



 CareConnect  
eReferrals

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Quick Reference Guide - MedTech

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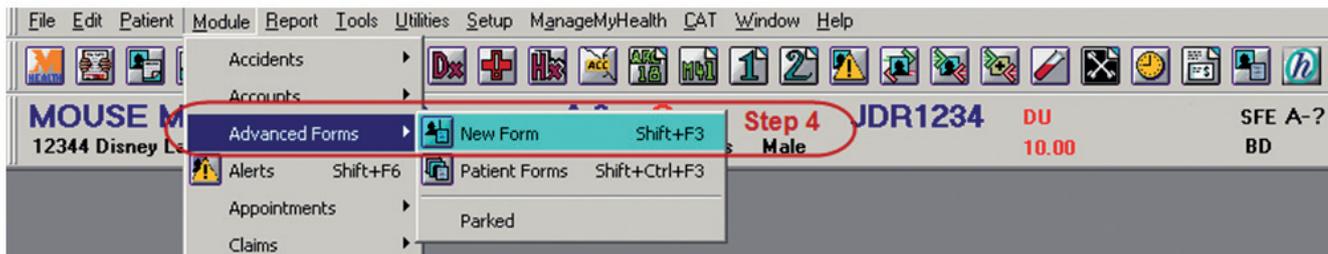
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# Launching an eReferral from MedTech

1. Search for your patient by selecting **“Patient/Search”**, alternatively you can press F2 (shortcut).
2. Type in the first letters of the patient surname into the name field and select **“Search”**.
3. Select **“OK”** when you have located the correct patient.

You will now be presented with the patient’s Electronic Medical Record (EMR).





To access the eReferral template select “**Module/Advanced Forms/New Form**”.

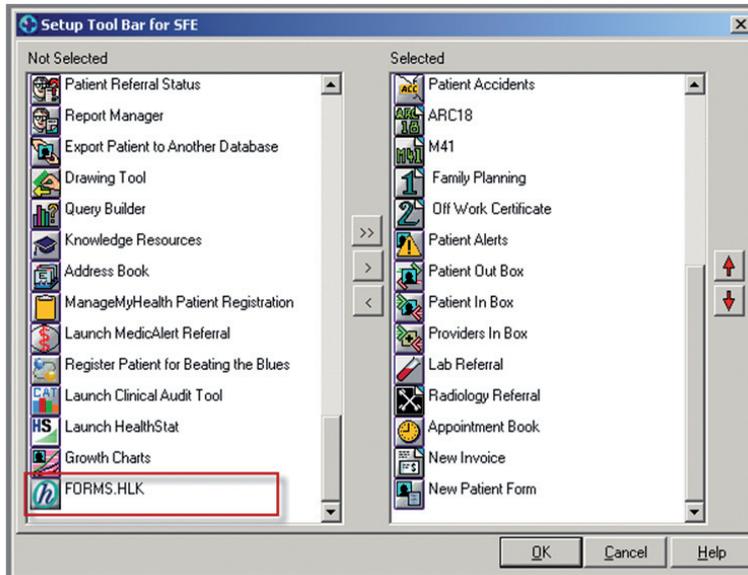


*Alternatively* you could set up the **Forms** icon on your system as a shortcut to accessing the eReferral form Pressing Shift+F3 is another shortcut to access the forms as well. (See next page).

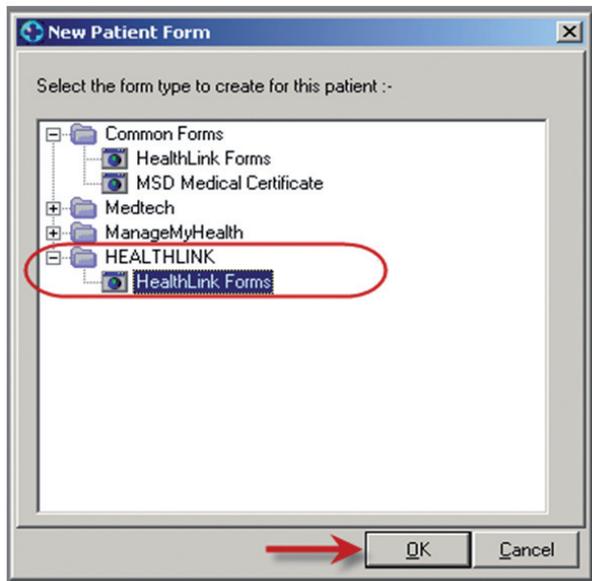
## Setting up the forms icon

Select Windows ► Toolbar ► Setup...

