



# MedicalDirector®

## MedicalDirector Clinical & PracSoft Connect Release Notes

The following information outlines the enhancements, modifications and fixes contained in the MedicalDirector Clinical/PracSoft 3.16 update, released 2015. This information is also available for download as a PDF file from the MedicalDirector Knowledge Base at [www.medicaldirector.com/kb](http://www.medicaldirector.com/kb). The 3.16 release is a *full release*, and can be installed over 3.12.



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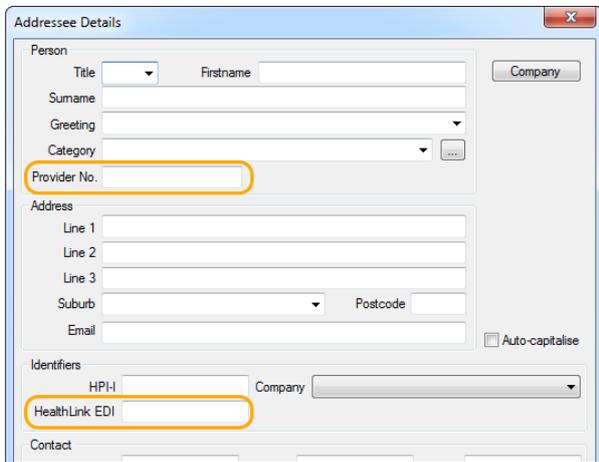
## Content for MedicalDirector Clinical

### Address Book

- MDExchange recipients are now identified in the Address Book with the  icon.

MDX	Name	Category	Phone - Business
	BLOGGS, Dr. Mary	General Medicine	07 4345 7893
	CHARLTON, Dr. Susan	Dermatology	07 4234 5785
	DAVISON, Dr. Thomas	Obstetrics/Gynaecology	07 4981 1234
	Demotown Imaging	Radiology	07 4234 6742
	Demotown Pathology	Pathology	07 9345 2357
	MAC DONALD, Dr. David	General Surgery	07 4567 3967
	Maternity & Antenatal Services	Obstetrics & Gynaecology	07 4256 5679
	MOORE, Dr. Michael	General Surgery	07 4356 7892

- 'Provider No' and [HealthLink](#) EDI fields now available to the Addressee Details window for 'person' entries in the Address Book.



The screenshot shows the 'Addressee Details' window for a person. The 'Provider No.' field is highlighted with an orange box. The 'HealthLink EDI' field is also highlighted with an orange box. Other fields include Title, Firstname, Surname, Greeting, Category, Address (Line 1, Line 2, Line 3, Suburb, Postcode, Email), and Identifiers (HPI-I, Company).

### Assessments

- An **ADF Post-Discharge GP Health Assessment** is available from the Assessment menu within a patient's record.

The assessment is designed to assist GPs identify and diagnose the early onset of physical and/or mental health problems among former serving members of the Australian Defence Force (ADF).

The assessment is based on well validated screening measures which target:

- Levels of physical activity
- Chronic pain
- Sleep
- Alcohol and substance use
- Post-traumatic stress disorder
- Psychological health and sexual health

*For detailed information about the ADF Assessment, search for "ADF Post-Discharge GP Health Assessment" in the Help.*



## Correspondence

### Correspondence Received Electronically

Correspondence received electronically via HL7/PIT will now have the patient demographic details displayed in the preview window.

### SMS Reminder Messages

SMS reminder messages for Recalls and Results notifications can now be sent to patients via the following MedicalDirector Clinical modules:

- Actioned Items
- Correspondence tab
- Documents tab
- Letters tab
- Recall Searches
- Results tab

Message transfer is managed by MessageNet, with whom you must register in order to send SMS messages. If you are also a MedicalDirector PracSoft user, and have already been using SMS messaging, your SMS username and password is automatically recognised within MedicalDirector Clinical – *no further registration is required*.

Two default SMS message templates are available;

- **Recall** templates are available to the Recalls module only.
- **Correspondence** templates are available to all other SMS-supported modules.

Users may also customise their own templates.

SMS registration, the SMS Log, and SMS template management is located under the **Correspondence** menu.

### SMS Logs

An audit trail of sent reminders can be seen via SMS Logs. Message details, including the status and status message can be viewed from this log. Resending messages is also available in this module.

