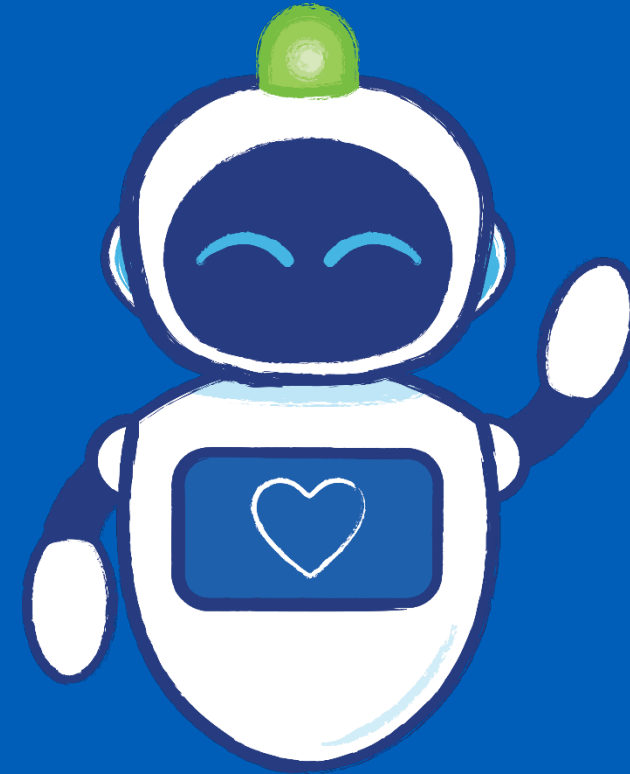


Intelligent Automation

Smart Referrals



Berkshire Healthcare
NHS Foundation Trust



IA Programme Board Update
February 2026



Smart Referrals is grounded in observations, common sense, and an understanding of established best practice.

While we don't claim to be referral pathway redesign experts, the feedback on the Smart Referrals robots has been overwhelmingly positive.

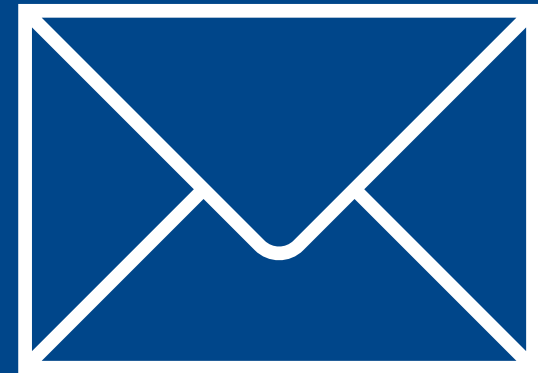
Naturally, there is understandable anxiety about the scale of the change and how it will be implemented but these are typical challenges that come with meaningful transformation.

