# QUICK START GUIDE

# SR SPECIALISTS & REFERRAL SMARTFORM - GENIE

The SR Specialists & Referral Smartform has been designed to make it easier for you to receive electronic referrals and to refer your patients electronically to private specialists. This quick start guide has been developed to help you navigate receiving & sending SR referrals using the new digital form in **Genie.** 

SR Support

# 1800 147 047

specialistsreferrals.com.au sr-support@specialistsreferrals.com.au

# SR Specialists & Referrals

Search the Medical Specialists Directory	Enter Specialists Name	SR Makes Referrals Fasy
medical opecialists birectory	Select a Category	Search the comprehensive
and the second second	Select Region	Medical Specialists Directory
	Enter Keywords	Complete the simple referral form     Send free electronic referrals
The second	Q SEARCH SPECIALISTS	900,000+ referrals and counting
IY REGION	RECENTLY PROFILED SPECIALISTS	< >
Select Your Default Region	Dr Mariolyn Raj	ENT Doctors
Set My default Region	Urology Related	DOCTORS ENT - Otolaryngology Related
	Melbourne Region	→  P Melbourne Region →
IV FREQUENTLY USED		
wn list of Frequently Used Specialists		

Requested Information	Name	Andrew Chia
opodulist Notoriul	Fax	03 9928 6289
	Phone	03 9928 6288
Attachments / <u>Reports</u> No reports selected	Street Address	East Melbourne, 171 Grey St, East Melbourne VIC 3
No files attached	Referral Date*	08/11/2019
Medications / Warnings	Referral Continuation*	New O Continuation
4 long term medications specified No medications specified 1 medical warning specified	Referral Period*	12 months
	Feedback Requested*	Yes     O     No
Medical History Medical history specified	Interpreter Required*	O Yes   No
Patient Information	Reason for Patient Referral*	Browse for Consultation Notes
QPCV2140F 23/02/1923		
Referrer Information Carmel Cervin	í	



# SR Specialists & Referrals



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# Welcome to SR Specialists & Referrals

Thank you for taking time to review the SR Specialists & Referrals service – we hope you find it helpful and easy to use.

- SR Specialists & Referrals is the online version of the Medical Specialists NSW & ACT and VIC & TAS Directories. All private specialists are in the directory and some specialists pay for a premium entry. SR is also now live for GPs to search and refer to private specialists in SA and WA.
- SR Specialists & Referrals is a collaboration between the Medical Specialists Directory published by Cervin Media and HealthLink.
- You can receive SR referrals and use SR to refer to all specialists those setup for electronic secure messaging and those that are still "manual" (fax, hand to patient).
- There is no install or setup required the service is fully live now from the HealthLink Smartforms page in Genie.
- You can see the delivery status of all electronic referrals in Genie.
- We welcome your feedback and suggestions for future improvements to this service.

# SR Specialists & Referrals



# Part 1: Receiving SR Referrals

### 1 Finding Your SR Referrals in Genie

#### 1.1 Open Incoming Letters

烤 Genie						
File Edi	t Ope	n Records	Billing	Patients	Special	Help
Patient Patients Ctrl+O						
	-	Appointments Ctrl+J				
	4	Address Book Ctrl+B				8 🌑
Su	Configure Healthlink DOB			DOB		
PATIEN	1	Outgoing Letters 20/12/11			20/12/11	
		Incoming Letters				
	Correspondence Log					

1.2 Then Double click on the Referral to open it

. 🔊	li 🔍	Doctor: All	V Linked?: Unlinked	$\sim$	
Date	Surname	First Name	Sender	Addressee	
03/05/2021	Anderson	David	Test Referral	Ear Lobe	
03/05/2021	Patient	Test	Test Referral	Far Lobe	

# 2 Linking a Referral to an Existing Patient

If the Patient exists in your database you can link the referral to the existing patient record.

The green equals sign shows the referral information matches with a patient record.