Date Created	Patient	Mobile	Accepts SMS	Created By	Status	Status Time	Status Message
30/09/2015 2:04 PM	Henry WATLAND		Yes	Dr A Practitioner	Not Sent	30/09/2015 2:04 PM	Message not sent. Patient's mobile number is invalid.
30/09/2015 2:03 PM	Heather ANDREWS	0411111111		Dr A Practitioner	Queued	30/09/2015 2:03 PM	Operation completed successfully.
30/09/2015 2:03 PM	David ANDERSON	0411111111		Dr A Practitioner	Sent	30/09/2015 2:03 PM	Operation completed successfully.
30/09/2015 2:02 PM	John ANDREWS	0411111111		Dr A Practitioner	Sent	30/09/2015 2:02 PM	Operation completed successfully.
30/09/2015 11:52 AM	Carolina SCHEIN	0411111111	Yes	Dr A Practitioner	Not Sent	30/09/2015 11:52 AM	Message not sent. Patient's mobile number is invalid.

Status Time	Performed By	Status	Status Message
30/09/2015 2:02 PM	System	Sent	Operation completed successfully.

**FOLLOW-UP**  
John, your GP has a Letter regarding 'Moving Practice Location!' for you.

**Status:** Sent  
**Status Message:** Operation completed successfully.

For detailed information about sending SMS messages, search for "SMS" in the Help.

- Printed address labels now display the patient's State of residence, in compliance with Australia Post's 'Clean Mail' guidelines.

## eOrders

eOrders is a system for securely ordering SDS-based pathology and cytology requests electronically via MedicalDirector Clinical. The following laboratories support eOrders functionality: **ABT**: Abbott Pathology, **DOR**: Dorevitch Pathology, **GPS**: Gippsland Pathology, **LAV**: Lavery Pathology, **QML**: QML Pathology, **TML**: Tasmanian Medical Laboratories, **WDP**: Western Diagnostic Pathology. Initially eOrders is available to a limited number of users. For more information, or to express your interest in using eOrders, please contact MedicalDirector Customer Care.

### eOrders provides you with:

- A secure mechanism for sending pathology and cytology requests electronically from MedicalDirector Clinical.
- A closed-loop solution whereby the results returned to you precisely match the requests sent to the laboratory i.e. no more confusion as to which results relate to which requests.
- A facility for viewing a list of pending orders and outstanding requests.

### Prerequisites for using eOrders:

- eOrders requires an active Internet connection.
- eOrders can only be accessed by Practitioners and Nurse Practitioners.
- eOrders is **not** supported on computers running Windows XP, or Windows Server 2003.

For detailed information search for “eOrders” in the Help.

1	Order by test name or condition	8	Clinical notes you can add, free-typed or via Progress Notes.
2	Order by specialty	9	Diabetic/Fasting/Pregnant indicators
3	Order cytology or histology tests	10	Include the patient's current Rx for reference
4	Order by doctor/patient favourites or most-frequent	11	Copy to Doctors
5	Prior eOrders including results	12	Billing options
6	Tests/Conditions to select from	13	Confidential/Urgent/Phone/Fax indicators
7	Tests requested	14	Request date and Print/Send (or Reprint)

## HealthLink Forms

Secure access to and submission of HealthLink forms is available directly from the new **HealthLink** tab in the patient's record. HealthLink form accessibility in MedicalDirector Clinical replaces current paper-based form systems, to significantly reduce costs and the time taken to obtain, complete, and submit forms.

- Subscribe and send third-party forms/templates through the HealthLink forms interface.
- Form templates are prepopulated with patient data from MedicalDirector Clinical, saving time for the practice.
- All HealthLink forms can be submitted electronically, or saved as a draft, and tracked as per-practice requirements for improved patient management.

## Obstetrics

- When ending a pregnancy, if you record a name and gender for the child, you will be prompted as to whether you want to create a patient record for that child in MedicalDirector Clinical.

## Patient Details

- **More Options for Recording a Patient's Gender.**

When recording your patient's gender, the options to select from now include 'Not Stated', 'Male', 'Female', and 'Intersex/Other'. These new options are also available to other components of MedicalDirector Clinical, such as the Letter Writer and Patient Search.

If not specified, a new patient's gender is determined automatically, depending on the Title you select for them, and is limited to male/female options. You can specify a gender manually by selecting an option from the Gender drop-down menu on the Pt Details tab of a patient's demographics.

The screenshot shows the 'Patient Details' form with the 'Personal Details' tab selected. The 'Gender' dropdown menu is open, showing options: 'Not Stated', 'Female', 'Male', and 'Intersex/Other'. A yellow box highlights the dropdown menu and the 'Transgender' checkbox, which is currently unchecked.

You can also specify that the patient is transgender, to indicate that if the patient has had or is undergoing transgender procedures. For example, a patient who was born 'male', who is currently undergoing transgender procedures, would be recorded as 'Female Transgender'.

This close-up screenshot shows the 'Gender' dropdown menu set to 'Female' and the 'Transgender' checkbox checked. A yellow box highlights the 'Female' selection and the checked 'Transgender' checkbox.