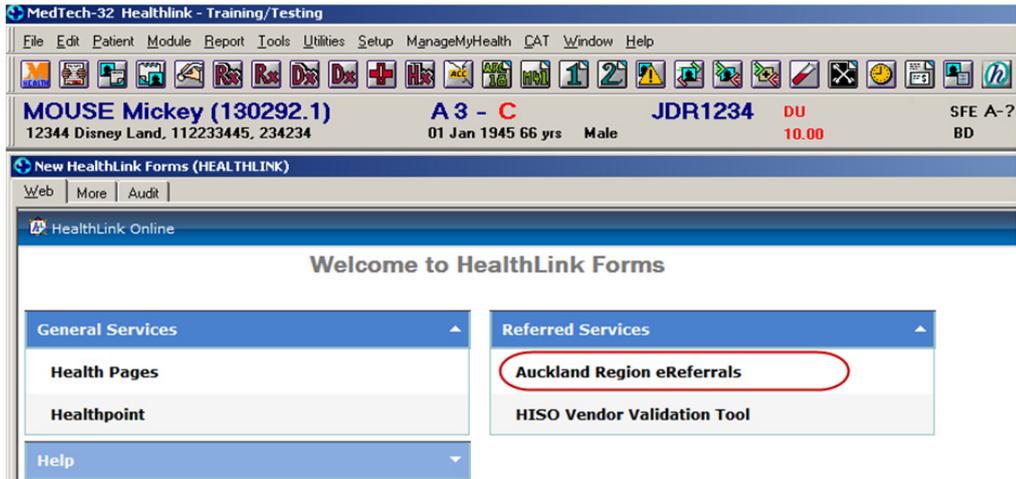
Within the Setup Toolbar Window, click on the **Forms.HLK** in **Not Selected**, then click on the “>” button to add it to the selected toolbar items. Click on **OK** to save this change.



Upon clicking “New Form” a “New Patient Form” pop-up box will appear. Select “HEALTHLINK/HealthLink Forms” then click “OK”.



Select CareConnect eReferrals.



You will be presented with the CareConnect eReferrals template.

# eReferrals - Getting Started

The screenshot displays the 'Auckland Region eReferrals' interface. On the left, a tree view lists medical specialties: Audiology, Breast, Cardiology, Dermatology, Diabetes, Endocrinology, Fertility, Gastroenterology, and General Medicine. The 'Referral service' dropdown is set to 'Cardiology'. The 'Referred for' dropdown is open, listing various referral reasons. The 'Referral type' dropdown is open, showing 'First Specialist Assessment' and 'Follow-up Referral'. The 'Urgent' checkbox is checked, and the 'Details' dropdown is open, showing 'Urgent case'. A 'Next' button is located in the top right corner.

1. **Referral Service** - Library of referral forms.
2. **Referred For** – Reason for referral.
3. **Referral Type** First Specialist Appointment” or “Follow-up Referral”.
4. When the **“urgent”** tick box is selected you can add notes to support the referral urgency in the “Details” text box.

# Section Tabs

HealthLink Online

## Breast Referral for Outpatient Appointment

**Clinical Information**  
Lump

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

**Medications / Warnings**  
No medications specified, No medical warnings specified

**Medical History**  
No medical history specified

**Patient Disabilities**  
No disabilities specified  
No mobility issues specified

**Patient Information**  
Mouse Mickey, 30yrs  
ABC1235

**Administration Details**  
Auckland DHB  
Outpatient Appointment  
Not Specified

**Referrer Details**  
Referred by Marcus Welby  
The Practice  
NZMC 456789NC

**Problem Impact** Impact rating\* [Min] [Max]

Impact details

**Previously Referred** Has patient been previously referred for this condition?

ACC ACC claim [Not]

**BREAST**

Reason for referral\* Lump

Lump Nature Discrete Side\*

Position Nipple and Areola Skin

Lump details

Lump is located on the right areola inflamed.

**History**

Lymphadenopathy Yes

Breast disease history  Yes  No  Unknown

**SECTIONS TAB**

**The Sections Tab consists of:**

- Clinical Information
- Attachments/Reports
- Medications/Warnings
- Medical History
- Patient Disabilities
- Patient Information
- Administration Details
- Referrer Details

These are important sections as they provide the information required by the service for triage. To enter referral details - simply click on each 'section tab' to start entering information.

