

## Referrals - Overview

Last Modified on 31/03/2025 11:08 am ACDT


Referrals are letters between medical professionals, handing over the care between parties. When dealing with [Referrals for Specialist Treatment](#), referral letters must [meet certain criteria](#) to be usable in medicare claiming.

CareRight supports both receiving referrals - by physical letter, scanned into the system, by secure messaging, or by [Online Enquiries and Expressions of Interest](#); and modelling your outgoing referrals.


This article focuses on management of referrals at an individual patient level. See [High Volume Referral Triage and Management](#) for practice wide recommendations.

## Viewing a Patient's Referrals

Up to 3 active referrals are indicated in the patient banner.



**Mr Brent MACKEE**


 My Health Record

Health and disabilityitemMailhogPricingSearch Google


Facility: ADL MRN: 000002 CRN: Referrer: Dr LESLEY ARTHUR (2022056987) Home: 42 Mill Pl, SANDY POINT VIC 3959  
Male, aged 37 years, born on December 01, 1987, last admitted to Adelaide Surgical Clinic


Dr LESLEY ARTHUR


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.



**Mr Caleb James Gray**

 ALERT

 ALLERGY

 NOTICE

Facility: Banksia Park Clinic File Number: 000135 CRN: XXX1234 Primary Provider: Dr William Bill Referrer: Dr Brenda Reed () Home: 224 Curdievale-Pt Campbell Rd, ST PETERS SA 5069 Fund: iTest Health Fund, 86753091  
Male, aged 43 years, born on July 27, 1976, last admitted to Clintel Clinic. Mobile Phone: this is a phone number

Interpreter RequiredAccountingICONPAY

CURRENTHISTORY

Referral InReferral OutNew LmoNew Contact

[Dashboard](#) / [Patients](#) / [Mr Caleb James Gray](#)

Medical Referrals

To	From	Expires On	Activated On	Duration	Recipient	
Dr Ratko p. NED	Dr Andrew Kellie General Practitioner	21/03/2020	22/03/2019	12 Months	No Copy	Show

Medical Referrals (Expired less than 6 months)

To	From	Expires On	Activated On	Duration	Recipient	
Dr Magus POLAN	Dr Vivian Mortier ENT Specialist	20/11/2019	21/08/2019	3 Months	No Copy	Show
Dr Magus POLAN	Dr Harry Cohen Urologist	25/10/2019	26/03/2019	7 Months Non Standard	No Copy	Show

### Referrals Out

To	From	Activated On	Recipient	
Dr Brenda Reed General Practitioner	Dr Magus POLAN	03/02/2020	Original	Show

### Referrals Out (Expired less than 6 months)

To	From	Activated On	Recipient	
Dr Two Clintel Cardiologist	Dr Ian JONAS	06/08/2019	Carbon Copy	Show

### Professional Contacts

To	From	Activated On	Type	Recipient	
Dr Magus POLAN	Dr Two Clintel Cardiologist		Correspondence Only	Carbon Copy	Show
Dr Magus POLAN	Dr One Clintel General Practitioner		Correspondence Only	Carbon Copy	Show
Dr Magus POLAN	Dr Emmet Who Physician		Correspondence Only	Carbon Copy	Show
Dr Juan KRILL	Dr Bob Jones Gynaecologist		Correspondence Only	Carbon Copy	Show
Dr Magus POLAN	Dr Sam Entwistle General Practitioner		Correspondence Only	Carbon Copy	Show

CareRight allows you to record a referral against a patient record. From this screen you can:

- Add a Medical Referral (by clicking Referral In) - required for certain types of billing
- Create an outbound Referral (by clicking Referral Out)
- Add a Local Medical Officer (LMO) Relationship (By clicking New LMO)
- Add a correspondence only relationship (by clicking New Contact)

The screen is split into the following sections:

- Medical Referrals
- Professional Contacts

#### Current Tab selected:

- **Displays Medical Referrals** These referrals are not disabled, are currently active, and/or have a future activation date; and,

- **Displays Medical Referrals that have expired within the last 6 months** These referrals are not disabled, are not active (i.e., past activation date), and have an expiry date less than 6 months old from the current date.

#### History Tab selected:

- **Displays Expired Medical Referrals** These are referrals that have expired, but are not yet disabled;
- **Displays Disabled Medical Referrals** These are referrals that have been disabled; and,
- **Displays Disabled Professional Contacts** These are professional contacts that have been disabled.

