

# SmartForm & SR referrals

Last Modified on 17/02/2025 9:27 am AEDT

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

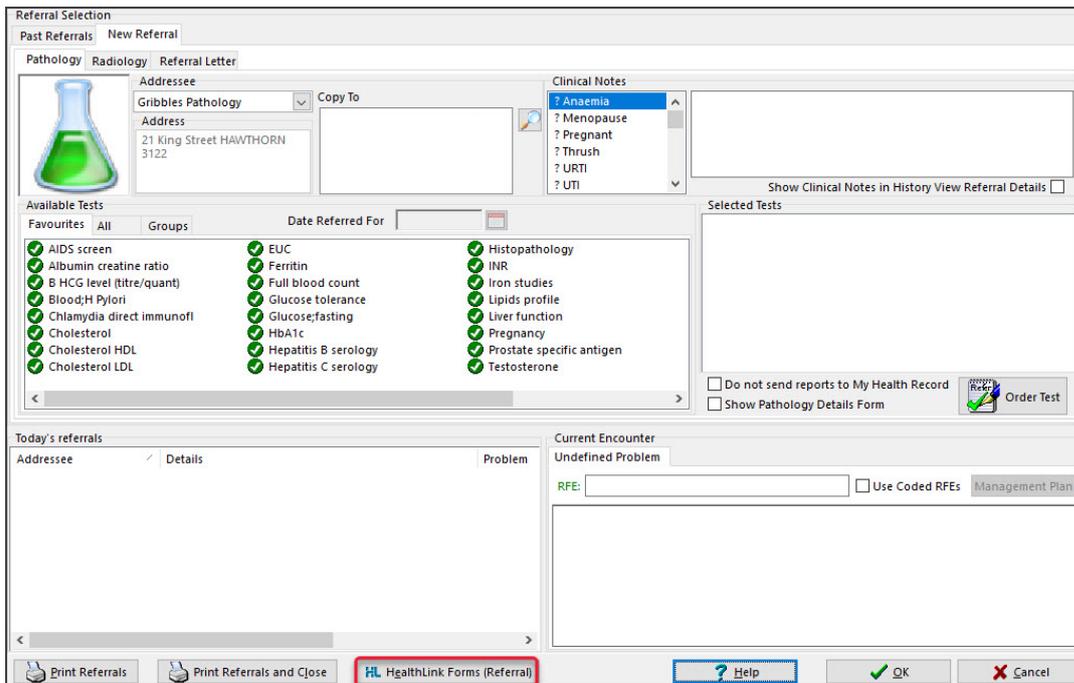
## Opening Healthlink SmartForms

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.

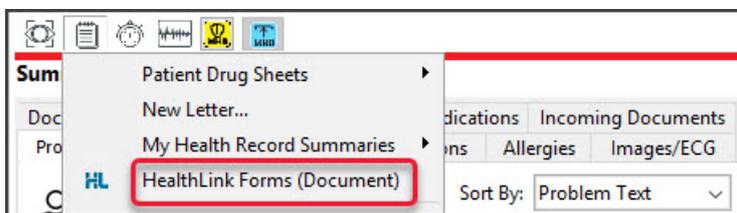
HealthLink SmartForms will open in your web browser.



### 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)**.

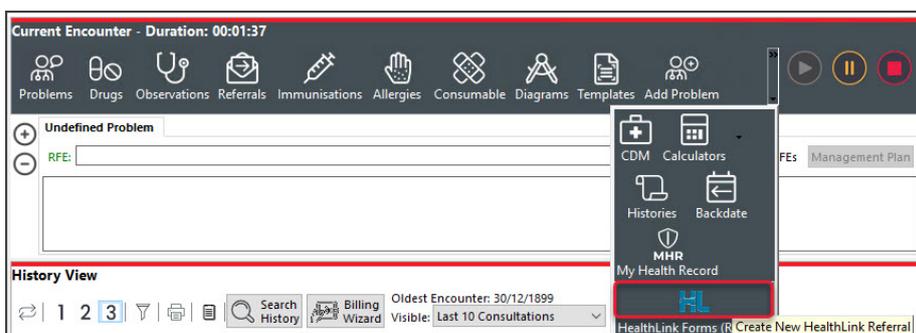
HealthLink SmartForms will open in your web browser.



