

# SmartForm & SR referrals

Last Modified on 15/10/2024 2:11 pm 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** (3-pages)

## Considerations

- SmartForms are now used 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

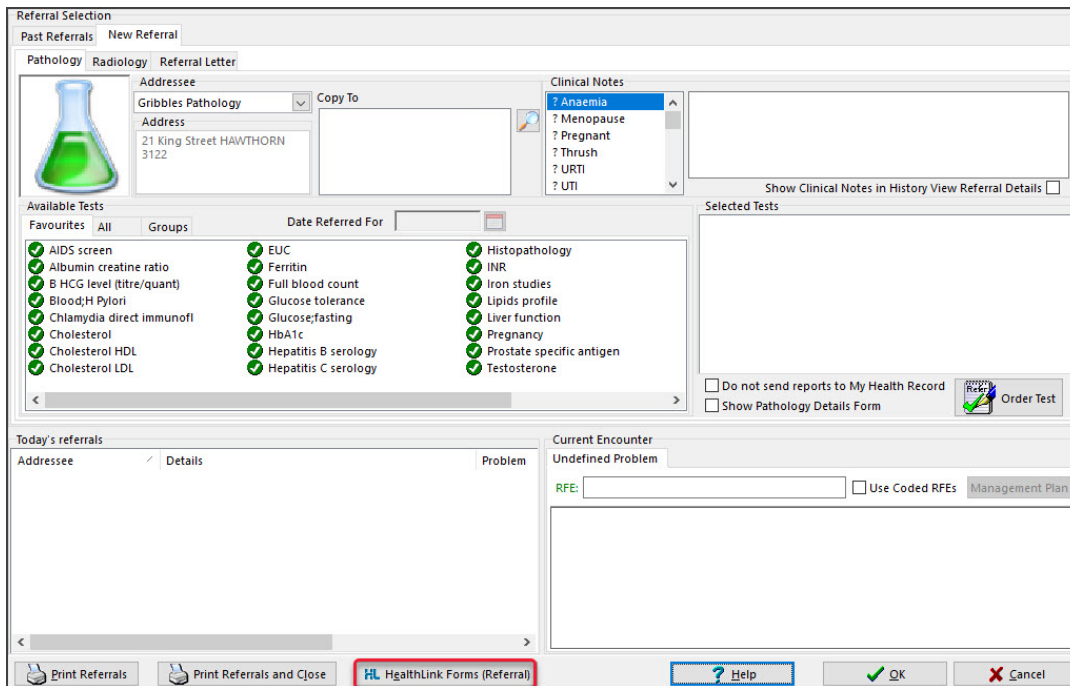
## Opening Healthlink SmartForms

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.

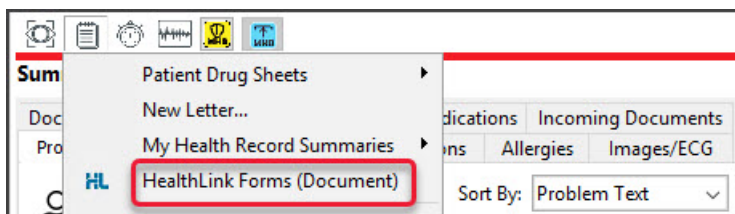
HealthLink SmartForms will open in your web browser.



### 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)**.

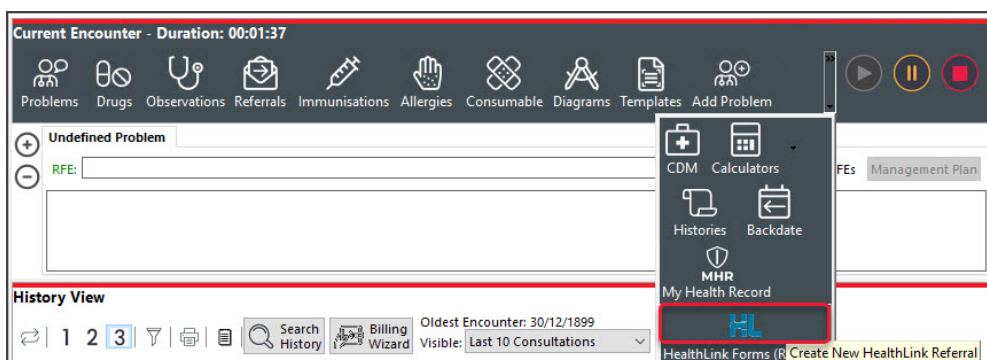
HealthLink SmartForms will open in your web browser.