## Adding a Specialist/Medical Referral from a GP

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
<b>Details</b>		
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>

Field Name	Description	Examples
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
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"> <li>•GP Referral = 12 months</li> <li>•Specialist Referral = 3 months</li> </ul> <p>You can manually override the length of the referral by:</p> <ul style="list-style-type: none"> <li>•Typing a different duration e.g. "9 months [provider number]"</li> <li>•Typing "indefinite [provider number]" to create an indefinite referral.</li> </ul> <p><b>Note:</b> Behind the scenes, system requires a time period for an indefinite referral, configured under <b>System Administration &gt; Accounting Setup &gt; Indefinite Referral Period</b>(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	
<b>Correspondence</b>		

Field Name	Description	Examples
Recipient Status	<p>Indicates whether this referring practitioner is the:</p> <ul style="list-style-type: none"> <li>•Original Recipient (OR)</li> <li>•Carbon Copy (CC)</li> <li>•Blind Carbon Copy (BCC)</li> <li>•No Copy</li> </ul> <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	<p>The associate/provider in your organisation that the referral was sent to</p> <p>This field is optional</p>	Dr John Smith
From	The name of the referring practitioner	<p>Dr Alan Jones</p> <p>Prof Mark Davies</p>
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

Field Name	Description	Example
Recipient	<p>Indicates whether this practitioner is the:</p> <ul style="list-style-type: none"> <li>•Original Recipient (OR)</li> <li>•Carbon Copy (CC)</li> <li>•Blind Carbon Copy (BCC)</li> </ul> <p>For letter correspondence.</p>	Carbon Copy

## Adding a Referral from another party

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**).

To record a relationship, follow these steps:

1. Search for the patient that the referral is for (Patients → Search → Show).
2. From the patient's record, select **Referrals** from menu.
3. 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 **New LMO** or **New Contact**.
5. Select a Practitioner from the list.
6. Complete the fields using the table below for reference.
7. Click **Create Referral**.

Field Name	Description	Examples
Details		

Field Name	Description	Examples
Practitioner	The name of the professional contact that the referral/relationship is with. This is taken from the professional contacts list in CareRight. The practitioner does not need to have a provider number to appear in this list.	Dr Bob Jones
Medical Provider	The associate/provider in your organisation that the referral/relationship details were sent to	Dr John Smith
Referred On	Date that the referral was written/made or when the relationship commenced	13/04/2015
Notes	A notes field.	
Reference	This is a short reference field.	
<b>Correspondence</b>		
Recipient Status	<p>Indicates whether this practitioner is the:</p> <ul style="list-style-type: none"> <li>•Original Recipient (OR)</li> <li>•Carbon Copy (CC)</li> <li>•Blind Carbon Copy (BCC)</li> <li>•No copy</li> </ul> <p>For letter correspondence for this referral.</p>	Original Recipient

## Viewing an existing Referral

- Click **Show** on a referral row listing.
  - The details of the referral will appear.
- Note:** If the referral is non-standard, expired, or disabled, then a warning message will appear above the referral.

### Warning

Referral duration is non standard

Referral is expired

### Details

Referral In	<a href="#">Dr Brenda Reed [Bre]</a> [Bre] 2054781W 42 Fifth Avenue, FOOTSCRAY VIC 3011
Medical Provider	Dr Magus POLAN
Referred On	14/09/2016
Disabled	No
Activated On	01/01/2019
Notes	3 Months 2054781W
Expires On	31/03/2019
Reference	
Referral Status	Inactive
Type	Referral In

## Referral Durations

There are three types of referral durations:

- Standard
- Non-standard
- Indefinite

In order to determine if a referral duration is **Standard** or **Non Standard**, CareRight needs to know the Professional Category of the provider, and therefore if their standard referral is for 3-months (eg Medical Specialist) or for 12-months (eg General Practitioner). CareRight looks at the Referral Activated Date and the Referral Date To to get the duration and then compares that to the default for the relevant Professional Category to determine if the referral is **Standard** or **Non Standard**

An indefinite referral has no specific expiry date.



Medical Referrals						
To	From	Expires On	Activated On	Duration	Recipient	
Dr Magus POLAN	Dr Brenda Reed General Practitioner	19/09/2024	20/09/2019	Indefinite	Original	Show
Dr Juan KRILL	Dr Brenda Reed General Practitioner	19/10/2020	20/09/2019	13 Months Non Standard	Carbon Copy	Show
Dr Magus POLAN	Dr Brenda Reed General Practitioner	13/06/2020	14/06/2019	12 Months	Carbon Copy	Show
Dr Juan KRILL	Dr Felicity Brown General Practitioner	04/12/2019	05/12/2018	12 Months	Carbon Copy	Show
Dr Mary SMITH	Dr Heena D General Practitioner	08/10/2019	09/10/2018	12 Months	Carbon Copy	Show

Indefinite tag displays when selecting a referral for an invoice:

Referral	
Referral	Dr Brenda Reed (2054781W) Activated: 20/09/2019 Expires: 19/09/2024 Indefinite
Invoice Override Code	<div> <div>Dr Brenda Reed (2054781W) Activated: 20/09/2019 Expires: 19/09/2024 Indefinite</div> <div>Dr Brenda Reed (2054781W) Activated: 14/06/2019 Expires: 13/06/2020</div> </div>

## Modelling external Professional Contacts who should receive communications or participate in a patient's care

When you click "New LMO" or "New Contact" and add a relationship, the information will appear here. To view referral information, click the Show button.

