### **Health**Link



### <u>User Guide</u>

09.07.2024 ZM

# HealthLink SmartForms for Zedmed

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: <a href="https://health.nsw.gov.au/ereferral">https://health.nsw.gov.au/ereferral</a>

Your practice must be running Zedmed v35 or above to access the HealthLink SmartForms.



# Submitting eReferrals from Zedmed

### Using HealthLink SmartForms

SmartForms enable **Zedmed** 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)

To access the forms within your Zedmed software...

First, search for the patient and open their electronic medical record.
(Hotkey: F4)

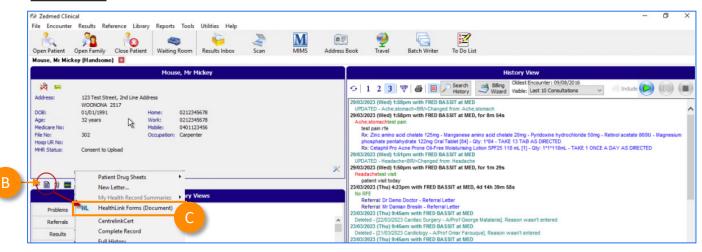
Once the patient's file is open, there are several ways to launch the HealthLink forms page.

- One way is to click the Quick Documents icon
- and select **HealthLink Forms (Document)** from the pop-up menu.

Alternatives methods on the following page...



#### Method 1:



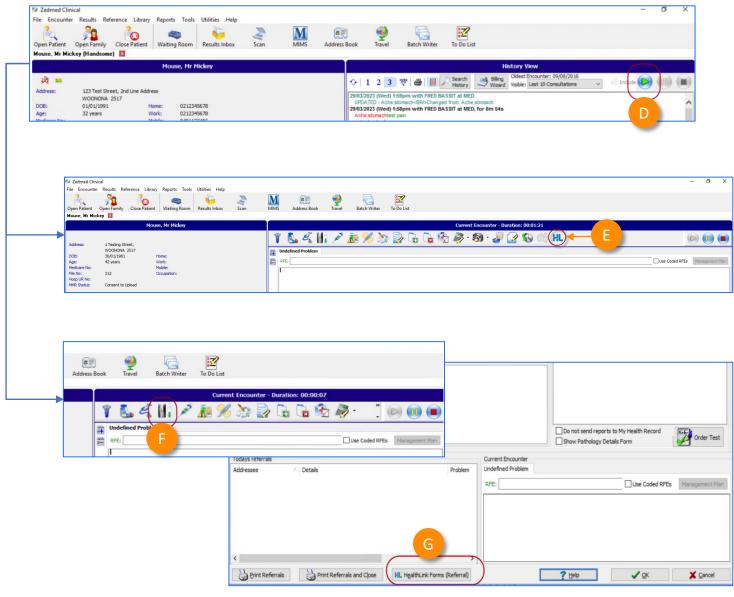
#### Step 1:

### Accessing HealthLink SmartForms (eReferrals)

Alternatively, when you've opened the patient's medical record...

- Choose Start Encounter
  - Then click the HealthLink (HL) icon
    - Or -----
  - → F Choose **Referral Icon** and
  - Then click on the **Healthlink Forms** (**Referral**) Referral Module

#### **Start Encounter**



#### 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.
- 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.

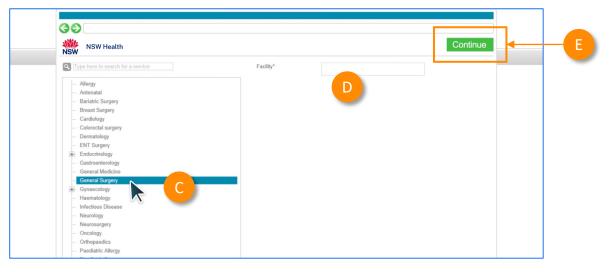
(e.g. Health Outpatient Referrals – Western Sydney LHD)

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

- select a specific service and
- 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

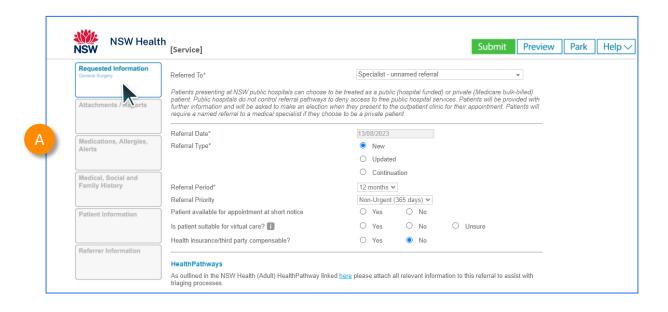
Now you've loaded the form to complete and submit.

