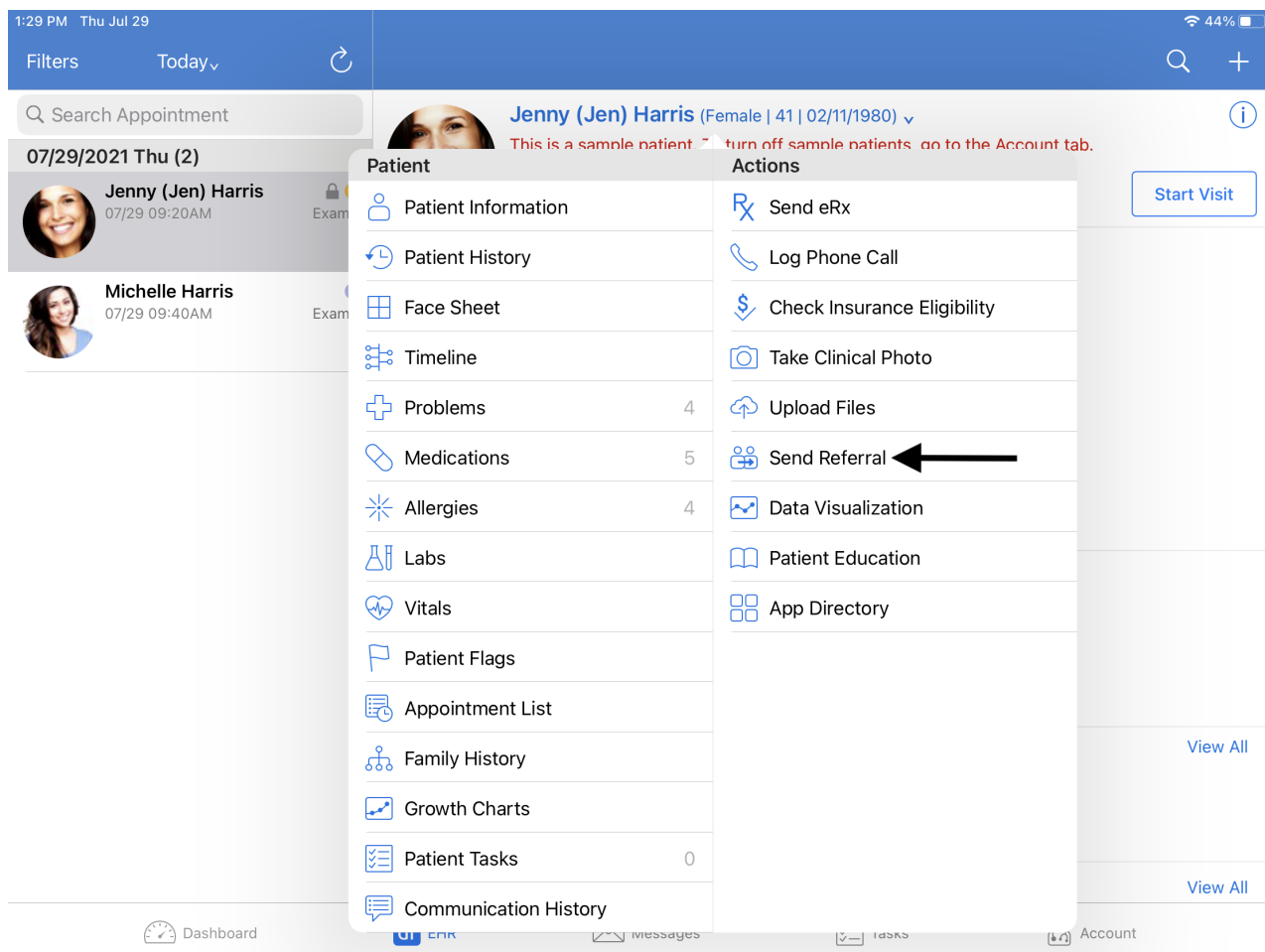


# Sending a Referral through the iPad

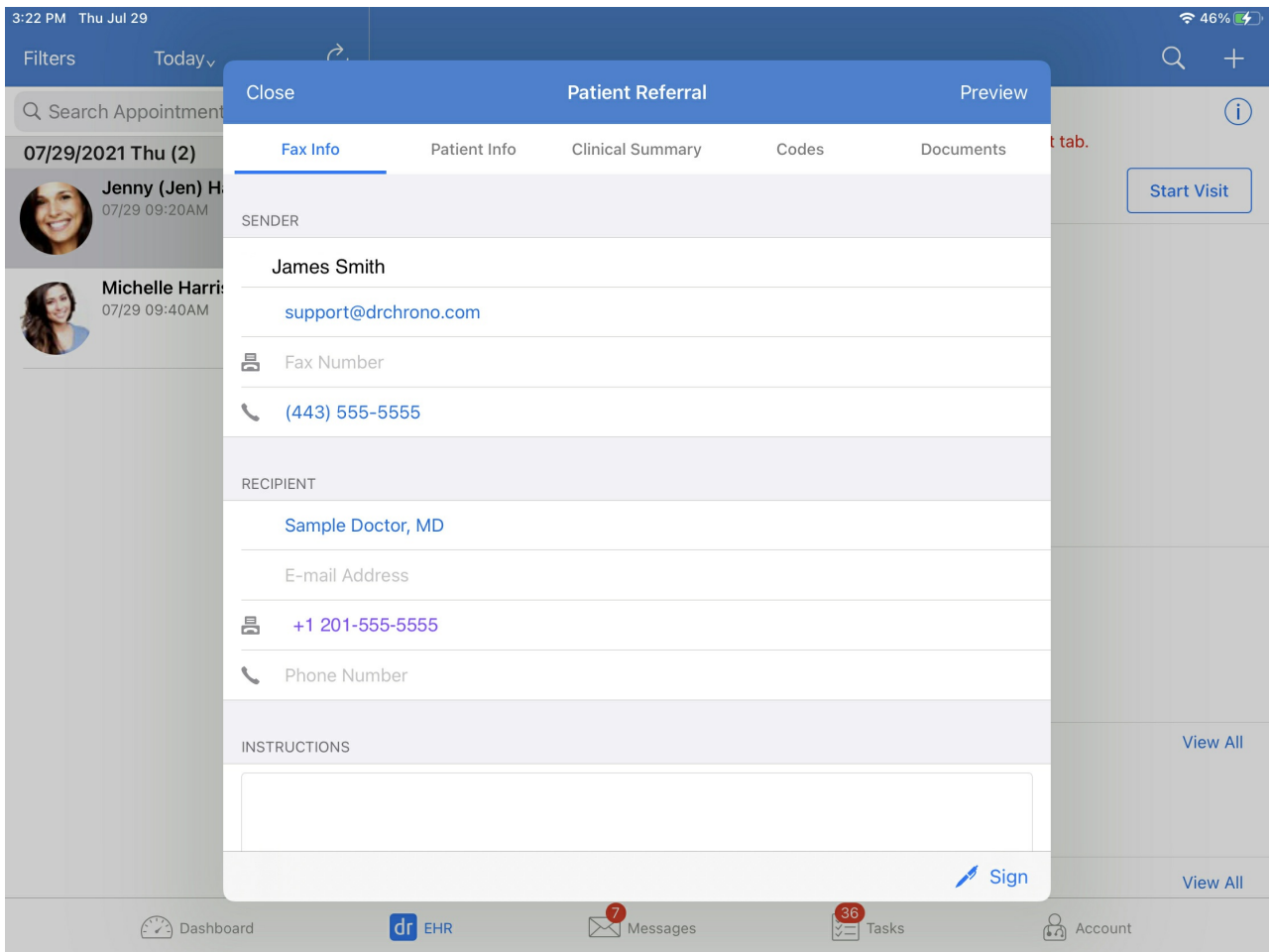
07/08/2024 7:27 pm EDT

Similar to [referrals](#) on