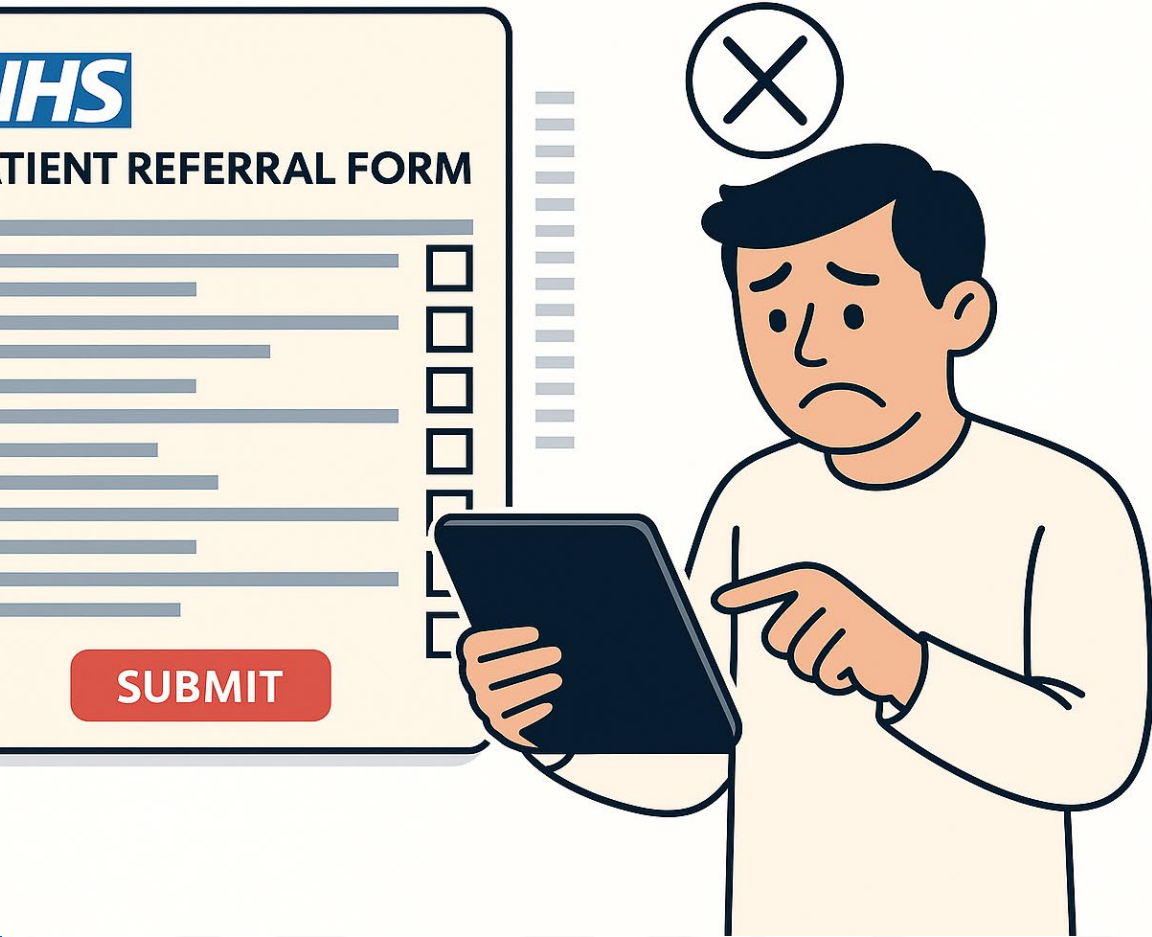


Digitising referrals aligns with NHS England's direction to retire paper-based referral pathways.

It strengthens safety, governance and traceability through secure digital exchange and end-to-end auditability, reducing the inherent risks of paper and post.

It also improves the patient experience with clearer, more predictable referral handling, while generating higher quality data to support system planning, performance management, and targeted improvement.

