

# QUICK START GUIDE

## SR SPECIALISTS & REFERRAL SMARTFORM – GENIE

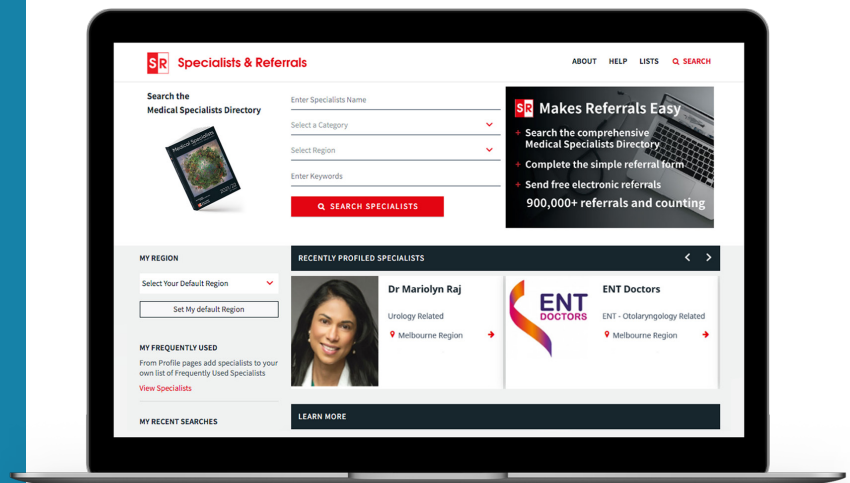
The SR Specialists & Referral Smartform has been designed to make it easier for you to receive electronic referrals and to refer your patients electronically to private specialists. This quick start guide has been developed to help you navigate receiving & sending SR referrals using the new digital form in **Genie**.

SR Support

**1800 147 047**

[specialistsreferrals.com.au](http://specialistsreferrals.com.au)

[sr-support@specialistsreferrals.com.au](mailto:sr-support@specialistsreferrals.com.au)



HL SR Specialists & Referrals		Referral to Andrew Chia	
<b>Requested Information</b> Specialist Referral	Name	Andrew Chia	
	Fax	03 9928 6289	
	Phone	03 9928 6288	
<b>Attachments / Reports</b> No reports selected No files attached	Street Address	East Melbourne, 171 Grey St, East Melbourne VIC 300	
<b>Medications / Warnings</b> 4 long term medications specified No medications specified 1 medical warning specified	Referral Date*	08/11/2019	
<b>Medical History</b> Medical history specified	Referral Continuation*	<input checked="" type="radio"/> New <input type="radio"/> Continuation	
<b>Patient Information</b> Fred Andrews QPCV2140F 23/02/1923	Referral Period*	12 months	
<b>Referrer Information</b> Carmel Corvin 0000000Y	Feedback Requested*	<input checked="" type="radio"/> Yes <input type="radio"/> No	
	Interpreter Required*	<input type="radio"/> Yes <input checked="" type="radio"/> No	
	<input type="checkbox"/> Urgent		
	Reason for Patient Referral*	<a href="#">Browse for Consultation Notes</a>	

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## Welcome to SR Specialists & Referrals

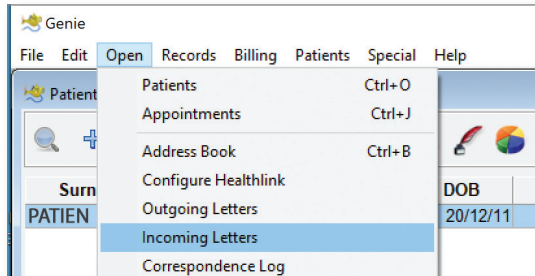
Thank you for taking time to review the SR Specialists & Referrals service – we hope you find it helpful and easy to use.

- SR Specialists & Referrals is the online version of the Medical Specialists NSW & ACT and VIC & TAS Directories. All private specialists are in the directory and some specialists pay for a premium entry.
- SR Specialists & Referrals is a collaboration between the Medical Specialists Directory published by Cervin Media and HealthLink.
- You can receive SR referrals and use SR to refer to all specialists – those setup for electronic secure messaging and those that are still “manual” (fax, hand to patient).
- There is no install or setup required – the service is fully live now from the HealthLink Smartforms page in Genie.
- You can see the delivery status of all electronic referrals in Genie.
- We welcome your feedback and suggestions for future improvements to this service.

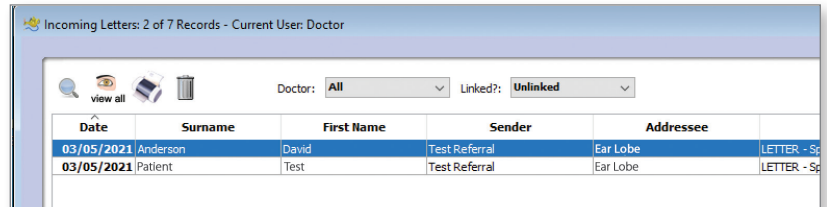
## Part 1: Receiving SR Referrals

### 1 Finding Your SR Referrals in Genie

#### 1.1 Open Incoming Letters



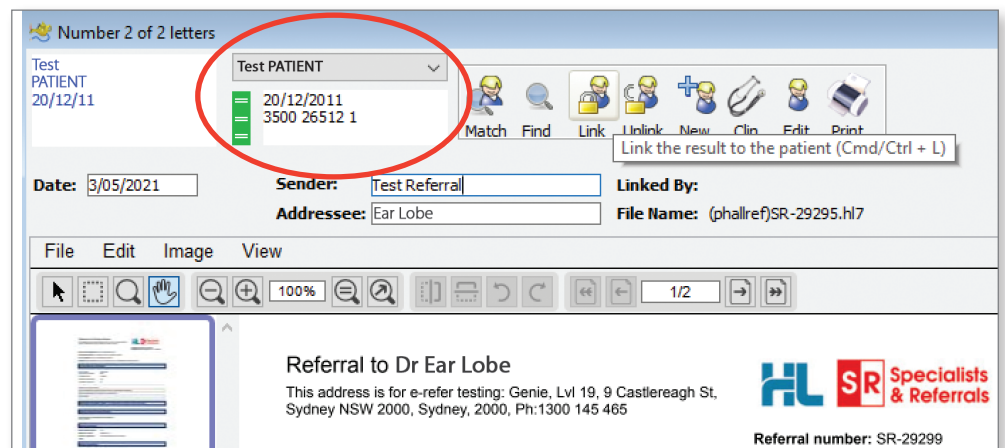
#### 1.2 Then Double click on the Referral to open it