### 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

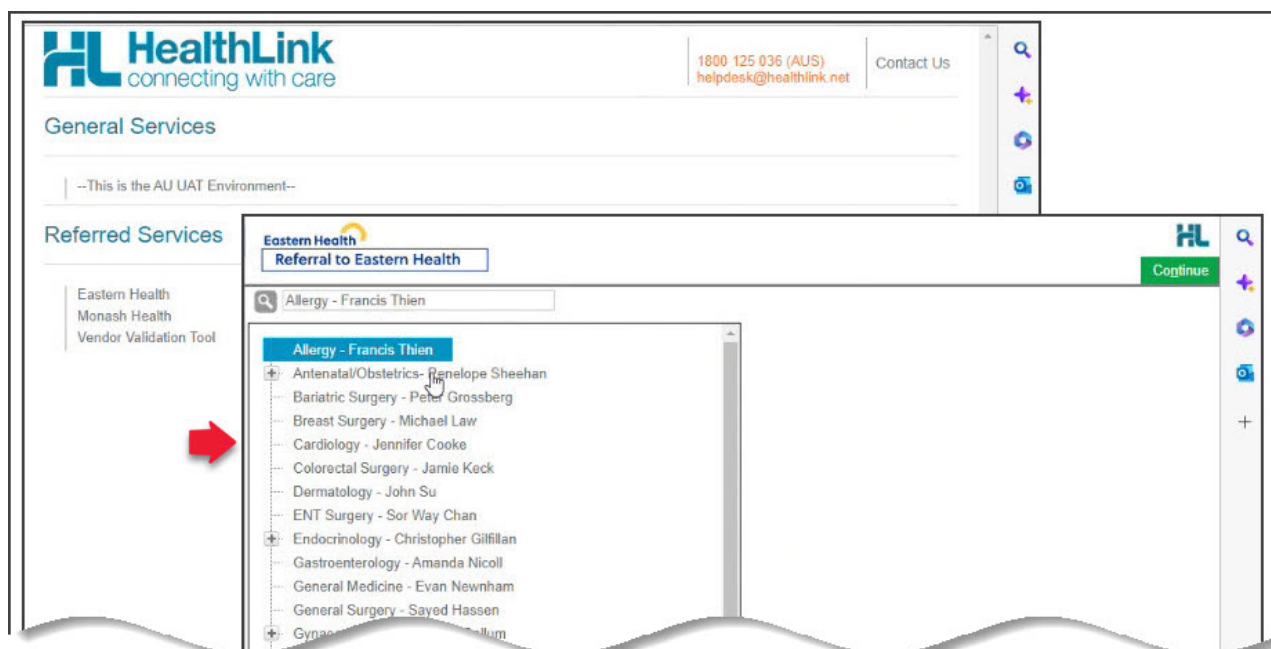
HealthLink SmartForms uses a standardised format to record, send and store the document's information.

## 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

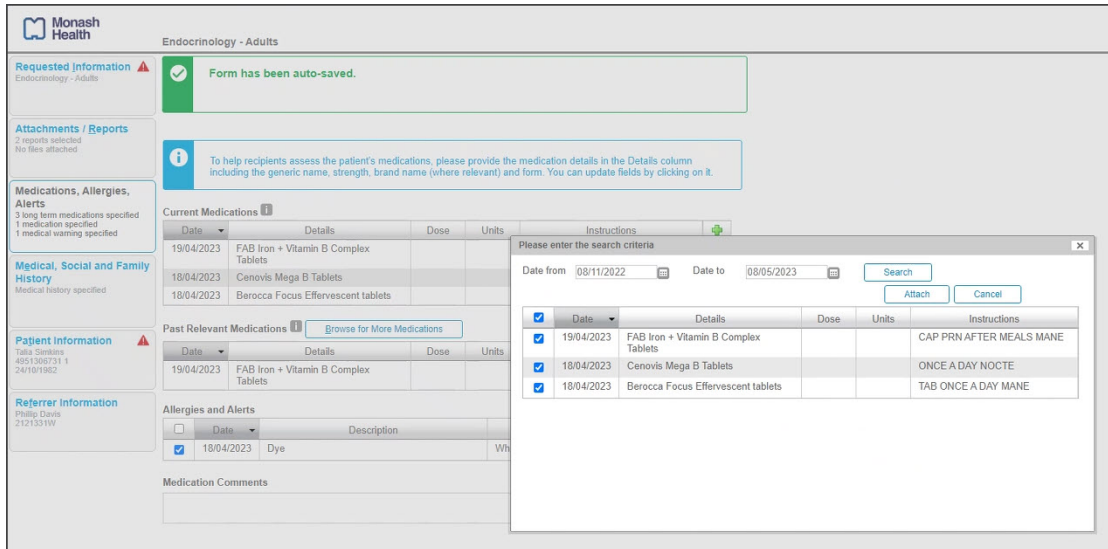
Go through each tab on the left and fill in the required information. Zedmed will prefill what fields it can with the patient and referrer information that is available in Zedmed. The Requested Information tab will be different for each service, and the other five tabs will remain the same.

