

SmartForms SR referrals

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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 (3-pages)

Considerations

- For hospitals, certificates, and states not covered by SR, refer to the standard **SmartForms** guide.
- If you are already using 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.

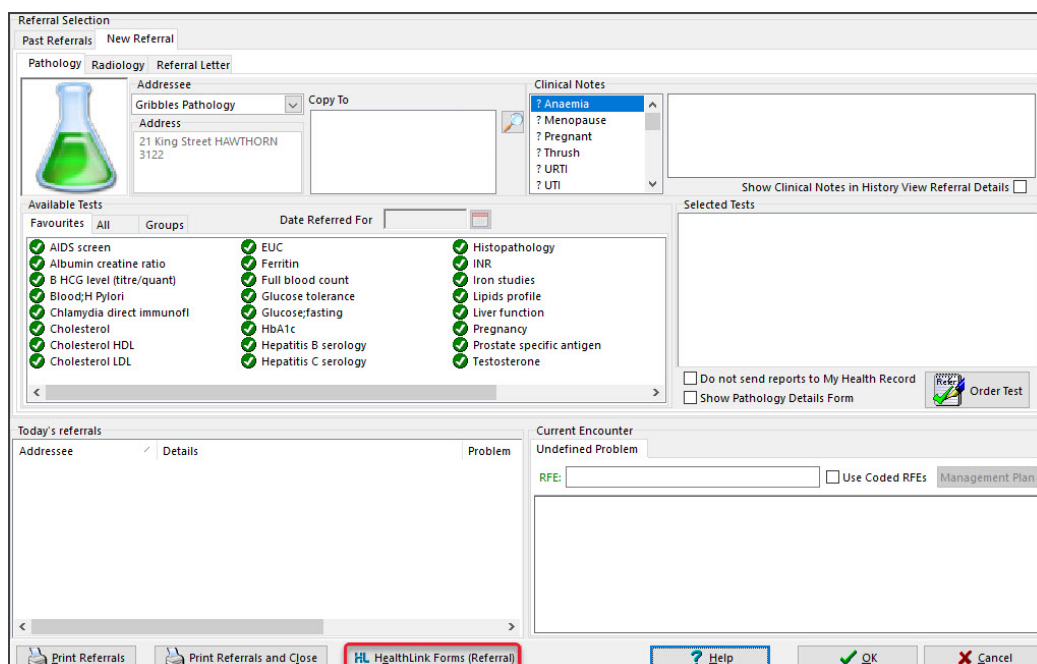
Opening an SR SmartForm

There are 3 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.

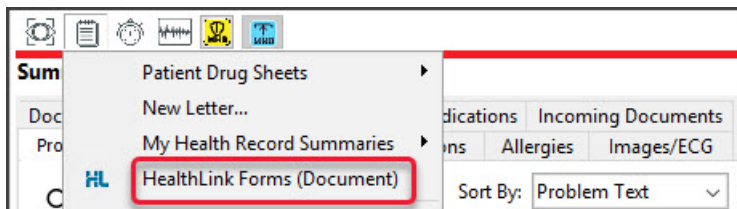
HealthLink SmartForms will open in your web browser.



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)**.

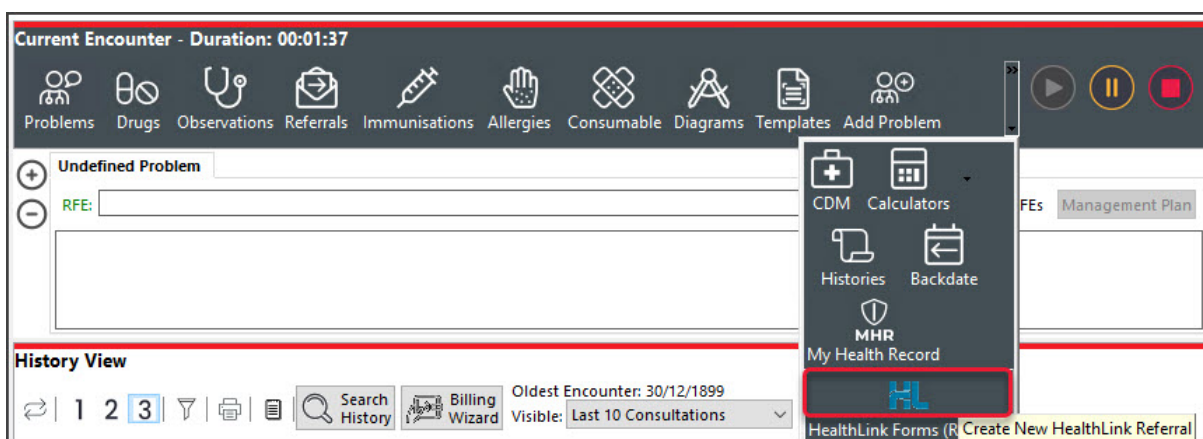
HealthLink SmartForms will open in your web browser.



