



# SENDING REFERRALS VIA PRIMARYCLINIC User Guide

# SENDING REFERRALS VIA PRIMARYCLINIC

1. Open the patient file, and select **New Letter**

The screenshot shows a patient file interface with a toolbar at the top. The 'Letters' tab is selected and highlighted in yellow. Below the toolbar, a table lists several letters. The 'New' button in the toolbar is highlighted with a red box.

Date	Sender	Addressee	Subject	Notation	Tags	SMD
17/09/2019	Alfred Soon		Medical Certificate			
17/09/2019	Alfred Soon	test org	Email Recall			
17/09/2019	Alfred Soon	Suresh, Arpitha	Email Recall		Delivered	
17/09/2019	Alfred Soon	Test Org.	Email Recall		Delivered	
17/09/2019	Alfred Soon		Medical Certificate			
24/08/2015	Alfred Soon		Email Reminder			

2. Click on the desired template, and click **OK**

The screenshot shows a 'Template' dialog box with a list of templates on the left and a preview of the selected 'Medical Certificate' template on the right. The 'Medical Certificate' template is highlighted in blue in the list. The preview shows a form with fields for Doctor Name, Doctor Qualifications, Doctor Address, and Doctor City, followed by a section for 'Medical Certificate' with a text area for the certificate content.

**Template**

- SUMMARIES
- SUPPLIED
- USER DEFINED
  - Email Recall
  - Email Reminder
  - Medical Certificate**

**Medical Certificate**

Doctor Name:  
Doctor Qualifications:  
Doctor Address:  
Doctor City: (Broken Paragraph)

**Medical Certificate**

THINK TO CERTIFY THAT

Patient Demographic: T4M (Patient Demographic: First Name) (Patient Demographic: Surname)

STARTING MEDICAL TREATMENT AND FOR THE PERIOD

From Date: To: (To Date) INCLUDE

Patient Demographic: WILHELMUS (Patient Demographic: USUAL GLEUPATER)

This Certificate was completed on: (Must be same Date)

Doctor Name:

Change Type/Name Delete Template View template OK Cancel

3. Click on the search magnifying tab to search for the recipient

Letter Details

Date: 17/09/2019

From: Alfred Soon

To:

CC:

Document type: Letter

Subject: Medical Certificate

Description:

Save

4. The following screen will appear

Search address book

Surname, first name: Speciality: All  Archived  Contain Find Print Advanced Search 4 Record(s)

ReferralNet recipients

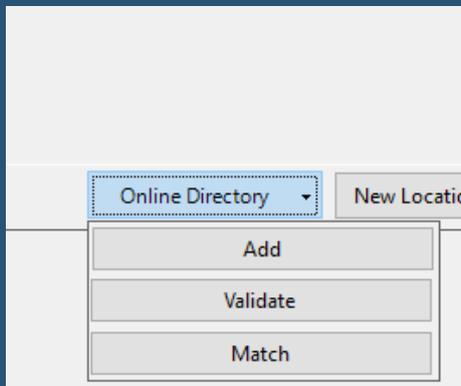
<input type="checkbox"/>	SurName	FirstName	FullName	Speciality	Mailing Address	Email	HomePhone	WorkPhone	Mobile	FAX	Network
<input checked="" type="checkbox"/>	Suresh	Arpitha	Arpitha Suresh	Support Staff	607 Bourke Street, Vic	arpitha.suresh@global-hc		0396750658			ReferralNet
<input type="checkbox"/>	Vivian	Mortier	Dr Mortier Vivian		...						
<input type="checkbox"/>	Brenda	Reed	Dr Reed Brenda		...						
<input type="checkbox"/>	Good Health Ra		Good Health Radiology	Radiology							

Online Directory New Location Save Layout Show Org To Excel Merge New Org New Person Edit Accept Cancel