### 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

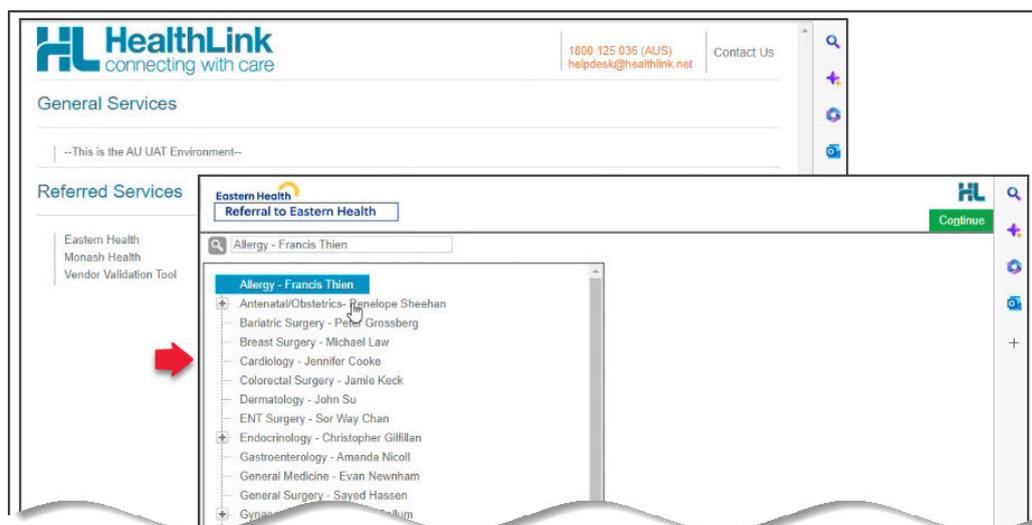
HealthLink SmartForms uses a standardised format to record, send and store the document's information.

## Step 1 - Selecting the 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.

Monash Health  
Endocrinology - Adults

Requested Information  
Endocrinology - Adults  
Form has been auto-saved.

Attachments / Reports  
2 reports selected  
No files attached

Medications, Allergies, Alerts  
3 long term medications specified  
1 medication specified  
1 medical warning specified

Medical, Social and Family History  
Medical history specified

Patient Information  
Isla Simkins  
4951308731  
26/01/1982

Referrer Information  
Phillip Davis  
7121201W

Current Medications

Date	Details	Dose	Units	Instructions
19/04/2023	FAB Iron + Vitamin B Complex Tablets			
18/04/2023	Cenovis Mega B Tablets			
18/04/2023	Berocca Focus Effervescent tablets			

Past Relevant Medications  
Browse for More Medications

Allergies and Alerts  
18/04/2023 Dye

Medication Comments

Please enter the search criteria

Date from 08/11/2022 Date to 08/05/2023

Date	Details	Dose	Units	Instructions
19/04/2023	FAB Iron + Vitamin B Complex Tablets			CAP PRN AFTER MEALS MANE
18/04/2023	Cenovis Mega B Tablets			ONCE A DAY NOCTE
18/04/2023	Berocca Focus Effervescent tablets			TAB ONCE A DAY MANE

### 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  
Referral to Eastern Health

Allergy - Francis Thien

Submit Preview Park Help

Requested Information  
Allergy - Francis Thien

Attachments / Reports  
No reports selected  
No files attached

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

Medical, Social and Family History  
No medical history specified

Patient Information  
Emma Black  
8003602348418370  
13/12/1982

Referrer Information  
Phillip Davis  
800361990026805

Patient Information

Date of birth\* 13/12/1982 IHI 8003602348418370

Medicare/DVA Eligible\*  
 Yes  No

Medicare number 4950152331 Medicare expiry

DVA number QX712347 Pension number

Private health fund name Patient membership number

Name\*  
Emma Black

Gender\* Female Patient's indigenous status\* Please Select

Residential Address  
30 3rd Street, ELLEN GROVE, QLD, 4078

Postal Address  
Same as residential  
Yes

30 3rd Street, ELLEN GROVE, QLD, 4078

Contact Details (Select preferred phone contact)  
No contact details specified

Work\* Home\*  
Mobile\* Other\*

Email

Next of Kin  
No patient next of kin specified

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

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

**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

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Urgency:	Routine: Greater than 30 days
Referral Purpose:	Establish a diagnosis
Referral Details:	test

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

Information details are as provided by the sending health service. Please refer to the patient's medical records for clarification. An accurate assessment cannot be made without a full clinical history.

