

# SmartForms quickstart

Last Modified on 15/01/2024 1:51 pm AEDT

HealthLink SmartForms are used to electronically refer patients to providers and services, some of which require SmartForms for referrals. SmartForms are integrated with Zedmed v35.10.2 and later, which will open SmartForms and prepopulate patient and referrer information, and allow you to add attachments and notes that are saved in Zedmed.

## Zedmed SmartForms integration video

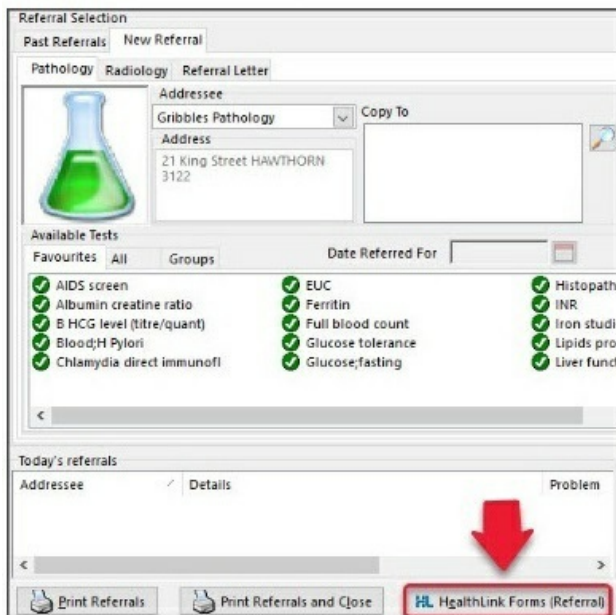
Your browser does not support HTML5 video.

## Opening HealthLink SmartForms

- **Referrals module** - at the bottom of the Pathology, Radiology or Referral letter tabs.
- **Quick Documents** - in the patient record.
- **Current Encounter menu** - Using the drop-down at the end of the menu.

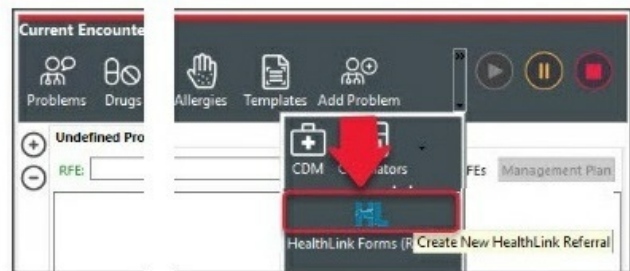
### The Referrals module

On the Pathology, Radiology and Referral letter tabs



### The Current Encounter menu

Use the drop-down at the end of the menu



### The Quick Documents menu

From an open patient record in Clinical.



## Creating a SmartForm

When the SmartForm opens, select the organisation and service. The SmartForm will open and you can fill in each tab then select **Submit**. If you select **Park**, it will save a draft in **Summary Views** that can be complete at a later date.

## Adding attachments

In the **Attachments/Reports** tab - select the check box next to the relevant attachment to be included in the referral. Use **Browse for Patient Document** to change the date range of the files displayed.

Monash Health  
Endocrinology - Adults

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

Attachments / Reports  
1 report selected  
No files attached

Diagnostic Reports / Patient Documents  
Browse for Patient Document | Browse for Local File

Attach file from EMR supports: gif, html, jpeg, doc, docx, pdf, txt, rtf, tiff  
Attach file from Computer supports files that end in types: doc, docx, gif, htm, html, jpeg, jpg, pdf, rtf, tiff, txf, txt  
Caution: larger attachments may take significant time to preview

<input type="checkbox"/>	Date	Name	Comments	Type	Size	Icons
<input type="checkbox"/>	18/04/2023	via Attachments		txt	4 KB	[Icons]
<input checked="" type="checkbox"/>	18/04/2023	Ref Letter - Standard		rtf	1 KB	[Icons]
<input type="checkbox"/>	18/04/2023	via Documents		txt	4 KB	[Icons]
<input type="checkbox"/>	18/04/2023	via IncDoc -> IncDoc		txt	1 KB	[Icons]
<input type="checkbox"/>	18/04/2023	via Images/ECG		pdf	112 KB	[Icons]
<input type="checkbox"/>	18/04/2023	TESTING RESULT ONE		html		[Icons]
<input type="checkbox"/>	18/04/2023	FBC \N\ General Haem		html		[Icons]
<input type="checkbox"/>	18/04/2023	Letter - HL7 2.3 Referral Letter		html		[Icons]
<input type="checkbox"/>	18/04/2023	Letter - HL7 2.3 Referral Letter segment 1		pdf		[Icons]
<input type="checkbox"/>	18/04/2023	via Results -> Results		rtf	20 KB	[Icons]

## SmartForms status icons

The right column icons tell you the SmartForm's status. Right-click an item to open its actions menu.

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

Summary Views

Problems: Forms, Letters

Referrals: 18/04/2023 via Documents

Results: 18/04/2023 Ref Letter - Standard - Dr Vivian Mortier

My Health Record Summaries

HealthLink

- 20/04/2023 Monash Health Specialist Consulting Clinics: Movement Disorders Clinic - Adult
- 20/04/2023 Monash Health Specialist Consulting Clinics: Endocrinology - Adults
- 19/04/2023 Monash Health Specialist Consulting Clinics: High Risk Foot (Podiatry)
- 19/04/2023 Eastern Health Referral: General Medicine - Evan Newnham
- 18/04/2023 SR Referral to Mickey Mouse: Specialist Referral
- 18/04/2023 Monash Health Specialist Consulting Clinics: Dental (Specialist)
- 18/04/2023 Monash Health Specialist Consulting Clinics: Immunisation
- 20/04/2023 Monash Health Specialist Consulting Clinics: Clinical Nutrition and Metabolism
- 20/04/2023 Monash Health Specialist Consulting Clinics: Healthy Mothers Healthy Babies - Paediatrics Community
- 19/04/2023 Monash Health Specialist Consulting Clinics: Cognition Dementia and Memory Service
- 19/04/2023 Monash Health Specialist Consulting Clinics: Ophthalmology
- 18/04/2023 Monash Health Specialist Consulting Clinics: Children's Sleep
- 18/04/2023 Monash Health Specialist Consulting Clinics: Heart Failure Support and Management - Adult Community
- 18/04/2023 Monash Health Specialist Consulting Clinics: Dermatology
- 18/04/2023 Eastern Health Referral: Respiratory Medicine - Francis Thien