the web, you can easily send a patient referral through the iPad EHR app.

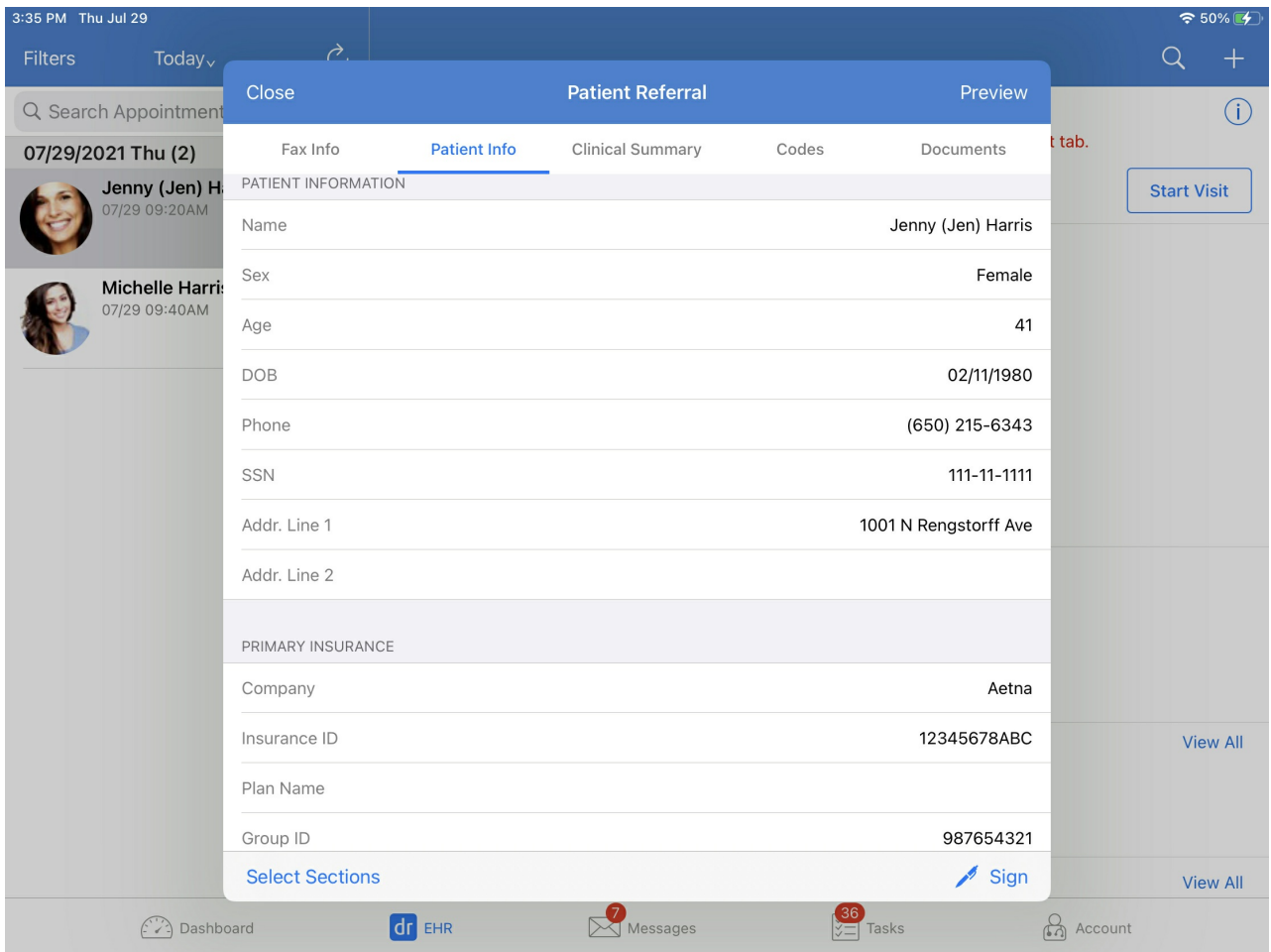
1. Tap on the patient's name and select **Send Referral**.



