SmartForms referrals

HealthLink SmartForms are used to electronically refer patients to providers and services. Zedmed v35.10.2 and later can prepopulate SmartForms with patient and referrer information, and include attachments and notes that are saved in Zedmed. This integration means hospital and healthcare organisations that require the SmartForm format are supported.

QuickStart Guide (3-pages)

Considerations

- To use SmartForms for GP and specialist referrals, use an SR SmartForm
- Zedmed's SmartForms integration must be installed before it can be used. To learn more, see theSmartForms setup guide.
- You can view a list of the organisations and hospitals available, see the HealthLink SmartForms provider list.
- Referral recipients need HealthLink and a compatible PMS system to receive SmartForm referrals.
- Incoming SmartForm referrals are delivered to Zedmed's Results Inbox and require linking to the practitioner

Opening Healthlink SmartForms

This section shows the 3 ways SmartForms can be opened in Zedmed.

From the Referrals Module:

1. Start an encounter with the patient.
2. Select **Referrals** from the **Current Encounter** menu.
3. Select the **Pathology**, **Radiology** or **Referral letter** tab.
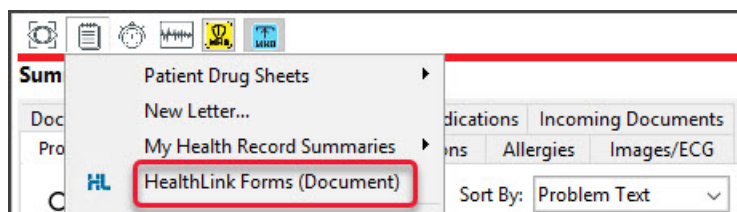4. Select the **HealthLink Forms (Referral)** button.

   HealthLink SmartForms will open in your web browser.
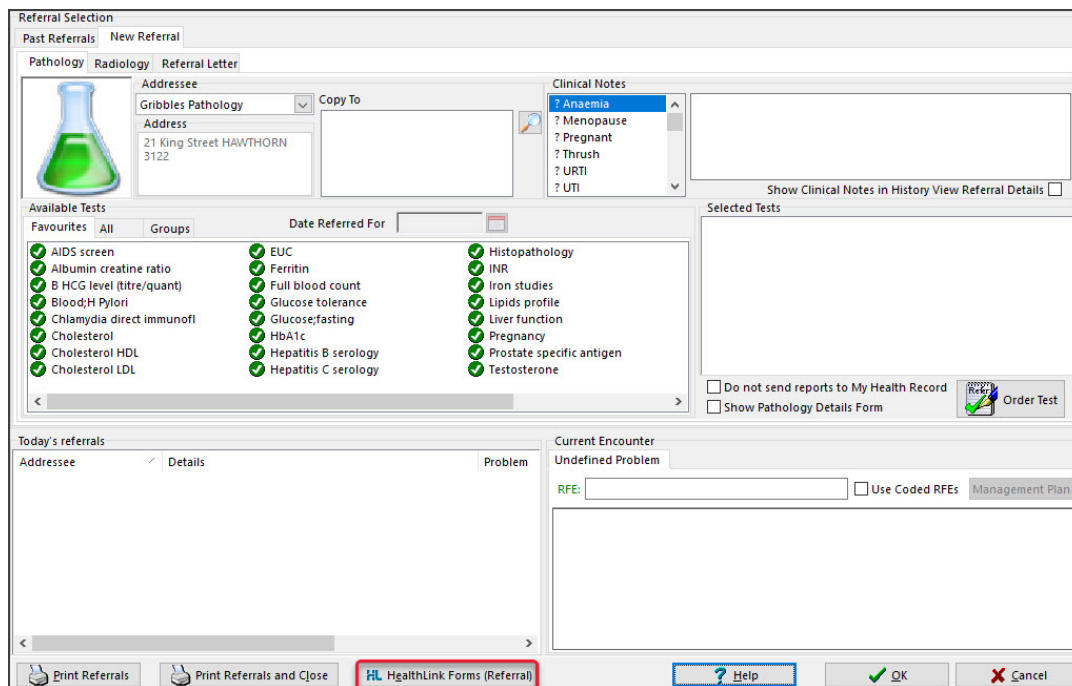
From Quick Documents:

1. Open the patient's record in Clinical.
2. Select the **Quick Documents** icon above **Summary Views**.
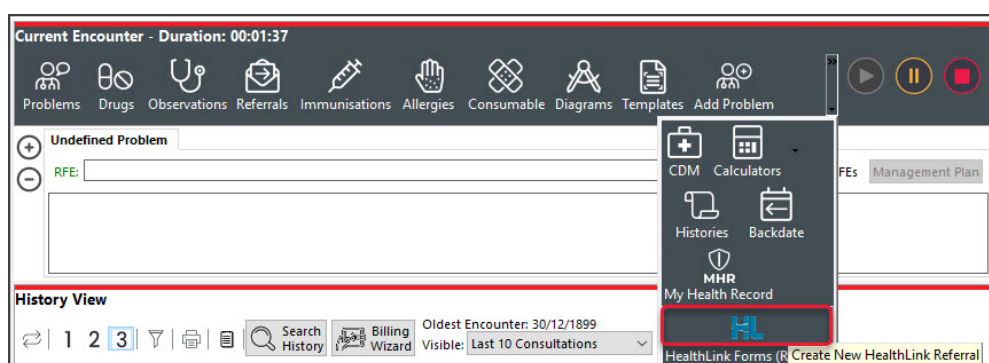3. Select **HealthLink Forms (Document)**.

   HealthLink SmartForms will open in your web browser.

From the Current Encounter menu:

1. Open the patient's record in Clinical.
2. Start an encounter with the patient.
3. Select **HealthLink Forms** (Referral) from the **Current Encounter** menu.

   HealthLink SmartForms will open in your web browser.

Creating a SmartForm

HealthLink SmartForms uses a standardised format to record, send and store the document's information.

Step 1 - Selecting the organisationand service

1. Select the organisation to display the services it provides.
2. Select the service you require.
3. Select **Continue** to open the form for that service.

   ### Navigation

   Use the browser's back arrow if you want to go back to the previous screen, for example, to the services selection or hospital. If you do not Submit or Park (save) a Smart form, you can close the browser and the form will not be saved.
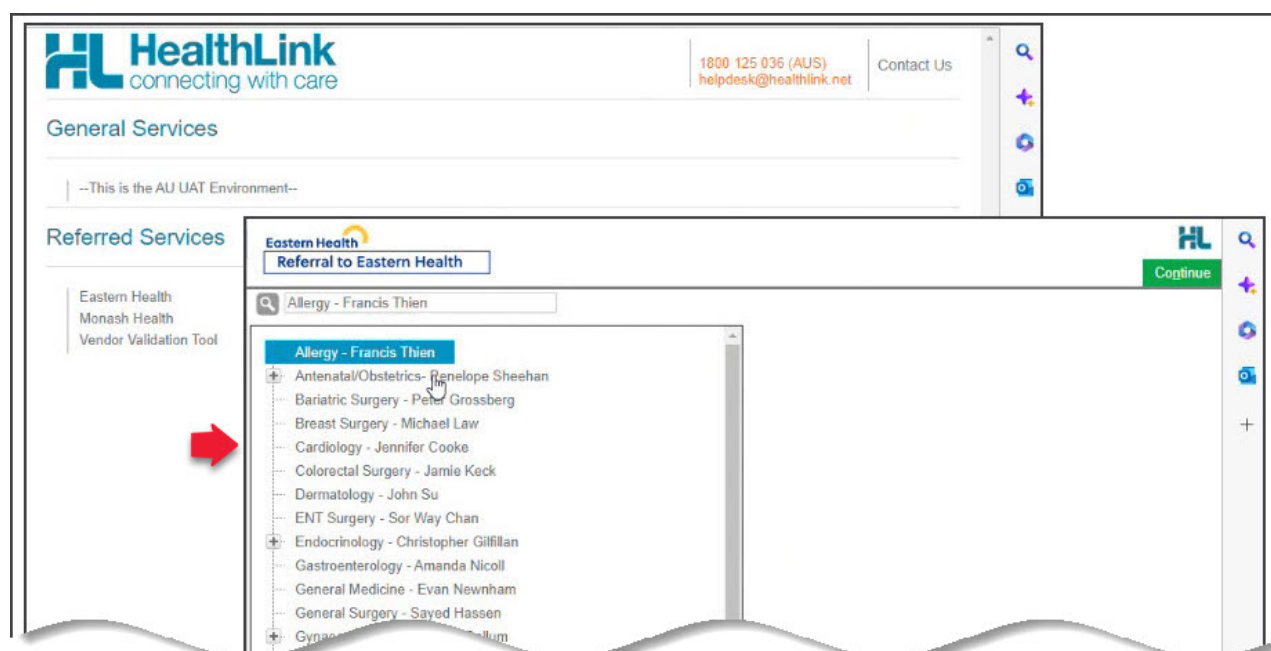
Step 2 - fill in the form for the service

Go through each tab on the left and fill in the information required. Zedmed will prefill what fields it can with the patient and referrer information that is available in Zedmed. The **Requested Information** tab will be different for each service, and the other 5 tabs will remain the same.

