Using MEDrefer Manager & Urgent Care Handover eForm

Practice Manager + Multiple GPs
(Best Practice Users)
October 2019 v2

Contents

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**.

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How to Use This Guide

This guide is intended for Practice Managers, 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 Best Practice, with multiple Urgent Care GPs and the support of an Admin team; if this does not describe your practice, please contact urgentcare@wapha.org.au who can supply you with another version more suited to your practice.

For Practice Managers/Admin Team to Complete

Create Your Own Profile

1. Go to the MEDrefer website at www.medrefer.com.au
2. Click on Register.

MEDrefer+ | Home | How It Works | Pricing | Referrals | About Us | Login | Register

3. Select your role within the practice as a Practice Manager/Receptionist.

About You

What is your role within the practice? *

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.

○ GP   ○ Specialist   ○ Allied Health Professional   ● Practice Manager/Receptionist

Name *

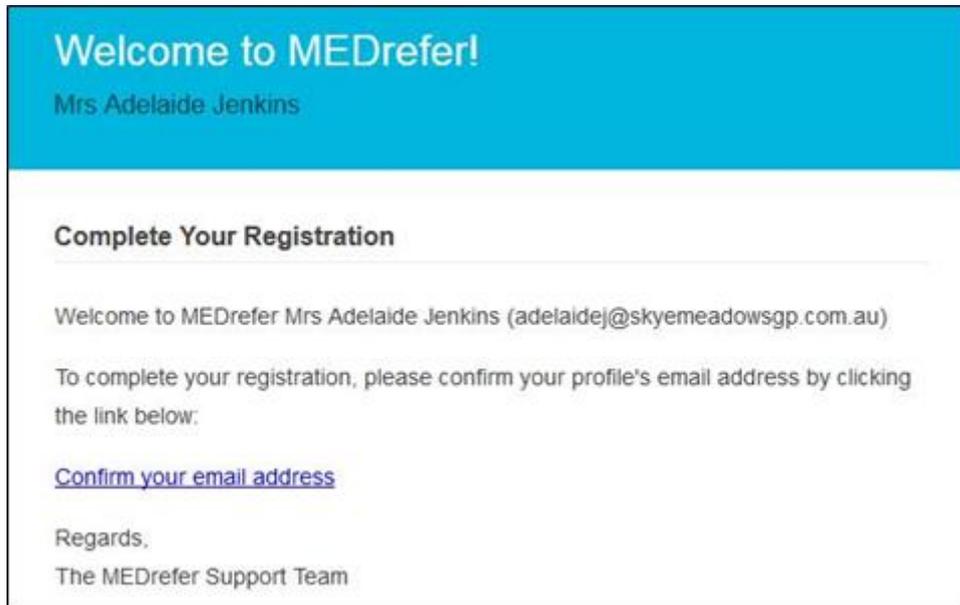| Dr ▼ | | |
| Title | First | Last |

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

☐ I'm not a robot — reCAPTCHA — Privacy - Terms

Sign up

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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.

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Create Your Practice Profile

Once you login you will enter the practice profile page.

MEDrefer⁺ Complete Your Setup

1 - Practice Details 2 - Practitioner Details 3 - Select Plans

Practice Details

Clinic/Hospital/Practice Name *	Manager's Name
Skye Meadows General Practice	Adelaide Jenkins
HPI-O	Clinical Software
NEHTA Organisational Id	Best Practice

Address *

11-13 Lallybrook Lane

Address Line 2

Skye Meadows	WA	4069

Practice Phone *	Fax
03 2687 3240	03 2687 3241
Practice Email	Website
reception@skyemeadowsgp.com.au	http://www.skyemeadowsgp.com.au

Create Practice

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

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Create Your Practitioner Profiles

1. Enter your practitioners' details, making sure to complete all sections marked with a red asterisk (*). Click Add.

You will see the list of practitioners and the details entered appear on the right as you click Add. Once all the practitioners have been entered, click Continue (You may need to scroll down to see this).