🖄 Number 2 of 2 letters				
Test PATIENT 20/12/11	tr PATIENT 20/12/2011 3500 26512 1 Match Find Link Llokek New Cin Edit Print Link the result to the patient (Cmd/Ctrl + 1)			
Date: 3/05/2021	Sender:     Test Referral     Linked By:       Addressee:     Ear Lobe     File Name: (phallref)SR-29295.hl7			
File Edit Image View				
	Referral to Dr Ear Lobe This address is for e-refer testing: Genie, Lvl 19, 9 Castlereagh St, Sydney NSW 2000, Sydney, 2000, Ph:1300 145 465 Referral number: SR-29299			

# 3 Creating New Patient from a Referral

If the patient is not in your database, then the red equals signs show the referral information does not match an existing patient. Click on the New button to create a patient record from the referral letter and then link the referral to the patient record.

🗏 Number 1 of 1 letters	😢 Number 1 of 1 letters
David Anderson 04/01/55 Match Find Lin Unlink New Add a ew patient record (Cmd/Ctrl + N)   Date: 2005/2021 Sender: Text Deformal	David Anderson 04/01/1955 04/01/1955 04/01/1955 04/01/1955 04/01/1955 04/01/1955 04/01/1955 04/01/1955 04/01/1955
Value         Schuel:         Test Reterior         Linkev or           Addressee         File Name: (ghallref)SR-29299.ht7         File Name: (ghallref)SR-29299.ht7           File         Edit         Image         View	Date:         [3/05/2021]         Sender:         Test Referral         Linked By:           Addressee:         Ear Lobe         File Name:         (phallref)SR-29299.ht/7
	File Edit Image View

# 4 Finding Linked Referrals

ncoming Letters: 6 of 6 Records - Current User: Doctor				
Date     Surname     First Name     Sender     Addressee				
03/05/2021	Test	Patient	Test Referral	Ear Lobe
02/05/2021	Anderson	David	Test Referral	Ear Lobe
03/03/2021				

- Once the referral has been linked it will not be visible in 'Incoming Letters' by default
- Select 'Linked' from the drop down menu to view linked referrals





### Part 2: Sending SR Referrals

### 1 Making a SR referral in Genie

#### 1.1 Open the Patient Record and HealthLink Forms Window

From within the patient clinical record in Genie, from the menu select **Tools** then **HealthLink Online**. Then select New to open the Healthlink Forms Page.



#### 1.2 Open SR Specialists & Referrals

Specialist Referral

15/02/2022 10:24:37

Under the Search a Private Specialist section, click on For Private Specialist Referrals.

Dr Test Referrals

SR-60331

text/html

R

🌾 File Window Help	
HealthLink connecting with care	1800 125 036 (AUS) Contact Us helpdesk@healthlink.net
Search a Private Specialist or Allied He	ealth Provider to Refer Patient
SR Specialists & Referrals For Private Specialist R	eferrals
Referred Services	
Austin Health	Banyule Community Health
Chris O'Brien Lifehouse Services	DPV Community Health

New

View

Delete

Edit Preferences...

Status

Form Submitted

Form Submitted

Unknown



# 2. Select the Specialist to Refer to

#### 2.1 Search By Name

Type in the Specialists Name and click **Search Specialists**. The specialist will come up along with other profiled suggestions. Just click on the name to view the full specialist profile.

#### 2.2 Search by Category and Location

You can select a category for your search by clicking on the select a category box. If the category is not in the drop down list, just enter the keywords and the category will come up. Once you have entered the information you require, click on the search button. You can also add a suburb or postcode to make it closer to your patient's location.



#### 2.3 View Specialist Profile

Here you can read about the specialist and decide on the appropriateness for your patient.





# 3. Email Patient the Specialist's Profile

Click on Email Patient, then type in your patient's email address and click Send Email.

Specialists & Referrals		ABOUT HELP LISTS Q	Email Specialist Profile to Patient	
Main Search / Obstetrics & Gynaeco	Iogy Related / Wantima Vic 3152 / Hema Grover Hema Grover Fertility & Reproductive Medicine   Gynaecology   Obstetrics & Gynaecology Mitcham, Wantima, Lilydale About Services Credentials Contact Info	Add to frequently used     Add to frequently used     E mail Patient     A Print Patient Handout     Report An Update	You can email this Specialist Profile to your patient. The email will be sent from Specialists & Referrals Server, not from your local mail packa Enter Patient's email SEND EMAIL	

We manage the email process so when your patient receives the email, it will say it is from SR Specialists and Referrals, keeping your email address private. The patient will be able to view the Specialist's profile through the website aushealthpages.com.au. The patient will now have the specialist's details in case they misplace the referral, and with those details it is simpler for them to call the specialist to make their appointment. If your patient is unsure who they want to see, you can email multiple specialists' profiles to them so they can decide who they would feel more comfortable with.