2. A window will open. First, enter the recipient's information.

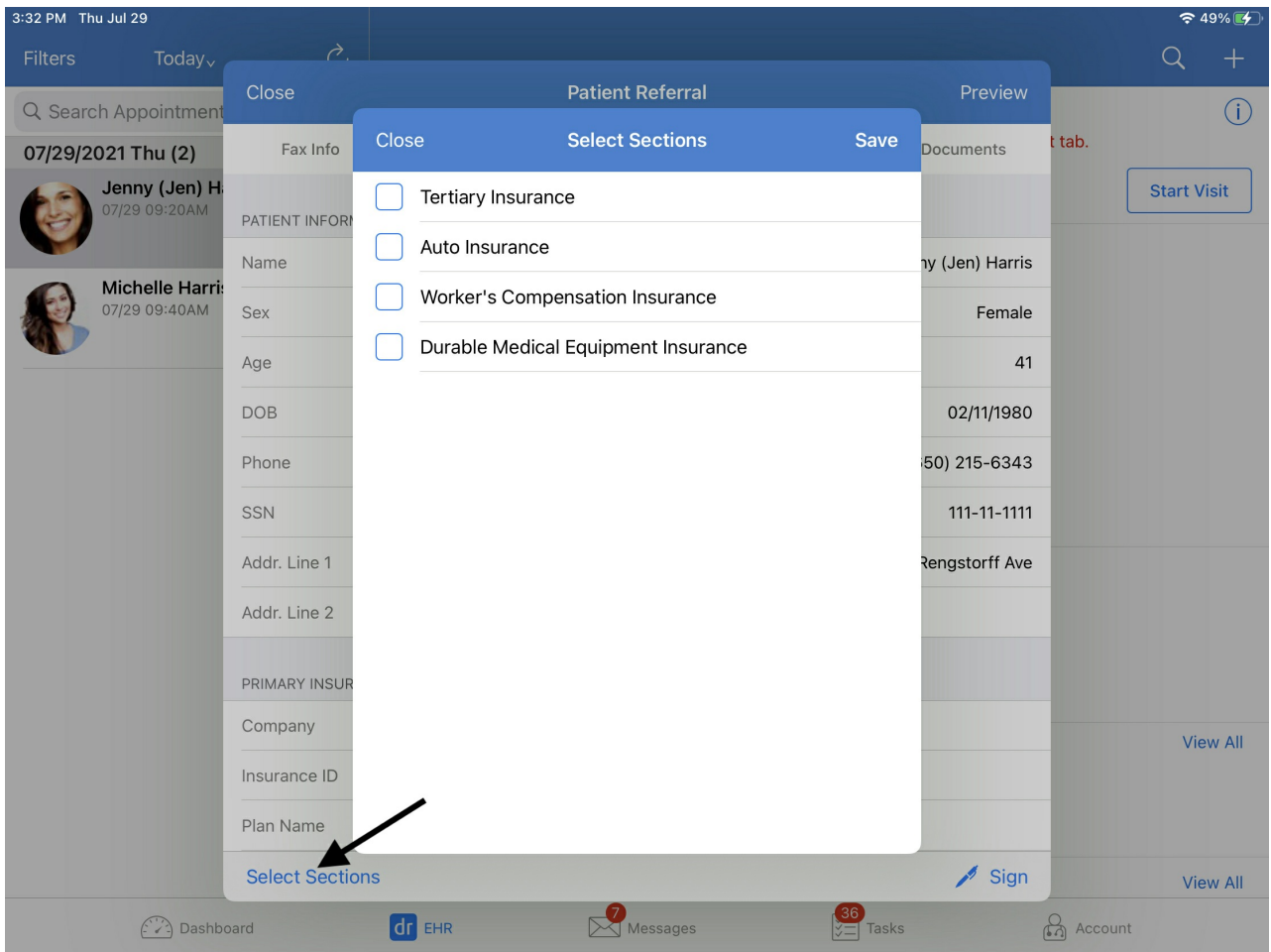


3. Verify the patient's information. Any information that needs to be changed here will need to be edited in the patient's chart.



Tap **Select Sections** to add:

- Tertiary Insurance
- Auto Insurance
- Worker's Compensation Insurance
- DME Insurance



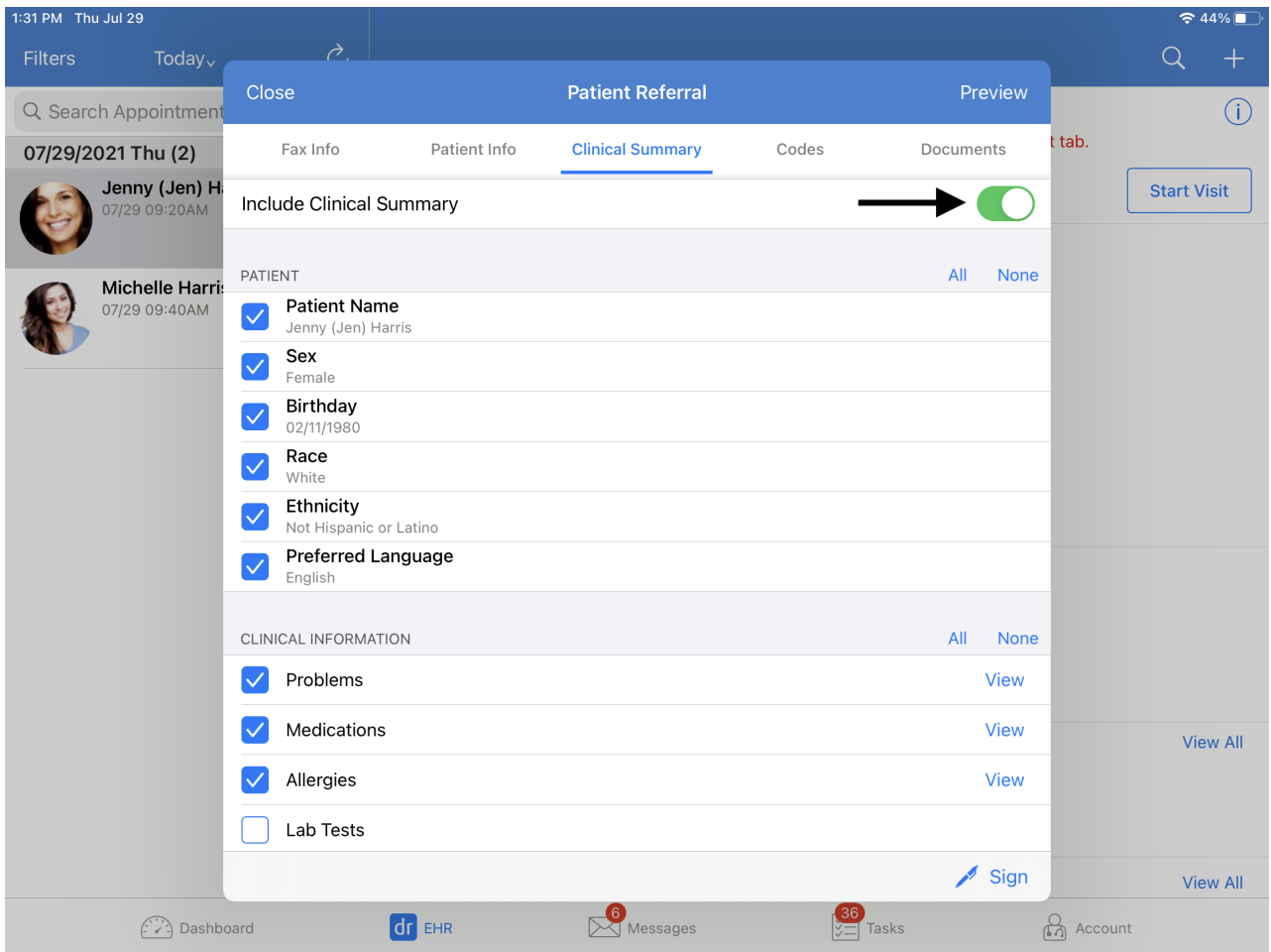
4. By default the **Clinical Summary** will be included in the referral. You can exclude it by deactivating the switch (