### 2 Linking a Referral to an Existing Patient

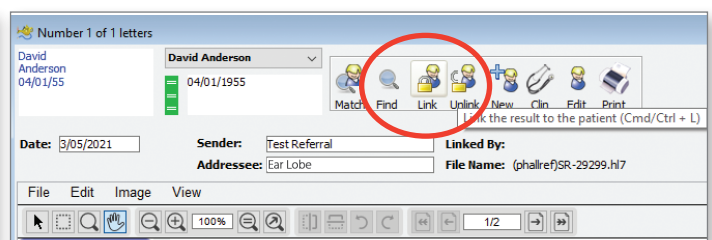
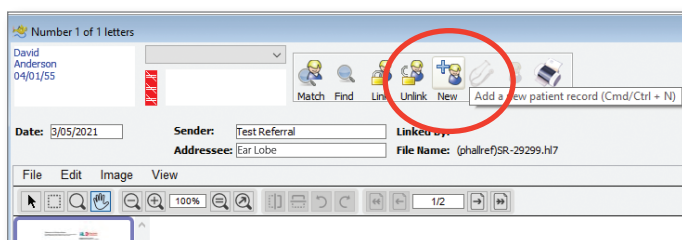
If the Patient exists in your database you can link the referral to the existing patient record.

The green equals sign shows the referral information matches with a patient record.

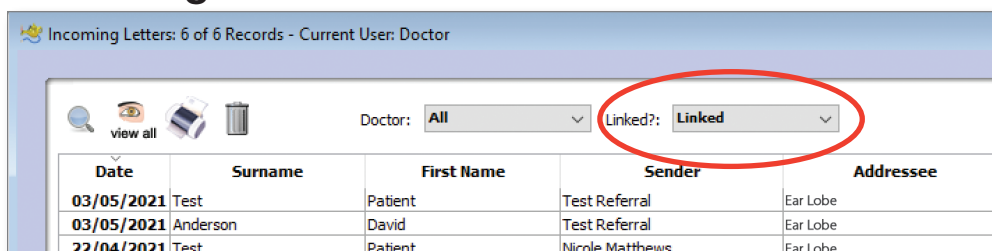


### 3 Creating New Patient from a Referral

If the patient is not in your database, then the red equals signs show the referral information does not match an existing patient. Click on the New button to create a patient record from the referral letter and then link the referral to the patient record.



### 4 Finding Linked Referrals



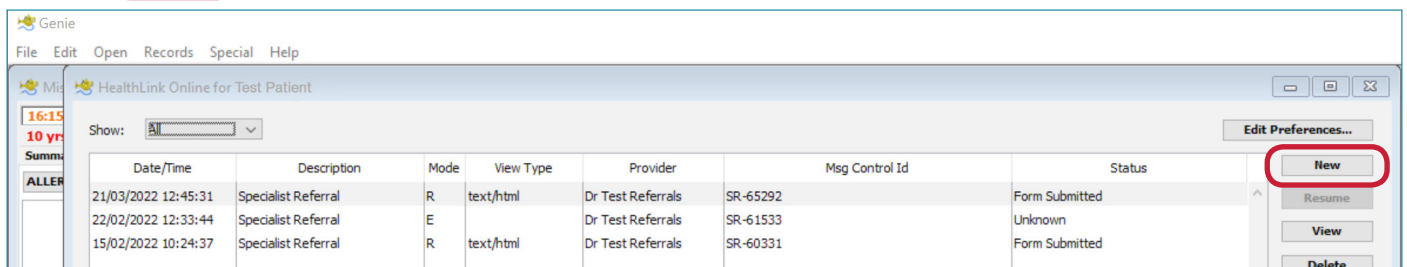
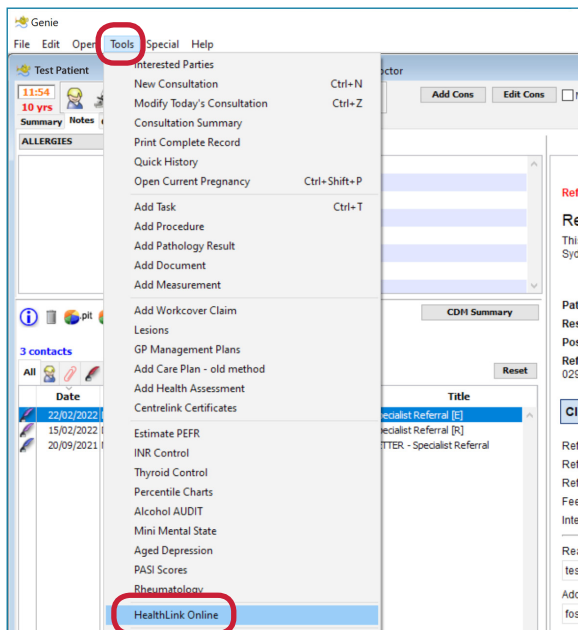
- + Once the referral has been linked it will not be visible in 'Incoming Letters' by default
- + Select 'Linked' from the drop down menu to view linked referrals