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.

HealthLink Form AU

Monash Health

Breast Surgery

**Requested Information**  
Breast Surgery

**Attachments / Reports**  
7 reports selected  
No files attached

**Medications, Allergies, Alerts**  
2 long term medications specified  
No medications specified  
1 medical warning specified

**Medical, Social and Family History**  
Medical history specified

**Patient Information**  
Luke Kelley  
4950177611 1  
08/09/1960

**Referrer Information**  
Philip Davis  
2121331W

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	
30/03/2023	medication blah blah				+
30/03/2023	Ascorbic acid 500mg - Biotin 150mcg Calcium 100mg - Cyanocobalamin 10mcg - Folic acid 400mcg			TAKE 1 BID BEFORE MEALS	+

**Past Relevant Medications**  
Browse for More Medications

No records found.

**Allergies and Alerts**

<input type="checkbox"/>	Date	Description	Comments
<input checked="" type="checkbox"/>	30/03/2023	Grass pollen	

**Medication Comments**

## 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:

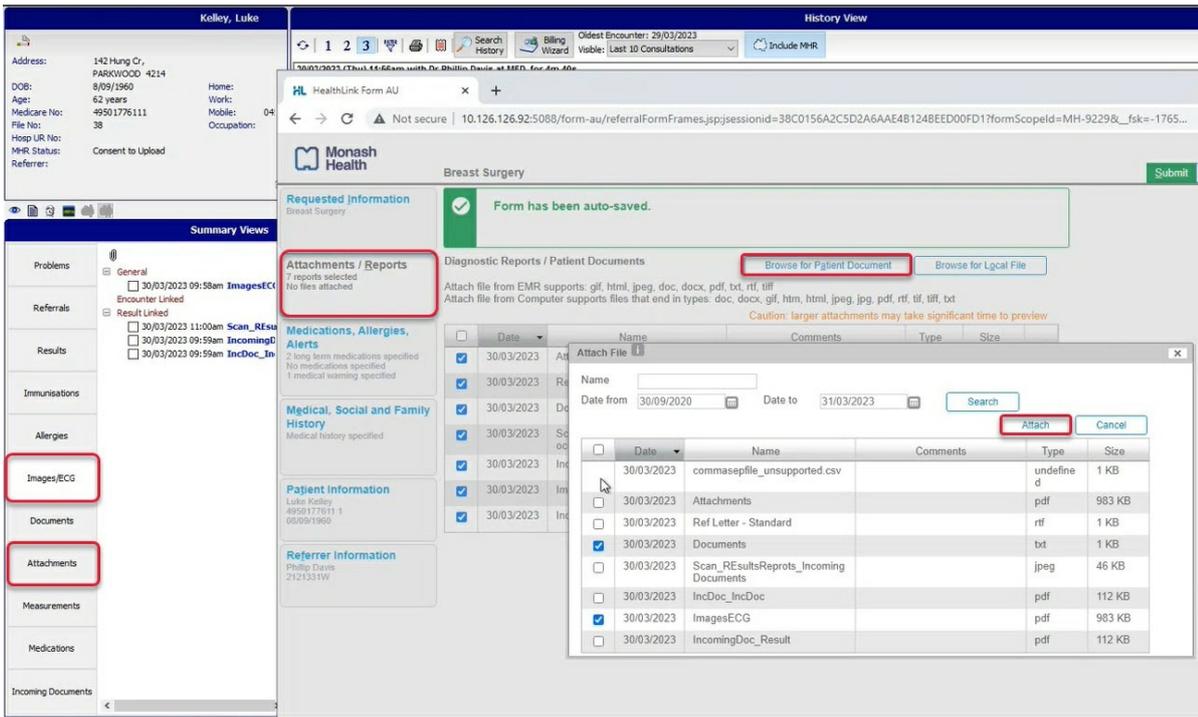
1. Select the SmartForms **Attachment/Reports** tab.
2. Tick the box next to the name of the file you want to attach.

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.

