NSW Government / NSW Health

User Guide
06.11.2023-A-SP

HealthLink SmartForms for
Shexie Platinum

shexie

Welcome to HealthLink SmartForms. The smartest way for health professionals to refer their patients to NSW Health.

For more information on your Local Health District (LHD), go to:
https://health.nsw.gov.au/ereferral

Your practice must be running Shexie Platinum 7.0 or above to access the HealthLink SmartForms.

Submitting eReferrals from Shexie Platinum

Using HealthLink SmartForms

SmartForms enable **Shexie Platinum** users to easily refer and engage with all HealthLink SmartForm service providers including NSW LHDs, Transport for NSW and My Aged Care.

SmartForms are designed to speed up the service you can provide for your patients. They give you confidence that your form has been securely delivered to the service provider, and a copy has been saved to your Practice Software. And what's more, they are free for you to use.

HealthLink Technical Support

Email: helpdesk@healthlink.net
Phone: 1800 125 036

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Step 1:
Accessing HealthLink SmartForms (eReferrals)

There are three ways to access the forms within your Shexie software…

(A) <u>From Appointments</u>
In the appointment calendar, right click on the patient and then select **HealthLink Form**
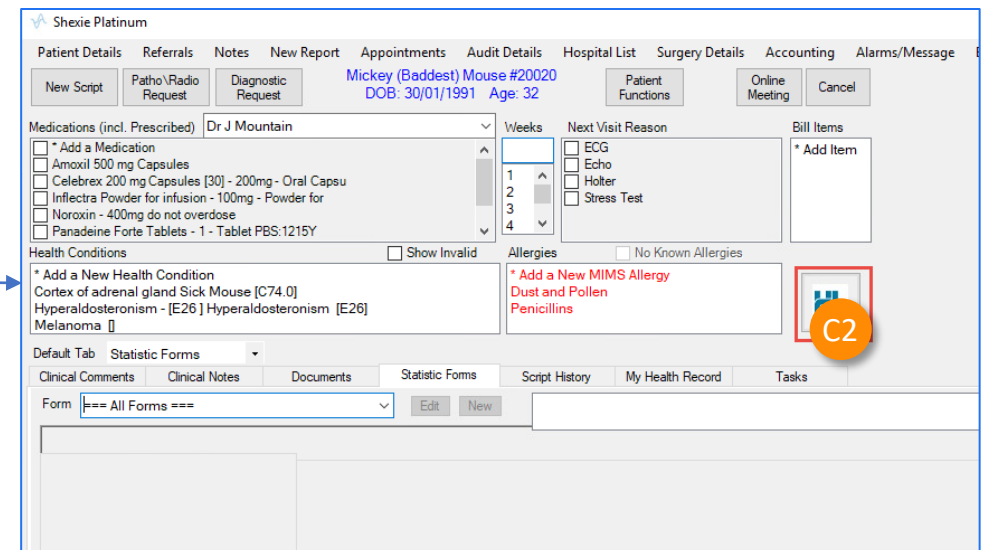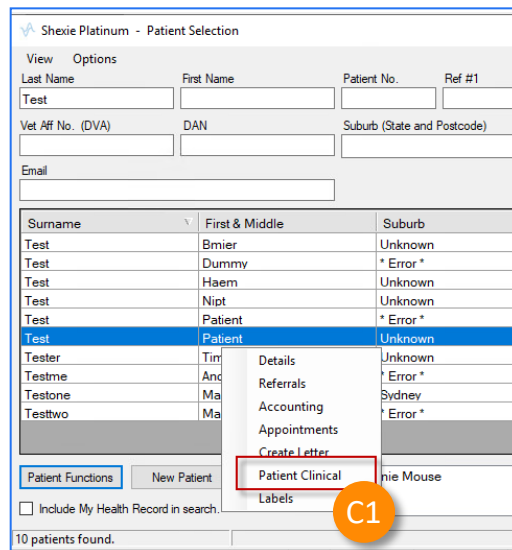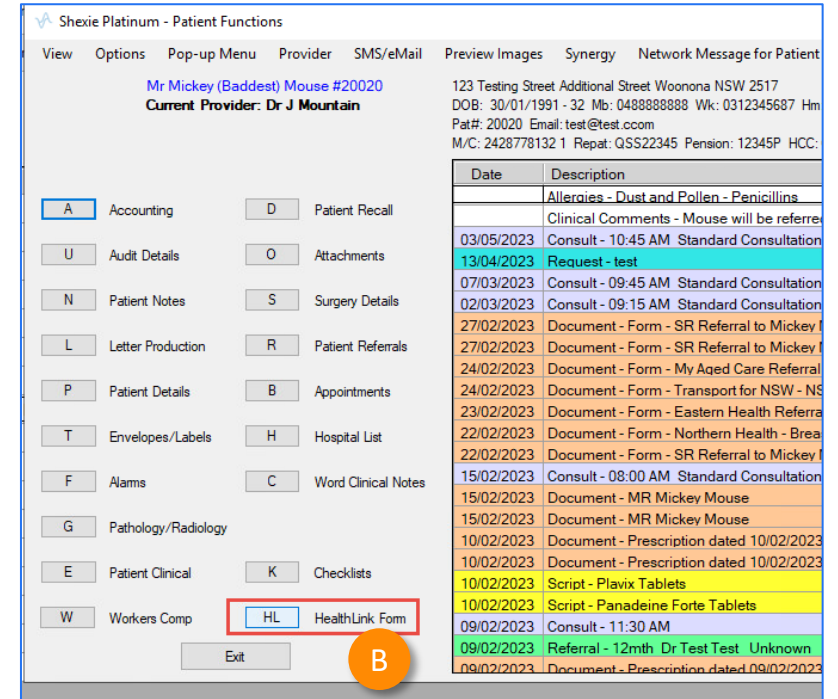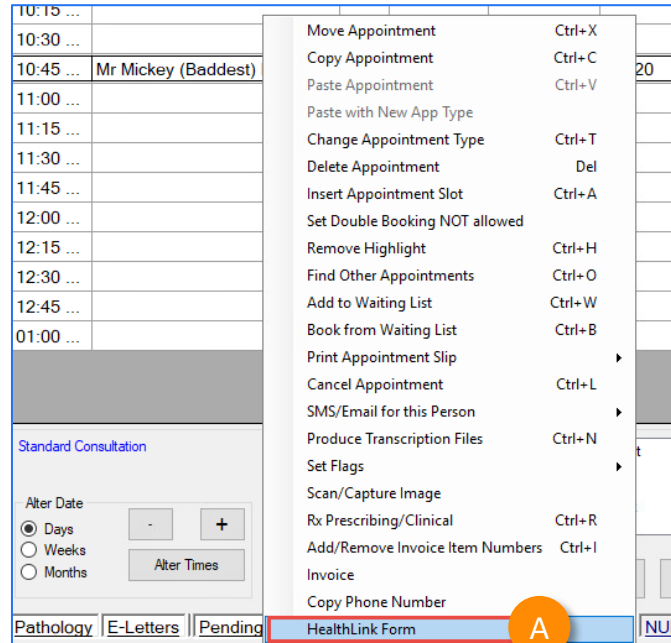
or

