

# 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

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 if 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. If your practice uses **Session Count**, enter the number of sessions the referral is for.

For example, if a DVA patient has a referral for 12 sessions, type 12 in the Session Count field.

See the [Session count section](#) below for more information.

10. Check the other fields are correct.

Adding **Notes** or an internal **Referrer's Ref#** is optional.

11. Select **Close** to save the changes and exit.

**Black, Emma**

Acc Enquiry   Attend   Bill   Clinical Information   Print   Quote   Receipt   Waiting Room   Appointments   Extras

### Patient Details

Further Details  
Recalls  
Notepad  
☒ eHealth  
Messages  
Payment Cards

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**Personal**

Family Name: Black ✓  
Given Name: Emma Initial: \_\_\_\_\_  
Preferred Name: \_\_\_\_\_ Former  
Title: \_\_\_\_\_ Sex at Birth: F  
Pronouns: \_\_\_\_\_  
Date of Birth: 13/12/1990 Age: 34  
Home: 30 3rd Street  
Suburb: ELLEN GROVE 4078  
Preferred Contact Method: Branch Default (not set)  
Mobile: 0422803434  
Do Not Send SMS ☐ Default Appointment SMS ☒  
Email: Zedmedt@gmail.com  
Usual Dr: Davis, Phillip  
Medicare: 4950 15233 3 1 Exp: \_\_\_\_\_  
Veteran: QX712347 Exp: \_\_\_\_\_

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**Practice**

File#: \_\_\_\_\_ Pull File ☒  
Hosp. UR No: \_\_\_\_\_ Clinical Warnings  
Usual Branch: Albany Road Clinic ()  
First In: 08/09/2022 Last In: 09/12/2024  
Type: \_\_\_\_\_ Status: Current

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**Family**

\* Black, Emma ()  
Family Links

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**Payers**

Black, Emma P3 \$700.95  
Fund Springs 56699MM  
Add Details Claims

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**Referrals**

Brenda Reed 29/07/24 12 Mths  
Add Details Session Count (1/0)

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**New Referral Details**

Safety Net Patient: Black, Emma  
Pen. Sta. Referral Doctor: Brenda Reed Select Dr Referral Doctor Details  
AT Practice Location: 123 Testing Street SOUTH MELBOURNE Provider# 2054781W  
Ethnicity Set Letter Date Start Date Period Session Count  
10/09/2025 10/09/2025 12 0 (0/0)  
Block patient Specialist Referral Type  
Jackson, Gaye Specialist  
Ref/Req Purpose Notes  
Referrer's Ref#

Alerts

Delete Print Patient Verification Find Close Cancel

## Referral session counts

This optional setting is available in Zedmed v38.7.2 and shows how many sessions a referral is for and how many have been used. The number of sessions the referral is for is added manually, and each time the patient is billed with that referral, the number of sessions used increases by 1.

For example, a patient who is entitled to 3 sessions on a referral would show 2/3 after being billed for 2 sessions.

Referrals

Vivian Mortier	21/07/25	12 Mths	▼
<a href="#">Add</a>	<a href="#">Details</a>	Session Count (2/3)	

Other Contacts

## Enabling referral session count

To enable this feature, select **Practice Setup > Practice > 'Track count of Patient Referral Sessions'** - then reopen Office.

### Session count considerations:

- Voiding an invoice will decrease the used sessions count.
- If your practice invoices cancellations, deselect the referral from the invoice.
- The used sessions count can grow greater than the number of sessions the referral is for.
- The referral must be linked to the invoice when billing.

### Where the session count is displayed

For the most up-to-date documentation version, visit <https://help.zedmed.com.au/help>

- Office: Patient Details - Referrals (referral Details).
- Office: Appointment Details.
- Clinical: Patient Demographics (by referrer name) - For Specialist sites only (Site Type > Specialist under Global Options).

**Jones, Ms Marrianna-Louise**

**Address:** 6 Jones Pl,  
GOWRIE 2904

**DOB:** 19/05/1967

**Age:** 58 years

**Medicare No:** 22980398741

**File No:** 17

**Hosp UR No:**

**MMR Status:** My Health Record available - Consent to Upload

**Referrer:** Dr Vivian Mortier - Session 3/5

**Next Appt:** None scheduled

**Home:**

**Work:**

**Mobile:** 0406991730

**Occupation:**

## Uploading a referral

The referral should be uploaded to the patient's incoming documents.

**Note:** In Zedmed v38 and later, **Incoming Documents** supports the following file types: jfif, pjpeg, jpeg, pjp, jpg, png, pdf

To add the referral to the patient:

1. Open the Patient's record in clinical
2. In **Summary Views**, select **Incoming Documents**
3. Select the paperclip icon.
4. Browse to locate and **Open** the referral.

The location is where the practice saves referrals that are scanned or received via email.

5. The **Image** options screen will open.
6. In the **Description**, type the naming convention used by the practice for referrals.

