

User Guide

06.11.2023-A-GE

HealthLink SmartForms for Genie

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 Genie v8.8 or above to access the HealthLink SmartForms.



Submitting eReferrals from Genie

Using HealthLink SmartForms

SmartForms enable **Genie** 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

Step 1:

**Accessing HealthLink SmartForms
(eReferrals)**

Step 2:

Launching a new form

Step 3:

Completing the form

Step 4:

Previewing, Submitting and Parking

Step 5:

Accessing parked and auto-saved forms

Step 6:

Accessing submitted forms

Step 7:

**What happens after a referral has
been made?**

Step 8:

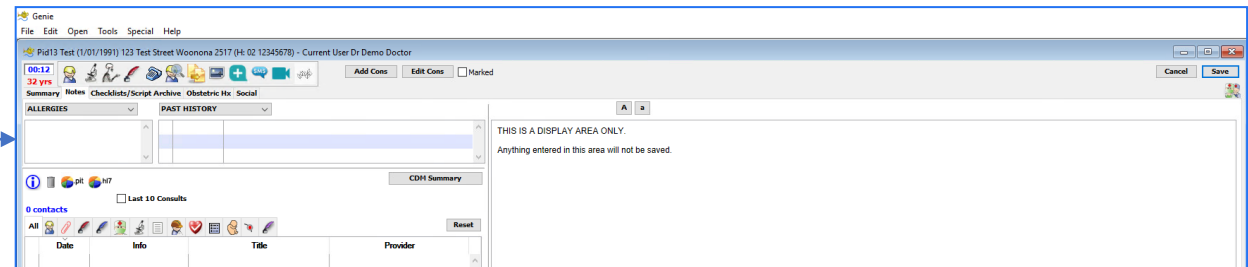
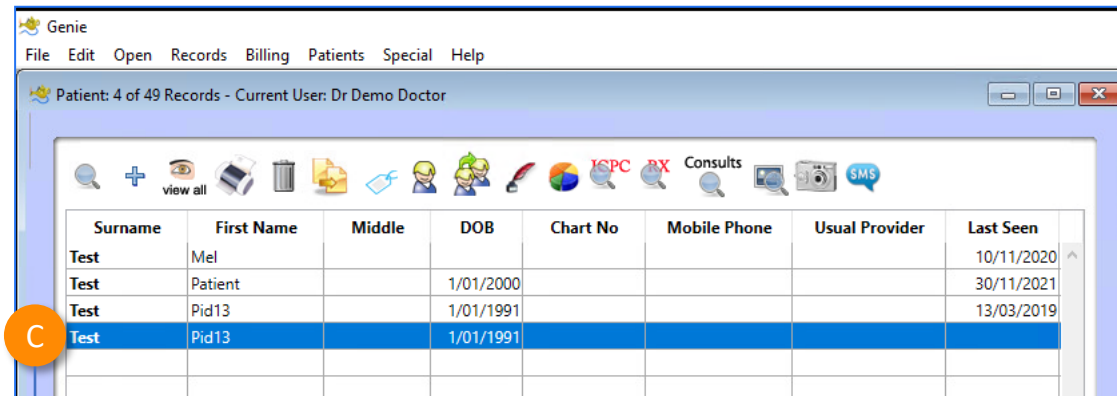
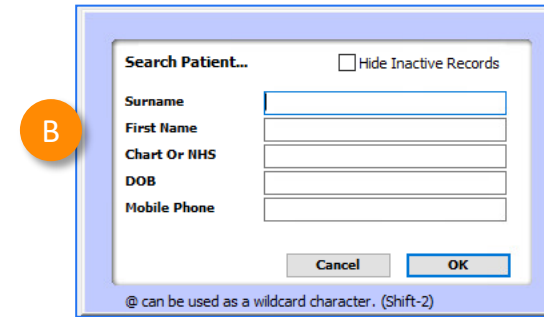
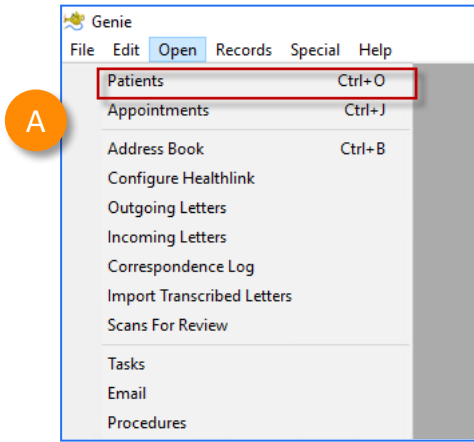
**What if the LHD wants additional
information?**

Step 1: Accessing HealthLink SmartForms (eReferrals)

To access the forms within your Genie software...