## Part 2: Sending SR Referrals

### 1 Making a SR referral in Genie

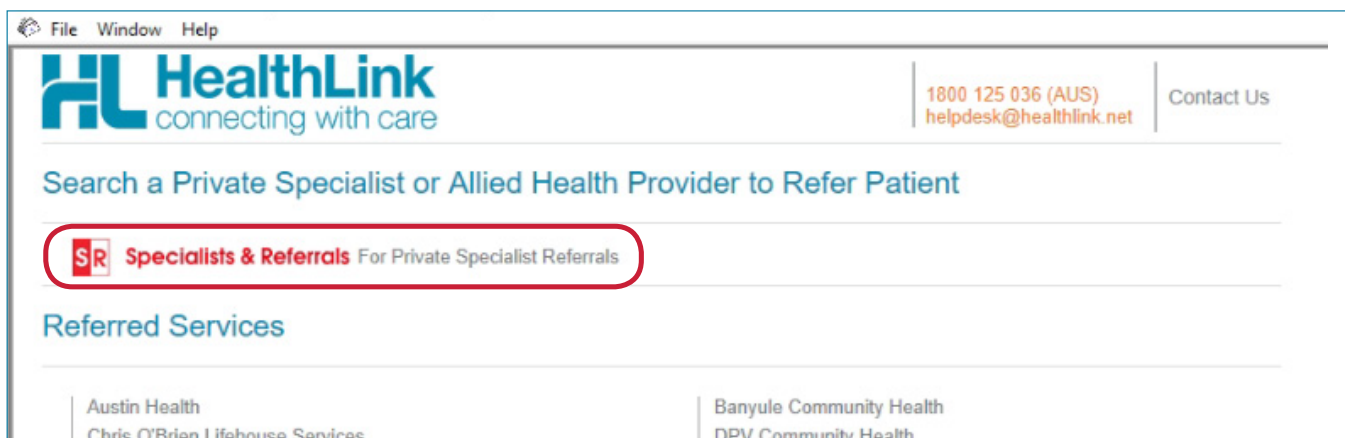
#### 1.1 Open the Patient Record and HealthLink Forms Window

From within the patient clinical record in Genie, from the menu select **Tools** then **HealthLink Online**. Then select New to open the Healthlink Forms Page.



#### 1.2 Open SR Specialists & Referrals

Under the Search a Private Specialist section, click on **For Private Specialist Referrals**.



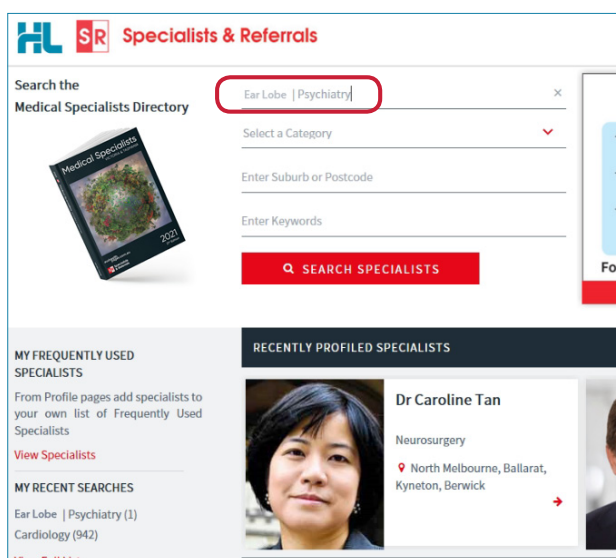
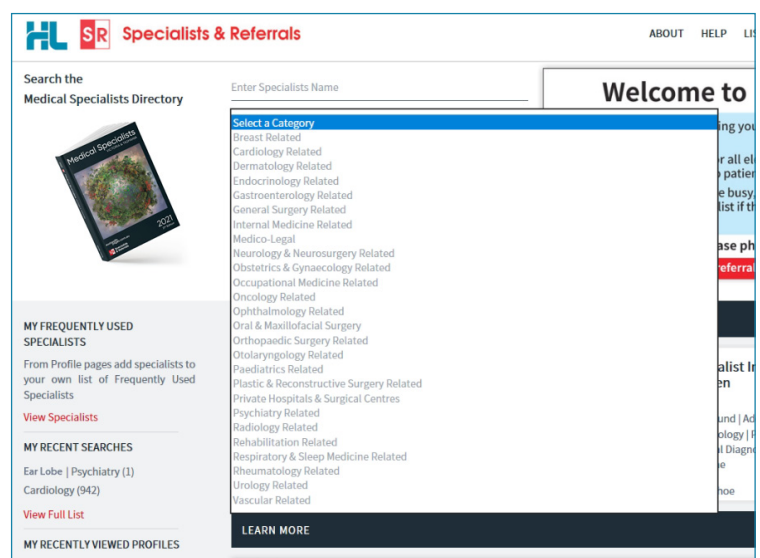
## 2. Select the Specialist to Refer to

### 2.1 Search By Name

Type in the Specialists Name and click [Search Specialists](#). The specialist will come up along with other profiled suggestions. Just click on the name to view the full specialist profile.

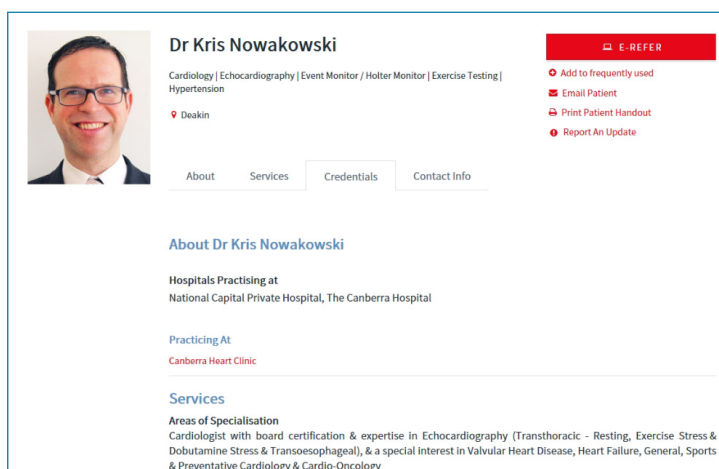
### 2.2 Search by Category and Location

You can select a category for your search by clicking on the select a category box. If the category is not in the drop down list, just enter the keywords and the category will come up. Once you have entered the information you require, click on the search button. You can also add a suburb or postcode to make it closer to your patient's location.

### 2.3 View Specialist Profile

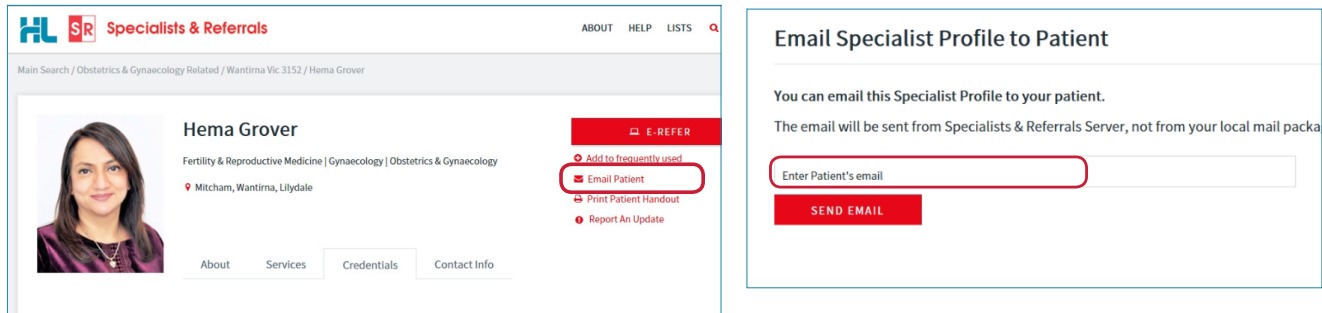
Here you can read about the specialist and decide on the appropriateness for your patient.