HealthLink Online

## Cardiology Referral for Outpatient Appointment

Submit Preview Park Help

**Clinical Information** Atrial Fibrillation / Flutter

Please fix the following errors:

- Please select Facility; Unable to verify patient's regular DHB
- Administrative Facility is a required field
- Cardiology Referral Reason is a required field
- Patient ethnicities code 1 is a required field

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

**Medications / Warnings**  
No medications specified, No medical warnings specified

**Medical History**  
No medical history specified

**Patient Disabilities**  
No disabilities specified  
No mobility issues specified

**Patient Information**  
MICKEY MOUSE, 66yrs  
JDR1234

**Administration Details**  
Auckland DHB  
Outpatient Appointment  
Non Eligible

**Referrer Details**  
Referred by Sam Entwistle  
Milestone Family Practice  
NZMC A99964-3

**Problem Impact** Impact rating\* Nil

**Previously Referred** Has patient been previously referred for this condition?

**ACC** ACC claim Not Specified

**CARDIOLOGY**

Reason for referral\* Atrial Fibrillation / Flutter

Atrial Fibrillation / Flutter

Options

(1) Poorly controlled without symptoms

(2) Poorly controlled with symptoms (e.g. Shortness of breath, presyncope)

(3) Controlled but recent onset (>6/12)

(4) Chronic state

Pre-op non-cardiac surgery Please Select

Primary / Secondary prevention

Investigations / Results to be attached

The clinical information section has 2 mandatory components;

1. **General clinical information:** These fields are displayed on every form.

# Clinical Information

HealthLink Online  
CareConnect eReferrals

Endocrinology Referral for Outpatient Appointment

Submit Preview Park Help

**Clinical Information**  
Bone disorders

- At least one of Endocrinology Reason is required
- Patient ethnicity code 1 is a required field

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

**Medications / Warnings**  
No medications specified, No medical warnings specified

**Medical History**  
No medical history specified

**Patient Disabilities**  
No disabilities specified  
No mobility issues specified

**Patient Information**  
MCKS / MOUSE, gmys  
JDR1234

**Administration Details**  
Please Select  
Outpatient Appointment  
Non Eligible

**Referrer Details**  
Referred by Sam Entwistle  
Milestone Family Practice  
N2M2C A88984-3

Problem Impact Impact rating\* Moderate

Impact details

Previously Referred Has patient been previously referred for this condition?

ACC claim Yes

Select the ACC record associated with the referral\*

ACC	ACC45	Date	Is Work Related	Location	Details
C	T667711	07/03/1999	false		fell on ear

ENDOCRINOLOGY

Reason for referral\*

- Hyperthyroidism
- Hypothyroidism
- Thyroid Nodule / Goitre
- Pituitary abnormality
- Polycystic Ovary Syndrome
- Bone disorders
- Adrenal disorders
- Other

Referral details

2. **Service clinical information:** These fields change depending on the service selected. Forms will have one of two sets of service clinical information fields.

**Service Specific clinical Information:** A number of fields specific to the Service selection. Length and complexity are also unique to the Service. All of these forms types however will include the following fields:

- Reason for Referral
- Referral Details

## ENDOCRINOLOGY

Reason for referral\*

- |                          |                           |                          |                       |
|--------------------------|---------------------------|--------------------------|-----------------------|
| <input type="checkbox"/> | Hyperthyroidism           | <input type="checkbox"/> | Hypothyroidism        |
| <input type="checkbox"/> | Thyroid Nodule / Goitre   | <input type="checkbox"/> | Pituitary abnormality |
| <input type="checkbox"/> | Polycystic Ovary Syndrome | <input type="checkbox"/> | Bone disorders        |
| <input type="checkbox"/> | Adrenal disorders         | <input type="checkbox"/> | Other                 |

Referral details  

### Mandatory Form Fields

Mandatory fields are marked with a red asterisk (\*).

If information is missing from mandatory fields, the tab and the field will be highlighted.

## Clinical Attachments List Display

A number of specialty referrals require specific reports to be attached as part of the referral. Where required, this list is called a “Clinical Attachments List” and is displayed on both the bottom of the specialty fields in the clinical section and on the attachments tab.

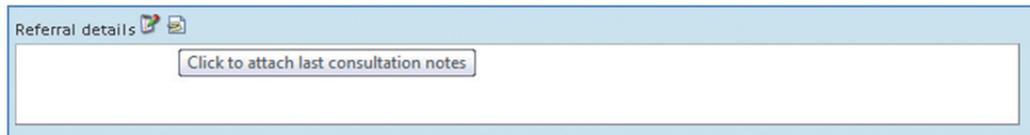
Documents stored within the PMS system can also be attached to the referral form.

## Attaching Last Consultation Notes

Both the eReferral web form and other parts of the PMS can be opened at the same time, this allows you to locate items like consultation notes that you wish to include within the eReferral. Use the standard windows copy and paste keys to complete this task. (CTRL C/CTRL V).

***Alternatively,*** there is a shortcut icon in the form that can drop in the last consultation notes within the Clinical section.

