

Referral Settings

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Summary

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

This page documents each setting.

Details

The screenshot shows the 'Configuration Settings' interface. On the left is a 'Categories' sidebar with a list of settings: Account, Reporting, Diary, Reception, Treatment, Referral (highlighted with a red box), Lab, Vet Scan Lab, Labelling, SMS, Email, DayLists, System, Miscellaneous, HTML Labelling, Smart Flow, VetCheck, Follow Up, GDPR, PACS, and Message. The main area is titled 'Referral' and contains the following settings:

- Site:** Esher SA (dropdown menu) with a 'Save' button.
- Add Treatment:** A section with two radio buttons:
 - Do not Show Referral Practice on Save
 - Show Referral Practice on Save
- Allow Editing of Referral/First Opinion details in Referral/First Opinion panels
- Referral Template(Main Site):** (dropdown menu)

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).