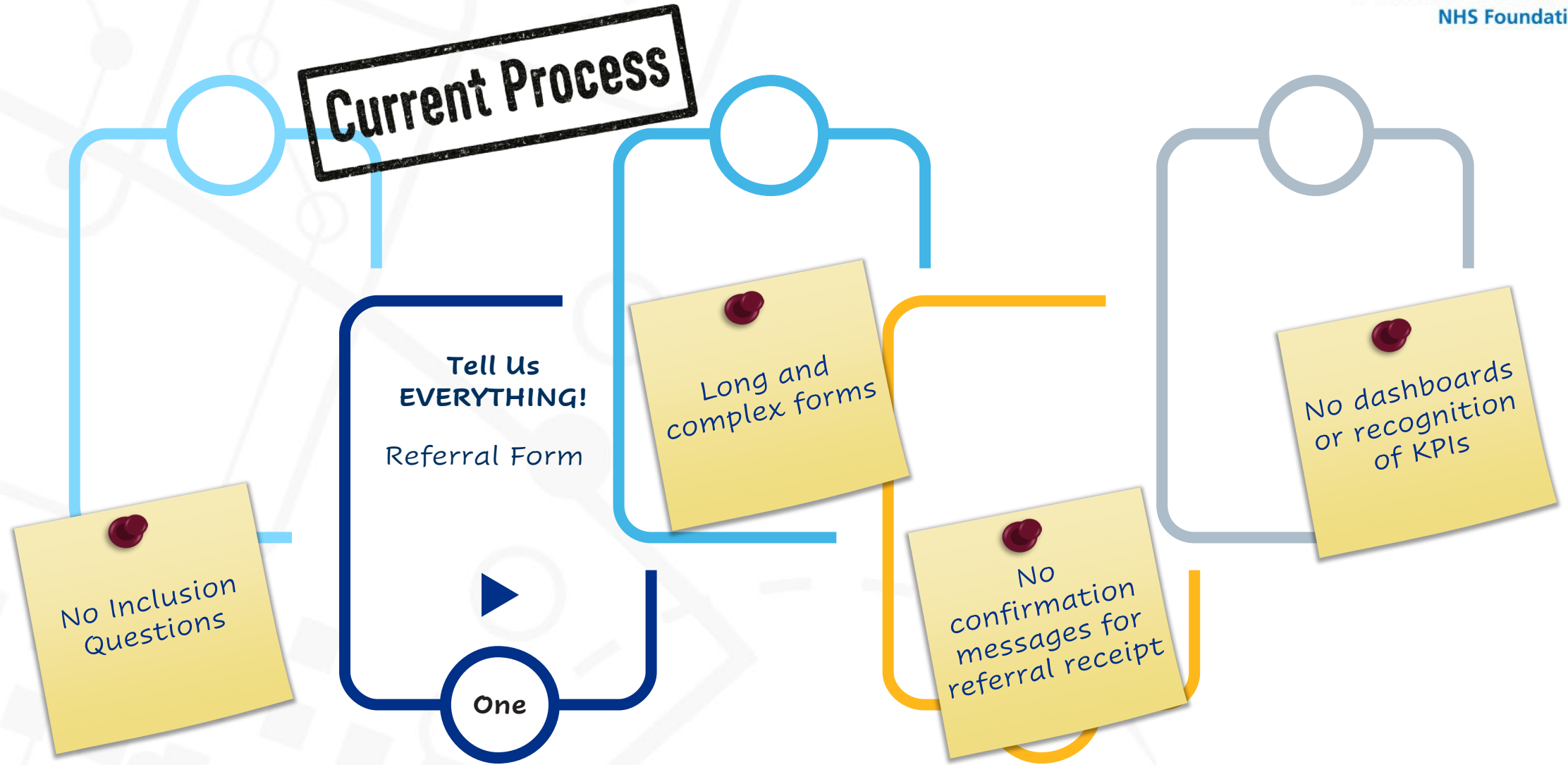


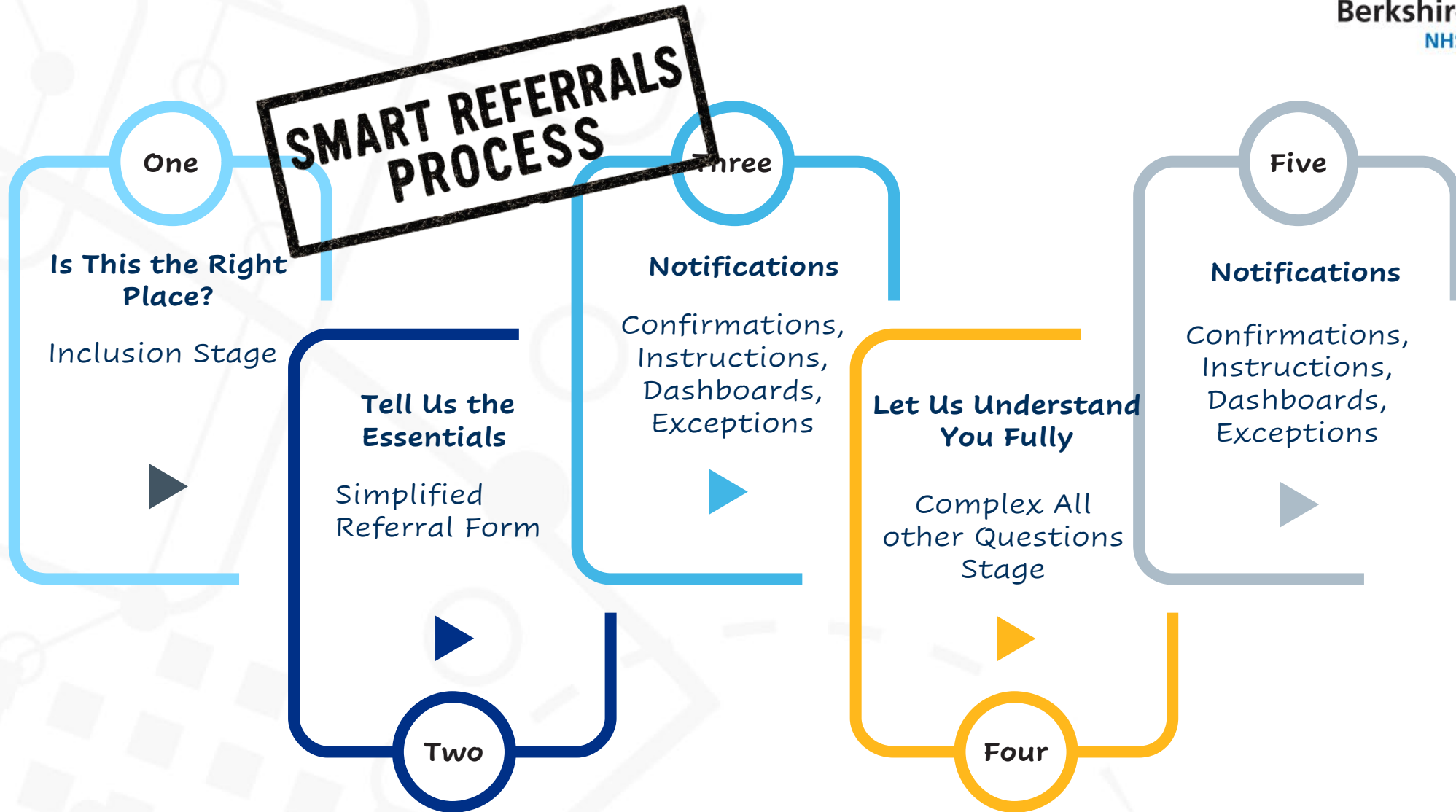


Current Referral Process – 4 Key Issues

1. High manual effort & duplication
2. Outdated, paper-era forms & language barriers
3. Weak form governance & inconsistent change control
4. Poor patient experience & late failure points

Smart Referrals





Step 1. Eligibility...

Each referral starts with a short form to confirm basic eligibility before collecting detailed information.

Stops ineligible referrals early

Users can quickly find out whether the service is appropriate without entering lots of data. This reduces frustration and wasted time.

Reduces unnecessary submissions

Services avoid processing referrals that were never appropriate in the first place, reducing admin load and improving efficiency.

Improves user confidence

Instant feedback reassures users that they are in the right place before they invest effort.

The image shows a smartphone screen displaying the NHS Referral form. At the top, the time is 9:41, and the signal strength is 5G. The NHS logo and Berkshire Healthcare NHS Foundation Trust are visible. The form is titled 'NHS Referral' and indicates it is 'Step 1 of 3'. Below the title, there is a brief explanation: 'This form helps us assess whether our service is appropriate for your treatment.' The form contains four questions, each with radio button options for 'Yes' and 'No':

- Are you over 18?
- Have you had back pain continuously for over 6 weeks?
- Are you on a cancer pathway?
- Do you have a Berkshire GP?

A blue 'Next' button is located at the bottom right of the form.

Smart Referrals

Step 2. Personal Details...

The referral process continues by collecting only essential personal details about the patient.

Foundational Patient Information

This stage collects personal details required to identify the patient. Demographics such as name, date of birth, are gathered to ensure the referral is tied to the correct individual from the outset.

Context for Clinical Decision Making

The form also captures a concise summary of the referral need. This includes a brief explanation of the issue prompting the referral and urgency.

Supporting Safe and Efficient Processing

By securing accurate identity data and essential referral context early, this step strengthens data quality, reduces the risk of error, and helps services begin processing without delay.

