Smart Referrals
User manual

Smart Referrals

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Queensland Government

Important Notice
The Smart Referral is not a substitute for clinical judgement which must be exercised in each consultation in which Smart Referrals is used.

Smart Referrals utilises information extracted from the patient's record in the clinical software in use during the consultation. SNOMED CT coded information is held for the specialities and conditions. The completeness and accuracy of the coded of clinical information in the clinical software is important as it determines the performance of Smart Referrals.

Introduction

This manual provides an overview of the functionality within the Smart Referrals application and the various components within this decision support tool.
The Smart Referrals module has been developed in New Zealand by BPAC Clinical Solutions in partnership with Queensland Health.

Overview

This document is intended to assist users and trainers of the Smart Referrals product. Smart Referrals has in-built referral management capability designed to make life easier for healthcare professionals, and, to improve the quality of referrals.

The referral consists of a generic form and condition specific clinical information - these are auto-populated forms with standard information about the patient, clinical information, and the referrer. The form requires the referring clinician to complete patient specific referral information before the referral can be sent.

Smart Referrals has been designed to assist referring clinicians to maintain standards endorsed by state, national and international guidelines. When the referral is complete, the referral is converted into a PDF and written back to the patient's record in the clinical software.

Launching Smart Referrals

Before launching Smart Referrals, ensure that the clinical software is open and a patient record is open.

Ways to launch

Medical Director

1. Open Medical Director and select a patient.
2. In the Medical Director sidebar click the Smart Referrals button in the Smart Referrals widget (**Figure 1**).
3. Smart Referrals will open in a new window.

If the widget is not visible the sidebar is collapsed. Click the Smart Referrals icon to expand the sidebar then launch Smart Referrals using the widget.

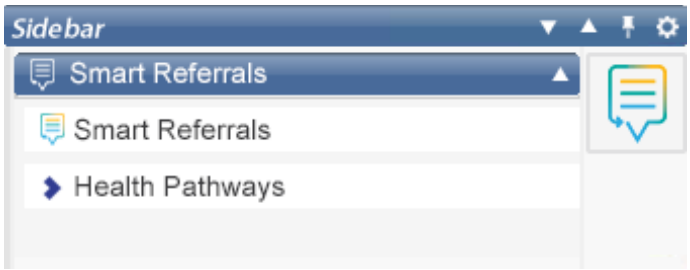


Figure 1: Smart Referrals widget in Medical Director

Best Practice

1. Open Best Practice and select a patient.
2. Launch the Smart Referrals application from the Best Practice from your desktop or start menu.
3. Click the Smart Referrals button in the client (**Figure 2**).

To launch the Smart Referrals application from the desktop, double click the Smart Referrals icon.

Once open, the application will appear in the Windows toolbar, see **Figure 4**.

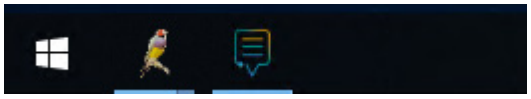


Figure 4: Smart Referrals application in Windows toolbar

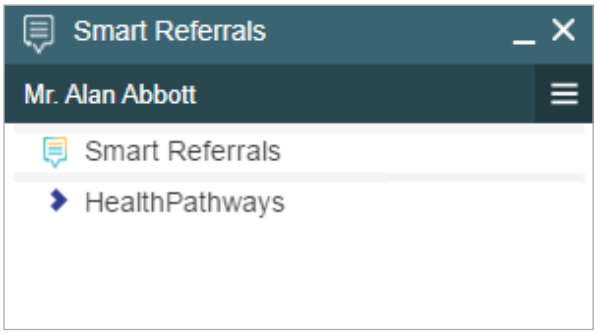


Figure 2: Smart Referrals application

Certificates

Certificates are used to authenticate that a user belongs to their practice. Smart Referrals will prompt for a certificate when opened.

Your practice may have multiple certificates installed, for Smart Referrals select the certificate that begins with **general.800...**, (**Figure 5**) and click **OK.**

If you are not prompted for a certificate, only one is installed on your machine. This has been selected by default and Smart Referrals is ready to use.

> For any certificate issues, contact your practice manager or IT support.

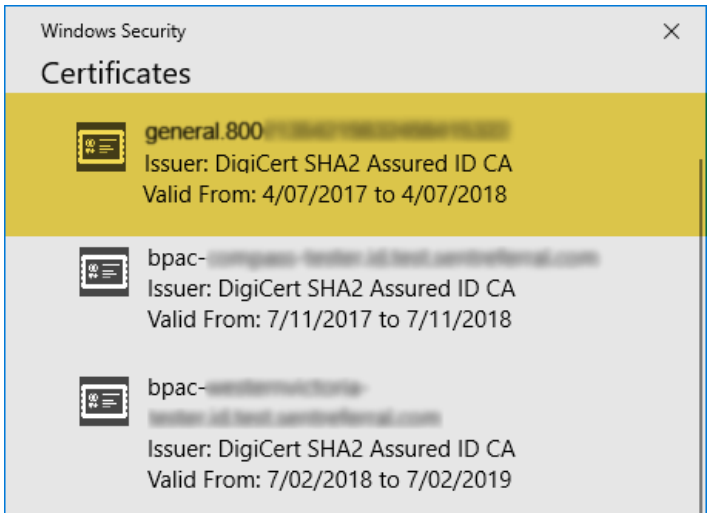


Figure 5: Smart Referrals certificate prompt

Smart Referrals form

Form sections

The Smart Referrals form is divided into the following sections:

- Referral information
- Referral recipient
- Condition specific information
- Standard clinical information
- Patient information
- Insurance information
- Referring GP's information
- Attachments

The referral information section is open by default while all other sections are closed. To open or close a referral section, click anywhere in the grey bar, see **Figure 6**.

