

SmartForm & SR referrals

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Zedmed supports HealthLink SmartForms for electronic patient referrals to participating healthcare providers. The SR Specialists & Referrals integration adds their Specialists Directory to the supported recipients. Requires Zedmed v35.10.2 and later.

SmartForms referrals

Zedmed can prepopulate SmartForms with patient and referrer information and include the attachments and notes saved in Zedmed. This means hospitals and healthcare organisations that require the SmartForm format are supported.

Quickstart guide

Considerations

- Zedmed uses SmartForms for RTWSA
- To use SmartForms for GP and specialist referrals, use an SR SmartForm
- 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.

Referral Selection					
Past Referrals Ne	w Referral				
Pathology Radio	logy Referral Letter				
	Addressee		Clinical Notes		
	Gribbles Pathology	Сору То	? Anaemia		
	Address		? Menopause		
	21 King Street HAWTHORN		? Pregnant		
	3122		? Thrush		
			2 UTI V	Show Clinical Notes in History V	iew Peferral Details
Available Tests				Selected Tests	
Favourites All	Groups Date	Referred For			
Chlamydia dir Cholesterol Cholesterol H Cholesterol LI	ect immunofi Ø Giucosi Ø HbA1c DL Ø Hepatit DL Ø Hepatit	stasting Liver fun is B serology Prostate is C serology Testoste	ction cy specific antigen rone >	Do not send reports to My Health Recor	d Rect Order Test
To day's referrals			Current Encounter		
Addressee	/ Details	Problem	Undefined Problem		
	B cturis	. Toble			
			RFE		RFES Management Plan
<		,			
Print Referral	s Print Referrals and CI	ose HL HealthLink Forms (Referral)		? <u>Н</u> еlp ✓ <u>О</u> К	X Cancel

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.

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Sum		Patient Drug Sheets	۲				
Doc		New Letter		dicat	ions	Incom	ing Documents
Pro		My Health Record Summaries	•	ins	All	ergies	Images/ECG
с	HL	HealthLink Forms (Document)		Sor	rt By:	Proble	m Text 🗸 🗸

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.

Current Encounter - Duration: 00:01:37	
Problems Drugs Observations Referrals Immunisations Allergies Consumable Diagrams Ter	mplates Add Problem
Undefined Problem P RFE:	CDM Calculators Histories Backdate
History View	My Health Record
Image: Construction of the second	HealthLink Forms (R Create New HealthLink Referral

Creating a SmartForm

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

Step 1 - Selecting the organisation and 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 to return to the previous screen. 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 required information. 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 five 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.

Health	Endocrinolo	gy - Adults										
Requested Information A Endocrinology - Adults	Form has been auto-saved.											
Attachments / Reports 2 reports selected No files attached	To I incl	telp recipients asse uding the generic na	ss the patient's medic ame, strength, brand i	ations, please	provide the	e medical nd form. Y	ion details in ti ou can update	e Details column fields by clicking on it.				
Medications, Allergies, Alerts 3 long term medications specified	Current Medi	cations 🖪										
1 medication specified 1 medical warning specified	Date -		letails	Dose	Units		Instruc	ions 🐣				
	19/04/2023	FAB Iron + Vitam	in B Complex			Please	enter the search	h criteria				
Agdical, Social and Family History Iedical history specified	18/04/2023	Cenovis Mena B	a B Tablets			Date fr	om 08/11/202	22 💼 Date to	08/05/2023		Searc	h
	18/04/2023	Berocca Focus E	ffervescent tablets									Attach Cancel
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Patient Information	Date -		letails	Dose	Units		19/04/2023	Tablets	lex			CAP PRN AFTER MEALS MANE
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Referrer Information	Allergies and	Alerts										
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2121331W	✓ 18/04/2023 Dye											
2121331W	18/04	/2023 Dye										

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, and documents will be saved in the **Documents** tab.

Eastern Health	Allergy - Francis Thien		Submit Preview Park Help
Requested Information A Allergy - Francis Thien	Patient Information Date of birth* 13/12/1982 III Medicare/DVA Eligible*	IHI 8003602348418370	í e
Attachments / Reports No reports selected No files attached	Yes No Medicare number 4950152331	Medicare expiry	G
Medications, Allergies, Alerts No long term medications specified No medications specified No medical warnings specified	DVA number QX712347 Private health fund name	Pension number Patient membership number	
Medical, Social and Family History No medical history specified	Name* Emma Black Gender*	Patient's indigenous status*	- 1
Patient Information A Emma Black 8003602348418370 13/12/1982	Residential Address 30 3rd Street, ELLEN GROVE, OL	D, 4078	- 1
Referrer Information Philip Davis 8003619900026805	Postal Address Same as residential Yes	D. 4076	
	Contact Details (Select preferred pho	one contact)	
	Work* Mobile* Email	Home" Other*	
	Next of Kin]	

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			
		Referral to East	ern Health
Patient: Emma Black, 40yrs, F, DOB 13/12/1982, PH: 0	400001111		
Residential address: 30 3rd Street, ELLEN GROVE, Q	LD 4078		
Postal address: same as residential address			
Referred by: Phillip Davis, Branch 1, Prov. No. 8003619 FAX 09 111223333	900026805, HPI-O 80036	28233367349, PH (01 9284 3300,
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 3	0 days	
Referral Purpose:	Establish a diagnosis		
Referral Details:			

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.

