

Correspondence Management with Medical Director

For Medical Director 3.15 or later

This guide presents the various methods for importing correspondence into Medical Director, and helps you establish which method best suits your Practice's workflow.

The information contained herein is an overview designed to be used in conjunction with the Medical Director Help file, which provides detailed information about correspondence management beyond the scope of this guide.

Note also that this guide is designed specifically for users of Medical Director 3.15 or later. A version of this document for earlier releases is available from the HCN Knowledge Base at www.hcn.com.au/kb



Which Workflow Meets the Needs of your Practice?

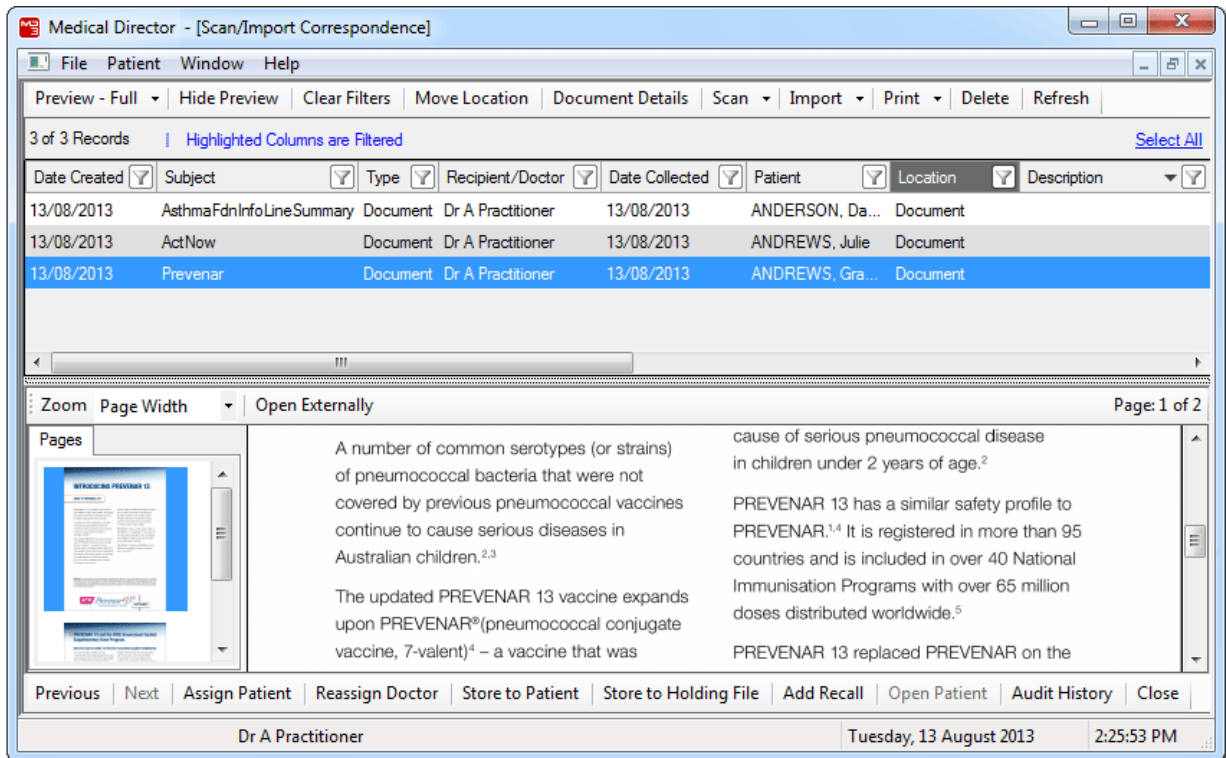
Check which workflow is applicable to your practice before using Medical Director 3.15 or later.