Field Name	Description	Example
To	The associate/provider in your organisation that the relationship details were sent to	Dr John Smith
From	The name of the professional contact that the referral/relationship is with	Dr Alan Jones Prof Mark Davies
Profession	The professional contact category of the referring/related practitioner	GP
Recipient	<p>Indicates whether this practitioner is the:</p> <ul style="list-style-type: none"> <li>•Original Recipient (OR)</li> <li>•Carbon Copy (CC)</li> <li>•Blind Carbon Copy (BCC)</li> </ul> <p>For letter correspondence</p>	<p>OR</p> <p>CC</p> <p>BCC</p>

## Important Notes:

1. 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 set up then a Referral will not be classed as a Medical Referral.

2. If you are adding a referral to a patient's record and the referring practitioner is not present in the drop-down list, this could be for one of two reasons:

- They are not registered as a Professional Contact; and/or,
- They are listed as a professional contact and don't have a provider number.

It is important to ensure all professional contact records that represent a practitioner providing a medical referral have a valid provider number.

**Note:** If you cannot find the provider by searching using their name, try searching utilising their provider number - this will ensure that you don't create duplicate contacts. You can add a provider number to an existing professional contact by following the steps in [Add a Provider Number to a Professional Contact](#).

## Marking a Referral inactive

### Expiring Referrals

Each night a process runs that marks any referrals that have expired as inactive. No manual intervention is required to expire referrals. When raising an invoice for a Patient, any expired Referrals will display with the text in Red and highlighted for easier identification

i.e Dr Harry Smith Provider No. 12345675w Expired on: 24/09/2017

### Expiring Referrals Manually

1. [Search](#) for a patient.
2. Click **Show**.
3. In the Main Menu, click **Referrals**.
  - a. Any existing referrals will be visible on the screen.
  - b. Note: To disable an expired referral - access the referral under the **History** tab.
4. Select the **Show** button, next the Referral you wish to make inactive.
  - a. The referral details will display.
5. Click **Edit**.
6. Select the **Disabled** (check box - True/yes/checked).
7. Click **Update Referral**.

- a. A green successful message will display – Referral was successfully updated.
8. The Referral Status is Inactive, and the Recipient status is No Copy.

## Referring a patient to another service or provider (Referral Out)

Practitioners are able to raise a referral for external practitioners to your organisation (i.e., a Referral Out):

1. [Search](#) for a patient.
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 Out**.
5. Select **Referral To**.
 

Note: CareRight requires a provider number recorded against a medical provider to ensure correct referral out for this contact. For an informal referral (non-medical) or LMO referral - see Add a referral for LMO / informal referral (non-medical).
6. Complete fields using the table below for reference.
7. Click **Create Referral**.

Field Name	Description	Examples
<b>Details</b>		
Referral To (external Practitioner)	<p>The name of the practitioner the referral letter is going to . This is taken from the professional contacts list in CareRight.</p> <p>There must be a valid provider number recorded against this contact for a referral out.</p> <p>Current assumption in CareRight is that a Provider Number is <b>required</b> for a medical referral so the system is correctly preventing a referral out for this contact.</p>	<p>Dr Alan Jones</p> <p>Prof Debbie Davies</p>
Medical Provider	Which provider the referral is being raised by.	Dr John Smith
Referred On	Date that the referral was written/made	13/04/2015

Field Name	Description	Examples
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
Notes	<p>This field is pre-populated with the duration of the referral 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"> <li>•GP Referral = 12 months</li> <li>•Specialist Referral = 3 months</li> </ul> <p>You can manually override the length of the referral by:</p> <ul style="list-style-type: none"> <li>•Typing a different duration e.g. "9 months [provider number]"</li> <li>•Typing "indefinite [provider number]" to create an indefinite referral</li> </ul>	<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.	
<b>Correspondence</b>		
Recipient Status	<p>Indicates whether this referring practitioner is the:</p> <ul style="list-style-type: none"> <li>•Original Recipient (OR)</li> <li>•Carbon Copy (CC)</li> <li>•Blind Carbon Copy (BCC)</li> <li>•No Copy</li> </ul> <p>For letter correspondence for this referral.</p>	Original Recipient

Field Name	Description	Examples
Letter Delivery Method	Select from the drop-down list	
<b>Letter</b>		
Location	Select from the drop-down list	
Description		
Letter Writing Editor	This utilises the same Letter editing functions in Correspondence	
Notes		