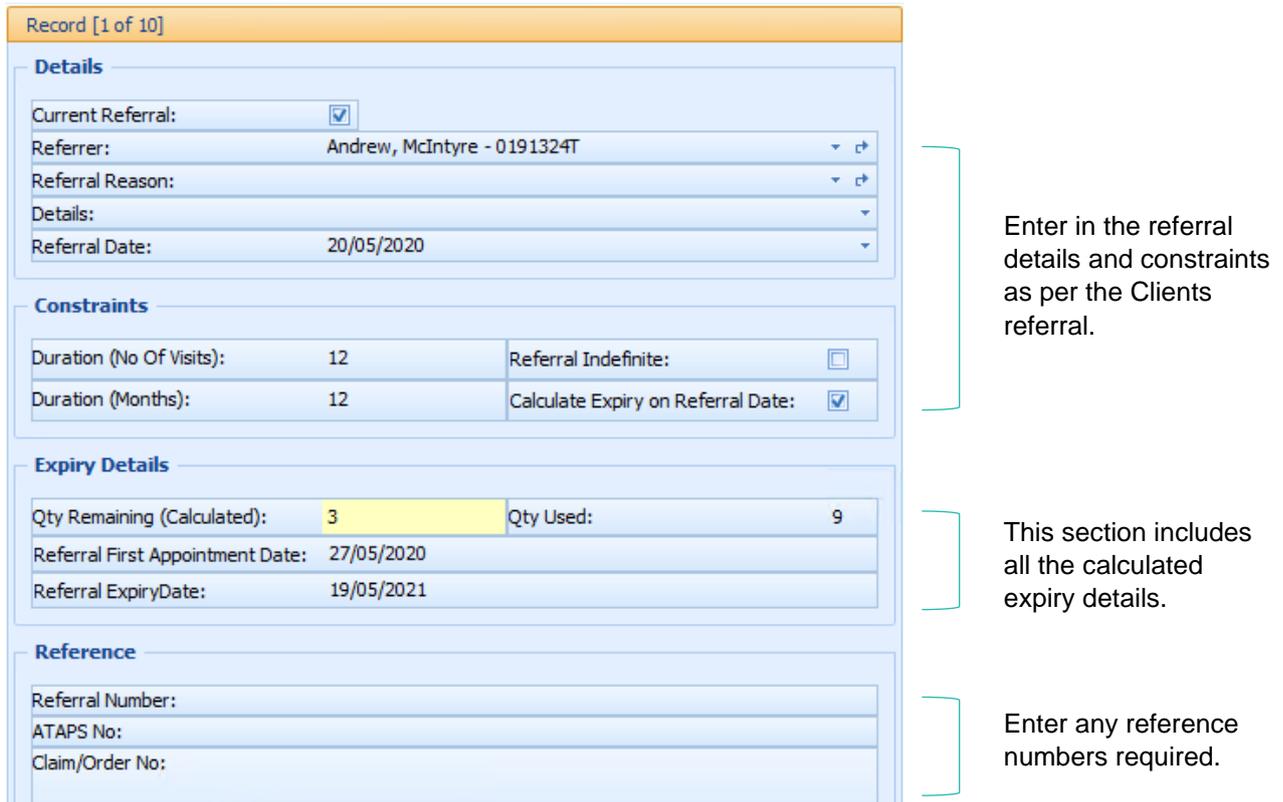


Referral details update

Quick reference guide - V7 SP1

Update to the Referral screen layout



Record [1 of 10]

Details

Current Referral:

Referrer: Andrew, McIntyre - 0191324T

Referral Reason:

Details:

Referral Date: 20/05/2020

Constraints

Duration (No Of Visits): 12 Referral Indefinite:

Duration (Months): 12 Calculate Expiry on Referral Date:

Expiry Details

Qty Remaining (Calculated): 3 Qty Used: 9

Referral First Appointment Date: 27/05/2020

Referral ExpiryDate: 19/05/2021

Reference

Referral Number:

ATAPS No:

Claim/Order No:

Enter in the referral details and constraints as per the Clients referral.

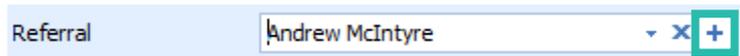
This section includes all the calculated expiry details.

Enter any reference numbers required.

Calculate expiry based on Referral Date

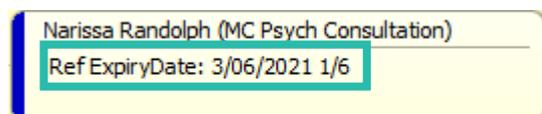
The expiry date can be calculated two ways:

1. By default, once the first appointment is attached to the referral, the **Referral Expiry Date** is calculated.
2. OR, Checking **Calculate Expiry on Referral Date** box in the **Constraints** section will calculate the expiry date from the **Referral Date** entered plus the **Duration (Months)**
 - a. This can also be added via the Edit Appointment > Add a referral option.



Displays both Expiry date and Duration (No. of Visits) on the appointment

The **Referral Expiry Date** can be used in conjunction with **Duration (No of Visits)** and both pieces of expiry information will be displayed in the appointment.



Last updated: Tuesday, 27 October 2020