Step 1:

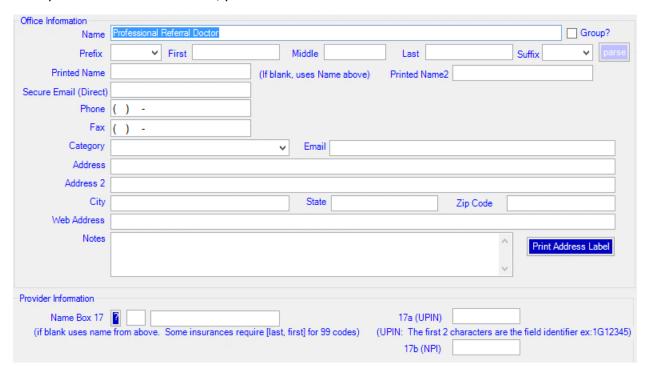
In Admin->Defaults->Patients Page Defaults, you can set up a Professional Referral, Other Referral and/or Primary Care Provider



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



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



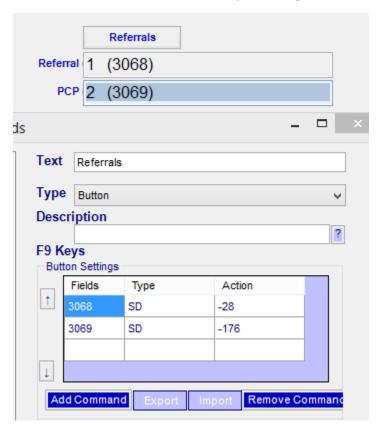
Step 2:

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)

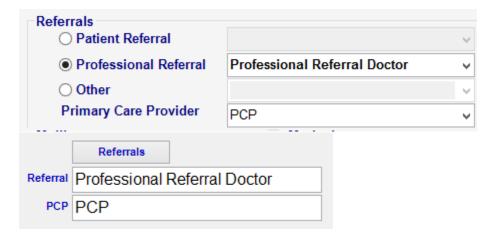


Step 3: (optional)

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

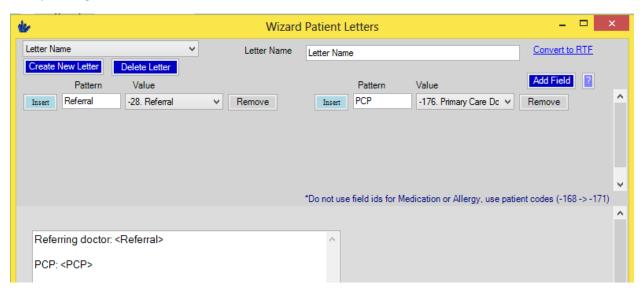


-28 will pull through the referral you have selected (patient, professional or other), -176 will pull through the PCP in Patients

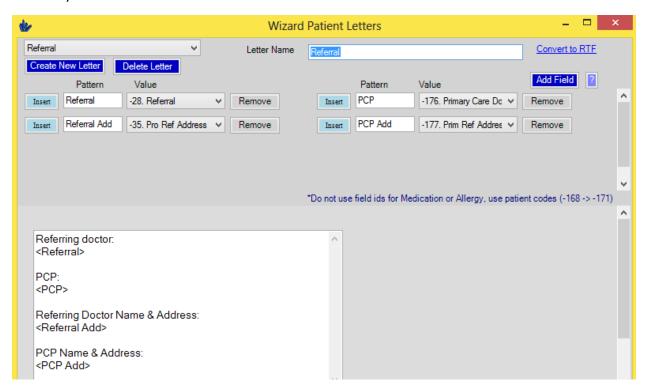


Step 4: (optional)

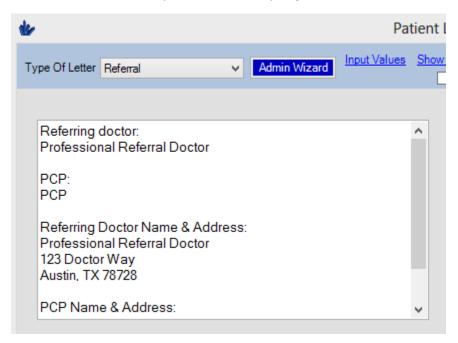
Incorporating the referral information into the letter:



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:



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



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
```