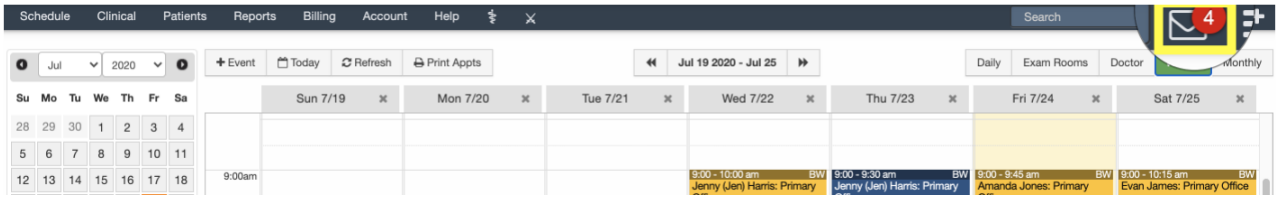
Sending a Referral (Web)

Last modified on 10/24/2025 10:11 am EDT

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.

> The Documents section only supports the PDF file format.

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.

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

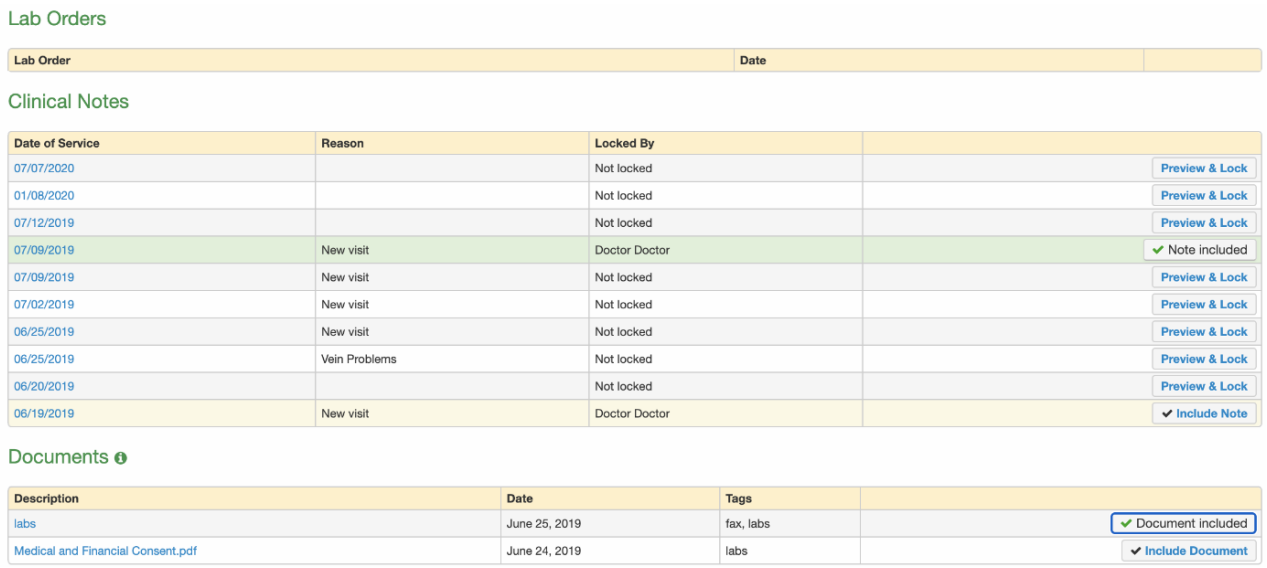
4. This will bring you to a list of your recently seen patients. You can select a patient from this list or search for the desired patient in the search bar located in the upper right corner.

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**.

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.

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

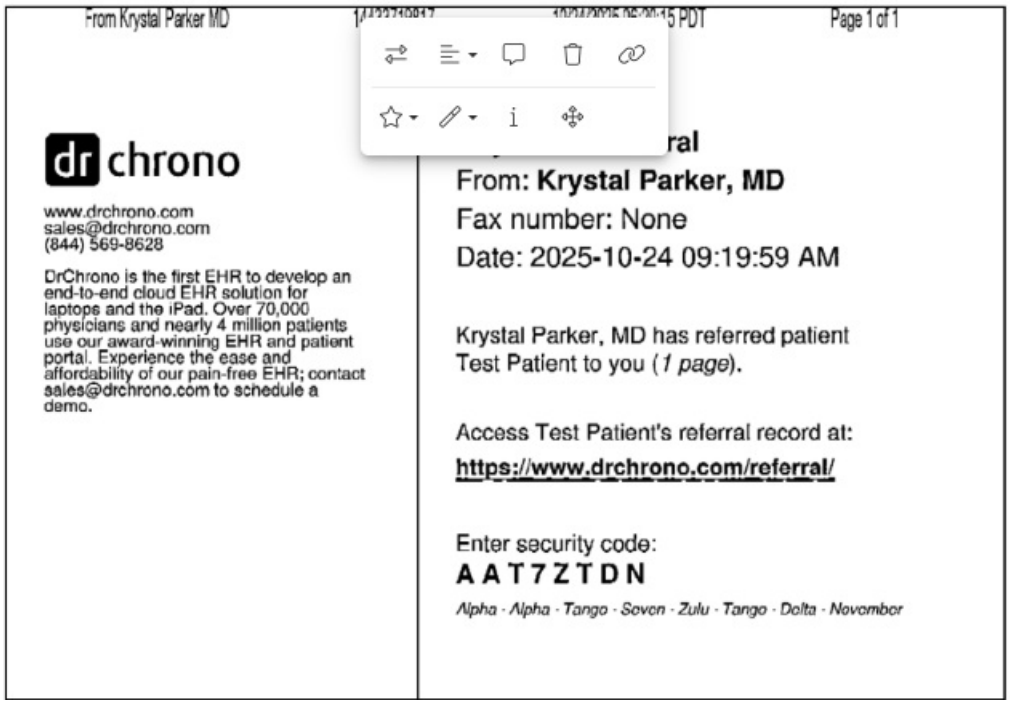
Description	Date	Tags	
labs	June 25, 2019	fax, labs	✔ Document included
Medical and Financial Consent.pdf	June 24, 2019	labs	✔ Include Document

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**.

There are two options to send a referral: Click on the fax button dropdown.

- Fax referral - all pages will be sent, and each page will count towards the user's monthly fax allotment.
- Send Referral Free - the recipient will receive a one-page fax that includes a passcode providing access to the referral. This option does not count towards the user's monthly allotment.



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