

Summary Views Referrals

Last Modified on 13/01/2025 1:29 pm AEDT

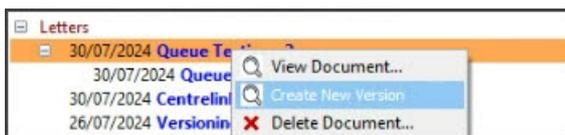
When you open a patient in clinical, Summary Views will appear on the lower left. You do not need to start an encounter. The Referrals Summary View shows referrals grouped into Pathology, Radiology and Letter.

The status of each referral is indicated as follows: **Red** icon= Open referral | **Green** icon = closed referral.

Edit a referral letter (versioning)

Versioning is a feature that the practice can enable to ensure a history of all changes to a referral or letter is retained. When versioning is enabled, a new referral or letter is created when a change is made. Requires **Zedmed v37 or later**.

To modify a CDA or Referral letter, right-click the letter and select **Create New Version**. An editable copy of the referral will open with a version suffix (v2, v3 ...).



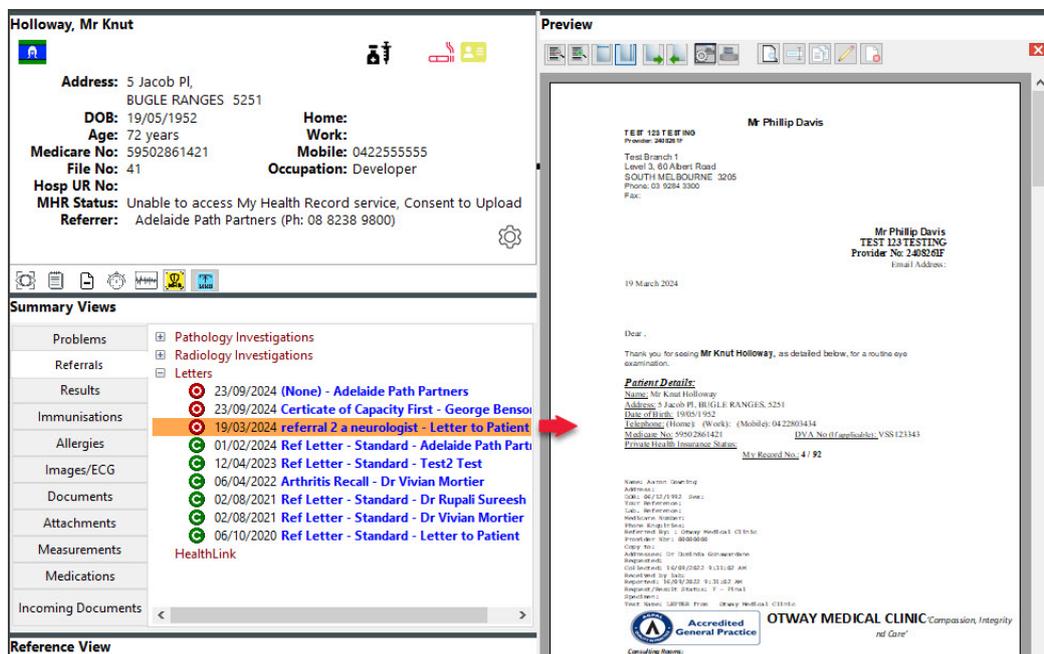
- Versioned referrals are displayed using a tree structure.
- With versioning enabled, a new referral/letter will be created with a v1 suffix by default.
- Delete Document can be given a time limit by the practice.
- A new document version can be created from any version of a document, it does not have to be the latest. So if you have v1, v2 and v3, you can create a new version of v2



Referral letter preview

When you click on a Referral Letter in Summary Views, a preview opens beside it. Use the Preview menu to zoom in and out, move to the next page and print. The zoom level will be retained for that session. Pathology and Radiology are not supported.

Preview



Document Preview is enabled by default. It can be disabled under **My Options > Enable Document Preview**.

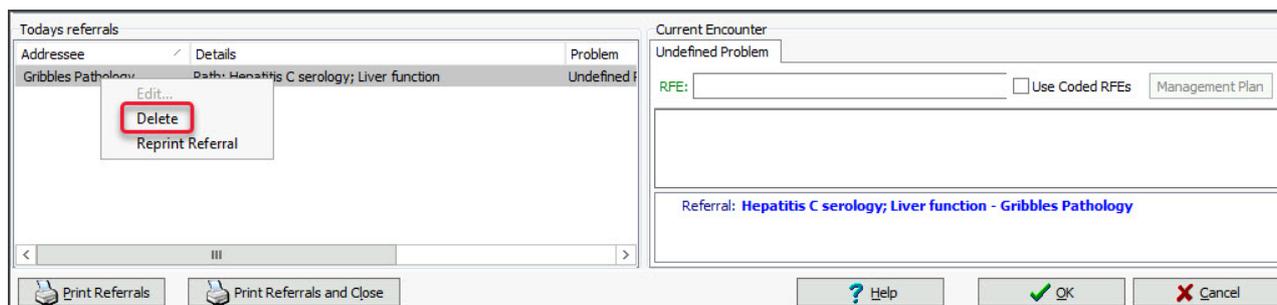
Attach a document

Right-click options

- Right-clicking a **Letter** gives you the options: **View, Edit, Delete, Change Referral Status** or **Reprint Referral Request**.
- Right-clicking a **Pathology** or **Radiology** referral gives you the options: **Change Referral Status** or **Reprint Referral Request**.

Deleting a Pathology or Radiology referral

You can delete pathology and radiology referrals within the Referrals module by opening the current encounter on the day of that encounter (up until midnight) then selecting right-click > **Delete**.