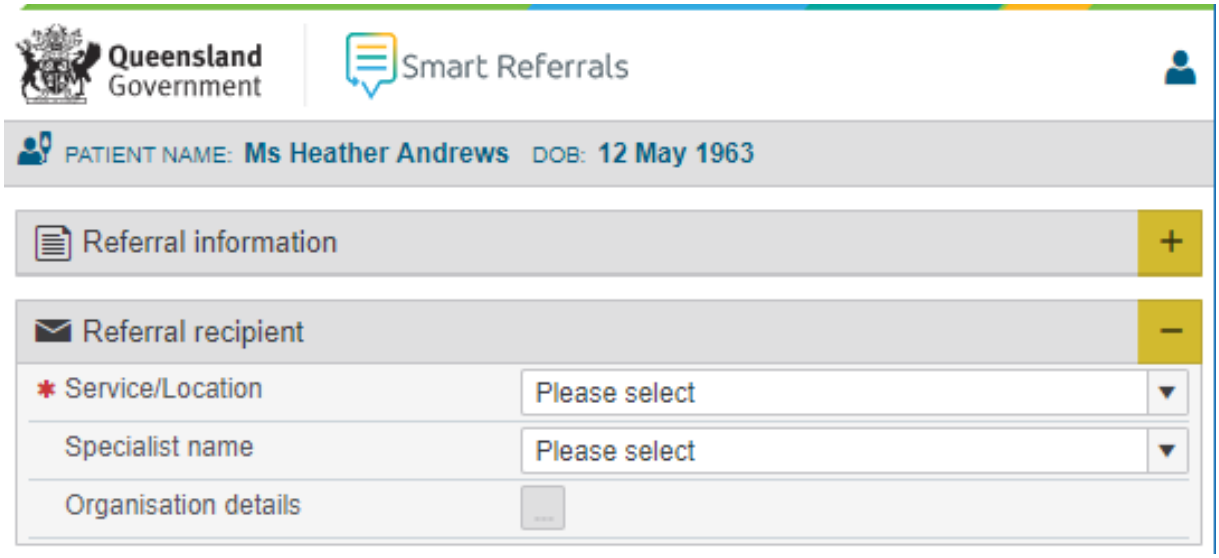


Figure 6: Open/close a referral section.

Referral provider

There are two referral providers: **Queensland Health Smart Referral (QHSR)** and **private**. Select the referral provider using the provider field in the referral information section **(Figure 7)**.

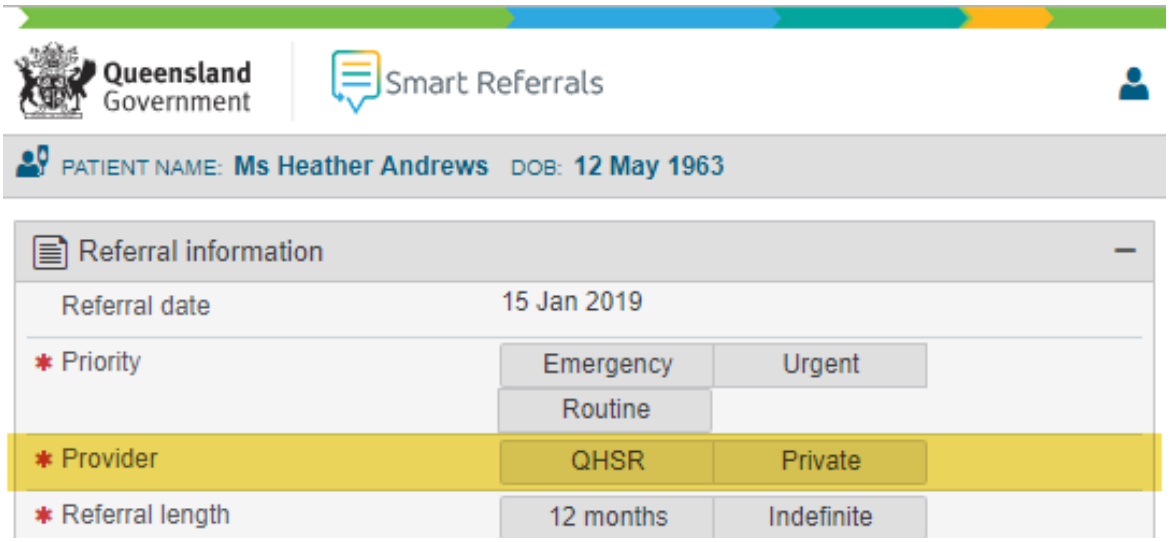


Figure 7: Referral provider field

Queensland Health Smart Referral (QHSR)

If **QHSR** is selected as the provider, the referral information includes a choice of referral type and a different reason for the referral.
QHSR refers to publicly funded services, service locations, organisations and specialist names for public use.

The **referral recipient** section will be displayed if **QHSR** is the provider, see **Figure 8**. This is included to select the provider service, location, and name to determine where to send the referral.

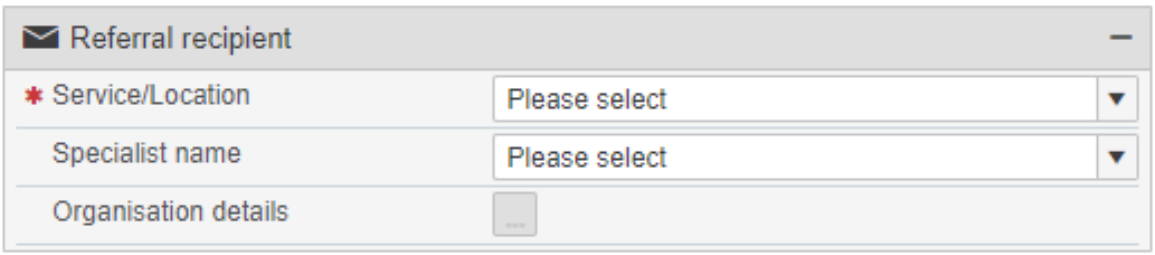


Figure 8: Referral recipient section

Private referrals

On submission a private referral is written back to the clinical software. Once the referral is written back, find the referral, attach any relevant files, and send to the specialist.
The referral recipient section will not display if private is selected.