Mandatory fields have a red star * beside them, and a red warning icon will appear on a tab with an empty mandatory field. If you are unsure what fields have been missed, selecting **Submit** will display a list of incomplete fields.

The following actions are available when filling in a form:

- The **Park** option saves the form so you can continue at a later time.
  - It will be saved in Zedmed's **Summary Views** > **Referrals** or **Documents** tab with the (**D**) draft status.
  - If you Park a form, you will need to reselect any attachments.

- **Editing the information,** which is useful for changing the prepopulated information.
  - See the Modifying data section below to learn more.

- **Adding attachments** like PDFs or JPG using the **Attachment/Reports** page.
  - See the Adding Attachments section below to learn more.
  - Select the TV icon to preview the file. If it is a PDF, the PDF will download so you can review it.

- The **Browse for More Medications** and **Browse for Consultation Notes** buttons allow you to open another window and change the time frame and search for more items. Use the **Attach** button to add selected items to the form.

Step 3 - Select Submit to send the form

After you **Submit** a referral, it will be saved in the **Summary Views** > **Referrals** tab under HealthLink. Documents will be saved in the **Documents** tab.

Important: After you select **Submit**, the form will display. Use the **Print** button to print the completed document for the patient.

Print

Form sent on 23/02/2023 10:57 AEDT

Allergy - Francis Thien

Eastern Health
Referral to Eastern Health

Patient: Emma Black, 40yrs, F, DOB 13/12/1982, PH: 0400001111
Residential address: 30 3rd Street, ELLEN GROVE, QLD 4078
Postal address: same as residential address
Referred by: Phillip Davis, Branch 1, Prov. No. 8003619900026805, HPI-O 8003628233367349, PH 01 9284 3300, FAX 09 111223333
Referral date: 23/02/2023 10:57 AEDT

Clinical Referral Information	
Referral Date:	23/02/2023
Referral Continuation:	New
Referral Period:	12 months
Interpreter Required:	Yes
Preferred Language:	English
Additional Needs / Reasonable Adjustments Required:	No
Does the patient have a carer / support person?	No
Is the patient appropriately equipped and enabled for Telehealth (video) consultation?	No
Urgency:	Routine: Greater than 30 days
Referral Purpose:	Establish a diagnosis
Referral Details:	
test	

Medications, Allergies, Alerts - No medications, allergies and alerts specified

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The Summary Views will show the status of the SmartForm. After 30-60 minutes, the status will show P-Processed if the service provider has SmartForm confirmations running. You can also call to confirm. If the SmartForm is not accepted, you will need to recreate and resubmit it. To learn more, see the Summary Views section.

Modifying clinical data

Any of the information auto-populated by Zedmed can be edited or deleted.

- To modify an entry, select it and the information will open an editable field with a **Save** button.
- To remove an entry, select the cross in the far right column and confirm that you want to remove that row.

In the example below, the Medications in the patient's Summary Views have been added to the SmartForm. Those medications are shown in the editable field, and some or all of the medications can be deleted and the changes saved.

Adding attachments

Files in the Summary View's **Attachments** and **Images** tabs can be attached to the SmartForm's **Attachments/Reports** tab. You can also attach local files from your computer using the **Browse for Local File** button. If you **Park** a form, you will need to reselect any attachments.

To attach a file from Zedmed:

1. Select the SmartForms **Attachment/Reports** tab.
2. Tick the box next to the name of the file you want to attach.

Select the TV icon to preview the file. PDFs will download and other file types will open a preview window.

To locate and add files from a longer time frame:

1. Select the SmartForms **Attachment/Reports** tab.
2. Select the **Browse for Patient Document** button.

   The **Attach Files** screen will open and show all attachable files in Zedmed.
3. Change the date range to and select **Search** to display the file available.
4. Select the tick box next to each file you want to add.
5. Select **Attach**.

   The files will be added and appear in the **Attachment/Reports** tab with a tick.

