



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



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 all contractors can access at the following webpage: [Electronic Referral & CCG Information \(hscni.net\)](http://hscni.net). 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 brief 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 ophthalmic services in the Strategic Planning and Performance Group (SPPG), Department of Health; contact details are noted in Section 3.

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 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. An Optometrist must ensure that they retain knowledge of their CCG password security questions (if set) and actual password. Password resets will be prompted by CCG every 90 days. If an account has been 'locked' password resets should be requested using the online "vFire" application. Please follow the guidance notes hosted on the Optometry Portal when requesting a CCG account password reset.



1. Generating Referrals via CCG

1.1 Referral Options: HSC Trusts | Hospital Sites | Referral Pathway

Ophthalmic (ophthalmology, optometry and orthoptic) services are listed in CCG for **all five** Health and Social Care Trusts (HSCT) destination, however responsibility for actual service provision sits with only two HSCTs – the Belfast and Western HSCT. Electronic triage and management of CCG referrals is enabled by the ‘encompass’ system. Information on referral status for HSC Trusts that are ‘live’ on and using encompass is visible in EpicCare Link. Optometrists who have an EpicCare Link account should check the patient record on EpicCare Link to view information on the referral.

Following log-in to the CCG system the default will be the HSCT where your practice is based. Please note:

- ✓ Not all hospital sites within any one 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.
- ✓ For many of the referral pathways, the actual referral is managed by a central team in the provider HSCT.
- ✓ The referring optometrist must pay attention to the options for referral as listed in the CCG system in order to generate the referral appropriate for the patient.

Please note the following specific pathway information when accessing CCG:

1. OHT Review & Monitoring Service:

This service is in place for identified patients who have been discharged from the HSCT with stable Ocular Hypertension to have their ongoing review and monitoring provided only by a small number of designated primary care Optometry practices as opposed to the previous hospital-based follow-up. This service is managed by the BHSCT and WHSCT in collaboration with primary care optometry practices. As part of the pathway to support the Optometrists who will be providing the service they will have access to a dedicated CCG pathway. **Optometrists who are not involved in this service should NOT select or use this CCG pathway.**



This pathway is **only for use** by Optometrists who are participating in and providing the enhanced service aligned to a defined service specification and associated protocols. The screen shot below shows where the OPTOMETRIST who is providing the OHT Review and Monitoring Service will access the CCG Pathway.

Send to: Belfast Health and Social Care Trust

or, Western Belfast Health and Social Care Trust Non-GP Locations/Providers

Optometry ECHO - OHT Monitoring

OPHTHALMOLOGY - OPTOM OHT MONITORING

This CCG destination is **ONLY** for optometrists providing the OHT Review & Monitoring Service

All Optometrists must use the existing referral pathway to the Glaucoma Service for new referrals for suspect OHT and suspect Glaucoma. Please select the referral destination 'Ophthalmology – Glaucoma Service' and the appropriate referral template (Suspect OHT or Suspect Glaucoma).

2. Post-Operative Cataract Review & Assessment Service:

This service provides post-operative review for patients who have had their cataract surgery and are deemed suitable for review in primary care optometry practice. This service **must only be provided** between 6 and 12 weeks after the patient has had their surgery. Outside of these time limits the service should not be provided.

A CCG destination exists to allow the reporting of the post-operative outcomes to the relevant HSC Trust (Belfast or Western). The template for recording the clinical findings from a post-operative cataract review and assessment as completed by an optometrist accredited to provide the service must be submitted after the service has been provided.

The screen shot below shows where the OPTOMETRIST who is providing the Post-Operative Cataract Review and Assessment Service will access the CCG Pathway to submit the report to the relevant HSC Trust.



My Favourites:	(Select favourite) ▼
Send to:	Belfast Health and Social Care Trust ▼
or, Western	Belfast Health and Social Care Trust Non-GP Locations/Providers ▼
	Cataract Post - Op Review BHSCT ▼
	OPHTHALMOLOGY - CATARACT POSTOP OPTOM USE ONLY ▼
Protocol:	Cataract PostOp RV - Optom Use ▼

All Optometrists using this CCG pathway to report the outcomes from a post-operative cataract review must remember to complete the CCG report with ALL the requested clinical information as noted on the guidance banner, including the patient reported outcome measure recorded in the free text box on the CCG template. Incomplete reports will not be accepted by the HSC Trust and payment for the service may be withheld by the BSO.

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 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 destination and template for the condition you are referring the patient for. **Optometrists should use the referral template that ends with or includes the phrase "For Optometry Use". Optometrists must not use other referral templates which have the terms 'Healthy' or 'MDS', these templates are only for use by GP practices.**



Key tips for completing an eReferral:

- ✓ When you have selected the correct referral protocol and entered your patient Health and Care Number you should match the patient.
- ✓ 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:
 - 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 PATIENT 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 (**twice**) on CCG you cannot retrieve the referral
- ✓ If you have provided NI PEARS and have generated a referral as a result please ensure that you annotate the enhanced services field on the referral template (clinical data tab) to indicate that NI PEARS was provided
- ✓ If you experience difficulties in attaching a PDF, jpeg image or other attachment, please contact ophthalmic services in the first instance

