Sending a Referral (Web)
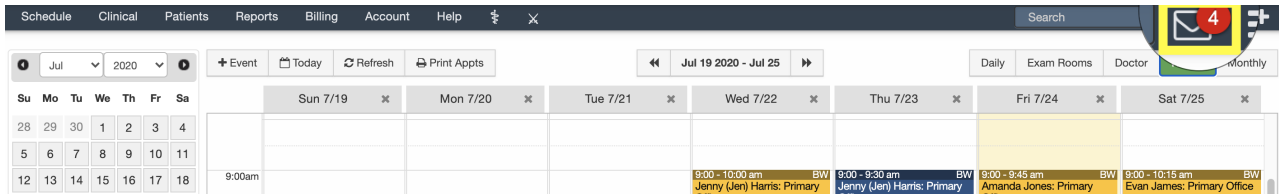
DrChrono offers you a quick and easy way to send patient referrals to other doctors. Follow the steps below to get started on sending out a referral.
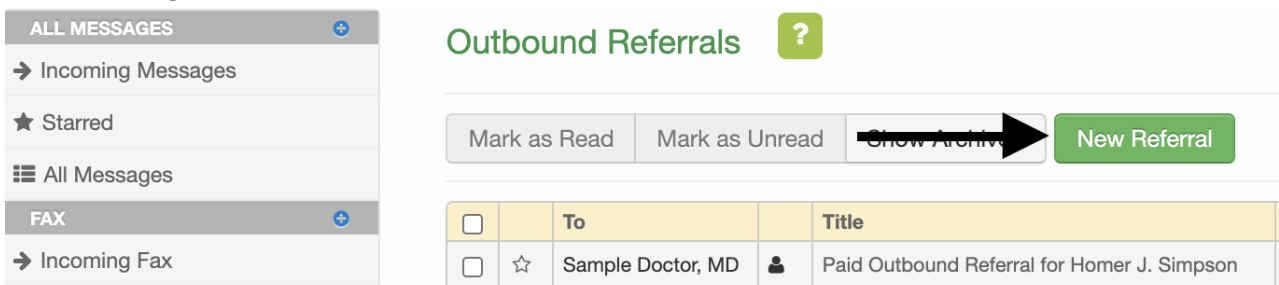
1. Go to your Message center by clicking the envelope button on the far right corner.
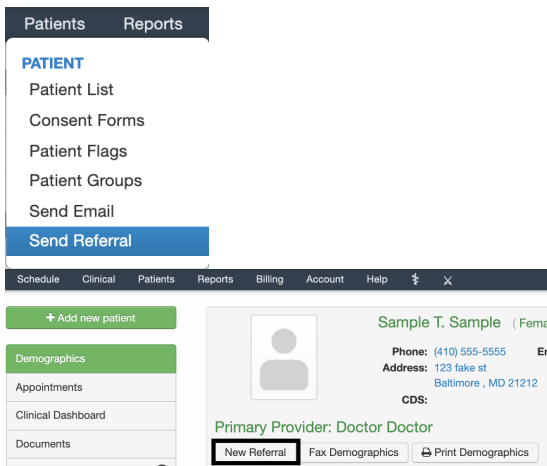

2. This will bring you to your messages center menu. On the left side of the screen, there is a menu with several different options. Go to **Outbound Referrals** in this menu.
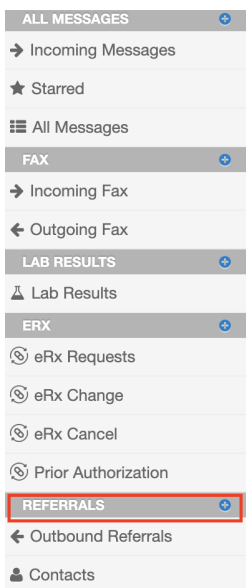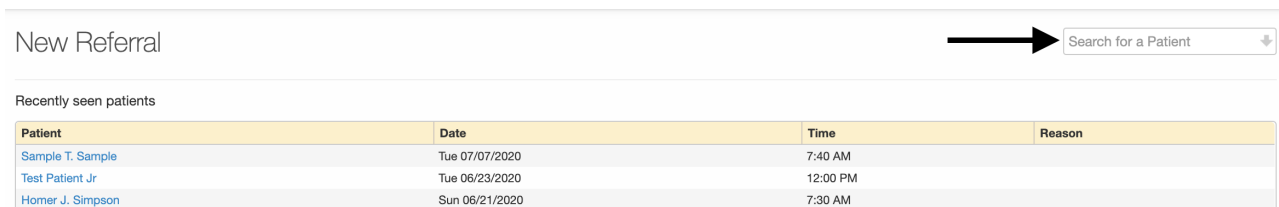