<input type="checkbox"/>	Workflow 1 (page 3)	Workflow 1 – via Scan/Import Correspondence window (Store to Patient) <ol style="list-style-type: none">1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are reviewed and stamped by practitioners.2. Practice staff scan/import these documents in bulk, and store results within the patient's record via Document Holding Bay (<i>pre MD 3.14</i>).
<input type="checkbox"/>	Workflow 2 (page 5)	Workflow 2 – via Patient's Clinical Window <ol style="list-style-type: none">1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are reviewed and stamped by practitioners.2. Practitioner or practice staff scan/import these documents and store the results <i>directly to the patient's clinical record</i>.
<input type="checkbox"/>	Workflow 3 (page 7)	Workflow 3 – via Scan/Import Correspondence Window (Store to Holding File – Manual Transfer) <ol style="list-style-type: none">1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) not review yet by the practitioner are scanned/imported by practice staff that have a minimum level of 'Basic' security access.2. Practitioner reviews and actions the scanned/imported results before storing to the patient's clinical record.
<input type="checkbox"/>	Workflow 4 (page 9)	Workflow 4 – via Scan/Import Correspondence Window (Store to Holding File – Automatic Transfer) <ol style="list-style-type: none">1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) not review yet by the practitioner are scanned/imported by practice staff that have a minimum level of 'Basic' security access.2. Practitioner reviews and actions the scanned/imported results before storing to the patient's clinical record.
<input type="checkbox"/>	Workflow 5 (page 11)	Workflow 5 – via the Holding File <ol style="list-style-type: none">1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) not review yet by the practitioner are scanned/imported by practice staff that have a minimum level of 'Limited' security access.2. Practitioner reviews and actions the scanned/imported results before storing to the patient's clinical record.

Workflow 1 – Via the Scan/Import Correspondence Window (Store to Patient)

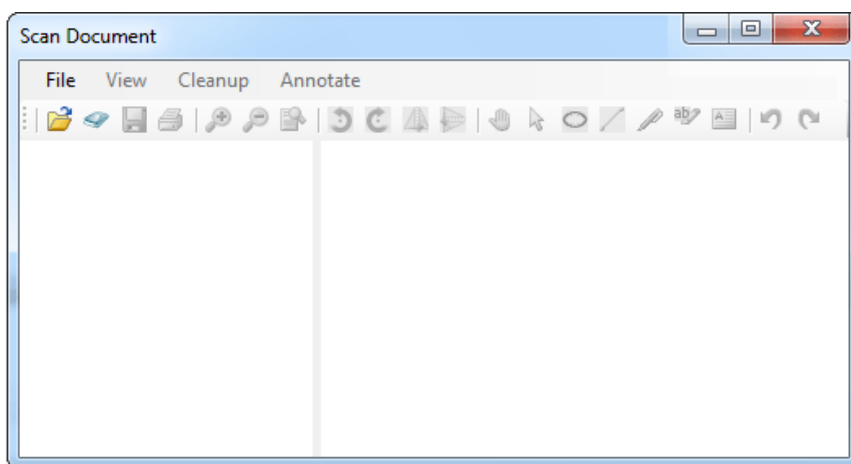
The Scan/Import Correspondence Windows is available to all users.

1. Log into Medical Director as *any user*, select **File > Scan/Import Correspondence**. The **Scan/Import Correspondence Window** appears. When opening this window, the default view is filtered to display *only* those items scanned or imported by the user currently logged into Medical Director. To display items scanned/imported by *all* users, click the **Clear Filters** button.



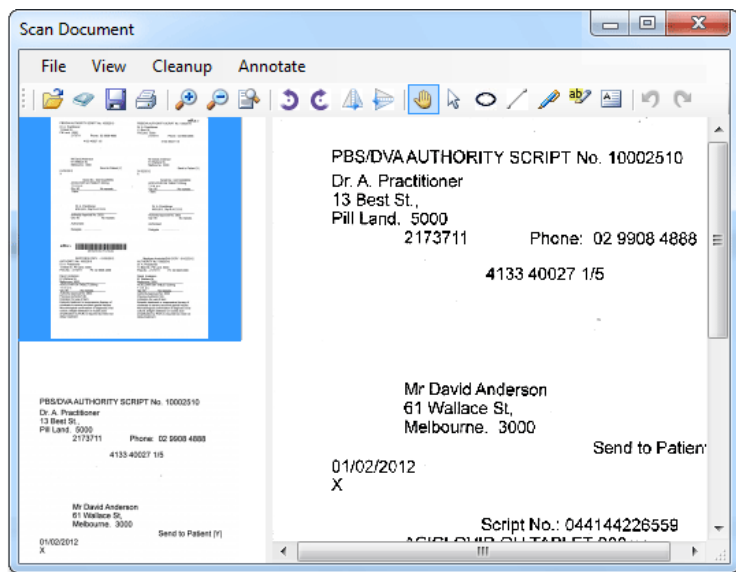
Please see 'The Scan/Import Correspondence Window' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
 - If you choose to import a document, you will be asked to select a document to import. Skip to Step. 6.
 - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.
3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.