Monash Health	Breast Surge	ry						
Requested Information Breast Surgery	To h	elp recipients assess the pa ding the generic name, stre	tient's medications, pl ingth, brand name (wh	ease provide the ere relevant) an	e medication details in the Details col d form. You can update fields by clici	umn king on it.		
Attachments / Reports / reports selected lo files attached	Current Medic	ations						
	Date -	Details	Dos	e Units	Instructions	4		
Medications, Allergies,	30/03/2023	medication blah blah						
Alerts long term medications specified to medications specified medical warning specified	30/03/2023	Ascorbic acid 500mg - Bio Calcium 100mg - Cyanoco 10mcg - Folic acid 400mc Save	tin 150mcg -		TAKE 1 BID BEFORE MEALS			
Medical, Social and Family	Past Relevant	Medications	se for More Medications	-				
Aedical history specified	Date -	Details	Dose	Units	Instructions	4		
	No records fo	ound.						
atient Information	Allergies and	Alerts						
uke Kelley 950177611 1	D Dat	e •	Description		Comments			
0/03/13/00	30/03	2023 Grass pollen						
Referrer Information	Medication Co	omments						

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.

	Kelley, Luke						History View	N						
-			🗑 🔎 Search 🥶	Billing Wizard	Oldest En Visible: Li	counter: 29/03/20 ast 10 Consultatio	ns V C) Include MHR							
Address:	142 Hung Cr, PARKWOOD 4214	20/02/2022 (Thu) 11-56am with D	r Phillip Davie at MED for	Am 404										
DOB: Age:	8/09/1960 Home: 62 years Work:	HealthLink Form AU	× +											
Medicare No: File No:	49501776111 Mobile: 0- 38 Occupation:	e ← → C ▲ Not secu	ure 10.126.126.92:50	88/for	m-au/re	ferralFormFra	mes.jsp:jsessionid=38C0156A2C5D2	A6AAE4B124BEED00FD1?forr	nScopeld=MH-	9229&_fsk=	-1765			
Hosp UR No: MHR Status: Referrer:	Consent to Upload	Monash Health	Breast Surgery								Submit			
• • •	Summary Views	Requested Information Breast Surgery	Server a Form ha	s beer	n auto-s	saved.								
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Referrals	Encounter Linked		Attach file from Computer supports files that end in types: doc, docx, gif, htm, html, jpeg, jpg, pdf, rtf, tif, tht Caution: larger attachments may take significant time to preview											
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		Medical, Social and Family History	30/03/2023	Do	Dutent	301091202	0 En Date to 51/03/20		Attach	Cancel				
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		Patient Information	30/03/2023	Im		30/03/2023	Attachments		pdf	Cancel rype Size idefine 1 KB if 983 KB 1 KB 1 KB eg 4 KB if 1 12 KB if 983 KB if 112 KB if 913 KB				
Documents		49501776111 08/09/1960	30/03/2023	Inc		30/03/2023	Ref Letter - Standard		rtf	1 KB				
		Referrer Information				30/03/2023	Documents		txt	1 KB				
Attachments		Phillip Davis 2121331W				30/03/2023	Scan_REsultsReprots_Incoming Documents		jpeg	46 KB				
Measurements						30/03/2023	IncDoc_IncDoc		pdf	112 KB				
						30/03/2023	ImagesECG		pdf	983 KB				
Medications						30/03/2023	IncomingDoc_Result		pdf	112 KB				
Incoming Document	ts <													

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.

0 D 18/04/2023 Mona	ch H	ealth Specialist Consulting	Clinic	cs: Childre	n's Sleep
O P 18/04/2023 Mona	8	Change Peferral Status 🔹 🕨	0	Open	ilure Support and Management - Adult Community
🧿 🙆 18/04/2023 Mona		View HealthLink Form	Θ	Closed	logy
🕒 () 18/04/2023 Easte		Edit HealthLink Form	mea	icine - Fra	ncis Thien
	×	Delete HealthLink Form			

- (A) Awaiting acknowledgment can View/Print the form.
- (P) Processed can View/Print the form.
- (P-crossed out)Failed can View/Print the form.

