# Health Certainty in Care Creating and Sending Letters and Referrals

There are quick and easy ways for you to save time using your EMR software. This guide shows you how to create and send letters and referrals



You can look up a Specialist or GP messaging address as well as update your practice details on the HealthLink User Directory addess below. If you require access to the HealthLink User Directory, please contact HealthLink on 1800 125 036

Directory: https://secure.hlink.net.au/directory/login.php

# Before You Begin

Each Specialist or GP that you wish to send referrals to needs to have an address book entry with a MDX Facility ID in Medical Director Systems. In the Address Book a site has a facility ID if there is an site is an site has a facility in the address details.

You will need to be registered to use MDExchange with Medical Director. You will also need to check that your registration includes being able to send. To check:

a) Select TOOLS> MDEXCHANGE> LICENCE DETAILS

Exchange Manag	jement			
Status: 📿	egistered	•		
Practice Details				
Practice ID:	55921			
Practice Name:	Informatix Australia			
Facility ID:	MDX3160A			
Licence Details	VQQ - 2VRD		QPFX · ZV1A · P2	Validate
Product		Expiry	Send / Recieve	
MDExchange		5/04/2017	Send/Receive	

If the status does not show as registered or shows "receive" only you will need to follow the on screen registration instructions or contact MedicalDirector.

# Creating a New Referral/Letter

a) Select PATIENT> OPEN (F2)

😹 Me	MedicalDirector Clinical 3.16a									
Open	File	Patient	User	Tools	Clinical	Correspondence	Search	Resources	Sidebar	Help
		Open			F2	2				
		List	6		F1	0				
		Waitir	ng Roo	m						
		Add				•				

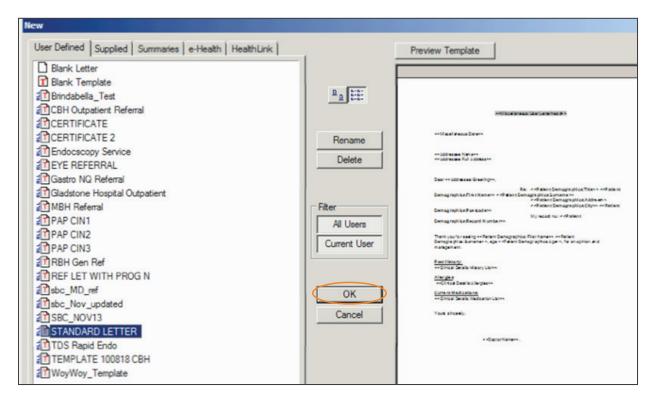
b) Search for the patient you wish to send the referral/Letter for

c) Highlight patient and select OK

93	Enter patient suman	ne, chart nun	nber or phon	e number		Include inactiv Include Next o Search on cha	f Kin and Emergency Contact at number
Name		Age	Gender	Chart Number	Address		Phone Number
Dummy, Pat	tient	66 yrs	F		1 Smith St. Smithto	own 2440	
Status: Act	tive	0	ĸ	Add Ne	ew Delete	Edit	Merge Close

d) Select TOOLS > LETTER WRITER(F8) or the Sicon e) Select FILE > NEW (Ctrl +N) or the Sicon

- MedicalDirector Clinical 3.16a [Letter Writer Patient Dummy] File Edit View Insert Format Table Window Help New... Ctrl+N 🖺 🗠 🖓 🥅 T 10 T Ê Modify Template... 12 New Roman U Save Ctrl+S Save as Template ... L Import... Export... . E-mail Dage Cebu
- f) Select the name of your required templates from any of the tabs and select OK.



g) Complete the letter/template as required e.g. adding the Addressee

h) Review your completed document. Any changes can be updated directly into the template.

### Sending Your Letter/ Referral

Once you have Finished making changes to the letter/ referral you can then send your message using MDExchange.

a) Click on FILE > SEND Via MDExhange or click on the [Section] icon located on the toolbar



b) Select TO...