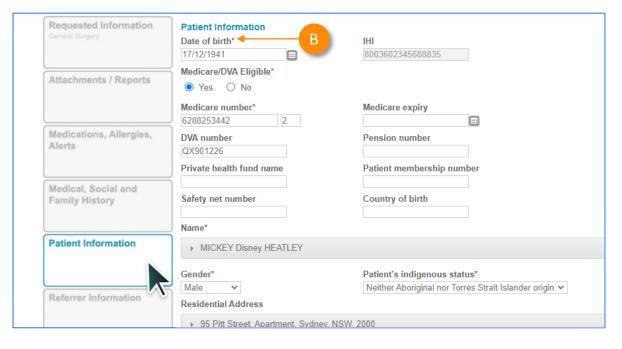
The SmartForm layout provides a consistent, easy-to-use tabular structure on the left, with the main action window on the right.

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.

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.





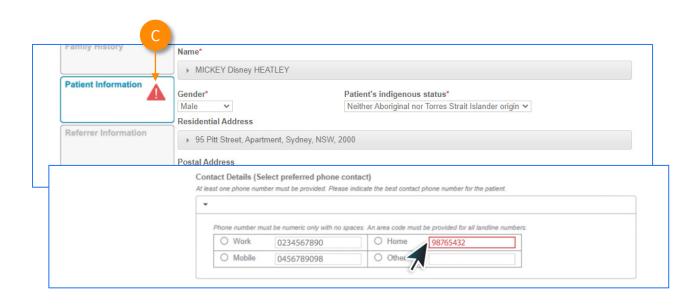
## Step 3: Completing the form

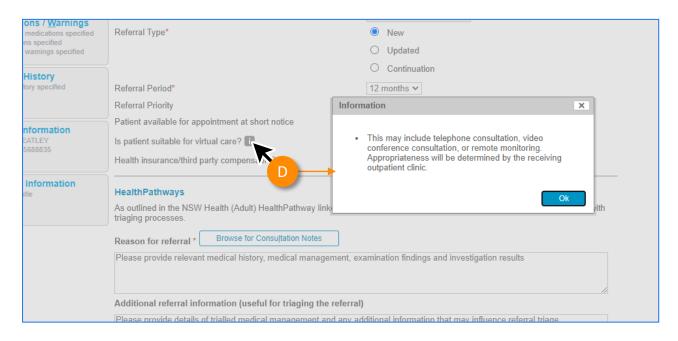
It will also display a **warning** for some information taken from your Practice Management Software that needs reviewing.

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

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







#### Step 3:

### **Completing the form**

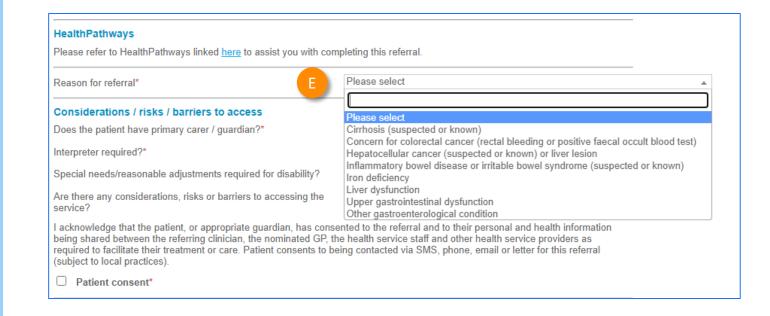
#### Reason for referral



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.