First, search for the patient and open their electronic medical record:

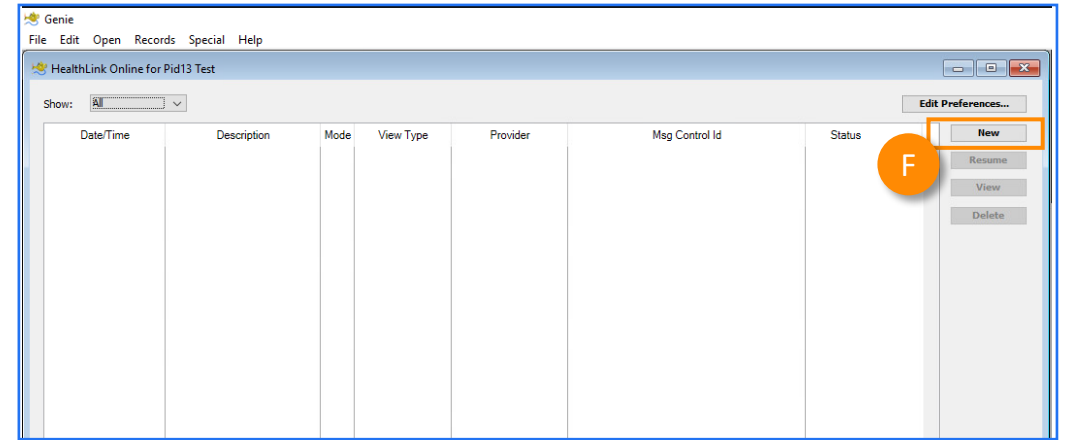
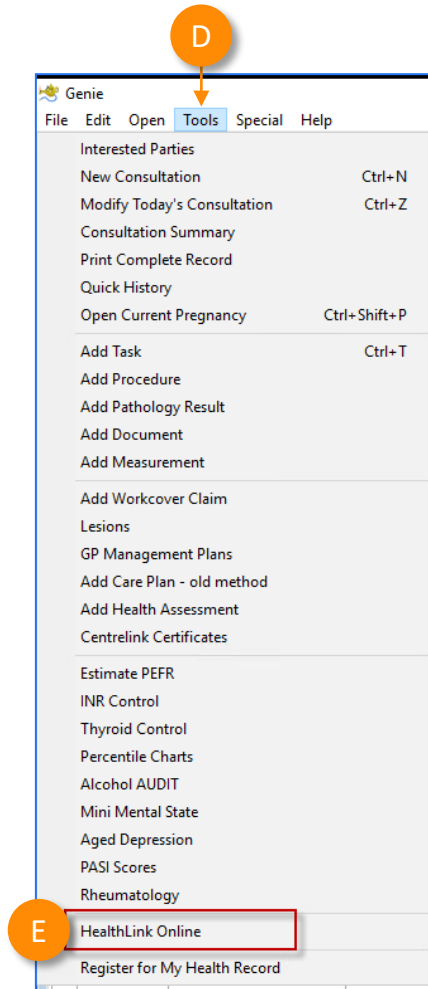
- A** Open > Patients from the main menu.
- B** Search for the patient you require.
- C** Select the patient and their record will come up.



Step 1: Accessing HealthLink SmartForms (eReferrals)

From the patient's record...

- D** Select **Tools**
- E** Then **HealthLink Online**
- F** Now click the **New** button to launch the HealthLink home page to create a new referral.



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>

HealthLink
connecting with care

Make a referral | Update a referral

Search a Private Specialist or Allied Health Provider to Refer Patient

Type individual / practice name, or specialty then enter | Search | Help | Clear | State: Tasmania

Referred Services

- Aged Care Referral
- Cardiometabolic Health in Psychosis
- Certificate of Capacity
- Community Health
- Fitness to Drive Assessment
- General Health
- Health Specialist Consulting Clinics
- Hearing Medical Certificate
- Hospital Services
- Medical Certificate for Insurance Claim
- NSW Health Outpatient Referrals – [LHD Name]**
- Online Medical Certificate
- Outpatient and Community Referral Form
- Radiology Referrals
- Regional Health Service

NSW Health

Type here to search for a service | Facility*

- Allergy
- Antenatal
- Bariatric Surgery
- Breast Surgery
- Cardiology
- Colorectal surgery
- Dermatology
- ENT Surgery
- Endocrinology
- Gastroenterology
- General Medicine
- General Surgery**
- Gynaecology
- Haematology
- Infectious Disease
- Neurology
- Neurosurgery
- Oncology
- Orthopaedics
- Paediatric Allergy

Continue

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.

