

Write a referral letter

Last Modified on 29/04/2024 9:56 am AEST

Write a referral letter to a specialist. The letter can be printed or sent electronically to an addressee using secure messaging. With Zedmed v36.5 and later, you can **securely send** the referral to the patient using SMS or Email (ideal for telehealth).

Secure messaging requirements:

- Zedmed supports Argus, HealthLink, Medical Objects and Promedius secure messaging services.
- The practice distributing the letter must be set up with the same secure messaging service as the recipient.
- The recipients must be set up in the **Clinical Record Address Book** with the secure messaging service they use.

Secure Send requirements:

- Secure Send uses **electronic signatures** and must be set up by the practice, as detailed in the **Secure Send guide**.

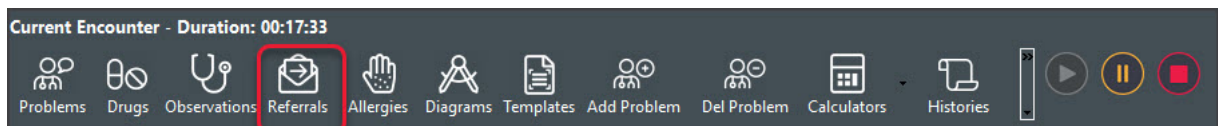
To write a referral letter:

1. Start an encounter with the patient.

For a detailed explanation of how to do this, 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.



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.

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, which allows you to upload the referral to the patient's My Health Record. To learn more, see the [CDA letter guide](#).

10. Type in any required information.

11. If you want to attach results:

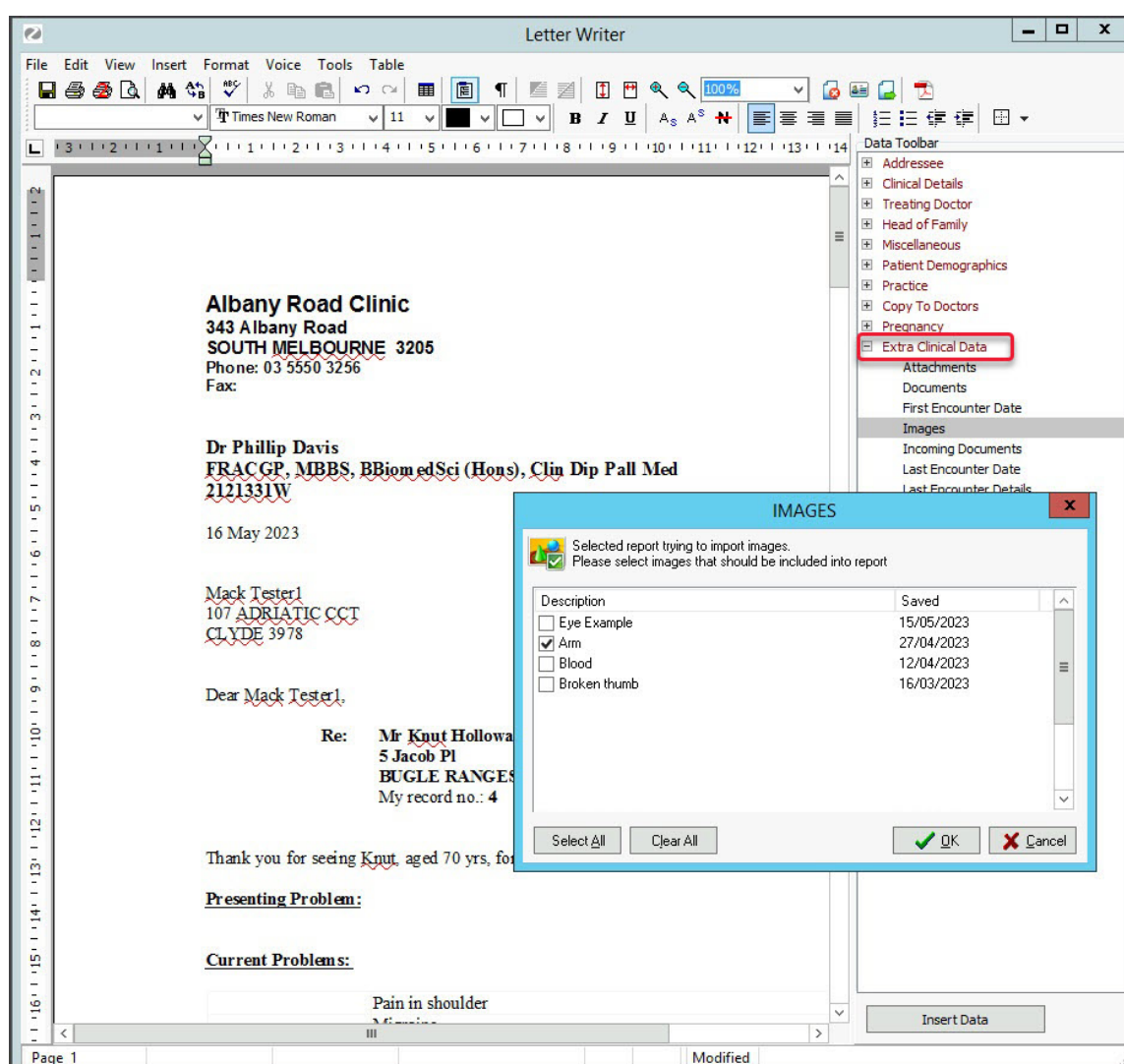
- a. Select **View > DataToolbar**.
- b. Expand the section called **Extra Clinical Data**.
- c. Double-click **Documents, Images or Incoming Documents**.

