QUICK START GUIDE

SR SPECIALISTS & REFERRAL SMARTFORM - MEDICAL DIRECTOR

The SR Specialists & Referral Smartform has been designed to make it easier for you to refer your patients electronically to private specialists. This quick start guide has been developed to help you navigate the new digital form in **Medical Director**.

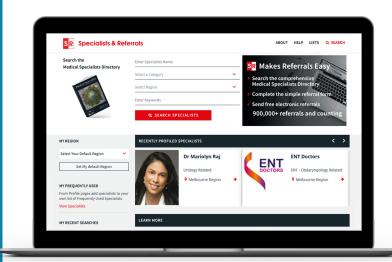
SR Support

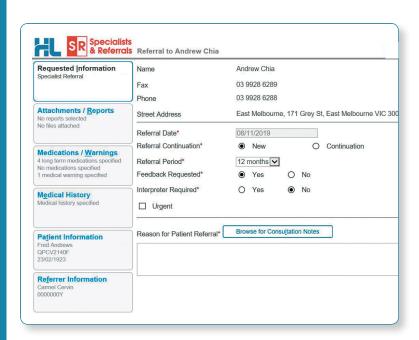
1800 147 047

specialistsreferrals.com.au

sr-support@specialistsreferrals.com.au













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 Specialists & Referrals is a collaboration between the Medical Specialists Directory published by Cervin Media and HealthLink.
- You can 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 Medical Director.
- The referral is stored in the patient record.
- The SR HealthLink Smartform is similar to other HealthLink smartforms.
- There is no cost for GP Practices to use this service. Specialists can also have a free account to receive SR HealthLink referrals. The majority of specialists are already setup for secure messaging and more are registering daily.
- Specialist information and referral locations are updated daily by the SR team.
- You can see the delivery status of all electronic referrals in Medical Director.
- Sending SR referrals to private specialists will assist your practice to be fully compliant with the eHealth PIP.
- We welcome your feedback and suggestions for future improvements to this service.

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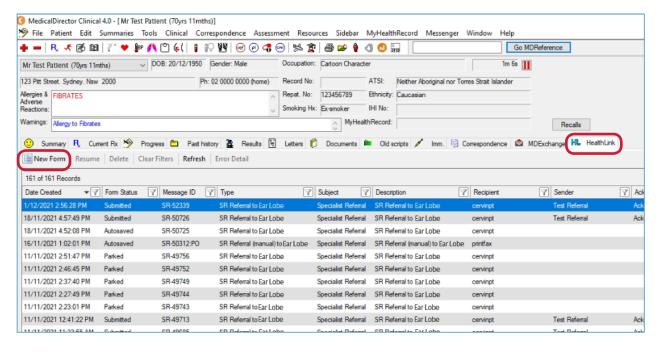




1 Patient Record and HealthLink Forms

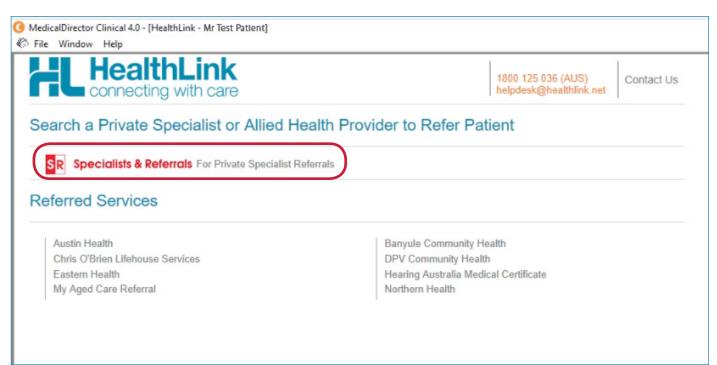
1.1 Open the Patient Record and HealthLink Forms Window

From within the patient clinical record in Medical Director, click on the HealthLink tab and then New Form.



