

Add or change a referral

Last Modified on 20/02/2025 9:28 am AEDT

Add referral details for a patient attending a specialist. This adds the referral information required for billing and for Medicare to approve refunds to the patient.

Adding referral information

The section explains how to add the referral details required for billing.

To add referral information:

1. Go to the **Reception** tab.
2. Select **Patients**.

This will open the **Patient Search** screen.

3. Locate the patient and open their record.

To learn more, see the [Find a patient's record article](#).

4. In the **Referrals** section, select **Add**.

The **New Referral Details** screen will open.

By default, the last doctor to provide the patient with a referral will be added.

If the referring doctor is different, go to the [Changing a referral doctor](#) section below.

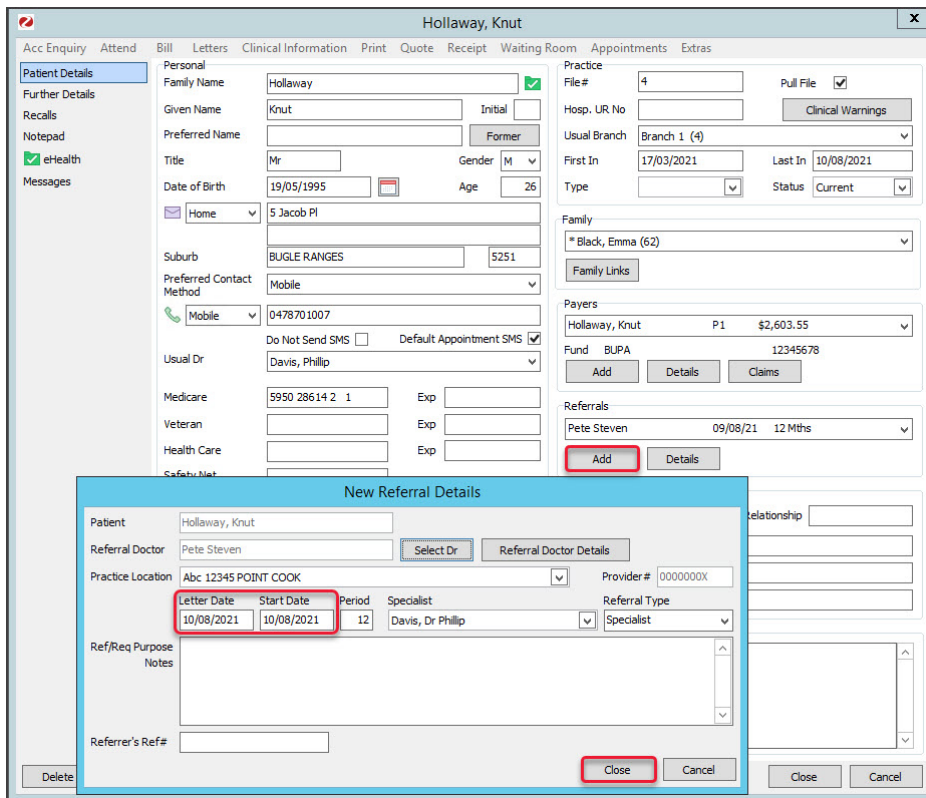
5. In the **Letter Date** field, enter the date the GP wrote the letter.
6. In the **Start Date** field, enter the date of the appointment with the specialist.
7. Check the **Period**. It should be 12 by default. This is the number of months within which Medicare will accept a referral for a claim. This 12-month period begins from the **Start Date**.
8. Check and update the **Specialist** field as required.

If the referral is to be shared between specialists within the practice or with a locum standing in, you can select **Doctor, Unknown** instead. This permits all doctors to show the referral on their invoices when billing.

9. Check the other fields are correct.

Adding **Notes** or an internal **Referrer's Ref#** is optional.

10. Select **Close** to save the changes and exit.



Uploading a referral

The referral should be uploaded to the patient's incoming documents.

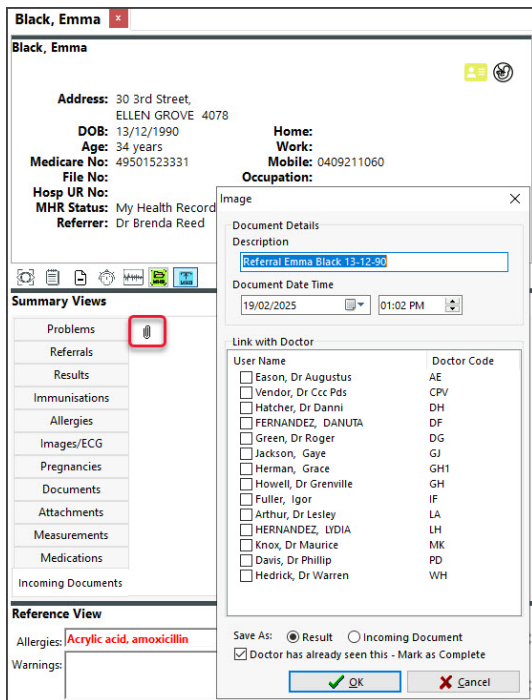
Note: In Zedmed v38 and later, **Incoming Documents** supports the following file types: jfif, pjpeg, jpeg, pjp, jpg, png, pdf

To add the referral to the patient:

1. Open the Patient's record in clinical
2. In **Summary Views**, select **Incoming Documents**
3. Select the paperclip icon.
4. Browse to locate and **Open** the referral.

