

Add a Medical Referral (Referral In)

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To add a Medical Referral, follow these steps:

1. [Search](#) for a patient in need of a referral.
2. Click **Show**.
3. In the Main Menu, click **Referrals**.
 - a. Any existing referrals will be visible on the screen, check that the referral hasn't already been added, if it hasn't proceed to the next step
4. Click **Referral In**.
5. Select who the Referral is from (Practitioner) from the list (if the practitioner is not in the list then jump to the next section Why would a practitioner not be listed?)
 - a. Practitioners will only appear in the list if they have a valid provider number
 - b. **Note:** If you cannot see the practitioner in the list, try searching via their provider number.
6. Complete fields using the table below for reference.
7. Click **Create Referral**.

Field Name	Description	Examples
Details		
Referral From (Practitioner)	<p>The name of the referring practitioner the referral letter is from. This is taken from the professional contacts list in CareRight. The practitioner MUST have a provider number to appear in this list.</p> <p>The duration that the referral is valid will be based on the type of practitioner. See Notes field below for more information.</p>	<p>Dr Alan Jones</p> <p>Prof Debbie Davies</p>
Medical Provider	<p>Which provider the referral was sent to. If selected, when billing against this provider, the latest active referral to that provider will be selected.</p> <p>If this field is left blank, then this referral can be used by any medical provider.</p>	<p>Dr John Smith</p>
Referred On	Date that the referral was written/made	13/04/2015
Activated On	Date the referral was activated. The expiry date of the referral will be generated from this date. So, if the active date was 17/04/2015 and the referral was valid for 12 months, then the expiry date will be 16/04/2016.	17/04/2015

Field Name	Description	Examples
Notes	<p>This field is pre-populated with the duration of the referral (displayed as the number of months) and the provider number of the practitioner. The duration that the referral is valid will be based on the type of practitioner.</p> <ul style="list-style-type: none"> •GP Referral = 12 months •Specialist Referral = 3 months <p>You can manually override the length of the referral by:</p> <ul style="list-style-type: none"> •Typing a different duration e.g. "9 months [provider number]" •Typing "indefinite [provider number]" to create an indefinite referral. <p>Note: Behind the scenes, system requires a time period for an indefinite referral, configured under System Administration > Accounting Setup > Indefinite Referral Period(years).</p>	<p>(example provider number below)</p> <p>3 Months 2121331W</p> <p>12 Months 2121331W</p> <p>Indefinite 2121331W</p>
Disabled (checkbox)		
Referral Status	<p>This can be either active or inactive.</p> <p>This is automatically set to active when adding a referral.</p> <p>A process runs each night to make any expired referrals inactive.</p>	Active
Reference	This is a notes field.	
Services	Select from the drop-down list	
Correspondence		
Recipient Status	<p>Indicates whether this referring practitioner is the:</p> <ul style="list-style-type: none"> •Original Recipient (OR) •Carbon Copy (CC) •Blind Carbon Copy (BCC) •No Copy <p>For letter correspondence for this referral.</p>	Original Recipient

Medical Referrals

When you select "Referral In" to add a Medical Referral, the information will display in this summary. To view Referral information, select the Show button next to the relevant Referral.

Field Name	Description	Example
To	The associate/provider in your organisation that the referral was sent to This field is optional	Dr John Smith
From	The name of the referring practitioner	Dr Alan Jones Prof Mark Davies
Expires On	The date the referral expires. This is calculated based on the date that the referral is activated	16/04/2016
Activated On	The date the referral is activated on.	30/04/2016
Duration	This is the period the Referral is active for (displayed as the number of months).	12 Months
Recipient	Indicates whether this practitioner is the: •Original Recipient (OR) •Carbon Copy (CC) •Blind Carbon Copy (BCC) For letter correspondence.	Carbon Copy