**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:

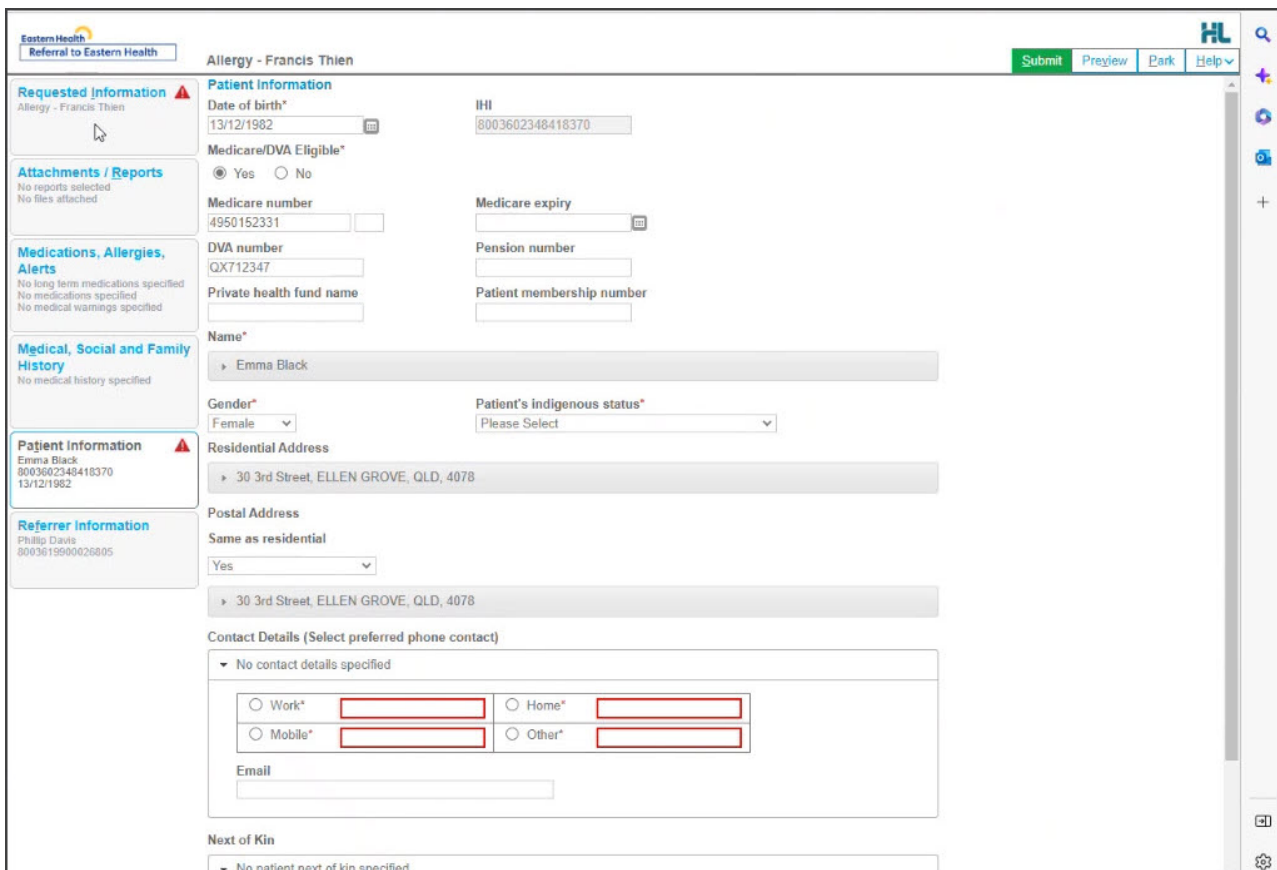
- The **Park** option saves the form so you can continue at a later time.
  - It will be saved in Zedmed's **Summary Views > Referrals** or **Documents** tab with the **(D)** draft status.
  - If you Park a form, you will need to reselect any attachments.
- **Editing the information**, which is useful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



### 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.



**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

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 service for clarification. Inaccurate assessment of patient information may result in incorrect referral.

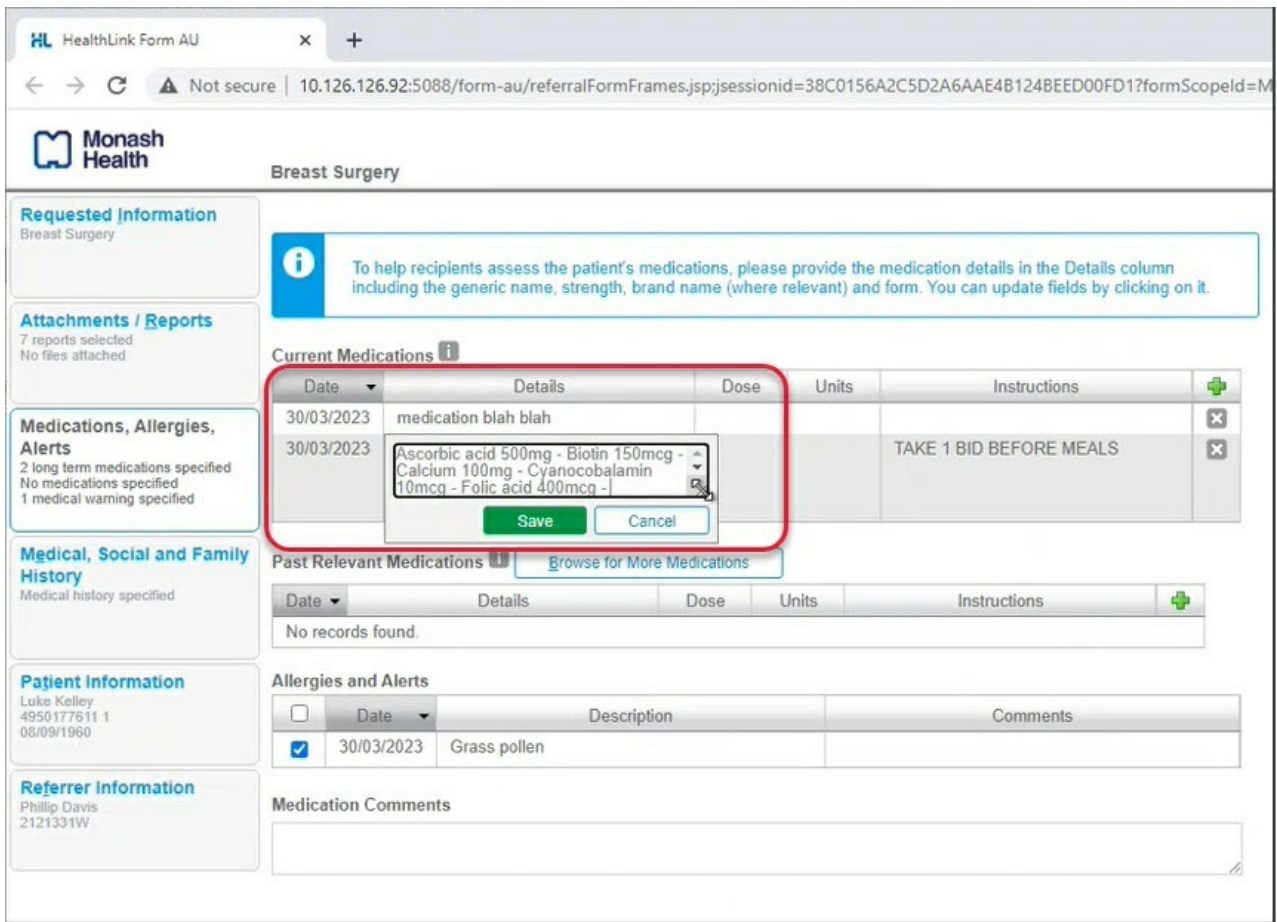
The Summary Views will show the status of the SmartForm. After 30-60 minutes, the status will show P-Processed if the service provider has SmartForm confirmations running. You can also call to confirm. If the SmartForm is not accepted, you will need to recreate and resubmit it. To learn more, see the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