### 3. Email Patient the Specialist's Profile

Click on [Email Patient](#), then type in your patient's email address and click [Send Email](#).

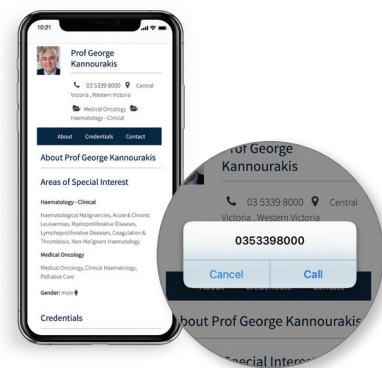


The screenshot shows the SR Specialists & Referrals website. On the left, the profile for Hema Grover is displayed, including her photo, name, specialty (Fertility & Reproductive Medicine | Gynaecology | Obstetrics & Gynaecology), and location (Mitcham, Wantirna, Lilydale). To the right of the profile, there is a red 'E-REFER' button and a list of actions: 'Add to frequently used', 'Email Patient' (highlighted with a red circle), 'Print Patient Handout', and 'Report An Update'. On the right side of the page, there is a form titled 'Email Specialist Profile to Patient'. The form contains the text: 'You can email this Specialist Profile to your patient. The email will be sent from Specialists & Referrals Server, not from your local mail packa'. Below this text is a text input field labeled 'Enter Patient's email' and a red 'SEND EMAIL' button.

We manage the email process so when your patient receives the email, it will say it is from SR Specialists and Referrals, keeping your email address private. The patient will be able to view the Specialist's profile through the website [aushealthpages.com.au](http://aushealthpages.com.au). The patient will now have the specialist's details in case they misplace the referral, and with those details it is simpler for them to call the specialist to make their appointment. If your patient is unsure who they want to see, you can email multiple specialists' profiles to them so they can decide who they would feel more comfortable with.

Your patient can view all the information you see regarding the specialist, their services, qualifications and experience – and then your patient can just click to call and book their appointment.

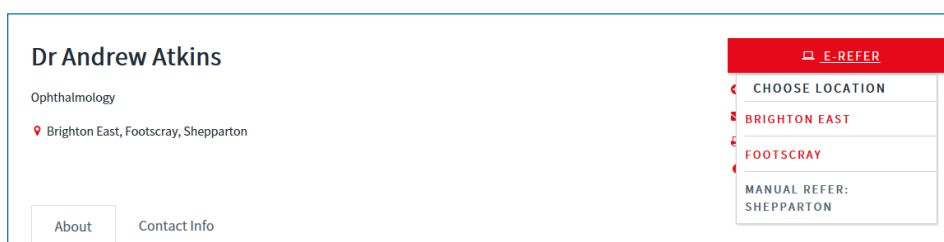
You can also click [Print Patient Handout](#) (link under Email Patient) to print off the specialist profile for your patient.



### 4. Select the Referral Location – E-Refer or Manual Refer

You can send the E-Referral to the practice, or to a particular specialist at one of their consult locations. If the E-Refer button is not displaying for the organisation, then the profile page will list all the specialists working there. Click on a specialist name to send the referral to the specific specialist at the organisation.

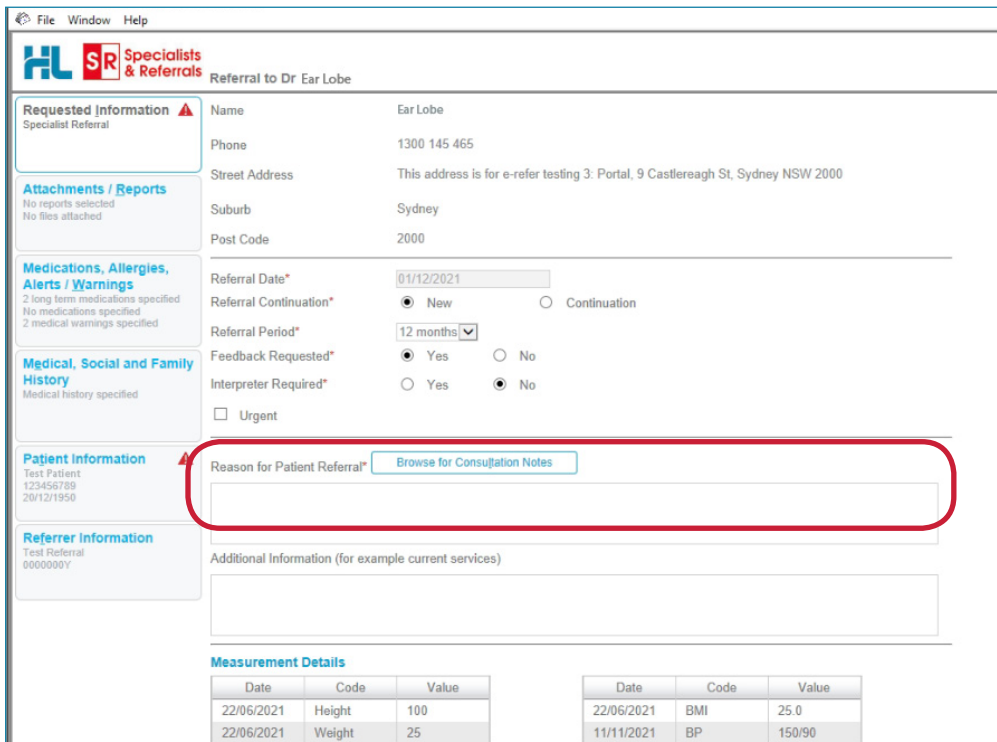
Hover over the red [E-REFER](#) or grey [MANUAL REFER](#) button to the right of the specialist's page. A drop-down list of locations will display for you to choose from. Choose a location showing in red to send a referral electronically. You can complete the smartform referral and it will be saved in the patient record. A location will show in grey if electronic messaging has not been set up there. It is exactly the same process to complete the manual SR referral, but the referral must be printed out and faxed or given to the patient. The manual referral will still be saved into the patient record, including a message that it has not been sent electronically. You cannot add attachments to manual referrals.



