

Referrals Functionality

15/07/2025 2:12 pm BST

Summary

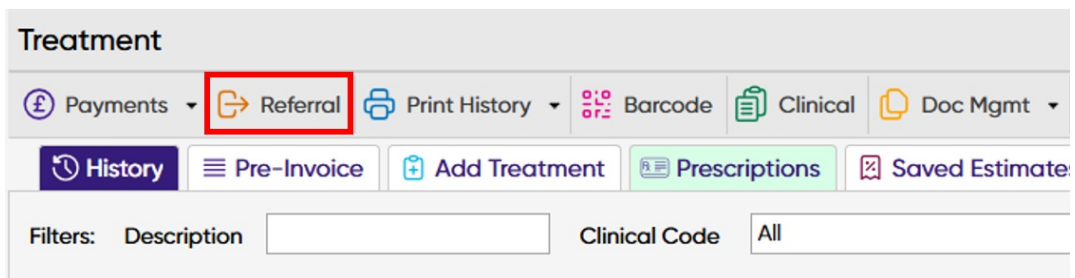
Selecting the 'Referral' button from the Treatment History Screen streamlines the user workflow for sending a referral. The step-by-step wizard can be used to attach treatment history and documents, register referral details and send an email with a populated referral document attached.

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

Details

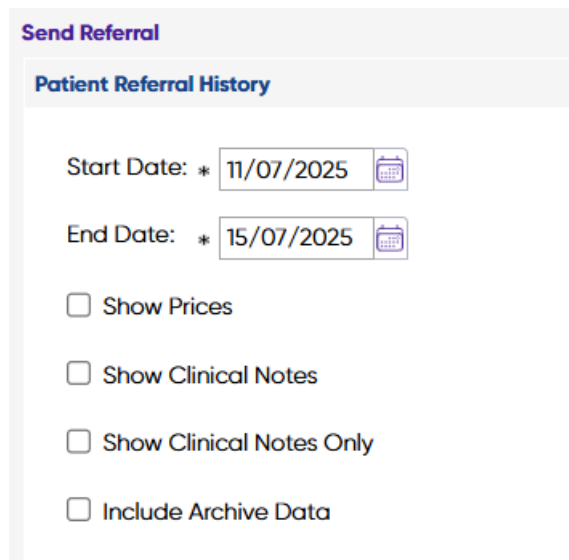
Sending a Referral

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



The screenshot shows the 'Treatment' header at the top. Below it is a navigation bar with several icons and labels: 'Payments' (with a dropdown arrow), 'Referral' (with a right-pointing arrow icon, highlighted by a red box), 'Print History' (with a printer icon and a dropdown arrow), 'Barcode' (with a barcode icon), 'Clinical' (with a clipboard icon), and 'Doc Mgmt' (with a folder icon and a dropdown arrow). Below the navigation bar is a row of buttons: 'History' (with a clock icon), 'Pre-Invoice' (with a list icon), 'Add Treatment' (with a plus icon), 'Prescriptions' (with a pill icon), and 'Saved Estimates' (with a document icon). At the bottom, there are two filter sections: 'Filters: Description' followed by a text input field, and 'Clinical Code' followed by a dropdown menu currently set to 'All'.

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



The screenshot shows the 'Send Referral' wizard. The title 'Send Referral' is at the top in a purple font. Below it is the section 'Patient Referral History'. There are two date pickers: 'Start Date: *' with the date '11/07/2025' and a calendar icon, and 'End Date: *' with the date '15/07/2025' and a calendar icon. Below the date pickers are four checkboxes with labels: '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.

Send Referral

Document Attachments

Name	Description	Print/Email
VET_CONSENT_1266592_1752580046861_DOCUMENT.docx	Document Created - GA consent form.docx	<input type="checkbox"/>

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Export History >> [Document Attachments](#) >> Register Referral Practice >> Send Email

☐ Select all < Back Next Cancel

1. 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 is not pre-existing within the libraries, you can use the 'Manage Practices' etc options to add these in.

Send Referral

Register Referral Practice

Details

Case No.

Referral Category *

Referral Practice *

Referral Vet *

Initial Date

Referral Reason *

Ext. Practice Reason *

Referring Vet *

Notes

Practice Details

Postcode

Tel

Fax

Email

Vet Details

Tel

Direct Email

2. Press 'Next'.
3. Send the email to the referral practice.
4. An audit of the communication is logged against the client's record in the Communication tab.