

# Using MEDrefer Manager & Urgent Care Handover eForm

Sole GP

(Medical Director, Zendesk & Genie Users)

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If you have any trouble following or understanding the following instructions, please contact our Support Team on **1800 556 022 (between 9:00am – 5:00pm AEST (GMT Standard +10hours))**. If you require assistance outside these hours you can either leave a message or email [support@medrefer.com.au](mailto:support@medrefer.com.au).

## How to Use This Guide

This guide is intended for admin staff and GPs participating in the WA Urgent Care GP pilot program. Depending on the structure of your practice, various roles may perform the tasks described within. This version of the guide focuses on practices using [Medical Director, Zedmed or Genie](#), with a single Urgent Care GP and the support of an Admin team; if this does not describe your practice, please contact [urgentcare@wapha.org.au](mailto:urgentcare@wapha.org.au) who can supply you with another version more suited to your practice.

## For GP or Admin Staff to Complete

### Create Your Own Profile

1. Go to the MEDrefer website at [www.medrefer.com.au](http://www.medrefer.com.au)
2. Click on Register.



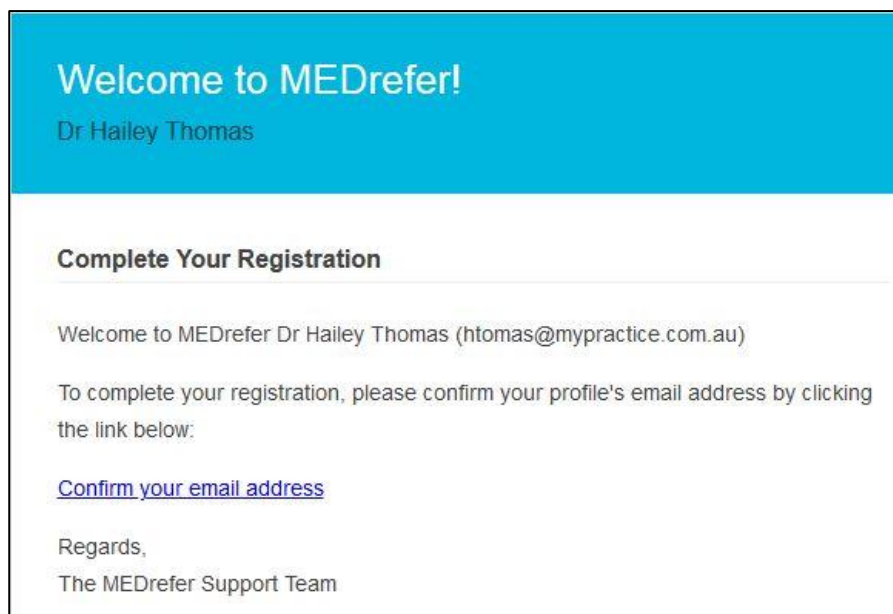
3. Select your role within the practice as a GP.

A screenshot of the 'About You' registration form. The form has a title 'About You' in blue. Below it, a grey box contains the question 'What is your role within the practice? \*' followed by explanatory text: 'MEDrefer allows GPs to issue referrals. Specialists and Allied Health Professionals can issue as well as accept referrals. We also allow Practice Managers to accept referrals on behalf of a Specialist or Allied Health Professional.' Below this text are four radio button options: 'GP' (selected), 'Specialist', 'Allied Health Professional', and 'Practice Manager/Receptionist'. Below the radio buttons is a 'Name \*' section with a dropdown menu showing 'Dr' and three input fields for 'Title', 'First', and 'Last'.

4. Enter your name, email address and a password (minimum 6-characters). Click the Captcha box and Sign up.

A screenshot of the Captcha and Sign up section. It features a reCAPTCHA box with the text 'I'm not a robot' and a checkbox. To the right of the checkbox is the reCAPTCHA logo and the text 'reCAPTCHA Privacy - Terms'. Below the Captcha box is a blue 'Sign up' button.

5. A confirmation email will be sent to the entered email address with a link that will take you to the sign in page.



6. Enter your email address and password, then click Sign in.

The image shows a screenshot of the MEDrefer login page. The top has a blue header with the word 'Login' in white. Below the header, there are two input fields: 'Email' and 'Password'. The 'Email' field contains the text 'htomas@yahoo.com'. The 'Password' field contains a series of dots. To the right of these fields, there is a section titled 'Need Help?' with three links: 'Sign up', 'Forgot your password?', and 'Didn't receive confirmation instructions?'. Below the input fields, there is a checkbox labeled 'Remember me'. At the bottom left, there is a blue button with the text 'Sign in' in white.

