

## User Guide

06.11.2023-A-MD

# HealthLink SmartForms for Medical Director Clinical

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 Medical Director Clinical 3.16 or above to access the HealthLink SmartForms.



MedicalDirector

# Submitting eReferrals from Medical Director Clinical

## Using HealthLink SmartForms

SmartForms enable **Medical Director** 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.

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### HealthLink Technical Support

Email: [helpdesk@healthlink.net](mailto:helpdesk@healthlink.net)

Phone: 1800 125 036

Step 1:

**Accessing HealthLink SmartForms (eReferrals)**

Step 2:

**Launching a new form**

Step 3:

**Completing the form**

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**Accessing parked and auto-saved forms**

Step 6:

**Accessing submitted forms**

Step 7:

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

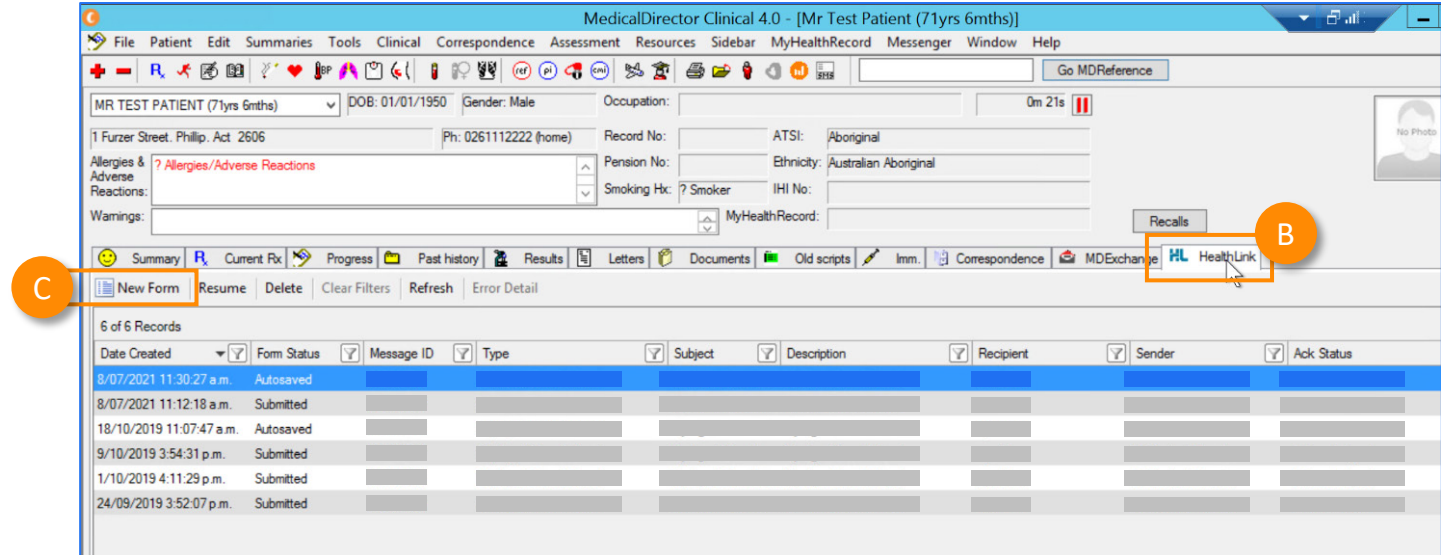
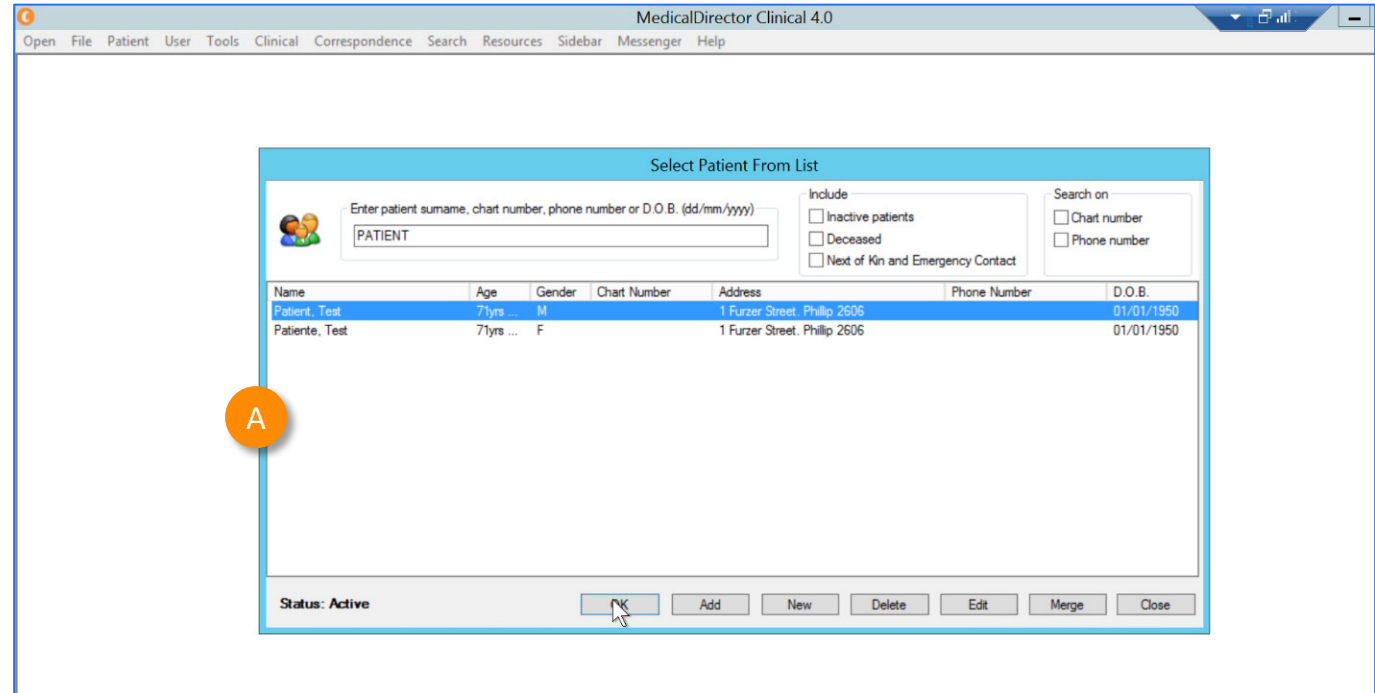
Step 8:

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

# Step 1: Accessing HealthLink SmartForms (eReferrals)

To access the forms within your  
Medical Director software...

- A** First, search for the patient and open their electronic medical record.
- B** Then click the **HealthLink** tab.
- C** Now click on the **New Form** button to launch the **HealthLink** home page.



## 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    State

#### Referred Services

Aged Care Referral	Medical Certificate for Insurance Claim
Cardiometabolic Health in Psychosis	<b>NSW Health Outpatient Referrals – [LHD Name]</b>
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	
Hearing Medical Certificate	
Hospital Services	

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

## 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, Sdney, 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 warning triangle icon with the letter 'C' is positioned over the Patient Information section. The Patient Information section includes fields for Name (MICKEY Disney HEATLEY), Gender (Male), and Patient's indigenous status (Neither Aboriginal nor Torres Strait Islander origin). 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 positioned over the 'Is patient suitable for virtual care?' question. A mouse cursor is clicking on this icon, and 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** i [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**

**HPI-I**

8003611566681627

**HPI-O**

123456

**Name**

Full name **Sam Entwistle**

▶ Sam Entwistle

**Practice name**

Millstone Family Practice

**Practice Address**

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

**Practice telephone\***

03 9 358 0116

**Practice fax**

03 9 4433456

**Email**

zongjun@gmail.com

**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]

Buttons: Submit, Preview, Park, Help

Requested Information: General Surgery

Medical Practitioner Information

Medicare Provider Number\*: 0000000A

Medical Registration Number: 123456

HPI-I: [Field]

HPI-O: 123456789098765

Name: Full name, Dr Name [Field]