N.B. – If GP doesn't have a unique email to send the invitational email to, this step can be skipped. This will mean that the GP will not receive an email link to complete sign up and the Practice Manger will need to complete that step for them through their Launchpad. This will also mean that, for those GP's, the MEDrefer Manager app will need to be signed in under the Practice Manager not the GP.

List the practitioners at your practice

Add Your Practitioners

Enter the details of a Practitioner at your practice, using the form below, then click Add.

New Practitioner

Practitioner Name *

[▼] [   ] [   ]

Practitioner Type *

○ GP   ○ Specialist   ○ Allied Health

Provider Number *

[   ]

Practitioner Invite Email

[|]

Recommended. Invite this Practitioner to create their own account linked to the Practice so they can login themselves. Without doing so, all actions will be logged as having been performed by the Practice Manager, on behalf of the Practitioner.

(**Add**)

Your Practitioners @ My Practice

Dr Davey Ziegler (GP)
Provider Number: 4567853P
Invite Email: daveyzippey@yahoo.com   ✖

Dr Hannah Cleeves (GP)
Provider Number: 7564321J   ✖

Dr Michael Alexander (GP)
Provider Number: 8546253K
Invite Email: alex2alex@gmail.com   ✖

Dr Jessica Sampson (GP)
Provider Number: 569874L   ✖

(**Continue**)

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2. The screen will change to the Practice Managers Launchpad, where the practitioners will be shown as separate tiles. There are also tiles to **Add New Practitioners** or a **New Practice Site** if the Practice Manager manages more than one site.
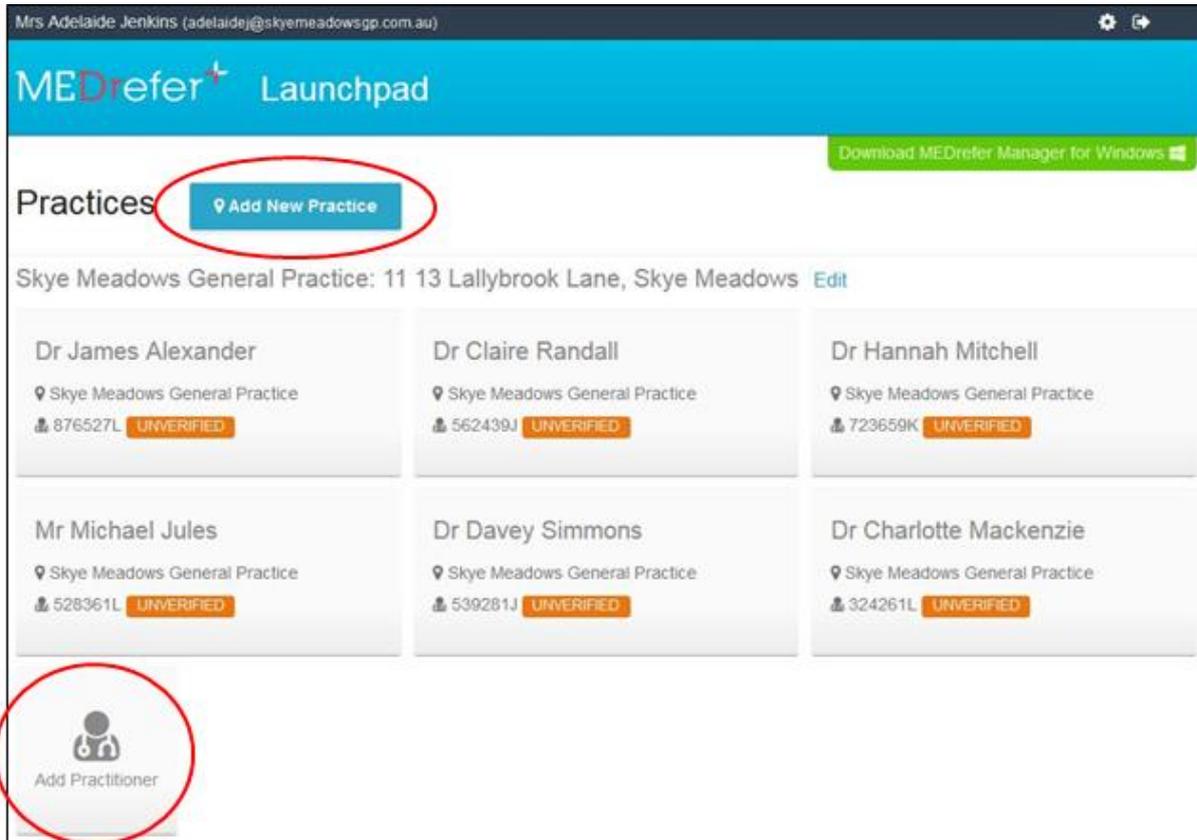
N.B. - If you are adding *existing practitioners* to a new site, make sure to click the 'Existing Practitioner' at the top of the page (It will automatically be marked 'New Practitioner'). A drop down box with the practitioners already registered will appear. Select the practitioner you wish to register at the new site, enter their provider number then click Add Practitioner.

