Referral Settings

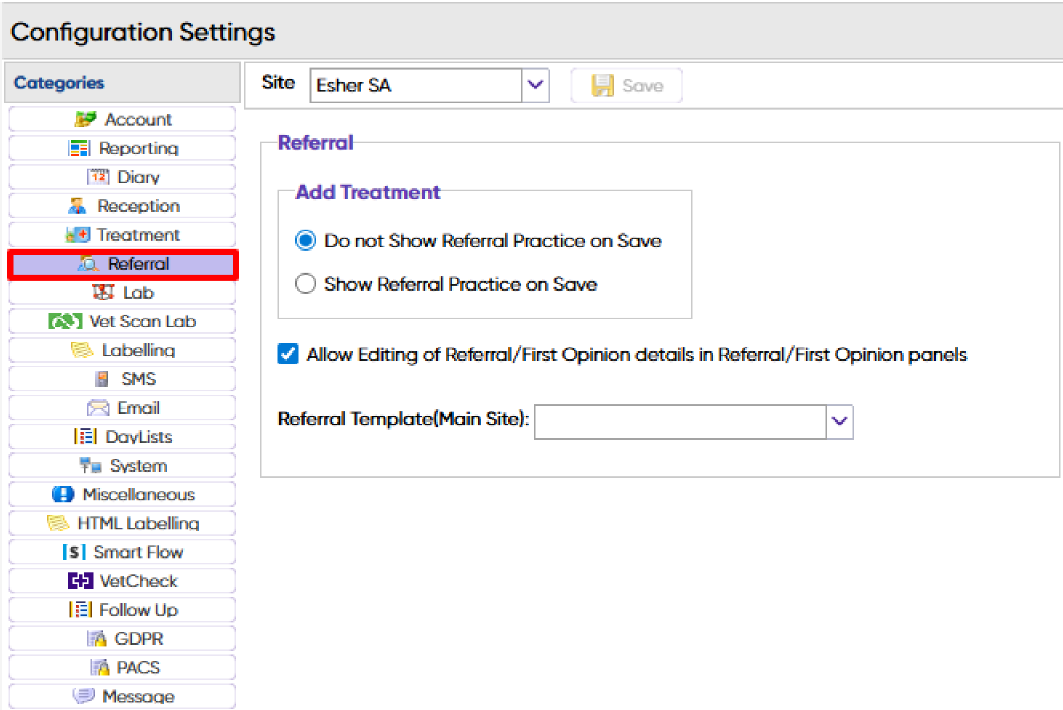
30/07/2025 4:30 pm BST

Summary

Referral Settings can be accessed via: Administration > Settings and selecting the 'Referral' category.

This page documents each setting.

Details



Add Treatment

Show Referral Practice on Save = Prompts user to select a referral practice when saving treatment onto the Patient's record.

Do not Show Referral Practice on Save = No action, do not display prompt.

Allow Editing of Referral/First Opinion details in Referral/First Opinion panels

Enabled = Users are able to maintain Referral details through the Patient Details > Referrals screen (rather than modifying through the libraries screen).

Disabled = Users can maintain Referral details through libraries only.

Referral Template (Main Site)

If a Client Document is specified here, this template is attached to an email by default when using the Referral Wizard.

Note: This is a global system parameter (not site specific).