FOR REFERRING DOCTORS

Referral Portal Guide

Send a referral, book your patient's visit, and follow their care from one place. This guide walks through each step.

PORTAL ADDRESS **referrals.visionairytech.com**

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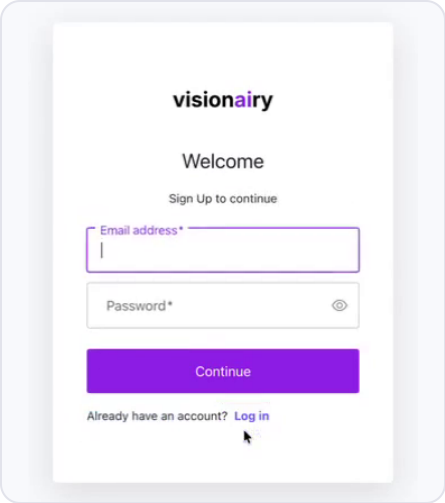
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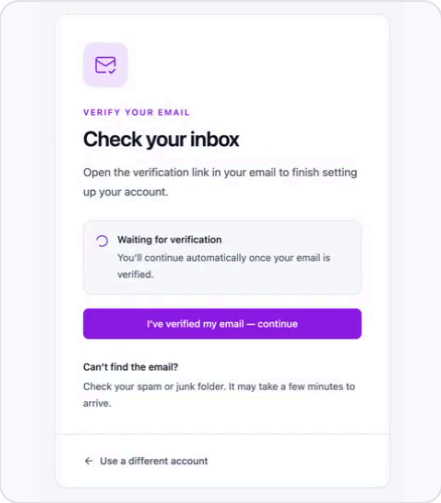
STEP 1

Create your account

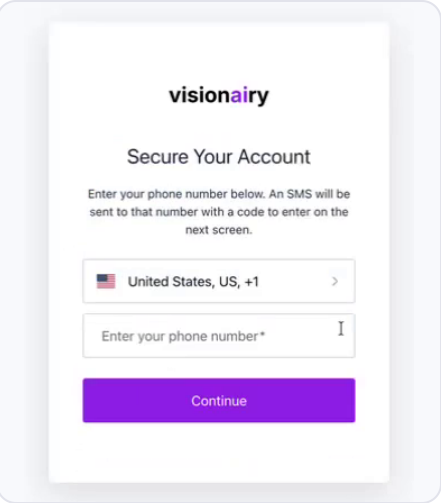
You only do this once. Go to **referrals.visionairytech.com** and choose **Sign up** under the login form.



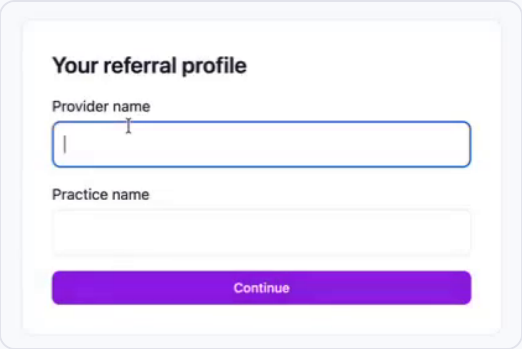
1 **Enter your email and a password.** The password needs at least 10 characters. Select Continue.



2 **Verify your email.** Open the link we send you, on your computer or phone. The portal continues on its own, or select "I've verified my email".



3 **Set up two-factor authentication.** Enter your mobile number, then type the 6-digit code we text you.



4 **Set up your referral profile.** Enter your provider name and practice name, then select Continue. This is how the receiving practice will see you on each referral.