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In the Practice Manager's Launchpad, the practitioner tiles will have an orange *Unverified* label on them. There are two ways to have this removed:

● **As Practice Manager** you can click on each tile, double check the entered details and add further details such as gender, qualifications, timezone, telehealth options, medical registration number and languages spoken as well as add an electronic signature of the practitioner to be added to be bottom of created referrals. Once the additions have been made, click on Update Practitioner.

The page will change to the practitioners' dashboard, where things like referrals created and their status can be seen.

To return to the Practice Managers Launchpad to continue verifying other GPs, click on the Home icon.

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- **The GP** can use the Invitation Email they are sent to activate their account, to confirm the details already entered and to add further details such as gender, qualifications, timezone, telehealth options, medical registration number and languages spoken as well as add an electronic signature which will be added to be bottom of created referrals.
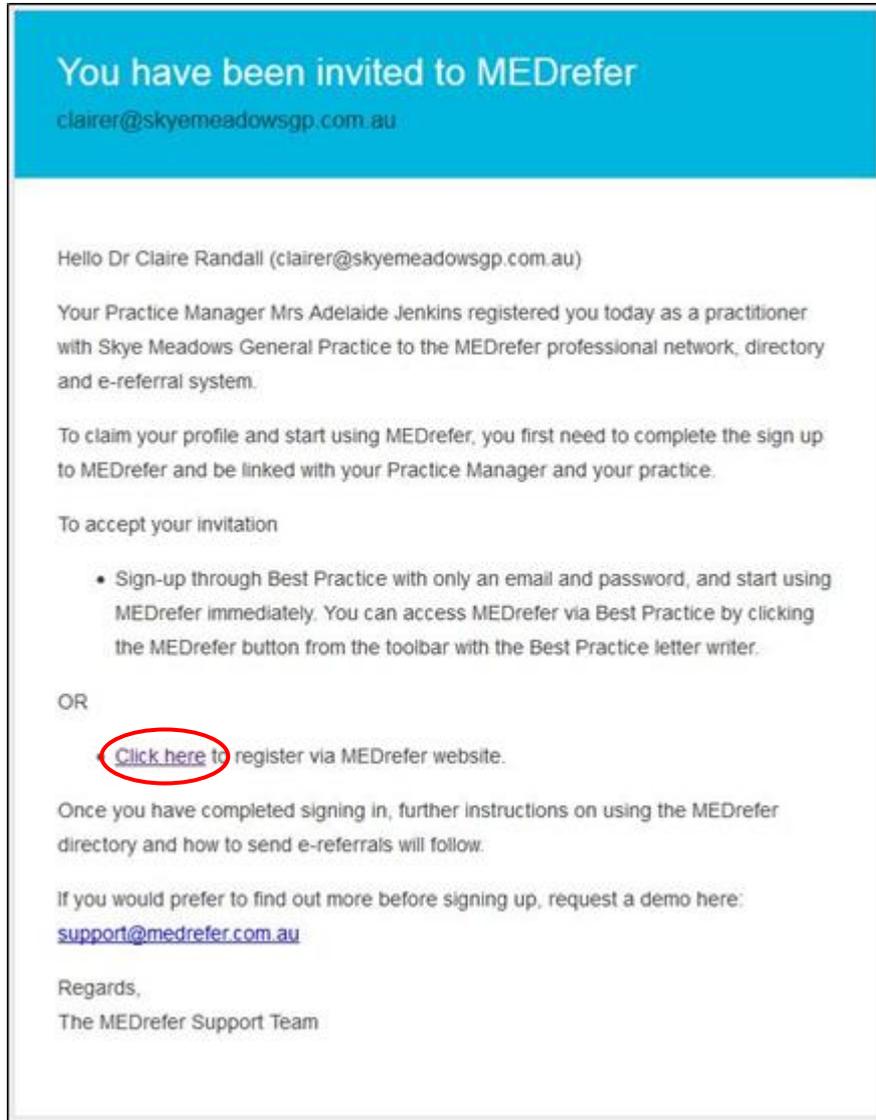