(B) <u>From Patient Functions</u>
Open and search for a patient via Patient Search. Once you are in the patient record click on **HL – HealthLink Form.**

or

(C) <u>From Patient Clinical</u>
From the Patient search screen, after you have located the patient, click on the patient's name, select **Patient Clinical** and then click on the **HL icon.**

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Step 1:
Accessing HealthLink SmartForms (eReferrals)

If the patient has not had a HealthLink smartform created previously, when you click on the **HL** icon, you will be taken directly to the HealthLink home page (skip to next page).

D If the patient has any previously created smartforms, you will be presented with a pop-up window where you can **access a previously parked/saved form,**

E or **create a new form** for that patient.

Step 2:
Launching a new form

Now you're on the HealthLink home page…

A Here you'll find a list of available services to refer patients.

B Within the **Referred Services** section, Click on the link named **Health Outpatient Referrals -** followed by the name of the **LHD** you wish to send to.

(**e.g**. *Health Outpatient Referrals – Western Sydney LHD*)

To launch the smart form, **NSW Health Outpatient Referrals** require you to then:

C • **select a specific service** and

D • **facility** (only if there's multiple facilities for that service)

E Then click **Continue** to launch the form.

For more information on your Local Health District (LHD), go to: https://health.nsw.gov.au/ereferral

Step 3:

Completing the form

Now you've loaded the form to complete and submit.

A **The SmartForm layout** provides a consistent, easy-to-use tabular structure on the left, with the main action window on the right.

You'll notice SmartForms are **responsive**: They will pre-populate all available patient and referrer data and contain logic to request more specific patient information based on your selections.

B **Mandatory Fields** must be completed prior to submitting the SmartForm and are each highlighted with a red asterisk.

Note: Please use HealthPathways where available to identify LHD specific referral information.

Step 3:

Completing the form

C It will also display a **warning** for some information taken from your Practice Management Software that needs reviewing.