## Complete Your Practice Profile

Once you login you will enter the practice profile page.

**1 - Practice Details**2 - Practitioner Details3 - Select Plans

### Practice Details

Clinic/Hospital/Practice Name *	Manager's Name	
<input type="text" value="Dr Hailey Tomas"/>	<input type="text" value="Practice or Office Manager's Name"/>	
HPI-O	Clinical Software	
<input type="text" value="NEHTA Organisational Id"/>	<input type="text" value="e.g. Best Practice, Genie etc."/>	
Address *		
<input type="text" value="Shop 3, 18 Milligan Road"/>		
<input type="text" value="Address Line 2"/>		
<input type="text" value="Mistlethorpe"/>	<input type="text" value="WA"/>	<input type="text" value="6089"/>
Practice Phone *	Fax	
<input type="text" value="08 9639 3176"/>	<input type="text" value="08 9639 3179"/>	
Practice Email	Website	
<input type="text" value="jess@mypractice.com.au"/>	<input type="text" value="Website"/>	

Create Practice

Enter all the requested details including an email address and fax number to create your practice. Click Create Practice.

## Complete Your Practitioner Profile

1. Enter your practitioner details, making sure to complete all sections marked with a red asterisk (\*).

You may also, if you wish, attached an electronic signature to your profile. This will automatically attach to the bottom of any referrals you create via MEDrefer Manager.

**N.B.** – For the signature to load to the account, it will need to be in a JPEG or PNG format.

1 - Practice Details

2 - Practitioner Details

3 - Select Plans

### Complete Your Practitioner Details

Name \*

Dr

Hailey

Thomas

Gender

Female

Select Your Practitioner Type \*

☒ GP

☐ Specialist

☐ Allied Health

Practitioner Invite Email

Qualifications

Medical Registration \*

AHPRA

MED0000852963

Provider Number \*

356241L

Scanned Signature Image

Browse...

No file selected.

Create Practitioner

- The screen will change to your personalised Dashboard. Here you will be able to create referrals and see all the referrals you have created in the past and their status.

The screenshot shows the MEDrefer+ dashboard for Dr Hailey Tomas. At the top, there is a navigation bar with the MEDrefer+ logo, a search icon, and links to 'My Referrals' and 'Favourites'. The user's name 'Hailey Tomas' and 'Dr Hailey Tomas' are displayed next to a home icon. Below the navigation bar, there is a 'Search For' section with two input fields: 'e.g. Psychology, Dr Name etc.' and 'e.g. Brisbane or 4170', followed by a 'SEARCH' button. The main content area is divided into two sections. On the left, under 'Dr Hailey Tomas', there is a 'REFERRALS CREATED' section with a table showing counts for 'Issued', 'Reversed', 'Accepted', and 'Replied', all of which are currently at 0. On the right, there is a 'Recent Activity' section with the text 'Nothing to see here yet.' and a 'View All' link. Below this, a message states: 'This is where we'll list your recent referral activity and transactions.'

- To finish verifying your account, click on your name at the top of the screen next to the home icon.

The screenshot shows a user profile dropdown menu. It features a blue background with a white user icon on the left. The text 'Jessica Daniels' is displayed in white, followed by 'Skye Meadows General P...' in a smaller font. A white home icon is located on the right side of the menu.

- This will take you to your Details pages – Practitioner Details, Practice Details, Preferences.

The screenshot shows the 'About Ms Jessica Daniels' profile page. On the left, there is a sidebar with navigation links: 'Practitioner Details', 'About', 'Specialities', 'Practice Details', 'Availability', 'Preferences', and 'Email'. The main content area is titled 'About Ms Jessica Daniels' and contains the following fields: 'Name' (with a dropdown set to 'Ms' and text boxes for 'Jessica' and 'Daniels'), 'Gender' (a dropdown set to 'Female'), 'Qualifications' (a text box with a placeholder 'Your qualifications and memberships (separate with commas) e.g. MBBS, FRACS'), and 'Medical Registration' (with a dropdown set to 'AHPRA' and a text box containing 'PSY0000159756').