MedicalDirector Clinical	3.16a - [	Letter V	
File Edit View Insert	Format	Table 1	
New Modify Template	Ctrl+N	26	
Save	Ctrl+S	Vew I	Send via MDExchange
Save as Template		12	Patient: PATIENT DUMMY
Import Export			From: Dr Medical Director
E-mail		•	To
Page Setup Print	Ctrl+P		Subject: PATIENT DUMMY
Preferences			Sign With Your default signing certificate
Close			Send As: Rich Text Format
Send via MDExchange.			Send to PCEHR     Preview     Send     Cancel
	Fie Edit View Insert New Modify Template Save Save as Template Import Export E-mail Page Setup Preferences Close	File       Edit       View       Insert       Format         New       Ctrl+N       Modify Template       Ctrl+N         Modify Template       Save       Ctrl+S         Save as Template       Import         Export       E-mail         Page Setup       Ctrl+P         Preferences       Herefore	New       Ctrl+N         Modify Template       New I         Save       Ctrl+S         Save as Template       I?         Import       Export         E-mail       I         Page Setup       Ctrl+P         Preferences       Ctrl+P

- c) Select the Address Book tab
- d) Enter the name of the Provider/Clinic. The sites information will be show
- e) Highlight the recipient and select To

Select MDExchange Recipients					×
Name: HealthLink Townsville	Practice Name:		Private Id:		
Category	City/Suburb:		Facility Id:		
PostCode:	Provider Number:		Search	Clear Filters	
Address Book Online Search Results					
MDX Name	MDX Address	Category	City/Suburb	PostCode	
🖆 HealthLink Townsville	HealthLink Townsville	General practice	North Ward	0000	
Recipients					
To ->					-
Cc ->					-
,					
			$\leq$	OK Cancel	

Please note if the sicon does not appear next to the Addressee you will need to add them in to the MDExchange Address book. You are unable to send to this site using HealthLink via MDExchange if the sicon does not appear next to the address.

f) The Addressee's details should appear in the Recipients To area g) Select OK

Recipients	
To -> HeathLink Townsvile; Cc ->	
	OK Cancel

h) In the Send as section select Plain Text

i) Select Send

If you wish to add a CC please do so before you select send. See instruction Adding a CC located in this quick guide.

Send via MDE	xchange
Patient:	PATIENT DUMMY
From:	Mr Lawrence Peterson
То	HealthLink Townsville:
Cc	
Subject:	PATIENT DUMMY
Sign With	Your default signing certificate
Send As:	Plain Text
E Send to P	CEHR Preview Send Cancel

You will see a bar showing the message being sent.

Once the message has been send you will be taken back to the Patients record and it will show the details of the under the Letters tab.

rieukaibirector ciinicai 3.1	6a - [Patient Dummy (66 yrs)]										
File Patient Edit Summarie	es Tools Clinical Correspondence Assessment	Resources Sideba	r PCEHR Wind	dow Help							
🕨 🗕   R. 🤜 🗭 🖽   🦉	💌 📴 🕺 🕄 📢 🔋 😰 📲 🐨 🗩	🦪 😔 🛸 🔶	i 😂 😫 🖠	a 🖊		G	MDReference				
PATIENT DUMMY (66 yrs)	DOB: 01/01/1950 Gender: Female	Occupation:				1h 0m 53					
Smith St. Smithtown. New 2440	Ph:	Record No:		ATSI:							Phot
Nergies & ? Allergies/Adverse Re Adverse	sactions	Pension No:		Ethnicity:							
Reactions		_   Smoking Htc	7 Smoker	IHI No:							-
Warnings:			a service and	PCEHR:	IHI not recorded as of	06/06/2016	Re	cals			
Summary   R, Current Rx	🌮 Progress 🛍 Past history 📓 Result		nents   🖿 Old s	cripts   🖋	Imm.   🖓 Pap Test	🖉 Obstetric 🛛	Correspondence	MDExchar			
Summary   R. Current Rx   Preview - Full      Hide Preview			nents   🖿 Old s	cripts   🖋	Imm.   🖓 Pap Test	🖉 Obstetric 🛛	Correspondence	MDExchar		m PCEHR	elec
Summary   R, Current Rx	Clear Filters   Move Location   Document Deta		nents   🖿 Old s	cripts   🖍 •   Print •	Imm.   🖓 Pap Test	🛃 Obstetric   🚦 earch   Clear Searc	Correspondence	MDExchar	Remove Fro	m PCEHR	elec

# Adding a CC

a) Select CC...