The image shows a smartphone screen displaying the NHS Referral form. At the top, the time is 9:41 and the signal is 5G. The NHS logo and Berkshire Healthcare NHS Foundation Trust branding are visible. The form is titled 'Step 1 of 4 NHS Referral'. Below the title, there is a message: 'You are eligible for treatment with us. This form marks the beginning of your referral process, and all questions must be completed.' There are three input fields: 'First Name', 'Last Name', and 'GP Surgery'. A blue 'Next' button is located at the bottom right of the form.

Smart Referrals



Berkshire Healthcare
NHS Foundation Trust

Step 3. All Other Questions...

The referral process continues by collecting any further questions such as triage and risk.

Why put the complex part last?

Avoids cognitive overload upfront. Users aren't faced with long forms immediately.

Ensures the right users fill the right details

Detailed questions are only shown to those who passed eligibility and completed personal details.

Allows dynamic questioning

The system can tailor questions based on eligibility or personal info (e.g., age, service type, location).

9:41 5G

NHS
Berkshire Healthcare
NHS Foundation Trust

Step 1 of 29

Triage Assessment

Are you feeling depressed?
 Yes No

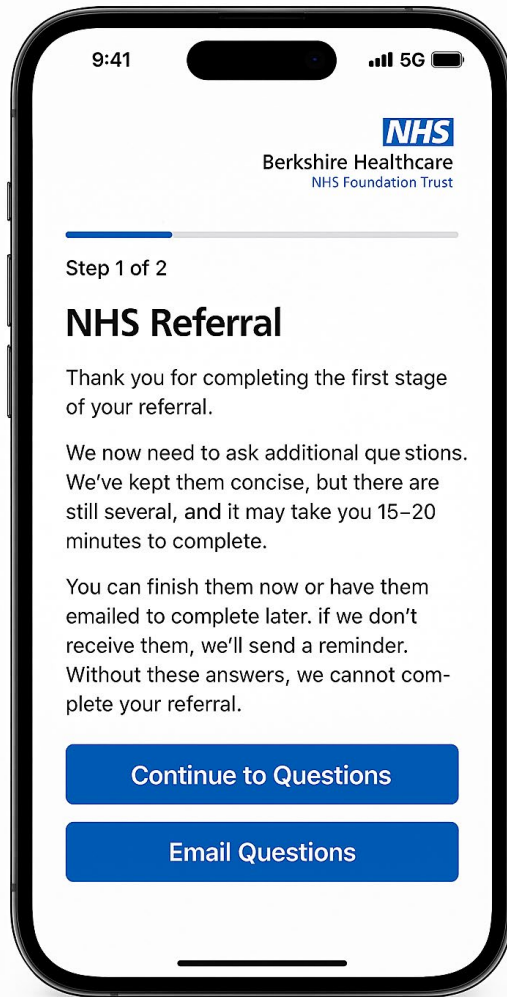
Are you having trouble sleeping?
 Yes No

Do you have thoughts of self-harm?
 Yes No

Do you feel anxious or panic-stricken?
 Yes No

Are you finding daily tasks difficult?
 Yes No

[Next](#)



Now or Later Choice...

After eligibility and personal details are submitted, (Stages 1 & 2) additional information, such as risk and triage questions (Stage 3) are asked, which can be lengthy and complex.

Patients can choose to complete:

- Complete now (in the moment)
- Complete later (secure link emailed / SMS, any time, any device, any place)

Keeping referrals moving: Clear deadlines set by the service and automated reminders if not completed.

If abandoned: Smart Referrals alerts the receiving service, allowing staff to follow up and take appropriate next steps.

Smart Referrals

Notifications...

We confirm with patients that we have received their referral and that it is complete.

Patients are reminded to complete later sections (Step 3).

Services are notified throughout as each referral progresses.

< Inbox 1 of 12 UNREAD ⓘ

NHS Paul Hugo

We have received your referral. Your reference number is 123456789.

< Messages

NHS Paul Hugo

We have received your referral. Your reference number is 123456789.

NHS

45 Park Road Reading Berkshire RG1 2XYZ 9 August 2023

Dear Mr Hugo,

We have received your referral. Your reference number is 123456789.

