

Creating / Updating Referrals / LMO / Correspondence Contacts

Last Modified on 21/08/2020 4:52 pm ACST

Creating a Medical Referral In

1. From the dashboard Click Patients
2. Search or scroll My patients list to find the patient then click patients name or show
3. Scroll down the sub menu and click referrals
 - 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 Click New Contact to add provider.
6. Complete the fields and click Create Referral.

The screenshot shows a web interface for creating a medical referral. At the top, there is a breadcrumb trail: [Dashboard](#) / [Patients](#) / [Mr Andrew Anderson](#). Below this is a section titled 'Details' containing several form fields: 'Referral From' is a dropdown menu showing 'Dr Felicity Brown 1234456T Bowen Hills Medical, 112 Bowen bridge Road, Bowen Hills QLD, 4006'; 'Medical Provider' is an empty dropdown menu; 'Referred On' and 'Activated On' are date pickers both set to '13/08/2020'; 'Notes' is a text area containing '12 Months 1234456T'; there is a checkbox for 'Disabled' which is currently unchecked; 'Referral Status' is a dropdown menu set to 'Active'; and 'Reference' is an empty text field. Below the 'Details' section is a 'Correspondence' section with a 'Recipient Status' dropdown menu set to 'Carbon Copy'. At the bottom of the form are two buttons: 'Create Referral' (in blue) and 'Cancel' (in grey).

Creating a Medical Referral Out

1. From the dashboard Click Patients
2. Search or scroll My patients list to find the patient then click patients name or show
3. Scroll down the sub menu and click referrals
4. 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
5. Click Referral Out

6. Select who the Referral is going to from the list
7. If the practitioner is not in the list then Click New Contact to add provider.
8. Complete the fields and click Create Referral.

Details

Referral To: Dr Felicity Brown 123456T Bowen Hills Medical, 112 Bowen bridge Road, Bowen Hills QLD, 4006

Medical Provider: *

Referred On: 13/08/2020

Activated On: 13/08/2020

Notes: 12 Months 123456T

☐ Disabled

Referral Status: Active

Reference:

Correspondence

Recipient Status: Carbon Copy

Letter Delivery Method: Print

Letter

Location: MS Consulting

Description: Referral Out Letter


Letter Text

Rich text editor toolbar with options: Edit, Insert, View, Format, Table, Bold, Italic, Underline, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and a link icon.

Add a LMO Referral / informal referral (non medical)

1. From the dashboard Click Patients
2. Search or scroll My patients list to find the patient then click patients name or show
3. Scroll down the sub menu and click referrals
4. 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
5. Click New Lmo
6. Select who the Referral is going to (Practitioner) from the list
7. If the practitioner is not in the list then Click New Contact to add provider.
8. Complete the fields and click Create Referral.

Details

Practitioner	Dr Joe Blow The Village Plaza, Shop 6, 1B 11 Bay Drive, , MEADOWBANK NSW 2114	✕	▼
Medical Provider			
Referred On	13/08/2020		
Notes			
Reference			

Correspondence

Recipient Status	Carbon Copy	▼
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Create Referral Cancel