# Adding a Referral and Managing Referral Source Permissions

07/24/2024 12:14 pm EDT

Getting Started with a New Referral

If you get a referral from another provider, you can add that patient to your account and include the referral information in their chart.

To add a new patient, go to **Patients** and select **Patient List**. If the patient is already in your account search for their chart.
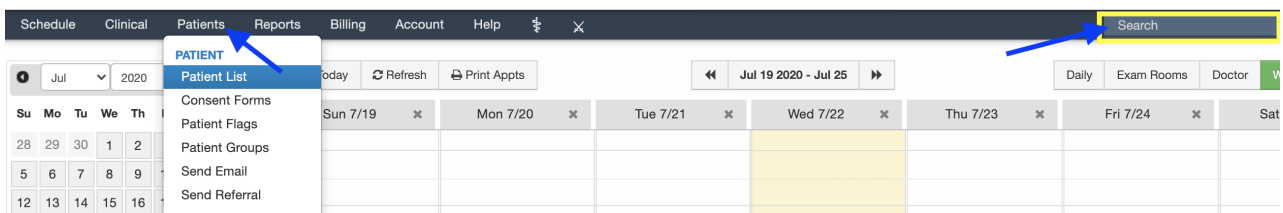
To add a new patient, click the green **+Add New Patient** button.

You'll be presented with the **New Patient** entry form for a new referral or the Patient Profile for an existing patient update. Navigate to the **Demographics** tab on either the New Patient or Patient Profile page.

To enter your referral information, scroll down to the **Referring Doctor** section of the form.

Referring Doctor

Referring Doctor Search		Will populate fields below
Referring Dr. First Name		
Referring Dr. Middle Name		
Referring Dr. Last Name		
Referring Dr. Suffix		
Referring Dr. NPI Number		
Referring Dr. Provider Number		
Referring Dr. Specialty		
Referring Dr. Address		
Referring Dr. Email		
Referring Dr. Phone	XXX-XXX-XXXX	
Referring Dr. Fax	XXX-XXX-XXXX	
Referring Source		
Primary Care Physician		
Referral Number		

Here you can enter all the referral information you have for the patient. The fields are as follows:

- Referring Doctor Search: If you have the referring provider in your contact list, you can search for the provider here and pre-populate most fields in this section. If not, you can select to create a new contact for the provider you have entered in this form and the contact will be saved upon hitting the **Save** button at the end of the page.
- Referring Doctor First Name: Provider first name
- Referring Doctor Middle Name: Provider middle name
- Referring Doctor Last Name: Provider last name
- Referring Doctor Suffix: Suffix of the provider (ie. Jr., Sr., II, III)
- Referring Doctor NPI Number: The provider's personal NPI. A National Provider Identifier or NPI is a unique 10-digit identification number issued to healthcare providers in the United States by the Centers for Medicare and Medicaid Services.
- Referring Doctor Provider Number: The provider's group NPI. A provider number uniquely identifies the medical practitioner and the location from which a service is rendered.
- Referring Doctor Specialty: The provider specialty.
- Referring Doctor Address: The provider address.
- Referring Doctor Email: The provider e-mail.
- Referring Doctor Phone: The provider's phone number.
- Referring Doctor Fax: The provider fax, for contact purposes.
- Referring Source: The source of the reference, typically an organization or individual. To add a new source, type in the new source name and then select the new source on the drop-down menu. If this drop-down menu does not appear, your account does not have sufficient permissions to add new sources.
- Primary Care Physician: PCP of the patient.
- Referral Number: A referral will have a number that is used in medical billing. This will affect if the patient's claims will be accepted by insurers.
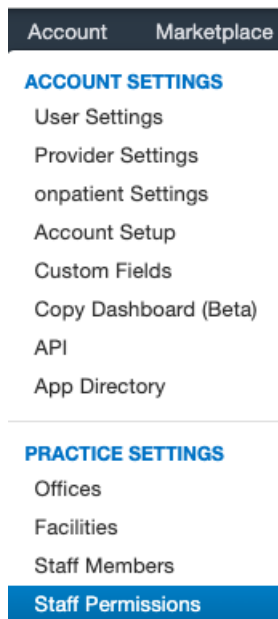
After completing these fields, click the **Save Demographics** button at the bottom of the screen.

Referral Source Permissions

If a staff member does not have permission to create new referral sources or a staff member needs to be restricted

from creating new referral sources, you can change those settings on the Permissions Administration page.

To access the Permissions Administration Page, from the navigation bar mouse over **Account** and select **Staff Permissions**.

From here you can view the permissions for your providers and staff. To change permissions for a provider or a staff member, select **View** next to the name of any person.

Scroll down to the Add new referring sources checkbox. Select **Edit Permissions**, and check or uncheck the box next to **Add new referring sources** to enable or disable the permission.

If the **Add new referring sources** option is checked, the staff member or provider will be able to add new referring sources to the saved list of referring sources. If this option is unchecked, the staff member or provider will only be able to add referrals from the existing list of referring sources.

Click **Save Permissions** when finished.

Permissions for Sample Staff ✕

Share Patients ℹ	☐
Access Reports ℹ	☑
Settings ℹ	☑
Export Patients ℹ	☑
Manage Permissions ℹ	☑
Manage Templates ℹ	☑
Manage Accounts ℹ	☑
Show Patient Balance ℹ	☑
Show Billing Tab ℹ	☑
Show Billing Summary ℹ	☑
Add new referring sources ℹ	☐
Access Institutional Billing ℹ	☐

[Close] → **Edit Permissions**

Permissions for Sample Staff ✕

Share Patients ℹ	☐
Access Reports ℹ	☑
Settings ℹ	☑
Export Patients ℹ	☑
Manage Permissions ℹ	☑
Manage Templates ℹ	☑
Manage Accounts ℹ	☑
Show Patient Balance ℹ	☑
Show Billing Tab ℹ	☑
Show Billing Summary ℹ	☑
Add new referring sources ℹ	☑
Access Institutional Billing ℹ	☐

[Close] → **Save Permissions**