#### Step 3:

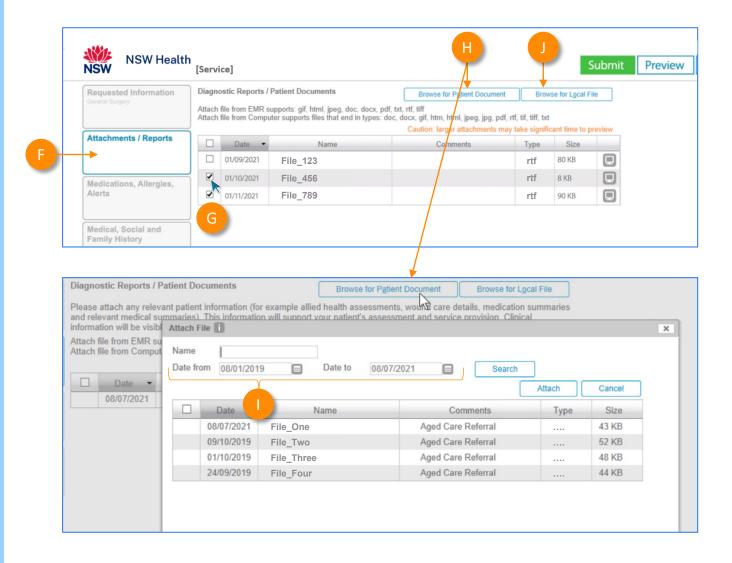
### **Completing the form**

#### **Attachments**

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

- stored in your Practice Management
  Software by clicking the Browse for Patient
  Document button.
  - Note: Make sure to update the date parameters if you want to see files that are older than 6 months.
- Or in your local computer's file system by clicking the Browse for Local File button.

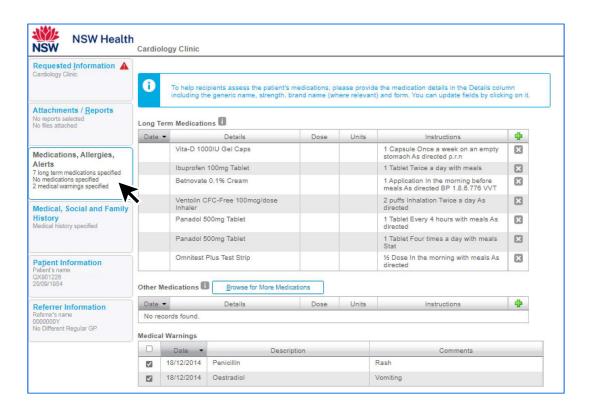


### Step 3:

### **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.

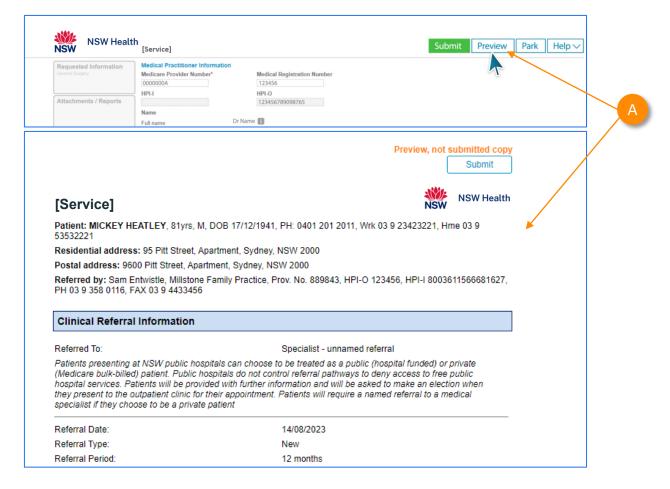




# Step 4: Previewing, Submitting and Parking

#### **Previewing**

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





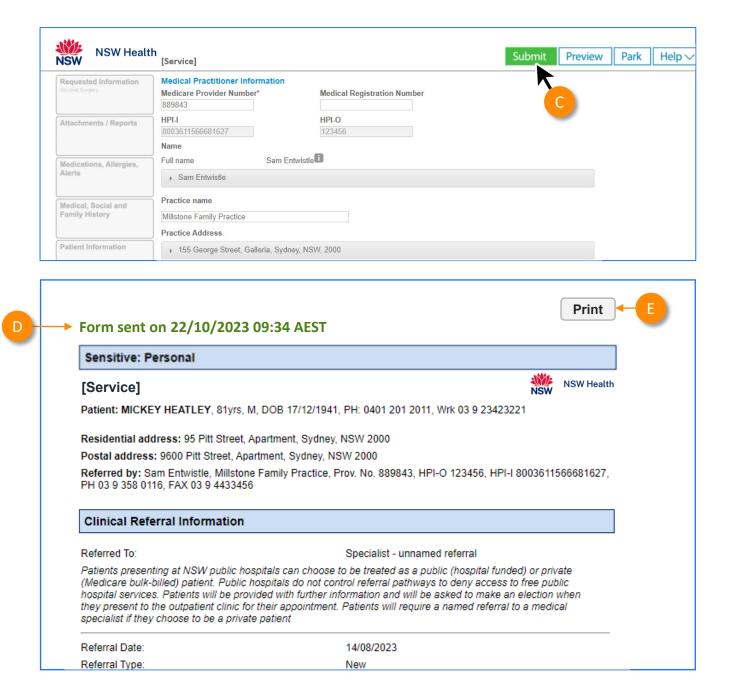
# Step 4: Previewing, Submitting and Parking