N.B. – This is an important step to complete, as Unverified GPs will not be recognised by the MEDrefer Manager app regardless of whether the app is signed in under the GP or the Practice Manager.

For GPs to Complete

Sign up as a GP via the Invitation Email Sent by Your Practice Manager

1. The Invitation Email will arrive at the email address entered in the Register page by the Practice Manager.

Click on the link to register via MEDrefer website.

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2. Create a password, tick the two boxes, click Claim Profile.

Create Password

Create a MEDrefer password below to claim your profile. This is for security purposes to protect both your information and the patient's.

Password

Confirm Password

☐ I agree to MEDrefer's Terms of Use.

☐ I agree for MEDrefer to contact me via email for occasional service updates.

Claim Profile

N.B. – Remember the password you created. You will need it later to link to your profile in the MEDrefer Manager app once that has been downloaded.

3. You will be taken to the Practitioner details page of your profile. The details already completed by the Practice Manager will be entered. There will still be some details to enter such as Gender, Medical Registration, Qualifications and Signature. Once all remaining details have been entered, click Update Practitioner.

Name *

| Dr ▾ | Ann | Smiley |

Gender

Undisclosed ▾

Select Your Practitioner Type *

◉ GP   ○ Specialist   ○ Allied Health

Qualifications

Medical Registration *

AHPRA ▾   Registration Number

Provider Number *

231654P

Scanned Signature Image

Browse... No file selected.

Update Practitioner

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

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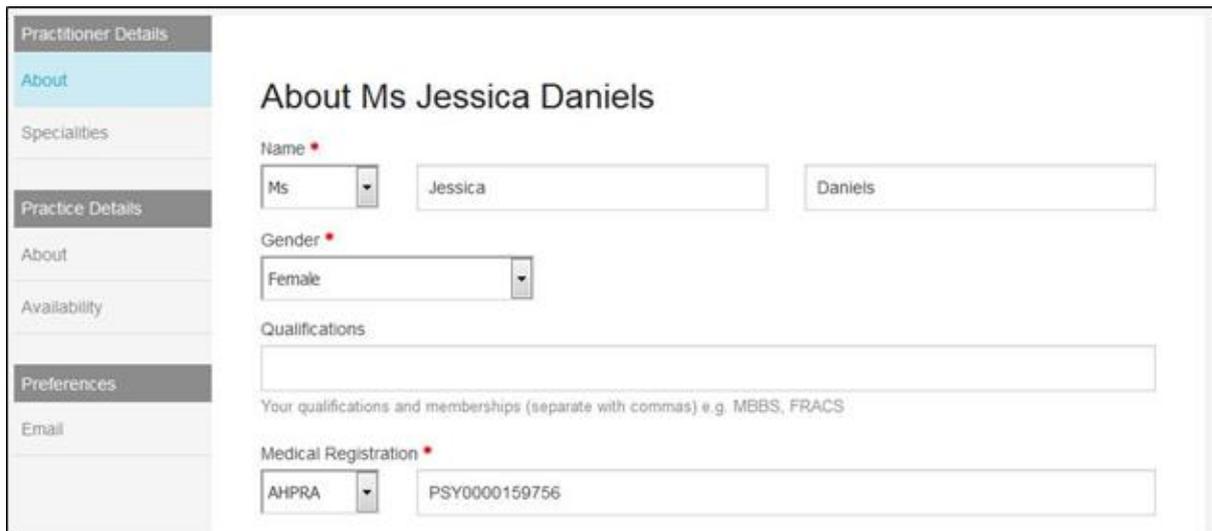**4.** You will automatically be taken to your personalised Dashboard.