The screenshot shows the SR Specialists & Referrals website. On the left, the profile for Dr Andrew Atkins is displayed, including his name, specialty (Ophthalmology), and location (Brighton East, Footscray, Shepparton). To the right of the profile, there is a red 'E-REFER' button. Below the button is a dropdown menu with the following options: 'CHOOSE LOCATION', 'BRIGHTON EAST' (highlighted in red), 'FOOTSCRAY' (highlighted in red), and 'MANUAL REFER: SHEPPARTON'.

## 5. Complete the Referral Form

The form will be displayed. You will have access to all the information necessary to complete the form for submission. Work through the six tabs down the screen starting with [Requested Information](#).



**Requested Information**  
Specialist Referral

Name: Ear Lobe  
Phone: 1300 145 465  
Street Address: This address is for e-refer testing 3: Portal, 9 Castlereagh St, Sydney NSW 2000  
Suburb: Sydney  
Post Code: 2000

Referral Date\*: 01/12/2021  
Referral Continuation\*: ☒ New ☐ Continuation  
Referral Period\*: 12 months  
Feedback Requested\*: ☒ Yes ☐ No  
Interpreter Required\*: ☐ Yes ☒ No  
☐ Urgent

**Attachments / Reports**  
No reports selected  
No files attached

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

**Medical, Social and Family History**  
Medical history specified

**Patient Information**  
Test Patient  
123456789  
20/12/1990

**Referrer Information**  
Test Referral  
0000000Y

Reason for Patient Referral\* [Browse for Consultation Notes](#)

Additional Information (for example current services)

**Measurement Details**

Date	Code	Value
22/06/2021	Height	100
22/06/2021	Weight	25

Date	Code	Value
22/06/2021	BMI	25.0
11/11/2021	BP	150/90

The [Reason for Patient Referral](#) is required information – type into this field or Browse your consultation notes and select the appropriate notes to attach.

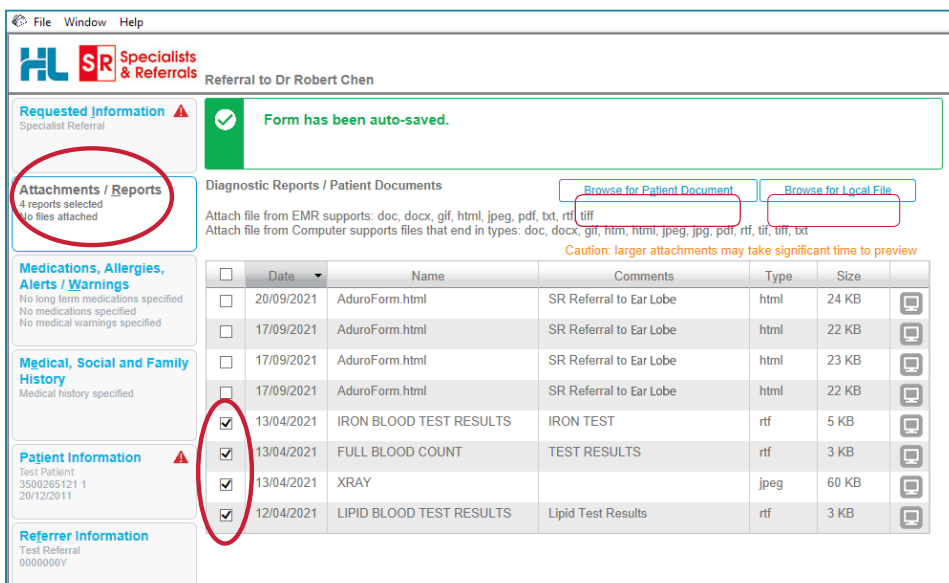
You may specify the referral period. If the referral is urgent tick the urgent box and give a reason.

## 6. Include Attachments

The [Attachments / Reports](#) tab will give you access to the supporting pathology, radiology or other documents you need to attach to the form. Select an attachment from the table – this table shows attachments in your patient's record from the last six months. If you want to attach an older document, choose [Browse for Patient Document](#) and set an earlier date.

You can also attach records from your computer by choosing [Browse for Local File](#).

The SR form supports documents in the doc, docx, gif, htm, html, jpeg, jpg, rtf, tif, tff & txt formats. You can preview the document before attaching it by clicking the computer icon to the right.



**Requested Information**  
Specialist Referral

**Attachments / Reports**  
4 reports selected  
No files attached

**Medications, Allergies, Alerts / Warnings**  
No long term medications specified  
No medications specified  
No medical warnings specified

**Medical, Social and Family History**  
Medical history specified

**Patient Information**  
Test Patient  
3500265121  
20/12/2011

**Referrer Information**  
Test Referral  
0000000Y

Form has been auto-saved.

Diagnostic Reports / Patient Documents

[Browse for Patient Document](#) [Browse for Local File](#)

Attach file from EMR supports: doc, docx, gif, html, jpeg, pdf, txt, rtf, tiff  
Attach file from Computer supports files that end in types: doc, docx, gif, htm, html, jpeg, jpg, pdf, rtf, tif, tff, txt

Caution: larger attachments may take significant time to preview


<input type="checkbox"/>	Date	Name	Comments	Type	Size	
<input type="checkbox"/>	20/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	24 KB	
<input type="checkbox"/>	17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	22 KB	
<input type="checkbox"/>	17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	23 KB	
<input type="checkbox"/>	17/09/2021	AduroForm.html	SR Referral to Ear Lobe	html	22 KB	
<input checked="" type="checkbox"/>	13/04/2021	IRON BLOOD TEST RESULTS	IRON TEST	rtf	5 KB	
<input checked="" type="checkbox"/>	13/04/2021	FULL BLOOD COUNT	TEST RESULTS	rtf	3 KB	
<input checked="" type="checkbox"/>	13/04/2021	XRAY		jpeg	60 KB	
<input checked="" type="checkbox"/>	12/04/2021	LIPID BLOOD TEST RESULTS	Lipid Test Results	rtf	3 KB	

## 7. Medications, Warnings and Medical History


These tabs are pre-populated with data from the patient's medical record. All medications are shown, and you have to remove them if you think they are unnecessary or sensitive in nature.