### How Gender Determines Clinical Scope:

A patient's gender definition determines the scope of content available to them within MedicalDirector Clinical;

- Male patients have access to shared features, as well as features exclusive to male patients.
- Female patients have access to shared features, as well as features exclusive to female patients.
- Gender-neutral patients have access to all content. A gender-neutral patient is one whose gender is defined as either 'Not Stated', 'Transgender Male', 'Transgender Female', or 'Intersex/Other'.

For more information about gender, search for 'Gender' in the Help.

- **Opt-out of receiving SMS**

If the patient opts to *not* receive SMS, you can flag this in the patient record, by ticking 'Do not send SMS'.

**Note for PracSoft sites:** This field is the same as the 'Do not send SMS', in the patient demographics.

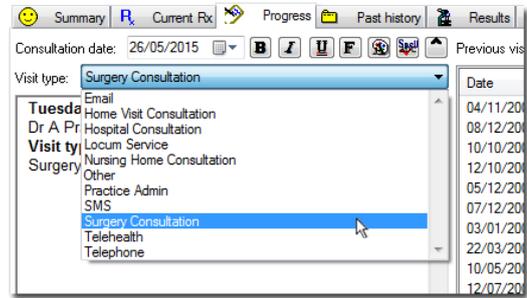
The screenshot shows the 'Default phone number to be displayed' form. The 'Mobile' radio button is selected. The 'Preferred Contact' dropdown is set to 'SMS', and the 'Do not send SMS' checkbox is checked. A yellow box highlights the 'Do not send SMS' checkbox.

## Prescribing

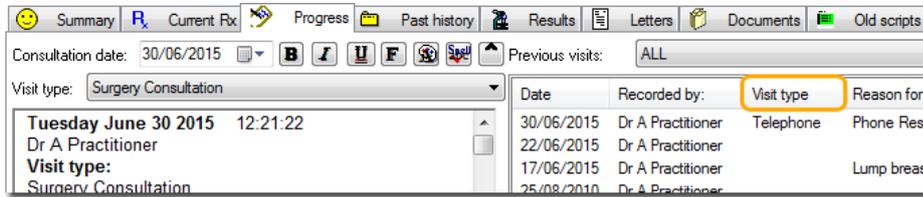
- A drug-pregnancy interaction check is now made when you re-prescribe a current medication (i.e. re-print a script via the CurrentRx tab of the patient’s record) or the current medications dose is altered.

## Progress Notes

- A **Visit Type** drop-down list has been added to the Progress tab of the patient’s record. From this list you can indicate the type of visit for the day’s consultation. The default visit type for practitioners is ‘Surgery Consultation’, and the default for all other users is 'Practice Admin'. You can add customised entries via the Lists tab of MedicalDirector Clinical Options.



Your selected Visit Type for each consultation is also displayed in the past Progress Notes.



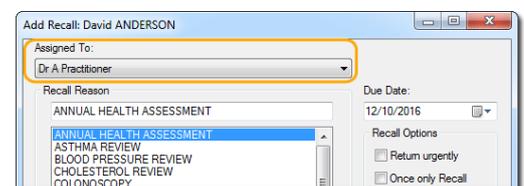
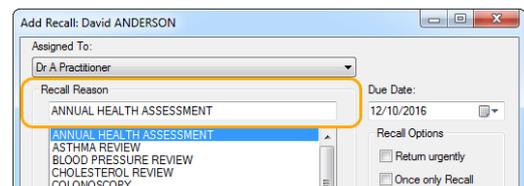
Upon closing the patient’s record, you will be prompted to confirm the visit type you have selected. This prompt can be disabled via the Progress Notes tab of MedicalDirector Clinical Options.

## Recalls and Reminders

- Redesigned Recall and Reminder system.
  - The revamped Recall and Reminder system allows users to save and set default search criteria, select multiple practitioners from the search criteria window, and save and export search results. Users can also easily filter and sort on any column within the Recall and reminder system, such as Recall reasons, statuses, contact, and so forth.
  - Any attempts to contact the patient are recorded and [searchable](#), allowing users to easily search and identify patients that need further follow-up.
  - For sites using MedicalDirector PracSoft in conjunction with MedicalDirector Clinical, appointments made against a Recall will be recorded and searchable from the Recalls module.

- When creating a recall, the default field in focus has been modified:
  - For practitioners, the **Recall Reason** field has focus, allowing you to immediately type a reason for the patient’s recall.

For other users, the **Assigned To** field has focus, allowing you to first select the practitioner you are creating the recall on behalf of.

