

# Write a referral letter

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A standard referral can be printed out, sent to a provider using secure messaging and sent to a patient using Secure Send. If you write a CDA letter, which is the default for specialists, it will be sent to MyHealth Record as a CDA form.

# Write a referral letter

Write a referral letter to a specialist or healthcare service provider.

#### **Considerations:**

- Secure Send can be used to make SMS or Email referrals to patients in Zedmed v36.5 and later.
- Secure messaging requires recipients to be set up in the Address Book with a messaging provider (e.g. HealthLink).
- Referrals support **Document versioning** in Zedmed v37 and later.

#### To write a referral letter:

1. Start an encounter with the patient.

For a detailed explanation, see the Start an Encounter article.

When the encounter starts, the Current Encounter pane will open and display the clinical modules.

2. Select **Referrals** from the Current Encounter menu.

Current En	counter	- Duration:	00:17:33								Parent A
아 Problems	⊖⊗ <sub>Drugs</sub>	<b>Observations</b>	Referrals	Allergies	A Diagrams	Templates	Add Problem	ලූල Del Problem	Calculators	Histories	

This will open the Referral Selection screen.

3. Select the **Referral Letter** tab.

# Selecting the recipient

4. Select the Search icon to open the Address Book Search screen.

Referral Selection	
Past Referrals New Referral	
Pathology Radiology Referral Letter	
Addressee	Templates
Free Text Addressee Copy To	Document Ref Letter - Standard
Adelaide Path Partners	Summary
Referrals Default Address Book Selection	×
Letter Subject: Zedmed now supports HealthShare Referrals, a com date practitioner directory including sub-specialties	prehensive, up-to- , special interests Other
and health fund gap scheme participation.	n (n ) 00/11/0000 🔽
Would you like to change your default Address Boo	k to use HealthShare
Referals? You will still be able to use your local Zed but HealthShare Referrals will appear by default.	med address book, Exam Date: 10/04/2024 IVprist: PDAVIS
	No Result Expected
Zedmed HealthShare	
Ask every time	Send as CDA / e-Letter
Today's referrals	Current Encounter
Addressee / Details Problem	Undefined Problem
	RFE: Use Coded RFEs Management Plan
Secure Send	
Print Referrals Print Referrals and Close HealthLink Forms (Referral)	✓ <u>Q</u> K ¥ <u>C</u> ancel

5. Add an addressee from the Zedmed (practice Address Book) or HealthShare (Zedmed v36.3.3 or later).

You can set your preferred default.

#### From the Address Book

Contains practice-defined addressees, which can be set up for secure messaging. To learn more, see the Address Book guide.

a) Enter the specialist's family name into the Name field and select Find.

You can view all the recipients available by selecting **Find** and leaving the **Name** field blank.

b) Double-click on the specialist's name to add them as the Addressee.

#### From the Healthshare Directory

Printed referrals for specialists and allied health providers. For detailed instructions, see our Clinical HealthShare guide.

a) Type in the Practitioner name, Practice name or Specialty name.

b) Select one of the results displayed to add it as an Addressee.

- 6. Use the **Copy To** field if you want to cc another practitioner.
- 7. Optional: Use the **Letter Subject** field to add an internal description to the referral. This text will not be included in the referral.

# Composing the referral letter

8. Check the correct letter template is being used.

The **Document** field (under Templates) shows the selected template. Use the search option to select a different template.

9. Select Write Letter.

Some templates may prompt you to respond to dialogues before opening the referral.

The referral will open and key details will be filled in.

**Optional: Send as CDA/eReferral:** creates the referral using a CDA form that can be uploaded to My Health Record.

- 10. Type in any required information.
- 11. If you want to attach **results**:
  - a. Select View > DataToolbar.
  - b. Expand the section called Extra Clinical Data.
  - c. Double-click Documents, Images or Incoming Documents.

The selection depends on how the results were received by Zedmed.

d. Select the result you want to attach.

Note: **PDFs** are not supported.

e. Click **OK**, and the selected item will be attached to the letter.