#### **Submitting**

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

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.

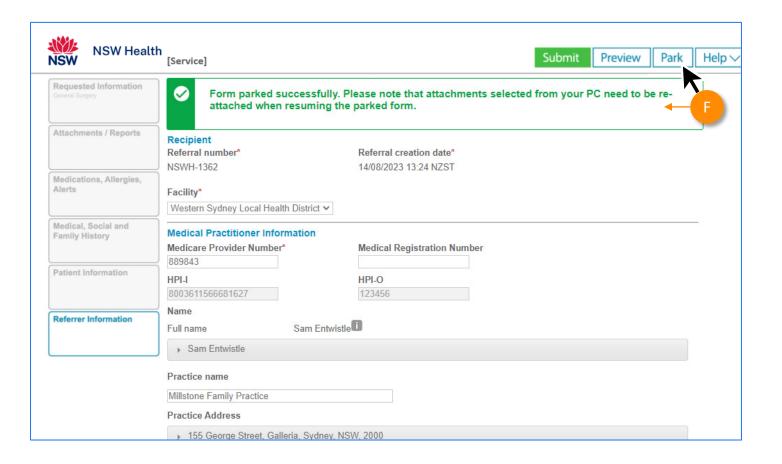


# Step 4: Previewing, Submitting and Parking

#### **Parking**



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:

## Managing SmartForms and eReferrals in Zedmed

Any HealthLink SmartForm referral created for a patient can be viewed and interacted with in Zedmed's **Summary Views** section of the patient's record.

Locating a patient's referral/document...

- B If a referral is done through an Encounter, then it will go into the **Referrals** tab.
- If a referral is done through Quick Documents, it will show in the **Documents** tab.

**Note:** You can locate 'parked' and 'auto-saved' forms here too.

**Note**: Users need to right click on the item they want to edit / update.

**Note:** when returning to a draft form, due to security policy, any previously added attachments will need to be re-added.



Zedmed status options manually selected by doctor:

- Open referral not been actioned or discussed with the patient.
- Closed referral has been discussed with the patient or no action is required.

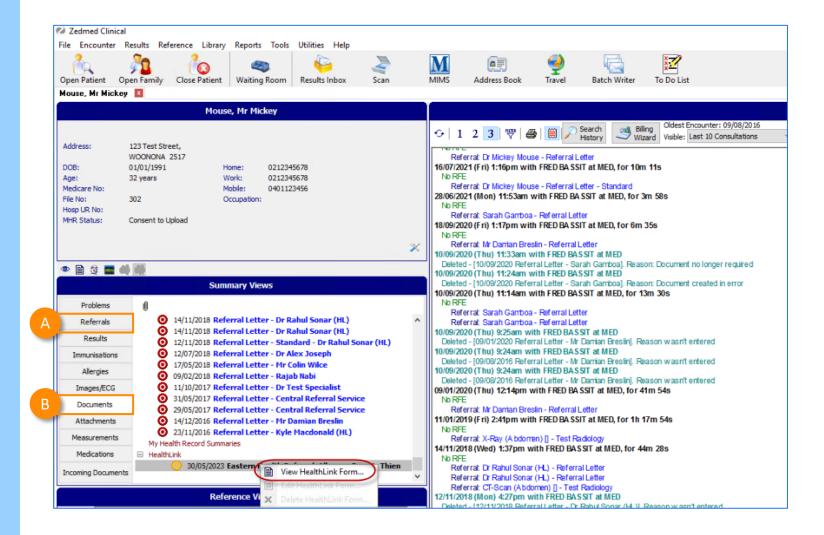
HealthLink status options:

- O Draft the referral/document has not been submitted.
- Processed the referral/document has been submitted.
- Awaiting Acknowledgement the referral has been submitted, waiting for an Acknowledgement from the Referred To service.

