

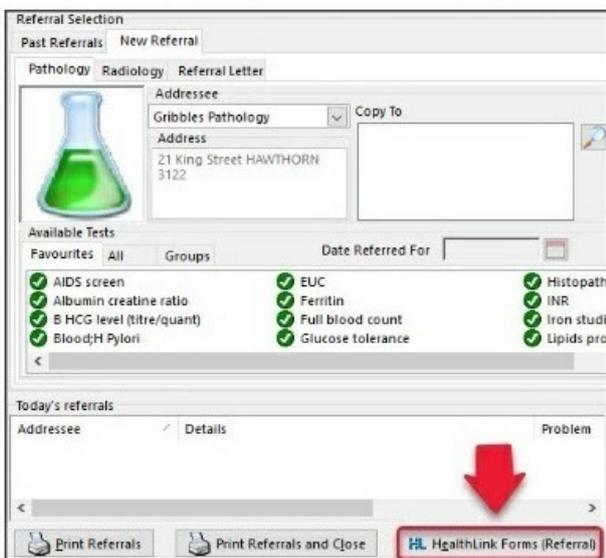
# SmartForms SR quickstart

Last Modified on 01/12/2023 3:09 pm AEDT

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.

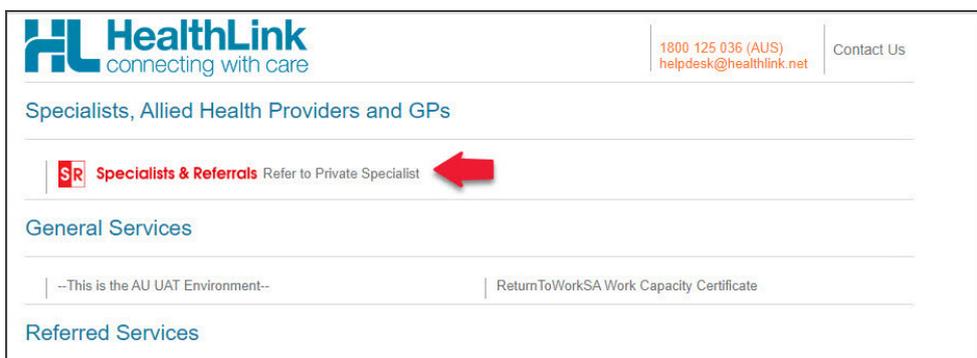
## Step 1 - Open SR Specialists and Referrals from 3 locations

- **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.



## Step 2 - Locate a specialist, allied health provider or GP

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



2. Search for the SR practitioner or practice.

Use the following search fields to set the criteria then select **Search Specialists**:

- **Enter Specialist Name** - opens a list of specialists and practices that match the name you type.
- **Select a Category** - opens a list of specialties to choose from. You must use one of the options provided.

- **Enter Suburb or Telehealth** - opens a list of locations that match what you type, including 'telehealth'.
- **Enter Keyword** - opens a list of common options that match what you type. You can enter any word.

3. Select the **MANUAL REFER** or **E-REFER** button. You will then be shown the locations available.

4. Optional step - **View Profile**

The **View Profile** button opens the Specialists and Practices profile page, which includes the services available and a list of specialists at the clinic with links to their SR profiles.

5. Select the location to send the referral to and the SmartForm will open.

- A SmartForm for an E-REFER will have a green **Submit** button.
- A SmartForm for a MANUAL REFER will have a green **Print** button.
- **Park** saves a draft in the patient's **Summary Views** (Referrals or Documents tab) as D(draft) status.

The screenshot shows a web-based form titled "Referral to One Heart Cardiology". The form is divided into several sections on the left and a main data entry area on the right. The top right corner has buttons for "Submit", "Preview", "Park", and "Help".

**Requested Information** (Specialist Referral):  
Name: One Heart Cardiology  
Fax: 03 9376 7238  
Phone: 03 9374 4884

**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  
89036863333309962  
04/12/1964

**Referrer Information**:  
Phillip Davis  
100231XX

**Main Form Fields**:  
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):

## Step 2 - Fill in the SmartForm

Enter the information into each tab. Zedmed will prefill fields with the patient and referrer information from Zedmed. The selected practitioner or practice will also have their information added to the SmartForm.

## Step 4 - Submit or Print the SmartForm

Complete the SmartForm by selecting **Print** (for a Manual Refer) or **Submit** (for an E-Refer). When the form has been submitted it 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.

- **Submit** will give you a chance to print the referral, then send it using HealthLink's secure messaging.
- **Print** will send the SmartForm to your printer for hand delivery or faxing.

## SmartForms Summary Views

Referrals are saved under the **HealthLink** header in the **Summary Views>Referrals** tab. Referrals and documents are saved under the **HealthLink** header in the **Summary Views>Documents** tab.

- **(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	Pathology Investigations
Referrals	Radiology Investigations
Results	Letters
Immunisations	HealthLink
Allergies	29/11/2023 SR Referral to One Heart Cardiology: Specialist Referral
Images/ECG	29/11/2023 SR Referral (manual) to Marco Larobina: Specialist Referral
Documents	29/11/2023 SR Referral (manual) to John Fawcner Cardiology: Specialist Referral

SR / Manual / Specialist

- Change Referral Status
- View HealthLink Form...
- Edit HealthLink Form...
- Delete HealthLink Form...