Click through each of the sections to check all details entered are correct and add any details that are missing or incomplete, such as gender, qualifications, timezone, telehealth options, languages and signature which will be automatically added to the bottom of any referrals created.

**N.B.** – For the signature to load to the account, it will need to be in a JPEG or PNG format.

5. Once details in each section are complete, click the blue Update button before moving to the next section.
6. When all sections have been completed, click on the MEDrefer Logo to return to the Dashboard page or the home icon to return to the Launchpad page.





## MEDrefer Manager Installation (to be completed on GPs desktop)

**N.B.** – If your practice runs on a **Remote Access Connection**, please see document [Running MEDrefer Manager over Remote Access Connection](#) before downloading MEDrefer Manager.

1. If not already logged into a GPs MEDrefer Profile, go to the MEDrefer website ([www.medrefer.com.au](http://www.medrefer.com.au)) and login to it.
2. From the dashboard screen, click on the Home icon at the top of the screen.



3. Click on the green 'Download MEDrefer Manager for Windows' link to take you to the MEDrefer Manager page.



4. Click on the green 'Download MEDrefer Manager' link.



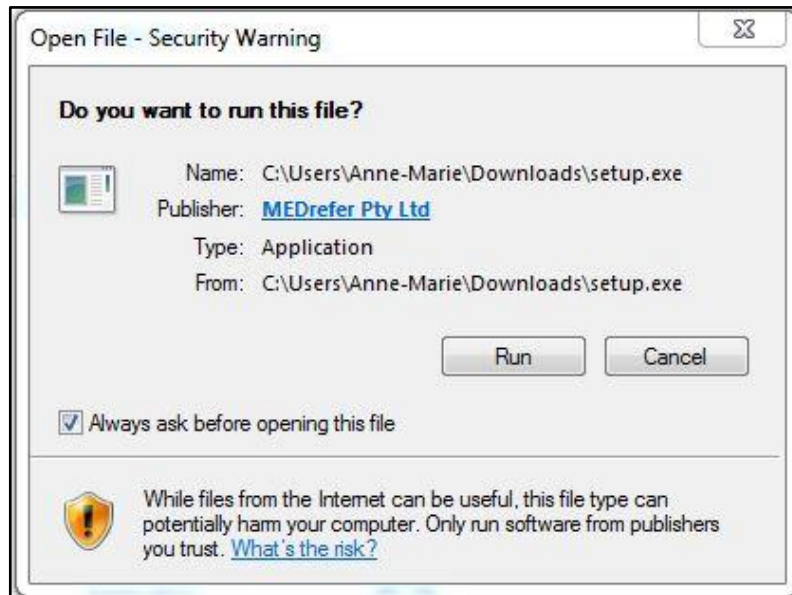
This may take a few minutes to complete.

5. Once the download is complete click the executable at the bottom left hand corner of the screen to launch the program.