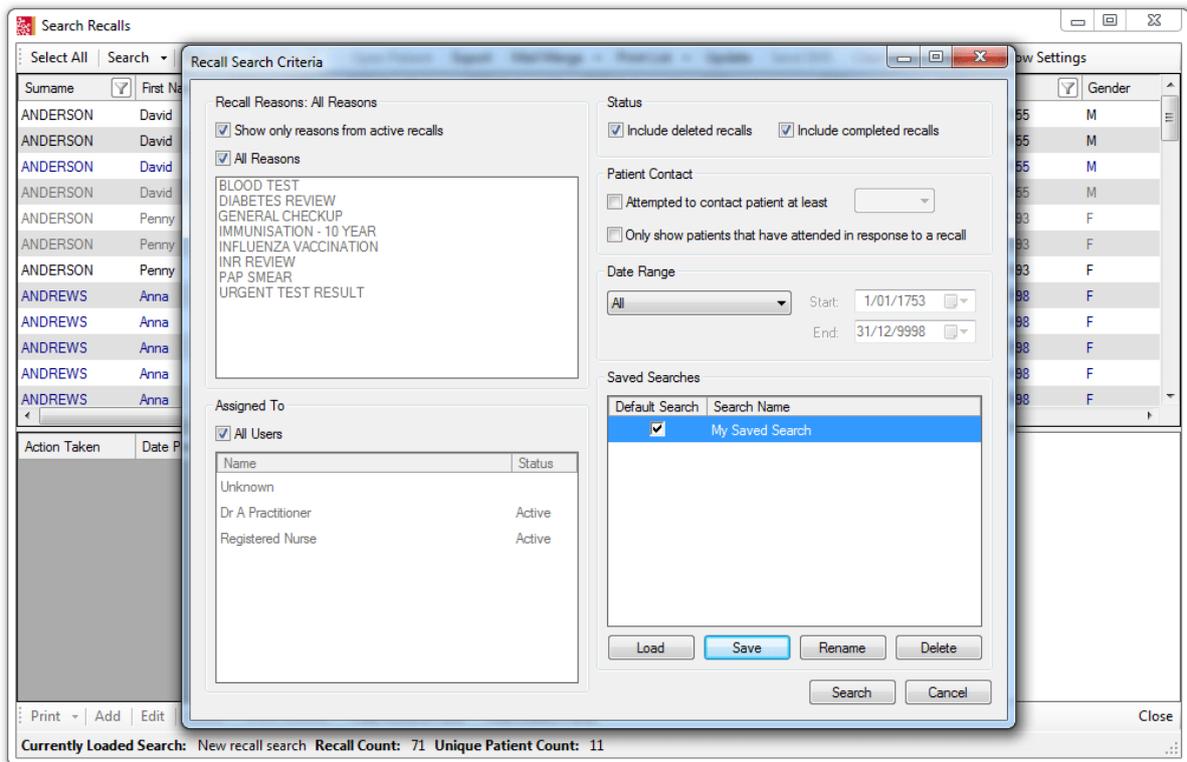


## Searches

- A patient's State of Residence is now displayed in the Address field of Patient Search results (Front screen > Search > Patient). Labels printed from the search results now also show the State, in compliance with Australia Post's 'Clean Mail' guidelines.
- **New Recall Search.**

The Recall search module (Search > Recall...) has been redesigned. New features include:

- Quick-filter the search criteria to show reasons from active Recalls only
- List only patients where an attempt to contact them has been made
- List only patients that have attended in response to a Recall
- Save your favourite Recall searches
- Sophisticated filtering of search results
- Search results can be exported to a file
- [SMS](#) recall notifications can be sent to patients directly from the search results



## Sidebar

- You can now click anywhere on a minimised Sidebar to expand it.

## User Database

- User-defined Categories are available from the Add/Edit User window (User > Setup Users). Click  to manage.



## Content for MedicalDirector PracSoft

### Accounts

- The accounts 'print preview' window now allows you to print to printers other than the default.
- Safety Net reports can now be printed from a patient's record.

### Appointments

- Patients in the Appointment Book can now be flagged as 'no-show' by right-clicking their appointment slot and selecting "No Show" from the menu that appears. Appointments flagged in this way are displayed in orange. A [No Show report](#) is also available.

:45		
9:00 AM	BAKER, STEPHEN	ANDREWS, JENNIFER
:15	ANDREWS, Jennifer	
:30	STRUTHERS, DALTON	FORTHE, S
:45		

- **Track Attendance Against a Recall**

If you are using MedicalDirector Clinical in conjunction with MedicalDirector PracSoft, and the patient you are scheduling an appointment for has any due Recalls, the following window will appear. Indicate which Recall(s) the patient is scheduling an appointment for. This information is saved back to the patient's record in MedicalDirector Clinical.