Here you will be able to create referrals and see all the referrals you have created in the past and their status.

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

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6. This will take you to your Details sections – Practitioner Details, Practice Details, Preferences.

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.

7. Once details in each section are complete, click the blue Update button before moving to the next section.
8. 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.
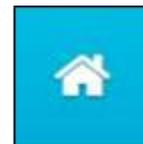
MEDrefer Manager Installation (to be completed on all GP and Nursing Workstations)

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) and login to it.
2. From the dashboard screen, click on the Home icon at the top of the screen.
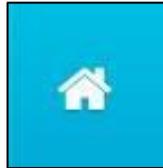
3. Click on the green 'Download MEDrefer Manager for Windows' link to take you to the MEDrefer Manager page.
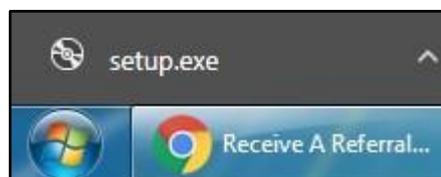
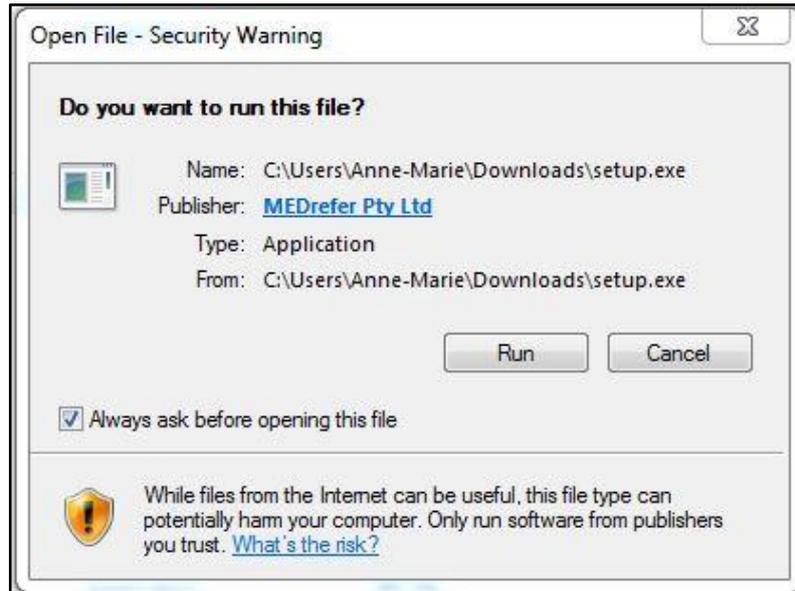4. Click on the green 'Download MEDrefer Manager' link.

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.