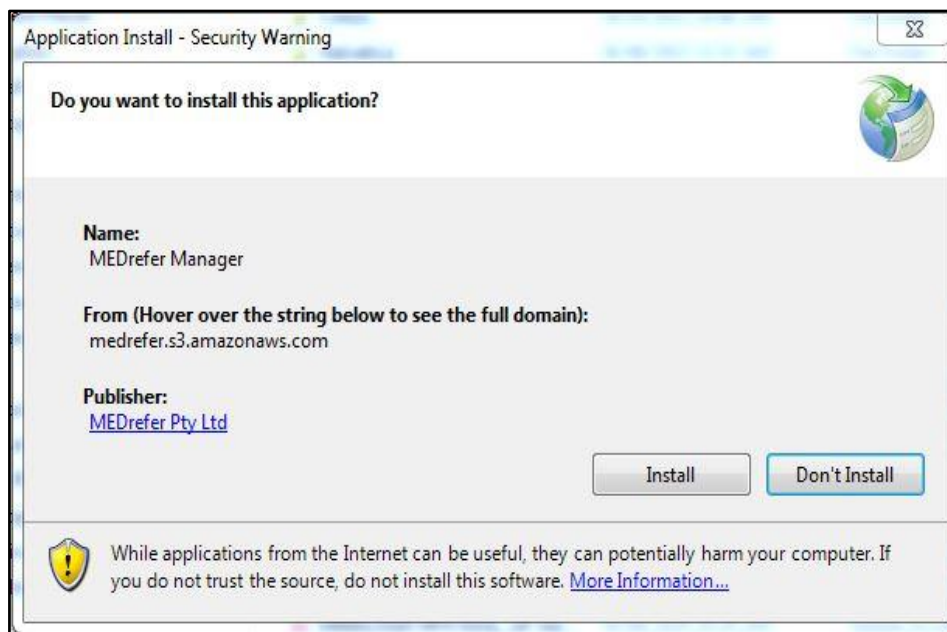




6. When the Open File pop-up appears, click on Run.

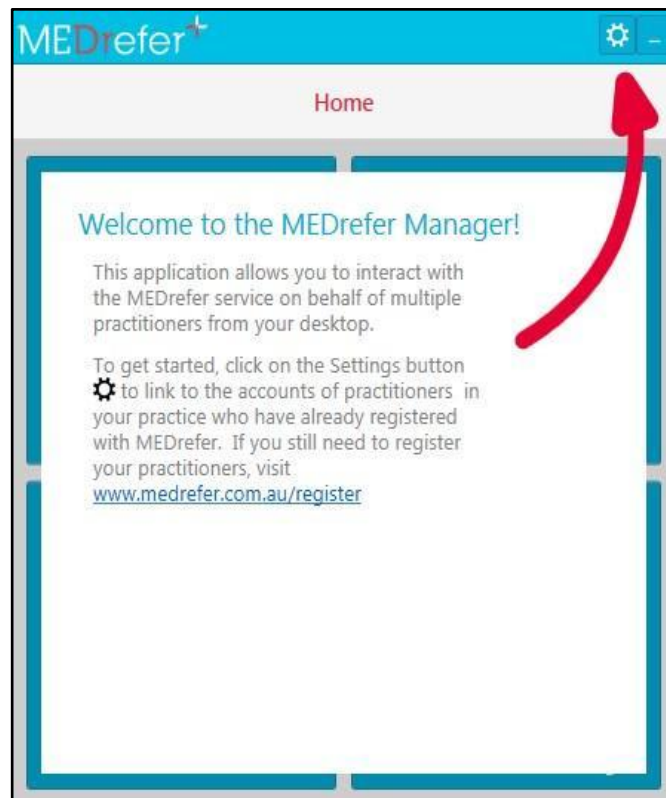


7. When the Application Install pop-up appears, click on Install.



This may take a few minutes to complete.

8. MEDrefer Manager will appear in the bottom right-hand corner of the screen, with instructions and a red arrow to show where to click next – on the Settings icon.

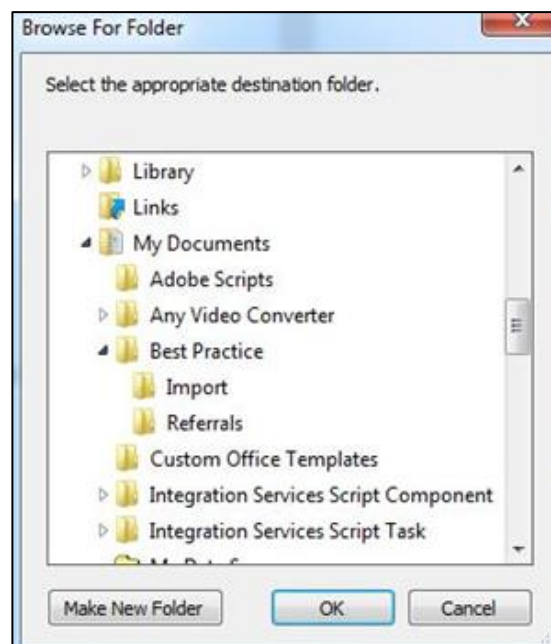
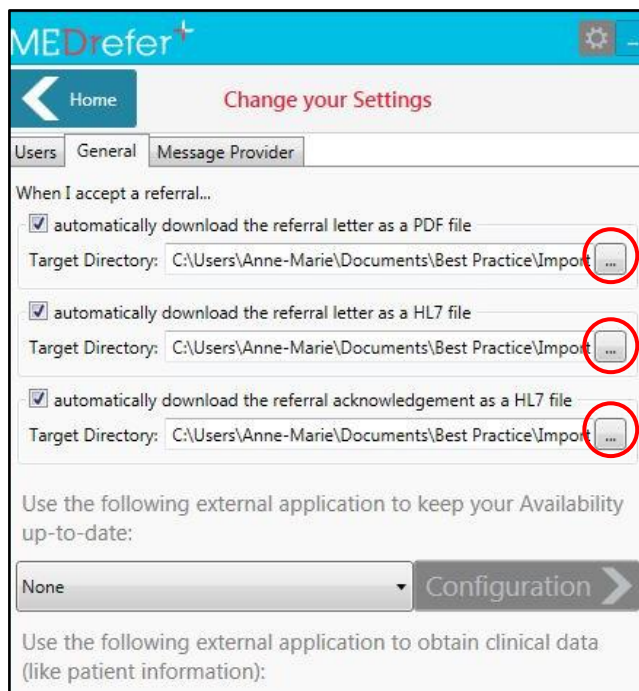