To remove a current or long-term medication from the referral (not the medical record), click the cross on the right-hand side of the item you wish to remove. You may also add further detail in the comments sections.

File Window Help



Referral to Dr Ear Lobe

Requested Information 

Specialist Referral

Attachments / Reports


No reports selected  
No files attached

Medications, Allergies, Alerts / Warnings

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

Medical, Social and Family History


Medical history specified



Patient Information 


Test Patient  
123456789  
20/12/1950

Referrer Information

Test Referral  
0000000Y

Current Medications 

Date	Details	Dose	Units	Instructions	
	RAMIPRIL (Ramipril)			Dosage: daily Qty:30	
	LIPITOR (Atorvastatin (as calcium))			Dosage: 1 daily Qty:30	

Past Relevant Medications 

[Browse for More Medications](#)


Date	Details	Dose	Units	Instructions	
No records found.					

Allergies and Alerts


<input type="checkbox"/>	Date	Description	Comments
<input checked="" type="checkbox"/>	11/11/2021	FIBRATES	Swelling
<input checked="" type="checkbox"/>	NaN/NaN/NaN	Allergy to Fibrates	

Clinical Medication Comments

File Window Help



Referral to Dr Ear Lobe

Requested Information 

Specialist Referral

Attachments / Reports


No reports selected  
No files attached

Medications, Allergies, Alerts / Warnings

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

Medical, Social and Family History

Medical history specified

Patient Information 

Test Patient  
123456789  
20/12/1950

Referrer Information

Test Referral  
0000000Y

Long Term Classifications (Co-Morbidities)

<input type="checkbox"/>	Code	Description	Comments
<input type="checkbox"/>		Psoriasis	
<input type="checkbox"/>		Diabetes Mellitus - Type II	
<input type="checkbox"/>		Hyperlipidaemia	
<input type="checkbox"/>		Hypertension	

Patient History

<input type="checkbox"/>	Code	Description	Comments
<input type="checkbox"/>		Has been a well known celebrity.	

Family History

<input type="checkbox"/>	Code	Description	Comments
<input type="checkbox"/>		Father had diabetes	

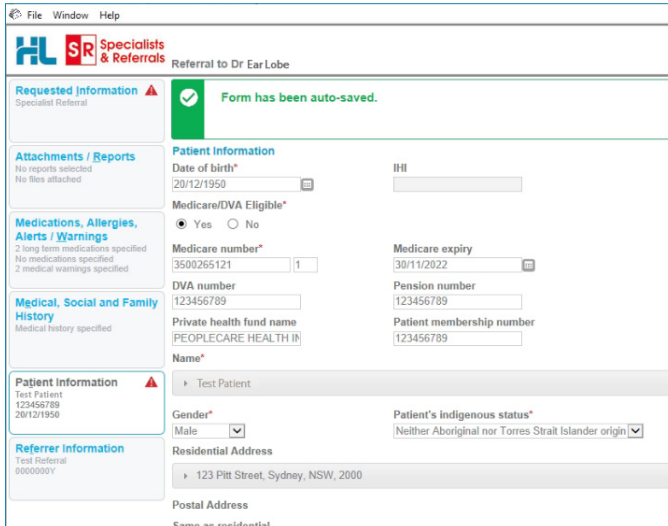
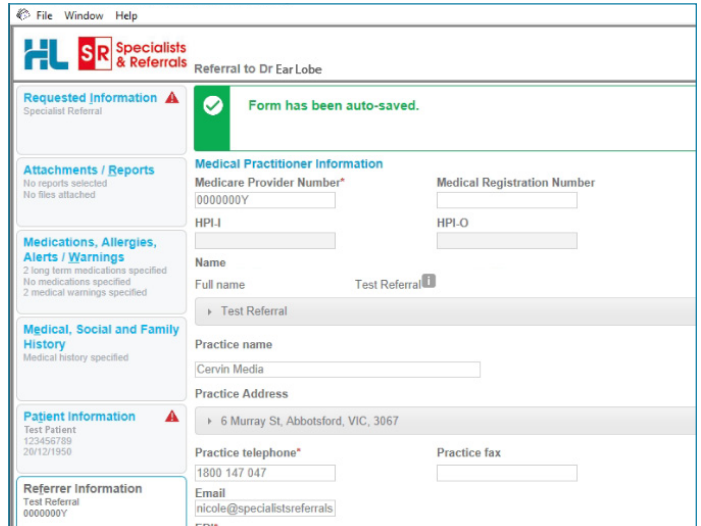
Smoking History and Additional Information

Smoking status: Ex-smoker; Frequency: ; No. of cigarettes: 1; Year commenced: 2000; Last quit attempt: Never/Unknown



## 8. Check Patient and Referrer Information

With the [Patient Information](#) and [Referrer Details](#) tabs, you simply need to ensure that the information is correct. The form will ask you to complete any missing information before it can be sent.

## 9. Submit the Form

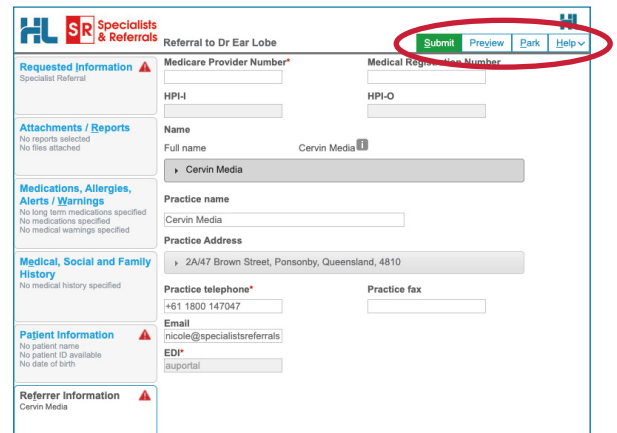
[Submit](#) sends the electronic referral to the specialist. This referral is securely encrypted and delivered by HealthLink.

[Preview](#) allows you to look over the form before sending it. No attachments will be visible on Previewed referrals but they will be included on the referral delivered to the specialist.

[Park](#) allows you to complete the form and send it at a later date, if needed.