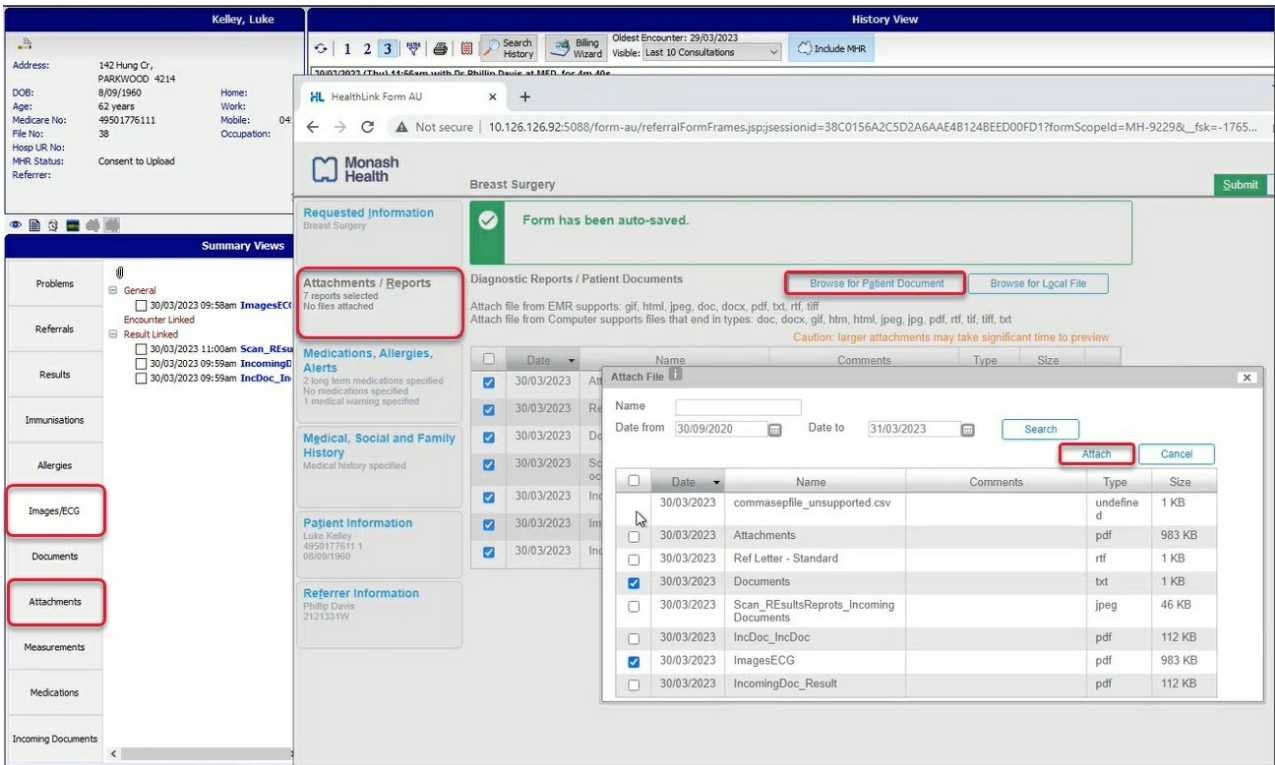
To locate and add files from a longer time frame:

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.