9. In the Users tab, add the unique email address and password of a practitioner who has already been registered, then click Link User.

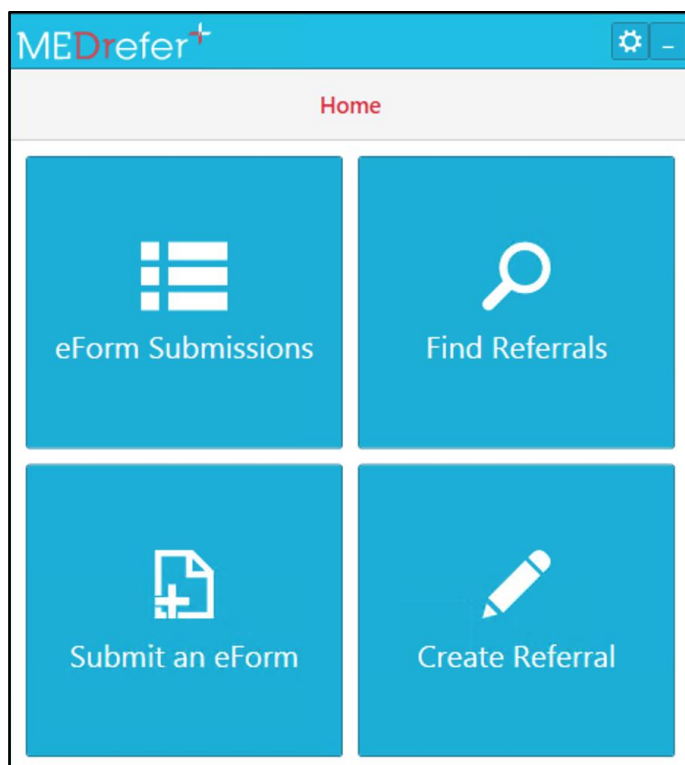
The screenshot shows the MEDrefer Manager Users tab. The 'General' sub-tab is selected. The 'Email Address' field contains 'keith+gp1@medrefer.com.au' and the 'Password' field is masked with dots. A 'Link User' button with a plus sign is visible. The 'Users' tab is also visible at the top.

The screenshot shows the MEDrefer Manager Users tab. The 'General' sub-tab is selected. A message states: 'Only a single user can be added. If you need a different user, click the cross next to the current user below to remove it. If you need more than one user, please contact support (Phone 1800 556 022, Email support@medrefer.com.au)'. Below the message, a user entry 'Dr K Gp1' is shown with a cross icon to its right.

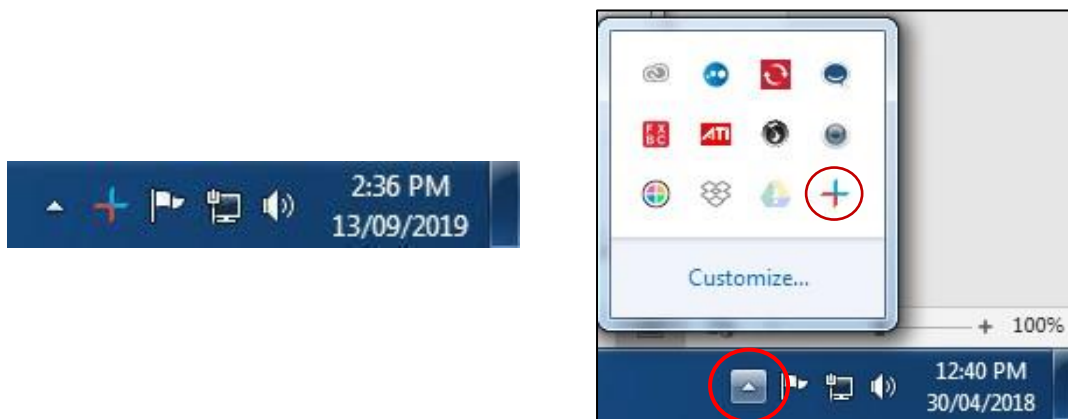
10. In the General tab, determine whether you want the eForms/referrals to be downloaded as a PDF file or a HL7 file (or both if desirable) and tick the appropriate box. Click on the ellipses (3 dots) button, to select where to download the referrals to, then click Ok.