The location is where the practice saves referrals that are scanned or received via email.

5. The **Image** options screen will open.
6. In the **Description**, type the naming convention used by the practice for referrals.



7. Select from the options based on your practice workflow:
 - a. **Link with Doctor** - if no doctor is selected, all doctors will see the referral if it is marked as incomplete and goes to the Results Inbox.
 - b. **Incoming Document** - recommended for referrals and documents.
 - c. **Mark as Complete** - if this is not ticked it will appear in the Results Inbox.

Results Inbox

Showing Records: (1 - 2 / 2) - Sorted By Result Description [Descending]

Result/Page: 100 Type: All

Patient	Assigned To	Result Reported Date	Result Collected Date	* Result Type	Result Description
Black, Emma	Davis, Dr Phillip (PDAVIS)	19/02/2025		Document	Referral Emma Black 13-12-90
Black, Emma	Administrator (Clinical)	26/07/2024		Result	FBC

8. Select **OK**.

The Referral will be saved.

Changing the referral doctor

This section explains how to change the referring doctor in the **New Referral Details** screen. You can follow all the steps in the Adding referral information section above and then complete these steps at the end before you select Close to save and exit.

1. Select **Select Dr.** on the **New Referral Details** screen.
 The **Find Referral Doctor** screen will open.

Hollaway, Knut

Acc Enquiry Attend Bill Letters Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details

Personal
 Family Name: Hollaway
 Given Name: Knut Initial:
 Preferred Name: Former
 Title: Mr Gender: M
 Date of Birth: 19/05/1995 Age: 26
 Home: 5 Jacob Pl
 Suburb: BUGLE RANGES 5251
 Preferred Contact Method: Mobile
 Mobile: 0478701007
 Usual Dr: Davis, Phillip
 Medicare: 5950 28614 2 1 Exp:
 Veteran: Exp:
 Health Care: Exp:
 Safety Net:
 Pen. Stat.: None
 ATSI: Not R

Practice
 File #: 4 Pull File:
 Hosp. UR No: Clinical Warnings:
 Usual Branch: Branch 1 (4)
 First In: 17/03/2021 Last In: 05/08/2021
 Type: Status: Current

Family
 * Black, Emma (62)
 Family Links:

Payers
 Hollaway, Knut P1 \$2,603.55
 Fund: BUPA 12345678
 Add Details Claims

Referrals
 Pete Steven 29/07/21 12 Mths
 Add Details

New Referral Details

Patient: Hollaway, Knut
 Referral Doctor: Pete Steven Referral Doctor Details
 Practice Location: Abc 12345 POINT COOK Provider #: 0000000X
 Letter Date: 09/08/2021 Start Date: 09/08/2021 Period: 12 Specialist: Davis, Dr Phillip Referral Type: Specialist
 Ref/Req Purpose:
 Notes:
 Referrer's Ref#:

Find Referral Doctor

Family Name:
 Given Name:
 Suburb:
 Provider Number:
 Group:
 Include Unavailable Doctors
 Cancel

2. Enter the selection criteria for the doctor, such as their surname.
3. Select **Find**.

The **Referral Doctor Selector** will open.

Referral Doctor Selector

	Family Name	Given Name	Work Address Line 1	Work Address Line 2	Work Address Line 3	Work Address Line 4
1	Sleep	A	123 Testing Street			
2	Star	Bree	123 Rd			
3	Steven	Pete	Abc 12345			

Branch 1 PDAVIS Press Enter or click on Referral to select this doctor

4. Select the doctor from the list.

The list contains all doctors in the practice database.

5. Select **Referral**.

This will take you back to the **New Referral Details** screen with the new doctor added. You can then complete the fields as documented above, and select **Close** to save and exit.

If the referring doctor is not in the list.

6. Select **Add New**.

This will open the New Referral Doctor Details screen.

7. Fill in the screen and select **Close** to save and exit.

This will take you back to the **New Referral Details** screen with the new doctor added. You can then complete the referral as documented above and select **Close** to save and exit.

New Referral Doctor Details

Identity

Family Name

Given Name

Salutation

Title Mobile

e-Mail

HPI-I

Available VIP/Favourite

Practice

Group

Description

Standard Referral Period (Months)

Home Address

Suburb

Home Phone

Practice Locations

Main Provider #

Organisation

Address

Suburb

Phone

Fax

HPI-O

Notes