) to (



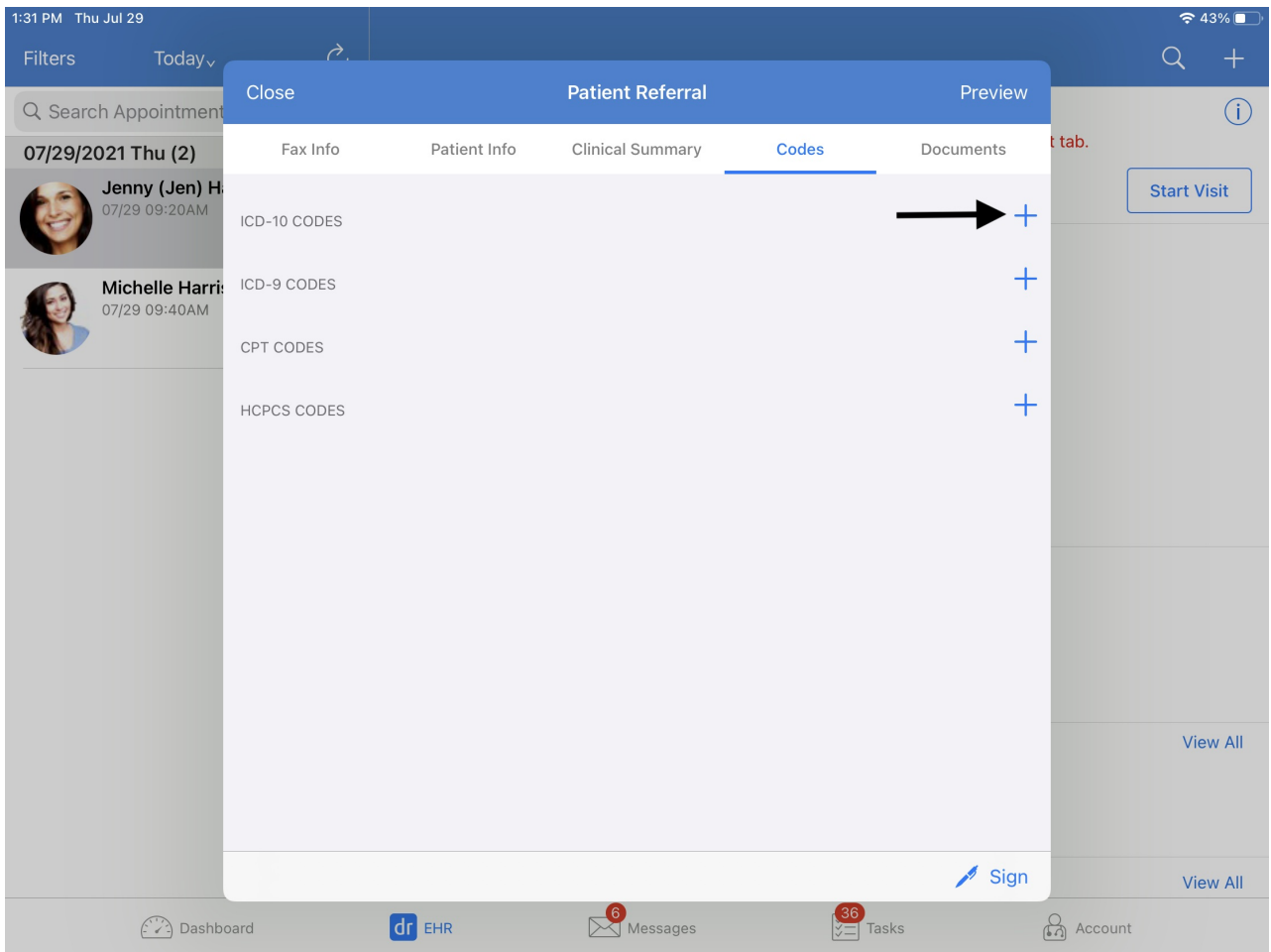
). You can also check or uncheck the boxes for information you would like to include or exclude.