NSW Health [Service] Submit Preview Park Help

Requested Information (General Surgery) 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

Attachments / Reports

Medications, Allergies, Alerts

Medical, Social and Family History

Patient Information

Referrer Information

Referral Date* 13/08/2023

Referral Type* New Updated Continuation

Referral Period* 12 months

Referral Priority Non-Urgent (365 days)

Patient available for appointment at short notice Yes No

Is patient suitable for virtual care? Yes No Unsure

Health insurance/third party compensable? Yes No

HealthPathways
As outlined in the NSW Health (Adult) HealthPathway linked [here](#) please attach all relevant information to this referral to assist with triaging processes.

Requested Information (General Surgery)

Attachments / Reports

Medications, Allergies, Alerts

Medical, Social and Family History

Patient Information

Referrer Information

Patient Information

Date of birth* 17/12/1941

IHI 8003602345688835

Medicare/DVA Eligible* Yes No

Medicare number* 6288253442 2

Medicare expiry

DVA number QX901226

Pension number

Private health fund name

Patient membership number

Safety net number

Country of birth

Name* MICKEY Disney HEATLEY

Gender* Male

Patient's indigenous status* Neither Aboriginal nor Torres Strait Islander origin

Residential Address 95 Pitt Street, Apartment, Svdnev, NSW, 2000

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**.



The screenshot shows a patient form with several sections: Family History, Patient Information, Referrer Information, Residential Address, Postal Address, and Contact Details. A red triangle warning icon is present in the Patient Information section, with an orange circle 'C' and an arrow pointing to it. The Patient Information section includes fields for Name (MICKEY Disney HEATLEY), Gender (Male), Patient's indigenous status (Neither Aboriginal nor Torres Strait Islander origin), and Residential Address (95 Pitt Street, Apartment, Sydney, NSW, 2000). The Contact Details section has a dropdown menu and radio buttons for Work, Home, Mobile, and Other, each with a corresponding phone number field. The Home phone number field contains '98765432' and is highlighted with a red border.

The screenshot shows a referral form with several sections: Referral Type, Referral Period, Referral Priority, Patient available for appointment at short notice, Is patient suitable for virtual care?, Health insurance/third party compensation, HealthPathways, Reason for referral, and Additional referral information. An information icon (i) is present in the 'Is patient suitable for virtual care?' field, with an orange circle 'D' and an arrow pointing to it. An information dialog box is open, displaying the following text: 'This may include telephone consultation, video conference consultation, or remote monitoring. Appropriateness will be determined by the receiving outpatient clinic.' The dialog box has an 'Ok' button.

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**

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*

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

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.

NSW Health [Service]

Requested Information: General Surgery

Attachments / Reports

Medications, Allergies, Alerts

Medical, Social and Family History

Diagnostic Reports / Patient Documents

Browse for Patient Document (H) | Browse for Local File (J)

Attach file from EMR supports: gif, html, jpeg, doc, docx, pdf, txt, rtf, tiff
 Attach file from Computer supports files that end in types: doc, docx, gif, htm, html, jpeg, jpg, pdf, rtf, tif, tiff, txt
 Caution: larger attachments may take significant time to preview

<input type="checkbox"/>	Date	Name	Comments	Type	Size	
<input type="checkbox"/>	01/09/2021	File_123		rtf	80 KB	
<input checked="" type="checkbox"/>	01/10/2021	File_456		rtf	8 KB	
<input checked="" type="checkbox"/>	01/11/2021	File_789		rtf	90 KB	

Diagnostic Reports / Patient Documents

Browse for Patient Document | Browse for Local File

Please attach any relevant patient information (for example allied health assessments, wound care details, medication summaries and relevant medical summaries). This information will support your patient's assessment and service provision. Clinical information will be visible to all staff.

Attach File

Name:

Date from: 08/01/2019 | Date to: 08/07/2021 | Search


Attach | Cancel

<input type="checkbox"/>	Date	Name	Comments	Type	Size
	08/07/2021	File_One	Aged Care Referral	...	43 KB
	09/10/2019	File_Two	Aged Care Referral	...	52 KB
	01/10/2019	File_Three	Aged Care Referral	...	48 KB
	24/09/2019	File_Four	Aged Care Referral	...	44 KB

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.