Your setup has now been completed. Click on **Home** to go to the main screen.



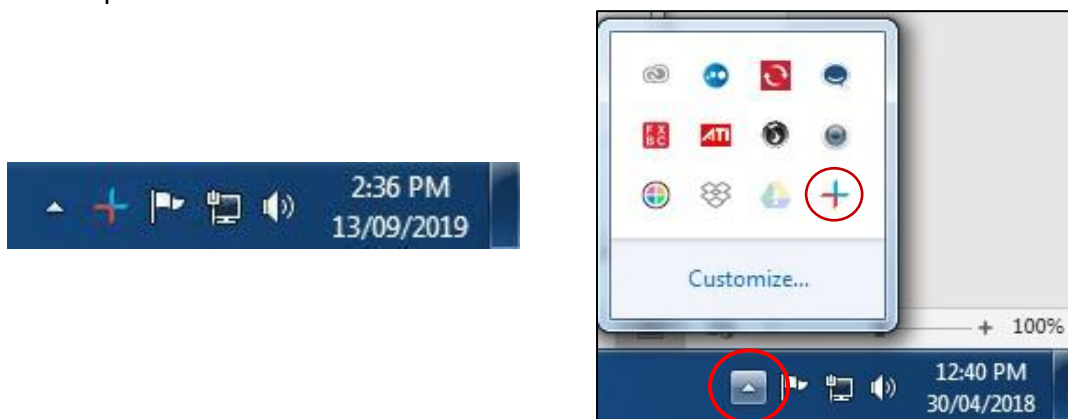
MEDrefer Manager will reside within the taskbar (hidden or visible) and can be maximised and/or minimised as required.



## Urgent Care GP Handover eForm

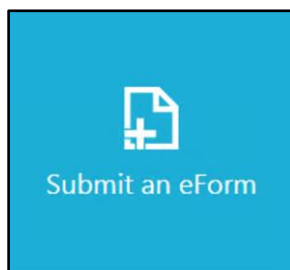
### Submit an Urgent Care GP Handover eForm

1. Have patient file open in your EMR/PMS. The form will auto-populate from the active patient record for Best Practice, Medical Director, with Zedmed and Genie.
2. Open MEDrefer Manager app from your system tray in the bottom right of Windows Desktop.



**N.B.** - If you have not yet installed the application, refer to [MEDrefer Manager Installation](#) for instructions on how to do this.


3. Click on the Submit an eForm button.





4. The Urgent Care Handover eForm will appear. Patient data will automatically complete sections of the form.

### Urgent Care GP Handover Form



#### Urgent Care GP Handover Form

**Clinical Data Source (eMR)**  
Best Practice Connected

**Patient**

Name: \* Ms Zeroch Abbagale

Phone: Mobile: Email:

Address: \* 45 Tone Cr

Somewhere 4350

Patient DOB: \* 02/02/1995 Age: 24 Gender: \* Female ▼

Indigenous Status: \* Neither Aboriginal nor Torres Strait Islander origin ▼

Employment Status: \* <--Select One--> ▼ Disability Support Pension: \* <--St ▼

**N.B.** - The first time you access the form, you may be presented with a prompt to authorise access to your clinical data. Click on Accept to authorise (Once authorised, you won't be prompted again).

### Urgent Care GP Handover Form

Please ensure your eMR is open with applicable patient. [Skip eMR authorisation](#)


## Authorisation

### General Practitioner BP

The launched application wishes to access the information listed below in your clinical system.

[Accept](#) [Decline](#)

**N.B** - If no patient record is open, a prompt to open a record will be shown. After opening the relevant patient record in your EMR click refresh in the eForm window to load their data to the form.