Your patient can view all the information you see regarding the specialist, their services, qualifications and experience – and then your patient can just click to call and book their appointment.

You can also click **Print Patient Handout** (link under Email Patient) to print off the specialist profile for your patient.



# 4. Select the Referral Location – E-Refer or Manual Refer

You can send the E-Referral to the practice, or to a particular specialist at one of their consult locations. If the E-Refer button is not displaying for the organisation, then the profile page will list all the specialists working there. Click on a specialist name to send the referral to the specific specialist at the organisation.

Hover over the red **E-REFER** or grey **MANUAL REFER** button to the right of the specialist's page. A dropdown list of locations will display for you to choose from. Choose a location showing in red to send a referral electronically. You can complete the smartform referral and it will be saved in the patient record. A location will show in grey if electronic messaging has not been set up there. It is exactly the same process to complete the manual SR referral, but the referral must be printed out and faxed or given to the patient. The manual referral will still be saved into the patient record, including a message that it has not been sent electronically. You cannot add attachments to manual referrals.

Dr Andrew Atkins	₽ <u>E-REFER</u>
Ophthalmology	CHOOSE LOCATION
Printon East Ecotscray Shennarton	BRIGHTON EAST
·	FOOTSCRAY
	MANUAL REFER: SHEPPARTON
About Contact Info	



# 5. Complete the Referral Form

The form will be displayed. You will have access to all the information necessary to complete the form for submission. Work through the six tabs down the screen starting with **Requested Information**.

Sile Window Help							_
SR Specialists & Referrals	Referral to Dr Ear Lobe						
Requested Information	Name	Ear Lobe					
Specialist Relenal	Phone	1300 145 465					
Attachments / Peports	Street Address	This address is for e-refer te	ting 3: Portal, 9 Ca	stlereagh St, Syd	iney NSW 2000		
No reports selected No files attached	Suburb	Sydney					The Peacon for Patient
	Post Code	2000					
Medications, Allergies, Alerts / Warnings 2 long term medications specified No medications specified 2 medical warnings specified	Referral Date* Referral Continuation* Referral Period*	01/12/2021 • New O	Continuation				information – type into
Medical, Social and Family History Medical history specified	Feedback Requested* Interpreter Required* Urgent	Yes     No     Yes     No					consultation notes and select the appropriate notes to
Patient Information Test Patient 123456789 20/12/1950	Reason for Patient Referre	al* Browse for Consultation Notes					Attach. You may specify the referral
Referrer information Test Referral 0000000Y	Additional Information (for	example current services)	tick the urgent box and give a reason.				
	Measurement Details						
	Date Co	de Value	Date	Code	Value	1	
	22/06/2021 Height	100	22/06/2021	BMI	25.0	]	
	22/06/2021 Weight	25	11/11/2021	BP	150/90		

# 6. Include Attachments

The Attachments / Reports tab will give you access to the supporting pathology, radiology or other documents you need to attach to the form. Select an attachment from the table – this table shows attachments in your patient's record from the last six months. If you want to attach an older document, choose **Browse for Patient Document** and set an earlier date.

You can also attach records from your computer by choosing Browse for Local File.

The SR form supports documents in the doc, docx, gif, htm, html, jpeg, jpg, rtf, tif, tff & txt formats. You can preview the document before attaching it by clicking the computer icon to the right.