Forms that have questions specific to the Service are located next to the ‘Referral Details’ rich text box, and within forms with generic clinical sections this is located next to the ‘Reason / Provisional Diagnosis’ field.



# Medications / Warnings

**Clinical Information**   
Information Required

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

**Medications / Warnings**   
3 Current medications specified, 3 medical warnings specified

**Medical History**  
Medical history specified

**Patient Disabilities**  
No disabilities specified  
No mobility issues specified

**Patient Information**  
Micky Mouse, 12yrs  
JDR1234

Form is auto-parked. Please note that attachments need to be re-attached when resuming the parked form.

Please fix the following errors:

- At least one of Endocrinology Reason is required

Current Medications 

Date	Details	Dose	Units	Instructions	
11/05/2010	Asciimmg anti biotics	100	mil	3 times a day, take with food	
10/03/2009	Asciimmg anti biotics	100	mil	3 times a day, take with food	
19/02/2009	5ml/100mg Paracetamol 200mg liquid	200.3	mg	take 12ml every four hours, max 4 times 24 hours	

Medication comments 



In the medications section of the Form the 'Current Medications' table is pre-populated by the PMS. All current medications that have been marked as 'Long term' or 'Regular' Medications within the PMS and have a last prescribed date within the last 6 months, should be included in this table when the form is launched.

Additional medications can also be added to the table during the referral process through using the '+' sign on the table to add another row which can be edited with Medication details.

# Submitting an eReferral

**AUCKLAND**  
HOSPITAL HEALTH BOARD

## Cardiology Referral for Response to Information Request

**Submit**

**Clinical Information**  
Hypertension

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

**Medications / Warnings**  
3 Current medications specified, 3 medical warnings specified

**Medical History**  
Medical history specified

**Patient Disabilities**

Please fix the following errors:

- Cardiology Referral Reason is a required field

Problem Impact      Impact rating\*      Nil

Previously Referred      Has patient been previously referred for this condition?     

ACC      ACC claim      Not Specified

CARDIOLOGY

Reason for referral\*      Hypertension

On completion, the form can be submitted by selecting the “SUBMIT” button on the top right corner of the form.

# Parking a Form and Retrieving a Parked Form

HealthLink Online

CareConnect eReferrals

Endocrinology Referral for Outpatient Appointment

Submit Preview **Park** Help

**Clinical Information** Bone disorders

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

**Medications / Warnings** No medications specified, No medical warnings specified

**Medical History** No medical history specified

Please fix the following errors:

- Please select Facility; Unable to verify patient's regular DHB
- Administrative Facility is a required field
- At least one of Endocrinology Reason is required
- Patient ethnicities code 1 is a required field

Problem Impact Impact rating\* Moderate

An eReferral form can be parked at any time which saves the referral for later submission. This “parked” form will be saved in the relevant area within your PMS for re-editing.

## Retrieving a parked form

Parked forms can be retrieved by selecting **Module/Advanced Forms/Parked** then selecting the patient the referral was made for.

Submission of the form can be made once editing has been completed. See *“Submit form”*

Within the form there will be a number of Help options to assist the Referrer in completing the form accurately.

<b>Hover Help</b>	n/a	Appears when the label is hovered over for 2 seconds.
<b>Information Help</b>		An information icon on the right side of the field label and presents a pop light box.
<b>Field Help</b>		A question mark icon on the right side of the field label and opens a webpage.

The editable view of the referral form will have the following sources of user help:

- Menu Help
- Subject Help

### **For issues with the operation of eReferrals, please contact:**

- healthLink Helpdesk on **0800 288 887** or email [helpdesk@healthlink.net](mailto:helpdesk@healthlink.net).

For questions regarding the clinical content of eReferral forms, please contact:

- CareConnect eReferrals on **0508 227 326** or email [eReferrals@healthalliance.co.nz](mailto:eReferrals@healthalliance.co.nz).

For training materials or support, please visit the eReferrals website ([www.eReferrals.co.nz](http://www.eReferrals.co.nz)) or contact your PHO trainer. If you would like to chat to someone online you can also click on the chat section of the eReferrals website.

The following services will be included in the first phase of eReferrals. All referrals will be received by the hospitals Central Referral Office and distributed accordingly.

Audiology

Breast

Cardiology

Dermatology

Diabetes

Endocrinology

Fertility

Gastroenterology

General Medicine

General Surgery

Haematology

Immunology

Infectious Diseases

Neurology

Ophthalmology

Oral Health

ORL

Orthopaedics

Paediatric

Pain Clinic

Plastic (and Hand)

Renal

Respiratory

Rheumatology

Skin Cancer

Stroke / TIA

Urology

Vascular

Women's Health



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[www.ereferrals.co.nz](http://www.ereferrals.co.nz)

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