Condition specific clinical information

Conditions and specialties may have a section for specific clinical information (**Figure 9**). This section is triggered by the selection of condition and specialty in the referral information section, see **Figure 10.**

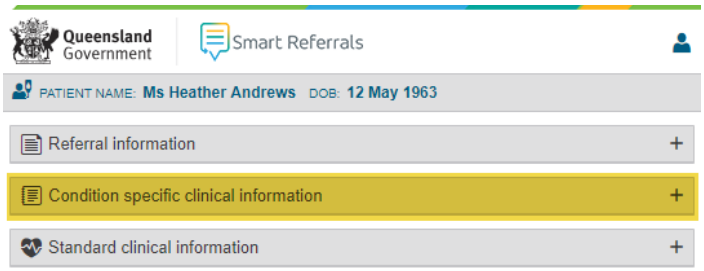


Figure 9: Condition specific clinical information section

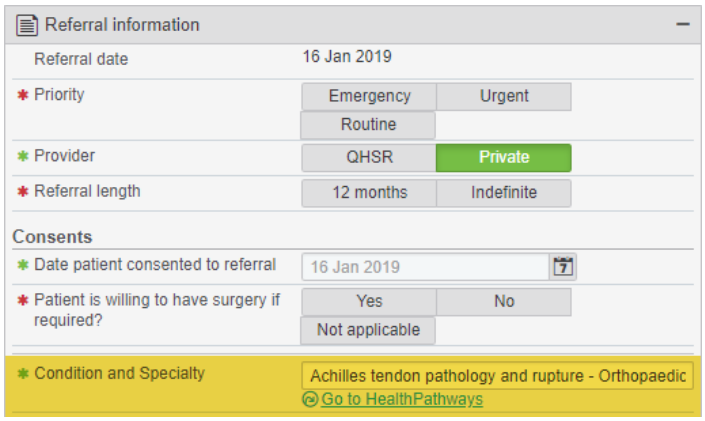


Figure 10: Condition and specialty field

Some conditions and specialties may not require condition specific clinical information, therefore the section will not appear.

After firstly searching for a **Condition and Specialty**, if you're unable to locate the condition you require, you can type the word 'General' and locate the associated specialty. It is important to ensure all search options are exhausted before using this 'general' option as general referrals will *not* contain the inbuilt condition specific referral templates.

Completing the section

The condition specific information section features minimum referral criteria. When selected displays the appointment time criteria for the referral, this could be 90 or 365 days. See **Figure 11**.

You can also record essential referral information, attach pathology and test results, and record imaging and reports.

The content of the section may change based on the chosen condition and/or specialty.

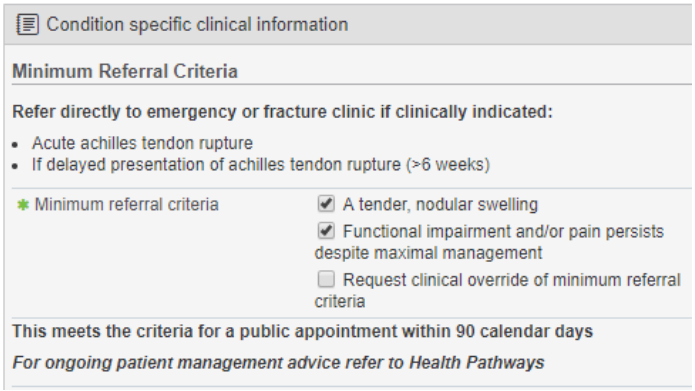


Figure 11: Minimum referral criteria

Referral control buttons

There are four buttons located in the footer that control the referral form, these are **submit**, **cancel**, **refresh**, and **missing fields**. See **Figure 12.**

Figure 12: Referral control buttons

Submit

Once all information is completed, the **submit** button will be enabled. Clicking **submit** opens a preview of the information that will be sent with the referral, see **Figure 13.** Click **Edit** to modify the referral information, click **Submit** to confirm and send the referral.

Cancel

Cancelling a referral will discard all information entered.

Refresh

Refresh updates the Smart Referral form with the most recent data from the clinical software. For example: if a blood pressure reading was added in the clinical software while Smart Referrals is open, clicking **refresh** extracts the new blood pressure value.

> Data is retained when the Smart Referrals form is refreshed.

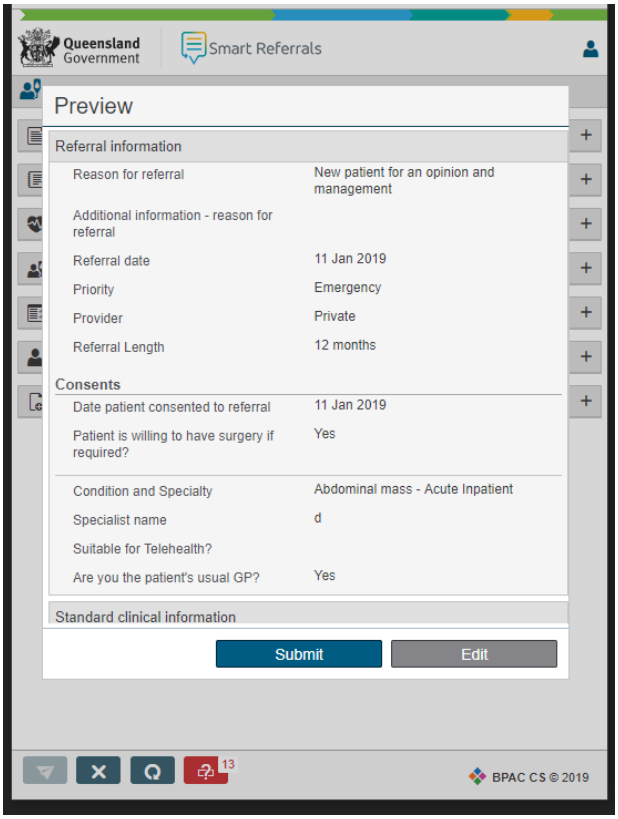


Figure 13: Referral preview

Missing fields

Missing fields are a list of all the incomplete required fields that need to be completed before submitting the referral. The number in the button indicates how many fields need to be completed. The **submit** button will remain disabled until all missing fields are complete.