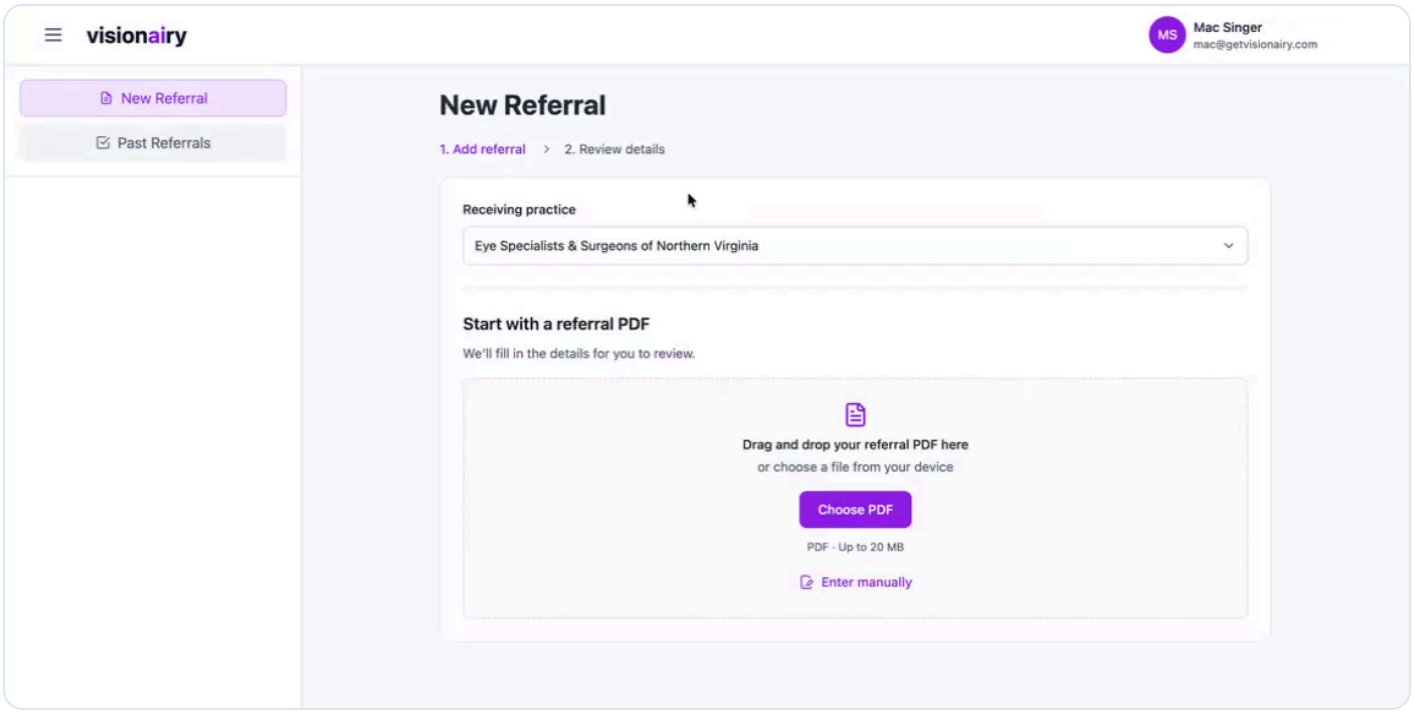
Can't find the verification email? Check your spam or junk folder. It can take a few minutes to arrive.

No text message? Select Resend on the code screen, or Edit to correct the number.

STEP 2

Start a referral

Select **New Referral** in the left menu. If you already have a referral letter as a PDF, the portal reads it and fills in the form for you.



1. **Choose the receiving practice.** Pick the practice you are sending the patient to from the Receiving practice menu.
2. **Add your referral PDF.** Drag the file onto the upload area, or select Choose PDF and pick it from your computer. Files can be up to 20 MB.
3. **Wait 30 to 60 seconds while the portal reads the file.** You will see "Checking your file" and then "Processing". When it finishes, the Review details screen opens with the form filled in.

No PDF?

Select **Enter manually** under the Choose PDF button and type the referral details yourself.