#### Step 6:

## Accessing submitted forms

- A copy of the submitted form can be found in the **Summary View > Referrals section**
- B Or the Summary View > Documents section



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#### Step 7:

## What happens after a referral has been made?

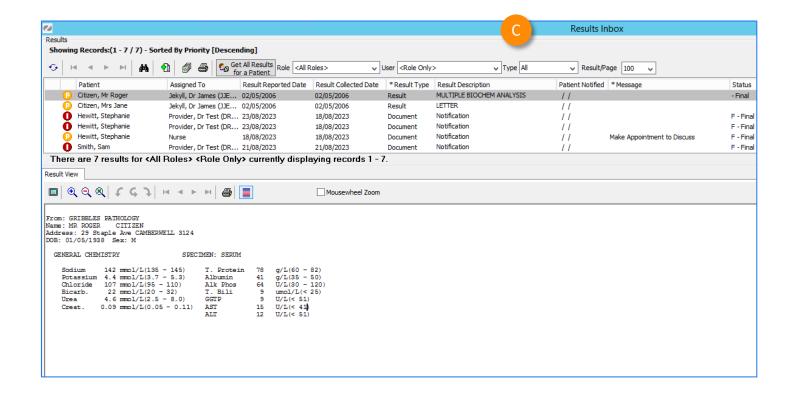
- NSW Health Outpatients will respond with a Status Message regarding the Referral Acceptance or Referral Rejection with reasons.
- These Status Messages will be received back into your Practice Software using the same workflows when receiving Incoming Reports and Results, and Other correspondence like Discharge Summaries.

#### **Viewing incoming reports**

- A Click on 'Results Inbox' or go Results > Results Inbox.
- Use the selection tool bar to filter results such as choosing 'Role' and 'User'.
- This will bring up a list of results for the selected filters.





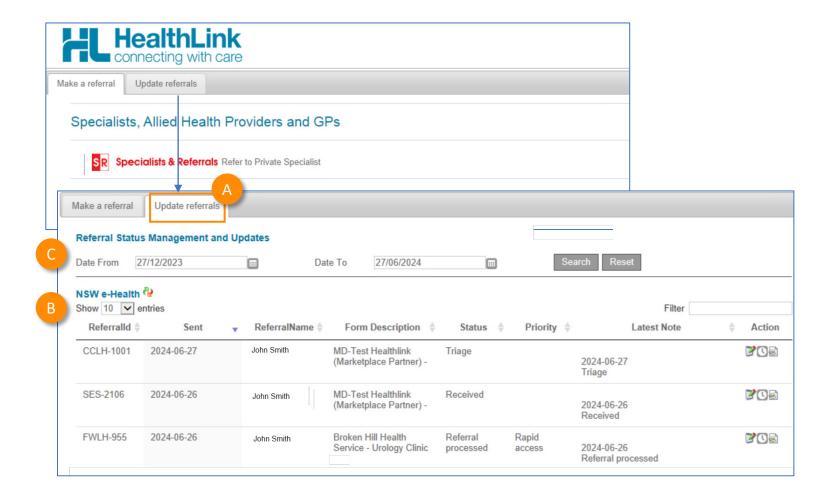


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# Update Referral: Adding additional information for the LHD

The **Update Referral** feature allows you to review your patient's referrals and submit additional information, if the patient's condition or circumstance changes, or in response to a request from the LHD/clinic that you referred your patient to.

- Follow Step 1: Accessing HealthLink SmartForms (eReferrals) then navigate to the 'Update Referrals' tab (second tab on the screen).
- Here you'll see referrals made for the patient by you in the last 6 months, split into separate tables for each referred organisation.
- You can search for referrals by selecting a different date range. **Note**: Please specify a date range that is at least a day apart.