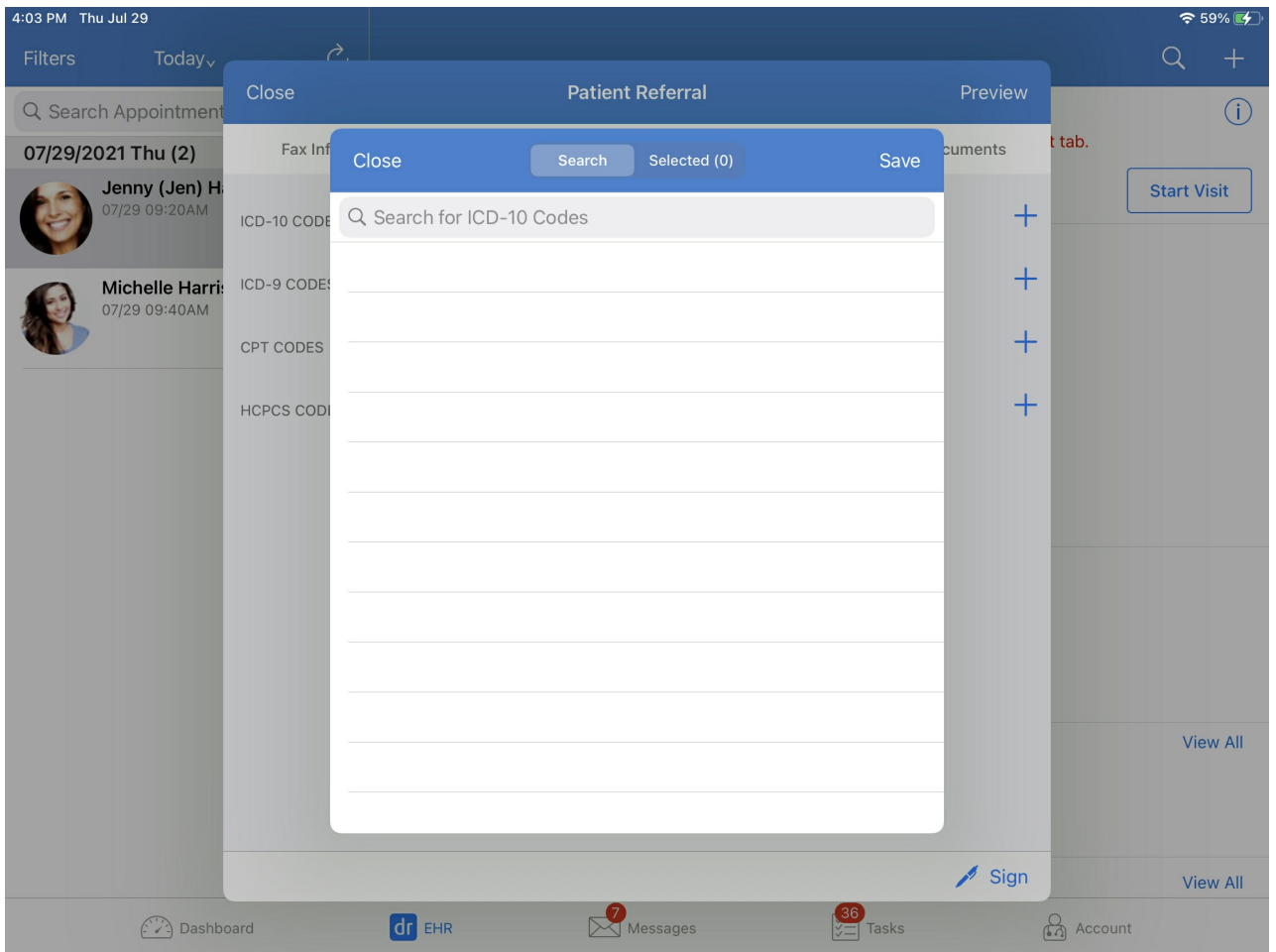
5. Select any relevant codes by tapping on the (



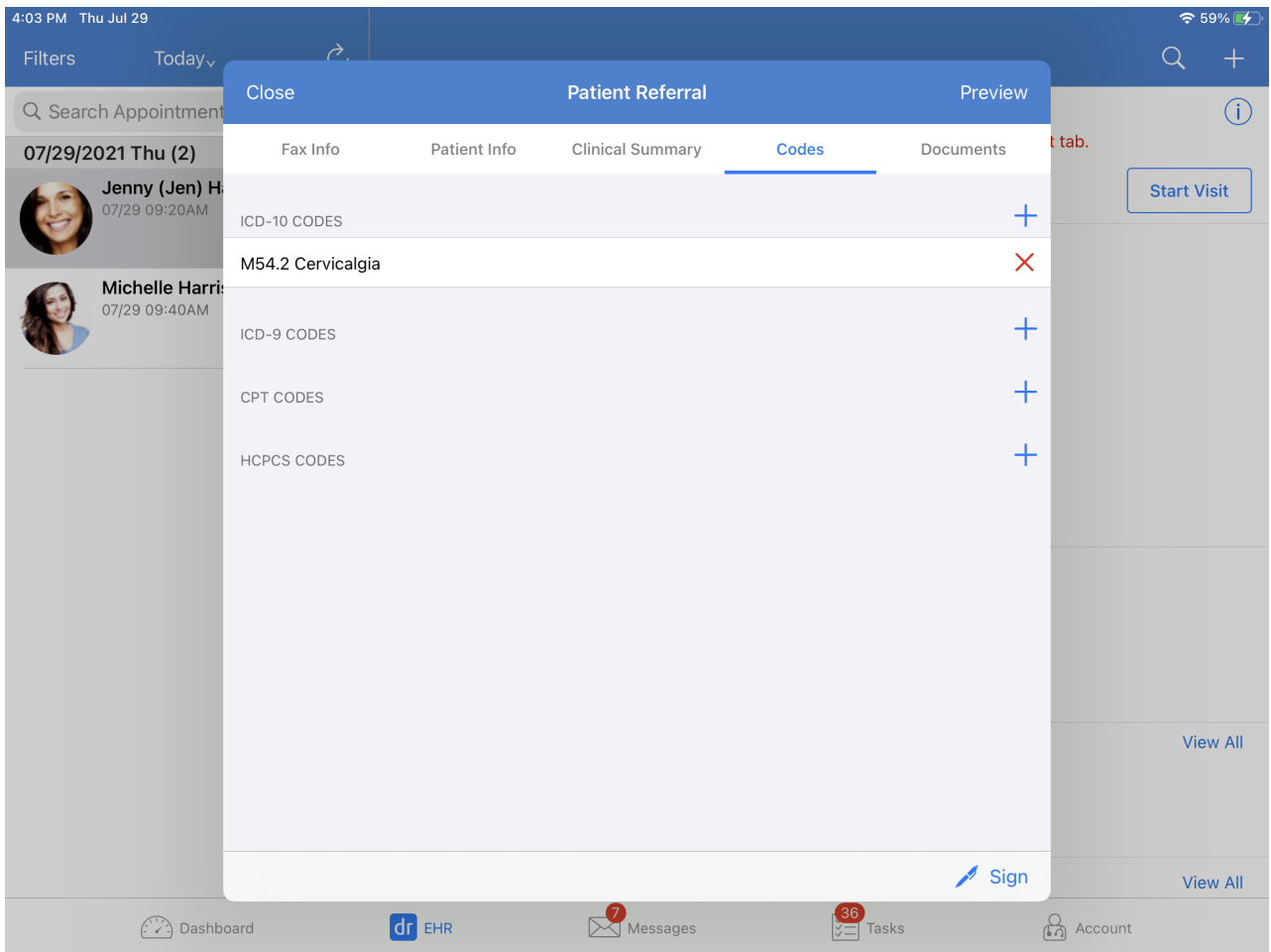
) icon.



Search for the codes.



Selected codes will be added.