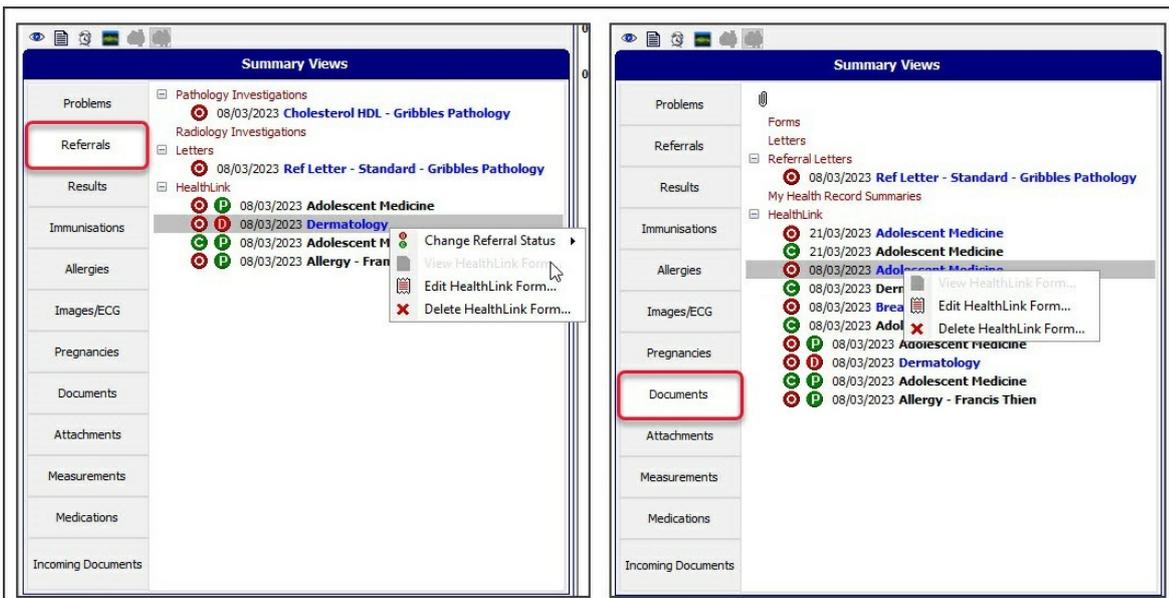


## SmartForms Summary Views

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.



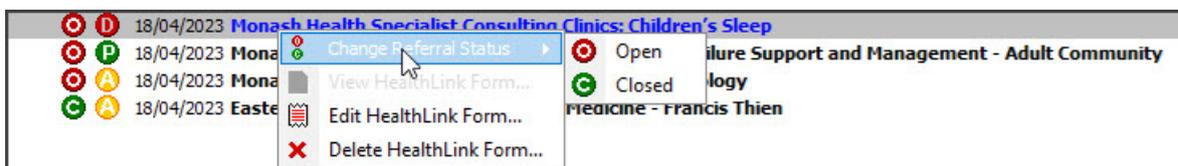
## SmartForm right-click options

## Zedmed options - for Referrals

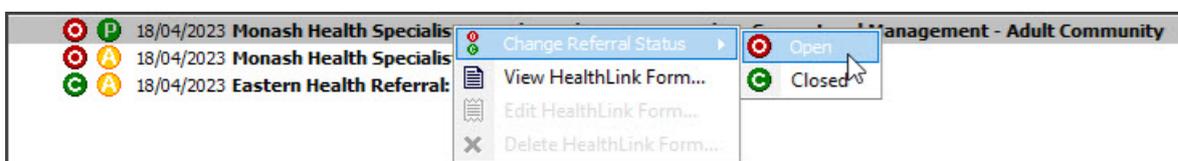
When you right-click a Referral, you can change the Zedmed Status to **(O) Open** (default when created) or **(C) Closed** (what you change it to when the results have been received). This manual setting helps keep track of what Referrals need to be followed up on.