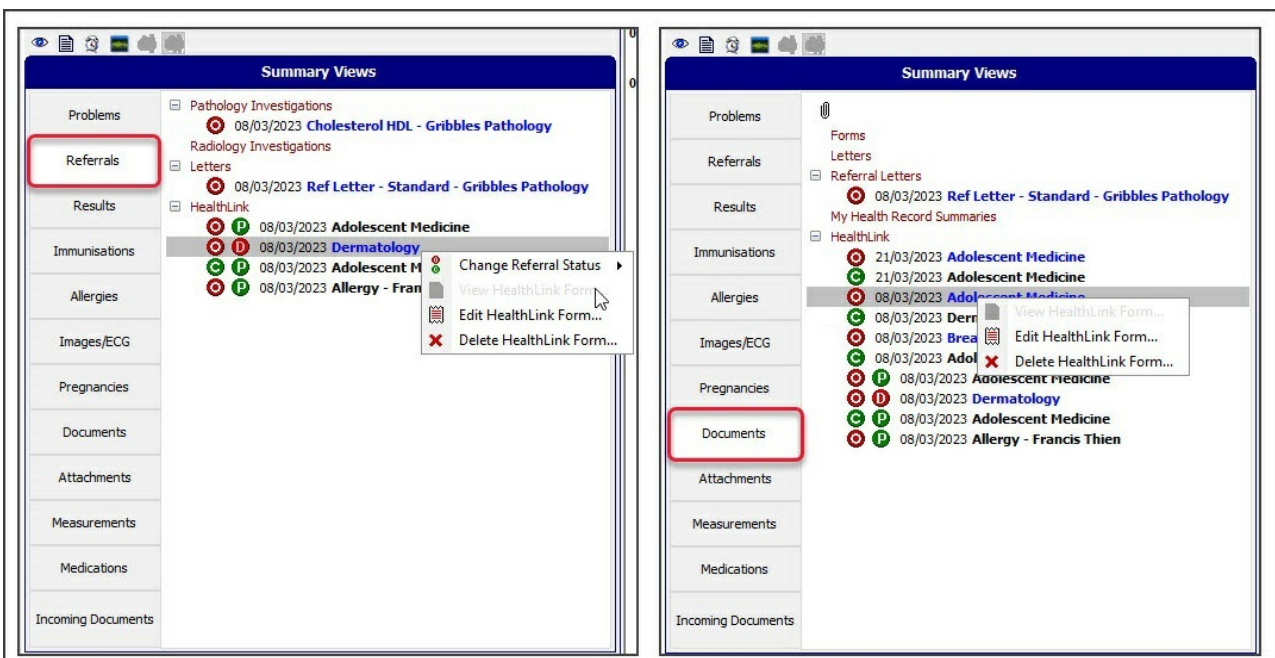


## SmartForms Summary Views

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.



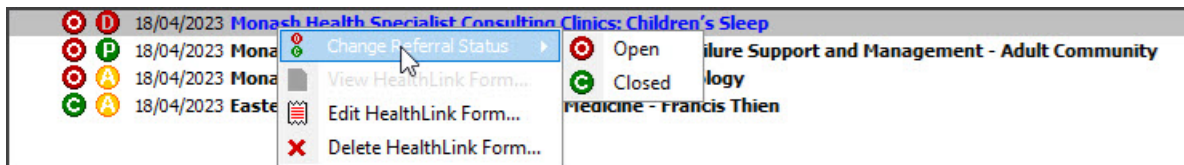
## SmartForm right-click options

### Zedmed options - for Referrals

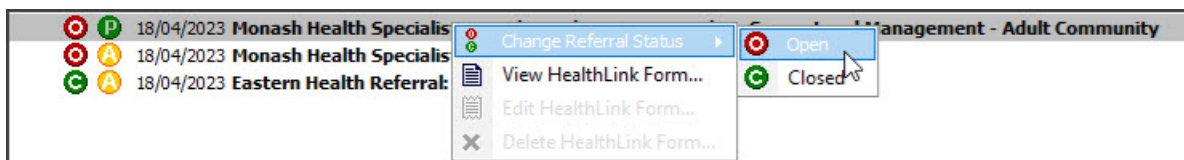
When you right-click a Referral, you can change the Zedmed Status to **(O) Open** (default when created) or **(C) Closed** (what you change it to when the results have been received). This manual setting helps keep track of what Referrals need to be followed up on.

### 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.

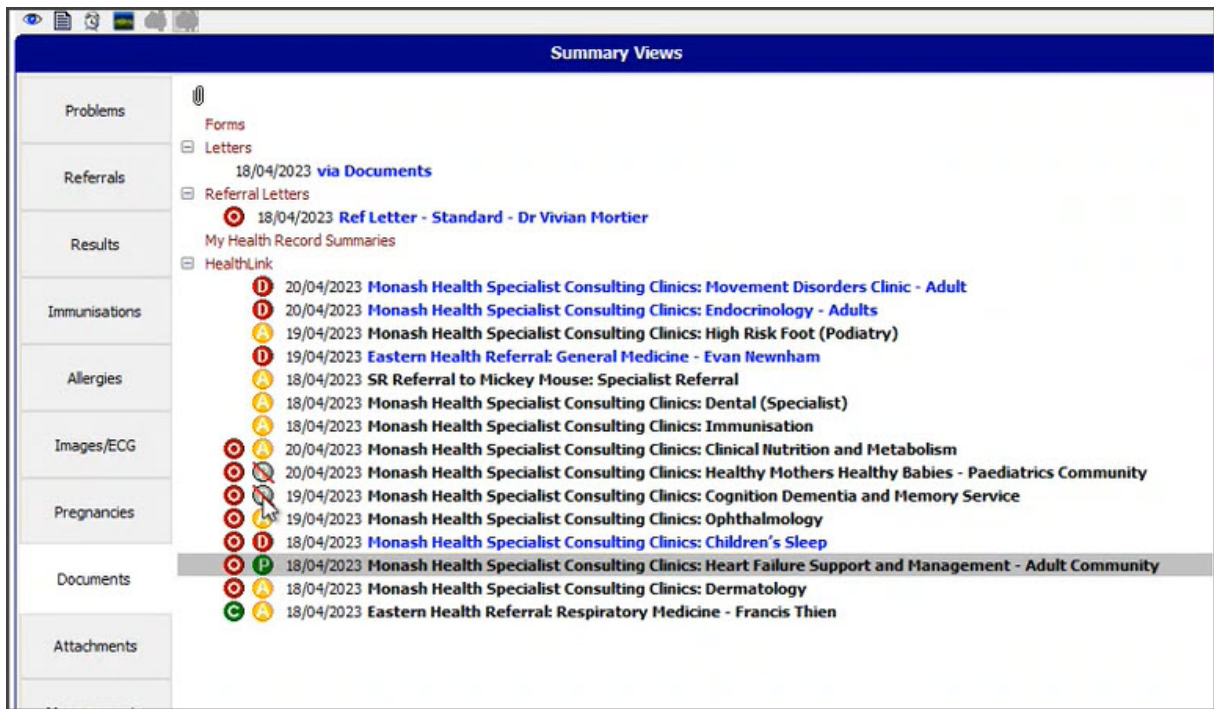
Left-column status icons (as with normal documents) for referrals only:

- **(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.

## 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** (3-pages)

## 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.

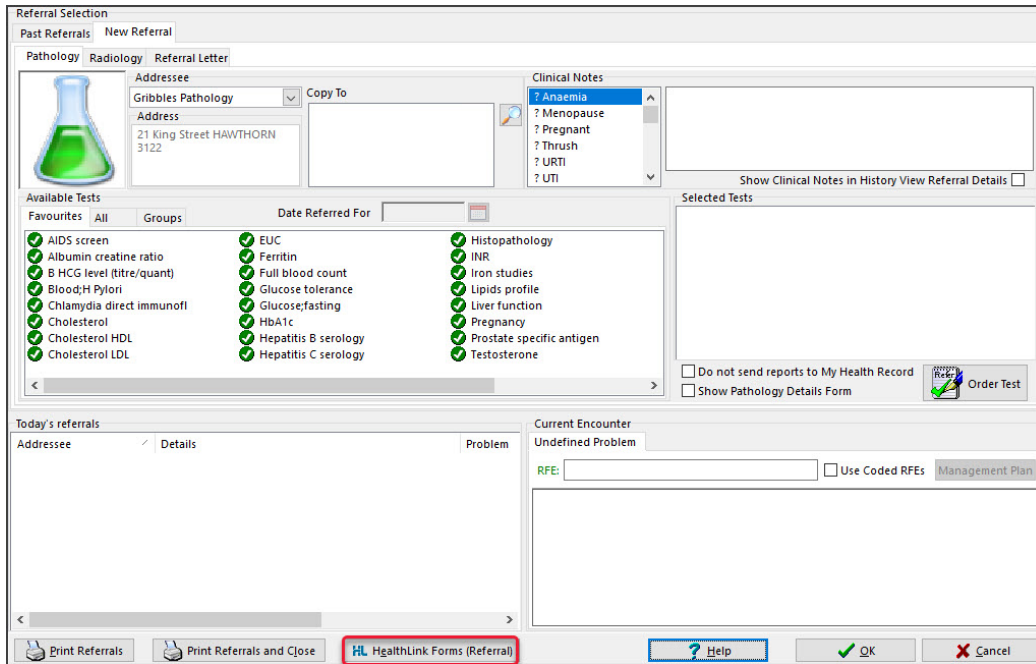
## Opening an SR SmartForm

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.

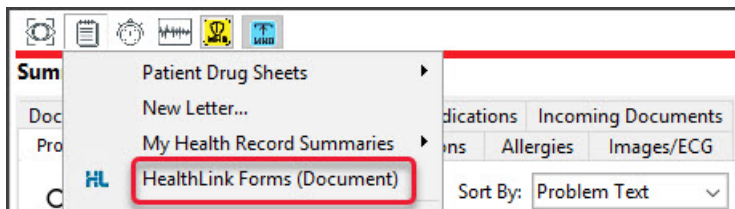
HealthLink SmartForms will open in your web browser.



#### 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)**.

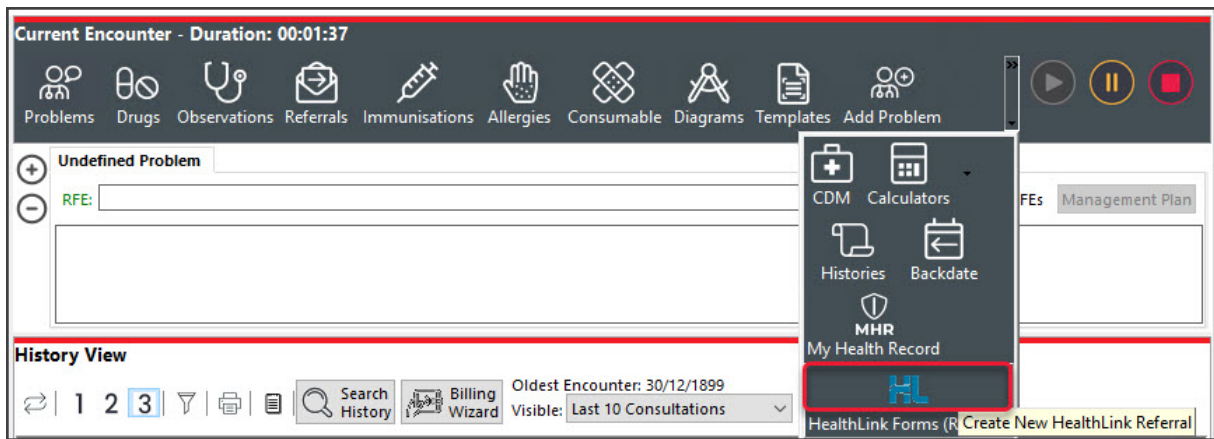
HealthLink SmartForms will open in your web browser.