For example, if a contact phone number does not include an area code.

D If you need more context on the questions, you can click on the **information icons**.

Step 3:
Completing the form

Reason for referral

E In some forms there may be drop down to select the reason for referral conditions.

Tip: You can start typing the condition name in the search box to narrow the list down.

Also, there will always be an option 'Other condition' if the condition you are looking for is not noted in the selection list.

HealthPathways

Please refer to HealthPathways linked here to assist you with completing this referral.

Reason for referral*   **E**   Please select ▲

[ ]

| Please select |
| Cirrhosis (suspected or known) |
| Concern for colorectal cancer (rectal bleeding or positive faecal occult blood test) |
| Hepatocellular cancer (suspected or known) or liver lesion |
| Inflammatory bowel disease or irritable bowel syndrome (suspected or known) |
| Iron deficiency |
| Liver dysfunction |
| Upper gastrointestinal dysfunction |
| Other gastroenterological condition |

Considerations / risks / barriers to access

Does the patient have primary carer / guardian?*

Interpreter required?*

Special needs/reasonable adjustments required for disability?

Are there any considerations, risks or barriers to accessing the service?

I acknowledge that the patient, or appropriate guardian, has consented to the referral and to their personal and health information being shared between the referring clinician, the nominated GP, the health service staff and other health service providers as required to facilitate their treatment or care. Patient consents to being contacted via SMS, phone, email or letter for this referral (subject to local practices).

[ ] **Patient consent***

Step 3:

Completing the form

Attachments

F The **Attachments / Reports** tab will give you access to all the supporting documents that you may wish to attach to the form.

G You can select any item from the **table** – showing you patient medical records captured from the **last six months**.

Or you can **browse for files**…

H • stored in your Practice Management Software by clicking the **Browse for Patient Document** button .

I **Note:** Make sure to update the date parameters if you want to see files that are older than 6 months.

J • *Or* in your local computer's file system by clicking the **Browse for Local File** button.

Step 3:
Completing the form

Then **click through the remaining Tabs** on the left to **ensure all the pre-populated patient information has been either selected, or de-selected, as appropriate to submit to the service provider.**

All these features ensure you're providing a quality, and compliant submission every time, on behalf of your patients.

Previewing, Submitting and Parking

Previewing

A You can verify that the form has been completed correctly by clicking **Preview** allowing you to review the details before submitting.

B Whether you click **Preview** or **Submit**, if a piece of required information is incomplete or incorrect, the form will notify you to complete or correct it.

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Step 4:

Previewing, Submitting and Parking

Submitting

C When you are ready to send your form, click **Submit**.

D This will safely and securely send the form electronically via HealthLink, and you will see a copy of the completed form with a **date stamp.**

A copy of the submitted form is saved directly to the patient file.

E If you'd like to provide the patient with a copy, you can left-click the **Print** button or right-click anywhere on the submitted form and choose Print.

NSW Health [Service]

Submit | Preview | Park | Help

Medical Practitioner Information

Requested Information
General Surgery

Medicare Provider Number* 889843
Medical Registration Number

HPI-I 8003611566681627
HPI-O 123456

Attachments / Reports

Name
Full name   Sam Entwistle

Medications, Allergies, Alerts

▸ Sam Entwistle

Medical, Social and Family History

Practice name
Millstone Family Practice

Practice Address

Patient Information

▸ 155 George Street, Galleria, Sydney, NSW, 2000

Print

Form sent on 22/10/2023 09:34 AEST

Sensitive: Personal

[Service]   NSW Health

Patient: MICKEY HEATLEY, 81yrs, M, DOB 17/12/1941, PH: 0401 201 2011, Wrk 03 9 23423221

Residential address: 95 Pitt Street, Apartment, Sydney, NSW 2000

Postal address: 9600 Pitt Street, Apartment, Sydney, NSW 2000

Referred by: Sam Entwistle, Millstone Family Practice, Prov. No. 889843, HPI-O 123456, HPI-I 8003611566681627, PH 03 9 358 0116, FAX 03 9 4433456