3. Click on the green **New Referral** button.

Note: You can also send a referral by going to **Patients** > **Send Referral** or by going to the patient's chart and selecting **New Referral.**

4. This will bring you to a list of your recently seen patients. You can select a patient from this list or search for the desired patient in the search bar located in the upper right corner.

New Referral

Search for a Patient

Recently seen patients

Patient	Date	Time	Reason
Sample T. Sample	Tue 07/07/2020	7:40 AM	
Test Patient Jr	Tue 06/23/2020	12:00 PM	
Homer J. Simpson	Sun 06/21/2020	7:30 AM	

5. Once you select the patient you wish to make a referral for, you will be taken to a page to fill out the referral information. Fill out the **To:** section with the information of who you are sending the referral to. If you already have the contact in your DrChrono account, you can select them from the dropdown. If the contact is not in your account, you will be prompted to create a new one.

Next, if needed, fill out the **Instructions**, **Reason for Referral**, and any relevant **Codes**.

New Referral for Sample T. Sample [SASA000001]

From: Doctor Doctor		To: Sample Doctor, MD
Email	drchrono@drchrono.com	Email
Phone	443-555-5555	Phone
Fax	+1 (301) 850-2018	Fax +1 301-850-2018
		Direct Email Address

☐ Include Header ⓘ

Instructions

[A Normal text ▾] [Bold] [Italic] [Underline] [x₂] [x²] ...

Reason for referral [_____]

ICD-9 Codes   Find Diagnosis codes
| # | Code | Description |

ICD-10 Codes   Find Diagnosis codes
| # | Code | Description |

CPT Codes   Find CPT Procedure codes
| Code | Description | Price |

HCPCS Codes   Find HCPCS Procedure codes
| Code | Description | Price |

6. The referral summary will be included by default. You can choose to exclude it, or certain sections of it with the referral by unchecking the boxes.

Referral Summary

☑ Include Referral Summary ℹ

☑	**Data To Include in Referral Summary**
☑	Patient name:
☑	Sex: Female
☑	Birthdate: Aug. 23, 1977
☑	Race: None known
☑	Ethnicity: None known
☑	Preferred language: None known
☑	Smoking status: None known
☑	Problems: View ▾
☑	Medications: View ▾
☑	Allergies: No Known Drug Allergies (NKDA)

7. You can select any **Lab Orders**, **Locked Clinical Notes**, and **Uploaded Documents** to include in the referral.

Lab Orders

Lab Order	Date	

Clinical Notes

Date of Service	Reason	Locked By	
07/07/2020		Not locked	Preview & Lock
01/08/2020		Not locked	Preview & Lock
07/12/2019		Not locked	Preview & Lock
07/09/2019	New visit	Doctor Doctor	✔ Note included
07/09/2019	New visit	Not locked	Preview & Lock
07/02/2019	New visit	Not locked	Preview & Lock
06/25/2019	New visit	Not locked	Preview & Lock
06/25/2019	Vein Problems	Not locked	Preview & Lock
06/20/2019		Not locked	Preview & Lock
06/19/2019	New visit	Doctor Doctor	✔ Include Note

Documents ℹ

Description	Date	Tags	
labs	June 25, 2019	fax, labs	✔ Document included
Medical and Financial Consent.pdf	June 24, 2019	labs	✔ Include Document

8. Once you have all of the information and documentation for your referral, you have the option to **sign your referral**. You can save your signature for future referrals by checking the box next to **Save Signature**.

You can click **Preview** to see the referral. You can also download and print it after clicking **Preview**.

You can send the referral by clicking the **Fax** button.

Sign your referral (Optional)

☑ Save Signature ⓘ

Preview

Fax ▾

9. Once the referral has been sent, you can see it under the **Outbound Referrals** section from step 2.

Sending Referral ✕

We're sending your referral. When complete, it can be viewed in the Outbound Referrals section of your mailbox

Close

(Video Tutorial) Sending Referrals