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

Buttons: Submit, Preview

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

**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

Print

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

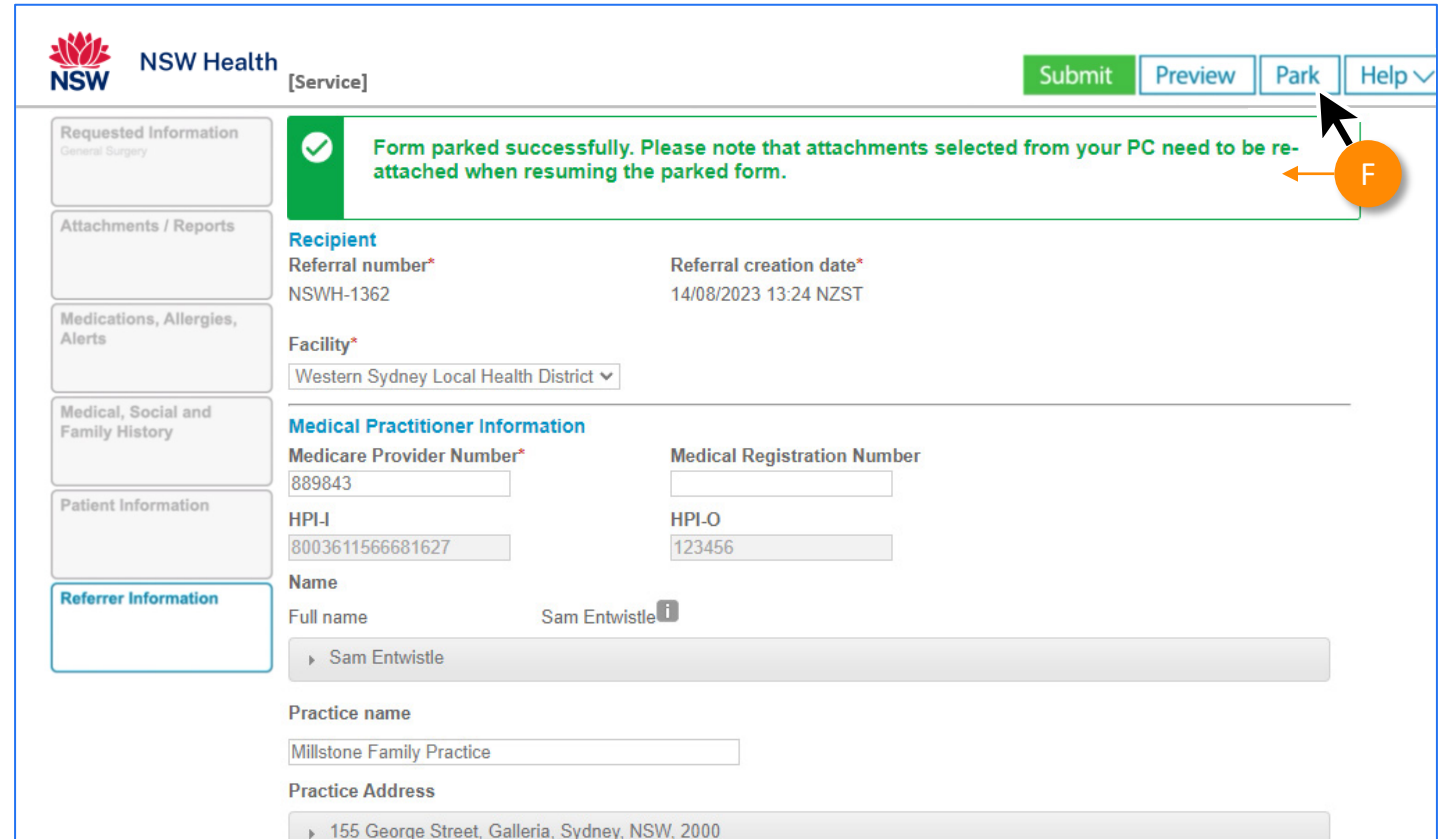
Referral Date: 14/08/2023

Referral Type: New

## 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 "NSW Health [Service]". At 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". 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
  - Practice name: Millstone Family Practice
  - Practice Address: 155 George Street, Galleria, Sydney, NSW, 2000

## Step 5:

# Accessing parked and auto-saved forms

**A** To access parked or auto-saved forms, from the patient's record, select the **HealthLink** tab.

**B** From the available list, **double-click on the Parked or AutoSaved** form you would like to open.

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

**C** You can also use this area to see previously **submitted** forms.

The screenshot shows the MedicalDirector Clinical 4.0 interface for a patient named 'MR TEST PATIENT (71yrs 6mths)'. The patient's details, including DOB (01/01/1950), gender (Male), and address (1 Furzer Street, Phillip, Act 2606), are visible. The 'HealthLink' tab is selected in the top navigation bar. Below the patient information, a table lists 8 records of forms. The first record, dated 8/07/2021 at 12:28:53 p.m., is marked as 'Parked' and is highlighted in blue. A mouse cursor is pointing at this record. Other records include 'Submitted' and 'Autosaved' forms from various dates. The bottom of the screen shows the user's name 'Dr Medical Director (MD-Test Healthlink (Marketplace Partner))' and the date 'Thursday, 8 July 2021'.