specialist Referral	$\bigcirc$	Form has	been auto-saved.				
$\frown$							
ttachments / Reports	Diagno	ostic Reports /	Patient Documents	Browse for Patient Docum	ent Brov	/se for L <u>o</u> cal F	ile
o files attached	Attach	file from EMR s	supports: doc, docx, gif, html, jpeg, p	df, txt, rtf <mark>,</mark> tiff			
	Attach	lile from Comp	uter supports mes that end in types. (	Caution: larger attachments	por, ru, ur, un, un may take signifi	cant time to p	review
Medications, Allergies, Alerts / <u>Warnings</u> No long term medications specified		Date -	Name	Comments	Туре	Size	
		20/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	24 KB	
lo medical warnings specified		17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	22 KB	E
edical, Social and Family		17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	23 KB	E
listory edical history specified		17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	22 KB	E
		13/04/2021	IRON BLOOD TEST RESULTS	IRON TEST	rtf	5 KB	E
atient Information		13/04/2021	FULL BLOOD COUNT	TEST RESULTS	rtf	3 KB	E
Test Patient 3500265121 1		13/04/2021	XRAY		jpeg	60 KB	E
est Patient 500265121 1 0/12/2011							



# 7. Medications, Warnings and Medical History

These tabs are pre-populated with data from the patient's medical record. All medications are shown, and you have to remove them if you think they are unnecessary or sensitive in nature.

To remove a current or long-term medication from the referral (not the medical record), click the cross on the right-hand side of the item you wish to remove. You may also add further detail in the comments sections.

Requested Information A Specialist Referral	Current	Medications							
	Date	•	Details	Dose	Units	Instructions	4		
	1	RAMIPRIL (R	lamipril)			Dosage: daily Qty:30	×		
Attachments / Reports		LIPITOR (Ato	rvastatin (as calcium))			Dosage: 1 daily Qty:30	×		
	Past Re	levant Medicatio	Details	Pose	Lloita	Instructions			
Medications, Allergies, Alerts / Warnings 2 long term medications specified No medications specified 2 medical warnings specified	Date	Date - Details			Units	Instructions	4		
	No records found.								
	Allergies and Alerts								
		Date - Des				Comments			
Medical, Social and Family History	•	11/11/2021	FIBRATES						
fedical history specified	•	NaN/NaN/NaN	Allergy to Fibrates						
Patient Information	Clinical	Medication Con	Allergy to Fibrates						

Requested Information A Specialist Referral	Long Terr	n Classifications	s (Co-Morbidities)					
		Code	Description	Comments				
			Psoriasis					
Attachments / Reports			Diabetes Mellitus - Type II					
No files attached			Hyperlipidaemia					
			Hypertension					
Medications, Allergies, Alerts / Warnings 2 long term medications specified No medications specified	Patient History							
		Code	Description	Comments				
2 mourou wuminga apoonou			Has been a well known celebrity.					
Medical, Social and Family History	Family History							
Medical history specified		Code	Description	Comments				
			Father had diabetes					
Patient Information Test Patient 123456789 20/12/1950 Referrer Information	Smoking Smoking s	History and Add tatus: Ex-smoker	itional Information ; Frequency: ; No. of cigarettes: 1; Year commenced: 20	00; Last quit attempt: Never/Unknown				



# 8. Check Patient and Referrer Information

With the **Patient Information** and **Referrer Details** tabs, you simply need to ensure that the information is correct. The form will ask you to complete any missing information before it can be sent.

Sile Window Help			C File Window Help						
SR Specialists & Referrals	Referral to Dr EarLobe		SR Specialists & Referrals	Referral to Dr Ear Lobe					
Requested Information A Specialist Referral	Form has been auto-saved.		Requested Information A Specialist Referral	Form has been auto-saved	d				
Attachments / Reports No reports selected No files attached	Patient Information Date of birth* 20/12/1950 III Medicare/DVA Eligible*	H	Attachments / Reports No reports selected No files attached	Medical Practitioner Information Medicare Provider Number*	Medical Registration Number				
Alerts / Warnings 2 long term medications specified No medications specified 2 medical warnings specified Medical Social and Family	Yes No  Medicare number*  3500265121  1  DVA number  123456789	Medicare expiry 30/11/2022 III Pension number 122456789	Medications, Allergies, Alerts / Warnings 2 long term medications specified No medications specified 2 medicati warnings specified	Name Full name Test Refen	al				
History Medical history specified	Private health fund name PEOPLECARE HEALTH IN Name*	Patient membership number 123456789	Medical, Social and Family History Medical history specified	Fast Referral  Practice name  Consider Media					
Patient Information	Test Patient			Practice Address					
123456789 20/12/1950 Referrer Information	Gender* Male V Residential Address	Patient's indigenous status* Neither Aboriginal nor Torres Strait Islander origin	Patient Information A Test Patient 123456789 20/12/1950	6 Murray St, Abbotsford, VIC, 3067  Practice telephone*	Practice fax				
Test Referral 0000000Y	> 123 Pitt Street, Sydney, NSW, 2000			1800 147 047					
	Postal Address		Test Referral 0000000Y	Email nicole@specialistsreferrals					
	Same as residential			ED!*					

# 9. Submit the Form

**Submit** sends the electronic referral to the specialist. This referral is securely encrypted and delivered by HealthLink.