SmartForms Summary Views

Any HealthLink Smartform created for a patient can be viewed and interacted with in the Summary Views section of the patient's record. If the form does not appear, select the **Refresh** button above the **Event History**.

SmartForm locations

- SmartForm referrals are saved under the **HealthLink** header in the **Summary Views**>**Referrals** tab.
- SmartForm referrals and documents are saved under the **HealthLink** header in the **Summary Views**>**Documents** tab.
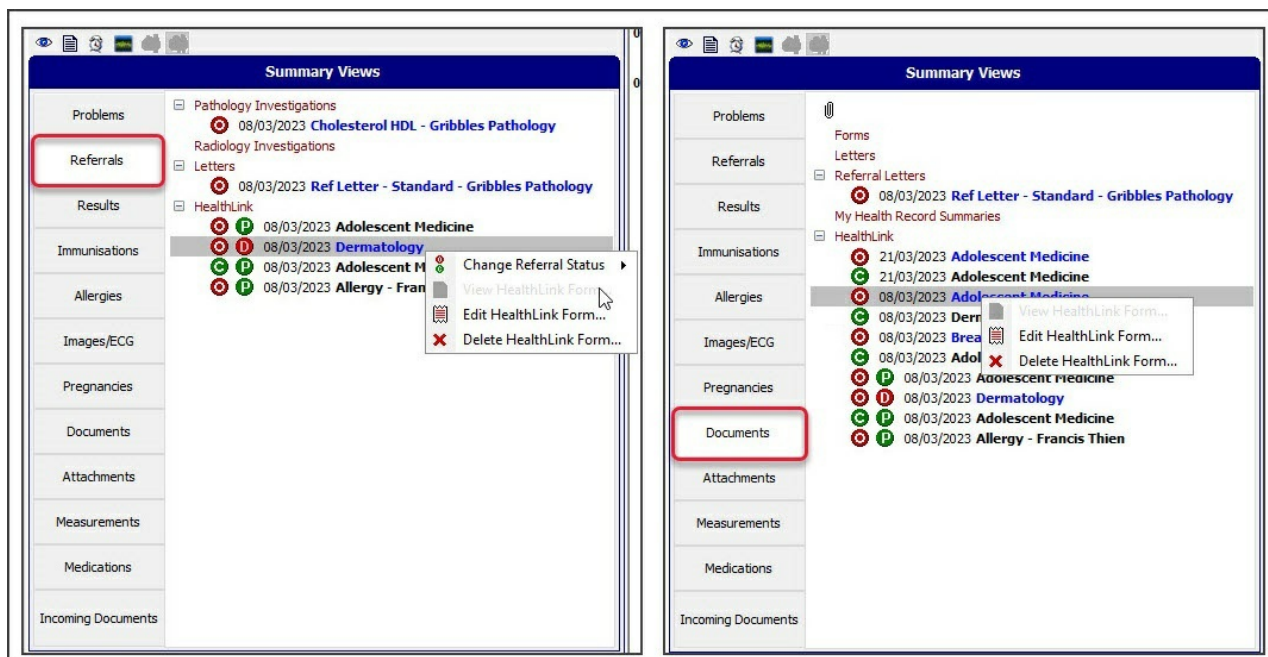
SmartForm right-click options

Zedmed options - for Referrals

When you right-click a Referral, you can change the Zedmed Status to **(O) Open** (default when created) or **(C) Closed** (what you change it to when the results have been received). This manual setting helps keep track of what Referrals need to be followed up on.

HealthLink options - for Referrals and Documents:

- **(D) Draft -** can Edit and Delete.
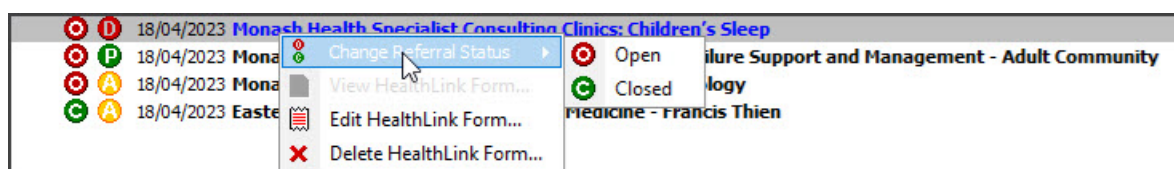
- **(A) Awaiting acknowledgment -** can View/Print the form.
- **(P) Processed -** can View/Print the form.
- **(P-crossed out)Failed -** can View/Print the form.
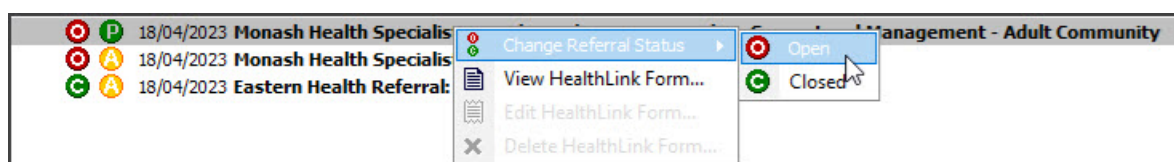