**Black, Emma**

**Address:** 30 3rd Street,  
ELLEN GROVE 4078

**DOB:** 13/12/1990  
**Age:** 34 years

**Medicare No:** 49501523331

**File No:**

**Hosp UR No:**

**MHR Status:** My Health Record

**Referrer:** Dr Brenda Reed

**Home:**

**Work:**

**Mobile:** 0409211060

**Occupation:**

**Image**

**Document Details**

**Description**  
Referral Emma Black 13-12-90

**Document Date Time**  
19/02/2025 01:02 PM

**Link with Doctor**

User Name	Doctor Code
<input type="checkbox"/> Eason, Dr Augustus	AE
<input type="checkbox"/> Vendor, Dr Ccc Pds	CPV
<input type="checkbox"/> Hatcher, Dr Danni	DH
<input type="checkbox"/> FERNANDEZ, DANUTA	DF
<input type="checkbox"/> Green, Dr Roger	DG
<input type="checkbox"/> Jackson, Gaye	GJ
<input type="checkbox"/> Herman, Grace	GH1
<input type="checkbox"/> Howell, Dr Grenville	GH
<input type="checkbox"/> Fuller, Igor	IF
<input type="checkbox"/> Arthur, Dr Lesley	LA
<input type="checkbox"/> HERNANDEZ, LIVIA	LH
<input type="checkbox"/> Knox, Dr Maurice	MK
<input type="checkbox"/> Davis, Dr Phillip	PD
<input type="checkbox"/> Hedrick, Dr Warren	WH

**Save As:** ☒ Result ☐ Incoming Document

☒ Doctor has already seen this - Mark as Complete

**OK** **Cancel**

**Summary Views**

- Problems
- Referrals
- Results
- Immunisations
- Allergies
- Images/ECG
- Pregnancies
- Documents
- Attachments
- Measurements
- Medications
- Incoming Documents

**Reference View**

**Allergies:** Acrylic acid, amoxicillin

**Warnings:**

7. Select from the options based on your practice workflow:

- Link with Doctor** - if no doctor is selected, all doctors will see the referral if it is marked as incomplete and goes to the Results Inbox.
- Incoming Document** - recommended for referrals and documents.
- Mark as Complete** - if this is not ticked it will appear in the Results Inbox.

**Results Inbox**

**Results**

Showing Records: (1 - 2 / 2) - Sorted By Result Description [Descending]

Get All Results for a Patient

Role: User Roles User: Davis, Dr Phillip (PDAVIS)

Result/Page: 100 Type: All

Patient	Assigned To	Result Reported Date	Result Collected Date	* Result Type	Result Description
Black, Emma	Davis, Dr Phillip (PDAVIS)	19/02/2025		Document	Referral Emma Black 13-12-90
Black, Emma	Administrator (Clinical)	26/07/2024		Result	FBC

8. Select **OK**.

The Referral will be saved.

## 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.

**Hollaway, Knut**

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

**Patient Details**

Personal  
 Family Name: Hollaway  
 Given Name: Knut  
 Preferred Name: [Former]  
 Title: Mr  
 Gender: M  
 Date of Birth: 19/05/1995  
 Age: 26  
 Home: 5 Jacob Pl  
 Suburb: BUGLE RANGES 5251  
 Preferred Contact Method: Mobile  
 Mobile: 0478701007  
 Usual Dr: Davis, Phillip  
 Medicare: 5950 28614 2 1  
 Veteran: [ ]  
 Health Care: [ ]  
 Safety Net: [ ]  
 Pen. Stat.: None  
 ATSI: Not R

Practice  
 File #: 4  
 Hosp. UR No: [ ]  
 Usual Branch: Branch 1 (4)  
 First In: 17/03/2021  
 Last In: 05/08/2021  
 Type: [ ]  
 Status: Current

Family  
 \* Black, Emma (62)  
 Family Links

Payers  
 Hollaway, Knut P1 \$2,603.55  
 Fund BUPA 12345678  
 Add Details Claims

Referrals  
 Pete Steven 29/07/21 12 Mths  
 Add Details

**New Referral Details**

Patient: Hollaway, Knut  
 Referral Doctor: Pete Steven  
 Practice Location: Abc 12345 POINT COOK  
 Letter Date: 09/08/2021  
 Start Date: 09/08/2021  
 Period: 12  
 Specialist: Davis, Dr Phillip  
 Referral Type: Specialist

**Find Referral Doctor**

Family Name: [ ]  
 Given Name: [ ]  
 Suburb: [ ]  
 Provider Number: [ ]  
 Group: [ ]  
☐ Include Unavailable Doctors  
 Find Cancel

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

The **Referral Doctor Selector** will open.

**Referral Doctor Selector**

	Family Name	Given Name	Work Address Line 1	Work Address Line 2	Work Address Line 3	Work Address Line 4
1	Sleep	A	123 Testing Street			
2	Star	Bree	123 Rd			
3	Steven	Pete	Abc 12345			

Branch 1 PDAVIS Press Enter or click on Referral to select this doctor

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.

The screenshot shows a software window titled "New Referral Doctor Details" with a standard Windows-style title bar (minimize, maximize, close buttons). The window is divided into several sections for data entry:

- Identity:** Fields for Family Name, Given Name, Salutation, Title, Mobile, e-Mail, and HPI-I. There are checkboxes for "Available" and "VIP/Favourite". A "Search HI" button is next to the HPI-I field.
- Practice:** Fields for Group (a dropdown menu), Description, and Standard Referral Period (Months). An "Edit" button is next to the Group dropdown.
- Home Address:** Fields for the address, Suburb, and Home Phone.
- Practice Locations:** A section with a "Main" checkbox and a "Provider #" field. Below are fields for Organisation, Address (multiple lines), Suburb, Phone, Fax, and HPI-O. There is a "Search HI" button and "Add New" and "Find" buttons at the bottom of this section.
- Notes:** A large text area for notes with a vertical scrollbar.

At the bottom of the window, there are "Close" and "Cancel" buttons.