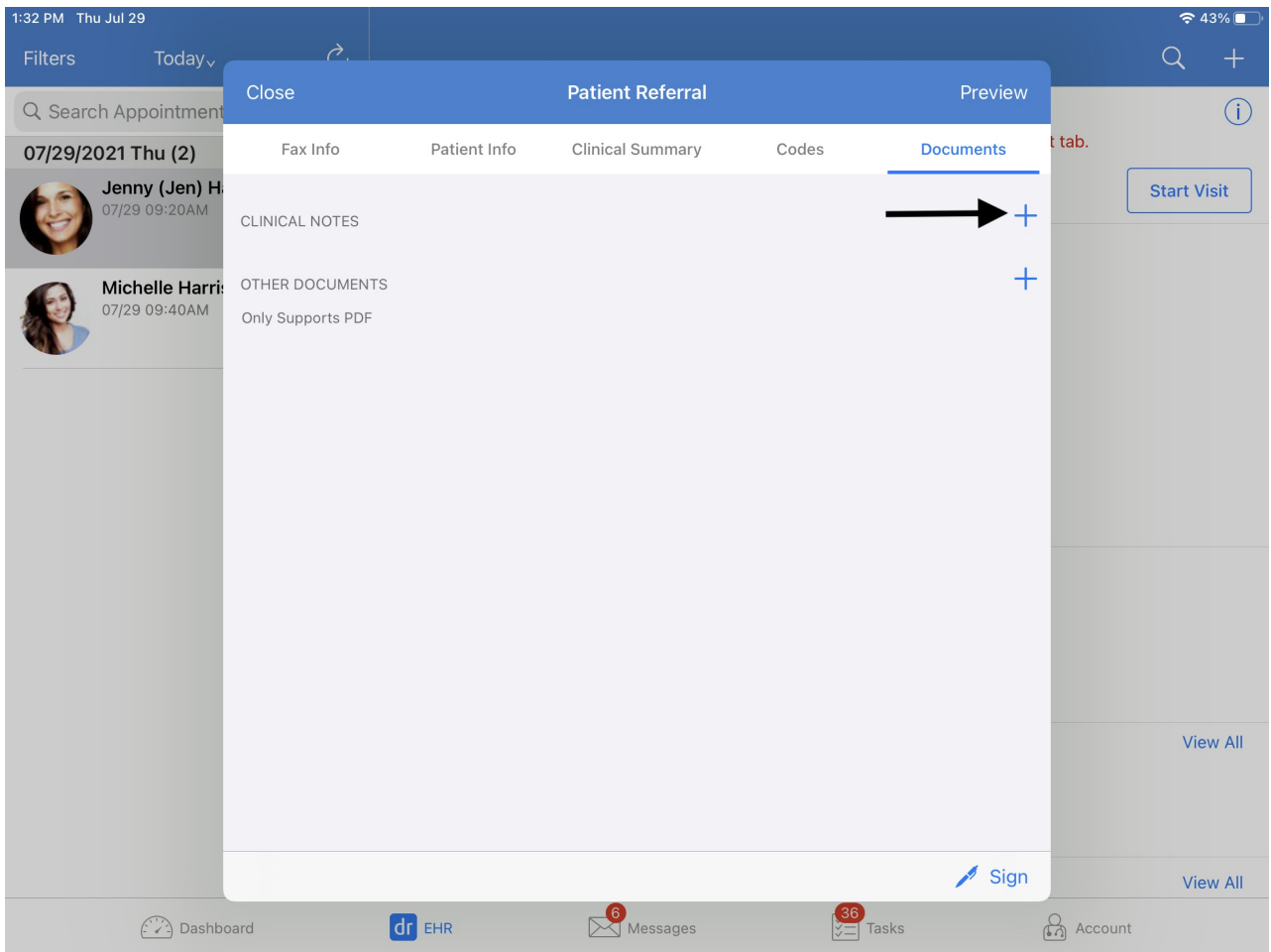


6. Select any documents you would like to include by tapping on the (

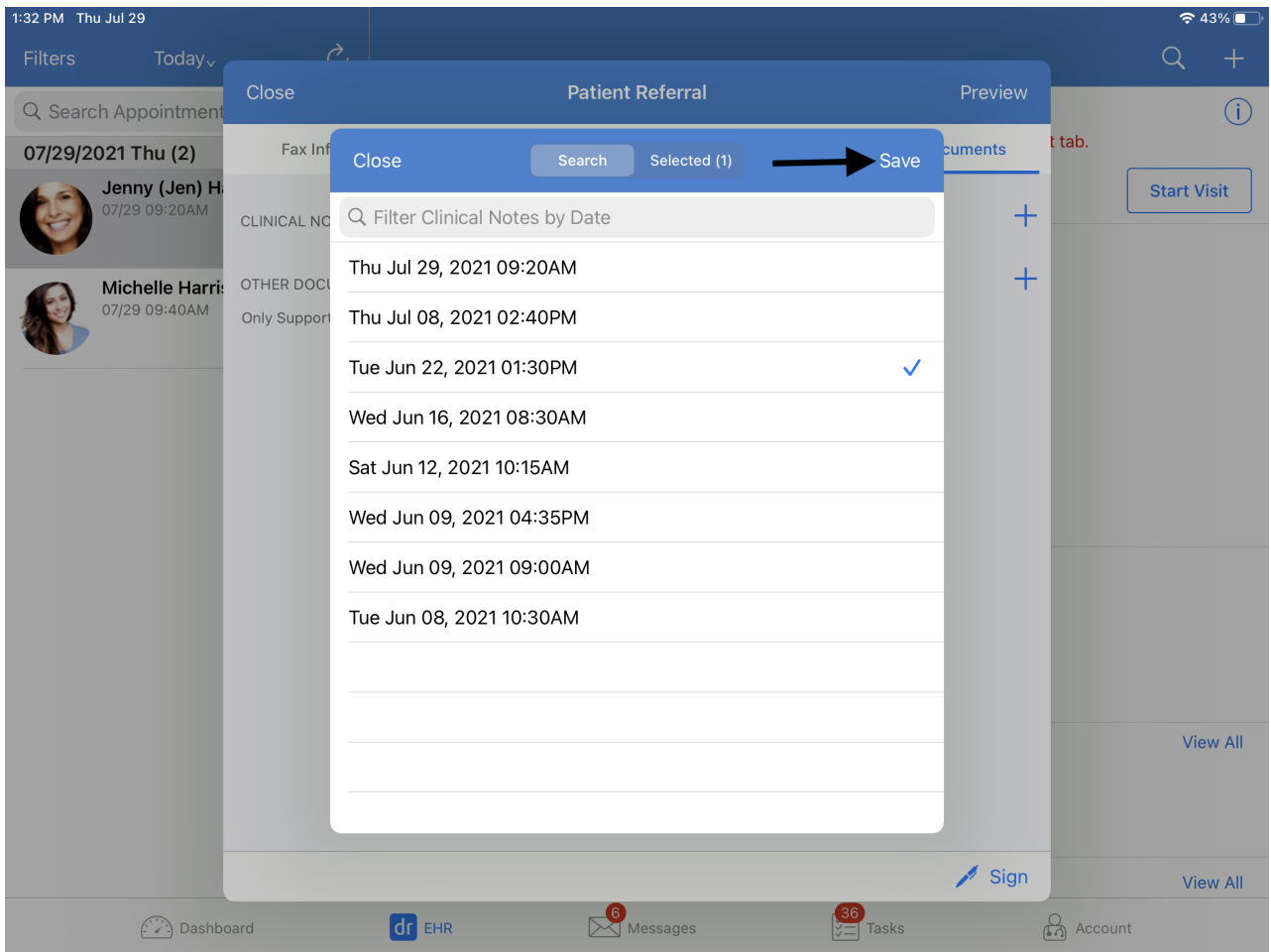


) icon.

