

Recording a Referral

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Referrals

CareRight allows you to record a referral against a patient record. From the selected patient record select the Referrals menu item. This will display the Referrals screen. This screen will display any Medical Referrals or list Professional Contacts.

Medical Referrals							
To	From	Profession	Expires On	Activated On	Duration	Recipient	
Dr Ian JONAS	Dr Felicity Brown	General Practitioner	19/07/2019	20/07/2018	12 Months	Original	Show
	Daniel Ng	General Practitioner	03/07/2019	04/07/2018	12 Months	Carbon Copy	Show
	Elsa Liu	General Practitioner	03/07/2019	04/07/2018	12 Months	Carbon Copy	Show

Professional Contacts							
To	From	Profession	Activated On	Duration	Type	Recipient	
	Conrad Timon	General Practitioner		12 Months	Correspondence Only	CC	Show

From this screen you can:

- Add a Medical Referral (Referral In)
- Add a Local Medical Officer (LMO) Relationship
- Add a correspondence only relationship

Referral In	Referral Out	New Lmo	New Contact
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How to Add a Medical Referral

1. Search for the patient that the referral is for (Patients → Search → Show).
2. From the patient's record, 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.

3. Select **Referral In** button.
4. Select a Practitioner from the list (if the practitioner is not in the list then select the **New Contact** button to add them).
 - a. Note: Practitioners will only appear in the list if they have a valid provider number.
5. Select Medical Provider (who the referral is address to).
6. Fill in the relevant fields (Inc. Referred on, Activated on).
 - a. The **Notes** field will auto populate with the period of referral.
7. Fill in Correspondence status.
8. Select **Create Referral**.

Important Notes:

Professional Contacts are set up in CareRight via CareRight Dashboard → Professional Contacts → New. When setting up a Professional Contact it is important to remember that the Professional Category field i.e. GP, Neurologist will drive the period of the Referral i.e. 3 months / 12 months. Also, that the Professional Contact must have a Provider Number. If these values are not correctly setup then a Referral will not be classed as a Medical Referral.

How to Add Other Referrals

You can also record a relationship that a patient has with a professional contact that, or for an informal referral (non-medical). This could be the relationship between the patient and their GP, where their GP referred them to the specialist that you have received a medical referral from.

You can record two types of relationship here:

- A LMO relationship (Click New LMO)
 - Correspondence Only relationship (Click New Contact)
1. Search for the patient that the referral is for (Patients → Search → Show).
 2. From the patient's record, 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.
 3. Click **New LMO** or **New Contact**.

4. Select a Practitioner from the list.
 5. Fill in the relevant fields (Inc. Referred on, Activated on).
 6. Select **Create Referral**.
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