HealthLink

User Guide
12.10.2023-SF-SP

HealthLink SmartForms for Shexie Platinum

Enables any healthcare provider to electronically refer a patient to any other healthcare provider or related service.

All sites must be running SHEXIE 7.0 or greater to get ACKS for both RSD & LAB messages and to use HealthLink SmartForms.

Shexie Platinum now has HealthLink SmartForms

Practice management solution Shexie Platinum now has HealthLink SmartForms as part of the system. This will enable Shexie users to easily refer and engage with all HealthLink SmartForms including Transport for NSW and My Aged Care.

HealthLink Technical Support

helpdesk@healthlink.net

1800 125 036

Step 1:
Setting up HealthLink SmartForms

Step 2:
Locations to launch HealthLink SmartForms

Step 3:
Launch a SmartForm

Step 4:
Select the required SmartForm

Step 5:
Ensure patient and referrer information is correct

Step 6:
Preview and Submit SmartForms

Step 7:
View or Print SmartForms

Step 1:

Setting up HealthLink SmartForms in Shexie Platinum

- Shexie users need to contact **Shexie Support to configure SmartForms.**

- Email Address: support@shexie.com.au

- Phone Number: 1300 743 943

Step 2:
Locations to launch the HealthLink SmartForms in Shexie Platinum

A1 Access from Appointments

A2 Patient Functions

A3 Patient Clinical

How to access these different locations to open HealthLink SmartForms

A1 Right Click on the Appointment for the
Patient > **HealthLink Form Patient Function**

A2 Open **Patient** and Click on **HealthLink SmartForm** option

A3 Open **Patient** > **Patient Clinical** > Click on **HealthLink SmartForm ICON**

Step 3:
Launch the HealthLink SmartForm

B Click on **New** button to create a new SmartForm for the patient

Step 4:
Select the required HealthLink SmartForm from the display

**C1** Select the required SmartForm link from the list available on the HealthLink homepage.

- The SmartForms selection will vary based on your location. Please contact Healthlink Helpdesk to get the required form if you are missing any forms based on your Practice location.
  Refer to this website for all the available HealthLink SmartForms:
  https://au.healthlink.net/products/smart-forms/smartforms-available/

C2

- Some of the SmartForms have different services to select based on your requirement. Click **Continue** to move onto the next step.

Note: The services for each SmartForm will vary based on the different referral facilities or endpoints.

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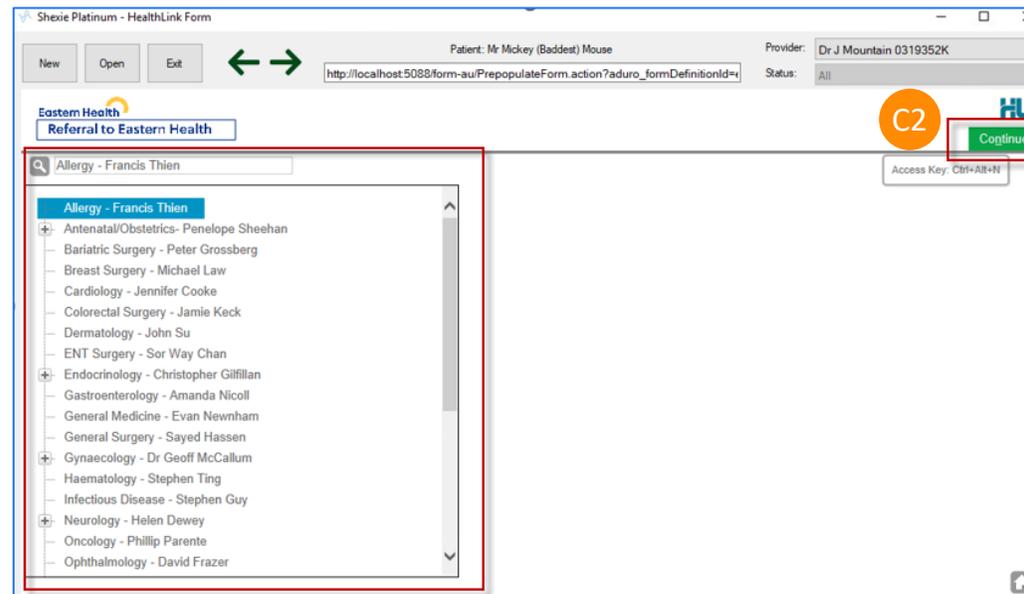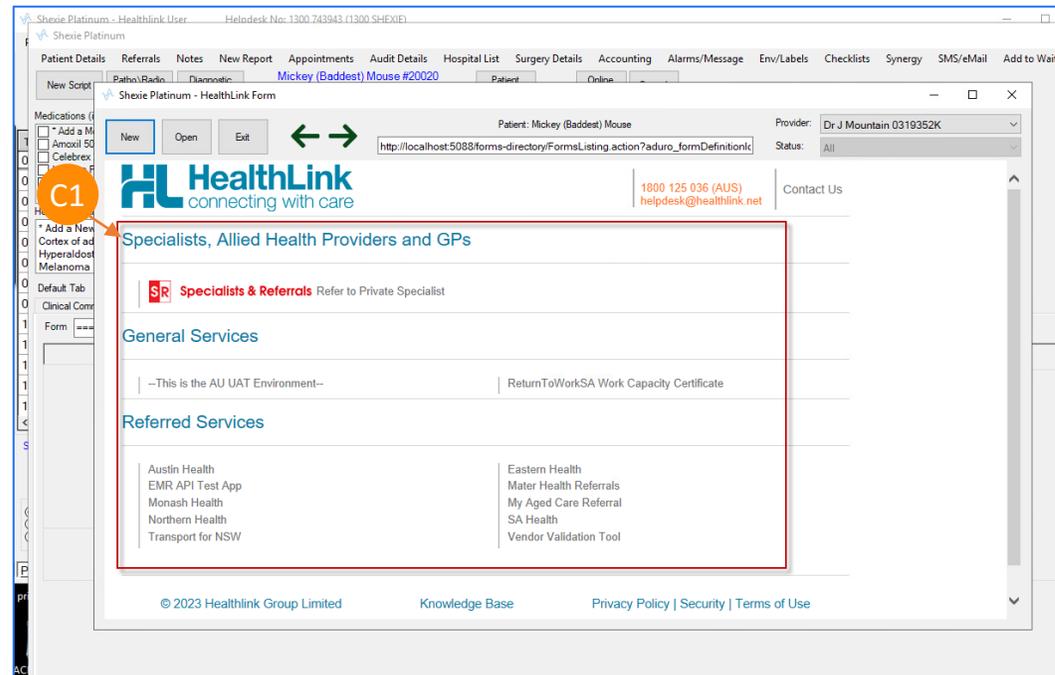
D At this point, you will have access to all the information necessary to complete the form for submission. Depending on the selections you've made, additional fields will appear allowing you to include the relevant information necessary.