1.2 Open SR Specialists & Referrals

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







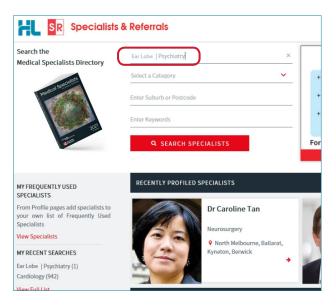
2. Select the Specialist to Refer to

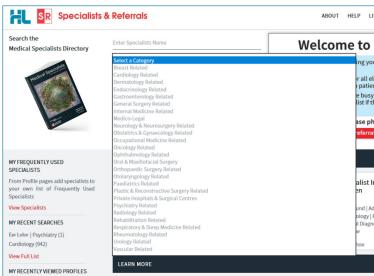
2.1 Search By Name

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

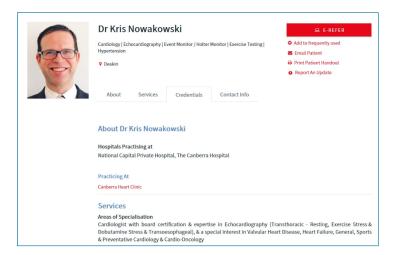
You can select a category for your search by clicking on the select a category box. If the category is not in the drop down list, just enter the keywords and the category will come up. Once you have entered the information you require, click on the search button. You can also add a suburb or postcode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

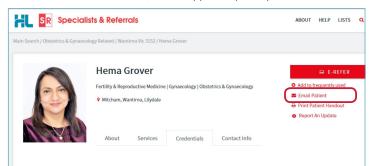






3. Email Patient the Specialist's Profile

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





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.

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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 drop-down 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.

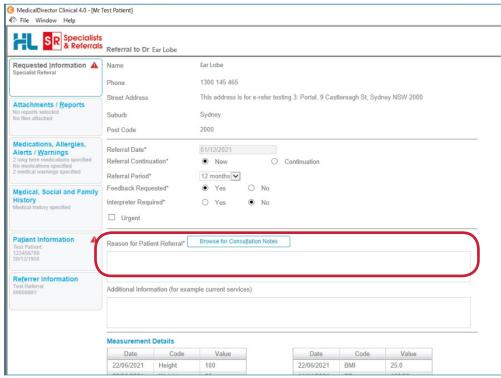






5. Complete the Referral Form

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**.



The Reason for Patient
Referral is required
information – type into
this field or Browse your
consultation notes and select
the appropriate notes to
attach.

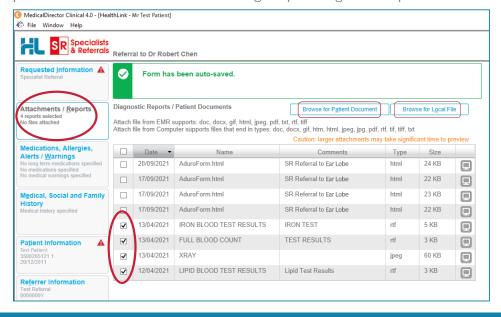
You may specify the referral period. If the referral is urgent tick the urgent box and give a reason.

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.



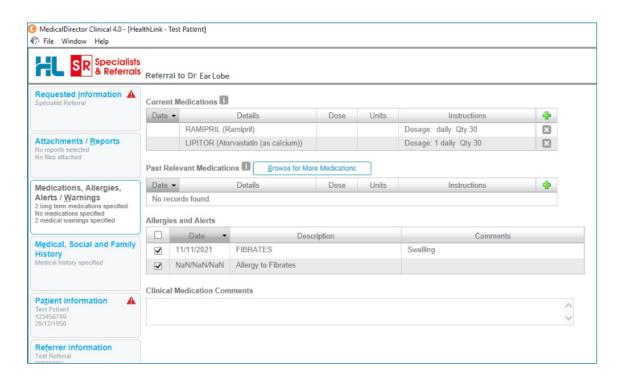


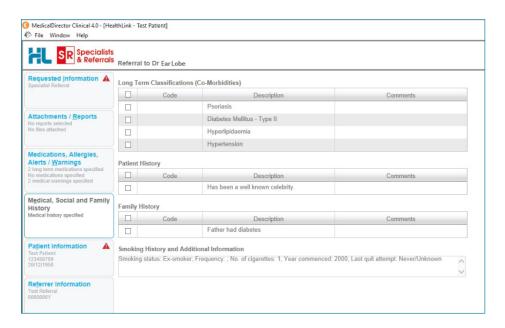


7. Medications, Warnings and Medical History

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.



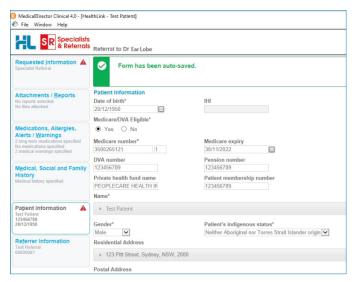


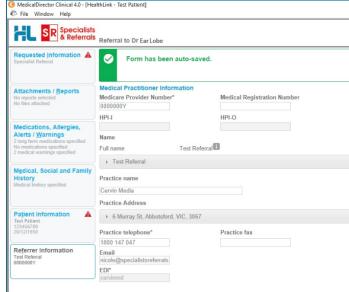




8. Check Patient and Referrer Information

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.