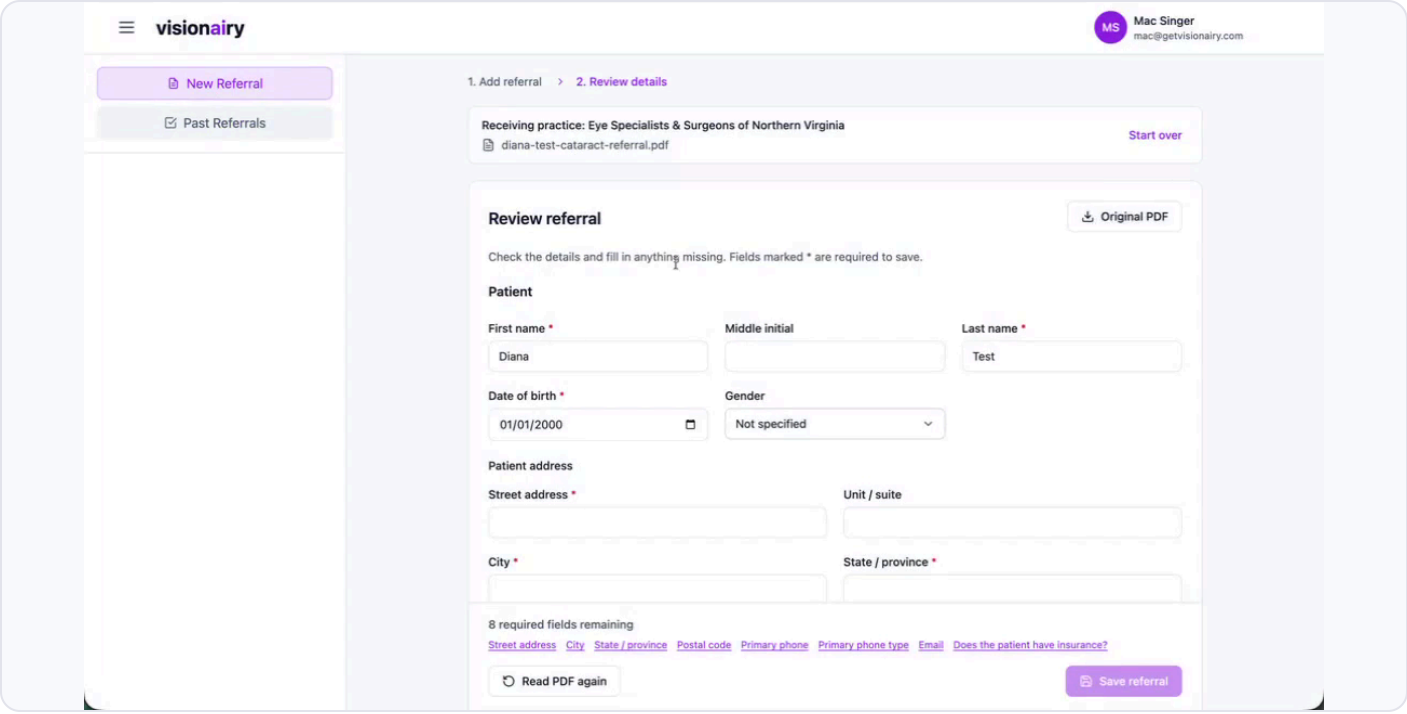
Picked the wrong file?

Select **Start over** at the top right of the review screen to go back and upload a different one.

STEP 3

Review and save

Check what the portal pulled from your PDF and fill in anything it could not find. Fields marked with * are required before you can save.



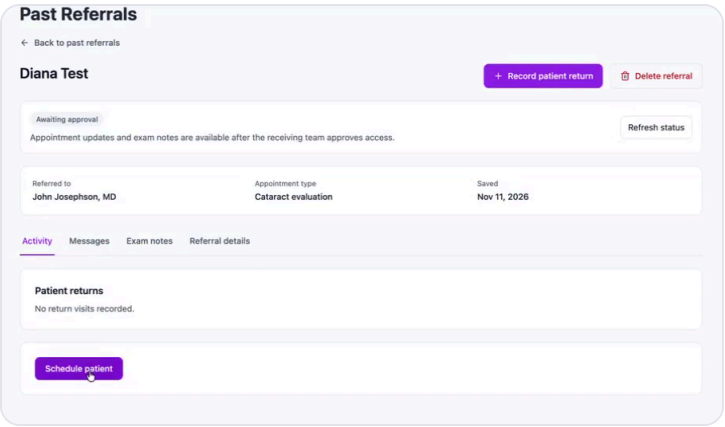
1. **Confirm the patient.** Check the name and date of birth. Add the address, primary phone and phone type, and email if your uploaded documents did not include them.
2. **Confirm the referral details.** Appointment type, receiving provider, and reason for consultation. Fill in any your documents did not state.
3. **Answer the insurance question.** Choose Yes or No. Tick "Include insurance details" to add them but insurance details are not required. The patient is asked for their insurance information later.
4. **Attach supporting documents (optional).** Open Supporting documents and select Attach files. PDF, JPG or PNG, up to 10 files, 20 MB each.
5. **Select Save referral.** The button turns solid purple once every required field is complete.

Use the required fields list. The bar at the bottom of the form counts the required fields still empty. Select a field name there to jump straight to it. **Original PDF** opens your uploaded file, and **Read PDF again** re-runs the reading step.