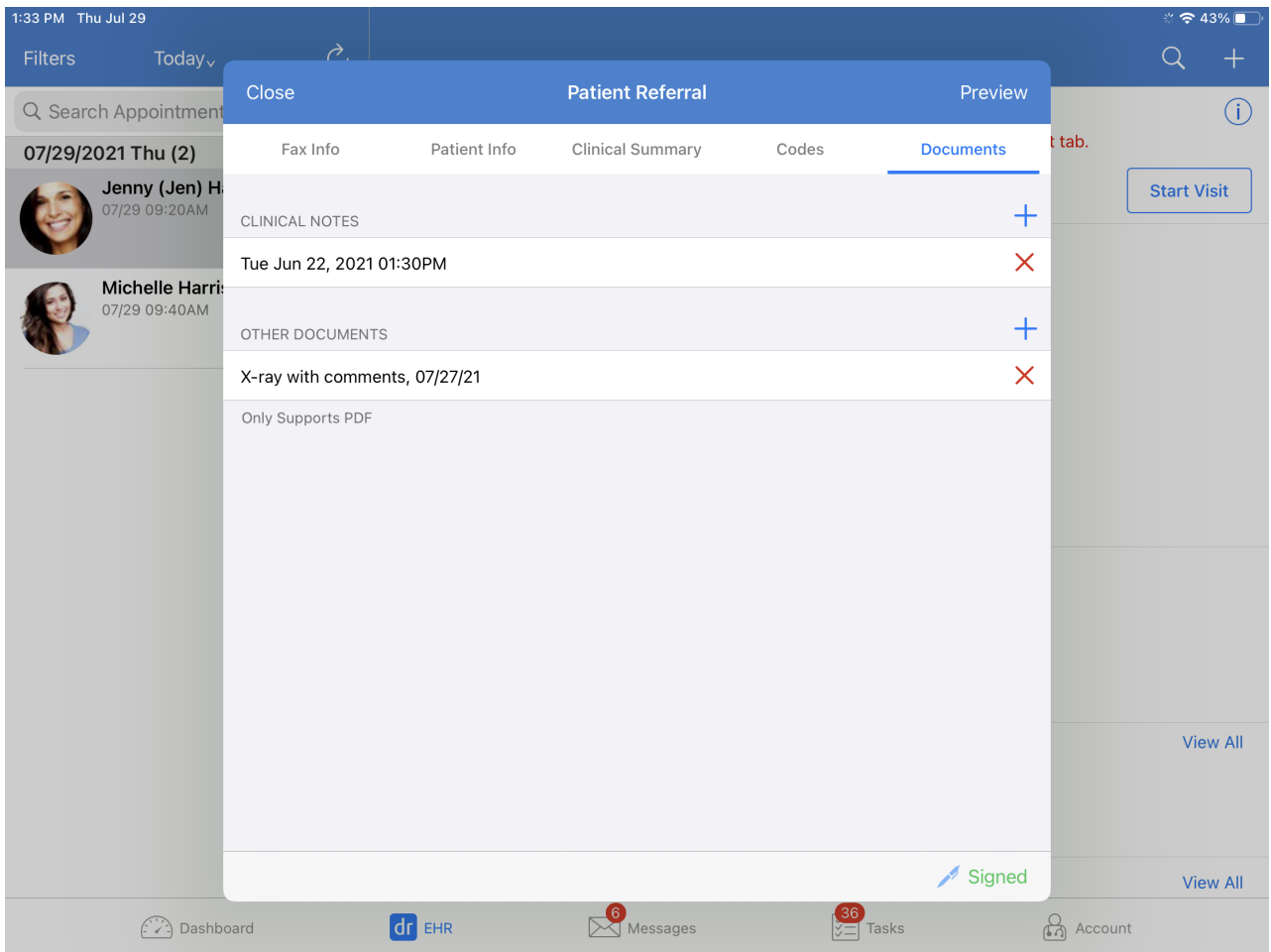




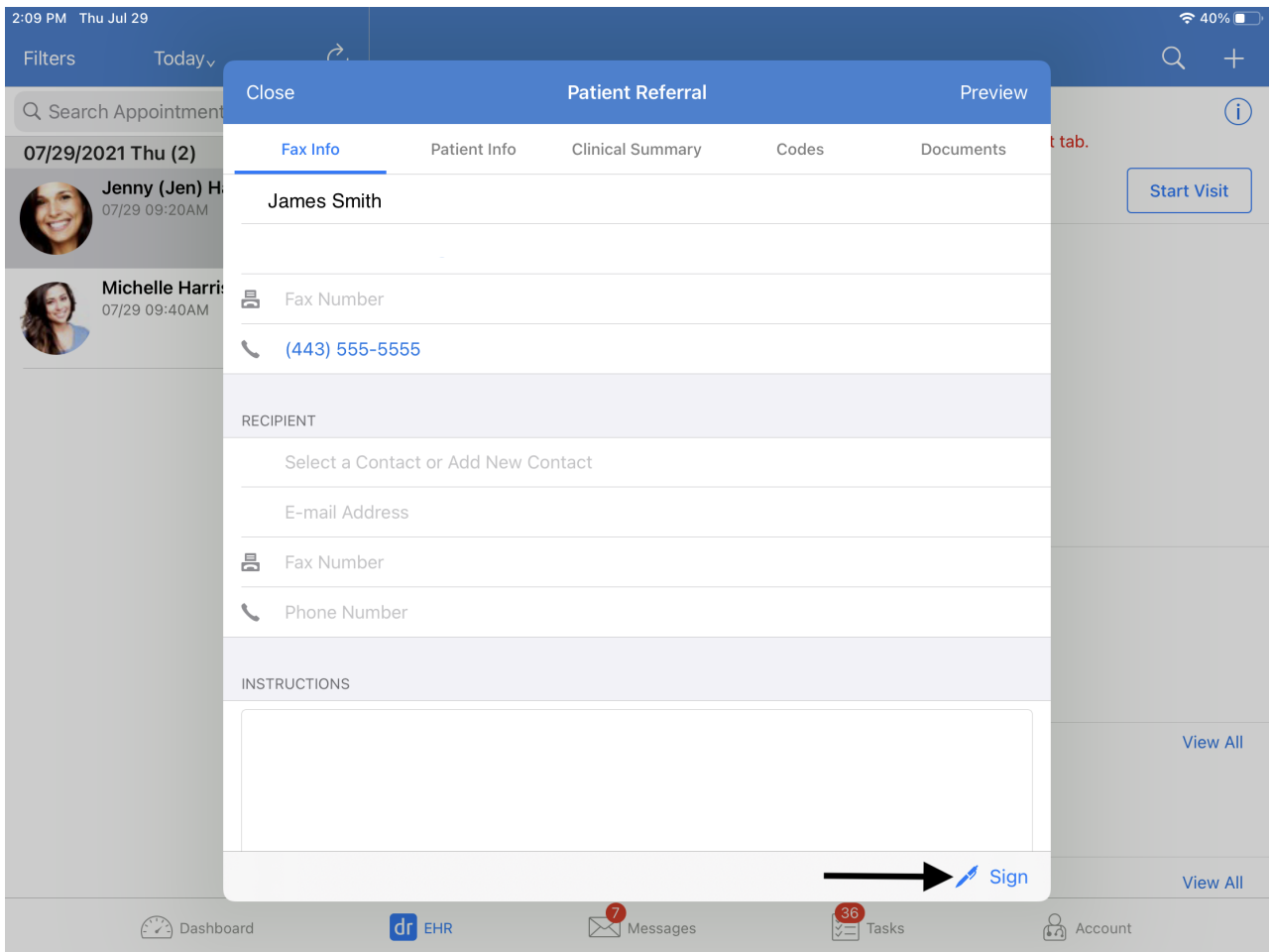
Tap any documents, like clinical notes, you would like to add and **Save**.



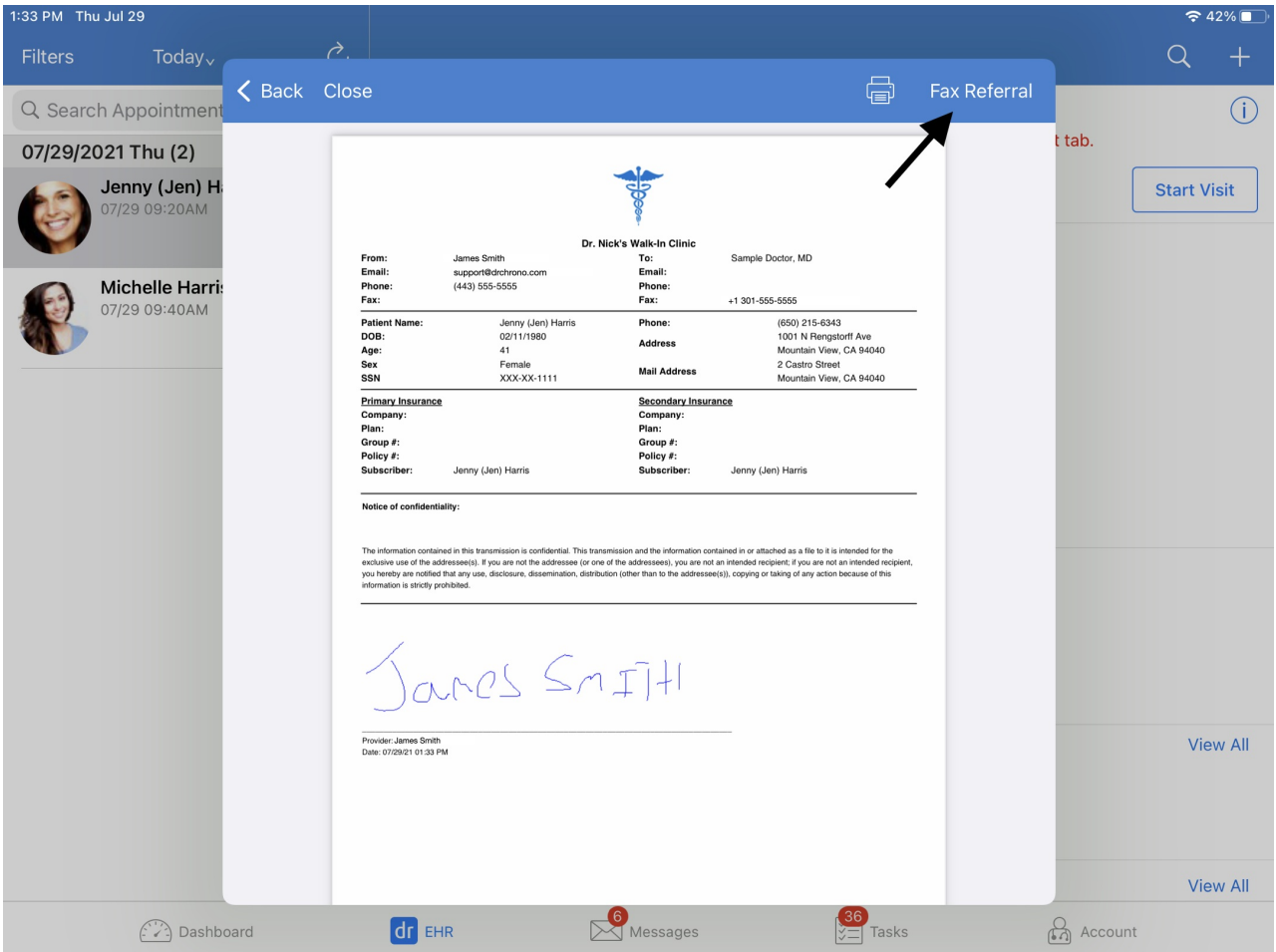
The selected documents will appear in the referral.



7. Optionally, you can sign the referral by selecting **Sign**. Tap **Preview** in the upper right when finished.



8. Select **Fax Referral** to fax or the print icon to print.



9. The referral will send and you will see a success message when it is complete.