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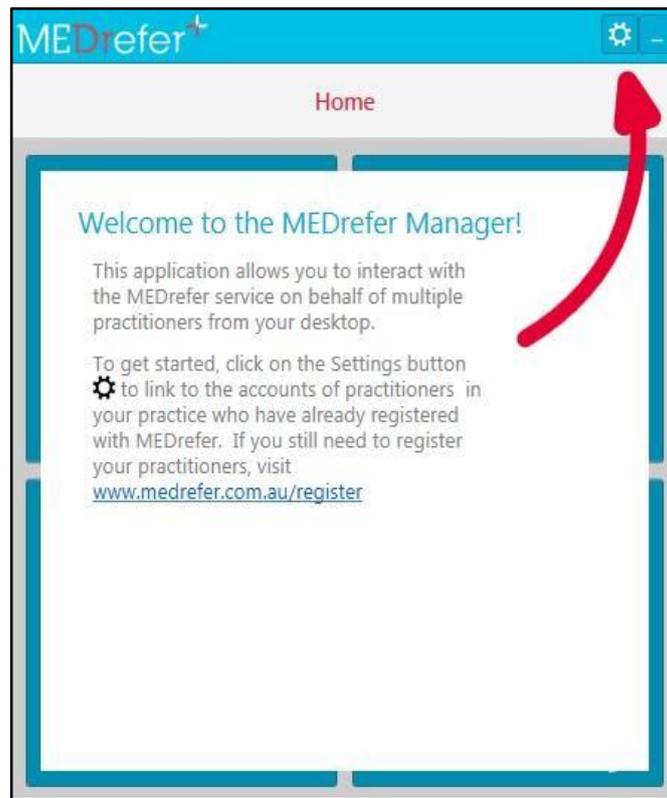
9. In the Users tab, add the email address and password of the Practice Manager or the unique email and password of a practitioner who has already been registered, then click Link User.

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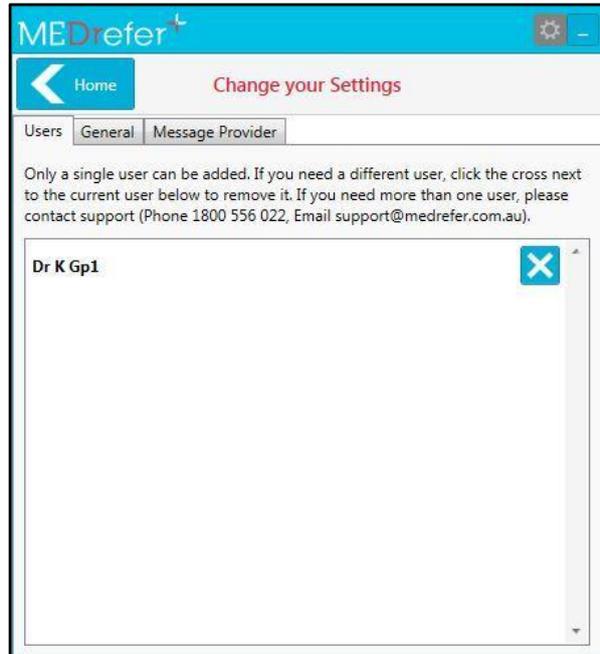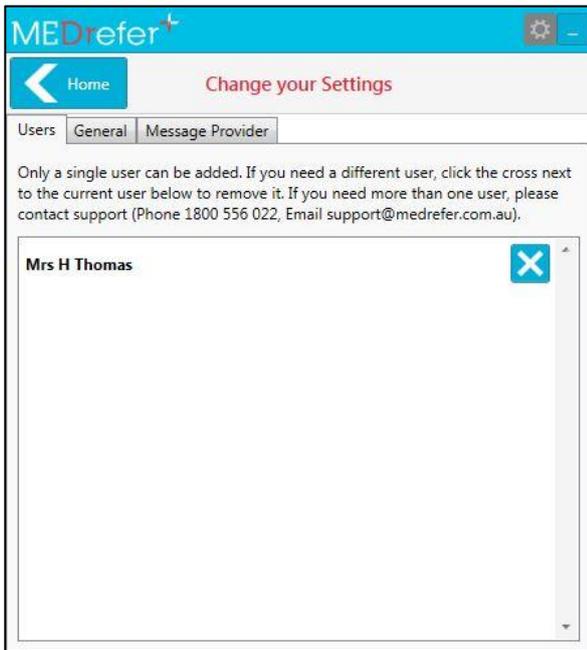
Your setup has now been completed. Click on Home to go to the main screen.