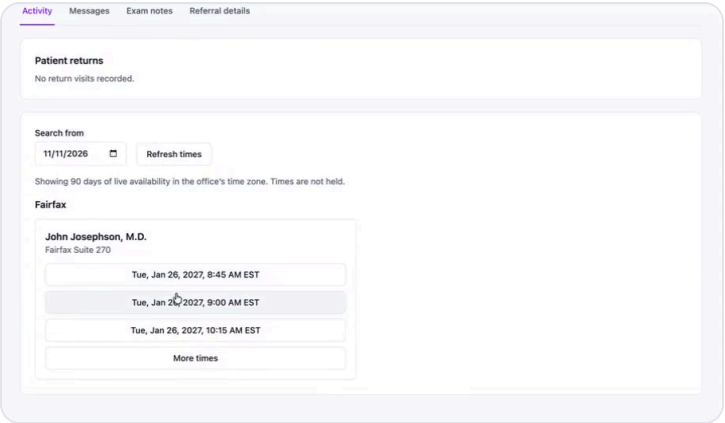
STEP 4

Schedule the patient

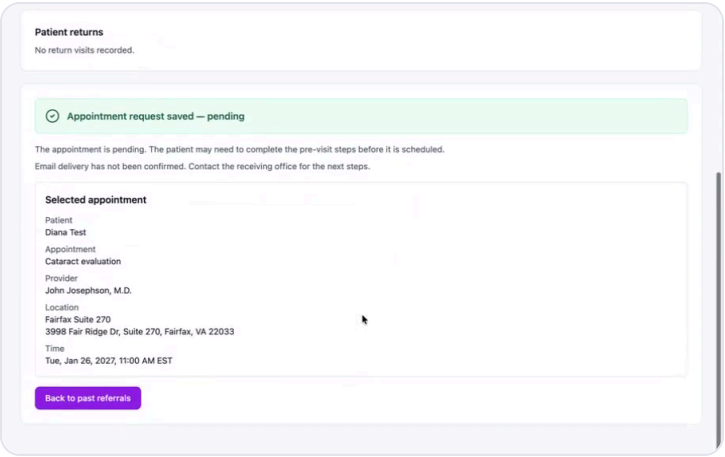
After you save, the referral opens on its own page. You can request an appointment for the patient right away, before they leave your office.



1 **Select Schedule patient.** You will find it on the Activity tab of the referral. A new referral shows "Awaiting approval" at the top. You can still schedule while it is awaiting approval.



2 **Pick a time.** The portal shows 90 days of live availability for the receiving provider, in the office's time zone. Change "Search from" to look later, or select More times. Times are not held until you book.