18/04/2023 Monash Health Specialis	00	Change Referral Status 🔹 🕨	Ó	Open Open
 18/04/2023 Foliasi Health Specials 18/04/2023 Eastern Health Referral: 		View HealthLink Form Edit HealthLink Form Delete HealthLink Form	Θ	Closed

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.

Problems	0 Forms
Referrals	Eletters 18/04/2023 via Documents Referral Letters
Results	18/04/2023 Ref Letter - Standard - Dr Vivian Mortier My Health Record Summaries HealthLink HealthLink
Immunisations	20/04/2023 Monash Health Specialist Consulting Clinics: Movement Disorders Clinic - Adults 20/04/2023 Monash Health Specialist Consulting Clinics: Endocrinology - Adults 319/04/2023 Monash Health Specialist Consulting Clinics: High Risk Foot (Podiatry)
Allergies	19/04/2023 Eastern Health Referral: General Hedicine - Evan Newnham 18/04/2023 SR Referral to Mickey Mouse: Specialist Referral 18/04/2023 Monash Health Specialist Consulting Clinics: Dental (Specialist)
Images/ECG	18/04/2023 Monash Health Specialist Consulting Clinics: Immunisation 10 (2014) 20/04/2023 Monash Health Specialist Consulting Clinics: Clinical Nutrition and Metabolism No 2004/2023 Monash Health Specialist Consulting Clinics: Healthy Mothers Healthy Babies - Paediatrics Community
Pregnancies	19/04/2023 Monash Health Specialist Consulting Clinics: Cognition Dementia and Memory Service 19/04/2023 Monash Health Specialist Consulting Clinics: Ophthalmology 10 18/04/2023 Monash Health Specialist Consulting Clinics: Clinices Select
Documents	18/04/2023 Monash Health Specialist Consulting Clinics: Heart Failure Support and Management - Adult Community 3 18/04/2023 Monash Health Specialist Consulting Clinics: Dermatology 49/04/203 Health Specialist Consulting Clinics: Dermatology
Attachments	V V 10/04/2022 Eastern nearul Kelerrat Kespiratory Hedicine - Francis Thien

Zedmed SmartForms video

Your browser does not support HTML5 video.

S&R SmartForm referrals

SR Specialists & Referrals is a HealthLink SmartForms integration that provides access to an online version of the Medical Specialists Directory for NSW, ACT, VIC and TAS. This directory is ideal for finding practices, specialists, GPs and Allied Health providers within SmartForms, and supports both printed and e-referrals.

Quickstart guide

Considerations

- For hospitals, certificates, and states not covered by SR, refer to the standard SmartForms guide.
- If you already use Zedmed's SmartForms integration, there are no additional configurations or costs.
- 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 an SR SmartForm

There are three ways to open HealthLink SmartForms in Zedmed.

From the Referrals module:

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

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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 the HealthLink Forms icon in the Current Encounter menu.

Curr	ent En	counter	- Duration:	00:01:37									
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Creating an SR SmartForm

When HealthLink SmartForms opens, SR Specialists & Referrals is displayed at the top.

Step 1 - Find a practitioner or practice in the SR directory

1. Select **Specialists & Referrals** from the Smartforms homepage.

L HealthLink connecting with care		1800 125 036 (AUS) helpdesk@healthlink.net
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The SR Specialists & Referrals page will open.

2. Search for the SR practitioner or practice.

Use the search fields to set the criteria then select Search Specialists.

The options:

- Enter Specialist Name opens a drop-down list of specialists and practices that match the name you type.
- Select a Category opens a drop-down list of specialties to choose from. You must use one of the options provided.
- Enter Suburb or Telehealth opens a drop-down list of locations that match what you type, including 'telehealth'.

• Enter Keyword - opens a drop-down list of common options that match what you type. You can enter any word.

Search the Medical	Enter Specialist Name		Welcome to SR
Specialists Directory	jones	Ψ	+ Simple referral form saving you time
	Select a Category		+ Live now in NSW, ACT, VIC, TAS, SA, WA
I Specialists	Cardiology Related	× -	 One seamless process for all electronic and manual (fax, hand to patient) referrals
Medica	Enter Suburb or Telebealth	Distance	+ Many specialist clinics are busy, so ask your
	Melbourne VIC	10 km	contacted within 3 days
			For queries or training please ph 1800 147 047
2022	Enter Keyword	*	sr-support@specialistsreferrals.com.au
STOR			
	Q SEARCH SPECIALI	STS	

Next steps: Each specialist and practice has either a **Manual Refer** or **E-Refer** button, which will open SmartForms. You can also select **View Profile** to open the specialist or practice profile and learn more about them. If you select practice, you can also view and select a specific practitioner.

3. Open a SmartForm for one of the practitioners or practices shown in the search results.

The selection is made by clicking the MANUAL REFER or E-REFER button.

