# Referrals Proforma for Sessional GPs - GUIDE

**The aim of this tool is to allow you to examine aspects of your own referrals and to reflect on your performance.**

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| Either – You are asked to keep a log of the referrals you make in the course of **10 surgeries**.  **You then complete Part 1.** Or You are asked to keep a log of each referral you make in the course of **5 surgeries**.  **You then complete Part 1 and Part 2.** And You are invited to write a reflective statement on what lessons have been learned from reviewing your referrals. |

It may be helpful to discuss your planned referrals audit with the practice manager to facilitate follow up at a later stage and to ensure that the practice is aware that you will respect patient confidentiality.

You will need to review your referrals against a set of questions. The proforma allows you to tabulate your answers.

## Part 1

1. What proportion of all your consultations resulted in referral?
2. What conditions did you find which you felt required referral?
3. When making the referral were you able to identify details of the past medical history, current medication and psychosocial data from the practice records?
4. Did you feel it would have been possible to discuss your decision to refer with one of the GP principals to explore alternatives to referral for any of these patients?
5. Did you identify any areas in which it seemed to you that the existing management of the patient was sub-optimal?

## Part 2 (an additional option which has learning value)

For this section it is suggested you contact the practice manager at a later date, and arrange a visit to review the medical records of your referrals to assess the outcome.

1. Did the outcome match your expectations?
2. Did you learn anything as a result of the referral?
3. On reflection was the referral appropriate or would you now do anything differently?
4. Did the referral follow the most effective pathway? (For example did it follow a local referral protocol, did the patient attend the most appropriate specialty, did you support your referral with appropriate initial investigations?)

## Conclusion (both parts 1 and 2)

You are invited to write a reflective statement on what lessons have been learned from reviewing your referrals.

# Referrals Proforma for Sessional GPs - TOOL

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| Number of consultations in 10 surgeries |  |
| Number of referrals |  |
| Proportion of consultations generating referral |  |

## Problems identified as requiring referral

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## Reflective Statement

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| What did you learn from this review? |
| What went well? |
| What might have gone differently? |
| Are there any issues which you would like to follow up? |

## Referrals Data Collection Proforma

### Part 1

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Letter number** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** |
| **Background information available?** |  |  |  |  |  |  |  |  |  |  |
| **Alternatives to referral possible?** |  |  |  |  |  |  |  |  |  |  |
| **Problems with existing management?** |  |  |  |  |  |  |  |  |  |  |

### Part 2

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Outcome as expected?** |  |  |  |  |  |  |  |  |  |  |
| **Any lesson learned?** |  |  |  |  |  |  |  |  |  |  |
| **In retrospect was referral the most appropriate?** |  |  |  |  |  |  |  |  |  |  |
| **Was the most appropriate method or pathway used?** |  |  |  |  |  |  |  |  |  |  |
| **Appropriate investigation? (if applicable)** |  |  |  |  |  |  |  |  |  |  |

You should use further copies of this page as appropriate.