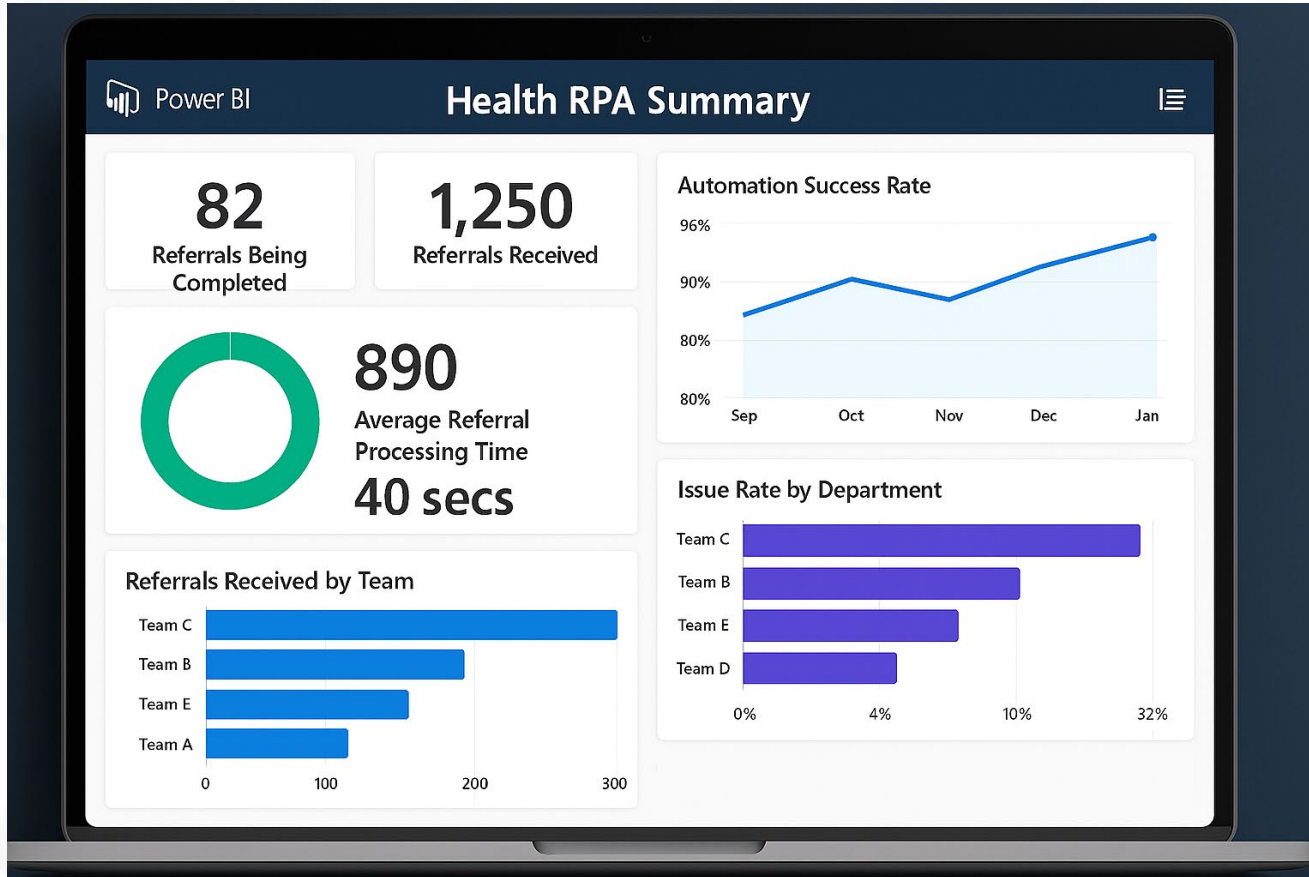
Yours sincerely,

NHS

19 Brook Lane Maidenhead, Berkshire SL6 7XYZ



Smart Referrals



For the first time, you'll gain clear visibility into referral flows across the organisation, with the ability to drill down to team-level performance.

You can track referral volumes, processing efficiency, and quality measures such as errors and rework.

Exception handling is fully monitored, including types, resolution times, and root-cause patterns.

Bot activity is also tracked through success rates, downtime, and backlog levels to show automation stability.