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.



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 (Argus, 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

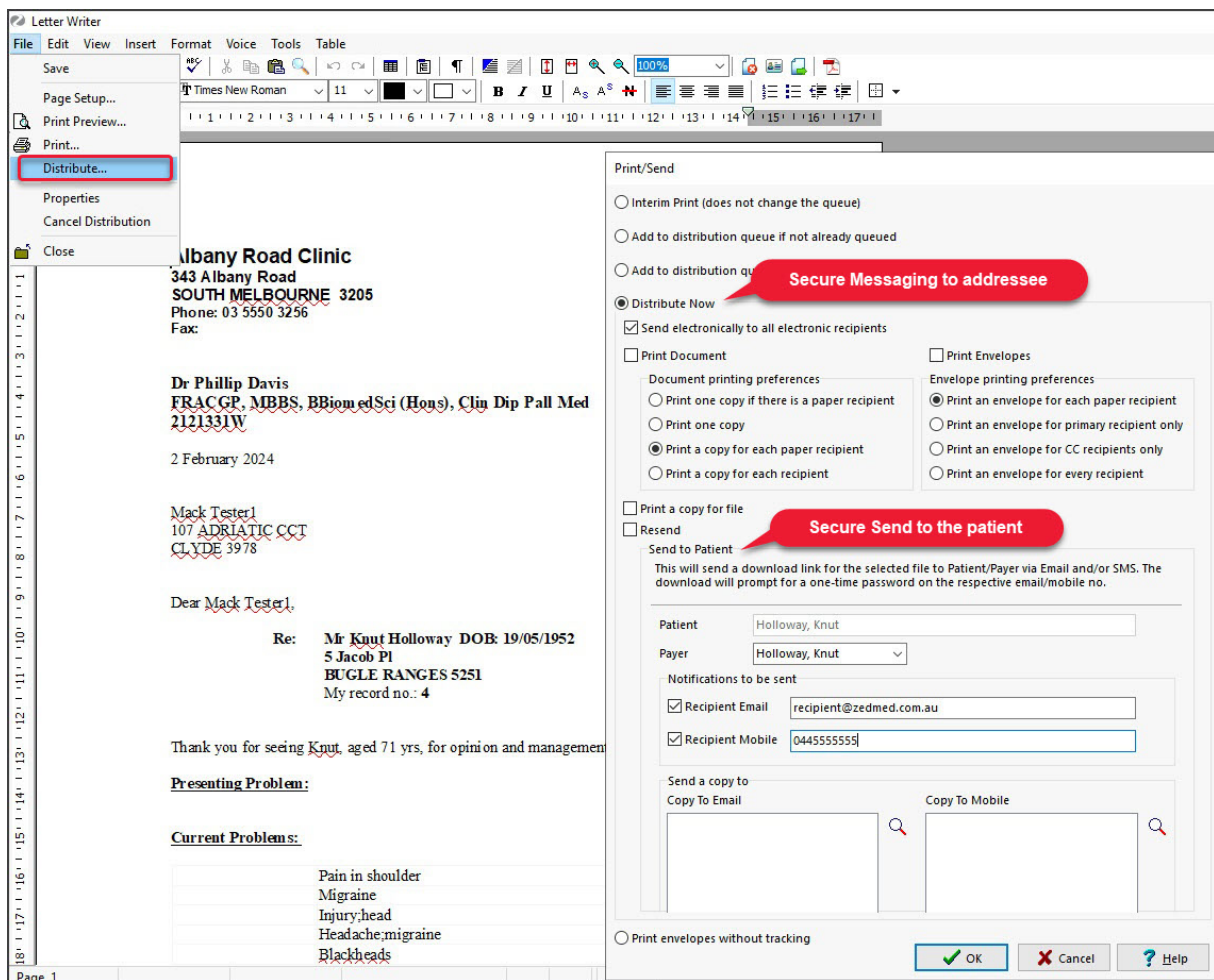
- a) Select **File > Save** from the top menu.
- b) Select **Close**.
- c) Check that the printer contains the correct paper.
- d) Select **Print Referrals** and review the print options.
- e) Select **OK**.

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

Option2 - Send to addressee using Secure Messaging (Argus, 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.



Option3 - Send to a patient using Secure Send

Secure Send (Zedmed v36.5 or later) uses email or ZedSMS to send a referral to the patient or NOK Account Payer using a link to a secure download page. To learn more, see the [Patient FAQ](#) and dedicated [Secure Send guide](#).

a) Select **Secure Send**.

The **Secure Send** button will open the **Send** screen for the referral in the **Today's Referrals** section.

b) Review the **Send** dialog.

- The title will show the referral's details.
- Select **Recipient Email** or **Recipient Mobile**, depending on the patient's preference.

Additional recipients can be added using a comma.

Caution - if an incorrect email or mobile number is used, the unintended recipient will be able to access the documents.

c) Optional: **Copy To Mobile** or **Copy To Email** fields using the Clinical Addressbook.

To remove a CC: use right-click > Remove. The **HealthShare** directory is only available for email delivery.

Note: This is different to the referrals **Copy To** field that is used if you want to notify a practitioner of the requested test.

d) Select **Send**.

A message will display that includes the text 'Delivery successful'.

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](#).

'Template not found' will appear if the referral addressee does not have the Zedmed [pathology or radiology](#) template.