- Upon completing the scan you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

- Click the **Save** button to save the current document.
- The **Document Details** window appears. Enter details as desired. It is advisable to associate this document with a patient, and assign it to a doctor at this time also.

- Click the **OK** button to confirm and save the information. You will be returned to the Save/Import Correspondence Window.
- With the new record selected, click the **Store to Patient** button. The record will be removed from the Scan/ Import Correspondence window, and saved to the Patient's clinical window.

This concludes the steps for scanning/importing documents into the patient's record via the Scan/Import Correspondence window.



Workflow 2 – Via the Patient’s Clinical Window

This method is *not* available to users with ‘Basic’ access.

1. Within the patient’s Clinical Window, select either of the Correspondence, Results, Letters, or Documents tabs. You can import/scan from any of these tabs, and then move the resulting document between tabs if you wish. As the Correspondence tab displays a culmination of documents from other tabs, it will be used for the remainder of this example workflow.

The screenshot shows the 'Correspondence' tab in the Medical Director interface. The top toolbar includes buttons for Summary, Current Rx, Progress, Past history, Results, Letters, Documents, Old scripts, Imm., Pap Test, Obstetric, Correspondence, and MDExchange. Below the toolbar is a list of 15 records. The selected record is 'MASTER FULL BLOOD CO...' dated 22/08/2012, with a description 'MASTER FULL BLOOD CO...', type 'Pathology', and recipient 'DR A PRACTITIONER'. The patient details section shows: Start Patient: Andrews, Jennifer; 2 Kennedy Road, Bundaberg QLD 4670; Birthdate: 20/04/1970; Age: Y42; Sex: Female; Telephone: ; Your Reference: ; Lab Reference: 05-6372125. The lab results section shows: FULL BLOOD EXAMINATION; Haemoglobin: 145 g/L (115-160); Red Cell Count: 4.5 x10¹²/L (3.6-5.2); Haematocrit: 0.38 (0.33-0.46); Mean Cell Volume: 94 fL (80-98).

Date Created	Subject	Description	Type	Notation	Comment	Recipient/Doctor	Date Collected	Location
26/08/2013	Photo	Photo of big toe	Document			Dr A Practitioner	26/08/2013	Document
22/08/2012	Photo	photo of a skin mark	Document			Dr A Practitioner	22/08/2012	Document
22/08/2012	E/LFT (MASTER)		Pathology	No action		DR A PRACTITIONER	17/08/2012	Result
22/08/2012	MASTER FULL BLOOD CO...		Pathology	No action		DR A PRACTITIONER	17/08/2012	Result
22/08/2012	MASTER IRON STUDIES		Pathology	No action		DR A PRACTITIONER	17/08/2012	Result
27/08/2010	PAP SMEAR		Pathology	No action		DR A PRACTITIONER	25/08/2010	Result

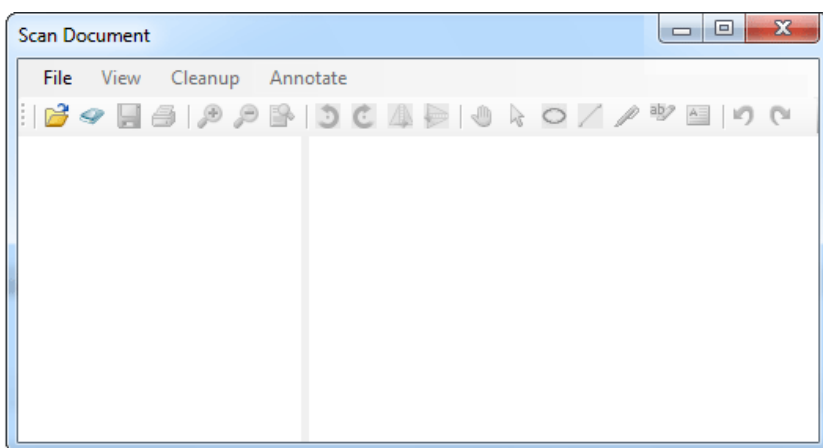
Start Patient : Andrews, Jennifer
2 Kennedy Road, Bundaberg QLD 4670
Birthdate: 20/04/1970 Age: Y42 Sex: Female
Telephone:
Your Reference :
Lab Reference : 05-6372125