0	Letter Writer	_ 🗆 X
File	Edit View Insert Format Voice Tools Table	
	Image: Sever Rows Rows and Vite View Sever Rows Rows Rows Rows Rows Rows Rows Rows	
	Alberty Bood Clinic	Boundadeals     Treating Doctor     Head of Family     Miscellaneous     Practice     Practice
.3.1.2.1.1.1	Albany Road Clinic 343 Albany Road SOUTH MELEQURNE 3205 Phone: 03 5550 3256 Fax:	Copy To Dectors  Pregnancy  Extra Clinical Data  Attachments Documents First Encounter Date Images
1 - 4 - 1	Dr Phillip Davis FRACCP, MBBS, BBiomedSci (Hons), Clin Dip Pall Med 2121331W	Incoming Documents Last Encounter Date
0	In May 2023	s 💌
1 9 1 1 2 1 1 8 1 1 6 1	Nack Tester1       Selected report trying to import images.         Nack Tester1       Please select images that should be included         107 ADRIATIC CCT       Description         CLIDE 3978       Image X Arm         Dear Mack Tester1.       Blood	into report           Saved         ∧           15/05/2023         27/04/2023           12/04/2023         ≡           16/03/2023         ■
211111110	Re: Mr Knyt Hollowa 5 Jacob Pl BUGLE RANGES My record no.: 4	v
3- 1-1	Thank you for seeing Knut, aged 70 yrs, for	V DK X Cancel
5 - 1 - 1 4 - 1 - 1	Presenting Problem :	
E I		
1 - 16	Pan in shoulder	✓ Insert Data
Pa	ge 1 Modified	

- 12. If you want to add clinical information:
  - a. Select View > DataToolbar.
  - b. Locate the clinical information by expanding the categories.
  - c. Select a space on the referral letter.
  - d. Double-click the information you want to add.

If the option you selected has no information, nothing will be added.

13. Additional options.

Auto Text can be selected from the Tools menu and allows you to add pre-written text to the letter.

The PDF icon on the top right will export the letter as a PDF.

# Sending the referral letter

14. Sending the referral letter

You can now print the letter out for the patient or send it to the addressee via secure messaging (HealthLink, etc.)

For telehealth or patients who may need an electronic copy, you can also Securely Send the referral to the patient.

# > Option 1 - Print the referral

a) Select **File** >**Save** from the top menu.

- b) Select Close.
- c) Check that the printer contains the correct paper.
- d) Select **Print Referrals** and review the print options.
- e) Select OK.

The referral will be saved in **Summary View > Documents > Referral Letters**.

> Option 2 - Send to addressee using Secure Messaging (HealthLink, etc.)

a) Select File > Distribute.

b) Select **Yes** when prompted to save the document.

c) Check that **Send electronically to all electronic recipients** is selected.

d) Select OK.

Use the Outbox Viewer to see your sent secure messaging messages.

# > Option 3 - Send to the patient using Secure Send

Zedmed v36.5 or later. Email or ZedSMS the referral to the patient or NOK Payer. Available from the **Distribute** screen or for saved letters from **Today's Referrals**. See the **Patient FAQ** and **Secure Send guide**.

From Distribute > Send to Patient:

- a) Select Recipient Email or Recipient Mobile, depending on the patient's preference.
- b) Optional: Copy To Mobile or Copy To Email fields using the Clinical Address book.
- c) Optional: Pin not required (v37 and later). Overrides the security code requirement.
- d) Select Send.
  - A Delivery Successful message will display.
  - The patient will receive a link to download the referral, which will be useable for 7 days.

To view the patient's steps, see the Secure Send guide.

# Using Send a Copy to:

- Additional recipients can be added using a comma.
- Important: If an incorrect email or mobile number is used, the unintended recipient will be able to access the documents.
- To remove a CC: use right-click > Remove.
- The HealthShare directory can be used but only for email delivery.

• The CC is different to the referrals **Copy To** field that is used if you want to notify a practitioner of the requested test.

File Edit View Insert F	Print/Send	
Save	Interim Brint (does not shange the queue)	
Page Setup		
A Print Preview	Add to distribution queue if not already queued	
Print	OA Secure Messaging ent previously	
Distribute	Distribute Nov	
Properties	Send electronically to all electronic recipients	
Cancel Distribution	Print Document	Print Envelopes
Close	Document printing preferences	Envelope printing preferences
	Print out per recipient	Print an envelope for each paper recipient
		O Print an envelope for primary recipient only
	Print a copy for each paper recipient	O Print an envelope for CC recipients only
	Print a copy for file	
	Send to Patient	
	This will send a download link for the selected	file to Patient/Payer via Email and/or SMS. The
	download will prompt for a one-time password	on the respective email/mobile no.
	Patient Holloway, Andrea	
	Payer Holloway, Andrea V	
	Notifications to be sent	
	Recipient Email barryhart81@gmail.co	m
	Recipient Mobile 109 211 060	
	Secure Send	
	Pin not required (cess secure)	
	Send a copy to	
	Copy To Email	Copy To Mobile
	ц ц ц	Q
	O Print envelopes without tracking	
		V OK 👗 Cancel 🦿 <u>H</u> elp

#### > Option 3 - Secure Send from Today's Referrals

a) Save the referral letter, and it will appear under Today Referrals.