NSW Health

Cardiology Clinic

Requested Information ▲

Cardiology Clinic

Attachments / Reports

No reports selected
No files attached

Medications, Allergies, Alerts

7 long term medications specified
No medications specified
2 medical warnings specified

Medical, Social and Family History

Medical history specified

Patient Information

Patient's name
CX901228
20/08/1954

Referrer Information

Referrer's name
0000000Y
No Different Regular GP

Long Term Medications ⓘ

Date	Details	Dose	Units	Instructions	
	Vita-D 1000IU Gel Caps			1 Capsule Once a week on an empty stomach As directed p.r.n	✕
	Ibuprofen 100mg Tablet			1 Tablet Twice a day with meals	✕
	Betnovate 0.1% Cream			1 Application In the morning before meals As directed BP 1.8.6.776 VVT	✕
	Ventolin CFC-Free 100mcg/dose Inhaler			2 puffs Inhalation Twice a day As directed	✕
	Panadol 500mg Tablet			1 Tablet Every 4 hours with meals As directed	✕
	Panadol 500mg Tablet			1 Tablet Four times a day with meals Stat	✕
	Omnitest Plus Test Strip			½ Dose In the morning with meals As directed	✕

Other Medications ⓘ [Browse for More Medications](#)

Date	Details	Dose	Units	Instructions	
No records found.					

Medical Warnings

<input type="checkbox"/>	Date	Description	Comments
<input checked="" type="checkbox"/>	18/12/2014	Penicillin	Rash
<input checked="" type="checkbox"/>	18/12/2014	Oestradiol	Vomiting

Attachments / Reports

No reports selected
No files attached

Medicare Provider Number*

889843

Medical Registration Number

Medications, Allergies, Alerts

7 long term medications specified
No medications specified
2 medical warnings specified

HPI-I

8003611566681627

HPI-O

123456

Medical, Social and Family History

Medical history specified

Name

Full name **Sam Entwistle** ⓘ

▶ Sam Entwistle

Practice name

Millstone Family Practice

Patient Information

Patient's name
CX901228
20/08/1954

Practice Address

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

Practice telephone*

03 9 358 0116

Referrer Information

Referrer's name
0000000Y
No Different Regular GP

Email

zongjun@gmail.com

Practice fax

03 9 4433456

EDI*

ma65test

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.

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.

NSW Health [Service]

Requested Information: General Surgery

Medical Practitioner Information:

- Medicare Provider Number*: 0000000A
- Medical Registration Number: 123456
- HPI-I: [Field]
- HPI-O: 123456789098765
- Name: [Field]
- Dr Name: [Field]

Buttons: Submit, Preview, Park, Help

Preview, not submitted copy

Submit

NSW Health

[Service]

Patient: MICKEY HEATLEY, 81yrs, M, DOB 17/12/1941, PH: 0401 201 2011, Wrk 03 9 23423221, Hme 03 9 53532221

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

Referral Period: 12 months

NSW Health Gastroenterology & Liver Clinics

Requested Information: Gastroenterology & Liver Clinics

Attachments / Reports: No reports selected, No files attached

Medications, Allergies, Alerts: 4 long term medications specified, No medications specified, 1 medical warning specified

Medical, Social and Family History

Referred To*: Please Select

Referral date*: 17/10/2023

Referral type*: New, Updated

Buttons: Submit, Preview

Errors:

- Patient consent is a required field
- Reason for referral is a required field
- Referred To is a required field
- Triage category is a required field

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]

Requested Information: General Surgery

Attachments / Reports

Medical Practitioner Information

Medicare Provider Number*: 889843

Medical Registration Number: []

HPI-I: 8003611566681627

HPI-O: 123456

Name: Full name Sam Entwistle

Practice name: Millstone Family Practice

Practice Address: 155 George Street, Galleria, Sydney, NSW, 2000

Buttons: Submit, Preview, Park, Help

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

Sensitive: Personal

[Service]