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

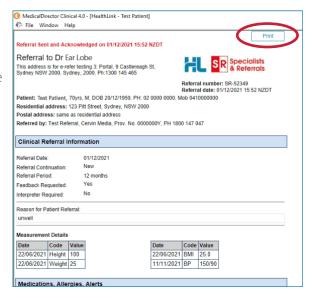
For Manual Referrals the steps are almost the same except you cannot attach any results or X-rays, these need to be printed separately. At the end you will click **Print** instead of Submit, the referral will still save in that patient's file. Then you can either fax the referral or hand it to the patient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



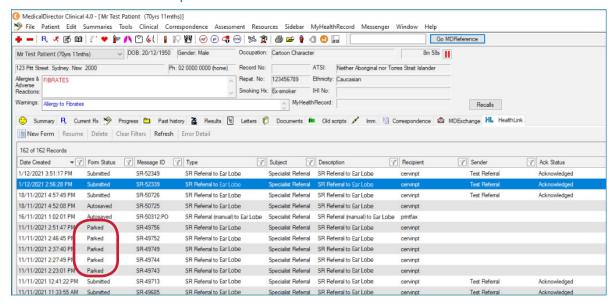




10. Managing Referrals

10.1 Access Parked Referrals

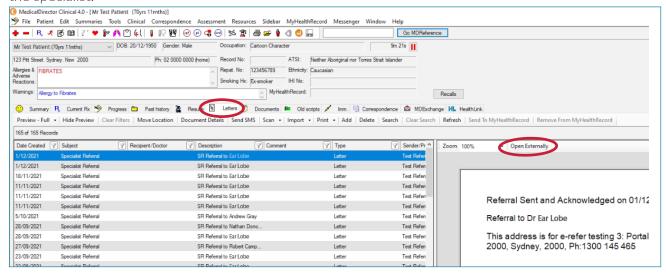
To access a parked form from the patient's record, select the **HealthLink** tab on the right hand side of the clinical record screen. From the list you will see the status for each form. Open the **Parked** form with a double click. You can also use this area to see previously submitted or parked/incomplete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



10.2 Accessing Submitted Referrals

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

To open the referral as the specialist sees it, click the **Open Externally** button on the summary preview screen. The preview will include a list of any attachments. The actual attachments are included in the referral sent to the specialist.

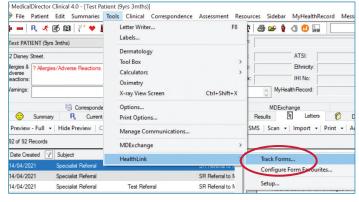




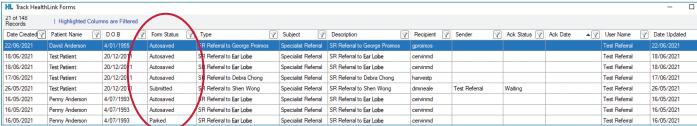


10.3 Checking the Delivery Status of Electronic Referrals

This is how to check the status of electronic referrals you have sent. **Acknowledged** referrals have been successfully delivered into the receiver's software. Referrals that haven't been received by the specialist's software will be shown as **Waiting**.



1 First, go to Tools then HealthLink then Track Forms.

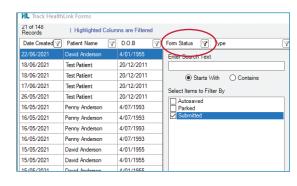


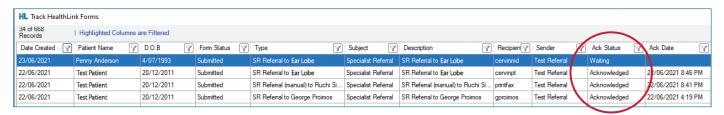
- 2 Track Forms will show all electronic referrals including draft referrals. Parked and Autosaved referrals have been put on hold and need to be finished and submitted.
- **3** Find all your submitted forms only. Click **Show All** to show all referrals including acknowledged referrals.



Click the filter icon next to **Form Status**. Filter for submitted referrals only and select **OK**.

This will now only show the referrals that have been sent.





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. For all queries please contact SR Support on 1800 147 047 or email sr-support@specialistsreferrals.com.au.