Add or change a referral

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Add referral details for a patient attending a specialist. This adds the referral information required for billing and for Medicare to approve refunds to the patient.

Adding referral information

The section explains how to add the referral details required for billing.

To add referral information:

1. Go to the **Reception** tab.
2. Select **Patients**.

   This will open the **Patient Search** screen.
3. Locate the patient and open their record.

   To learn more, see the find a patient's record article.
4. In the **Referrals** section, select **Add**.

   The **New Referral Details** screen will open.

   By default, the last doctor to provide the patient with a referral will be added.

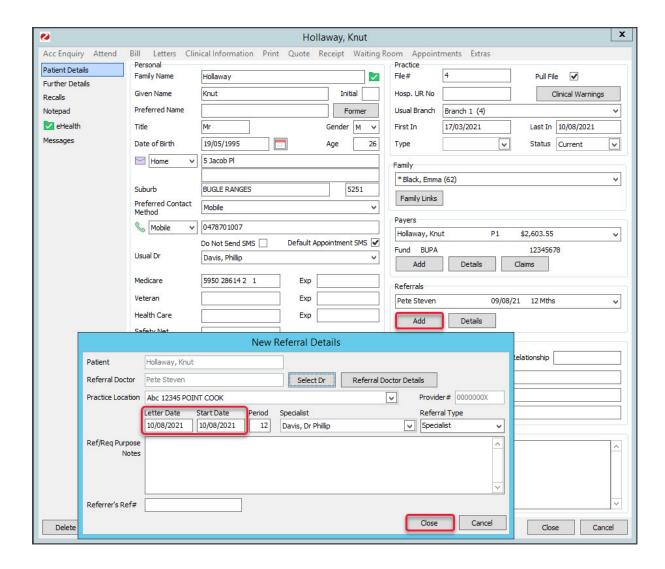   If the referring doctor is different, go to the Changing a referral doctor section below.
5. In the **Letter Date** field, enter the date the GP wrote the letter.
6. In the **Start Date** field, enter the date of the appointment with the specialist.
7. Check the **Period**. It should be 12 by default. This is the number of months within which Medicare will accept a referral for a claim. This 12-month period begins from the **Start Date.**
8. Check and update the **Specialist** field as required.

   If the referral is to be shared between specialists within the practice, or with a locum standing in, you can select **Doctor, Unknown** instead. This permits all doctors to show the referral on their invoices when billing.
9. Check the other fields are correct.

   Adding **Notes** or an internal **Referrer's Ref#** is optional.
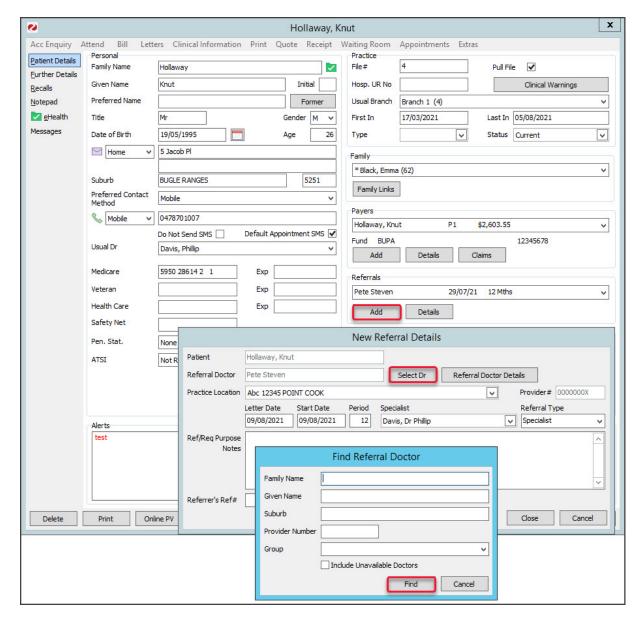10. Select **Close** to save the changes and exit.

Changing the referral doctor

This section explains how to change the referring doctor in the **New Referral Details** screen. You can follow all the steps in the Adding referral information section above, and then complete these steps at the end, before you select **Close** to save and exit.
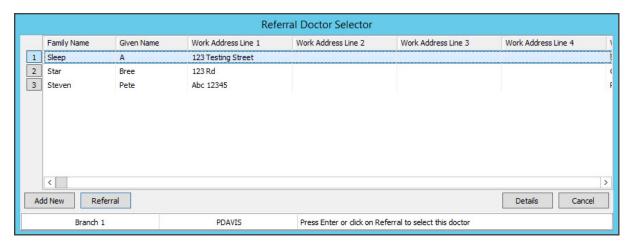
1. Select **Select Dr.** on the **New Referral Details** screen.

   The **Find Referral Doctor** screen will open.

2. Enter selection criteria for the doctor, such as their surname.
3. Select **Find**.

   The **Referral Doctor Selector** will open.

4. Select the doctor from the list.

The list contains all doctors in the practice database.

5. Select **Referral**.

This will take you back to the **New Referral Details** screen, with the new doctor added. You can then complete the fields as documented above, and select **Close** to save and exit.

If the referring doctor is not in the list

6. Select **Add New**.

This will open the New Referral Doctor Details screen.

7. Fill in the screen and select **Close** to save and exit.

This will take you back to the **New Referral Details** screen, with the new doctor added. You can then complete the referral as documented above and select **Close** to save and exit.