*Note that the **Reasons** column in this window is visible only to users who have been given permission to view it. This permission is granted via the **Show Recall Reasons** check box on the [User Details](#) window*

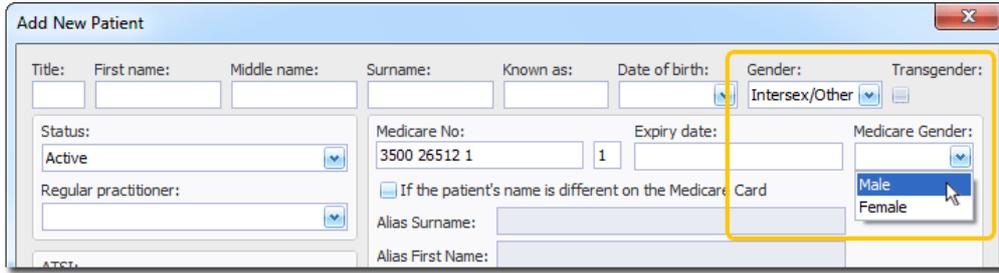
	Reason	Date Due	Assigned To	Last Reminder	Booked Appointment
<input checked="" type="checkbox"/>	PAP SMEAR	16/06/2017	Dr A Practitioner		
<input checked="" type="checkbox"/>	ANNUAL HEALTH ASSESSMENT	16/06/2016	Dr A Practitioner		
<input type="checkbox"/>	PNEUMONIA VACCINATION	11/06/2016	Dr A Practitioner		

### Patient Details

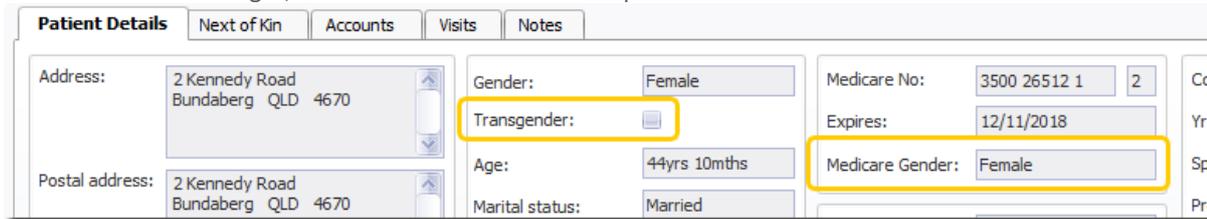
- **More Options for Recording a Patient's Gender.** When recording your patient's gender, the options to select from now include 'Not Stated', 'Male', 'Female', and 'Intersex/Other'. Also, you can now indicate whether the patient is transgender.

- **Record a Patient’s ‘Medicare’ Gender.** For patients whose gender is recorded in *MedicalDirector PracSoft* as ‘Intersex/Other’, you can now also indicate what their gender is, as recorded on their *Medicare Card*.

This feature is available to patients with a recorded gender of ‘Not Stated’ or ‘Intersex/Other’, and if the ‘Transgender’ check box is ticked.



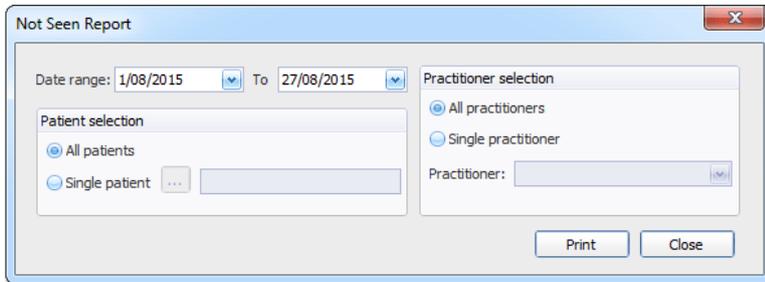
In line with these changes, the **Patient Details** tab of the patient’s record has been modified:



## Reports

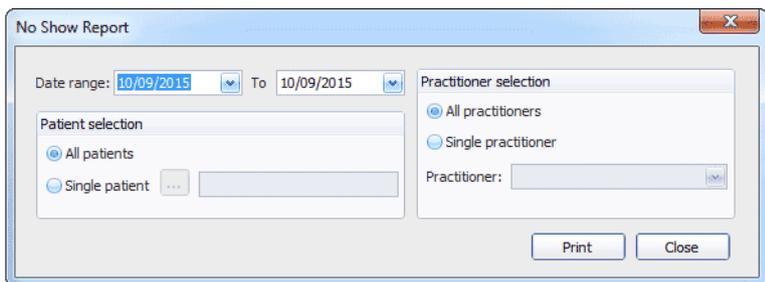
- A new report of patients ‘Not Seen’ is available from the Reports menu in the Waiting Room.