#### 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.

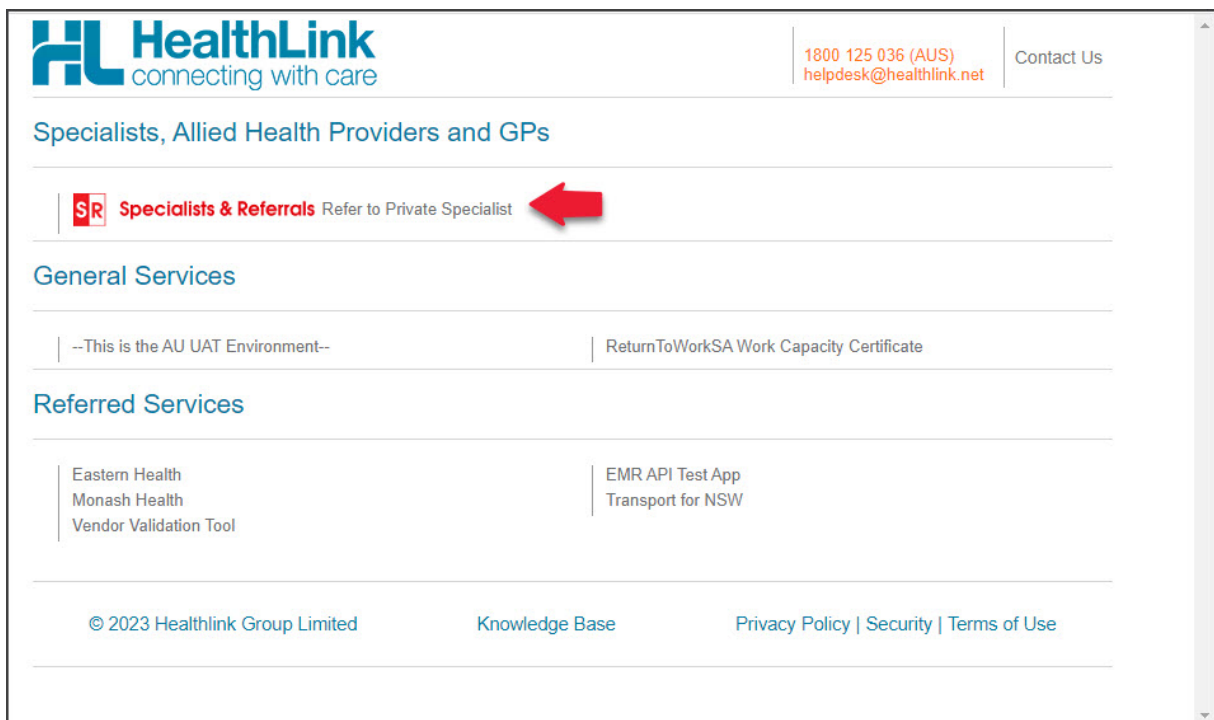


## Creating an SR SmartForm

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.

The screenshot shows the HL SR Specialists & Referrals website. At the top, there are navigation links for 'ABOUT', 'LIST', and 'SEARCH'. The main search area includes a 'Search the Medical Specialists Directory' section with a book cover image. The search form has the following fields: 'Enter Specialist Name' with the value 'jones', 'Select a Category' with 'Cardiology Related', 'Enter Suburb or Telehealth' with 'Melbourne VIC', 'Distance' with '10 km', and 'Enter Keyword'. A red 'SEARCH SPECIALISTS' button is at the bottom of the form. To the right, a 'Welcome to SR' banner lists benefits: '+ Simple referral form saving you time', '+ Live now in NSW, ACT, VIC, TAS, SA, WA', '+ One seamless process for all electronic and manual (fax, hand to patient) referrals', and '+ Many specialist clinics are busy, so ask your patient to call the specialist if they are not contacted within 3 days'. Contact information for queries or training is provided: '1800 147 047' and 'sr-support@specialistsreferrals.com.au'. At the bottom, there are sections for 'MY FREQUENTLY USED' and 'RECENTLY PROFILED SPECIALISTS' with navigation arrows.

