



Medical Director / PracSoft 3.14 Release Notes

The following information outlines the enhancements, modifications and fixes contained in the Medical Director / PracSoft 3.14 update CD, released September 2012. This information is also available for download as a PDF from the HCN Knowledge Base at www.hcn.com.au/kb.

The 3.14 release is a *full update*, and can be installed over 3.11 or higher.



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Medical Director and PracSoft Licensing

The 3.14 update of Medical Director / PracSoft introduces the following changes to Licence management:

- Medical Director and PracSoft now have separate licence keys, to support different numbers of users per product, and different product expiration dates.
- You will receive separate licence keys for Medical Director and/or PracSoft when you next renew your current subscription. Once you receive the keys, you will be required to enter, validate, and save them. This can be done via the Licence Details utility within HCN Maintenance. *You do not need to make any changes until you renew your licence(s), and receive your new key(s).*
- When entering the new licence key for either product, it must be validated and then saved. Buttons are provided in the Licence Details utility for doing this. Where you use both Medical Director *and* PracSoft, you *must* perform this licence registration process *for both licence keys*. See **Licence Details** within the HCN Maintenance Help for instructions.
- When you renew your subscription(s), a set of instructions will be sent with the Licence key(s), explaining the exact steps for entering the keys.
- If you use both Medical Director and PracSoft, when inactivating/activating a prescriber in one application, you will be prompted as to whether you wish to inactivate/activate them in the other application.

3.14 Content for Medical Director

Improved Management of Incoming and Outgoing Correspondence

Medical Director 3.14 provides different means for handling Incoming Correspondence according to the following scenarios:

Scenario 1: Scan/import correspondence that requires checking by a practitioner before storing to a patient's record.


- **Scan/Import Correspondence window (new):** The Scan/Import Correspondence window is accessible by *all* users, including Doctors, Nurse Practitioners and other Users with Full, Limited and Basic-level security access. All correspondence scanned/imported via this window will flow through to the Holding File, where the assigned practitioner can then check and action it accordingly, before storing it to a patient's record.
- **Holding File window (improved user interface and features):** Only specific user-types* can access this window in order to scan/import correspondence. The assigned practitioner is then required to check and action correspondence, before storing it to a patient's record. **Search for 'Holding File' in the Medical Director Help*

Scenario 2: Scan/import correspondence, immediately storing it to a patient's record.

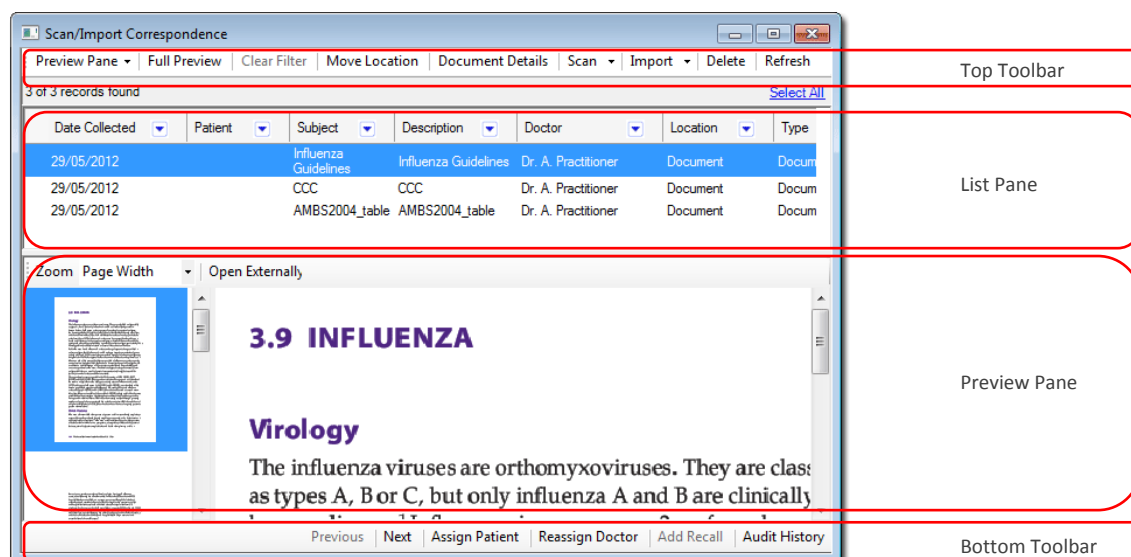
- **Investigation Results (improved user interface and features):** Only specific user-types* can access this window in order to scan/import correspondence, which is then immediately stored to the selected patient's record. **Search for 'Managing Previous Results for All Patients' in the Medical Director Help*
- **Patient Clinical Record tabs such as:**
 - Results (improved user interface and features)
 - Letters (improved user interface and features)
 - Documents (improved user interface and features)
 - Correspondence (new - contains all types of correspondence such as Results, Letters, and Documents)

During the patient's consultation, the practitioner can immediately scan/import correspondence via any of the tabs listed above, within the Clinical Window.