MASTER FULL BLOOD COUNT
Lab. Reference: 05-6372125-CBC-0
Requested: 17/08/2012 Complete: Final
Performed: 17/08/2012
Demotown Pathology

FULL BLOOD EXAMINATION
Haemoglobin 145 g/L (115-160)
Red Cell Count 4.5 x10¹²/L (3.6-5.2)
Haematocrit 0.38 (0.33-0.46)
Mean Cell Volume 94 fL (80-98)

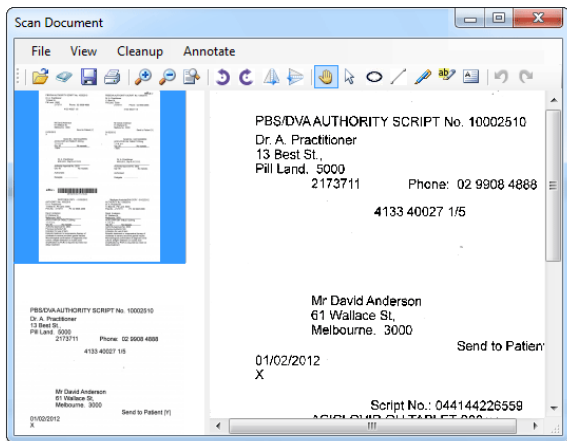
Please see 'Correspondence Tab' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
 - If you choose to import a document, you will be asked to browse to and select a document to import. Skip to Step. 6.
 - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.
3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.





- You will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

- Click the **Save** button to save the current document.
- The **Document Details** window appears. Enter details as desired. The Subject and Document Type is required information. As you have scanned/imported this document within a specific patient's record, it is assumed that it belongs to this patient, and as such they will be selected by default, as shown in the following image. You can always associate it with another patient if you wish. It is advisable to assign this document to a practitioner at this time also.

- Click the **OK** button to confirm and save the information. You will be returned to the Clinical Record.

This concludes the steps for scanning/importing documents directly to the patient's record.

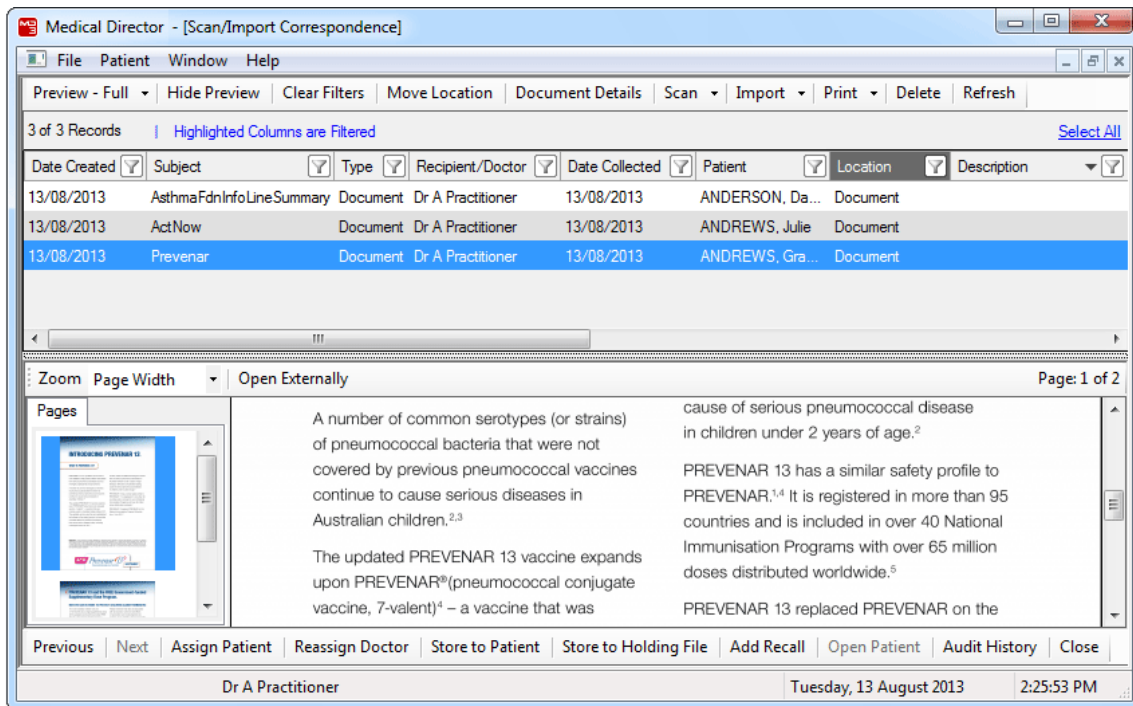
Workflow 3 – Via the Scan/Import Correspondence Window

Store to Holding File – Manual Transfer

This workflow assumes you have the **Show Scan/Import Correspondence in Holding File** option *un-ticked*. This option is available via Tools > Options > Investigations tab.