Urgent Care GP Handover Form

Clinical Data Source (eMR)

Best Practice Connected

**No patient record open.** [retry](#)

Patient

- Check the form has been fully completed, adding/selecting data as required. Make sure all sections marked with a red asterisk (\*) have been completed as the eForm will not send until they are.

**N.B.** - Appointment *end* date/time will only autofill if 'Finalise Visit' has been clicked already. If completing form during patient visit, this entry must be made manually.

- Enter the usual GP's details, ensuring that the fax number is correct.

Regular General Practitioner

Name: \* Title First Name Last Name Practice Name: \* Practice Name

Email: Email Address: Address City State Postcode

Phone: Phone

Fax: \* Fax

Urgent Care Practitioner

Name: Dr Ann Smiley Provider No.: 231654P

Address: Suite 4, 15 Erin Street Phone: Mt Tyson 4380 Fax: 07 9654 2966

Submit eForm


- Click Submit Form.

**N.B.** - If there are any compulsory sections (those marked with a red asterisk (\*)) that have not been completed your screen will move to the topmost section to be completed.







8. A pop-up will list receiving GPs name, clinic name and fax number. Double-check that these details are correct and click Submit eForm.

## Confirm Recipient Details

 You are about to submit your patient's clinical information to the practitioner whose information you have entered into this form. Please make sure that their details, especially the contact details are correct before proceeding.

### Recipient Details

-  Dr Charlotte Mackenzie
-  Midland Medical & Family Practice
-  08 9657 1258
-  *not entered*


Submit eForm

9. A final copy of the form will appear. Click on the Download PDF button to download or print.

## eForm Submitted

Urgent Care GP Handover Form

Download PDF



### Urgent Care GP Handover Form

#### Patient

Name: Ms	Zeroch	Abbagale
Phone:	Mobile:	Email:
Address: 45 Tone Cr Somewhere		4350
Patient DOB: 02/02/1995	Age: 24	Gender: Female
Indigenous Status: Neither Aboriginal nor Torres Strait Islander origin		
Employment Status: Full Time		Disability Support Pension: No

## View Your Sent Handover eForms

1. Click eForm Submissions.



A table of the submissions made will appear. Click on the unique 6-digit code to re-open eform to download or print again.

Past eForm Submissions				
Code	Patient	Recipient	eForm	Created On
<a href="#">0PX-M4K</a>	Ms Zeroch Abbagale	Dr James Alexander	Urgent Care GP Handover Form	2019-10-22 15:15:40 +1000
<a href="#">ZJK-2D9</a>	Mr Joe BloggsBP	Dr Hannah Mitchell	Urgent Care GP Handover Form	2019-10-22 15:59:55 +1000
<a href="#">Q0F-P0Z</a>	Miss Emerald Ruby	Dr Davey Simmons	Urgent Care GP Handover Form	2019-10-22 16:11:48 +1000

eForm Submitted

Urgent Care GP Handover Form

Download PDF

GP
+

URGENT CARE

Urgent Care GP Handover Form

Patient

Name: Ms
Zeroch
Abbagale

Phone:
Mobile:
Email:

Address: 45 Tone Cr  
Somewhere
4350

Patient DOB: 02/02/1995
Age: 24
Gender: Female

Indigenous Status: Neither Aboriginal nor Torres Strait Islander origin
Disability Support Pension: No

## Send a Test Handover Form

1. Create your GP profile, either through the Website or Best Practice
2. Install MEDrefer Manager and link your profile to the app.
3. Open a test/dummy patient record in your EMR.
4. Access the Handover form via the MEDrefer Manager icon in your system tray (bottom right of Windows desktops).



5. Click 'Submit an eForm'.
6. Try adding some realistic clinical information beyond that which was auto-populated from the test/dummy patient record.
7. For the regular GP's details, use your own practice details, including fax number.

Regular General Practitioner

Name: \* Title First Name Last Name Practice Name: \* Practice Name

Email: Email Address: Address

City State Postcode

Phone: Phone

Fax: \* Fax

8. Retrieve the fax and review its format - this is what the usual GP will receive when you start sending real Handover Forms.
9. *For the Practice Manager:* When all Urgent Care GPs have successfully sent a test Handover Form, please notify the WA PHA on [urgentcare@wapha.org.au](mailto:urgentcare@wapha.org.au).