Click the **missing fields** button to show a list of misssing required fields, see **Figure 14**. Click on the **title** to navigate to the field. When all fields are completed, the **missing fields** button will disappear and the **submit** button enabled.

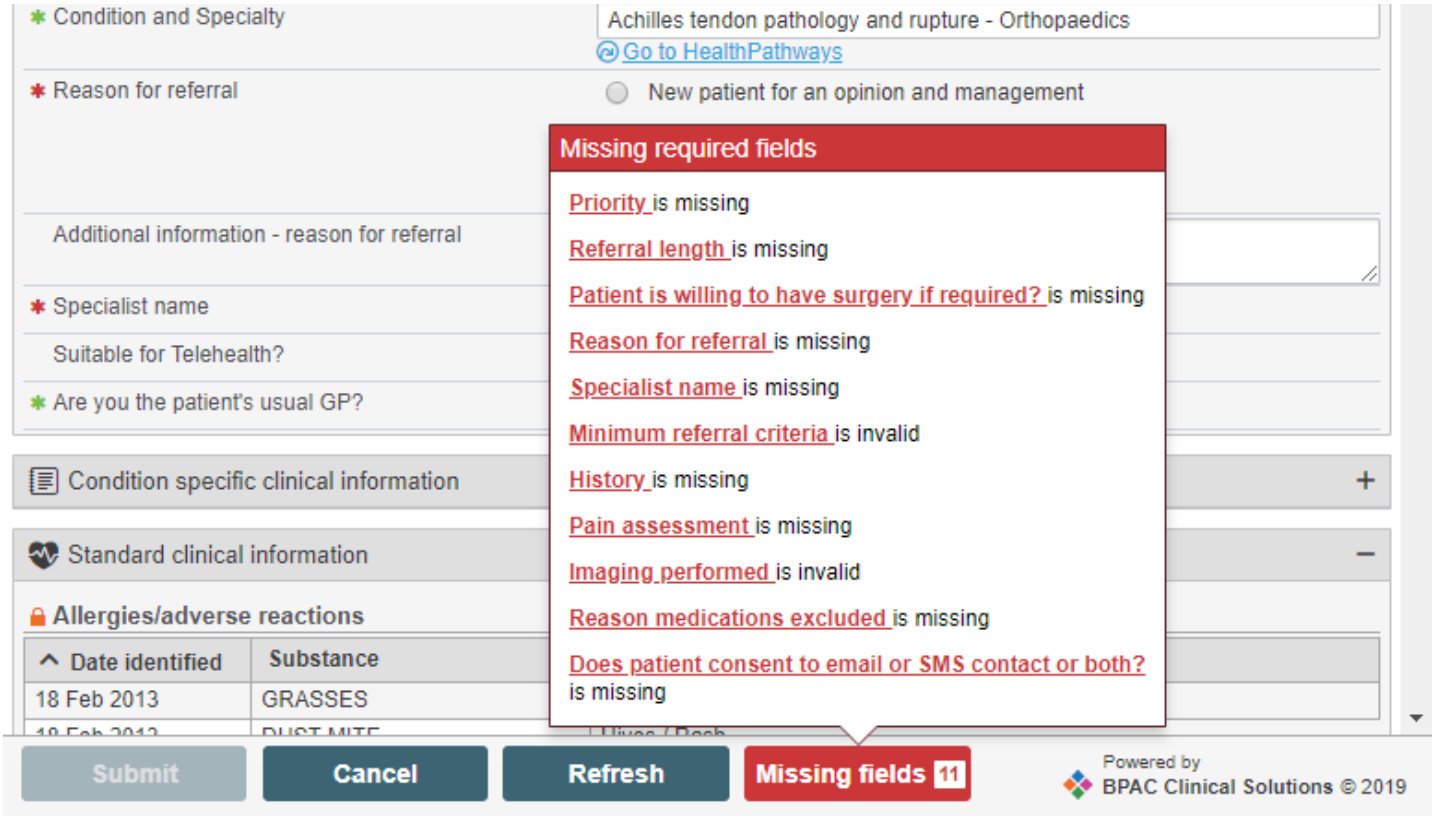


Figure 14: Missing required fields

Form icons

An asterisk indicates a mandatory field. The form will not submit until all of these fields have been completed. When a field is complete the asterisk will change from red to green.

A link that directs to a location on the form.

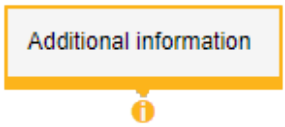
A link that directs to an external location, opening in a new window.

A padlock indicates a field that has been populated from the clinical software, and is not editable within the form. To edit the field update the data in the clinical software and click the refresh button.

The information button indicates details are available that are too large for the form body. Clicking on this opens a popover containing further details, for example patient contact information.

The writeback icon indicates a field that will be written back to the clinical software. To edit the field update the data in the clinical software and click the refresh button.

An info icon indicates there is helpful or important information related to the field. When hovered on, the information is displayed in a tooltip.



Including supporting information in a referral

Clinical software

The standard clinical information accordion will contain clinical data that has been pre-populated from the clinical software including:

- Medical history
- Current medications
- Recent investigations
- Progress notes
- Immunisations

To send clinical data with a referral tick the adjacent checkbox, see **Figure 15.** If no information is displayed for any clinical data, update the records in the clinical software and click **refresh**.

> IMPORTANT NOTE: Only data with a tick in the checkbox will be included in the referral.