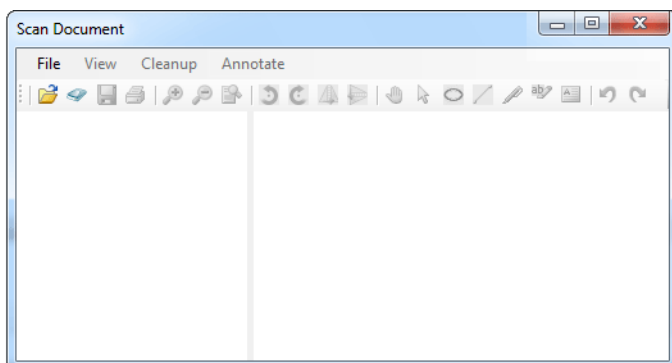
The Scan/Import Correspondence window is available to all users.

1. Log into Medical Director as *any user*, select **File > Scan/Import Correspondence**. The **Scan/Import Correspondence Window** appears. When opening this window, the default view is filtered to display *only* those items scanned or imported by the user currently logged into Medical Director. To display items scanned/imported by *all* users, click the **Clear Filters** button.



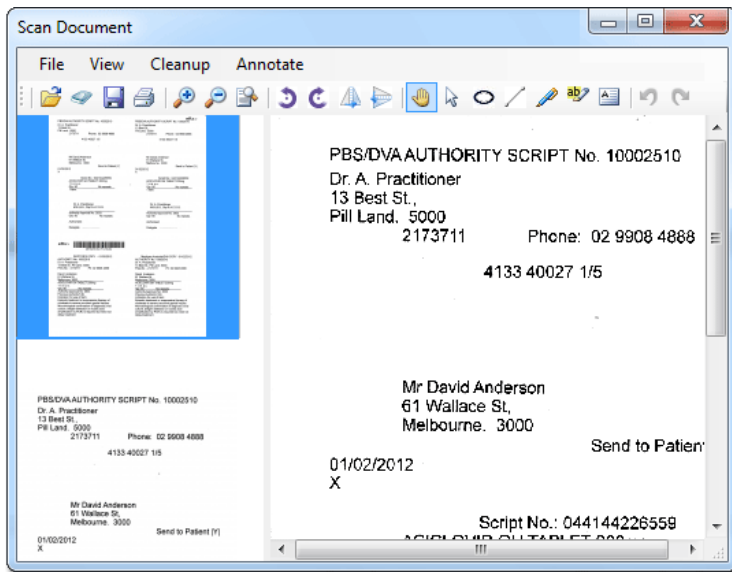
Please see 'The Scan/Import Correspondence Window' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
 - If you choose to import a document, you will be asked to select a document to import. Skip to Step 6.
 - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.
3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.





- Upon completing the scan you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

- Click the **Save** button to save the current document.
- The **Document Details** window appears. Enter details as desired. It is advisable to associate this document with a patient, and assign it to a doctor at this time also.

- Click the **OK** button to confirm and save the information. You will be returned to the Save/Import Correspondence Window, where the new record is now available.
- With the current result selected, click the **Store to Holding File** button. The result is removed from the Scan/Import Correspondence window and placed within the Holding File ready for the practitioner to action it.

This concludes the steps for scanning/importing result into the Scan/Import Correspondence window. Results added to Medical Director in this way will appear within the Holding File, ready to be actioned by a doctor, after which they will be removed from both windows, and stored within the patient's record.

