

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.

The screenshot shows a patient record for 'Hollaway, Knut' with a 'New Referral Details' dialog box open. The dialog box contains the following information:

Letter Date	Start Date	Period	Specialist	Referral Type
10/08/2021	10/08/2021	12	Davis, Dr Phillip	Specialist

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.

The screenshot shows a software interface for a patient named Hollaway, Knut. A 'New Referral Details' dialog box is open, allowing the user to enter referral information. The 'Referral Doctor' field is set to 'Pete Steven'. A sub-dialog 'Find Referral Doctor' is also open, with the 'Find' button highlighted. The main dialog has several fields: 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), and Referral Type (Specialist). The 'Find Referral Doctor' sub-dialog has fields for Family Name, Given Name, Suburb, Provider Number, and Group, with an 'Include Unavailable Doctors' checkbox and 'Find' and 'Cancel' buttons.

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

The **Referral Doctor Selector** will open.

The 'Referral Doctor Selector' dialog box displays a table of potential referral doctors. The table has columns for Family Name, Given Name, and Work Address Line 1, 2, 3, and 4. Three doctors are listed: Sleep A (123 Testing Street), Star Bree (123 Rd), and Steven Pete (Abc 12345). The 'Referral' button is highlighted.

	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			

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.

New Referral Doctor Details

Identity

Family Name

Given Name

Salutation

Title Mobile

e-Mail

HPI-I

Available VIP/Favourite

Practice

Group

Description

Standard Referral Period (Months)

Home Address

Suburb

Home Phone

Practice Locations

Main Provider #

Organisation

Address

Suburb

Phone

Fax

HPI-O

Notes