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

Referral Date: 14/08/2023

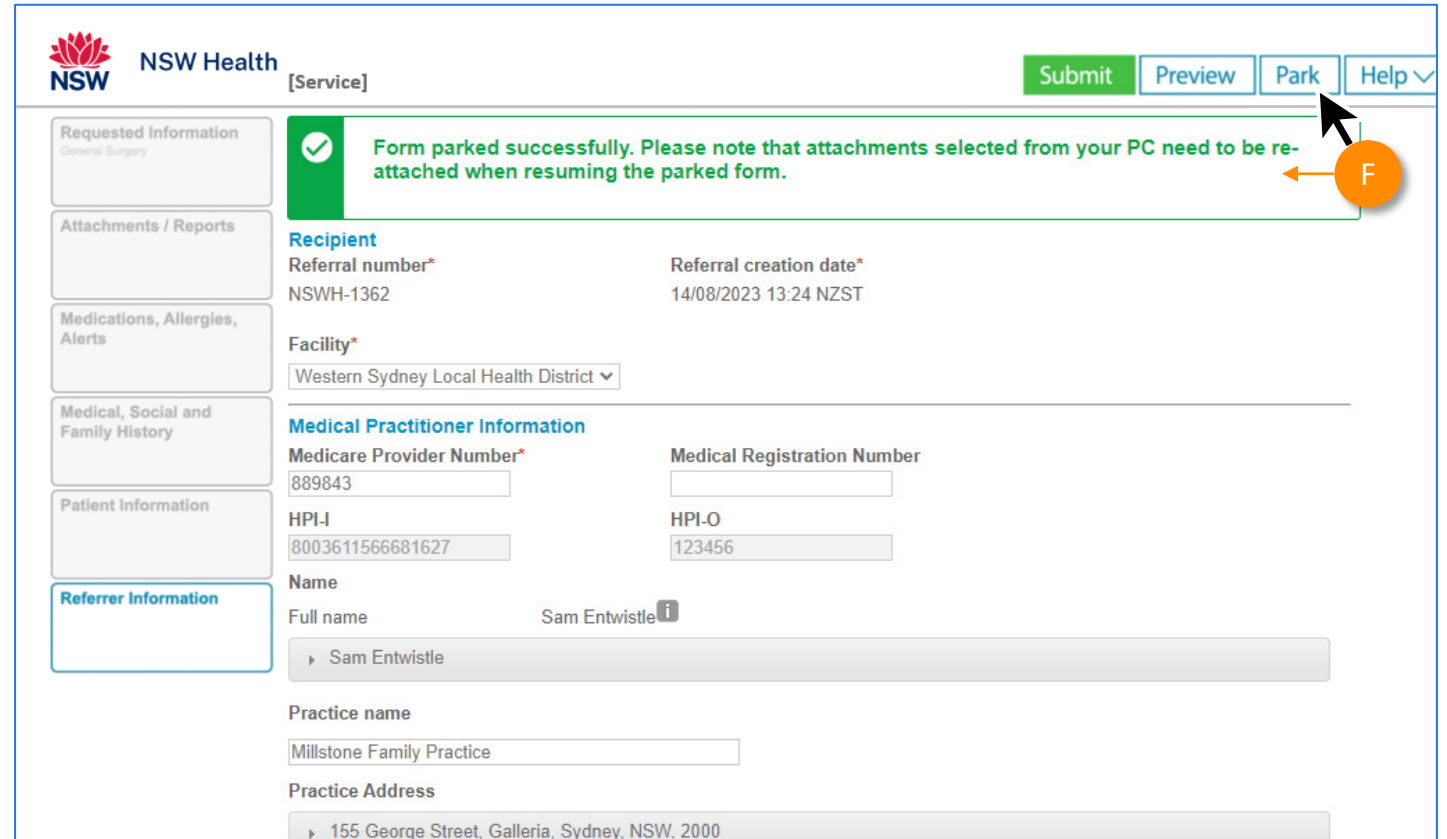
Referral Type: New

Buttons: Print

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.



The screenshot shows the NSW Health referral form interface. At the top left is the NSW Health logo and the text "[Service]". On the top right are buttons for "Submit", "Preview", "Park", and "Help". A green message box at the top right contains a checkmark icon and the text: "Form parked successfully. Please note that attachments selected from your PC need to be re-attached when resuming the parked form." An orange circle with the letter 'F' and an arrow points to the "Park" button. The form is divided into several sections on the left: "Requested Information" (General Surgery), "Attachments / Reports", "Medications, Allergies, Alerts", "Medical, Social and Family History", "Patient Information", and "Referrer Information" (highlighted in blue). The main content area displays the following information:

- Recipient**
 - Referral number*: NSWH-1362
 - Referral creation date*: 14/08/2023 13:24 NZST
 - Facility*: Western Sydney Local Health District
- Medical Practitioner Information**
 - Medicare Provider Number*: 889843
 - Medical Registration Number: [input field]
 - HPI-I: 8003611566681627
 - HPI-O: 123456
- Name**
 - Full name: Sam Entwistle **i**
 - Dropdown menu: Sam Entwistle
- Practice name**
 - Millstone Family Practice
- Practice Address**
 - Dropdown menu: 155 George Street, Galleria, Sydney, NSW, 2000

Step 5:

Accessing parked and auto-saved forms

To access parked or auto-saved forms, from the patient's record...

