

Work Instruction	Process when a patient is being referred
Version	Work Instruction 007 v1.0
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Author	Irene Harvey
Authorised by	Julie Pascoe

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1.0	Purpose, Scope & Objectives
	To describe the administrative process when a patient is referred into the Oncology Clinical Trials Team
2.0	Personnel & Responsibilities
	All staff
3.0	Background
	Patients are referred into the oncology clinical trials team via a number of ways including via MDT, consultant referral from clinic, screening of notes, patient self-referral and retrospective searches. Once referred patients need to all follow the same administrative process so that nothing is missed.
4.0	Definitions
	MDT = Multi-Disciplinary Team
5.0	Health & Safety
	As per Trust policies and guidance:

6.0	Equipment & Documentation
	IPM training and access required
7.0	Procedure
	<p>Print IPM frontsheet</p> <p>Write on the back of the IPM front sheet the date and name of person referring, as well as any other relevant information which may be of use to colleagues.</p> <p>Start to complete edge form</p> <p>Put in poly pocket</p> <p>Add details to patient tracker</p> <p>Put in comments 'To be screened' and highlight in red</p> <p>If patient requires to be screened prior to next weekly tracker check ensure time identified in calendar.</p> <p>Place poly pocket in screening folder</p>
8.0	References
	N/A
9.0	List of Appendices
10.0	Document Control
	<p>All Work Instructions are stored on the shared research drive: G/Research Common/Training & Education/How To work instructions</p> <p>Printed copies are not controlled and therefore may not be the current version of the document.</p>
11.0	Training Record & Competency Assessment
	<p>Records of the training and competency assessment for this work instruction shall be retained by the nominated educator for the staff group involved.</p> <p>All staff members have a responsibility to retain their own training records for continuing personal & professional development.</p>
12.0	Monitoring Compliance and Effectiveness
	The SMT will monitor their own teams' compliance with this process, bringing up concerns with team members as they occur and escalating to the team leader if there is non-adherence.
13.0	Revision History
	Issue 1 – First issue
14.0	Managerial Approval

Name	Signature	Title	Date
Author			
Irene Harvey		Service Improvement Facilitator	
Reviewers			
B6 SMT			
Ben Hyams			

