

How to create a referral



If needing referrals applies to your discipline, read on to learn how to create new referring doctors on your FYDO system; and how to create referrals on patient records.

Start off by opening a patient's record. Below is an example of a patient record, with the referral section highlighted.

117 - BURDETTE, Pamela

Patient Details Other Appointments Recalls Accounts Episodes Communication


Patient Details

Patient #	117	File Num		External ID	117
Title	Mrs	Gender	Female		
First Name	Pamela			Mi	
Last Name	BURDETTE				
Pref. Name					
Address	1 Scotts st				
Suburb	KILLARA	State	NSW	Postcode	2071
Mailing Address					
Suburb		State		Postcode	
Date of Birth	01/01/1920		Age	100	DOB Estimate <input type="checkbox"/>
Mobile	0423-555-552	Home	() -	Work	() -
Email	pamela@gmail.com				

Medicare/DVA Details

Medicare Number	2111-11111-1	Ref	1	Exp	
Eligibility	Eligible - Australian Resident				
Veterans No.		Veteran Card Colour			
DVA Auth.No		DVA Auth. Date			
Entitlement Card				Exp	

Referring Details

Previous Referrals					
Referring Doctor					
Referral Date			Period		First Consult
Referral To					
<input type="checkbox"/> Site Referral (global)					



Notice that the data fields on the record are greyed out and you cannot commit any changes. This is because you are not in *edit mode* and therefore cannot make any edits.

So click on the **Edit** button to continue.

Edit

You will now be able to make edits to this record, scroll down to the **Referring Details** section.

If the referring doctor has never been entered into your FYDO system, click on the blue **ADD REFERRING DOCTOR** button to add a *NEW* referring doctor.

Referring Details	
Previous Referrals	<input type="text"/>
Referring Doctor	<input type="text" value="Search for a Referring Doctor"/>
	ADD REFERRING DOCTOR
Referral Date	<input type="text"/>  Period <input type="text"/> First Consult <input type="text"/> 
Referral To	<input type="text" value="Search for a Referral To"/>
	<input type="checkbox"/> Site Referral (global) <input checked="" type="checkbox"/> Active
	ADD ANOTHER REFERRAL EDIT REFERRAL

This will present you with the below screen, where the main data fields are highlighted. So go ahead and fill this in along with any other additional information you'd like to store about this referring doctor.

[SETTINGS](#) > [REFERRING DOCTORS](#) > [ADD REFERRING DOCTOR](#)

Referring Doctor Details	
Number	<input type="text"/>
Provider Number	<input type="text"/>
Type	<input type="text"/>
Title	<input type="text"/>
First Name	<input type="text"/>
Surname	<input type="text"/>
Practice Name	<input type="text"/>
Address	<input type="text"/>
Suburb	<input type="text"/>
Phone	<input type="text"/>
Fax	<input type="text"/>
Speciality	<input type="text"/>
Email	<input type="text"/>
Mobile	<input type="text" value="- -"/>
Created On	<input type="text" value="29/12/2020"/>
Birthdate	<input type="text"/>
Status	<input checked="" type="checkbox"/> Active

Miscellaneous Details	
External ID	<input type="text"/>
Location ID	<input type="text"/>
Comm Type	<input type="text"/>
Notes	<input type="text"/>

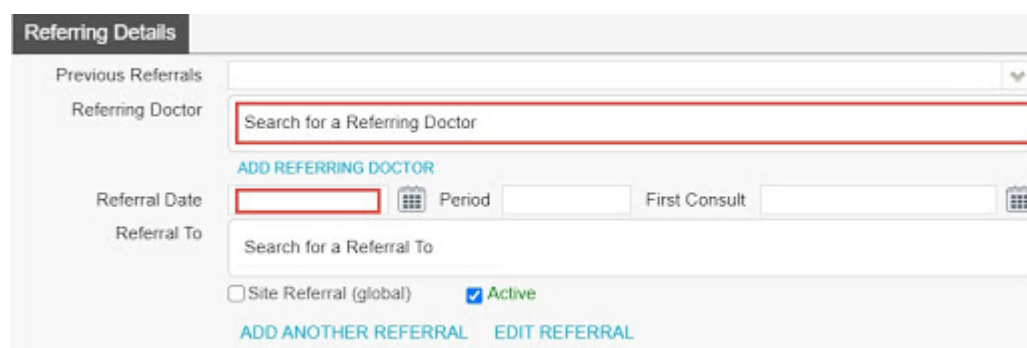
Note: this only needs to be done **once** per referring doctor.

Referring doctor 'Type'

- **GP:** by default, GP referrals have a referral period of 12 months
- **Specialist:** by default, Specialist referrals have a referral period of 3 months

If the referring doctor has already been entered into FYDO as a referrer, you will be able to search for them by clicking on the search box pictured below. You may search by the doctor's first or last name.

Next, enter the **Referral Date** and you're done! This is the minimum data set for adding a referral to a patient's record.



The screenshot shows the 'Referring Details' form. It includes a 'Previous Referrals' dropdown, a 'Referring Doctor' search box (highlighted with a red border), an 'ADD REFERRING DOCTOR' link, a 'Referral Date' field (highlighted with a red border) with a calendar icon, a 'Period' field, a 'First Consult' field with a calendar icon, a 'Referral To' search box, a 'Site Referral (global)' checkbox, an 'Active' checkbox (checked), and 'ADD ANOTHER REFERRAL' and 'EDIT REFERRAL' links.

Notes on other data fields in 'Referring Details'

- **Period:** this is how many months the referral is valid for. It may be overwritten by the user, at their discretion
- **First consult:** if the first *Date of Service* is after the *Referral Date*, you may enter the date of service into this field so that the *Referral Period* is calculated from this date, rather than the referral date
- **Referral to:** this is which provider the referral is for. If left blank, upon billing it will get linked to that provider;
- **Site Referral (global):** allows this referral to be used by any provider rather than one specific provider.

That's it! You've added a new referring doctor to your FYDO system and created a referral on a patient's record. Click on the green **Save** button on the top right corner of the patient record to save your changes.

Save