A patient ‘not seen’ is defined as one who arrived at the practice, was added to the Waiting Room, but who subsequently left before going into consultation. These patients can be flagged as ‘not seen’ when you [remove them from the Waiting Room](#).



- A new report of ‘No-Show’ patients is available from the Print menu in the Appointment Book.

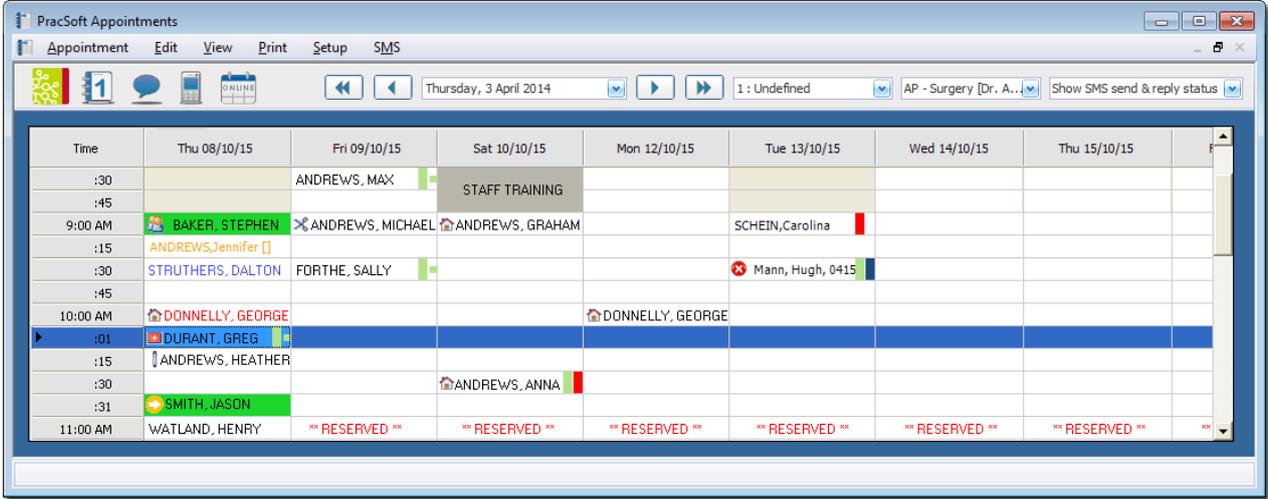
A ‘no show’ patient is defined as one who scheduled an appointment, but who didn’t arrive at the practice for their appointment. Patients can be flagged as such by right-clicking their appointment, and selecting ‘No Show’ from the menu that appears. A patient flagged in this way does not have their appointment removed from the Appointment Book – it is simply *flagged* as ‘no show’.



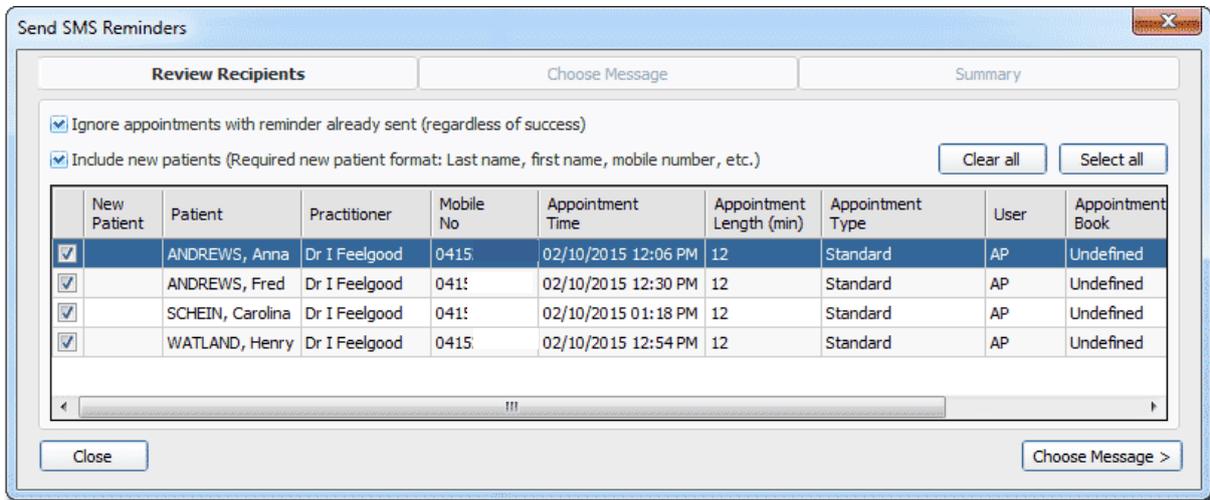
## SMS Reminders

The SMS messaging system has been redesigned to provide you with an intuitive, simple system for creating and sending SMS messages to patients. Some of the new features are described below. *Detailed instructions are available in the online Help (press **F1**, and search for “SMS Reminders”).*

- **SMS status icons in the Appointment book.** The Appointment Book now shows the status of any messages sent, and any replies received, for each appointment.