# Update Referral: Adding additional information for the LHD

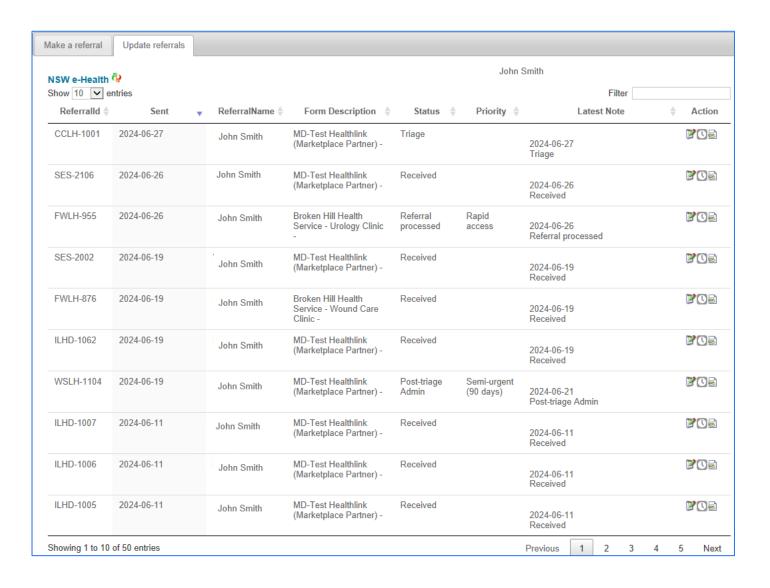


At a glance you can see the following key information for each referral:

- Status
- Priority assigned by NSW Health Outpatients, and
- Latest Note: any notes added by the NSW Health Outpatients.

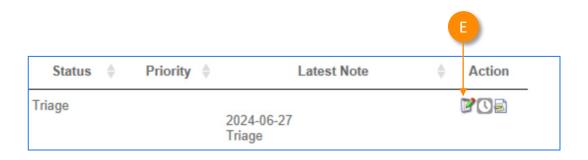
### Can't see your patient's referral on the list? The following types of referrals will not appear on the list:

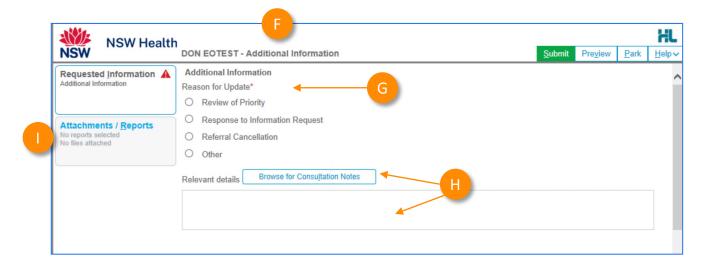
- Referrals made by other providers in your practice
- Referrals made by other practices, irrespective of the PMS used
- Referrals sent via other channels (e.g. fax)
- Your patient's identification details do not match with the patient's record in the hospital system



# Update Referral: Adding additional information for the LHD

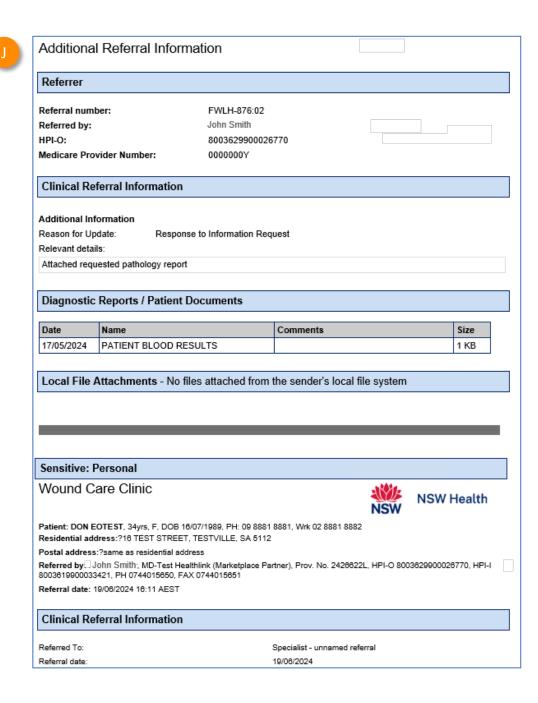
- To update a referral, click on the icon on the referral.
- The 'Additional Information' form will be displayed for you to provide your updates
  - G Select the relevant Reason for Update from the list
  - Enter the relevant information into the 'Relevant details' field or use the 'Browse Consultation Notes' function to add consultation notes.
- Attach the relevant documents you would like included in the update using the 'Attachments / Reports' tab