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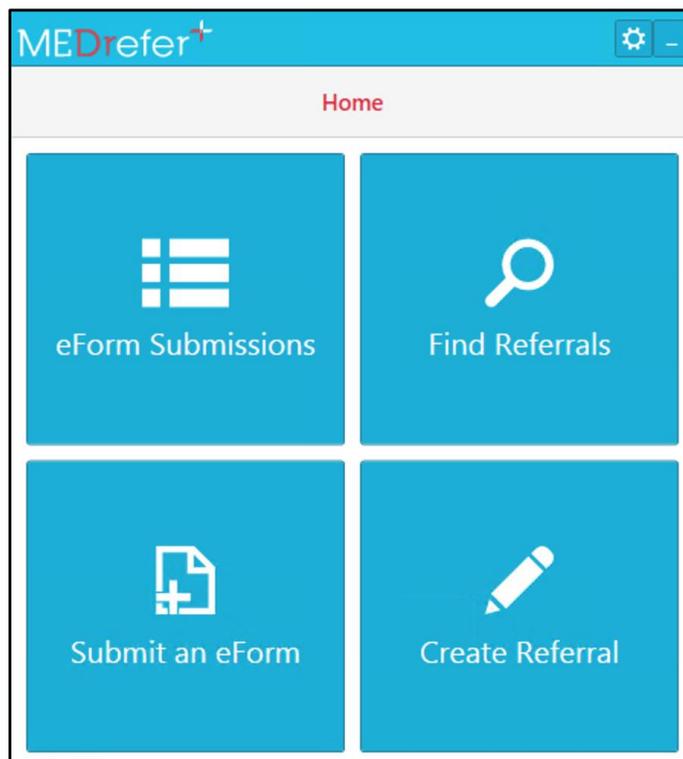
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MEDrefer Manager will reside within the taskbar (hidden or visible) and can be maximised and/or minimised as required.
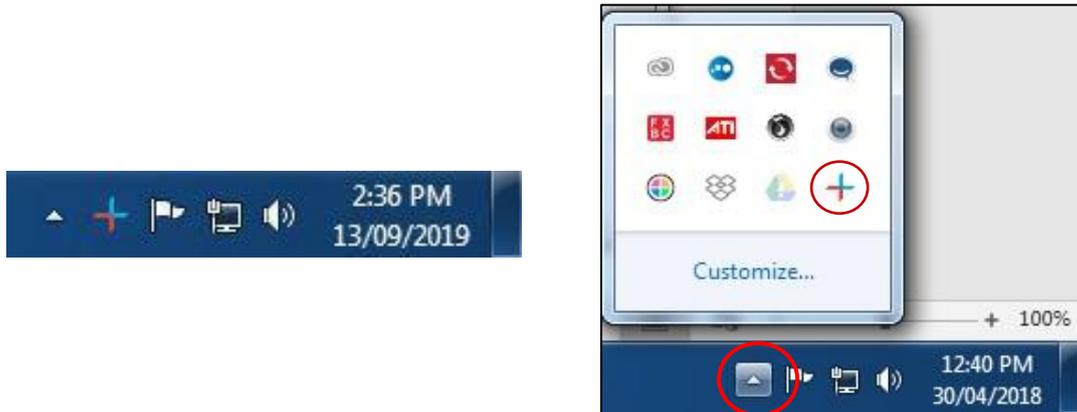
N.B. - If multiple GPs and/or Nurses are using the same workstation, MEDrefer Manager will need to be installed once for each workstation login.

For example – Dr Guthrie and Dr Heinrich use the same office for their consults and therefore the same desktop computer. MEDrefer Manager will need to be downloaded when Dr Guthrie is signed into the desktop and again when Dr Heinrich is signed into the desktop.

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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.