Standard clinical information

Past prescriptions

No current medications on record

Recent investigations

☰	Date	Test Name	Show all / Show selected / Show none
☑	9 Dec 2012	E/LFT (MASTER)	
☐	2 Jan 2012	PAP SMEAR	
☑	4 Feb 2010	E/LFT (MASTER)	
☐	2 Jan 2010	PAP SMEAR	
☑	2 Feb 2008	Skin Allergy Tests	
☐	2 Jan 2008	PAP SMEAR	
☐	22 Aug 2007	E/LFT (MASTER)	
☐	2 Jan 2005	PAP SMEAR	
☐	12 Apr 2004	E/LFT (MASTER)	
☐	2 Jan 2004	PAP SMEAR	

Load more

Figure 15: Selecting investigations to send with the referral

Viewing clinical information

To view recent investigations and progress notes click **Show all** or **Show selected**. This will display the full item that is sent with the referral (**Figure 16**). To hide the full item click **Show none**.

Recent investigations

☰	Date	Test Name	Show all / Show selected / Show none
☐	9 Dec 2012	E/LFT (MASTER)	
☑	2 Jan 2012	PAP SMEAR	Cytopathology Report Site: Cervix - Conventional smear & ThinPrep Diagnostic Category: Negative Specific Findings: Benign squamous cells are present. There is no evidence of intraepithelial neoplasia or malignancy. An endocervical component is present. Recommendation: A repeat smear in two years is recommended unless there are clinical indications for earlier follow-up. Site: Cervix - Conventional Slide & ThinPrep

Figure 16: Viewing full investigation information

Attachments

In the Attachments section (**Figure 17**), attach any reports, images, or other documentation that may be relevant to the referral from the clinical software or computer.

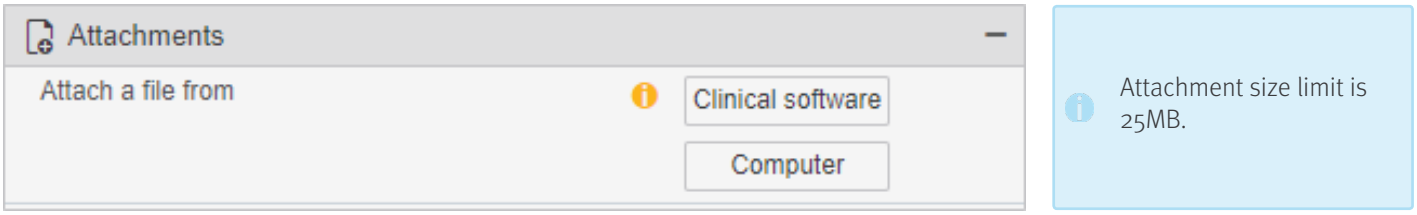


Figure 17: Attachments section

Allowed file types are:

- pdf
- docx
- png
- jpg
- jpeg
- gif
- txt
- rtf
- dcm
- dicom
- tif
- tiff

IMPORTANT NOTE: Please note that PDF is the preferred attachment type

Successfully attached documents are listed in green in the attachments section. To remove an attachment from the referral click the white **'x'** beside the file name, see **Figure 18**.

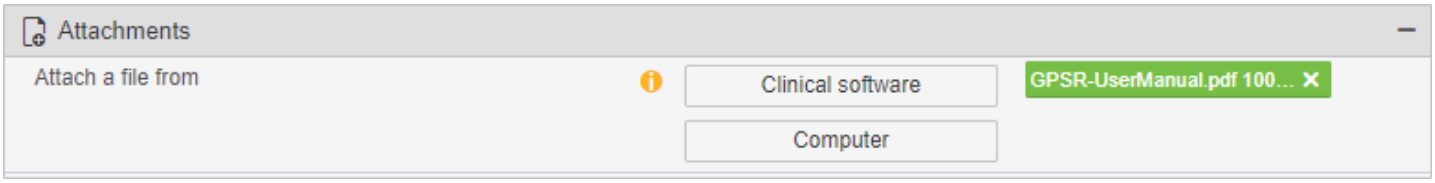


Figure 18: Successfully attached document

Attachment errors are displayed in red and not included in the referral. Hover over the attachment name to view the error details, see **Figure 19**.

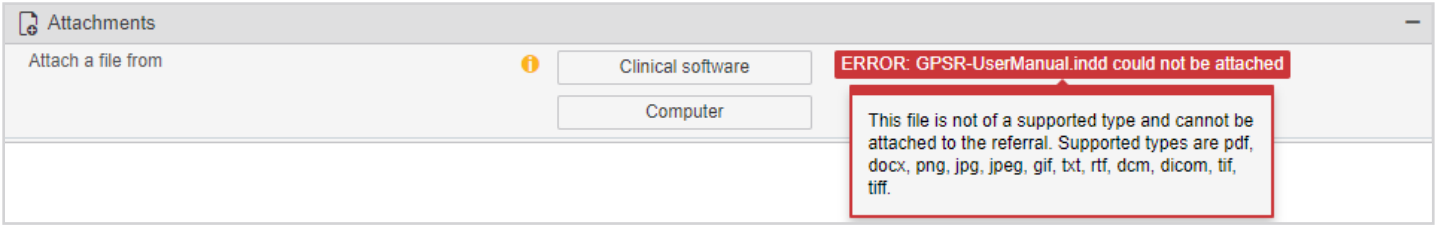


Figure 19: Attachment error

Integration with third party tools

Clinical software

Extraction

Smart Referrals extracts relevant patient information from the clinical software, this occurs when the application is opened. Extracted information is marked with a padlock icon 🔒 and cannot be edited.

Edit the data in the clinical software and click **Refresh** in Smart Referrals footer to extract the most recent data. All information entered on the referral will be retained when Smart Referrals is refreshed.

Writeback

When a referral is submitted, a PDF copy is generated and written back into the clinical software.