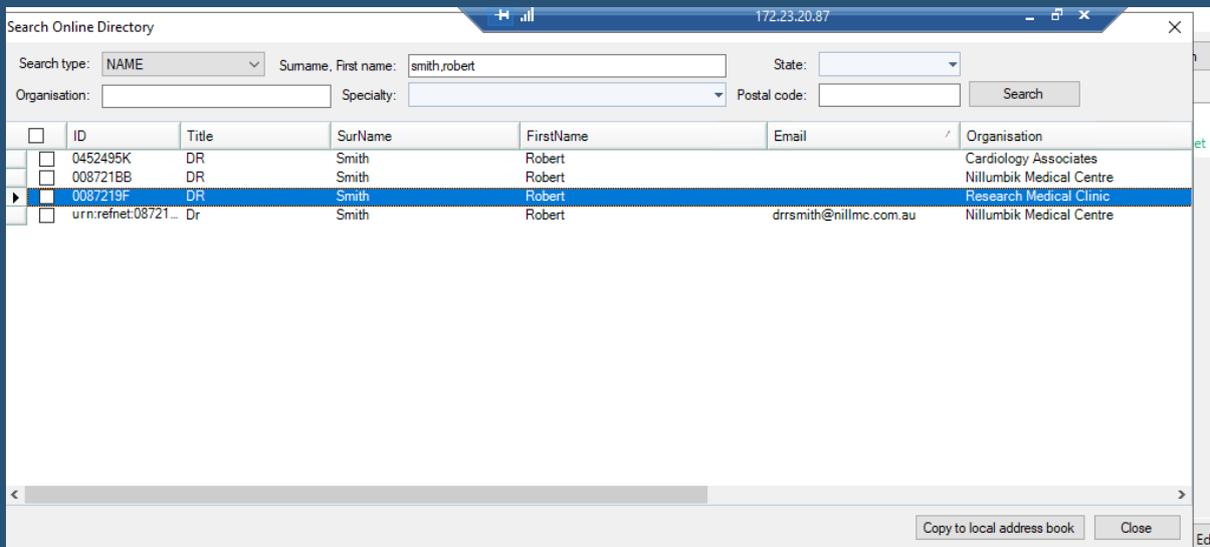
This Certificate was completed on 17 September 2019

Alfred Soon

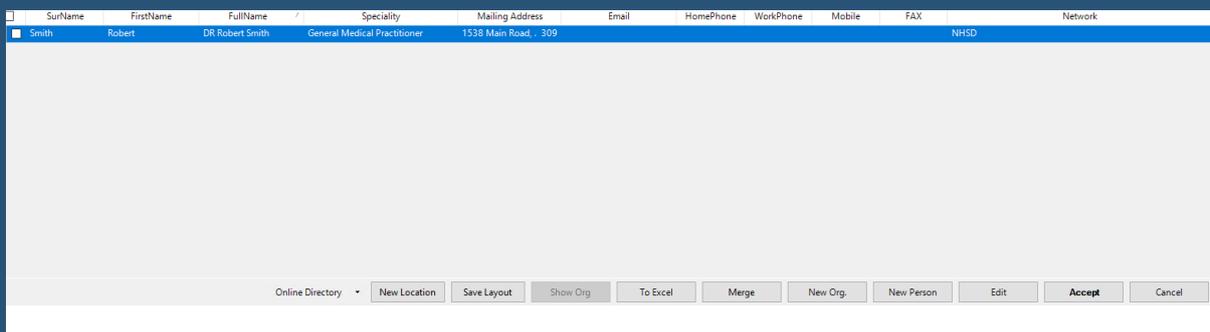
5. Select the dropdown for **Online Directory**, and click **Add**



