

Referral Settings

24/10/2024 12:28 pm BST

Summary

Referral Settings can be accessed via: Administration > Settings and selecting the 'Referral' category.

This page documents each setting.

Details



The screenshot shows the 'Configuration Settings' window for the 'Referral' category. The window title is 'Configuration Settings [User - jupiter : Site - Esher : Profile - Back Reception1]'. On the left, a 'Categories' sidebar lists various settings, with 'Referral' highlighted in a red box. The main area shows the 'Referral' settings for the 'Esher' site. A 'Save' button is visible at the top right. The 'Add Treatment' section contains two radio buttons: 'Do not Show Referral Practice on Save' (selected) and 'Show Referral Practice on Save'. Below this, a checkbox 'Allow Editing of Referral/First Opinion details in Referral/First Opinion panels' is checked. At the bottom, a dropdown menu for 'Referral Template(Main Site):' is set to 'Referral email.docx'.

Add Treatment

Show Referral Practice on Save = Prompts user to select a referral practice when saving treatment onto the Patient's record.

Do not Show Referral Practice on Save = No action, do not display prompt.

Allow Editing of Referral/First Opinion details in Referral/First Opinion panels

Enabled = Users are able to maintain Referral details through the Patient Details > Referrals screen (rather than modifying through the libraries screen).

Disabled = Users can maintain Referral details through libraries only.

Referral Template (Main Site)

If a Client Document is specified here, this template is attached to an email by default when using the [Referral Wizard](#).

Note: This is a global system parameter (not site specific).