From the Current Encounter menu:

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

HealthLink SmartForms will open in your web browser.

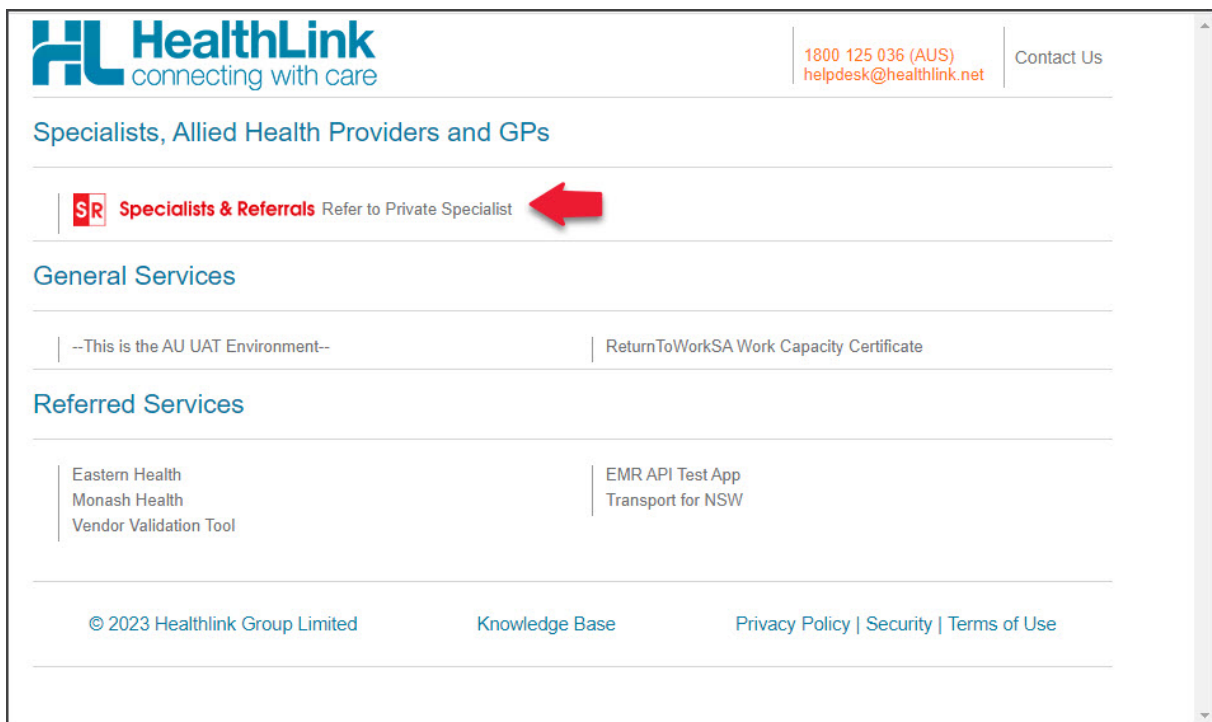


Creating an SR SmartForm

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.



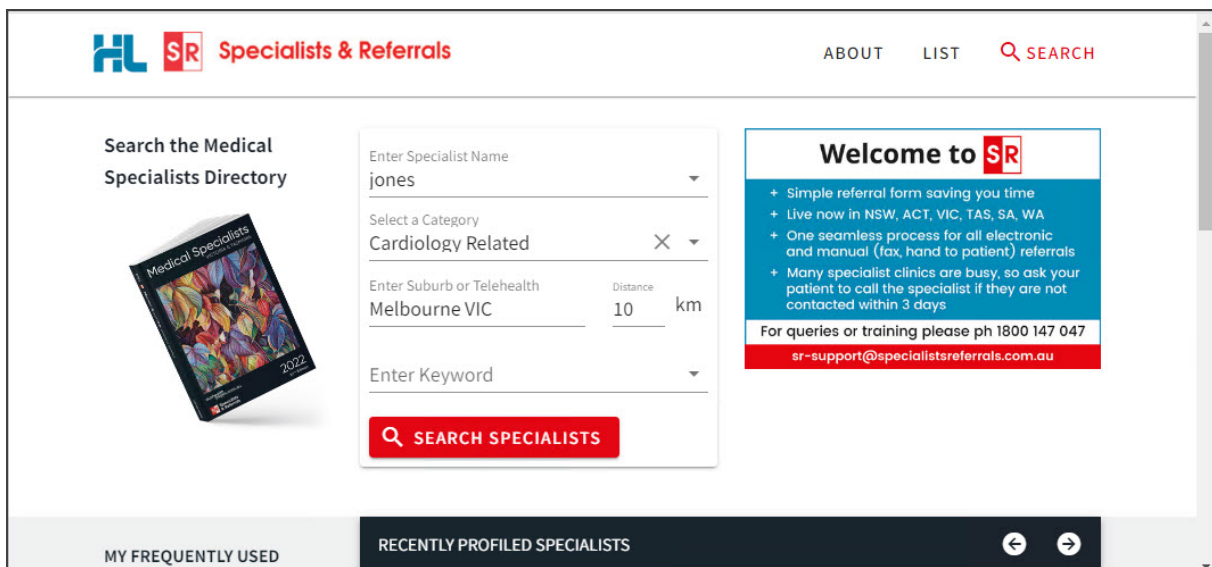
The **SR Specialists & Referrals** page will open.