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

1. SELECTED THE CORRECT REFERRAL DESTINATION

2. SELECTED THE APPROPRIATE REFERRAL PROTOCOL / OPTION FOR THE OPHTHALMIC CONDITION YOU ARE REFERRING THE PATINET FOR

3. COMPLETED AND ENTERED IN FULL THE RELEVANT CLINICAL INFORMATION REQUIRED FOR THE REFERRAL

4. COMPLETED ALL THE MANDATORY FIELDS ON THE REFERRAL TEMPLATE – THESE ARE ANNOTATED WITH AN *

5. ENSURE THAT YOU FINALLY SUBMIT THE REFERRAL AND THAT THE STATUS IS NOTED AS “SUBMITTED**” IN THE CCG WORKLIST. NOTE THAT THE ‘VIEWED’(eye) ICON MAY NOT BE VISIBLE -THIS DOES NOT MEAN THAT A REFERRAL HAS NOT BEEN RECEIVED (SUBMITTED = RECEIVED)**



1.3 Your Referrals: Providing information/notice to the patient's GP

A brief notification of referral should be sent to the patient's GP 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:

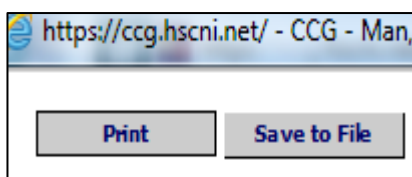
- ✓ Memo 1: Notification only
- ✓ Memo 2: Notification and an action is required by GP

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.

1.4 Your Referrals: Saving as a Separate Document

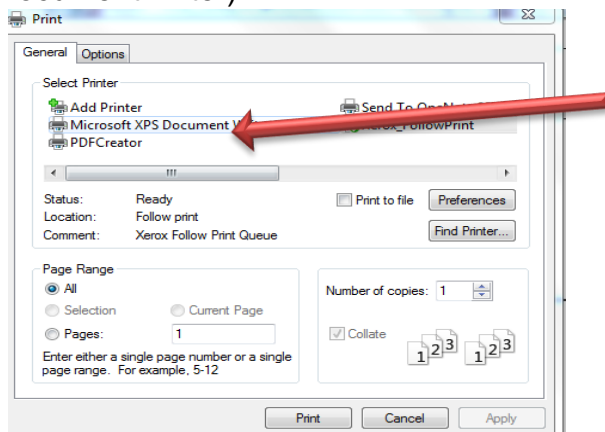
The CCG worklist retains the patient referral and the referral is also hosted in the patient's NIECR/ EpicCare Link record. However, if an optometrist has a specific reason to separately save a copy of the CCG referral please follow the steps outlined below.

1. Choose the PRINT option at the top of the referral when opened from the referral's worklist

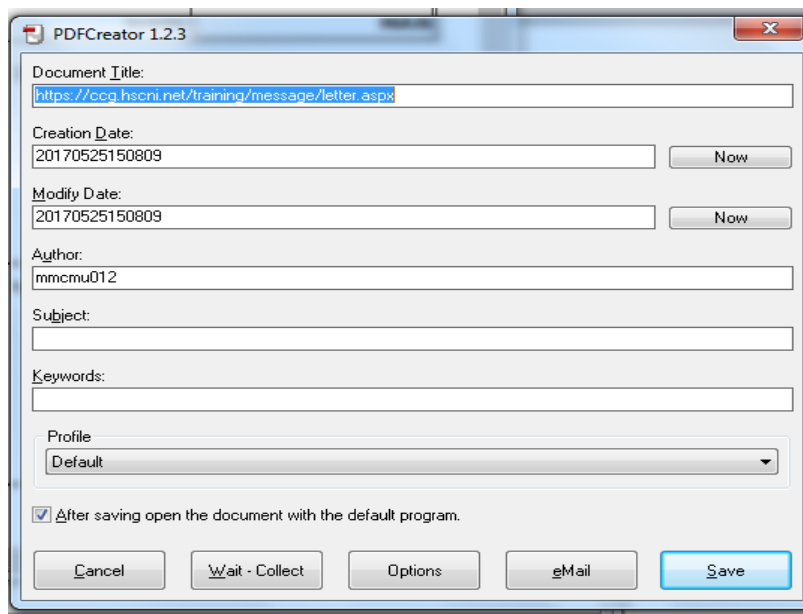




- The following box will appear. Please use the scroll bar to scroll to the left to view the options. To save as a PDF document **please click the 'PDF Creator' option** (Please note you also the option to save as an XPS Document writer).



- When PDF Creator is selected the following box will appear. Please **give your referral a title** / identifier and **select the 'Save' option**. You will be directed to the files in your PC where the referral can be saved.





2. CCG - Administration and IT Support

2.1 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. The eBusiness team can be contacted by email: ebusiness@hscni.net.

2.2 Clinical Communication Gateway: User Account Password Resets

If an optometrist requires a CCG password reset this must be actioned using the **vFire online portal**. Full details and instruction on the use of 'vFire' are hosted on the HSC Optometry Portal. Please ensure that you follow the instructions to ensure that your request is sent to the appropriate IT support staff.

2.3 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 hosted under the Optometry eForms link on the Optometry Portal (Section A, Form 1) .

2.4 CCG Resources and Supporting Information

- Important information and documentation in relation to Electronic Referral and the use of the CCG is available at the following link: [Electronic Referral & CCG Information - Business Services Organisation \(BSO\) Website \(hscni.net\)](#)



- Short training videos on the use of CCG are hosted on the home page of the HSC Optometry Portal (please note that the portal is only accessible when connected to the HSC network in practice: [FPS Optometry Secure Web Portal - Home \(hscni.net\)](#))

3. Contact Details

Please contact Ophthalmic Services (SPPG, DoH) if you have a query related to the CCG system.

Email: ophthalmic.services@hscni.net