**How to… Refer to different specialties**

*Referring patient care to other teams within the hospital, or to another hospital, can be a daunting task…Follow the hints and tips below to transform scary and irritating into simple and easy!*

**Making the referral**

Different people will have their own preferred methods of making a referral. The following guide uses the **SBAR** (**S**ituation, **B**ackground, **A**ssessment, **R**ecommendation) template, which is often used in a handover situation.

**STEP 1**. **Introduction**

* *“Hi my name’s \_\_\_\_\_\_\_, I’m one of the doctors working today on the \_\_\_\_\_\_ ward (at \_\_\_\_\_\_ hospital). Would it be possible to discuss a patient with you?”*

Always be polite and ask if the specialty doctor is available to talk – he/she might be in the middle of an important procedure or with a sick patient!

**STEP 2. Situation**

* *“The patient is a \_\_\_\_\_year old male/female called \_\_\_\_\_”*
* *“Their hospital number is\_\_\_\_\_\_\_”*
* *“I think they need to be admitted under your care.”*

The demographic details are essential here! Be careful to speak slowly and clearly, repeat if necessary. At this point the specialty doctor may be at a computer and need to search investigation results.

**STEP 3. Background**

* *“The patient is being treated for ­­\_\_\_\_\_\_* (provisional diagnosis)”
* “*They presented with…*(brief history)”
* “*On examination…*(brief summary of relevant examination findings including vital signs)”
* “So *far we have done \_\_\_\_\_\_, which show\_\_\_\_”*(brief summary of investigations e.g. bloods, CXR, urine dip)
* *“We are awaiting \_\_\_\_\_”* (mention any key outstanding investigations, as you’ll probably be asked about them anyway!)

Giving an appropriate background is the difficult part – try and summarise the key points that are appropriate to the patient. For example, if they have presented with chest pain then a good chest pain history, vital signs, cardiac risk factors, ECG and troponin results are all key bits of information here*.*

**STEP 4. Recommendation**

***“Is there anything else I should be doing for the patient?”***

***“I will keep you informed if the situation changes.”***

***“Should I send a formal written referral?”***

***“Can you review them on the ward/accept a transfer/see them in outpatients post discharge?”***

Use this part as an opportunity to clarify what the plan is from here and find out if there are any additional jobs that need doing –such as specialist bloods tests or imaging. Make sure you clearly state what you want from the person you are talking to, whether that be a to review the patient urgently on the war, or just ask for advice.

**STEP 5.Documentation.**

Document in the notes and update both the patient and parent team of the plan.

**Hints and Tips**

* **Be prompt**. A referral should take place as soon as the decision that the patient needs to be admitted and referred has taken place. (This will also stop the ward staff pestering you about decisions or waiting times!)
* **Ensure the patient is stable.** All emergency treatment and investigations should have taken place before the patient is referred. There’s nothing worse than a grilling from a registrar because you haven’t requested some simple blood tests or prescribed some fluid.
* **Don’t hang around for all your results to return** if this will not change your decision to refer the patient. If you’re still waiting for the coagulation screen to come back but your patient is horrendously septic with a CRP of 300 then just refer!
* **Ring around**. Sometimes it may take a doctor some time to answer their bleep or deck phone. If you can’t get hold of them after a couple of attempts it may be worth contacting another doctor in that department, or a member of the nursing team involved with admissions.
* **Practice.** Over time your referrals will get slicker and slicker. The most effective referrals contain all the key details in a short space of time – some people use “the time you have to chat with someone in a lift” as a rough guide to how long this should take. Practice makes perfect!