# Update Referral: Adding additional information for the LHD

- When you send the update, the additional information you provide on the form will be appended to the original referral at the top and sent together to the LHD.
  - If there are multiple updates sent for a referral, they will be displayed in order of the most recent first.
  - Just as with other forms, you can Park an Additional Information form. Parked and Autosaved referral updates can be found in your patient's record (See Step 5 Accessing parked and auto-saved forms)



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#### Step 9:

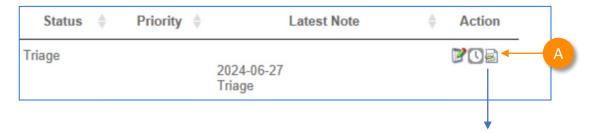
# Viewing more information on submitted referrals

#### View a submitted referral



To view a submitted referral from the Update Referral page, click on the icon on the referral.

 If a referral had updates provided to it, the original referral and updates will be displayed.



Sensitive: Personal	
Wound Care Clinic	NSW Health
Patient: DON EOTEST, 34yrs, F, DOB 16/07/1989, PH: 09 888 Residential address: 216 TEST STREET, TESTVILLE, SA 511	r
Postal address:?same as residential address	
Referred by: John Smith, MD-Test Healthlink (Marketplace Par 8003619900033421, PH 0744015650, FAX 0744015651	tner), Prov. No. 2426622L, HPI-O 8003629900026770, HPI-I
Referral date: 19/06/2024 16:11 AEST	
Clinical Referral Information	
Referred To:	Specialist - unnamed referral
Referral date:	19/06/2024
Referral type:	New
Referral period:	Indefinite
Referral priority:	Rapid access
Patient available for appointment at short notice?	No
Third party compensable?	No
Reason for referral :	
test	
Considerations / risks / barriers to access	
Does the patient have primary carer / guardian?	No
Interpreter required?	No
Special needs/reasonable adjustments required for disability?	No
Are there any considerations, risks or barriers to accessing the service?	No
I acknowledge that the patient, or appropriate guardian, has cor information being shared between the referring clinician, the non providers as required to facilitate their treatment or care. Patient	

this referral (subject to local practices).

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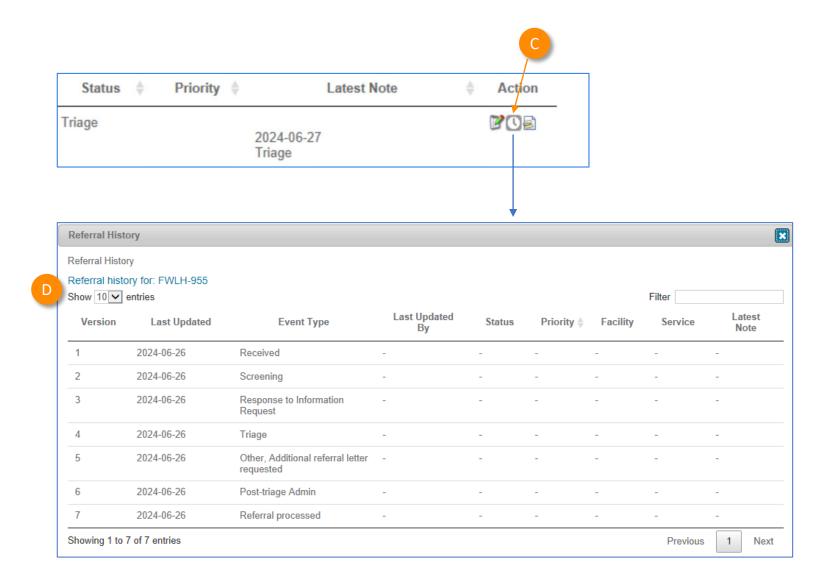
#### Step 9:

# Viewing more information on submitted referrals

#### **View a referral history**

- To view the history of a referral, click on the oicon for the referral.
- The Referral History page shows you a summary of the referral's history as provided by NSW Health Outpatients. Activities in the history are shown with the most recent activities first.

**Note:** The version number shown indicates the number of updates made within the LHD rather than version numbers of the referral.



#### **Customer Care**

Phone: 1800 125 036

Email: helpdesk@healthlink.net

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

www.healthlink.com.au



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