- E-Refer when the SmartForm is ready, select Submit to send it using HealthLink's secure messaging.
- Manual refer when the SmartForm is ready, select **Print** for hand delivery or faxing. Attachments are not supported and will need to be printed separately.

The search filter is also available on the results screen. You can change the criteria to refine or change the results shown.

Email Patient will send the practitioner or practice profile to the patient from the SR Specialists and Referrals mail server.

After you select the MANUAL REFER or E-REFER button, you will be shown the available locations. 4. Select the location to send the referral to.

For the most up-to-date documentation version, visit https://help.zedmed.com.au/help

Main Search / Cardiology Rel	ated, Melbourne VIC			<u>Back</u>
	Results for: Ca	ardiology Related, Melbo	ourne VIC	
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5. Optional step - View Profile

Specialists and practices have a profile page accessible via the **View Profile** button. The profile provides information and lists the services available. Practices also include a list of specialists at the clinic with links to their SR profiles.

You can:

• Select Add to frequently used to bookmark the practitioner or practice on the SmartForms starting (Home) page.

- Email the profile to a patient by typing in their email address.
- Print the profile out.
- Use the E-REFER or MANUAL REFER button to open a SmartForm.



When you select the location, the SR Specialists & Referrals SmartForm will open. The format is used for **all** SR SmartForms.

Navigation

- Use the tabs on the left to complete each page.
- A SmartForm for an E-REFER will have a green **Submit** button.
- A SmartForm for a MANUAL REFER will have a green **Print** button.

Cardiothoracic Surgeon

- The **Park** option will save a draft of the SmartForm in the patient's **Summary Views** (Referrals or Documents tab)
- Use the browser's back arrow to go back to the previous screen.

SR Specialists												H
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Referrer Information Phillip Davis 100231XY												
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Step 2 - Fill in the SmartForm

Go through each tab and enter the information. Zedmed will prefill what fields it can with the patient and referrer information that is available in Zedmed. The selected practitioner or practice will also have their information added to the SmartForm.

Mandatory fields have a red asterisk * beside them, and a red warning icon will appear on a tab with an empty mandatory field. Selecting **Submit** will also display a list of incomplete fields.

- 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 re-select 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.
 - You cannot add attachments for Manual referrals (MANUAL REFER button), these need to be printed separately.
- 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.

Requested information Special is one rear calculoty Form has been auto-saved. Attachments / Reports Form has been auto-saved. No reports selected To help recipients assess the patient's medications, please provide the medication details in the Details column including the generic name, strength, brand name (where relevant) and form. You can update fields by clicking on it. Medications, Allergies, Allers / Warnings Current Medications I No nedications specified Details Medication specified Details Medication history specified Past Relevant Medications I Medication history specified Past Relevant Medications I Patient Information Paper Details Dose Mappy Jones Allergies and Alerts 00231XY Date Description Comments No records found. Referrer Information 100231XY Date Description Patie O Date Description Comments No records found. Clinical Medication Comments Comments	SR Specialists & Referrals	Poterral to One	Heart Cardiolog					Submit	Draviour	Dark	Holp
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Step 3 - Submit or Print the SmartForm

Complete the SmartForm by selecting Print (for a Manual Refer) or Submit (for an E-Refer).

- **Submit** will send the SmartForm referral using HealthLink's secure messaging. You will have an option to print the referral for the patient on the confirmation page.
- Print will send the SmartForm to your printer for hand delivery or faxing.

The printed and submitted referrals are saved in the **Summary Views** > **Referrals** tab under HealthLink. Documents will be saved in the **Documents** tab.

An E-Referral Summary View status will show P-Processed if the service provider has SmartForm confirmations running. You can also call to confirm (allow 30-60 minutes). If the SmartForm is not accepted, you will need to recreate and resubmit it.

Important: When the form has been submitted, it shows as Acknowledged, which means HealthLink saved the referral and will send it. In Zedmed, the SmartForm referral will appear in the Patient's Summary Views with the status Ack - indicating HealthLink will send it - not that it has been seen by the recipient.

Adding attachments (e-referrals only)

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.

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Medications, Allergies,		Date -	Name	Comments	Туре	Size					
No long term medications specified No medications specified		10/08/2023	Letter - Test Letter (Result View)		pdf						
No medical warnings specified		10/08/2023	Letter - Test Letter (Enhanced View)		pdf						
Medical, Social and Family History No medical history specified	0	14/07/2023	Letter to Dr Vivian Mortier		rtf	1 KB					
Patient Information A Happy Jones 8003608333380962 04/12/1964											
Referrer Information Phillip Davis 100231XY											

SmartForms Summary Views

Any SR 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**.

All SmartForms submitted using the SR directory will have the prefix SR in Summary Views.

• 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.

D (draft) means the SmartForm has been parked. Right-click and select **Edit HealthLink Form** and open the SmartForm again.



SmartForm status icons

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.