**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 shows the HL SR Specialists & Referrals website. The top navigation bar includes 'ABOUT', 'LIST', and 'SEARCH'. The main search area is titled 'Main Search / Cardiology Related, Melbourne VIC' with a 'Back' link. On the left, there is a search filter sidebar with fields for 'Enter Specialist Name', 'Select a Category' (set to 'Cardiology R...'), 'Enter Suburb or Telehealth Melbourne VIC', 'Distance' (set to '10 km'), and 'Enter Keyword'. A red 'SEARCH' button is at the bottom of the sidebar. Below the sidebar is a section titled 'MY FREQUENTLY USED SPECIALISTS' with instructions: 'From Profile pages add specialists to your own list of Frequently Used Specialists.' The main content area is titled 'Results for: Cardiology Related, Melbourne VIC' and shows '205 Results Found'. There are two filter checkboxes: 'Urgent Appointments Available' and 'Telehealth Available'. The first result is for 'One Heart Cardiology', located in 'Flemington, Niddrie'. It features an 'E-REFER' button, an 'Email Patient' link, and a 'VIEW PROFILE' button. The second result is for 'John Fawkner Cardiology', located in 'Coburg'. It features a 'MANUAL REFER' button and an 'Email Patient' link.


## 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.

Main Search / Cardiology Related / One Heart Cardiology [Back](#)



**One Heart  
CARDIOLOGY**  
www.oneheartcardiology.com.au

## One Heart Cardiology


Cardiology

📍 Flemington, Niddrie

**E-REFER**

- + Add to frequently used
- ✉ Email Patient
- i Report Clinic Updates
- 🖨 Print Patient Handout

🔍 Click on image to enlarge



**ABOUT** SERVICES CONTACT INFO

---

### About One Heart Cardiology

One Heart Cardiology was formed by 4 principal cardiologists with the purpose of providing tertiary hospital expertise and skills with the convenience and efficiency of private practice. Three of the principals currently hold public appointments at Royal Melbourne Hospital, while the fourth has an appointment at Western Health.

... cardiologists currently hold ... hospital appointments at Melb...

**Dr Stacey Peters**  
Consultant Cardiologist

**Dr Manuja Premaratne**  
Consultant Cardiologist

**Mr Marco Larobina**  
Cardiothoracic Surgeon

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 HL

[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.

The screenshot shows the HL SR Specialists & Referrals SmartForm interface. At the top, there is a header with the HL SR logo and the text 'Specialists & Referrals'. Below the header, the form title is 'Referral to One Heart Cardiology'. On the right side of the header, there are buttons for 'Submit', 'Preview', 'Park', and 'Help'. The main content area is divided into several sections. On the left, there is a sidebar with the following sections: '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), and 'Referrer Information' (Phillip Davis, 100231XY). The main content area has a green notification box that says 'Form has been auto-saved.' Below this, there is an information box that says '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.' The main content area also has three tables: 'Current Medications', 'Past Relevant Medications', and 'Allergies and Alerts'. Each table has a 'Date' column, a 'Details' column, a 'Dose' column, a 'Units' column, and an 'Instructions' column. The 'Current Medications' and 'Past Relevant Medications' tables both show 'No records found.' The 'Allergies and Alerts' table has a 'Date' column, a 'Description' column, and a 'Comments' column, and also shows 'No records found.' At the bottom of the main content area, there is a text area for '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 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.' Below this, the 'Attachments / Reports' section is active, showing 'Diagnostic Reports / Patient Documents'. It includes buttons for 'Browse for Patient Document' and 'Browse for Local File'. A table lists three reports:

<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	

Other sections on the left include 'Requested Information', 'Medications, Allergies, Alerts / Warnings', 'Medical, Social and Family History', 'Patient Information', and 'Referrer Information'.

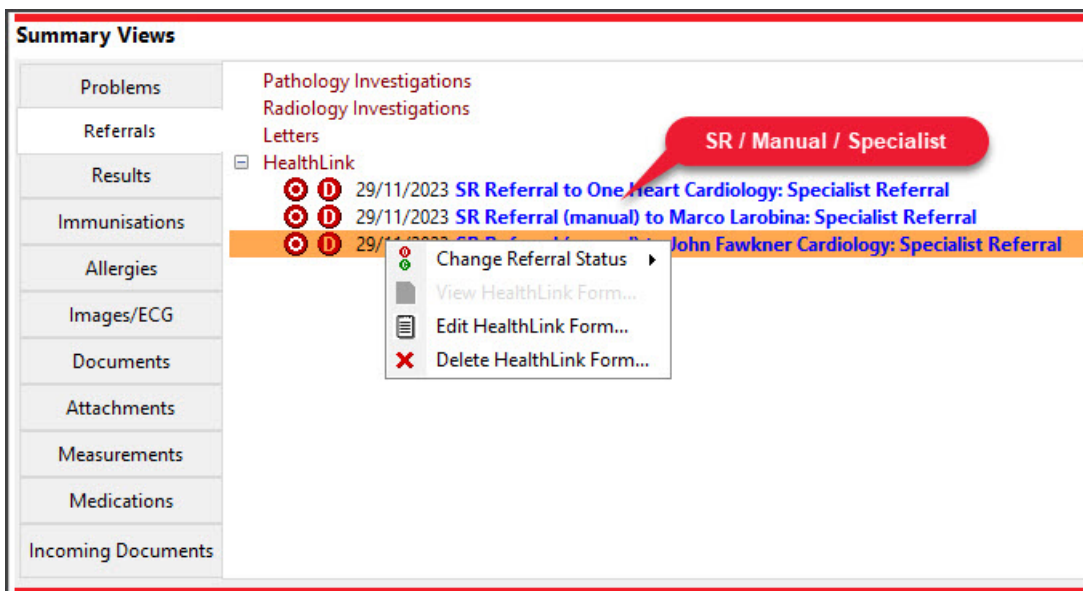
## SmartForms Summary Views

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.

