

# Write a pathology referral

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Create a pathology referral and print it for the patient or **Securely Send** the referral to the patient using SMS or Email (ideal for telehealth). Secure Send requires Zedmed v36.5 or later.

## Quickstart video

### Considerations:

- To reprint or delete a referral, see the [Summary Views article](#).
- **Secure Send** uses a generic Pathology Referral template with an **electronic signature**.
- The Secure Send template **must be set up** as generic addressees in the Address book.
- Results sent back electronically go to the **Results inbox** and printed results can be scanned into the Results inbox.
- The **HealthShare** integration can be used to cc: a practitioner to notify them of the requested pathology test.

## Create a pathology referral

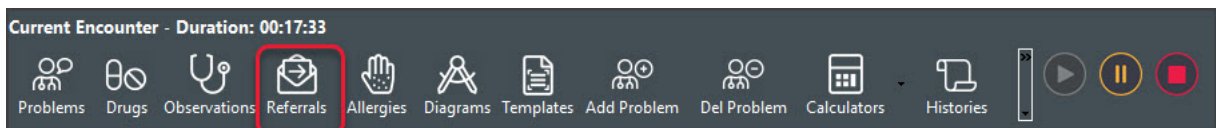
To create a pathology referral:

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.

The **New Referral > Pathology** tab is selected by default.

### Selecting the recipients

3. In the **Addressee** field, the preferred lab will be selected.

You can use the drop-down list to select a different addressee.

**Note:** To use **Secure Send** (e.g. telehealth consultation), select an addressee linked to the 'Zedmed-Pathology Referral' template (generic pathology format that adds your electronic signature). The practice creates these addresses.

- Use the **Copy To** field if you want to notify a practitioner of the requested test.

You will be asked if you want to print a copy for the cc'd practitioner when distributing the referral.

- Select the **Copy to Search** icon to open the **Address Book Search** screen.
- Enter the practitioner's name into the field provided and select **Find**.
- Double-click the name to add it to the **Copy to** field.

### Composing the referral

- Enter the **Clinical Notes**.

Type your notes into the text box. You can also add each condition by selecting those listed under **Clinical Notes**.

- Add the test required.

Double-click any test shown in the **Favourites**, **All** or **Groups** tabs to add it to the **Selected Tests** section.

- To locate a test in **All**, start typing in the test's name or use the sidebar.
- To create a new test, right-click the **All** tab, select **Add test**, enter a name and select **OK**.
- To add a test to the **Favourites**, right-click the test and select **Add to Favourites**.
- To delete a test or remove a favourite, use the right-click menu.

- Adding **Groups**.

The **Groups** tab contains groups of tests for a specific condition. Double-clicking a group will add all the tests

to the **Selected Tests** section. To learn more, see the [Maintain test Groups section](#) below.

8. Review the tests selected.

To remove a test, right-click it and select **Remove**.

The right-click menu also allows you to manually enter a new test and change a test's name.

9. Review the My Health Record settings.

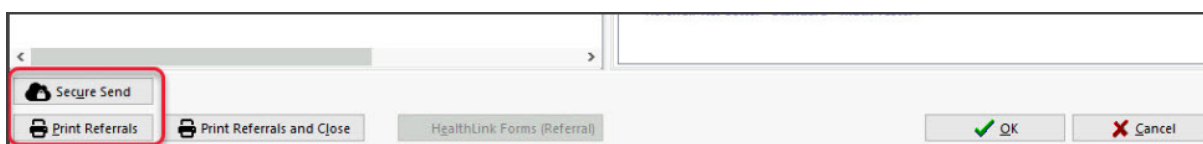
Results are uploaded to **My Health Record** by the laboratory if the patient has not opted out of MHR. Tick **Do not send reports to My Health Record** if you do not want the lab to upload them. To view the settings, see [Set up My Health Record](#).

## Sending the referral

10. Select **Order Test**.

This moves the test to the **Today's Referrals** section.

11. **Print the referral - or - securely send it to the patient.**



### Option 1 - Print Referrals

a) Check that the printer contains the correct paper for the laboratory.

b) Select **Print Referrals** and confirm that the right paper is inserted.

All referrals in **Today's referrals** that have not been printed will print. You will be prompted to confirm copies for cc'd doctors.

### Option 2 - Secure Send

Secure Send uses email or ZedSMS to send a referral to the patient or NOK payer using a link to a secure download page.

This referral uses a **standard template** and will include your **electronic signature**.

To learn more, see the [Patient FAQ](#) and dedicated [Secure Send guide](#).

To securely send a pathology referral:

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) Optional: **Pin not required** (Zedmed v37 and later).

Overrides the one-time security code requirement - the code sent to the patient to open the portal and access the sent files.

e) 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.

## Maintain test groups

A **Group** is a set of tests for a specific condition, and doctors can create and maintain their own test groups.

To update the group tests:

1. Right-click in the **Groups** field and select **Group Maintenance**.

This will open the **Test Group Maintenance** screen.

- Select a group and select **Edit** to modify the tests in the group.

- Select a group and select **Delete** to remove that group.
2. To add a new group, select **Add New**.

The **Test Group** screen will open.

3. In the **Group Name** field, enter a name for the set of tests.
4. Use the left-pointing single-arrow icon to move the required tests from **All Tests** to **Included Tests**.
5. Select **Ok** to save and exit.

Use the **Outbox Viewer** to see your sent messages.

