

Step 1:

In Admin->Defaults->Patients Page Defaults, you can set up a Professional Referral, Other Referral and/or Primary Care Provider

The screenshot shows the 'Patients Page Defaults' configuration screen. At the top is a navigation bar with icons for Patient, Billing, Tasks, Schedule, Inventory, Reports, Records, and Admin. Below this is a sidebar with menu items: Billing, Company, Computers, Credit Card, Defaults (highlighted), Diag Codes, E Claims, E Prescribe, and Email. The main content area is titled 'Default Values' and includes a 'Page:' dropdown set to 'Patients Page Defaults'. Below this are several tabs: Title, City, State, Marital Status (ignore [uses gov]), Occupation, Employer, Professional Referral (highlighted), Other Referral, Recall Type, Primary Doctor, Statements, News Letter, Apply Finance, Insurance Tabs, Photo Scanning, and Comments. Further down are tabs for Required Fields, Separate CL and SP Dates, Primary Care Provider (highlighted), Validate Addr Btn, and ZipCode. At the bottom, there are input fields for 'Value', '17a (UPIN)', and '17b (NPI)', with 'Professional Referral Doctor' entered in the 'Value' field.

Use the bottom buttons to add/remove/organize the doctors to your list

This screenshot shows a row of buttons used for managing the doctor list: 'Add Item', 'Remove', 'Up', 'Down', 'Set Default', 'Edit Item', 'Export List', 'Import List', and 'Alpha'.

Once you have a doctor on the list, you can double click their name to add in additional information

The screenshot displays two forms for adding doctor information. The top form, 'Office Information', has a 'Name' field containing 'Professional Referral Doctor' and a 'Group?' checkbox. It includes fields for Prefix, First, Middle, Last, and Suffix, with a 'parse' button. Below these are fields for Printed Name, Printed Name2, Secure Email (Direct), Phone, Fax, Category, Email, Address, Address 2, City, State, Zip Code, Web Address, and Notes. A 'Print Address Label' button is located at the bottom right of this form. The bottom form, 'Provider Information', includes a 'Name Box 17' field with a help icon and a note: '(if blank uses name from above. Some insurances require [last, first] for 99 codes)'. It also has fields for '17a (UPIN)' and '17b (NPI)', with a note: '(UPIN: The first 2 characters are the field identifier ex:1G12345)'.

Step 2:

In Patient->Additional Info you can designate one referral option along with the patient's PCP using the options you set up in Defaults. (You can also type the information in)

Referrals

☐ Patient Referral

☒ Professional Referral

☐ Other

Primary Care Provider

Professional Referral Doctor

PCP

Step 3: (optional)

You can create fields and a button to pull through the information from the patient page:

Referrals

Referral 1 (3068)

PCP 2 (3069)

Text Referrals

Type Button

Description

F9 Keys

Button Settings

Fields	Type	Action
3068	SD	-28
3069	SD	-176

Add Command Export Import Remove Command

-28 will pull through the referral you have selected (patient, professional or other), -176 will pull through the PCP in Patients

Referrals

☐ Patient Referral

☒ Professional Referral

☐ Other

Primary Care Provider

Professional Referral Doctor

PCP

Referrals

Referral Professional Referral Doctor

PCP PCP

Step 4: (optional)

Incorporating the referral information into the letter:

Wizard Patient Letters

Letter Name: Letter Name [Convert to RTF](#)

[Create New Letter](#) [Delete Letter](#)

Pattern	Value	
Referral	-28. Referral	Remove
PCP	-176. Primary Care Dc	Remove

[Add Field](#) [?](#)

*Do not use field ids for Medication or Allergy, use patient codes (-168 -> -171)

Referring doctor: <Referral>

PCP: <PCP>

If you would like the Name **and address (address will pull from Admin->Defaults->Patients Page Defaults you can use the value for -35 & -177:

The screenshot shows the 'Wizard Patient Letters' window. At the top, there's a dropdown menu set to 'Referral' and a 'Letter Name' field containing 'Referral'. Below these are 'Create New Letter' and 'Delete Letter' buttons. A table lists configured fields with 'Pattern' and 'Value' columns. The first two rows are 'Referral' (Value: -28. Referral) and 'Referral Add' (Value: -35. Pro Ref Address). The next two rows are 'PCP' (Value: -176. Primary Care Dc) and 'PCP Add' (Value: -177. Prim Ref Address). Each row has an 'Insert' button and a 'Remove' button. An 'Add Field' button with a help icon is on the right. A note at the bottom states: '*Do not use field ids for Medication or Allergy, use patient codes (-168 -> -171)'. The main text area shows the generated letter content: 'Referring doctor: <Referral>', 'PCP: <PCP>', 'Referring Doctor Name & Address: <Referral Add>', and 'PCP Name & Address: <PCP Add>'.

Pattern	Value
Referral	-28. Referral
Referral Add	-35. Pro Ref Address
PCP	-176. Primary Care Dc
PCP Add	-177. Prim Ref Address

*Do not use field ids for Medication or Allergy, use patient codes (-168 -> -171)

Referring doctor:
<Referral>

PCP:
<PCP>

Referring Doctor Name & Address:
<Referral Add>

PCP Name & Address:
<PCP Add>

Here is how each of the options look when you generate the letter:

The screenshot shows the 'Patient Letter' window. The 'Type Of Letter' dropdown is set to 'Referral'. There are buttons for 'Admin Wizard', 'Input Values', and 'Show'. The main text area displays the generated letter content: 'Referring doctor: Professional Referral Doctor', 'PCP: PCP', 'Referring Doctor Name & Address: Professional Referral Doctor, 123 Doctor Way, Austin, TX 78728', and 'PCP Name & Address:'.

Type Of Letter: Referral

Admin Wizard Input Values Show

Referring doctor:
Professional Referral Doctor

PCP:
PCP

Referring Doctor Name & Address:
Professional Referral Doctor
123 Doctor Way
Austin, TX 78728

PCP Name & Address:

Step 5: (Optional)

Incorporating the referral information into a Word document

After generating your Word template file (Admin->MS Word->Generate template file)

You can use the following merge word fields to pull through the information:

Referring Doctor:

«Referral»

PCP:

«Primary_Care_Doctor»

Referring Doctor Name & Address:

«Pro_Ref_Address»

PCP Name & Address:

«Prim_Ref_Address»|

Here is the end result:

Referring Doctor:

Professional Referral Doctor

PCP:

PCP

Referring Doctor Name & Address:

Professional Referral Doctor

123 Doctor Way

Austin, TX 78728

PCP Name & Address:

PCP

123 PCP Way

Austin, TX 78728