A Go to **Tools**

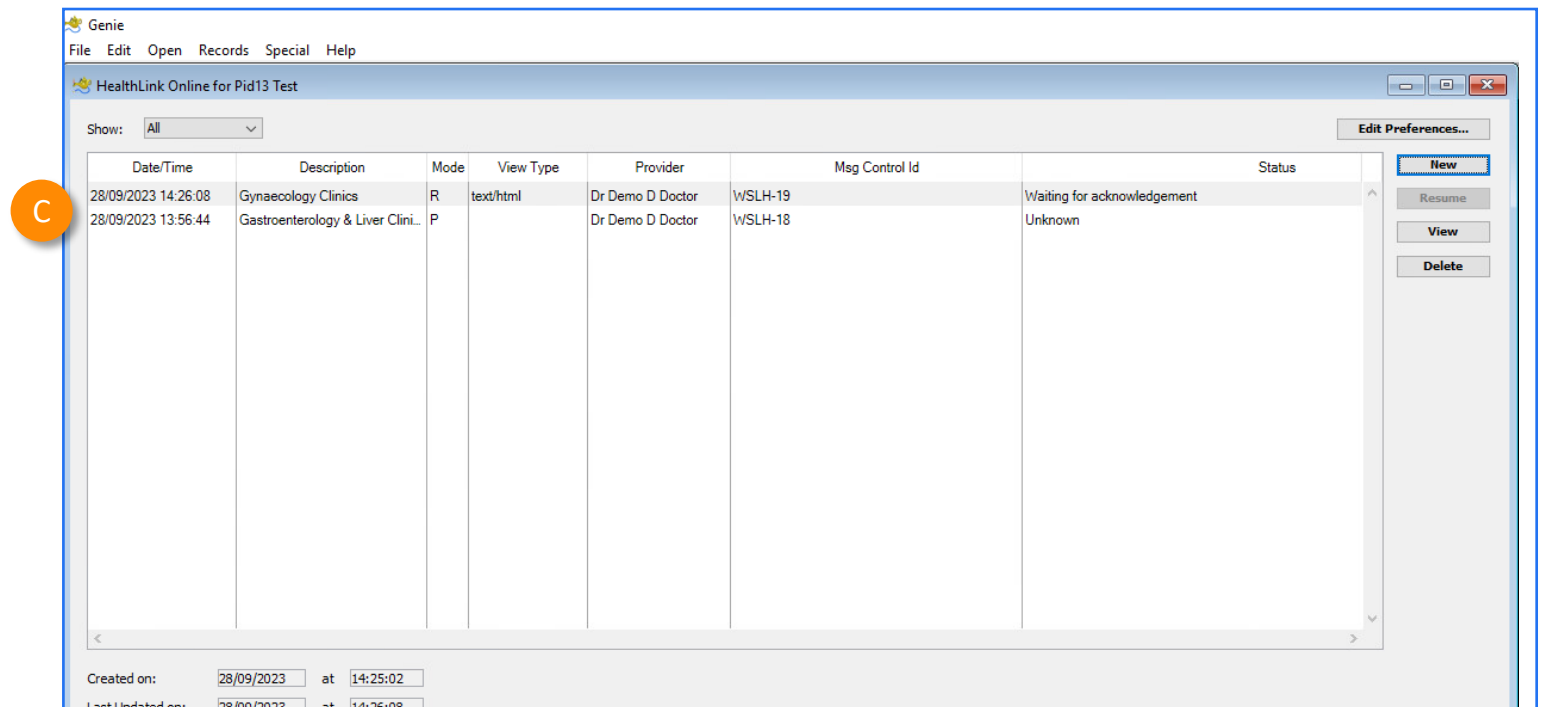
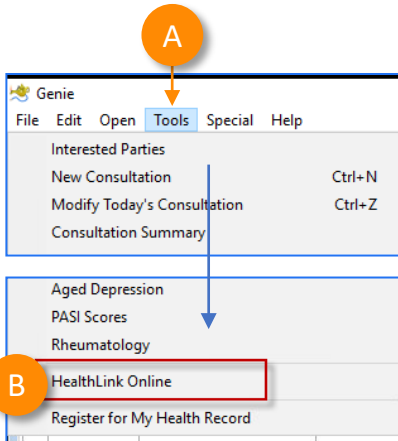
B **HealthLink Online**

C Once a form is **parked** or **saved** it will show in this screen. From here you can highlight and **resume** the form or view the form's **status**.

Submitted forms also show in this window.

Unknown indicates that the message has not been submitted.

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 A copy of the submitted referral will go into the patient's record under the purple Quill

Note: The only way to access the parked/autosaved or submitted form is from within the patient record.

B From here you can highlight the submitted report to view it.

Note: this area only shows the SmartForms that have been submitted.

The screenshot shows the Genie patient record for Pid13 Test (1/01/1991) at 123 Test Street Woonona 2517. The interface includes a menu bar (File, Edit, Open, Tools, Special, Help), a toolbar with various icons, and a main content area. A table titled '1 HealthLink Online form' is displayed, with columns for Date, Info, Title, and Provider. The first row contains the date 28/09/2023, a purple quill icon, the title 'Gastroenterology & Liver Clinics [P]', and the provider 'Dr Demo Doctor'. A red box highlights the quill icon, and a red circle with the letter 'A' points to it.