#### b) Select Secure Send.

The Send screen will open and is completed a detailed in the section above.

Today's referrals				
Addressee	Details	Problem	Clinica	
Dr Vivian Mortier	Ref Letter - DG	Undefined Problem		
<			>	
Secure Send				
Print Referrals	Print Referrals and Close	H <u>e</u> althLink Forms (	Referral)	

# Write a CDA (specialist) letter

Write and deliver an eReferral using the CDA (Clinical Document Architecture) format. CDA is selected by default for specialists and allows the referral to the uploaded to My Health Record (MHR).

# **Requirements:**

- The practice must have its HPI-O loaded in Zedmed and a NASH certificate.
- The practitioner needs an HPI-I number.

• For referrals (CDA letters), Clinical Address Book addressees must have an HPI-I number and an HPI-O for their practice.

# **Considerations:**

- Quick Documents can also be used to write letters back to referrers.
- To upload to MHR, the letter must meet the MHR requirements.
- CDA can be deselected by default in Clinical's Tools > My Options > My Health Record > Referrals.

#### To write a letter or referral using a CDA form:

1. Start an encounter with the patient.

For a detailed explanation of how to do this, see the Start an encounter article.

2. Select **Referrals** from the **Current Encounter** menu.



This will open the **Referrals** screen.

- 3. Select the Specialist Letter / Referral Letter tab.
- 4. In the **Addressee** field, add the referrer the letter is for.

Enter the name in the field provided, then select the search icon and double-click the addressee's name from the list. You can also select the search icon with a blank field, then select **Find** and **Yes** to view all addressees.

- 5. Use the **Copy to** field if you want to cc another practitioner.
- 6. Use Letter Subject to add an internal description to the referral. This will not be included in the letter itself.
- 7. Check that Send as CDA/e-Letter is selected.
- 8. Select Write Letter.

Referral Selection						
Past Referrals New Refe	rral					
Pathology Radiology	Specialist Letter					
Referrals	ressee ee Text Addressee tier, Dr Vivian Iress BOURNE 3051	To Tivian Mortier C Tester2	Templates Document Ref Summary	Letter - DG		
Letter Subject:						
				Other Ref Date Exam Date	:: 28/08/2023 :: 15/10/2024 :: 15/10/2024 :: CDA / e-Letter	Typist: PDAVIS
To dou's seferents			Current Engenerat			
Addressee	Details	Problem	Undefined Prob	er	Use Coded R	FEs Management Plan
<		>				
Secure Send						
Print Referrals	Print Referrals and Close	HealthLink Forms (Referral)			✓ <u>о</u> к	X Cancel

The form will open with the title Specialist Letter (for specialists) and eReferral (for doctors).

9. Enter the information, including the Response Details (for specialists) or Referral Reason (for doctors)

eReferral		- 🗆 X
Patient Details Doctors		
Name         MCINTYRE, Goldie         IHI ✓         8003 6086 6689 3235         File No         65         Phone         0422 555555         ATSI         Not Recorde	d	
DOB 25/04/1959 Sex Female Address 46 Hiram Cir, BOCOBRA, 2865 Email		
Medicare Card 29532965711 DVA		
Source Allergies I	fedicine	_
Specialist Letter		- • ×
Patient Details Specialists		
Name         Holloway, Mr Knut         IHI          28003 6083 3339 0375         File No         4         Phone         0491 570 006         ATSI         Not Rect	rded	
DOB 19/05/1952 Sex Male Address 5 Jacob PI, BUGLE RANGES, 5251 Email rickd@ze	dmed.com.au	
Medicare Card 5950286142 DVA		
Jump to> Source Allergies M	edicine History Diagnostic	
Document Author		
Doctor Name Eason, Augustus (AE) V HPI-I Healthcare Role General Medical Practitioner		~
Clinic Name Albany Road Clinic V HPI-0 8003 6282 3336 7349 Clinic Address 343 Albany Road SOUTH ME	LBOURNE 3205	
Is Usual GP Clinic Phone 03 5550 3256	Clinic Fax	
Usual GP		
Address Book 7 Treating Doctors		
Doctor Name HPI-I Healthcare Role General Medical Practitioner		~
Clinic Name HPI-0 Address		
Phone	Fax	
Referrer		
Address Book Doctor Name Mack Tester1 Address 107 ADRIATIC CCT CLYDE 3978		
HPI-I         8003614900040781         Organisation         General Practice North         Phone         0422555555	Fax	
CC to: Doctor Name Phone Address		
X Del		
Response Details		۲
Date of Letter 8/05/2023		
Mandatory Field		
Response		
Allergies and Adverse Reactions		۲
Reason for nothing Agent Reaction Description		
listed / selected Penicillin V Potassium Tablets, USP (Rising Health) Adverse reaction		
Cows Milk Adverse reaction Adverse reaction Adverse reaction Skin		
aspirin (Mild)		
Mild)		
Medicine		۲
Resear for nothing		,
	Save Draft Next (preview)	X Cancel