Date Created	Form Status	Message ID	Type	Subject	Description	Recipient	Sender	Ack Status
8/07/2021 12:28:53 p.m.	Parked							
8/07/2021 12:16:15 p.m.	Submitted							
8/07/2021 11:30:27 a.m.	Autosaved							
8/07/2021 11:12:18 a.m.	Submitted							
18/10/2019 11:07:47 a.m.	Autosaved							
9/10/2019 3:54:31 p.m.	Submitted							
1/10/2019 4:11:29 p.m.	Submitted							
24/09/2019 3:52:07 p.m.	Submitted							

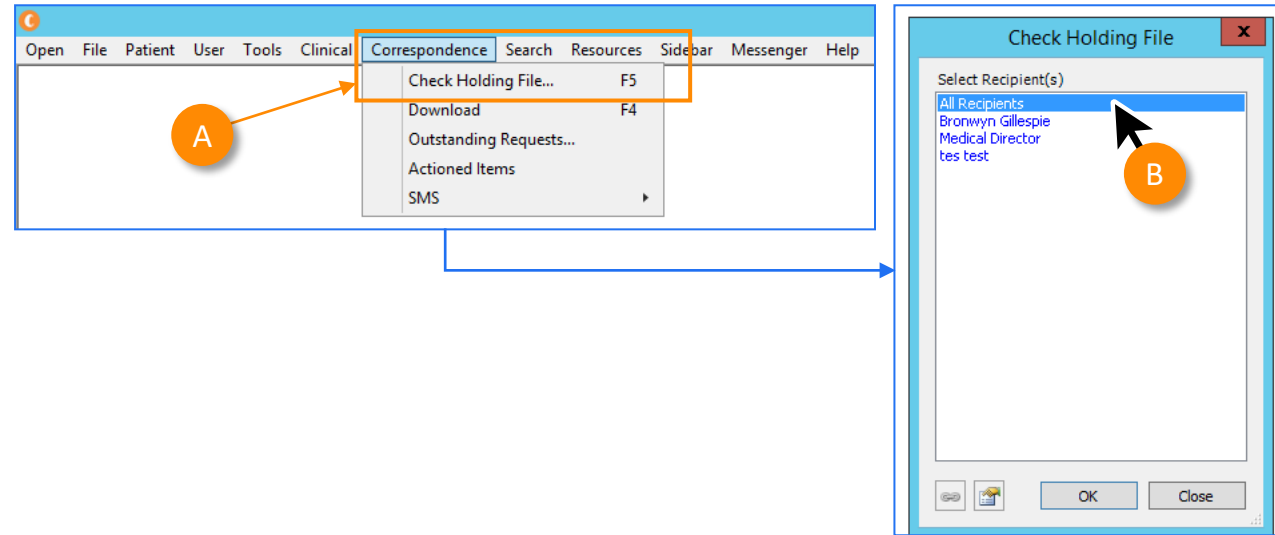
## Step 6: Accessing submitted forms

- A** A copy of the submitted form can be viewed by selecting the **Letters** tab
- B** and then **Double-clicking the submitted form**.
- C** Alternatively, if you have the preview panel enabled, simply click the **Open Externally** button on the letter preview.

The screenshot displays the MedicalDirector Clinical 4.0 interface for a patient named MR TEST PATIENT (71yrs 6mths). The top navigation bar includes tabs for Summary, Current Rx, Progress, Past history, Results, Letters, Documents, Old scripts, Imm., Correspondence, MDExchange, and HealthLink. The 'Letters' tab is selected, and a table of 5 records is shown. A mouse cursor is double-clicking a record in the table, with a callout 'B' indicating this action. The 'Open Externally' button is highlighted in the right-hand preview panel, with a callout 'C'. The preview panel shows a form sent on 22/10/2023 09:34 AEST for patient MICKEY HEATLEY. The form includes fields for Sensitive: Personal, [Service][Facility], Patient: MICKEY HEATLEY, 81yrs, M, DOB 17/12/1941, PH: 0401 201 2011, Wk 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, and Clinical Referral Information. The bottom status bar shows 'Dr Medical Director (MD-Test Healthlink (Marketplace Partner)) MD Live Data - UAT-MD-SVR\HCNSQL07 Thursday, 8 July 2021 2:03:10 PM'.