Date	Info	Title	Provider
28/09/2023		Gastroenterology & Liver Clinics [P]	Dr Demo Doctor

The screenshot shows the Genie patient record for the same patient, but now displaying the details of the submitted form. The table from the previous screenshot is visible, with the second row (dated 28/09/2023, titled 'Gynaecology Clinics [R]', provider 'Dr Demo Doctor') highlighted in blue. A red circle with the letter 'B' points to this row. The right-hand side of the screen displays the form details, including patient information, referral date, and clinical referral information.

Form sent on 28/09/2023 14:26 NZDT

Sensitive: Personal

Gynaecology Clinics

NSW Health

Patient: Pid13 Test, 32yrs, M, DOB 01/01/1991, PH: 02 12345678
 Residential address: 123 Test Street, Woonona, NSW 2517
 Postal address: same as residential address
 Referred by: Demo Doctor, Healthlink Test Clinic, Prov. No. 1234567X, HPI-I 8003614900014568, PH 987654321, FAX 98764545
 Referral date: 28/09/2023 14:26 NZDT

Clinical Referral Information

Referred To: Specialist - unnamed referral

Referral date: 28/09/2023
 Referral type: New
 Referral period: 12 months
 Referral priority: Non-urgent (365 days)
 Patient available for appointment at short notice? No
 Third party compensable? No

Reason for referral: Fibroids

Supportive referral Information

- FBC
- Iron studies (if appropriate)
- Cervical screen test (most recent)
- Abdominal ultrasound (if appropriate)

Have you included all appropriate supportive referral information? Yes

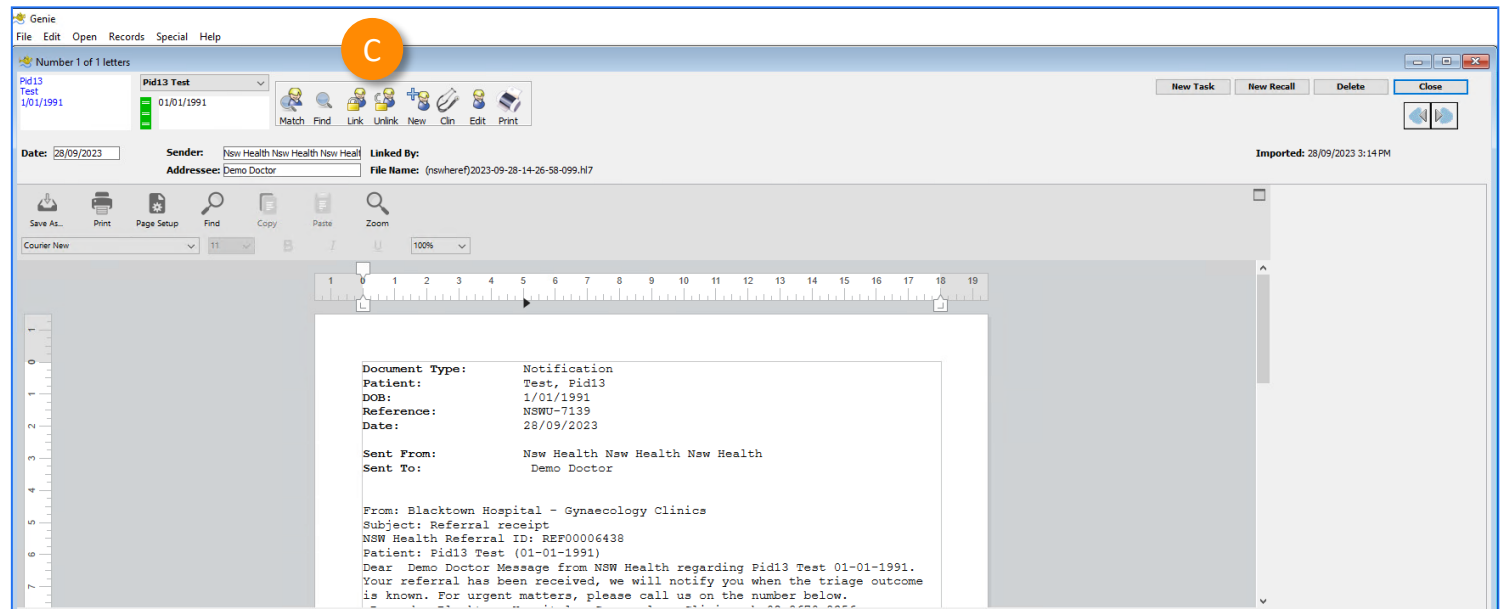
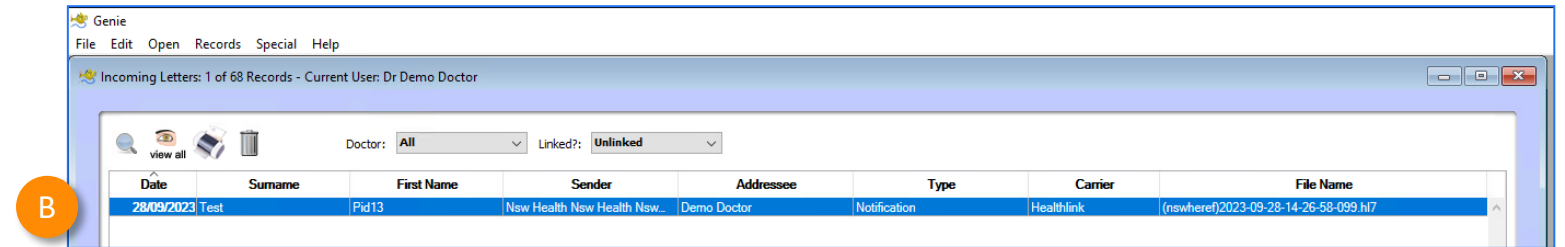
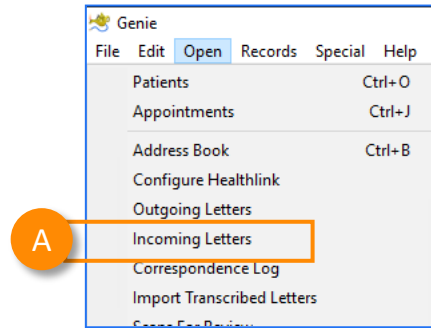
Step 7:

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

- From the menu, go **Open > Incoming Letters**
- Here you can **view incoming letters**, filter by Doctor and linked or unlinked. **Sort** by date, file name or patient name, as well as search by patient name.
- Double clicking an item in this list will open it up and allow you to **link/match it to the patient**. Once the letter has been linked/matched it will show in the patient's file.



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.

The screenshot shows the HealthLink interface with the 'Referred Services' section. A search bar at the top contains the text 'Type individual / practice name, or specialty then enter' and a dropdown menu set to 'Tasmania'. Below the search bar, a list of services is displayed. The service 'NSW Health Outpatient Referrals - [LHD Name]' is highlighted in yellow, and a red circle with the letter 'A' and an arrow points to it.

Referred Services	
Aged Care Referral	Medical Certificate for Insurance Claim
Cardiometabolic Health in Psychosis	NSW Health Outpatient Referrals - [LHD Name]
Certificate of Capacity	Online Medical Certificate
Community Health	Outpatient and Community Referral Form
Fitness to Drive Assessment	Radiology Referrals
General Health	Regional Health Service
Health Specialist Consulting Clinics	

The screenshot shows the NSW Health referral form for Gastroenterology & Liver Clinics. The form includes several sections: 'Requested Information', 'Attachments / Reports', 'Medications, Allergies, Alerts', 'Medical, Social and Family History', 'Patient Information', and 'Referrer Information'. The 'Referral type*' field is highlighted with an orange box and a red circle with the letter 'B', showing the 'Updated' radio button selected. Other fields include 'Referred To*' (Please Select), 'Referral date*' (17/10/2023), 'Referral period*' (12 months), 'Referral priority' (Non-urgent (365 days)), 'Patient available for appointment at short notice?' (No), 'Is patient suitable for virtual care?' (No), and 'Third party compensable?' (No). The 'HealthPathways' section provides a link to assist with completing the referral.

Requested Information ⚠️
Gastroenterology & Liver Clinics

Attachments / Reports
No reports selected
No files attached

Medications, Allergies, Alerts
No long term medications specified
No medications specified
2 medical warnings specified

Medical, Social and Family History
No medical history specified

Patient Information ⚠️
Test ERMS
6950539691 1
01/02/1982

Referrer Information

Referred To* Please Select

Referral date* 17/10/2023

Referral type*
 New
 Updated
 Continuation

Referral period* 12 months

Referral priority Non-urgent (365 days)

Patient available for appointment at short notice? Yes No

Is patient suitable for virtual care? Yes No Unsure

Third party compensable? Yes No

HealthPathways
Please refer to HealthPathways linked [here](#) to assist you with completing this referral.

Reason for referral* Please select

Customer Care

Phone: 1800 125 036

Email: helpdesk@healthlink.net

Monday to Friday (Except Public Holidays)

8:00am – 6:00pm

www.healthlink.com.au

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.