**Preview** allows you to look over the form before sending it. No attachments will be visible on Previewed referrals but they will be included on the referral delivered to the specialist.

**Park** allows you to complete the form and send it at a later date, if needed.

To send a parked or previewed referral click Submit.

All sent referrals will be copied into the patient record. You will also see the acknowledgement / referral status in the patient record.

#### 9.1 Completing Manual Referrals

For Manual Referrals the steps are almost the same except you cannot attach any results or X-rays, these need to be printed separately. At the end you will click **Print** instead of Submit, the referral will still save in that patient's file. Then you can either fax the referral or hand it to the patient to take with them.

#### 9.2 Print Referral

If needed, you can print a copy of the Referral by right-clicking on area of the submitted forms and choosing **Print**.

#### 9.3. Practice doing a Referral

We have set up a test specialist called Ear Lobe. Search for Ear Lobe and do a practice referral as many times as you like. We suggest you use a fake patient to practice this.









# 10. Managing Referrals

#### 10.1 Access Parked Referrals

To access a parked form from the patient's record, select **Tools** then **HealthLink Online**. From the list you will see the status for each form. Open the **Parked** form with a double click. You can also use this area to see previously submitted or parked/incomplete forms. The Recipient of all manual forms will show as **printfax** in the list.

烤 Genie	e									- 🗆 ×
File Edi	it Open Records Sp	ecial Help								
👋 Mr	🖄 HealthLink Online fo	or Mrs Patient Test								
03:34									Save	Appointments
54 yr:	Show: Parked							Edit Preferences		Patient List
Summa	Date/Time	Description	Mode	View Type	Provider	Msg Control Id	Status	New		Clinical-Patient Test
ALLER	24/03/2022 07:48:04	Specialist Referral	P		Dr Test Referrals	SR-65880	Unknown	∧ Resume		HealthLink Online-Patient
Peanu								View	P	Results to Review
										Letters to Review
								Delete		
									its ils	
									NIZOT	
									NZST	
1										
8 cont										
All S										
6										
2										
5								~		
ا چ	<							>		
2	Created on:	24/03/2022 at 07:48:0	4							
	Last Updated on:	24/03/2022 at 07:48:0	4							
	Description:	Specialist Referral								
	Save Mode:	Parked								

#### **10.2 Accessing Submitted Referrals**

A copy of the submitted referral can be found in the **Notes** section of the patient's clinical record. Double clicking on the form will open it.

The preview will include a list of any attachments. The actual attachments are included in the referral sent to the specialist.

📌 Genie			- 🗆 🗙
File Edit Open Tools Special Help			
Mr Test Patient, (20/12/2000) 12 Disney Street Disneyland (H: 1234567	8) - Current User Doctor		
06:45 🧕 🔬 🖉 🥔 🎯 🕵 🖨 🖽 🗬 🖬	Add Cons Edit Cons	Marked Cancel Save	Appointments
Sumpary Notes Chec lists/Script Archive Obstetric Hx Social		Dr Ear Lobe (Usual GP+Ref:4/05/2021) V	Clinical- Test Patient
ALLERGIES V PAST HISTORY V		Aa	Results to Review
bee sting	^	_^	Letters to Review
latex		Referral Sent and Acknowledged on 04/03/2022 13:47 NZDT	
		Referral to Dr Jothi Murugesan	
		Leppington: Unit 2, Emerald Hills Medical Ctr, 5 Emerald Hills Blvd, Leppington NSW 2179, Leppington, 2179, Ph:02 8355 1891	
~	~	Referral number: SR-63022 Referral date: 04/03/2022 13:47 NZDT	
(i) 1 4. pit 5 hi7	CDM Summary	Patient: Test Patient, 21yrs, M, DOB 20/12/2000, PH: 12345678	
Last 10 Consults		Residential address: 12 Disney Street, Disneyland, Vic	
174 contacts		Referred by: Test Referrals, Specialists & Referrals NSW Prov. No. 0123456K, PH 1800 147 047, FAX 1800 :	
All 🤮 🧷 🖋 👰 🏂 🗐 🌪 💙 📰 🥞 🤜 🖋	Reset	029	
Date Provider Info	Title		
04/03/2022 Doctor text/html	Specialist Referral [R]	Clinical Referral Information	
03/03/2022 Doctor text/html	Specialist Referral [R]		
02/03/2022 Doctor text/html	Specialist Referral [R]	Referral Date: 04/03/2022	
01/03/2022 Doctor text/html	Specialist Referral [R]	Referral Continuation: New	
20/02/2022 Doctor text/html	Specialist Referral [R]	Referral Period: 12 months	
22/02/2022 Doctor Acknowledged	Ear Lobe	Feedback Requested: Yes	



