS claim on OCS it does not necessarily mean that the same details will result in a positive search on CCG.**
- ✓ Please ensure that you complete the mandatory text box/part on the referral which asks for the main presenting complaint/symptom
- ✓ Please ensure that you tick the MANDATORY boxes in relation to:
  - Patient's ability to drive
  - Is an attachment being provided with the referral
  - Has the GP been notified of the referral (using the relevant Memo 1 or 2)

- ✓ Please ensure that IF YOUR PATINET has special needs or requirements you complete the relevant section on the referral template. This is important and is evidence that you have considered and complied with equality and diversity requirements to ensure accessibility of service for patients who have special considerations
- ✓ Please ensure that you PREVIEW your referral prior to sending it, once you have pressed the 'proceed' button on CCG you cannot retrieve the referral
- ✓ If you experience difficulties in attaching a PDF, jpeg image or other attachment **please contact one of the HSCB Optometric clinical advisers who will provide assistance and advice on how to successfully attach documents to your referral.** Occasionally a document may fail to attach and an error message will appear on the screen. IT support services have advised that this is due to the resolution of the original document and there are measures which can be taken to resolve this issue.

**BEFORE PROCESSING A REFERRAL PLEASE ENSURE THAT YOU DOUBLE CHECK THAT YOU HAVE:**

- 1. SELECTED THE CORRECT HEALTH AND SOCIAL CARE TRUST**
- 2. SELECTED THE APPROPRIATE HOSPITAL SITE**
- 3. SELECTED THE APPROPRIATE REFERRAL PROTOCOL / OPTION FOR THE OPHTHALMIC CONDITION YOU ARE REFERRING THE PATINET FOR**
- 4. COMPLETED AND ENTERED IN FULL THE RELEVANT CLINICAL INFORMATION REQUIRED FOR THE REFERRAL**
- 5. COMPLETED ALL THE MANDATORY FIELDS ON THE REFERRAL TEMPLATE – THESE ARE ANNOTATED WITH AN \***

### 1.3 Your Referrals: Providing information to GP

As explained at the training sessions attended you are required to notify the patient's GP that you have referred their patient by using a memo template which is available at the following CCG information link:

<http://www.hscbusiness.hscni.net/services/1825.htm>

There are two templates:

Memo 1: Notification only

Memo 2: Notification and an action is required by GP

*Please note that if you are using Memo 2 and asking the GP to undertake medical or diagnostic tests that you may need to specify the urgency for such tests e.g. if you detect a retinal embolus and are seeking medical investigations for risk of TIA. In this example, it is imperative that you use the Memo and ensure that it is expedited to the correct GP surgery for prompt attention.*

If you have specific queries in relation to the process and options for generating Ophthalmology Referrals please contact any one of the Health and Social Care Board Optometric Clinical Advisers, contact details are noted in section 3 of this guidance.

## 2. CCG - Administration and IT Support

The following points of information must be complied with when practices and individual optometrists are accessing the FPS Optometry Portal and using the Clinical Communications Gateway.

### 2.1 Using the FPS Portal: GOS Contractor User Agreement

All GOS contractors who access the FPS Optometry Portal must be aware of and agree to the terms of the User Acceptance Agreement.

### 2.2 Connectivity to the FPS Portal: Managing Technical Issues

GOS Contractors who use the FPS Portal for the submission of GOS claims and who encounter 'technical' issues with accessing the portal should contact the eBusiness team in the Business Services Organisation (BSO) in the first instance to resolve the problem with connection to the HSC Network.

## 2.3 Clinical Communication Gateway: IT Support

If a practice is having difficulties in using the **actual CCG Application**, e.g. the application is visible and open but is not functioning properly, then please use the following email contact to log the query:

[supportteam@hscni.net](mailto:supportteam@hscni.net) or, by telephone call to 028 9536 2400.

When logging an IT query in relation to CCG you will be required to provide the following information to the support team staff member:

- i. Optometry Practice Name
- ii. Premise/Practice Code
- iii. Name of Optometrist logging the IT query
- iv. Contact Telephone number (an email address may also be requested on occasions if required)

## 2.4 CCG User Accounts: New Optometric Staff or, Changes to Existing Staff

In line with GOS Regulations Ophthalmic Contractors are required to notify of any changes to their existing [Ophthalmic Listing](#) details. This applies for any changes to Optometric staff involved in the provision of GOS. ***Notification of these changes is not only your statutory responsibility but is vitally important as they are linked to the process for creation and deletion of CCG user accounts for Optometrists working in your practice.*** If you do not provide notification of new and/or changes to your existing Optometric staff CCG user accounts cannot be created or amended.

If there are changes to your Optometric Staff please complete the '[Notification of Changes to Ophthalmic Listing](#)' form (available as a webform via the FPS Optometry Portal or, in hard copy at the following link:

[http://www.hscbusiness.hscni.net/pdf/Notification\\_of\\_change\(s\)\\_to\\_Ophthalmic\\_Listing\\_information\\_v2\\_July\\_15.pdf](http://www.hscbusiness.hscni.net/pdf/Notification_of_change(s)_to_Ophthalmic_Listing_information_v2_July_15.pdf)

Please follow the instructions on the form to send your completed notifications to BSO for processing as per the information on the form.

## 2.6 CCG: Relevant Supporting Documentation

Important information and documentation in relation to Electronic Referral and the use of the Clinical Communication Gateway is available at the following link – please click on the relevant tab

<http://www.hscbusiness.hscni.net/services/2767.htm>

You should read and have a working knowledge of the CCG Optometry Practice User Guide.

## 3. CCG- Important Contact Details

Please note the following contact details for use in the circumstances noted in sections 1 and 2 of this guidance.

3.1 For queries in relation to generating Ophthalmology referrals and options on CCG for referral:

### Health and Social Care Board Optometric Clinical Advisers

Janice McCrudden – [janice.mccrudden@hscni.net](mailto:janice.mccrudden@hscni.net) | 028 9536 2855

Fiona North – [fiona.north@hscni.net](mailto:fiona.north@hscni.net) | 028 9536 2104

Margaret McMullan – [margaret.mcmullan@hscni.net](mailto:margaret.mcmullan@hscni.net) | 028 9536 3239

3.2 For queries in relation to CCG

### Business Services Organisation: Information Technology Services (ITS)

Centre House, 79 Chichester Street, Belfast BT1 4JE

Telephone: 028 9536 2400

Email: [supportteam@hscni.net](mailto:supportteam@hscni.net)