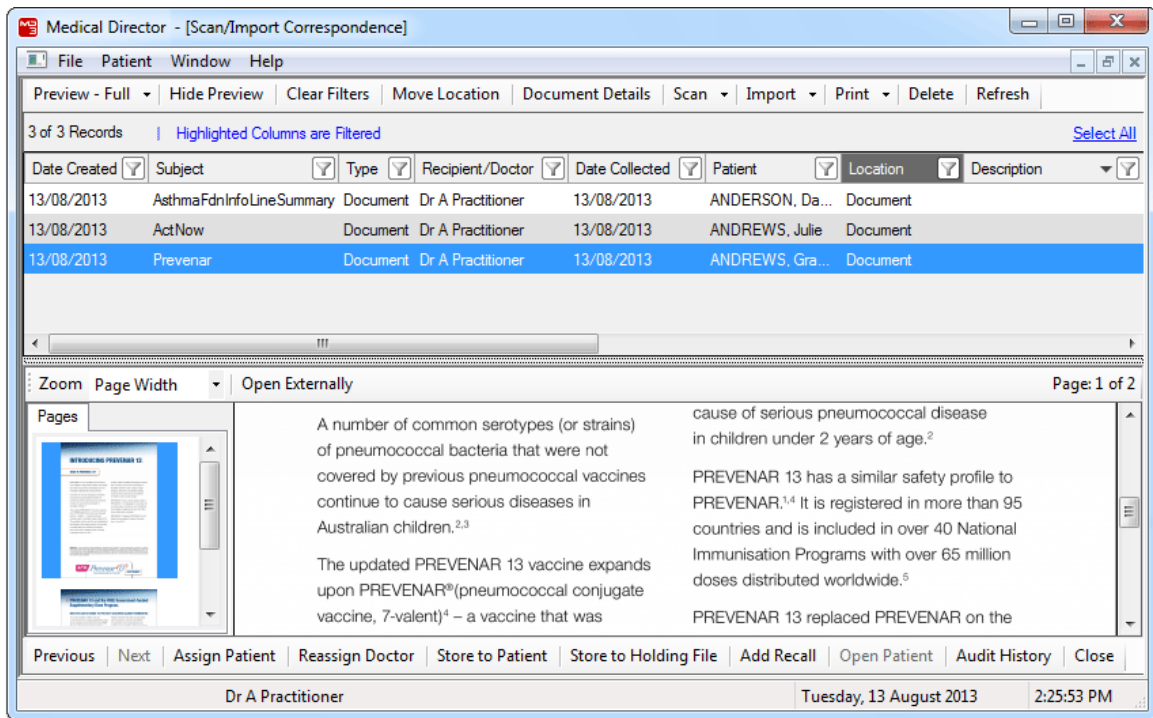
Workflow 4 – Via the Scan/Import Correspondence Window

Store to Holding File – Automatic Transfer

This workflow assumes you have the **Show Scan/Import Correspondence in Holding File** option *ticked*. This option is available via Tools > Options > Investigations tab.

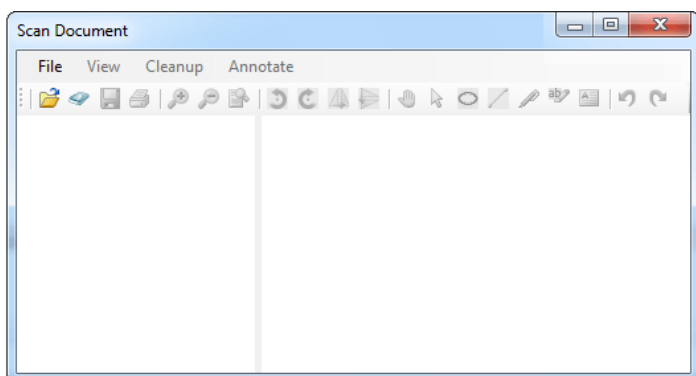
The Scan/Import Correspondence window is available to all users.

1. Log into Medical Director as *any user*, select **File > Scan/Import Correspondence**. The **Scan/Import Correspondence Window** appears. When opening this window, the default view is filtered to display *only* those items scanned or imported by the user currently logged into Medical Director. To display items scanned/imported by *all* users, click the **Clear Filters** button.