HealthPathways

Launching HealthPathways

To launch HealthPathways from Best Practice, click the button in the Smart Referrals client or Smart Referrals widget. See **Figures 20 and 21.**

Figure 20: Smart Referrals Client HealthPathways

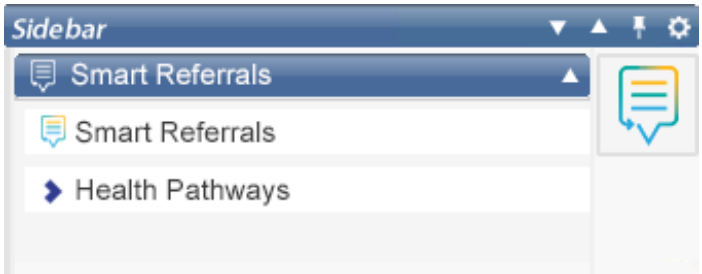


Figure 21: Medical Director sidebar widget HealthPathways

Opening Smart Referrals fom HealthPathways

In HealthPathways there will be a link in the pathway details, just look for the Smart Referrals logo (**Figure 22**). The link will either be in the assessment page as shown in **Figure 22** and also found on some condition specific HealthPathway pages.

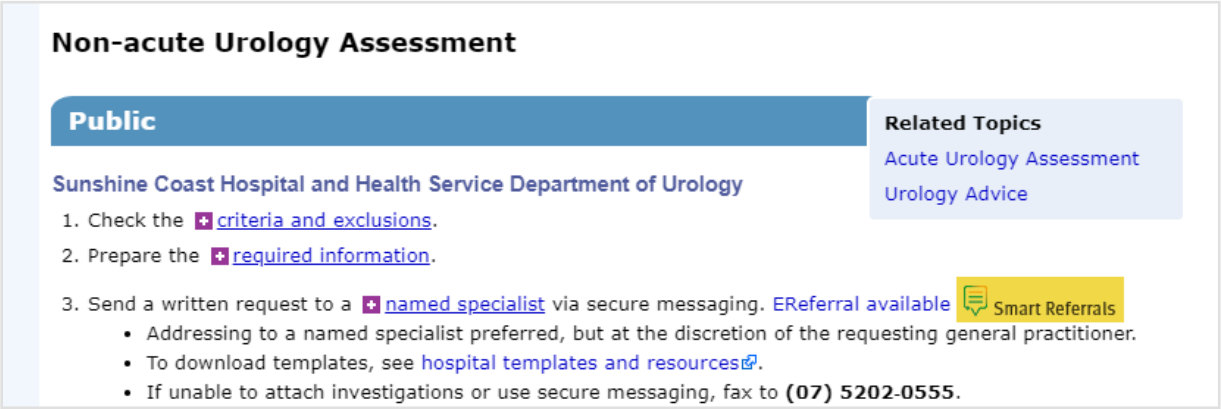


Figure 22: Smart Referrals link in HealthPathways

HealthPathways navigation

Click the link to open Smart Referrals, to return to the pathway that the referral was launched from click the **Go to HealthPathways** link next to the **Condition and Specialty** field in the Referral information section, see **Figure 23**.

Accessing HealthPathways from Smart Referrals

To access HealthPathways from Smart Referrals select the condition and click the **Go to HealthPathways** link.

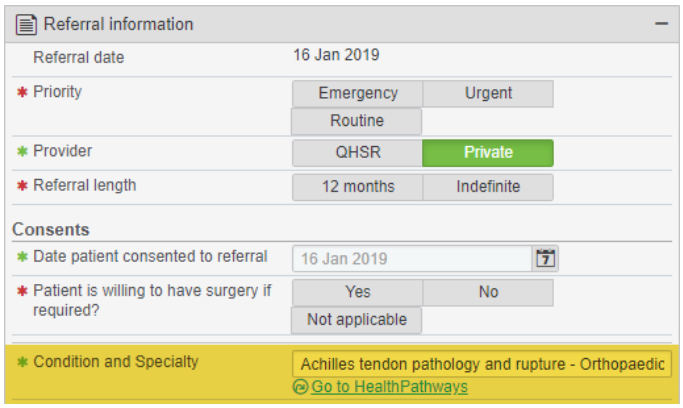


Figure 23: Condition and specialty HealthPathways link

Living referrals

Living referrals are made up of:

- Referrals in a draft state that have been previously started and parked, usually awaiting further information. These referrals have not been submitted.
- Referrals that have been previously submitted but are not yet in a finalised state, for example the appointment date has not yet been reached. Private referrals will display in this list if the referral was submitted in the last 12 months.

Opening living referrals list

Draft and submitted referrals display for the patient open in the clinical software. If there are no draft or submitted referrals for the patient, the list will not display and a new referral is automatically started.

Open Smart Referrals from your clinical software, any existing referrals for the patient (known as Living Referrals) will be displayed, see **Figure 24**.