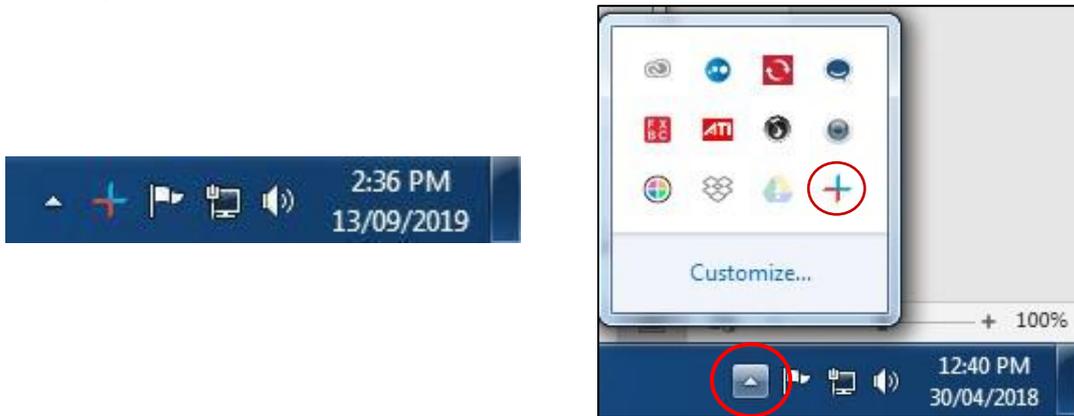**N.B. -** If you have not yet installed the application, refer to MEDrefer Manager Installation for instructions on how to do this.

3. Click on the Submit an eForm button.
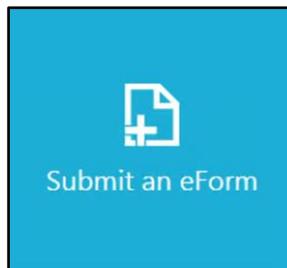
If MEDrefer Manager is signed in **under the Practice Manager**, move forward to **Point 4**.

If MEDrefer Manager is signed in **under a GP**, move forward to **Point 6**.

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4. As the MEDrefer Manager app is signed in under the Practice Manager, a pop-up will appear with each registered GPs name. The GP submitting the eForm will need to select their name.

N.B. – If the Practice Manager is registered at multiple sites, the GPs will be listed under each site. If the GP is *also* listed at multiple sites, they will need to ensure they select their name under the correct site.

Please Choose who you want to act on behalf of

Practices

Skye Meadows Medical Practice: 28 Mackenzie Street, Wherestop

Dr Peter Simmons	Dr Lucy Tindle
♥ Skye Meadows Medical Practice	♥ Skye Meadows Medical Practice
👤 987654K	👤 951236P

5. The selected GPs name will appear at the top of the form in the red banner. To change the name, click on the Switch icon at the end of the name. The pop-up with all the registered GPs will reappear.

MEDrefer+   Acting on behalf of: Dr Lucy Tindle ⤬

Urgent Care GP Handover Form

GP URGENT CARE   Urgent Care GP Handover Form

Clinical Data Source (eMR)
⊘ Best Practice Connected

N.B. – The selecting of the GPs name will only need to happen once, and then MEDrefer Manager will remember and automatically select the chosen GP until a new name is selected or the practitioner fully Exits out of MEDrefer Manager.

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6. The Urgent Care Handover eForm will automatically complete sections of the form.

Urgent Care GP Handover Form

GP URGENT CARE

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:* <--Se ▾

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

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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.

7. 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.

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

9. 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.

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10. 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

11. A final copy of the form will appear. Click on the Download PDF button to download or print. Downloaded PDF copies of the form can be saved to the patients' file in the usual manner.

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
Employment Status: Full Time   Disability Support Pension: No

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View Your Sent Handover eForms

1. Click eForm Submissions.

N.B. – If the MEDrefer Manager app is signed in under a Practice Manager, a pop-up will appear listing all the registered GPs under their registered sites.

1. Select the GP you wish to view submission for. The chosen name will appear at the top of the eForm in the red banner. To change the name, click on the Switch icon at the end of the name and the registered GP listing will appear again.

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2. 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
0PX-M4K	Ms Zeroch Abbagale	Dr James Alexander	Urgent Care GP Handover Form	2019-10-22 15:15:40 +1000
ZJK-2D9	Mr Joe BloggsBP	Dr Hannah Mitchell	Urgent Care GP Handover Form	2019-10-22 15:59:55 +1000
Q0F-P0Z	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
Employment Status: Full Time   Disability Support Pension: No

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Send a Test Handover eForm

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. If need be, select your name from the Practice Managers selection.
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.

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.