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.



Next steps: Each specialist and practice has either a **Manual Refer** or **E-Refer** button, which can be used to 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, you select **Submit** to send it using HealthLink's secure messaging.
- **Manual refer** - when the SmartForm is ready, you 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 locations available.

4. Select the location to send the referral to.

The screenshot shows the 'SR Specialists & Referrals' web interface. The top navigation bar includes 'HL SR Specialists & Referrals', 'ABOUT', 'LIST', and 'SEARCH'. The breadcrumb trail indicates 'Main Search / Cardiology Related, Melbourne VIC' with a 'Back' link. The search filters on the left include 'Enter Specialist Name', 'Select a Category' (set to 'Cardiology R...'), 'Enter Suburb or Telehealth Melbourne VIC', 'Distance' (set to 10 km), and 'Enter Keyword'. The main results area is titled 'Results for: Cardiology Related, Melbourne VIC' and shows '205 Results Found'. Two results are visible: 'One Heart Cardiology' and 'John Fawcner Cardiology'. Each result displays the practice name, category (Cardiology), location (Flemington, Niddrie and Coburg respectively), and buttons for 'E-REFER', 'MANUAL REFER', and 'Email Patient'. A 'VIEW PROFILE' button is also present for each result. A sidebar on the left titled 'MY FREQUENTLY USED SPECIALISTS' provides instructions on how to add specialists to a list.

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.

The screenshot displays the One Heart Cardiology website interface. At the top, there are navigation links: [Main Search](#), [Cardiology Related](#), and [One Heart Cardiology](#), along with a [Back](#) link. The main header features the One Heart Cardiology logo and the text "One Heart Cardiology". Below this, the location "Cardiology" is selected, and "Flemington, Niddrie" is shown with a location pin icon. On the right side, there is a red "E-REFER" button and a list of actions: "Add to frequently used", "Email Patient", "Report Clinic Updates", and "Print Patient Handout". A search bar with a magnifying glass icon and the text "Click on image to enlarge" is visible. Below the search bar, there is a small thumbnail image of the One Heart Cardiology logo. The main content area has tabs for "ABOUT", "SERVICES", and "CONTACT INFO". The "ABOUT" tab is active, showing the text "About One Heart Cardiology". The text describes the formation of One Heart Cardiology by four principal cardiologists, their expertise, and their appointments at Royal Melbourne Hospital and Western Health. Below the text, there is a list of the four principal cardiologists: Dr Stacey Peters, Dr Manuja Premaratne, Mr Marco Larobina, and another name partially visible. The website has a clean, professional design with a white background and blue accents.

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.
- 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.

HL SR Specialists & Referrals Referral to One Heart Cardiology Submit Preview Park Help

Requested Information Specialist Referral

Name: One Heart Cardiology
 Fax: 03 9376 7238
 Phone: 03 9374 4884
 Practice: One Heart Cardiology
 Street Address: One Heart Cardiology Flemington: Suite 31, Showgrounds Village Government Pavilion Bldg, 320-380 E
 Suburb: Flemington
 Post Code: 3031

Attachments / Reports
 No reports selected
 No files attached

Medications, Allergies, Alerts / Warnings
 No long term medications specified
 No medications specified
 No medical warnings specified

Medical, Social and Family History
 No medical history specified

Patient Information Happy Jones
8003608333380962
04/12/1964

Referrer Information Phillip Davis
100231XY

Referral Date*: 29/11/2023
 Referral Continuation*: ☒ New ☐ Continuation
 Referral Period*: 12 months
 Feedback Requested*: ☒ Yes ☐ No
 Interpreter Required*: ☐ Yes ☒ No

☐ Urgent

Reason for Patient Referral*: [Browse for Consultation Notes](#)

Additional Information (for example current services)

Measurement Details

Date	Code	Value
	Height	
	Weight	

Date	Code	Value
	BMI	
	BP	

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.

