

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.

2	Hollaway, Knut	
Acc Enquiry Attend	Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointmen	ts Extras
Patient Details	Personal Practice Family Name Hollaway File# 4	Pull File
Further Details	Given Name Knut Initial Hosp LIP No	Clinical Warnings
Recalls	Dreferred Name	
votepad	Former Usual branch Bra	ncn 1 (4)
	litte Mir Gender M ♥ First In 1//	Last In 10/08/2021
lebbyes	Date of Birth 19/05/1995 Age 26 Type	V Status Current V
	Home V 5 Jacob Pl Family	
	* Black, Emma (62)) ~
	Suburb Bogle RANGES 2251 Family Links	
	Method Pavere	
	Kobile ✓ 0478701007	P1 \$2.603.55
	Do Not Send SMS Default Appointment SMS	12345678
	Usual Dr Davis, Phillip Y Add	Details Claims
	Medicare 5950 28614 2 1 Exp	
	Veteran Exp Referrals	00/09/21 12 Miles
	Health Care	09/00/21 12 Mults
	Safaty Not	Details
	New Referral Details	
Patient	Hollaway, Knut	telationship
Referral Doc	ctor Pete Steven Select Dr Referral Doctor Details	
Practice Loca	cation Abr 12345 POINT COOK	0000000X
	Letter Date Start Date Period Specialist Referral TV	pe
	10/08/2021 10/08/2021 12 Davis, Dr Phillip V Specialist	~
Ref/Reg Purp	rpose	
N	Notes	
		~
Referrer's Re	Ref#	· · · · · · · · · · · · · · · · · · ·

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 conversion used by the practice for referrals.

Black, Emma 🛛 🗶		
Black, Emma		
		<u> 8</u>
Address: 30 3rd Street	t,	
ELLEN GROV	E 4078	
DOB: 13/12/1990	Home:	
Age: 34 years Medicare No: 49501523331	Mobile: 0409211060	
File No:	Occupation:	
Hosp UR No:	Image	×
MHR Status: My Health Re	ecord	~
Referrer: Dr Brenda Re	Document Details	
	Description	
R 🖹 B 🖄 📖 🗃 🗖	Referral Emma Black 13-12-90	
WIIOWE	Document Date Time	12
Summary Views	19/02/2025	1:02 PM
Problems 🕕	Link with Destar	
Referrals		Doctor Code
Results	Eason Dr Augustus	AF
Immunications	Vendor, Dr Ccc Pds	CPV
	Hatcher, Dr Danni	DH
Allergies	FERNANDEZ, DANUTA	DF
Images/ECG	Green, Dr Roger	GL
Pregnancies	Herman, Grace	GH1
Documents	Howell, Dr Grenville	GH
Attachments	Fuller, Igor	IF
	HERNANDEZ LYDIA	LA
Measurements	Knox, Dr Maurice	MK
Medications	Davis, Dr Phillip	PD
Incoming Documents	Hedrick, Dr Warren	WH
Reference View		
Allergies Acrylic acid, amoxicillin	Save As: Result O Incor	ning Document
Manala and	Doctor has already seen this	- Mark as Complete
warnings:	✓ <u>о</u> к	X Cancel

- 7. Select from the options based on your practice workflow:
 - a. 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.
 - b. Incoming Document recommended for referrals and documents.
 - c. 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 [D	escending]		
⇔ H < ► H Result/Page 100 √ Typ	₩ 1 Ø 🖶 🐝 Ge to e All 🗸	t All Results r a Patient Role User Roles ~ 1	User Davis, Dr	Phillip (PDAVIS) 🗸 🗸
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.

0			Hollaway, K	nut			X
Acc Enquiry A	Attend Bill Lette	ers Clinical Information	Print Quote Receipt	Waiting Room	Appointments Extra	as	
Patient Details	Personal Eamily Name	Uallaway		Practice	4	pull site	
Eurther Details	Family Name	noilaway		FIIC#	ч 		
<u>R</u> ecalls	Given Name	Knut	Initial	Hosp. UR No		Clinical Warnings	
Notepad	Preferred Name		Former	Usual Branch	Branch 1 (4)		~
🔽 <u>e</u> Health	Title	Mr	Gender M 🗸	First In	17/03/2021	Last In 05/08/2021	
Messages	Date of Birth	19/05/1995	Age 26	Туре	~	Status Current	~
	Home 🗸	5 Jacob Pl		Family			
				* Black, Emma	a (62)		~
	Suburb	BUGLE RANGES	5251	Constitution la	1		
	Preferred Contact Method	Mobile	¥	Family Links			
	& Mobile	0478701007		Payers			
		Do Not Send SMS	efault Appointment SMS	Hollaway, Knu	ut P1	\$2,603.55	~
	Usual Dr	Davis, Phillip	v	Fund BUPA		12345678	
				Add	Details	Claims	
	Medicare	5950 28614 2 1	Exp	Referrals			
	Veteran		Exp	Pete Steven	29/07/2	21 12 Mths	~
	Health Care		Exp	Add	Dotaile		
	Safety Net			Add	Details		
	Pen, Stat.	None		New Refer	ral Details		
	ATSI	Not D Patient	Hollaway, Knut				
	1.54	Referral Doctor	Pete Steven		Select Dr Defer	ral Doctor Details	
		Deseñes Lossfer			Kelen		
		Practice Location	ADC 12345 POINT COOK	Devied Creek			
	1049 BI		09/08/2021 09/08/2021	12 Davi	alist is. Dr Phillin		
	Alerts	Def/Dee Durgees					=
	test	Notes					<u>^</u>
			Fir	nd Referral D	octor		
			Family Name				~
		Deferrer's Def#	Given Name				
		Referrers Ref#	Suburb				
Delete	Print Onli	ne PV	Provider Number			Close Cano	el
			Group				
			Ind	ude Unavailable [octors		
				C	Find Cance	el	

- 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			ŧ	
	<					>	
A	dd New Refe	erral				Details Cancel	
	Branch 1		PDAVIS	Press Enter or click on Re	eferral 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.

0		New Referral	Doctor Details	x
Identity	r		Practice	
Family Name	<u> </u>		Group	✓ Edit
Given Name			Description	
Salutation			Standard Referral Period	(Months)
Title	Mobile		Home Address	
e-Mail				
HPI-I		Search HI		
✓ Ava	ilable	VIP/Favourite	Suburb	
Practice Locations			Home Phone	
	Main Provider #	#		
Organisation			Notes	
Address				
Suburb				
Phone				
Fav				
HPLO		Course HT		
		Search HI		
•		Add New		<u>~</u>
Label	I			Close Cancel