SmartForm status icons

The status icons are important as they tell you the status of a SmartForm.

Left-column status icons (as with normal documents) for referrals only:

- **(O-red) Open** - referral has not been actioned or discussed with the patient.
- **(C-green) Closed** - referral has been discussed with the patient and no action is required.

Right-column HealthLink status icons for referrals and documents:

- **(D-red) Draft -** the SmartForm has been parked (**saved locally).** You can complete and submit at a later time.

  Draft descriptions will also have **blue text** instead of black.
- **(A-yellow) Awaiting acknowledgment** - waiting for the service provider to accept or reject the SmartForm.
- **(P-green) Processed** - The destination (e.g. hospital) received the SmartForm.
- **(P-crossed out) Failed** - The destination received but **rejected** the SmartForm. You will need to recreate it.
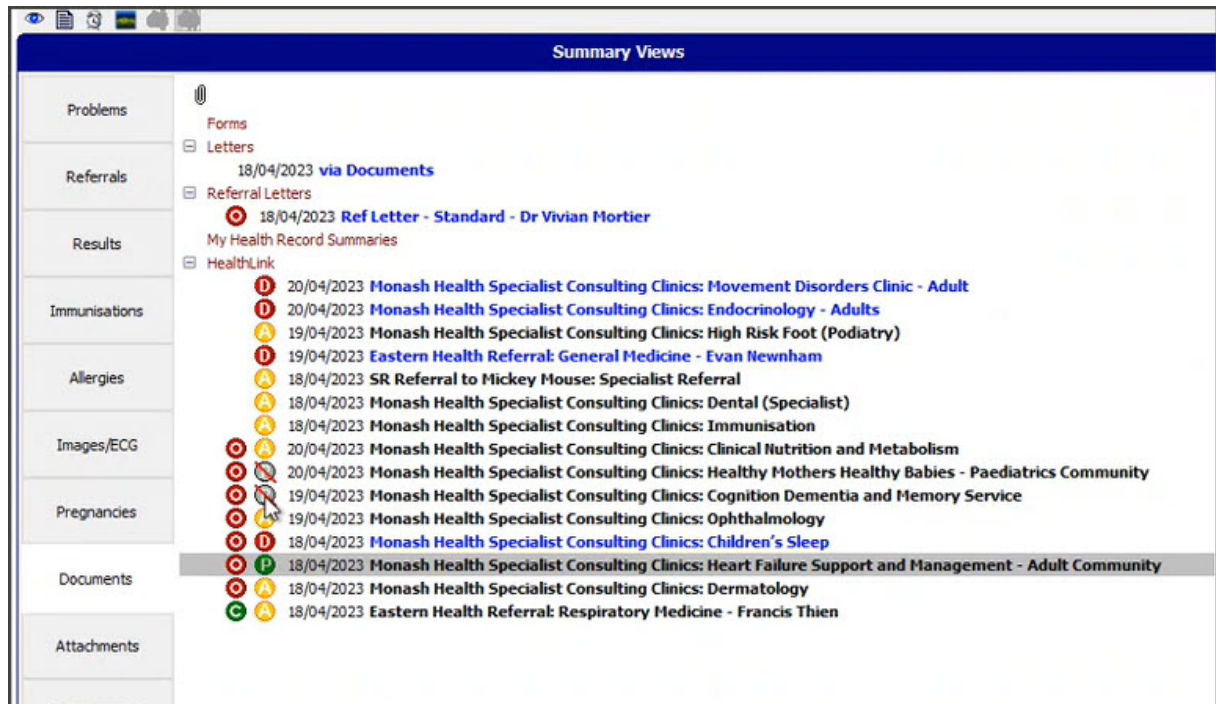
Zedmed SmartForms video

Your browser does not support HTML5 video.