Reprint a referral

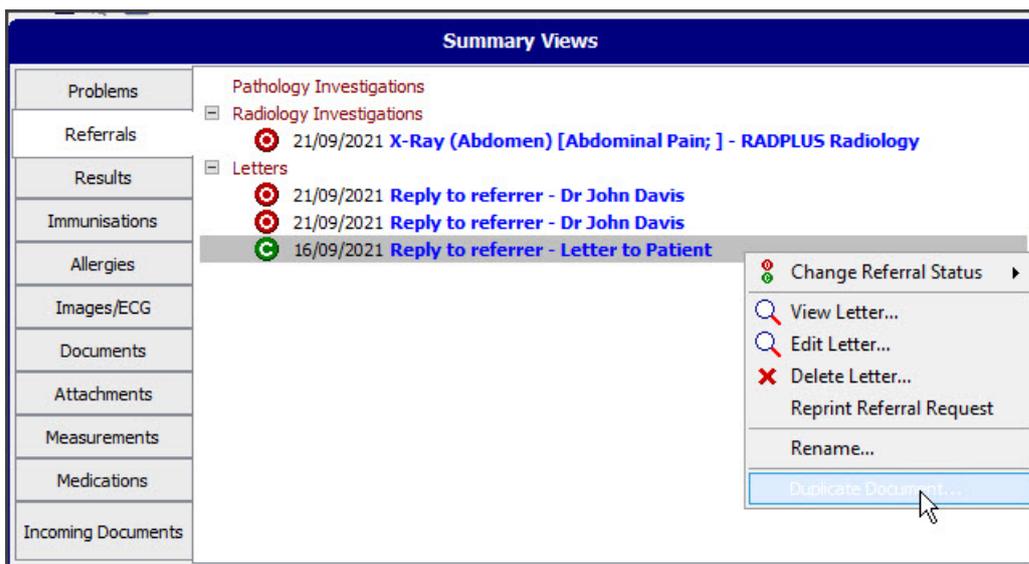
To reprint a referral:

1. Select the **Referrals** tab in Summary Views.
2. Check that the printer contains the correct paper.
3. Right-click the referral.
4. Select **Reprint Referral Request**.
5. Select the print options.

To send the referral electronically, select **Send electronically to all electronic recipients**.

To print the referral, the **Print Document** box must be selected.

6. Select **OK** to action your selections.



Outbox Viewer

The Results Outbox Viewer makes it easy to see all of your outgoing messages and review what has been sent, queued, received successfully, cancelled or failed. To learn more, see the [Outbox viewer guide](#).

Icon definitions

The Summary Views **Documents** and **Referrals** tabs contain saved and completed referrals, and actions can be performed based on the referral's status.

- **Blue text** means the document has not been uploaded to My Health Record
- **Black text** means the document has been uploaded to My Health Record

Icon	Meaning	Key <u>right-click</u> options
	Zedmed Open referral waiting for a response	Change Status Reprint Referral Request
	Zedmed Closed referral	Change Status Reprint Referral Request
	MHR Draft (saved) - still being worked on	Edit (Reopen) No Consent to upload
	MHR Processed - blue/black text = upload status	Remove from My Health Record Resend to Recipients



MHR | Approved (Complete) - to be manually sent

Send to My Health Record | Send to Recipients

The image displays two side-by-side screenshots of a medical software interface, likely a patient portal or clinician dashboard. Both screenshots show a 'Summary Views' section with a list of document categories on the left and a corresponding list of documents on the right.

Left Screenshot: The 'Documents' category is highlighted with a red box. The document list includes:

- 14/02/2023 Letter to Dr Brenda Reed
- 18/01/2023 Asthma plan
- 22/12/2022 Holloway, Mr Knut_4.rtf
- 24/11/2022 Ref Letter - Standard - Dr Brenda Reed
- 15/11/2022 Letter
- 15/11/2022 Patient report
- 11/11/2022 Full History
- 26/09/2022 Letter test
- 21/09/2022 Medical Certificate
- 15/08/2022 EPC Referral
- Referral Letters
 - 17/02/2023 eReferral - Mack Tester1 v1
 - 17/02/2023 eReferral - Mack Tester1 v1
 - 16/02/2023 eReferral - Mack Tester1 v1
 - 02/02/2023 Ref Letter - Standard - Dr Brenda Reed
 - 27/09/2022 Ref Letter - Standard - Letter to Patient
 - 25/07/2022 Ref Letter - Standard - Dr Vivian Mortier
- My Health Record Summaries
 - 16/02/2023 Event Summary v1
 - 20/01/2023 Shared Health Summary
 - 20/01/2023 Event Summary v1
 - 20/01/2023 Event Summary v1
 - 18/01/2023 Event Summary v1

Right Screenshot: The 'Referrals' category is highlighted with a red box. The document list includes:

- Pathology Investigations
 - 25/11/2022 Histopathology - Gribbles Pathology
 - 27/09/2022 Reticulocyte count - Gribbles Pathology
 - 09/08/2022 U&E - Gribbles Pathology
- Radiology Investigations
 - 09/08/2022 X-Ray (Chest) - RADPLUS Radiology
- Letters
 - 17/02/2023 eReferral - Mack Tester1 v1
 - 17/02/2023 eReferral - Mack Tester1 v1
 - 16/02/2023 eReferral - Mack Tester1 v1
 - 02/02/2023 Ref Letter - Standard - Dr Brenda Reed
 - 27/09/2022 Ref Letter - Standard - Letter to Patient
 - 25/07/2022 Ref Letter - Standard - Dr Vivian Mortier