- **Appointment reminders longer than a standard SMS can now be sent.**
- **Patients can opt-out of receiving SMS messages** (provided replies are enabled).
- **New patients can be sent SMS reminders, provided they're entered into the Appointment Book with the format of 'Surname, First Name, Mobile Number, ...'.**
- **Multiple appointment reminders can be sent directly from the Appointment Book**



Simply drag your mouse to select multiple records in the appointment book and then press  or select Appointment > Send SMS Reminders...



○ **New Merge Fields**

- Appointment Day (e.g. Monday, Tuesday...)
- Appointment Day (short) (e.g. Mon, Tue...)

○ **Patients of any appointment book practitioner can be sent appointment reminders, regardless of whether the appointment book practitioner is also a billing practitioner.**

Previously this feature was restricted to practitioners who were registered in MedicalDirector PracSoft itself. This feature is enabled for a given practitioner via the **Practitioner Details** window (**Appointment Book > Setup > Practitioners**, select the practitioner > click **Add** > tick the **Send Scheduled SMS Reminders** check box).

○ **Patients can now reply to SMS reminder messages.**

When composing a message you can now indicate whether the patient will be able to send a reply response i.e. if you wish to request that they reply to your message in order to confirm their attendance at the appointment.

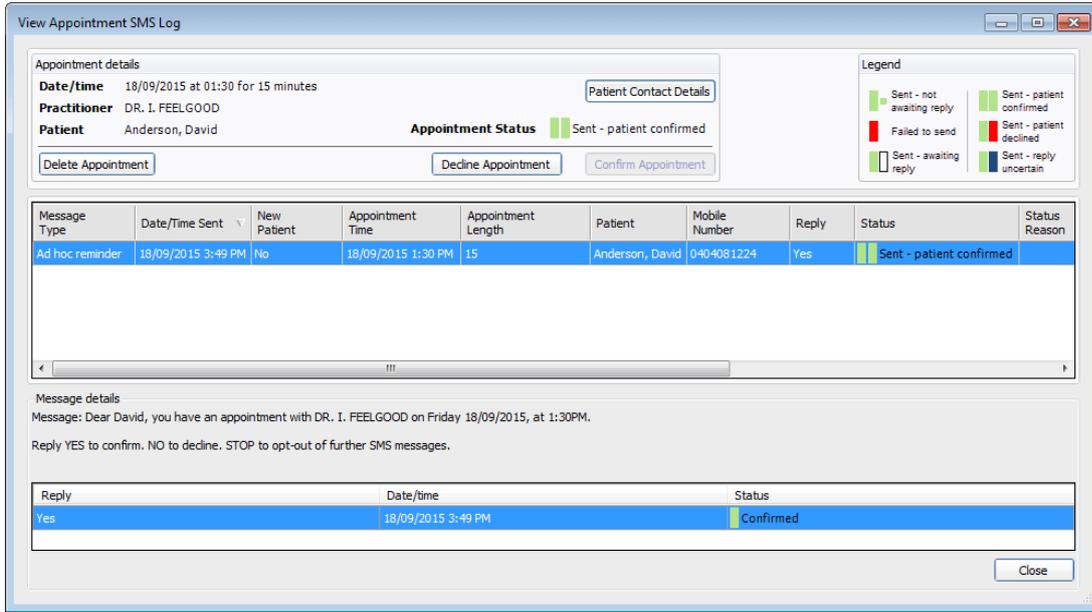
- If you elect that patients **cannot** reply, you can enter a description for the SMS sender e.g. "OurPractice"
- If you elect that patients **can** reply, it is recommended that you indicate this in the message body, providing instructions e.g. "Reply **YES** to confirm. **NO** to decline. **STOP** to opt-out of further SMS messages."

○ **Preview messages before sending them.**

A new **Summary** screen presents you with a preview of the message to be sent, along with information about the number of text characters used in the message, the number of messages to be sent, and the estimated cost in SMS credits.

○ **SMS Logs.**

An audit trail of appointment reminders to, and replies from, patients is provided via new SMS logs. View SMS messages sent for each patient, for each appointment, and a practice-wide view of all messages sent and received.



