

## Getting Started with Pharmacy First Referrals

### 1. Getting Started

EMIS Web users will be able to send referrals to the pharmacy using Patient Connect Access which can be found on screen in the patient record. Details of how to access that can be found [here](#). *(Then please skip to step 3.)*

SystemOne users will need to contact PharmOutcomes to set up passwords to access PharmRefer. New users are advised to email [sales.pho@EMIShealth.com](mailto:sales.pho@EMIShealth.com) with the following information: ODS code of the practice, a list of names and email addresses for staff members to be registered. Please indicate which staff members you would like to be set up as Admin accounts (it is advisable to have at least two or three Admin accounts at each practice).

### 2. Admin and Access

Admin accounts can add other users and also reset passwords, etc.

- Guidance on setting up new user accounts can be found [here](#).
- Details of how to reset passwords can be found [here](#).
- Details of how to reset Multifactor Authentication can be found [here](#).

Before first accessing PharmRefer, users will need to set up Multi-Factor Authentication (MFA) on Pharmoutcomes. This can be done using an authenticator app on a mobile phone, or by using a desktop authenticator. Details of how to set up MFA can be found [here](#). Users will need their own log-in and passwords should never be shared.

Some areas of West Yorkshire have approved the use of a desktop authenticator\*.

- Guidance on installing the desktop authenticator can be found [here](#).
- Guidance on daily use of the desktop authenticator can be found [here](#).

**\*Please note:** The desktop authenticator has **not** been approved for use by Leeds Place IT team.

It's a good idea to save the link to PharmRefer onto the toolbar on the surgery computer so that it can be easily located. Alternatively, it could be saved onto the Care Navigator template on screen. Care Navigators should log onto the programme at the start of their shift, so it is ready to use when they need it.

### 3. Sending a referral

#### EMIS Web

EMIS Web users will find that the Patient Connect Access app populates the patient details into the referral for them. They will then need to add details of the condition being referred and then select the pharmacy to send the patient to. A video showing how to do that can be found [here](#).

Patient Connect Access will take the Care Navigators through some triage questions which will help them to decide if the patient is suitable to refer to the pharmacy. More experienced Care Navigators may choose to skip the triage questions, but it is recommended that anyone new, or less experienced, follows this process as it will help to reduce the number of patients referred back to the surgery.

Once the referral details are complete, the system will ask the Care Navigator to select a pharmacy to send the referral to. Only pharmacies providing the Pharmacy First service will appear on the list. Care Navigators should **always send the referral to the pharmacy the patient chooses**.

## SystemOne

SystemOne users will need to transfer the patient details across to PharmRefer. The easiest way to do this is to copy and paste the patient's NHS number.

**Users are advised to PDS-match the patient to ensure the pharmacy receives the correct patient details.**



The image shows the PharmRefer logo at the top, with a blue arrow pointing from the 'Information' tab to the 'Sent' tab. Below the logo is a blue button labeled 'SEARCH FOR PATIENT IN PDS'. Underneath the button is the text 'Or fill in their details manually below'. Below this is a form with three input fields: 'Patient Name' (with a hint 'First name then last name, eg "John Smith"'), 'Patient Date of Birth' (with a hint 'In format DD-MM-YYYY, eg 16-06-1993 for the 16th June 1993'), and two radio buttons for 'Male ♂' and 'Female ♀'.

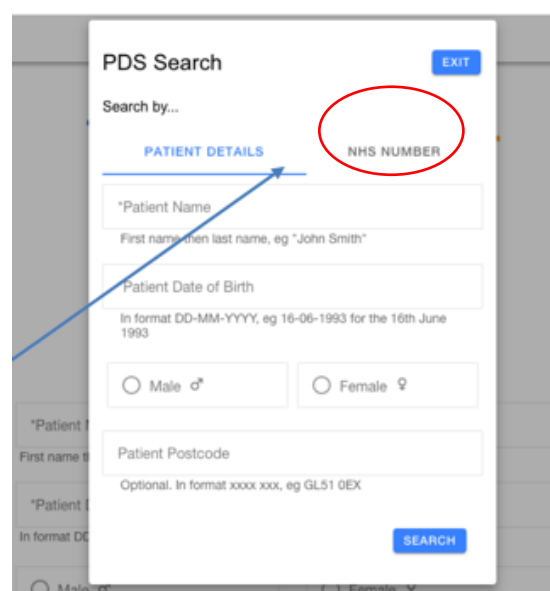
- PDS search button – allows search for patient information that is directly imported to the screen from the Personal Demographic Service (PDS)
- Patient name
- Date of Birth
- Gender
- Mobile Phone number (If the patient has one) \*
- Name of Pharmacy the referral is to be sent to
- Referral notes field – to detail reason(s) for referral

Using the PDS search function is always a much faster way to populate the referral screen as all demographic information can be imported. To do this simply click the blue "SEARCH FOR PATIENT IN PDS" button.

Click on 'NHS NUMBER', paste the number in and then 'SEARCH'. If the patient details are correct click on 'YES, THIS IS MY PATIENT', to proceed.

PharmRefer will take the Care Navigators through some triage questions which will help them to decide if the patient is suitable to refer to the pharmacy. More experienced Care Navigators may choose to skip the triage questions, but it is recommended that anyone new, or less experienced, follows this process as it will help to reduce the number of patients referred back to the surgery.

Once the referral details are complete, the system will ask the Care Navigator to select a pharmacy to send the referral to.



The image shows a 'PDS Search' form with a blue 'EXIT' button in the top right corner. Below the title is a 'Search by...' section with two options: 'PATIENT DETAILS' and 'NHS NUMBER'. The 'NHS NUMBER' option is circled in red. Below this is a form with three input fields: 'Patient Name' (with a hint 'First name then last name, eg "John Smith"'), 'Patient Date of Birth' (with a hint 'In format DD-MM-YYYY, eg 16-06-1993 for the 16th June 1993'), and two radio buttons for 'Male ♂' and 'Female ♀'. Below these is a 'Patient Postcode' field (with a hint 'Optional. In format xxxx xxx, eg GL51 0EX'). At the bottom right is a blue 'SEARCH' button.

Only pharmacies providing the Pharmacy First service will appear on the list. Care Navigators should **always send the referral to the pharmacy the patient chooses.**

Full written information about how to use PharmRefer can be found [here](#). There is also a training video which can be found [here](#).

#### **4. Further support**

CPWY, in collaboration with the ICB, provides training for Care Navigators for Pharmacy First. Our Advanced Services Facilitators can visit your practice and deliver training on the service and the types of conditions that are suitable to be sent to community pharmacies. They can also meet with management teams to discuss local delivery of the service and help you to get started.

Get in touch if you would like to arrange support: [phil@cpwy.org](mailto:phil@cpwy.org) or call 0113 2727560.

#### **5. Resources**

[CPE page with all the GP resources](#)