#### 10.3 Checking the Delivery Status of Electronic Referrals

This is how to check the status of electronic referrals you have sent. ACK referrals with a tick have been successfully delivered into the receiver's software. Referrals that haven't been received by the specialist's software will be shown without a tick.



1 Close out of the patient record and go to **Open** then choose **Correspondence Log**. This will open a list of all eReferrals to follow up, showing electronic referrals that are still waiting for acknowledgement.

Octile											
File Edit Ope	n Fecord	s Spe	cial Help								
1 Corresponde	ancelog						8			83	
	chec cog										Anneintmente
. 💿 🤉	👻 🛍	de	This machine is set to ex	port letters for Healt	hlink and HealthlinkLab2				Cancel Save	e -	Commentered
view all	N/ Ш	V				Configure Healthlink		Dr Ear Lobe (Usual GP+Ref:4/05/2021)	~	::	Correspondence Log
Sent Received	Error Log	)							la l	1	Clinical root rationt
Dete			Detiont	T	<b>T</b> -	Constant		A			Results to Review
Date	Time	ACK	ratient	Type	10	Carrier					Letters to Review
4/03/2022	13:48	$\checkmark$	Test Patient	REF	Specialist Referral	Healthlink	^				
3/03/2022	14:56	$\checkmark$	Test Patient	REF	Specialist Referral	Healthlink		NOT BE SAVED.			
2/03/2022	14:74	$\checkmark$	Test Patient	REF	Specialist Referral	Healthlink					
1/03/2022	16: 0	$\checkmark$	Teat Patient	REF	Specialist Referral	Healthlink					
28/02/2022	16: 16	$\checkmark$	Teet Patient	REF	Specialist Referral	Healthlink					
23/02/2022	21:11		Teet Patient	REF	Specialist Referral	Healthlink					
22/02/2022	12:16		Teut Patient	REF	Mouse, Mickey	Healthlink					
21/02/2022	13:25		Test Patient	REF	Specialist Referral	Healthlink					
18/02/2022	14:0-	$\checkmark$	Test Patient	REF	Specialist Referral	Healthlink					
15/02/2022	14:17		est Patient	REF	Specialist Referral	Healthlink					
15/02/2022	14:07		Test Patient	REF	Specialist Referral	Healthlink					
15/02/2022	10:24		Test Patient	REF	Specialist Referral	Healthlink					
14/02/2022	11:15		Test Patient	RFF	Specialist Referral	Healthlink					
11/02/2022	13:46		Test Patient	REE	Specialist Referral	Healthlink					
11/02/2022	13:45		Teet Patient	DEE	Specialist Referral	Healthlink					
10/02/2022	15,70		Tast Patient	DEE	Specialist Referral	Healthlink					

If you want to see all electronic referrals that have an error, click the Error Log tab

#### Support Queries

SR Support can help with any referral tracking queries using the Referral ID 'SR-XXXX'. All patient data is confidential and only visible to the sender and receiver. Find the referral ID in the individual patient record. Please contact SR Support on 1800 147 047 or email sr-support@specialistsreferrals.com.au for:

- specialist contact details and address updates
- queries on receiving electronic referrals
- queries on sending electronic referrals
- to receive a test referral
- for additional staff training