

# Summary Views Referrals

Last Modified on 09/12/2024 9:24 am AEDT

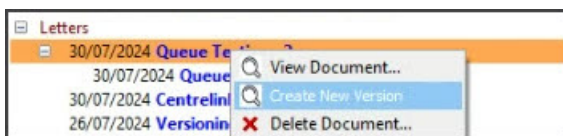
When you open a patient in clinical, Summary Views will appear on the lower left. You do not need to start an encounter. The Referrals Summary View shows referrals grouped into Pathology, Radiology and Letter.

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

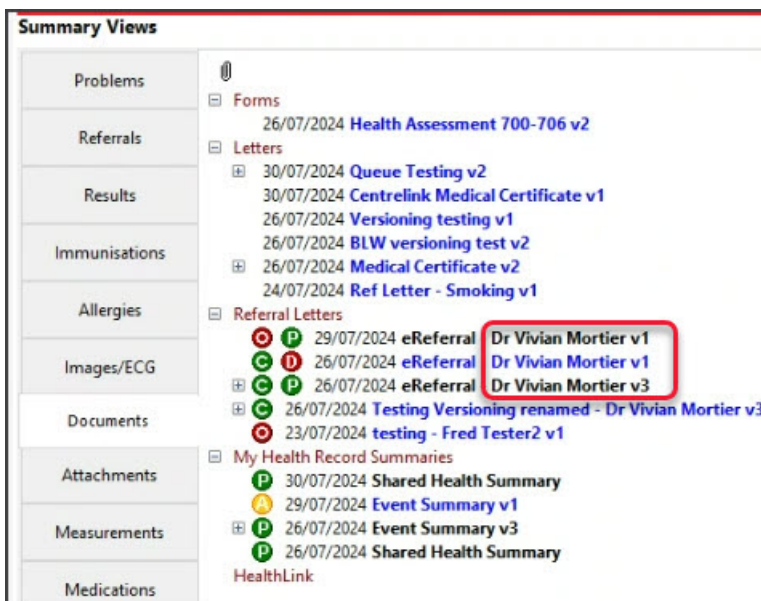
## Edit a referral letter (versioning)

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 ...).

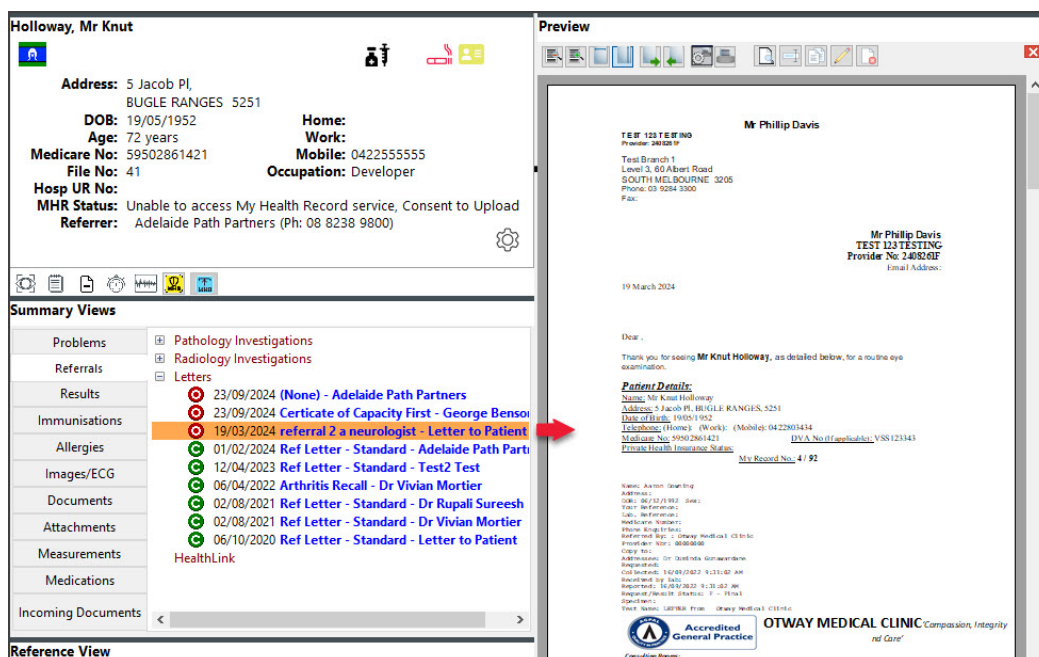


- Versioned referrals are displayed using a tree structure.
- With versioning enabled, a new referral/letter will be created with a v1 suffix by default.
- Delete Document can be given a time limit by the practice.
- A new document version can be created from any version of a document, it does not have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



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

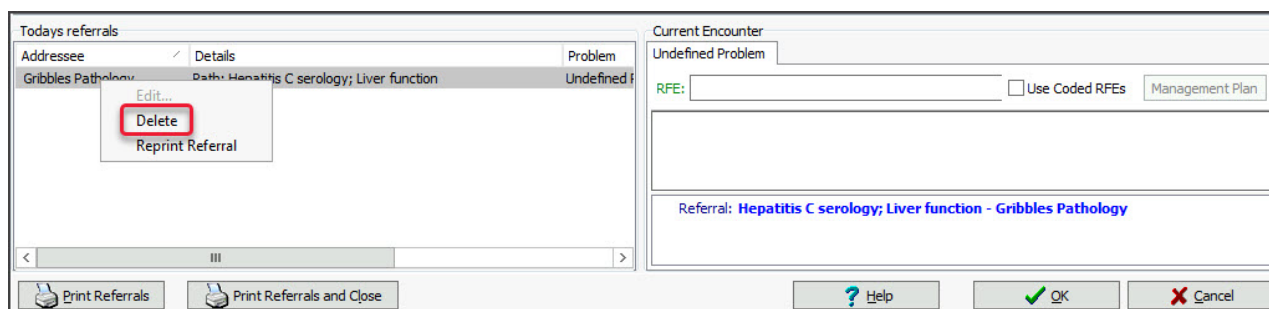
## Attach a document

### 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

### Summary Views

Problems	14/02/2023 Letter to Dr Brenda Reed 18/01/2023 Asthma plan
Referrals	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
Results	11/11/2022 Full History 26/09/2022 Letter test
Immunisations	21/09/2022 Medical Certificate 15/08/2022 EPC Referral
Allergies	Referral Letters 17/02/2023 eReferral - Mack Tester1 v1 17/02/2023 eReferral - Mack Tester1 v1 16/02/2023 eReferral - Mack Tester1 v1
Images/ECG	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
Documents	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
Attachments	
Measurements	
Medications	
Incoming Documents	

### Summary Views

Problems	Pathology Investigations 25/11/2022 Histopathology - Gribbles Pathology 27/09/2022 Reticulocyte count - Gribbles Pathology 09/08/2022 U&E - Gribbles Pathology
Referrals	Radiology Investigations 09/08/2022 X-Ray (Chest) - RADPLUS Radiology
Results	Letters 17/02/2023 eReferral - Mack Tester1 v1 17/02/2023 eReferral - Mack Tester1 v1 16/02/2023 eReferral - Mack Tester1 v1
Immunisations	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
Allergies	
Images/ECG	
Documents	
Attachments	
Measurements	
Medications	
Incoming Documents	