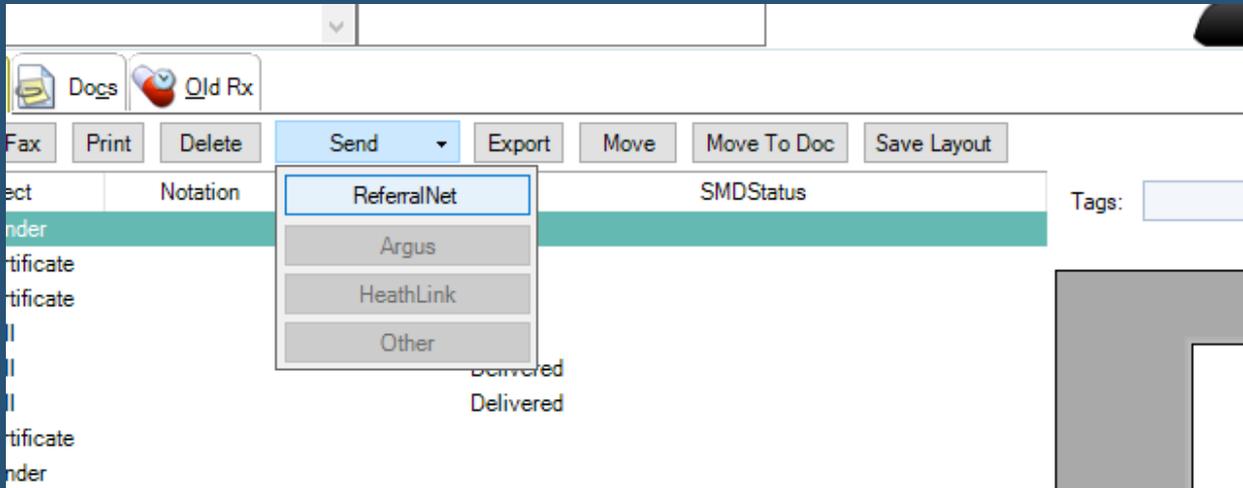
6. You can now search via **Online Directory**, which pops up with ReferralNet and Argus users. Select the recipient, or copy to the **local address book** if the recipient isn't already saved



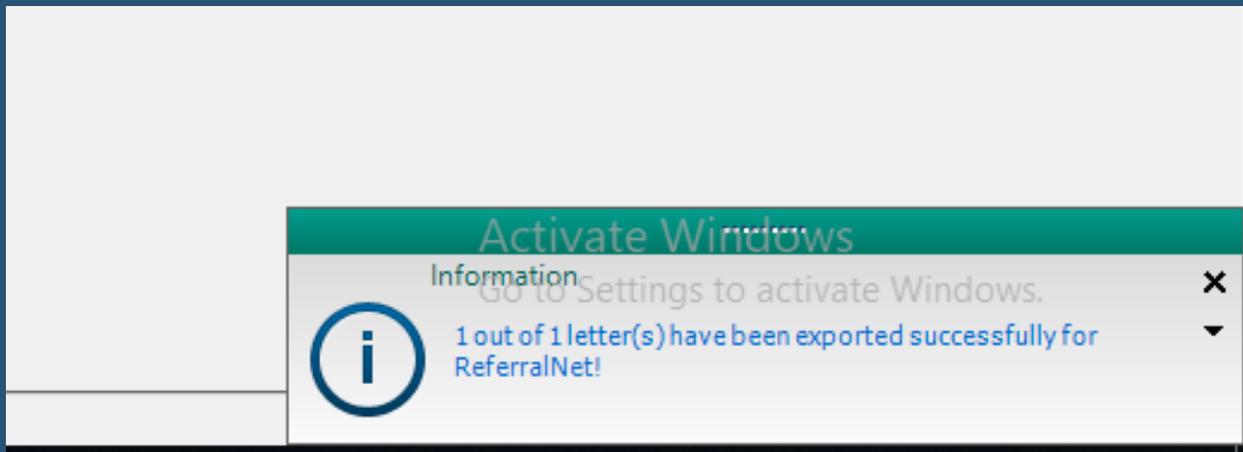
7. You can now accept and close the referral which will be saved in **Patient Profile**



8. Select **Send**, and click on **ReferralNet** as displayed below



9. This notification will appear if the referral/message has been successfully sent



10. If the recipient could not receive /retrieve your message, an email notification will be sent