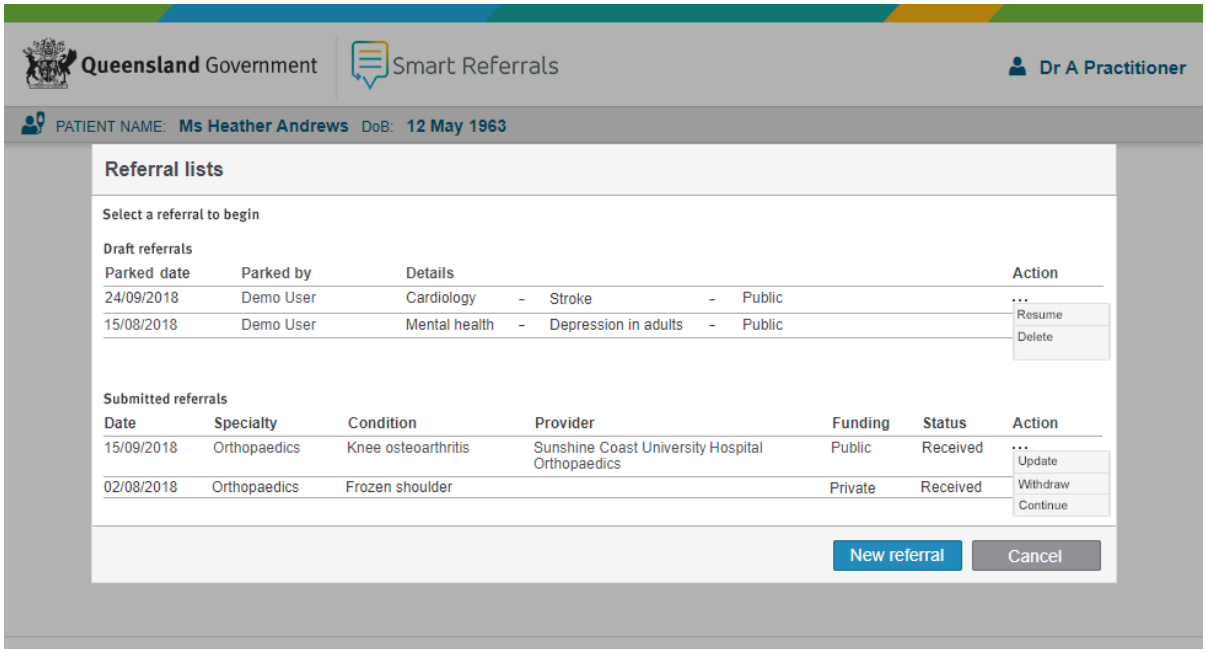


Figure 24: Living referrals list

Draft referrals

A draft referral is one that had been parked, usually because the referral is awaiting further information, or, investigations essential to the referral are missing. The referral remains in a draft state until resumed and submitted.

A draft referral can be resumed or deleted using the action buttons at the end of the row, see **Figure 25**. Click the **Action** button ··· to display a list of referral actions.

Resuming a draft referral

When a referral is **resumed,** any extracted data from the clinical software is refreshed and updated. All other fields can also be updated.

Deleting a draft referral

Clicking **delete** will show a confirmation message, if deleted the referral will no longer be shown in the living referrals list.

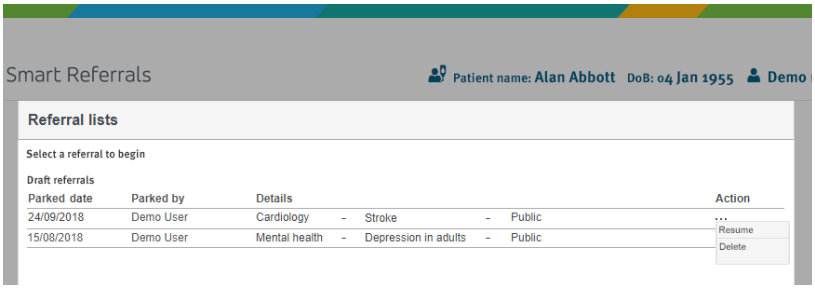


Figure 25: Draft referrals actions

Submitted referrals

Submitted referrals is a list of:

- Previously sent private referrals for the patient over the last 12 months
- QHSR referrals that remain in the list until the referral has been completed, cancelled or declined

Submitted referrals can be updated, withdrawn, or continued using the actions at the end of the row. Click the **Action** button ··· to display a list of referral actions.

Update and continue

Clicking **update** or **continue** opens a version of the original referral with the addition of **referral history** and **referral action** sections.

The referral is updated with the latest extracted information from the clinical software. Both update and continue require the reason for updating or continuing the referral, this reason is different for each option (update is shown in **Figure 26**).

Only the following information can be changed:

- Select or deselect any standard clinical information for inclusion in the referral
- Attach one or more documents

Once submitted the new referral version will be written back to the clinical software.