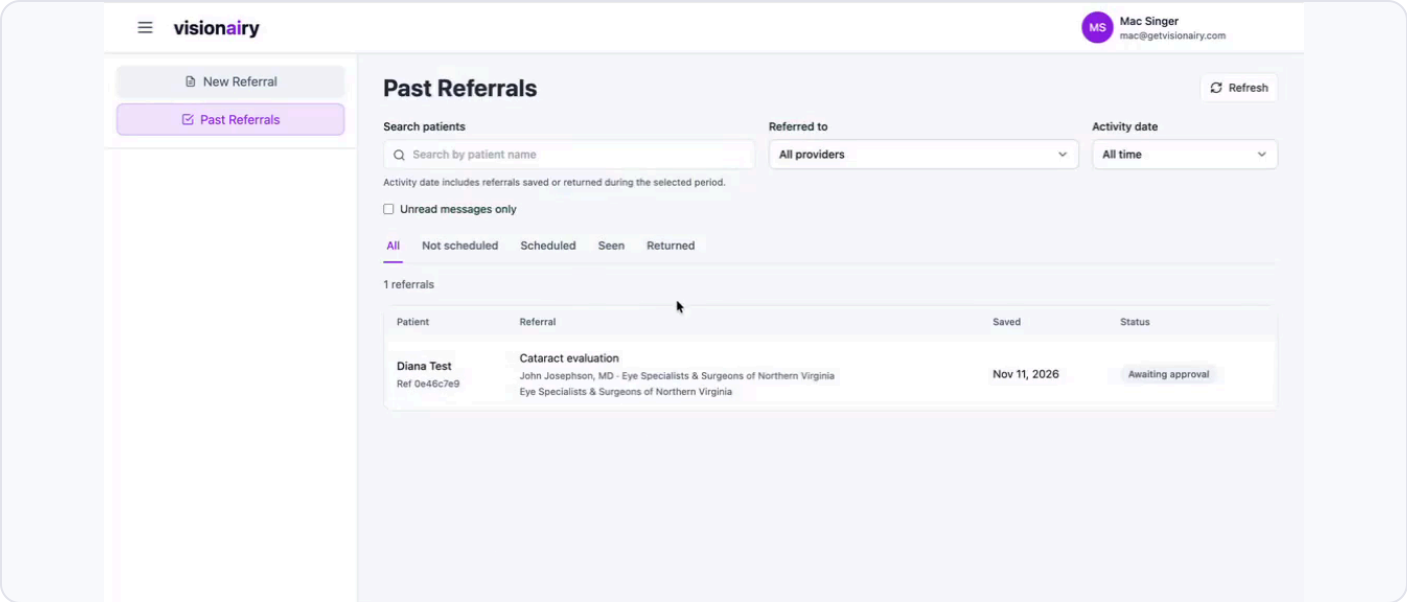


3 **Confirm and book.** Review the patient's email, phone, address and phone type, then select Book appointment. You will see "Appointment request saved, pending" and the visit goes onto the receiving practice's schedule. The patient then receives an email at the address you provided asking for additional information.

STEP 5

Track your referrals

Select **Past Referrals** in the left menu to see every referral you have sent and where each one stands.



Find a referral

Search patients by name.

Referred to narrows the list to one provider.

Activity date limits it to a time period.

Unread messages only shows referrals with a new message.

Filter by progress

The tabs above the list group referrals by where the patient is: **All**, **Not scheduled**, **Scheduled**, **Seen**, and **Returned**.

Select any row to open that referral. Select **Refresh** to update the list.

What the status means

Awaiting approval. The receiving team has not approved access yet. Appointment updates and exam notes appear after they do.

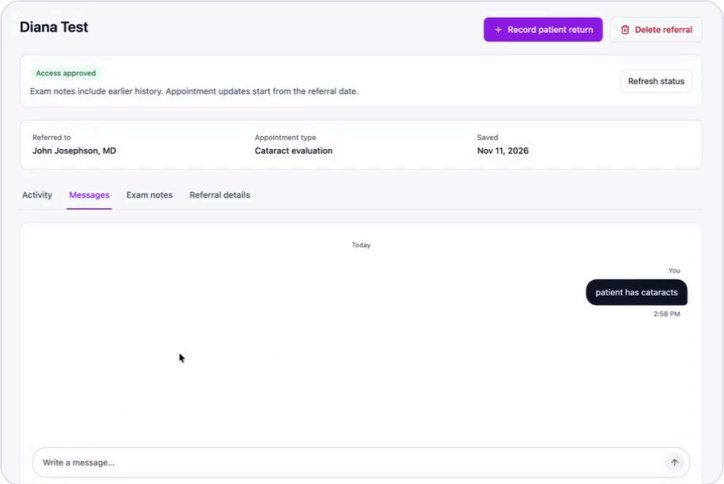
Access approved. You can see appointment updates from the referral date onward, and exam notes the day after a visit occurs.

Not scheduled. Expected right after you book. It changes to Scheduled once the patient completes the form they are emailed.

STEP 6

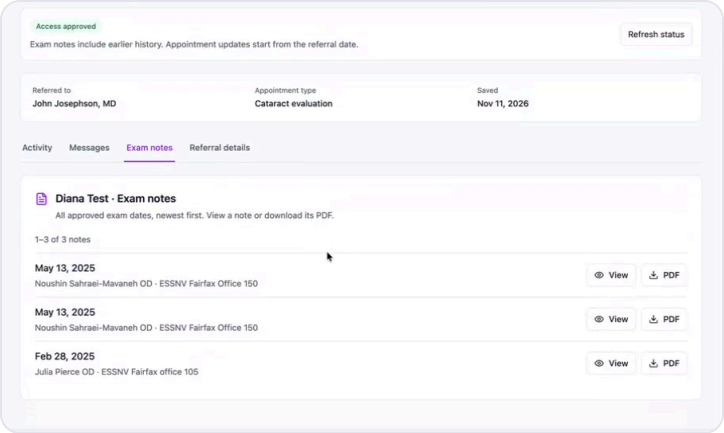
Messages and exam notes

Open a referral from Past Referrals. The tabs on its page keep everything about that patient together.



Messages

Ask the receiving team a question or share an update about the referral. Type in the box at the bottom and select the arrow to send. The receiving provider gets a notification and can reply here, so the conversation stays with this referral.



Exam notes

Once access is approved, exam notes from the receiving practice's EMR are listed here, newest first, so you can follow the patient's progress after they are seen. Select **View** to read a note on screen, or **PDF** to download it.

The viewer lets you jump between sections and move between notes.

Also on the referral page

Activity. Appointment status and any recorded patient returns.

Referral details. The information you submitted.

Refresh status. Checks for the latest approval and appointment status.

Record patient return. Notes when the patient is back in your care.

Questions? Contact mac@getvisionairy.com.