

Referrals Functionality

28/04/2025 1:51 pm BST

Summary

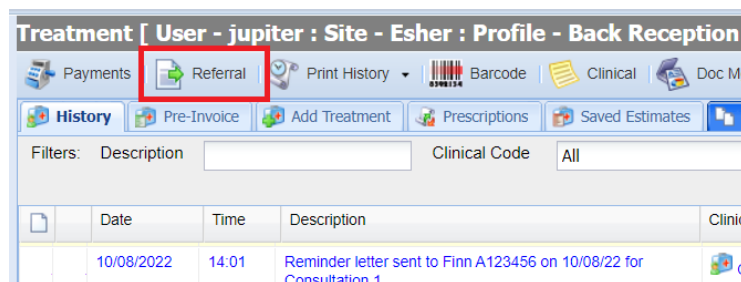
Selecting the 'Referral' button from the Treatment History Screen streamlines the user workflow for sending a referral. The step-by-step wizard can be used to attach treatment history and documents, register referral details and send an email with a populated referral document attached.

To enable this functionality, see: [Referral Settings](#)

Details

Sending a Referral



1. From the Treatment History screen, select the 'Referral' button.



2. The Wizard will display, select the Treatment History you wish to attach to the referral email and select Next.

A screenshot of a software interface titled 'Send Referral'. Below the title bar is a section titled 'Patient Referral History'. Below this section are several fields and checkboxes. The 'Start Date' field is labeled 'Start Date: *' and contains the date '23/05/2022'. The 'End Date' field is labeled 'End Date: *' and contains the date '22/10/2024'. Below these fields are four checkboxes: 'Show Prices', 'Show Clinical Notes', 'Show Clinical Notes Only', and 'Include Archive Data'. All checkboxes are currently unchecked.

3. Tick the documents attached to the Patient's treatment history you wish to attach to the referral email.

Name	Description	Print Email
VET_CONSENT_1266780_1653311694383_DOCUMENT.docx	Document Created - GA consent form.docx	
IMG_4999.JPG	Imported Document - doc	

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Export History >> **Document Management** >> Register Referral Practice >> Send Email

☐ Select all < Back Next Cancel

- Register the Site you are referring the Patient to by using the drop downs to select information already existing in the referral library. If the referral practice and other information isn't already within the libraries, you can use the 'Manage Practices' etc options to add these in.

Send Referral

Register Referral Practice

Details

Case No.

New

Referral Category *

▼

Manage Categories

Referral Practice *

▼

Manage Practices


Referral Vet *

▼

Manage Practitioners

Initial Date

22/10/2024



Referral Reason *

▼

Manage Reasons

Ext. Practice Reason *

▼

Manage Reasons

Referring Vet *

Lorraine McGowan

▼

Notes

Practice Details

Postcode

Tel

Fax

Email

Vet Details

Tel

Direct Email

- Send the Email to the referral practice.
- An audit of the communication is logged against the Client's record in the Communication tab.