Send via MDE	xchange
Patient:	PATIENT DUMMY
From:	Mr Lawrence Peterson
То	HealthLink Townsville:
Cc	
Subject:	PATIENT DUMMY
Sign With	Your default signing certificate
Send As:	Plain Text
🔲 Send to P	CEHR Preview Send Cancel

b) Select the ADDRESS BOOK tab

c) Enter the name of the Provider/Clinic. The sites information will be shown

d) Highlight the recipient and select CC

Select MDExchange Recipients					×
Name: HealthLink Townsville	Practice Name:		Private Id:		
Category	City/Suburb:		Facility Id:		
PostCode:	Provider Number:		Search	Clear Filters	
Address Book Online Search Results					
MDX Name	MDX Address	Category	City/Suburb	PostCode	
🖆 HealthLink Townsville	HealthLink Townsville	General practice	North Ward	0000	
Recipients					
To ->					
(- 2)					
				ок С	ancel

Please note if the icon does not appear next to the Addressee you will need to add them in to the MDExchange Address book. You are unable to send to this site using HealthLink via MDExchange if the icon does not appear next to the address.

e) The Addressee's details should appear in the Recipients Cc area

f) Select OK

You are able to add more than one CC by repeating steps b - d.

Recipients	
To -> HealthLink Townsville:	
Cc -> Informatix Australia:	
	OK Cancel

a) Select SEND

Send via MDE	xchange
Patient:	PATIENT DUMMY
From:	Mr Lawrence Peterson
То	HealthLink Townsville:
Cc	Informatix Australia;
Subject:	PATIENT DUMMY
Sign With	Your default signing certificate
Send As:	Plain Text
E Send to P	CEHR Preview Send Cancel

You will see a bar showing the message being sent.

Once the message has been sent you will be taken back to the Patients record and it will show the details of the under the Letters tab.

MedicalDirector Clinical 3.16a - [Patient Di	ımmy (66 yrs)]						
Note: Patient Edit Summaries Tools Clinica	I Correspondence Assessment I	Resources Sideba	ar PCEHR Window	Help			
🛊 🗕 🖻 🛠 🗷 🖾 🖉 🗰 🥀 🕻	2 📢 🔋 😰 😻 🞯 🗩 <	1 🖂 😒 😰	i 😂 📂 🛊 🕅 🗖		Go MDReference	]	
PATIENT DUMMY (66 yrs)   DOI	3: 01/01/1950 Gender: Female	Occupation:			1h 0m 53s		
1 Smith St. Smithtown. New 2440	Ph:	Record No:	ATSI				No Photo
Allergies & ? Allergies/Adverse Reactions		Pension No:	Ethni	city:			
Adverse Reactions		- Smoking Ho	? Smoker IHI N	o:			
Warnings:			PCE	IR: IHI not recorded as of	06/06/2016	Recalls	
🙂 Summary   🥂 Current Rix   🄊 Progress   🕻	Past history 👔 Results 🚺 L	etters 2 Docur	ments i Old scripts	🖋 Imm. 🛛 🖓 Pap Test	Distetric Correspondence	MDExchange	L HealthLink
Preview - Full •   Hide Preview   Clear Filters	Move Location Document Details	Send SMS Sc	can •   Import •   Pri	nt • Add Delete S	earch   Clear Search   Refresh   S	end To PCEHR   Remov	e From PCEHR
1 of 1 Records							Select Al
Date Created Y Subject Y	Recipient/Doctor 7 Des	cription	Comment	Type	Sender/Provider	Notation	Date Checked
6/06/2016 PATIENT DUMMY	HEALTHLINK TOWNSVILLE			Letter	Mr Lawrence Pete	non	

### Tracking Sent Messages

It is Important if you are sending referrals or any other types of messages, to check that they are actually being received by the recipient.