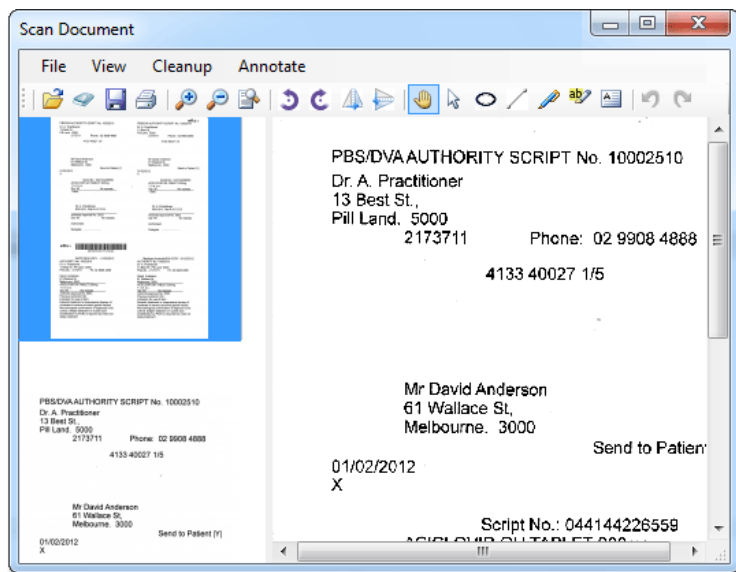
Please see 'The Scan/Import Correspondence Window' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
 - If you choose to import a document, you will be asked to select a document to import. Skip to Step. 6.
 - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.
3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.





- Upon completing the scan you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

- Click the **Save** button to save the current document.
- The **Document Details** window appears. Enter details as desired. It is advisable to associate this document with a patient, and assign it to a doctor at this time also.

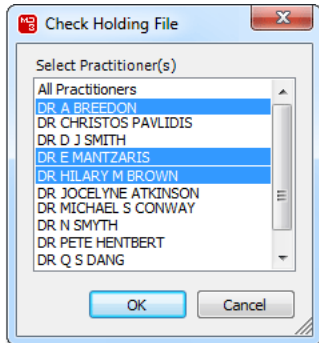
- Click the **OK** button to confirm and save the information. You will be returned to the Save/Import Correspondence Window, where the new record is now available. Note that this record will also be visible in the Holding File.

This concludes the steps for scanning/importing result into the Scan/Import Correspondence window. Results added to Medical Director in this way will appear within the Holding File, ready to be actioned by a doctor, after which they will be removed from both windows, and stored within the patient's record.

Workflow 5 – Via the Holding File

This is accessible to practitioners and users with Full Access where the 'Display Results to Staff' Investigations option is enabled.

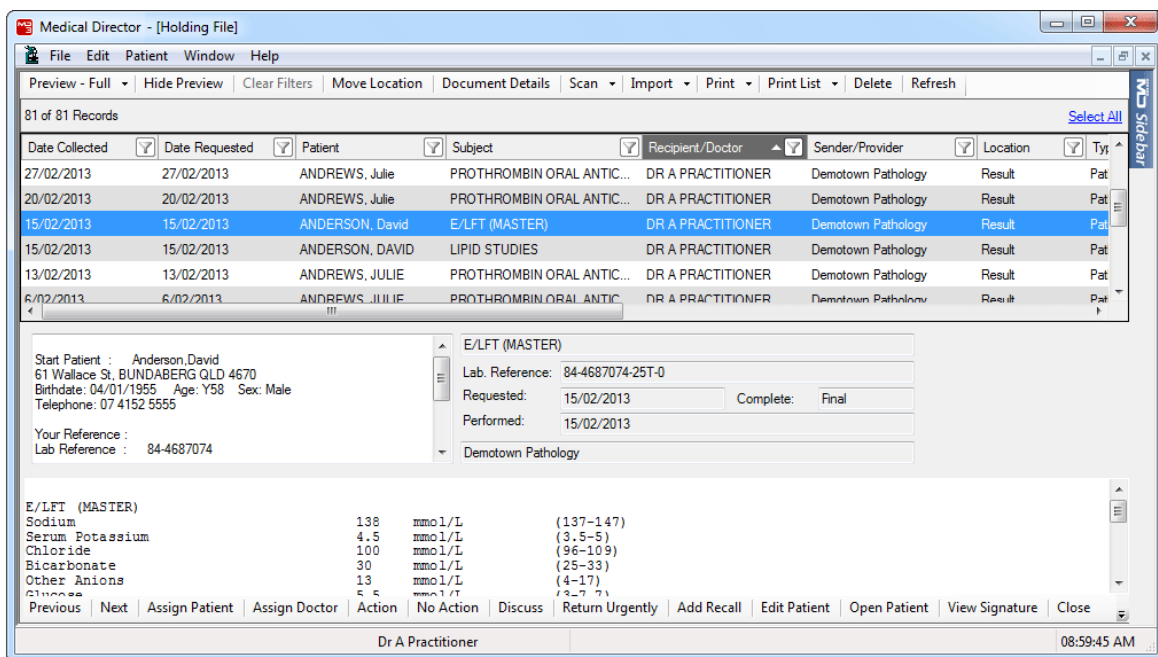
1. Log into Medical Director as a *practitioner*, select **Correspondence > Check Holding File**. You will be prompted to select one or more practitioners whose results you wish to examine.