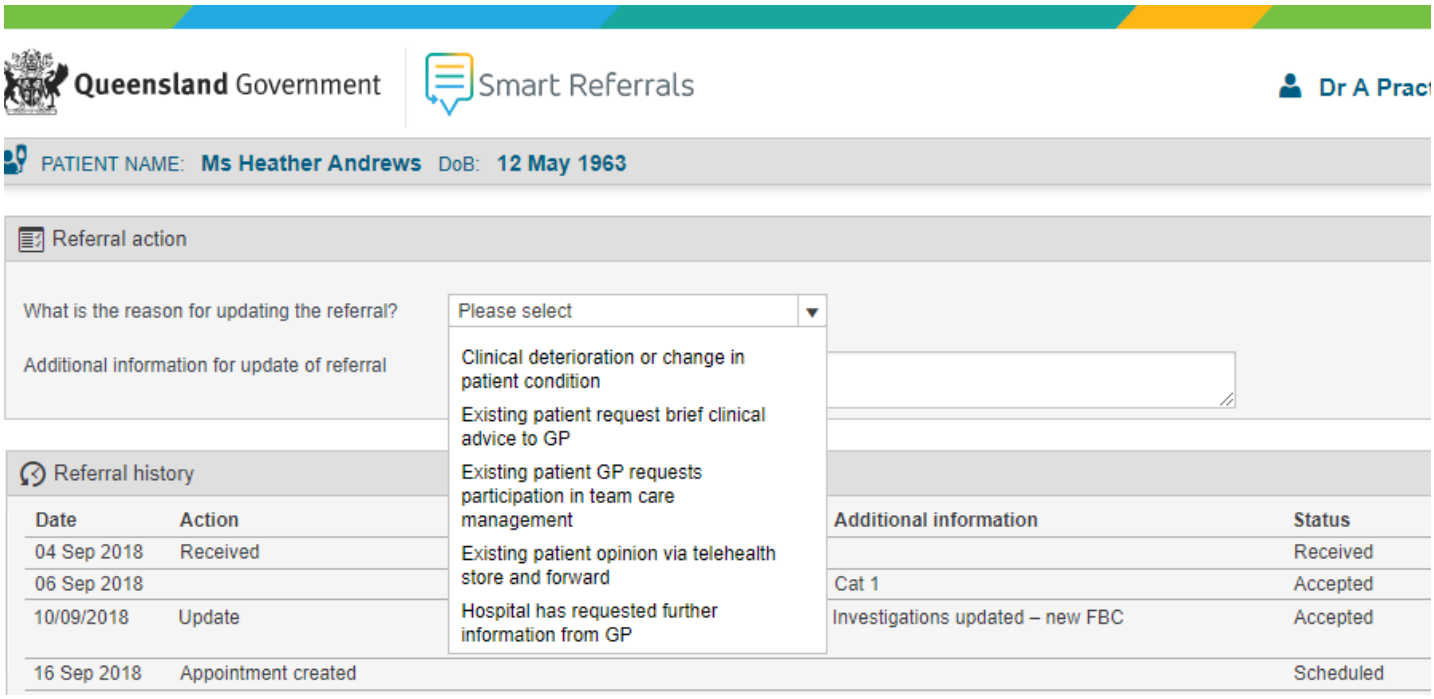


Figure 26: Updating a submitted referral

Withdraw

Clicking **withdraw** opens a window that requires the reason for withdrawal (see **Figure 27**). If withdrawn the referral is unable to be accessed by Smart Referrals.

The referral will be written back into the clinical software and an entry made into the referral history detailing the reason for withdrawal.

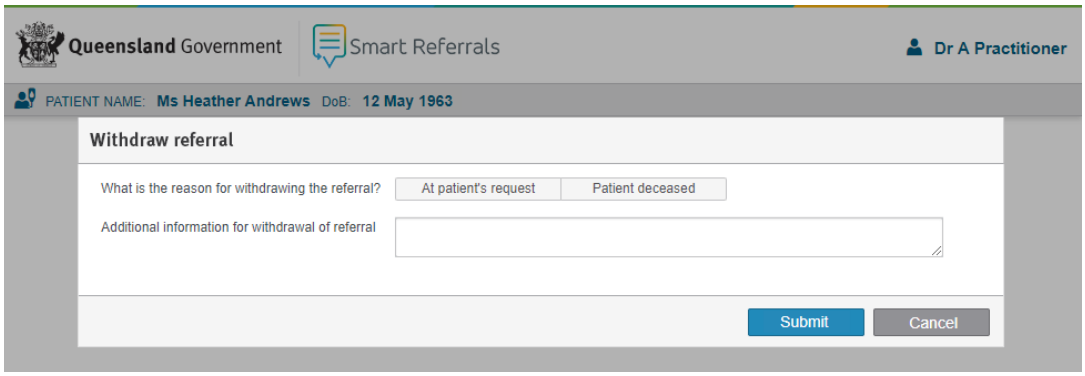


Figure 27: Withdrawing a submitted referral

Preview, submit, and writeback

Click **Submit** to preview the details of the referral before sending. To edit any details click the **Edit** or click **Submit** to send the referral.

A PDF version of the referral is written back to the clinical software including the referral status and update details.

> Before you submit, please read the textbox above the submit button that outlines: "By pressing the SUBMIT button I verify that this is an accurate record of the referral created and acknowledge this action is in lieu of my signature"

View referral PDF in clinical software

Best Practice

The referral PDF is can be found in **Correspondence Out** (**Figure 28**). To view the referral:

1. Ensure the patient is open.
2. Click **Correspondence Out**.
3. Locate the referral in the list of correspondence, shown in **Figure 28**.

Double click the referral to view the details.

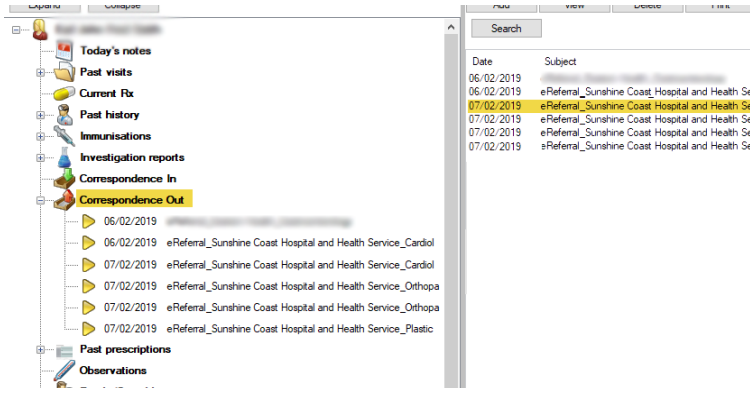


Figure 28: Smart Referral in Best Practice Correspondence Out

Medical Director

The referral PDF is can be found in **Letters** (**Figure 29**). To view the referral:

1. Ensure the patient is open.
2. Click **Letters**.
3. Locate the referral in the list of letters.

Click the referral to view a preview below the list, double click the referral to open it in a new window.

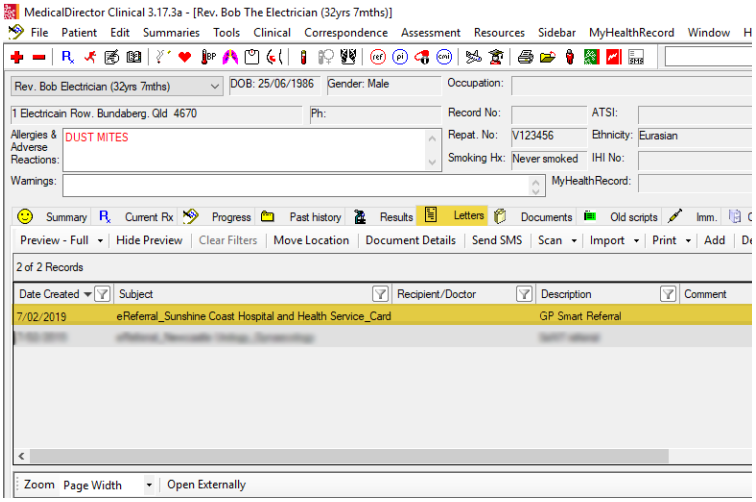


Figure 29: Smart Referral in Medical Director Letters