E If you need to do something else or are awaiting on details not yet available, you can Park the form to save what you've currently done so far and come back to it later to complete it.

Note: (*) indicate a mandatory form field. You will not be able to submit the form until the mandatory fields are filled.

F The **Browse for Patient Document** button in the Attachment/Report tab will give you access to all the documents available on your Shexie Software to attach with the SmartForm, you can also use **Browse from Local** File button to attach it from the local machine.

Note: Please note that attachments from **local file** will need to be re-attached before submitting parked forms.

Step 5:

Ensure patient and referrer information is correct

G1 Ensure patient and referrer information is correct; With the 'Patient Information' and 'Recipient/Referrer' tabs, you simply need to ensure that the information displayed is up-to-date and correct.

G2 If a piece of required information is missing you will see the validation symbol displayed on the tab. To complete it, just click on the tab and fill-in the required field.

Step 6:

Preview and Submit the SmartForm

H To preview the referral; click Preview button (Top right corner) to verify that the form has been filled in correctly. The form will highlight which tab and which fields are incomplete if you have missed some mandatory information for the referral.

I When you are ready, click on the Submit button to send your electronic referral. This will safely and securely send the form directly to <Hospital or Specialist> and you will see a copy of the completed form containing an form sent date and time. You will also need to print a copy for the patient by clicking the Print button.

Step 7:

View or Print Submitted SmartForm and Referrals

- Viewing or Printing Submitted Referrals; A copy of the submitted form can be found in Healthlink Audit Report section.

J1 To access this location, from the Home screen, go to **Housekeeping** (on the top right side)

J2 Then click **HealthLink Audit Report** for all the Submitted/Saved and Parked forms.

Note: You will not be able to submit a form which is already been submitted once.

- **HealthLink Audit Report** will open a different window in Shexie Software. Select the date from the **dropdown** menu to display all the HealthLink Forms from that date.

- You can also select the required Provider and Status based on the top right side of the screen.

K Select the SmartForm/referral from the list and it will display in a different window. Note that after submitting the SmartForm successfully, it will open the submitted form to see or print a copy for your reference or to hand it to the patient.

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Shexie Medical Systems Support Contact Details

Shexie Pty Ltd
PO Box 538
Hornsby NSW 1630

PHONE: 1300 743 943 (1300 SHEXIE)
FAX: 1300 792 943

E-mail: info@shexie.com.au

Shexie Help Desk Hours: 8:00am to 6:00pm AEST Monday to Friday except National Public Holidays.

Customer Care
1800 125 036
helpdesk@healthlink.net

Monday to Friday (Except Public Holidays)
8:00am – 6:00pm

www.healthlink.com.au

Created by: Dhaval Pranami

Vendor Integration Coordinator

Dhaval.Pranami@healthlink.net

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