## 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.

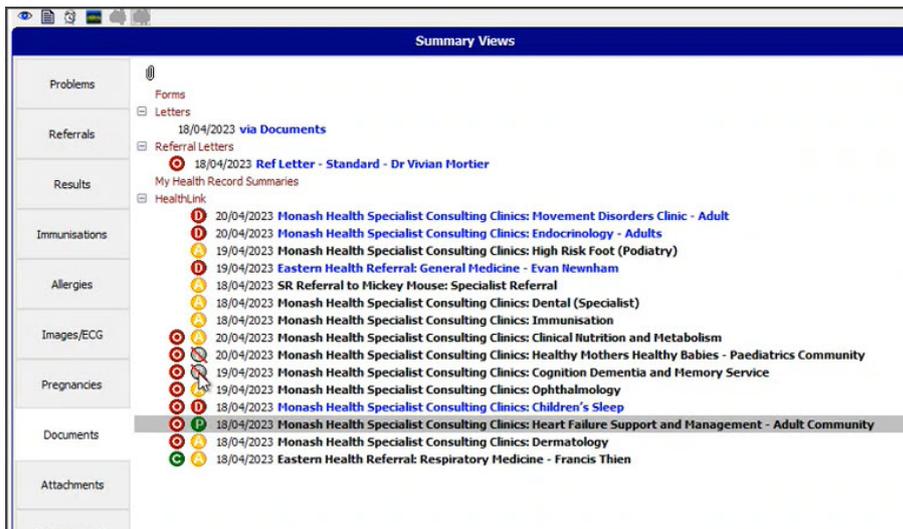
Left-column status icons (as with normal documents) for referrals only:

- **(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.

## 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.

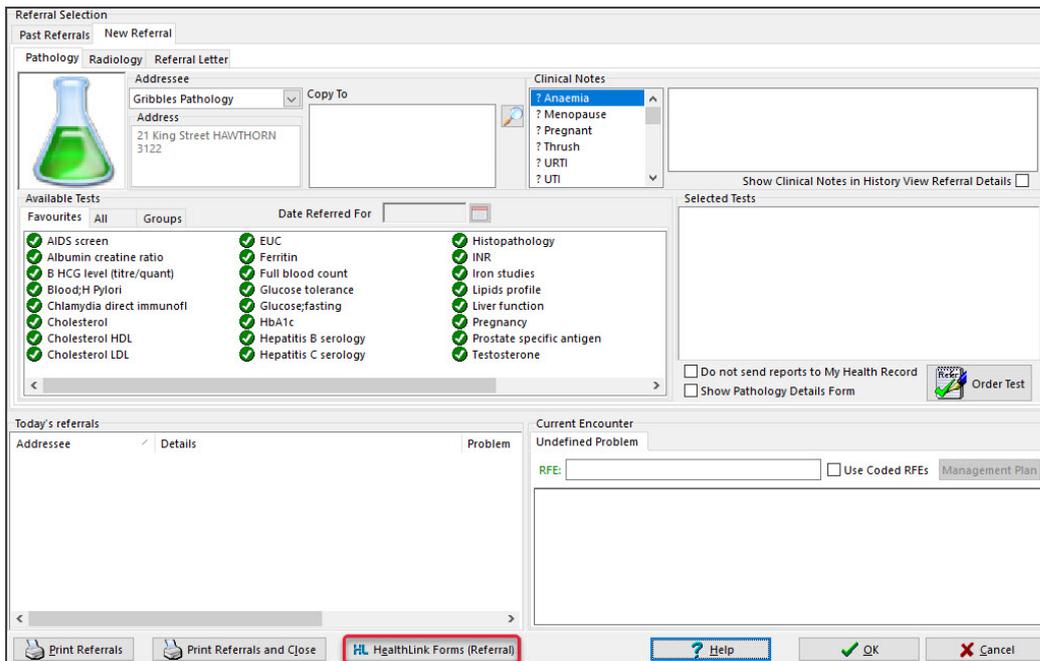
## Opening an SR SmartForm

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.

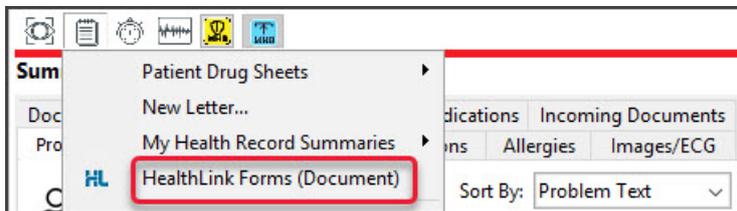
HealthLink SmartForms will open in your web browser.