Clinical Referral Information

Referred To: Specialist - unnamed referral
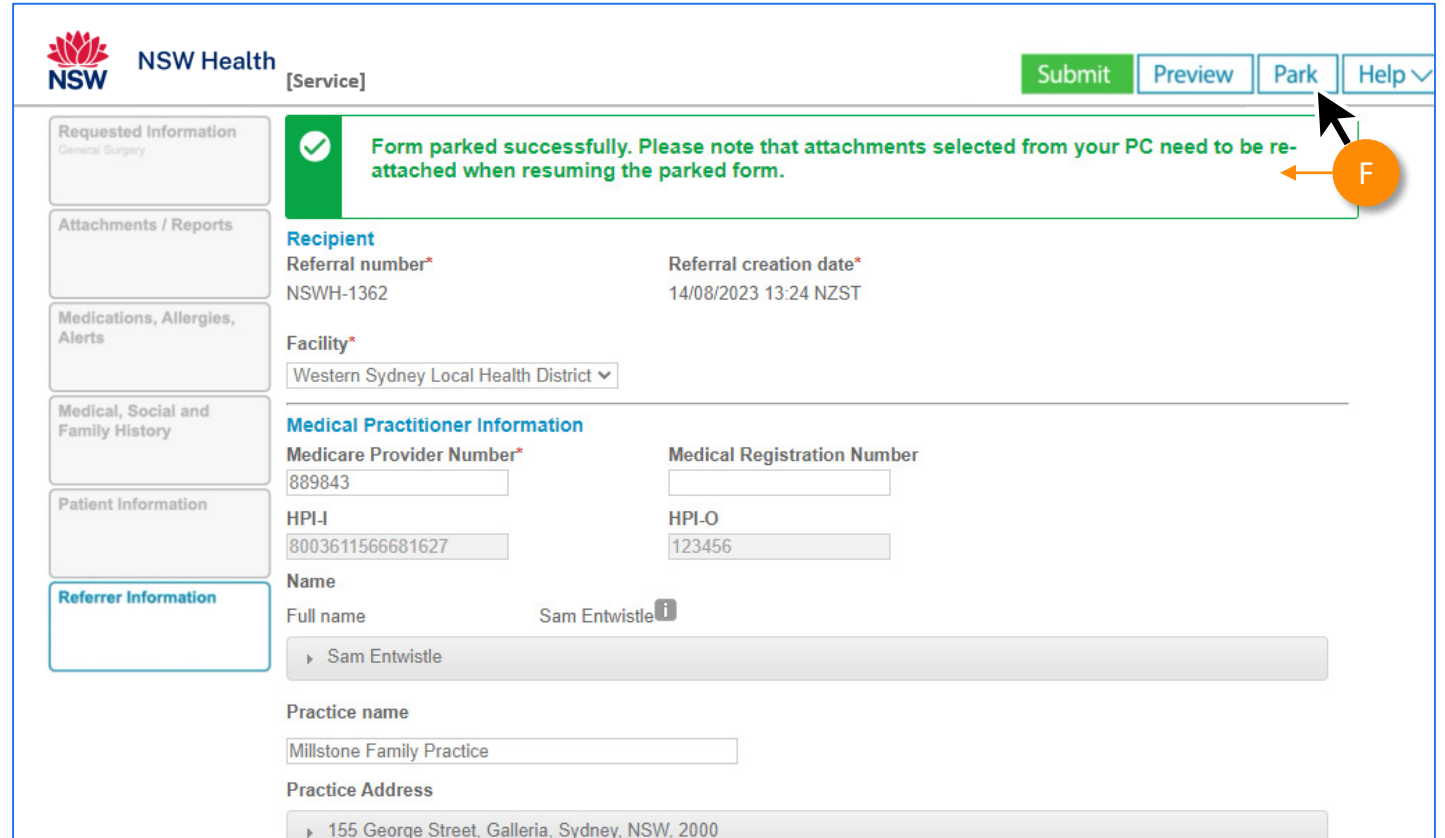
Patients presenting at NSW public hospitals can choose to be treated as a public (hospital funded) or private (Medicare bulk-billed) patient. Public hospitals do not control referral pathways to deny access to free public hospital services. Patients will be provided with further information and will be asked to make an election when they present to the outpatient clinic for their appointment. Patients will require a named referral to a medical specialist if they choose to be a private patient

Referral Date: 14/08/2023

Referral Type: New

Step 4:

Previewing, Submitting and Parking

Parking

F And if you need more information to complete the form, you can **Park** the form to save what you've done so far and come back to it later.
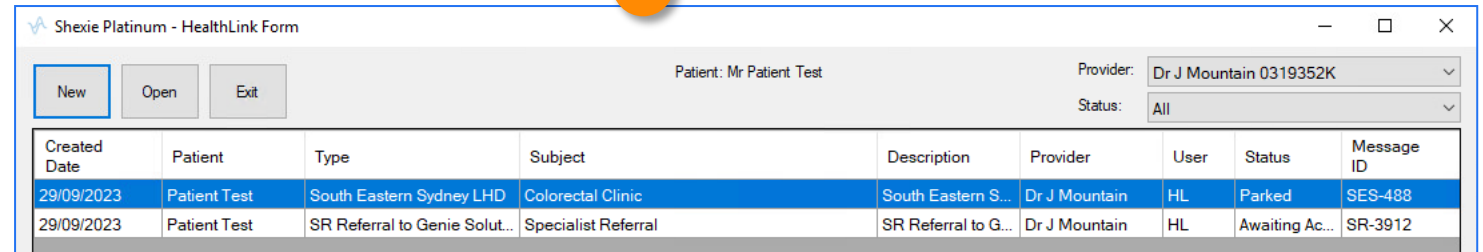
Step 5:

Accessing parked and auto-saved forms

A Any form parked or submitted can be seen from the patient's file after clicking the HL icon.

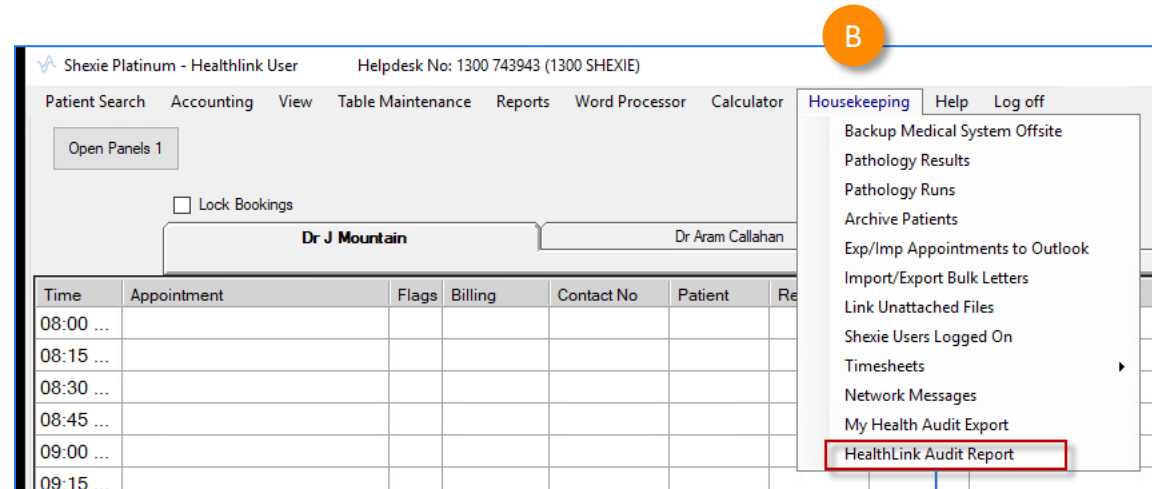**B** Also, you can access all forms via **Housekeeping** > **HealthLink Audit Report**

Note: when returning to a parked or auto-saved form, due to security policy, any previously added attachments will need to be re-added.

Step 6:

Accessing submitted forms

A Submitted forms are saved back to the Documents tab where it can be viewed

Step 7:
What happens after a referral has been made?

- NSW Health Outpatients will respond with a **Status Message** regarding the **Referral Acceptance** or **Referral Rejection** with reasons.

- These Status Messages will be received back into your Practice Software using the same workflows when receiving Incoming Reports and Results, and Other correspondence like Discharge Summaries.

Viewing incoming reports

A From the home screen – if incoming correspondence is waiting to be viewed – tabs at the bottom will flash red.

You are also able to click on E-Letters and it will take you to the incoming correspondence area.

Step 7:

What happens after a referral has been made?

Viewing incoming reports (continued)

You can also access incoming correspondence by…

B   Selecting **View** from the menu

C   Then clicking **Review Incoming Electronic Files**

What happens after a referral has been made?

Viewing incoming reports (continued)

D The right-hand side shows the messages waiting for review.

E The right-hand panel enables you to link/match/filter etc.

Step 8:

What if the LHD wants additional information?

If you receive a correspondence from the LHD to send additional information, please send a new referral through with the additional information:

A Launch a **new HealthLink form** from the patient's file.

B In the new form**,** for **Referral type*,** Select **'Updated'**

Then complete the form with the additional information that was requested by the LHD.

HealthLink —— Part of Clanwilliam

HealthLink is part of Clanwilliam, a vast network of healthcare enterprises spanning across the United Kingdom, Ireland, New Zealand, Australia, and India. Together, we're working collectively to create safer, more efficient and better healthcare for everyone.