Save Draft will save the letter in Summary Views > Referrals with a D (draft) icon.

Right-click > **Edit** the letter to resume.

10. Select Next (preview).

The Specialist letter/eReferral will open. The example below shows an eReferral.

- 11. Review the letter's content.
- 12. Select Confirm Content and Send.

• **Confirm Content Without Sending** saves the eReferral to **Summary Views > Referrals** with an A (Approved draft) icon.

- Right-click > Send to My Health Record will reopen the eReferral at the Confirm Content and Send step.
- 13. Select **OK** on the **Referrals** screen to close and exit.

2		eReferral	_ □	x
<b>२ २ २ ४ ४ ४ २</b> म	- • • • <b>6</b>	Mousewheel zoom control		
Goldie <b>MCINTYRE</b>	( DoB 25 Apr 1959 (63y*) SEX Female	<b>2-Referral</b> 16 Feb 2023 IHI 8003 6086 6689 32	35	^
	STAR	T OF DOCUMENT		
Albany Road ( Author Dr Phil Phone 03 555	Clinic lip Davis (General Medical Practitioner) 10 3256			
Referral Detail				
Reason for Referral				
Test reply to referred for I	MHR			
Date and Duration				
Date		Duration		
16 Feb 2023 15:32:09+1	100	16 Feb 2023 -> 16 Aug 20	023	
Adverse Reaction	IS			
No Adverse Reactions are s	supplied			
Medications				
Medications				
Medication		Directions		
Temazepam 10mg Oral Ta	ablet 10mg [25]	TAKE 1 NOCTE		
Medical History				
This section contains no en	tries.			
	ADMINI	STRATIVE DETAILS		L
a.v				
Name	Goldie MCINTYRE	Name	Dr Phillip Davis (General Medical Practitioner)	
Sex	Female	Organisation	Albany Road Clinic	
Indigenous Status	Not stated/inadequately described	Work Place	343 Albany Road, SOUTH MELBOURNE, VIC,	
Date of Birth	25 Apr 1959 (63y) * Age is calculated from date of birth	Phone	3205, Australia 03 5550 3256 (Workplace)	
IHI	8003 6086 6689 3235	- Hone	05 5550 5250 (Workplace)	
Entitlements	29532965711 (Medicare Benefits)	Clinical Document Det	ails	
Home Address	46 Hiram Cir, BOCOBRA, NSW, 2865, Austral	ia Document Type Creation Date/Time	e-Referral	~
Upload a copy to the My Healt	Record.			
Actions				-
Back Confirm Content Without Sending	Confirm Content and Send		Close	

If the requirements listed at the start of this guide are met, the letter will be:

• Uploaded to the patient's My Health Record.

You can check the upload in the My Health Record Document UI.

• Sent to the addressee via a secure messaging service.

You can check the Addressee received the eReferral in the Outbox viewer.

# 14. Print the letter out if required.

While the encounter is open, the letter can be printed by right-clicking it and selecting **Reprint Referral**.

Refe	errals for: M	CINTYRE, Goldie	_ 0	x
Referral Selection				
Past Referral New Referral				
Pathology Radiology Referral Letter				
Addressee		Templates		
Copy To		Document (None)		
Address	$\sim$	Summary (None)		
Latter Subject				
			Other	
			No Result Expected	
			Freek	
			Send as CDA / e-Letter	er 🔰
Todavs referrals		Current Encounter		
Addressee / Details	Problem	Undefined Problem No Kno	own Allergies (recorded 16 Feb 2023)	
Mack Tester 1 eReferral	Undefined F	DEE-		t Plan
Edit				critari
Delete				
Reprint Referral				
		Rx: Temazepam 10m	ng Oral Tablet 10mg [25] - Qty: 1*25 Rpts: 0 - TAKE 1 NOCT	E
		Referral: eReferral - I	Mack Tester1	
	>			
Print Referrals			? Help ✓ QK Х ⊆апс	el