**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)**.

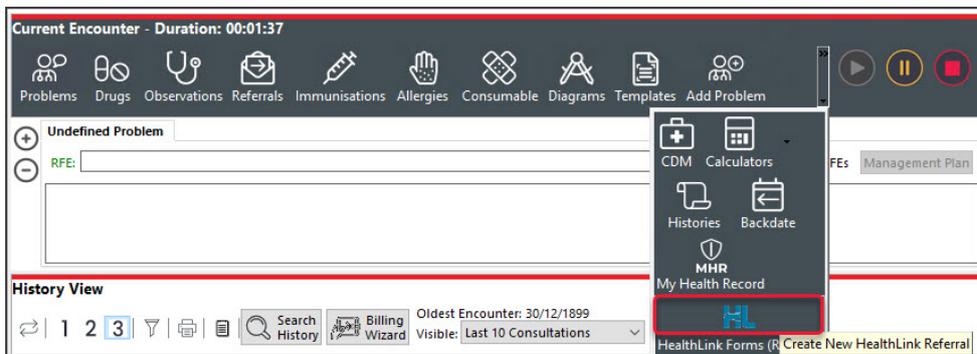
HealthLink SmartForms will open in your web browser.



**From the Current Encounter menu:**

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

HealthLink SmartForms will open in your web browser.

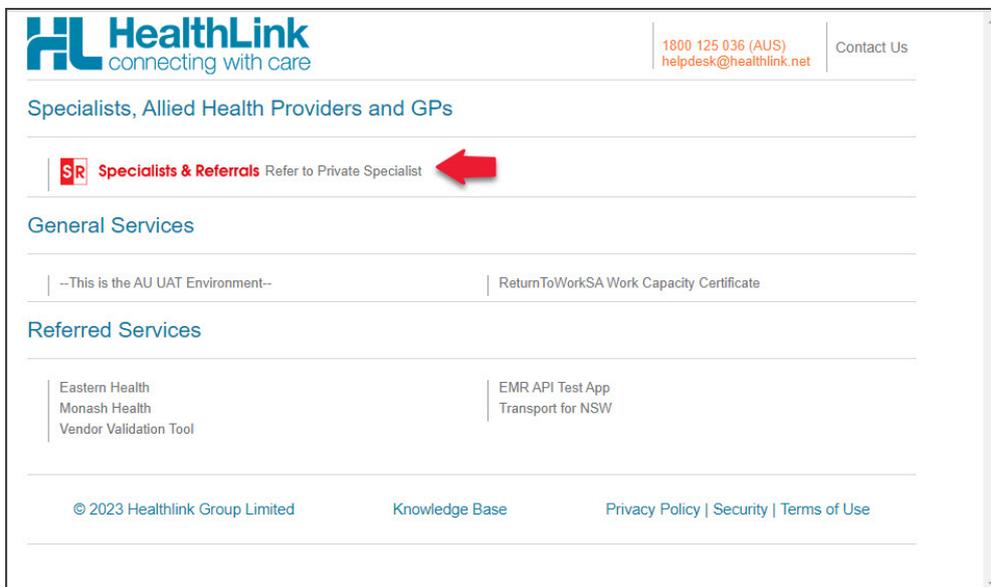


# Creating an SR SmartForm

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 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.

