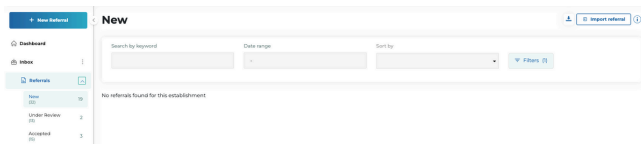


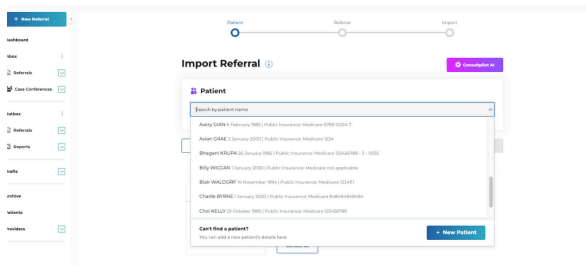
# How to Import a Referral

**Step 1:** Click the **'New'** subfolder in the side panel under the **'Referrals'** folder.

**Step 2:** Click **'Import referral'** in the top right corner.



**Step 3:** To find an existing patient, enter their name in the search bar. To manually add a new patient, click the dropdown menu under **'Patient'** and select **'+ New Patient'**.

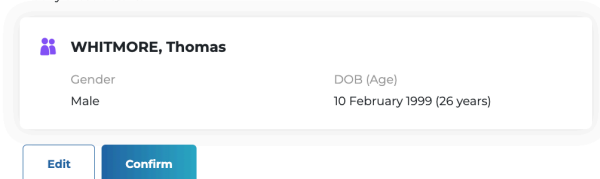


**Step 4:** Fill in or edit all mandatory patient details then click **'Save Patient'**.

**Step 5:** Review the patient details in the pop-up, click **'Confirm'**, then select **'Next step'** to continue.

**Confirm patient**

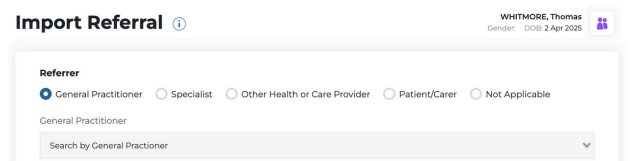
Please ensure that you have correctly entered the patient's details.  
Once confirmed, this action cannot be undone and you will no longer have the option to modify these details.



**Alternative Step:** Use Consultpilot AI to automatically fill in patient details. Click **'Consultpilot AI'** (See video [here](#) for instructions).



**Step 6:** Select the referrer type from the options displayed. Search for the referrer or click **'+Add'** to add their details manually.



**Step 7: 'Attach Referral Letter'** or complete the **'Clinical Assessment'** section.

**Note:** You also have the option to upload **'Other Correspondence'** and add an **'Internal note'**.

**Step 8:** Add the referral date and select the referral period. Update tracking and notification preferences as needed, then click **'Import Referral'**.