To send a parked or previewed referral click Submit.

All sent referrals will be copied into the patient record. You will also see the acknowledgement / referral status in the patient record.



### 9.1 Completing Manual Referrals

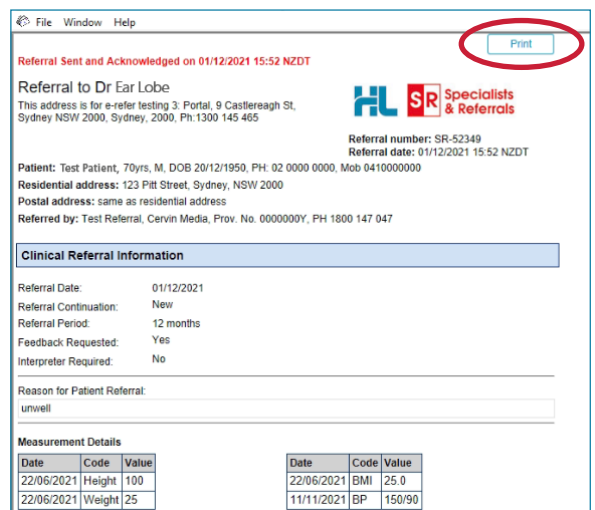
For Manual Referrals the steps are almost the same except you cannot attach any results or X-rays, these need to be printed separately. At the end you will click [Print](#) instead of Submit, the referral will still save in that patient's file. Then you can either fax the referral or hand it to the patient to take with them.

### 9.2 Print Referral

If needed, you can print a copy of the Referral by right-clicking on area of the submitted forms and choosing [Print](#).

### 9.3. Practice doing a Referral

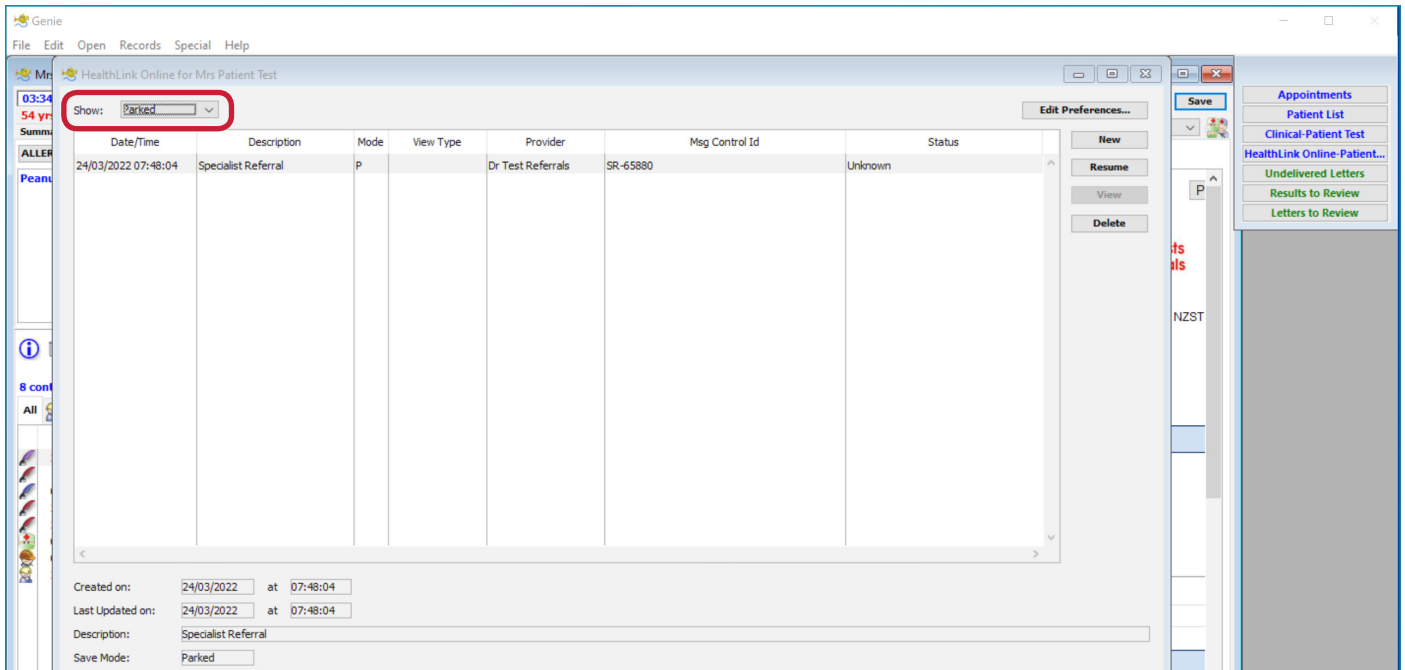
We have set up a test specialist called Ear Lobe. Search for Ear Lobe and do a practice referral as many times as you like. We suggest you use a fake patient to practice this.



## 10. Managing Referrals

### 10.1 Access Parked Referrals

To access a parked form from the patient's record, select **Tools** then **HealthLink Online**. From the list you will see the status for each form. Open the **Parked** form with a double click. You can also use this area to see previously submitted or parked/incomplete forms. The Recipient of all manual forms will show as **printfax** in the list.