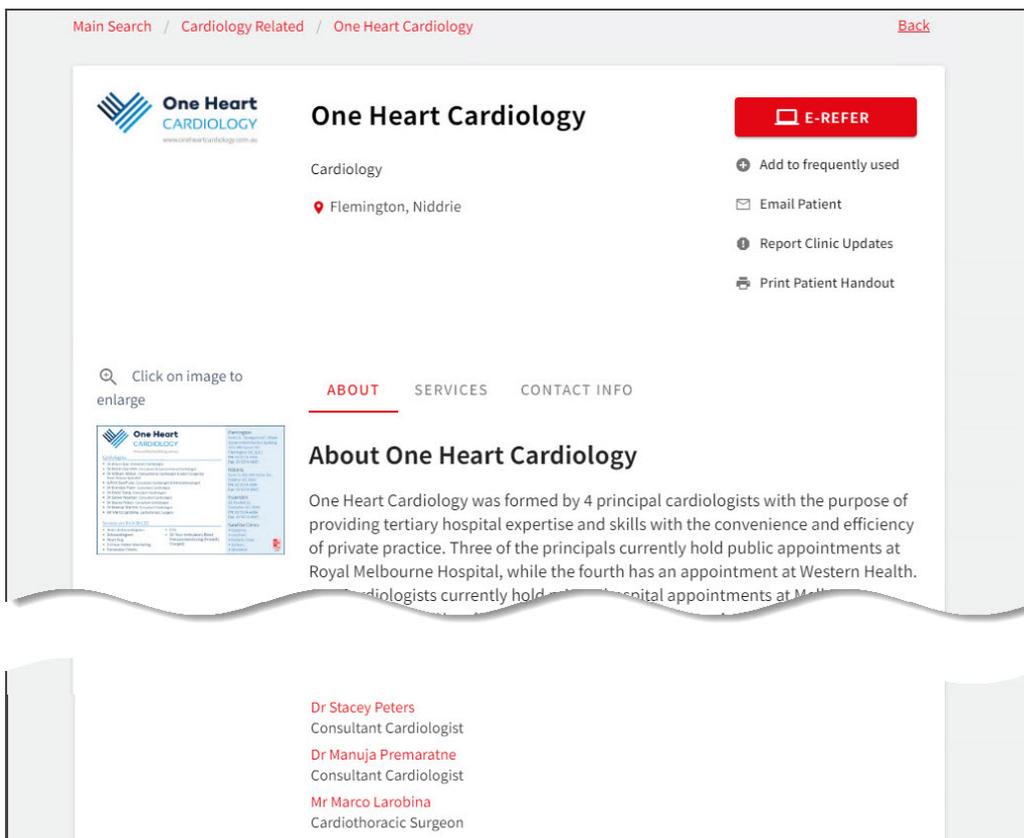
The screenshot displays the HL SR Specialists & Referrals website. The header includes the logo and navigation links for 'ABOUT', 'LIST', and 'SEARCH'. The main search area shows the current search criteria: 'Cardiology Related, Melbourne VIC', with a 'Back' link. Below this, there are search filters for 'Urgent Appointments Available' and 'Telehealth Available'. The search results are titled 'Results for: Cardiology Related, Melbourne VIC' and show '205 Results Found'. Two results are visible: 'One Heart Cardiology' (located in Flemington, Niddrie) and 'John Fawkner Cardiology' (located in Coburg). Each result includes a logo, name, specialty (Cardiology), location, and buttons for 'E-REFER', 'MANUAL REFER', and 'Email Patient'. A 'VIEW PROFILE' button is also present for the first result. On the left side, there is a search filter panel with fields for 'Enter Specialist Name', 'Select a Category', 'Enter Suburb or Telehealth Melbourne VIC', 'Distance' (set to 10 km), and 'Enter Keyword'. Below the search filters is a 'MY FREQUENTLY USED SPECIALISTS' section with instructions on how to use it.

## 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.
- 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

**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  
800360833380962  
04/12/1964

**Referrer Information**  
Phillip Davis  
100231XY

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

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.

### 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 Zedmed SmartForms interface for a 'Referral to One Heart Cardiology'. The top navigation bar includes 'Submit', 'Preview', 'Park', and 'Help' buttons. A green notification box at the top states 'Form has been auto-saved.' The left sidebar contains several sections: 'Requested Information' (Specialist Referral), 'Attachments / Reports' (1 report 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), and 'Referrer Information' (Phillip Davis, 100231XY). The main content area is titled 'Diagnostic Reports / Patient Documents' and features two buttons: 'Browse for Patient Document' and 'Browse for Local File'. Below these buttons, there is a table of attachments with columns for 'Date', 'Name', 'Comments', 'Type', and 'Size'. A warning message states 'Caution: larger attachments may take significant time to preview'. The table contains three rows of data:

<input type="checkbox"/>	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	

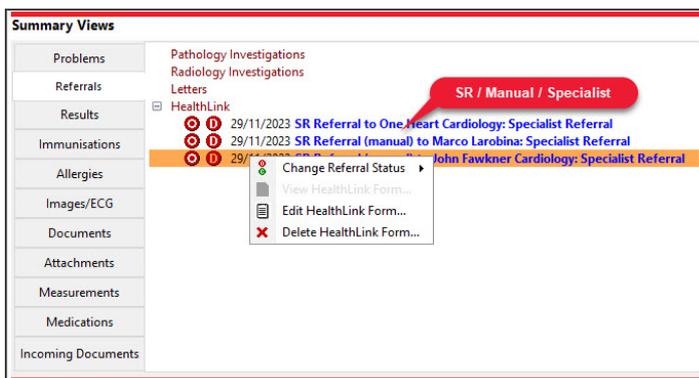
## SmartForms Summary Views

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.

