



Referral Management
Services

RMSL Service Description Document

To accelerate the move to **smarter, digitally enabled care pathways** by providing
a **single point of access** that makes every interaction **safer, fairer and easier**.



Overview

Referral Management Services Limited (RMSL) is a UK health technology supplier with over 12 years' experience delivering digital referral management services, supporting a patient population of over 30 million. We deliver a **single point of access** across health & social care, helping health systems direct people to the right care, first time, while improving safety, equity and the effective use of capacity.

Our **clinically designed, clinically led** solutions support key stakeholders such as patients, referrers, triage teams, booking teams and pathway administrators to more effectively manage the overall patient journey. Together, our solutions form a coherent ecosystem that brings together intelligent referral management, clinical triage, appointment booking, advice and guidance, patient-initiated follow-up and patient navigation & engagement. The RMS SPOA cloud platform can be procured as a full solution or individually on a per-module basis.

Who we can Support

Our solutions meet the needs of various stakeholders across primary and secondary care. We support large-scale service delivery at ICS and Health Board level via Commissioned services through to more localised implementations in partnership with Provider organisations across community services, hospital services and urgent care. Patient safety and data confidentiality are embedded in our systems, processes and people and is supported by robust governance aligned to recognised standards, including ISO27001/ISO9001 and DCB0129/0160.

How we can Support

Referral Management Our RMS provides digital-first, end-to-end management of referrals, ensuring the right information is captured first-time. Referral quality is improved through consistent application of pathway rules, whilst providing real-time visibility of progress and outcomes. Designed for NHS commissioning contexts to reduce admin burden, provide actionable intelligence and improve patient outcomes across primary and secondary care.	Capacity Management A practical way to turn available capacity into booked care, Capacitee supports capacity management and enables bookings into participating services, helping patients access timely appointments while reducing friction for booking teams. It supports urgent pathways and can be integrated with NHS 111, enabling emergency departments or commissioned hubs to book patients directly into primary care capacity.
Advice & Guidance ADVISR enables clinician-to-clinician Advice & Guidance services that support faster clinical decisions, shared care, and reductions in unnecessary referrals. Built to support NHS governance and integrated with core NHS services, ADVISR makes it easier for clinicians to seek and provide advice with the right clinical context.	Patient-Initiated Follow-Up PIFU improves patient autonomy and reduces avoidable outpatient demand by enabling follow-up only when it's needed. Designed for NHS settings to help services allocate resources to the patients most in need, PIFU supports safe, consistent and patient-centric follow-up pathways.

Patient Navigation & Engagement

NAVIGATR is an intelligent, patient-facing digital assistant that supports patients before and after key pathway steps through structured conversations. It can help with screening and readiness questions aligned to pathway criteria, guide patients through provider choice and booking information, and reduce avoidable follow-up by providing consistent, service-specific information. It is designed to integrate with SPOA workflows by capturing structured outputs into referral processes, and can be implemented with appropriate human oversight and escalation routes where clinical input is required.

Service Features

- **Single Point of Access**
Enhanced SPOA capabilities inclusive of referral intake, triage workflows, advice pathways, capacity management and patient-centric pathways.
- **Configurable pathways and templates**
Supports multiple specialties/settings with consistent rules and structured data.
- **Imaging-enabled triage**
PACS/imaging integration to support safe, informed triage and decision-making.
- **Capacity and booking management**
Slot and capacity management across providers/clinics, supporting urgent and routine flows.
- **Dynamic Advice & Guidance**
Clinician-to-clinician workflows with tracking, audit trail and outcomes.
- **Patient-Initiated Follow Up (PIFU)**
Supports elective recovery models and patient-initiated re-access within agreed criteria.
- **Patient-centric navigation and support**
Intelligent chat-based support for patients, driving improved screening, provider choice selection and adherence to pathway guidance
- **NHS interoperability**
Integrated with eRS, Summary Care Record (SCR), Patient Demographic Service (PDS), NHSmail and imaging (PACS) to support informed and efficient workflows
- **Real-time tracking and reporting**
Visibility for referrers, providers and commissioners from referral to outcome.
- **Governance and access controls**
Role-based access, audit history and information governance controls.
- **Managed clinical triage service (optional)**
RMSL can provide specialist-led clinical triage services operating to agreed pathway rules, ensuring timely, consistent triage and helping services manage demand safely.
- **Waitlist management support (optional)**
Supports prioritisation, validation and routing to available capacity, aligned to pathway rules.

Service Benefits

- **Faster, safer routing:** directs patients to the right care, first time.
- **Reduced admin burden:** structured referral capture reduces rework and chasing.
- **Better use of capacity:** matches demand to available slots across providers.
- **Improved waitlist control:** supports consistent prioritisation and pathway rules.
- **Supports new care models:** Advice & Guidance and PIFU reduce avoidable activity.
- **More equitable access:** consistent triage rules across geographies and specialties.
- **Better oversight:** real-time visibility of bottlenecks and performance.
- **Improves patient engagement:** reduces avoidable contacts and follow-ups.
- **Supports pathway readiness:** improves completeness of information

Mobilisation at a Glance

1. **Discovery & design:** confirm pathways, rules, roles, reporting and outcomes
2. **Configuration:** configure pathways, templates and roles, conduct agile UAT
3. **Governance:** implement controls & compliance checks, ensuring information security
4. **Integration** (as required): agree integration scope and test approach
5. **Training & readiness:** training for referrers/triage/booking teams, go-live planning
6. **Go-live & hypercare:** monitored go-live, transitioning to BAU service management

Data, security and compliance

- The service processes data needed to deliver referral, booking, advice and follow-up workflows. Our platform centres on NHS-tailored services that integrate with NHS infrastructure and aligns with governance/security expectations.
- Wider legal and operational terms are provided separately in the Supplier Terms & Conditions and relevant Call-Off Schedules.

Constraints and assumptions

- Requires modern web browser access and appropriate connectivity
- Integrations depend on buyer environment, approval timelines and test access
- Clinical decision-making remains with the Buyer's clinical governance model; the service supports workflow, routing and structured information capture

Interested to learn more?

- To learn more about our SPOA platform and how it can help your organisation, please contact us at hello@referral.solutions and visit our website <https://referral.solutions/>