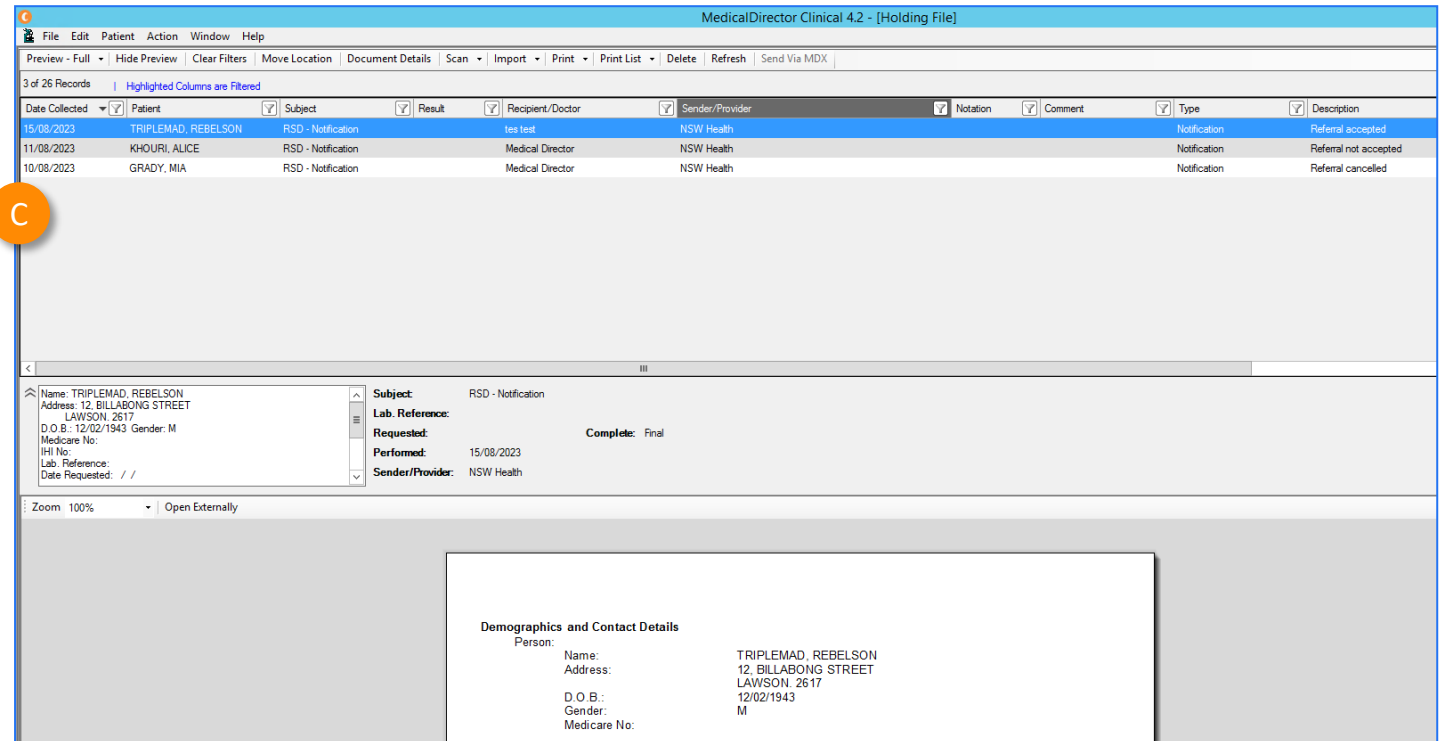
## Step 7: What happens after a referral has been made?

- 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 **Correspondence** from the menu and select **Check Holding File...**
- B** **Select Recipient(s):** who the messages are addressed to e.g. Yourself or All Recipients.
- C** Here you can open and view incoming reports and allocate them to other users or to the patient.



## 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 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	Medical Certificate for Insurance Claim
Cardiometabolic Health in Psychosis	<b>NSW Health Outpatient Referrals - [LHD Name]</b>
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	

NSW Health Gastroenterology & Liver Clinics

Submit | Preview | Park

**Requested Information** ⚠️ Gastroenterology & Liver Clinics

Referred To\* Please Select

*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\* 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.

**Referrer Information** Reason for referral\* Please select

**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



## Customer Care

Phone: 1800 125 036

Email: [helpdesk@healthlink.net](mailto:helpdesk@healthlink.net)

Monday to Friday (Except Public Holidays)

8:00am – 6:00pm

[www.healthlink.com.au](http://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.