Once you have sent a message, the recipient's system will inform you, by way of an acknowledgement. There are 2 ways of viewing a status of a patient's e-referrals.

a) Select TOOLS > MDExchange > SENT Items

Me	dical	Director	Clinica	al 3.16a						
Open	File	Patient	User	Tools	Clinical	Correspondence	Search	Resources	Sidebar	Help
				100000	ter Writer els	·		F8		
				X-ra	y View S	creen		Ctrl+Shift	t+X	
				Calc	culators				•	
				Med	licare Au	stralia PKI Certifica	te Manag	er		
				Opt	ions					
				Prin	t Options	h				
				Man	age Com	munications				
				MDE	Exchange	:			•	Registration Wizard
				Pati	ent Phot	o Options				License Details
				Hea	HealthLink					Setup User Profiles
									_	Security
									_	Proxy Server Setup
										Sent Items

This will show the status of all Messages sent including CC's. You are able to use the filters to make a more individualised search

MDExchange Outbox							
All Messages		All Practitioners     All Patients		• (i) (A)			
To	From	Patient	Subject	Sent	Status	Sender	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT DUMMY	06/06/2016 1:47 PM	Accepted	Mr Lawrence Peterson	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT DUMMY	06/06/2016 1:48 PM	Accepted	Mr Lawrence Peterson	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT DUMMY	06/06/2016 2:37 PM	Transferred to Healt	Mr Lawrence Peterson	
Informatix Australia	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT DUMMY	06/06/2016 2:37 PM	Transferred to Healt	Mr Lawrence Peterson	

b) Within the patient file select the MDExchange tab. This will show only the OPEN patients e-referrals. This will show the status of the messages sent including any CC's

MedicalDirector Clinical	3.16a - [Patient Dummy (66	yrs)]								
🄊 File Patient Edit Summ	naries Tools Clinical Correspo	ondence Assessment Reso	urces Sideba	r PCEHR V	Vindow Help					
💠 💻 🥄 ⊀ 🗭 🕮	🦉 🎔 🕼 🖄 🌾 👔	😰 😻   🎯 🕑 🦪 🤅	9 😒 😰	6 🛩 🕯	题 🗾	[	Go MDRefere	nce		
PATIENT DUMMY (66 yrs)	▼ DOB: 01/01/19	50 Gender: Female	Occupation:				27m 31s			
1 Smith St. Smithtown. New 24	440	Ph:	Record No:		ATSI:					ho Photo
Allergies & ? Allergies/Adverse Adverse	e Reactions	*	Pension No:		Ethnicity:					
Reactions		*	Smoking Htc	? Smoker	IHI No:					
Warnings:					PCEHR:	IHI not recorded as of 0	5/06/2016	Recalls		
🙂 Summary   🥄 Current F	Rg 🦻 Progress 🗀 Past hist	ory   🖀 Results   🗈 Letter	s   🜔 Docur	nents 🛍 Q	ld scripts	Imm. 9 Pap Test	🖉 Obstetric   🎯 Correspon	idence 🖉 N	IDExchange HL He	sthling
Al Messages • L	ast Month • All Recipients	<ul> <li>All Practiti</li> </ul>	oners	81	(i) (i) (ii)	8 🗶 🙈				
To	From	Patient	Subject			Sent	Status	Se	nder	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT	DUMMY		06/06/2016 1:47 PM	Accepted	Mr	Lawrence Peterson	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT	DUMMY		06/06/2016 1:48 PM	Accepted	Mr	Lawrence Peterson	
HealthLink Townsville	Mr Lawrence Peterson	PATIENT DUMMY	PATIENT	DUMMY		06/06/2016 2:37 PM	Transferred to	o Healt Mr	Lawrence Peterson	

# The Status of the Referral Sent will be Updated as Follows

STATUS	MESSAGE PROGRESS					
Awaiting Transmission	The message is sent the the practice server					
Sent	Referral is sent from your practice server to the MDExchage server					
Transferred to HealthLink	Referral is sent from MDExchange to HealthLink					
Accepted	The Provider/ Clinic has successfully received received your referral					
Failed Transfering to HealthLink	Connection between MDExchange & HealthLink Unsuccessful. Please contact HealthLink for further assistance.					
Rejected by HealthLink	Incorrect EDI Address/ Message failed HealthLink validation. Contact HealthLink for further assistance.					

# For all queries, please call the HealthLink Customer Support Line:

Monday to Friday (except public holidays) 8am- 6pm Phone 1800 125 036 Support email: helpdesk@healthlink.net