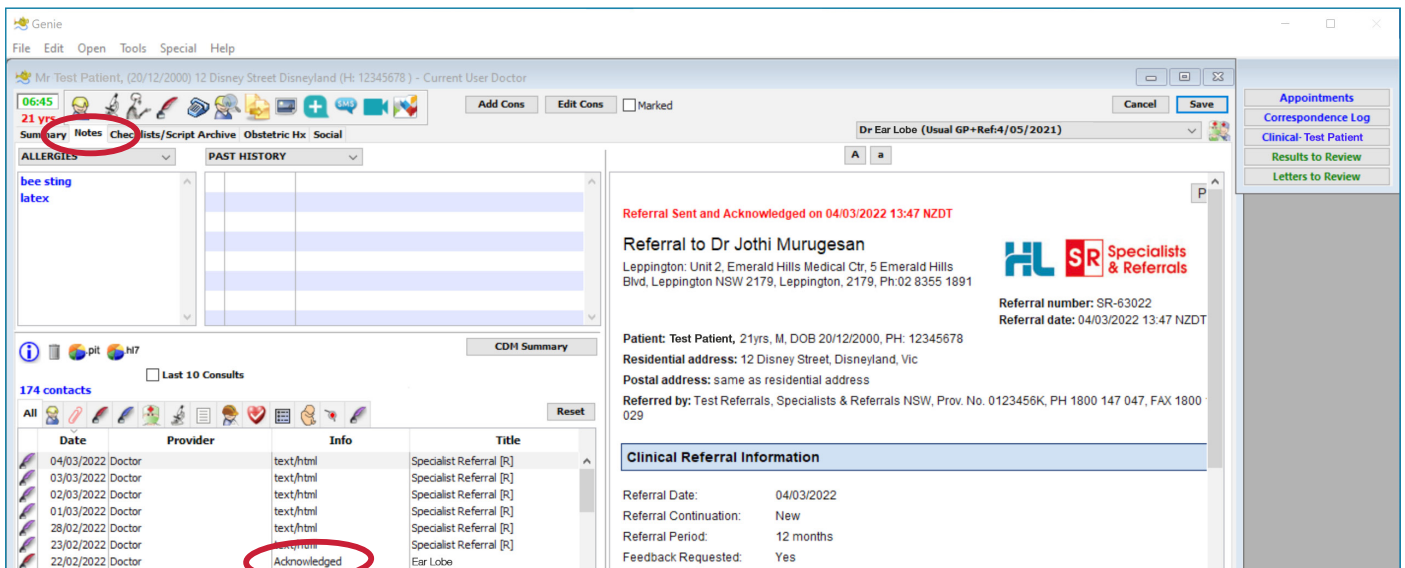
Date/Time	Description	Mode	View Type	Provider	Msg Control Id	Status
24/03/2022 07:48:04	Specialist Referral	P		Dr Test Referrals	SR-65880	Unknown

Created on: 24/03/2022 at 07:48:04  
 Last Updated on: 24/03/2022 at 07:48:04  
 Description: Specialist Referral  
 Save Mode: Parked

### 10.2 Accessing Submitted Referrals

A copy of the submitted referral can be found in the **Notes** section of the patient's clinical record. Double clicking on the form will open it.

The preview will include a list of any attachments. The actual attachments are included in the referral sent to the specialist.



**Referral Sent and Acknowledged on 04/03/2022 13:47 NZDT**

**Referral to Dr Jothi Murugesan**  
 Leppington: Unit 2, Emerald Hills Medical Ctr, 5 Emerald Hills Blvd, Leppington NSW 2179, Leppington, 2179, Ph:02 8355 1891

**Referral number:** SR-63022  
**Referral date:** 04/03/2022 13:47 NZDT

**Patient:** Test Patient, 21yrs, M, DOB 20/12/2000, PH: 12345678  
**Residential address:** 12 Disney Street, Disneyland, Vic  
**Postal address:** same as residential address  
**Referred by:** Test Referrals, Specialists & Referrals NSW, Prov. No. 0123456K, PH 1800 147 047, FAX 1800 029

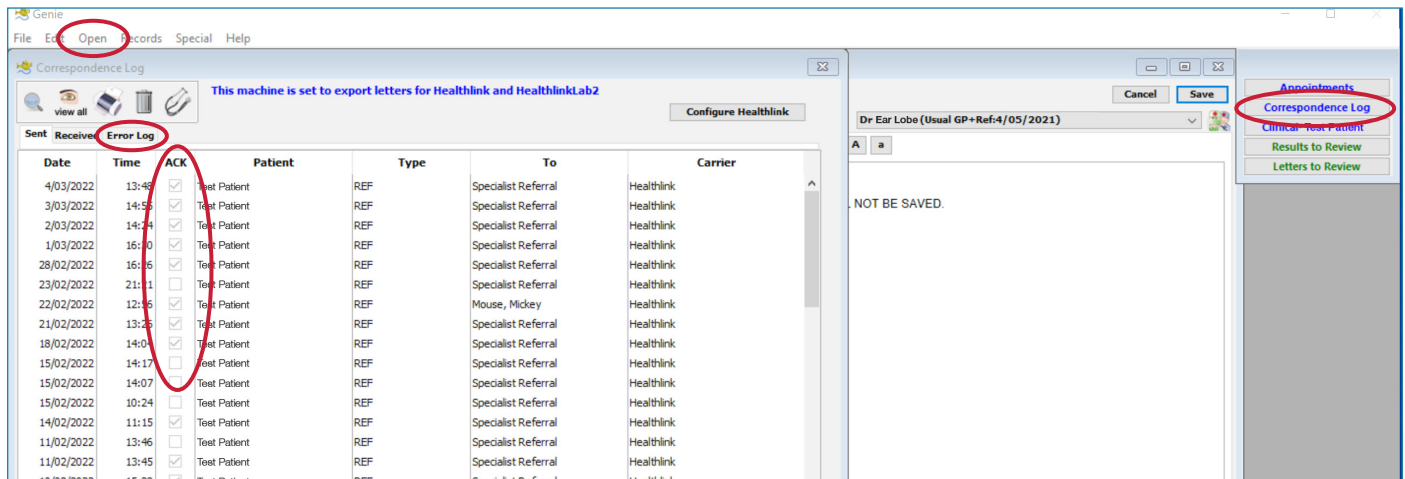
**Clinical Referral Information**

Referral Date:	04/03/2022
Referral Continuation:	New
Referral Period:	12 months
Feedback Requested:	Yes

### 10.3 Checking the Delivery Status of Electronic Referrals

This is how to check the status of electronic referrals you have sent. ACK referrals with a tick have been successfully delivered into the receiver's software. Referrals that haven't been received by the specialist's software will be shown without a tick.

- 1 Close out of the patient record and go to **Open** then choose **Correspondence Log**. This will open a list of all eReferrals to follow up, showing electronic referrals that are still waiting for acknowledgement.



- 2 If you want to see all electronic referrals that have an error, click the Error Log tab

## Support Queries

SR Support can help with any referral tracking queries using the Referral ID 'SR-XXXX'. All patient data is confidential and only visible to the sender and receiver. Find the referral ID in the individual patient record. Please contact SR Support on 1800 147 047 or email [sr-support@specialistsreferrals.com.au](mailto:sr-support@specialistsreferrals.com.au) for:

- specialist contact details and address updates
- queries on receiving electronic referrals
- queries on sending electronic referrals
- to receive a test referral
- for additional staff training