

Add a patient 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.

The screenshot displays the Zedmed software interface for patient management. The 'Patient Details' section is active, showing information for Emma Black, born 13/12/1990, residing at 30 3rd Street, Ellen Grove. The 'Referrals' section on the right lists a referral by Brenda Reed, dated 29/07/24, for 12 months, with a session count of 1/0. The 'Add' button for this referral is highlighted with a red box.

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.

This close-up view of the 'Referrals' section shows a dropdown menu with 'Vivian Mortier' selected. The date is '21/07/25' and the duration is '12 Mths'. Below the dropdown are buttons for 'Add', 'Details', and 'Session Count (2/3)'. A mouse cursor is pointing at the 'Session Count (2/3)' button.

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

- 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**

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]

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, Philip
 Medicare: 5950 286 14 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
 Ref/Req Purpose:
 Notes:
 Referrer's Ref#:
 Provider #: 0000000X
 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			

Add New Referral Details Cancel

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.

1. Select **Add New**.

This will open the New Referral Doctor Details screen.

2. 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 Locations

☒ Main

Provider #

Organisation

Address

Suburb

Phone

Fax

HPI-O

Search HI

Add New

Practice

Group

Description

Standard Referral Period (Months)

Home Address

Suburb

Home Phone

Notes

Label

Find

Close

Cancel