2. From this window select the practitioner(s) whose results you wish to examine:
 - Select a single practitioner by clicking their name, and then clicking the **OK** button to open the Holding File to display only their results. Alternatively you can double-click a name to select them and open the Holding File.
 - Select multiple practitioners by clicking each name. To deselect a name, simply click it again. Then, click the **OK** button to open the Holding File to display only the results of the selected practitioners.
 - Select all practitioners by clicking the All Practitioners option. Clicking the **OK** button then opens the Holding File to display results for all practitioners. Alternatively you can double-click the All Practitioners option to simultaneously select all practitioners and open the Holding File.

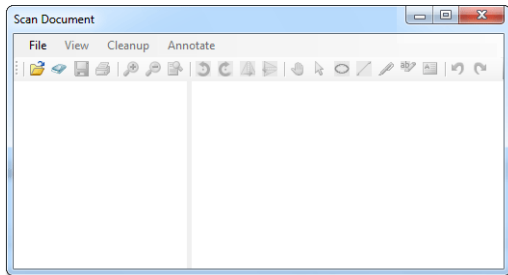
Note that, as making a selection from this window locks the results associated with the selected practitioner, it is recommended that you select only a specific practitioner, as selecting All Practitioner will prevent others from accessing any results whilst you have the Holding File open.

3. You will be presented with the **Holding File**.

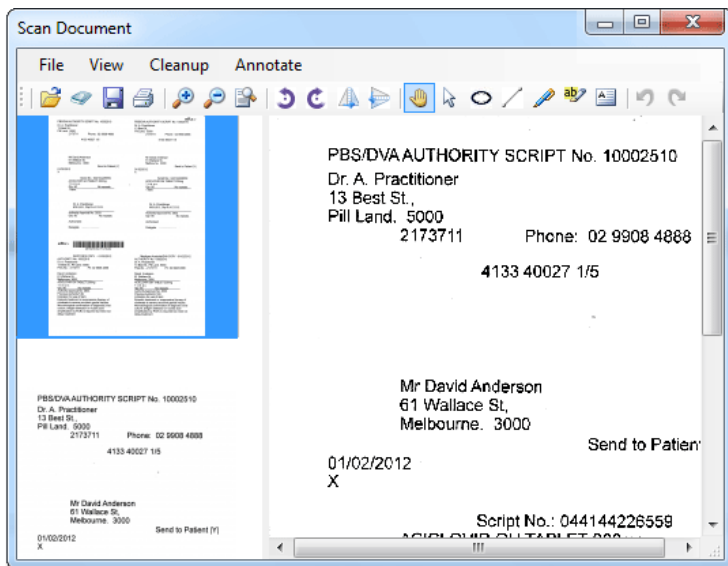




4. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
 - If you choose to import a document, you will be asked to select a document to import. Skip to Step 7.
 - If you choose to scan a document, the scanning utility will appear. Continue now to Step 5.
5. If you choose to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and the Scan Document window.



6. Upon completing the scan, you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

7. Click the **Save** button to save the current document. The **Document Details** window appears. Enter details as desired. It is advisable to associate this document with a patient, and assign it to a doctor at this time also.



8. Click the **OK** button to confirm and save the information. You will be returned to the Holding File.

This concludes the steps for scanning/importing documents into the Holding File.

From within the Holding File, you can now;

- Associate a selected record with a different patient.
- Assign a selected record to a different practitioner.
- Modify a document's details.
- Action results/records.
- Add Recalls.
- Indicate on which tab within the Clinical Window a selected document should reside once saved to the patient's record.
- View the digital signature (if available) associated with any selected document.
- View an audit trail of modifications made to a selected record.

Please see 'The Holding File' in Medical Director Help for further information.

Health Communication Network Limited
Level 4, 201 Pacific Highway,
St Leonards, NSW 2065
Tel: +61 2 9906 6633
Fax: +61 2 9906 8910
www.hcn.com.au

A.B.N. 76 068 458 515
Copyright© 2013