HL SR Specialists & Referrals Referral to One Heart Cardiology

Submit Preview Park Help

Requested Information ⚠️
Specialist Referral

Attachments / Reports
No reports selected
No files attached

Medications, Allergies, Alerts / Warnings
No long term medications specified
No medications specified
No medical warnings specified

Medical, Social and Family History
No medical history specified

Patient Information ⚠️
Happy Jones
8003608333380962
04/12/1964

Referrer Information
Phillip Davis
100231XY

Form has been auto-saved.

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.

Current Medications ⓘ

Date	Details	Dose	Units	Instructions
No records found.				

Past Relevant Medications ⓘ [Browse for More Medications](#)

Date	Details	Dose	Units	Instructions
No records found.				

Allergies and Alerts

<input type="checkbox"/>	Date	Description	Comments
No records found.			

Clinical Medication Comments

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**.

The screenshot shows the 'Referral to One Heart Cardiology' form in the HL SR Specialists & Referrals system. The form is titled 'Referral to One Heart Cardiology' and has buttons for 'Submit', 'Preview', 'Park', and 'Help'. A green message box at the top states 'Form has been auto-saved.' Below this, the 'Attachments / Reports' section shows '1 report selected' and 'No files attached'. The 'Diagnostic Reports / Patient Documents' section lists three attachments: 'Letter - Test Letter (Result View)', 'Letter - Test Letter (Enhanced View)', and 'Letter to Dr Vivian Mortier'. The first two are PDFs and the third is an RTF file. The 'Patient Information' section shows 'Happy Jones' with ID '8003606333380962' and date of birth '04/12/1964'. The 'Referrer Information' section shows 'Phillip Davis' with ID '100231XY'.

	Date	Name	Comments	Type	Size	
<input checked="" type="checkbox"/>	10/08/2023	Letter - Test Letter (Result View)		pdf		
<input type="checkbox"/>	10/08/2023	Letter - Test Letter (Enhanced View)		pdf		
<input type="checkbox"/>	14/07/2023	Letter to Dr Vivian Mortier		rtf	1 KB	

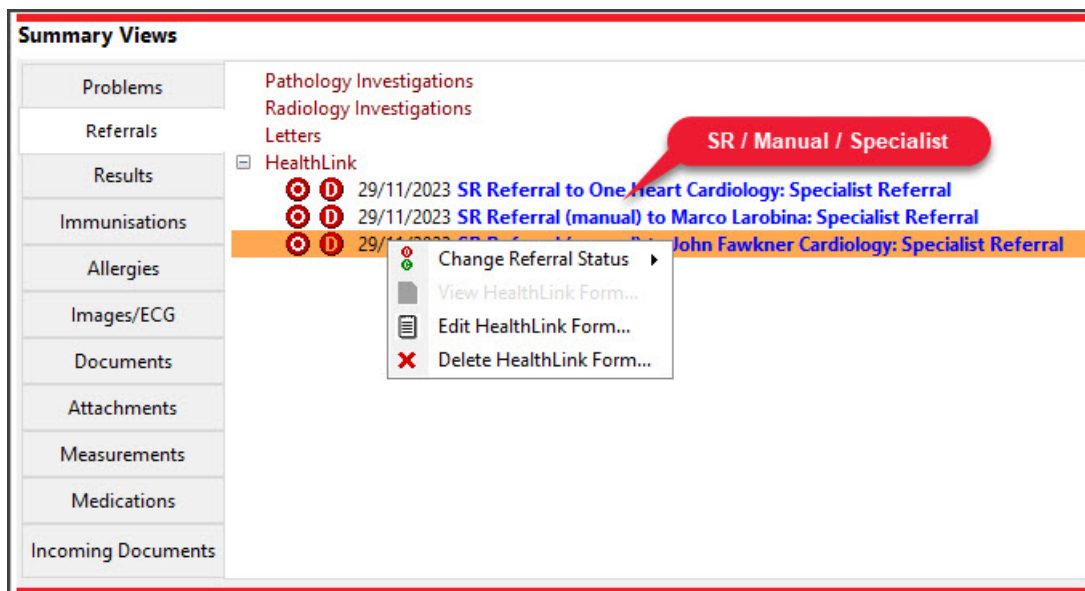
SmartForms Summary Views

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.