- **Appointment SMS Log:** Right-click > View Appointment SMS Log or Appointment > View Appointment SMS Log.
- **SMS Audit Log:** SMS > View SMS Audit Log
- **Patient SMS Log:** PracSoft > Patient Details > Patient SMS Log button

○ **The Status of SMS Reminders is Displayed in the Appointment Book** \*refer to [image](#) above

Status	Description
	A message has been sent, and you are not waiting on a reply*.
	A message has been sent, and you are waiting on a reply*.
	A message has been sent, and the patient has replied* indicating that they have declined the appointment.
	The message failed to send.
	A message has been sent, and the patient has replied* indicating that they have accepted the appointment.
	A message has been sent, and the patient has replied*, but their reply message is deemed 'uncertain'.

## User Details

A 'Show Recall Reasons' check box has been added to the User Details window (Admin > User List > Edit User). Ticking this box grants the user permission to view reasons for a patient's recall when the patient is added to the Waiting Room, or when an appointment is scheduled for them.

See related content;

- [Track attendance against a recall](#) (Appointment Book)
- [Track attendance against a recall](#) (Waiting Room)

## Waiting Room

- When removing a patient from the Waiting Room, you can now flag them as not seen. Patients flagged in this way are added to a new 'Not Seen' [Report](#).

- **Track Attendance Against a Recall**

If you are using MedicalDirector Clinical in conjunction with MedicalDirector PracSoft, and the patient you are adding to the Waiting Room has any due Recalls, the following window will appear. From here, indicate which Recall(s) the patient is in attendance for. This information is saved back to the patient's record in MedicalDirector Clinical.

*Note that the **Reasons** column in this window is visible only to users who have been given permission to view it. This permission is granted via the **Show Recall Reasons** check box on the [User Details](#) window*

	Reason	Date Due	Assigned To	Last Reminder	Booked Appointment
<input checked="" type="checkbox"/>	PAP SMEAR	16/06/2017	Dr A Practitioner		
<input checked="" type="checkbox"/>	ANNUAL HEALTH ASSESSMENT	16/06/2016	Dr A Practitioner		



## Shared Content and MedicalDirector Maintenance

### Link File Processor

The Link File Processor utility is often used with MedicalDirector Clinical in conjunction with a third-party Front Desk application for continuous demographic synchronisation.

The Link File Processor now runs as a Windows Service. As such, it is no longer necessary to have a user logged in to Windows for it to be active – you can simply configure it to start with Windows, and it will run in the background upon start-up.

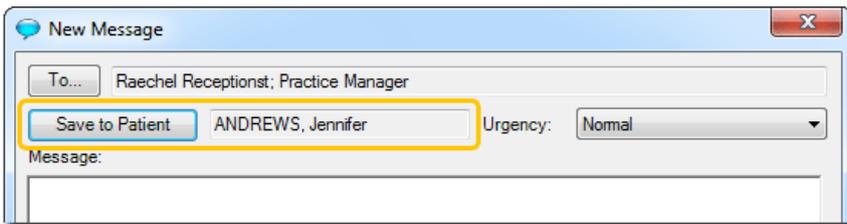
The Link File Processor Service is still configurable via MedicalDirector Maintenance, through the new **LFP Service Manager** utility, and *must* be configured when you first initialise it. If the surgery has been using the Link File Processor, applying the DVD Update will automatically configure the new LFP Service with the current settings.

Once the Service has been configured, and is active, it can be disabled/enabled and reconfigured via the  icon in the Windows System Tray.

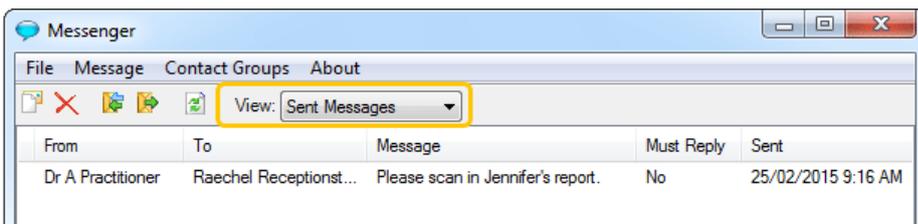
*For detailed information about the LFP Service Manager, press F1 whilst in MedicalDirector Maintenance, and search for 'Link File Processor'.*

### Messenger

- Messages can now be saved to patient records. Messages saved this way are saved to the patient's Correspondence tab, with a document type of 'MD Messenger Record'.



- Sent messages are now saved, accessible via the View drop-down list.



- Create groups of recipients, and then send a message to the whole group. Groups are displayed in **bold**.

