## Adding a Referring Provider to a Patient Chart

07/24/2024 12:14 pm EDT

Adding a referring provider to a patient chart is easy to do in DrChrono and only takes a few steps.

1. Navigate to a patient's chart by going to **Patients > Patient List** and selecting the chart or searching for the patient.

So	chec	dule		Clin	ical	Patients Reports	Billin	g Accour	nt Help <sup>r</sup>	\$ X							S S	earch		
						PATIENT									-					_
0		Jul	~	2	020	Patient List	oday	2 Refresh	🖨 Print Appts				Jul 19 2020 - Jul 25	**			Daily E	kam Rooms	Doct	or V
<b>S</b>	м		Tu N	Ne	Th I	Consent Forms	Sun 7/	′19 ×	Mon 7/20	×	Tue 7/21	×	Wed 7/22	×	Thu 7/23	×	Evi	7/24	c	Sat
Su	IVI	0 1	iu v	we		Patient Flags	Sun //	19 %	WON 7720	~	Tue 7/21	~	wed 7722	~	Thu 7723	~	FII	//24 7	•	Sat
28	29	9 3	30	1	2	Patient Groups	_													
5	6	3	7	8	9 -	Send Email														
12	1:	3 1	14	15	16	Send Referral														

## 2. Select the **Demographics** tab.

+ Add new patie	nt	Important	Demographics	Insurances	Authorizations	Smoking Status	Flags	Balance	DrChrono Payments
Demographics		Demographics	6						
Appointments			Patient SSN	111-11-1111					
Clinical Dashboard		P	atient Date of birth	02/07/1984	e.g. 8/8/1979				
Documents		Approx Age	e (if DOB unknown)						
Eligibility			Sex	Female	~				
Tasks	3		Gender Identity	Unknown	~				
Problem List	2		Sexual Orientation	Unknown	~				
Medication List	4		Race	-					
Send eRx									

3. Scroll down to the **Referring Doctor** section and enter the information for the provider.

## **Referring Doctor**

Referring Doctor Search	+	Will populate fields below
Referring Dr. First Name	Edward	
Referring Dr. Middle Name		
Referring Dr. Last Name	Jenner	
Referring Dr. Suffix		
Referring Dr. NPI Number	9876543210	
Referring Dr. Qualifier	Qualifier 🗸	]
Referring Dr. Number		
Referring Dr. Specialty	Primary Care Physician	]
Referring Dr. Address	328 Gibraltar Dr.	
	Sunnyvale, CA 94089	
Referring Dr. Email		1
Referring Dr. Phone	(9.4.4) EGD 9629	J
Ū	(844) 569-8628	J
Referring Dr. Fax	XXX-XXX-XXXX	J
Referring Source	+	
Primary Care Physician		
Referral Number		

If you have already added the provider as a contact, you can use the **Referring Doctor Search** field to add the existing contact as the referring provider. You can save the referring doctor as a contact by selecting **Create New Contact**.

## **Referring Doctor**

Referring Doctor Search	doctor test	Will populate fields below
Referring Dr. First Name	Doctor Test Fax: +1 443-555-5555	
Referring Dr. Middle Name	Create New Contact	
Referring Dr. Last Name	Jenner	
Referring Dr. Suffix		
Referring Dr. NPI Number	9876543210	
Referring Dr. Qualifier	Qualifier 🗸	)
Referring Dr. Number		
Referring Dr. Specialty	Primary Care Physician	)
Referring Dr. Address	328 Gibraltar Dr.	
	Sunnyvale, CA 94089	
Referring Dr. Email		]
Referring Dr. Phone	(844) 569-8628	)
Referring Dr. Fax	XXX-XXX-XXXX	]
Referring Source	+	
Primary Care Physician		
Referral Number		

4. When finished scroll down and click Save Demographics.

Miscellaneous										
	Signature On File	Consent On File	~							
	Default Pharmacy	Walgreens #00689, 940402701	Set Remove							
	Save Der	nographics								