Improved Correspondence Feature Set

- **Preview Pane:** Split-screen showing a preview of the selected record.
- **Column Filtering/Sorting:** Filter records by date, text, and exact matching criteria using the  button. Sort the order of records by clicking any column title.
- **Move Location:** Move correspondence between the Results, Letters, and Documents tabs in the Clinical Window, or the ECG tab in the Tool Box.
- **Scan:** Activates the improved Scan Document window.
- **Import:** Import a variety of document types.
- **Document Details:** Assign/reassign correspondence to patients/doctors. Delete the source of imported files.
- **Print List:** Prints a list of pre-selected documents.
- **Delete:** Deletes a set of selected documents.
- **Search:** Search the list of records for specific text.
- **Assign/Reassign Patient:** Allocate selected correspondence to a patient's file or reassign it to another patient.
- **Assign/Reassign Doctor:** Allocate selected correspondence to another doctor or reassign it to another doctor.
- **Notified/De-notified:** Indicate that the patient was notified about the selected document.
- **Add Recall:** Create a Recall notification for the patient.
- **Print:** Prints the current record.
- **Audit History:** Displays an audit trail of changes made to a selected correspondence.

Overview of the new Window Layout for Correspondence



Please note that access to these features depends on the security access level of the logged-in user in Medical Director. See the Medical Director Help for further information. Note also that if you had previously saved the column order within either of the Holding File or Investigation Results windows, or within any of the Results, Letters, or Documents tabs, these will be reset upon upgrading to MD/PS 3.14. You will still be able to rearrange the columns on these windows to your liking, by clicking and dragging them into position.

Availability of Buttons/Functions

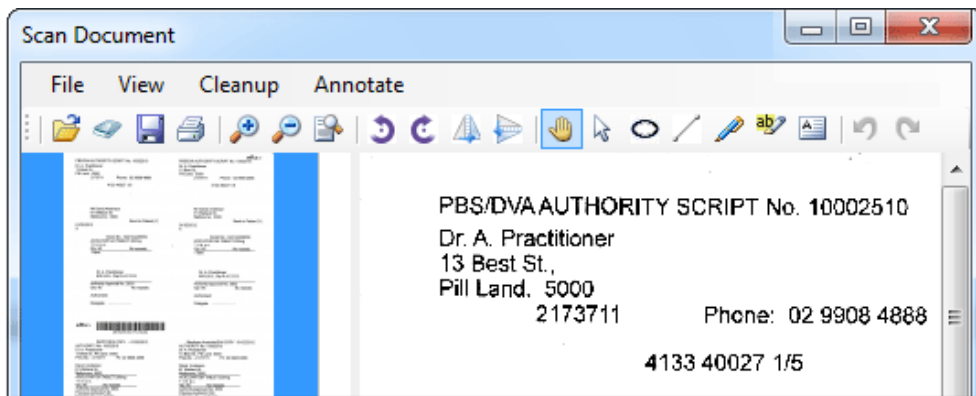
	Medical Director Window/Tab						
	Scan/Import	Holding File	Investigation Results	Results Tab	Letters Tab	Documents Tab	Correspondence Tab
Preview	✓	✓	✓	✓	✓	✓	✓
Filtering/Sorting	✓	✓	✓	✓	✓	✓	✓
Column Ordering	✓	✓	✓	✓	✓	✓	✓
Move Location	✓	✓	✓	✓	✓	✓	✓
Document Details	✓	✓	✓	✓	✓	✓	✓
Scan	✓	✓	✓	✓	✓	✓	✓
Import	✓	✓	✓	✓	✓	✓	✓
Print List	✗	✓	✓	✗	✗	✗	✗
Delete	✓	✓	✓	✓	✓	✓	✓
Search	✗	✗	✗	✓	✓	✓	✓
Assign/ Reassign Patient	✓	✓	✓	✓	✓	✓	✓
Assign/ Reassign Doctor	✓	✓	✓	✗	✗	✗	✗
Notified	✗	✗	✓	✓	✓	✓	✓
Add Recall	✓	✓	✓	✓	✓	✓	✓
Print	✗	✓	✓	✓	✓	✓	✓
Audit History	✓	✓	✓	✓	✓	✓	✓

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New Scan Document Window:

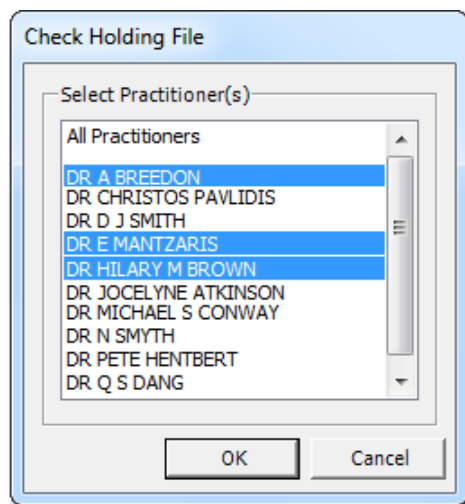
- Medical Director now provides a sophisticated scanning facility that allows you to scan and edit documents directly into the Holding File, the Investigation Results window, the Scan/Import Correspondence window, or either of the Results, Documents or Letters tabs of the patient's record. Scanning/Importing is also now available to all users (including those with basic/limited access to Medical Director) via File > Scan/Import Correspondence.
- Via the new Scan Document window, you can scan or import documents, and then rotate them, flip them, add annotations with the text box tool, or draw on them with the ellipse, pen, line, or highlighter tools. There are also tools for improving the appearance of scanned documents, including de-skew and de-speckle.

As it is now possible to scan and import directly into Medical Director, the Document Holding Bay (found within the HCN Maintenance suite) is redundant, and has been removed.



Holding File

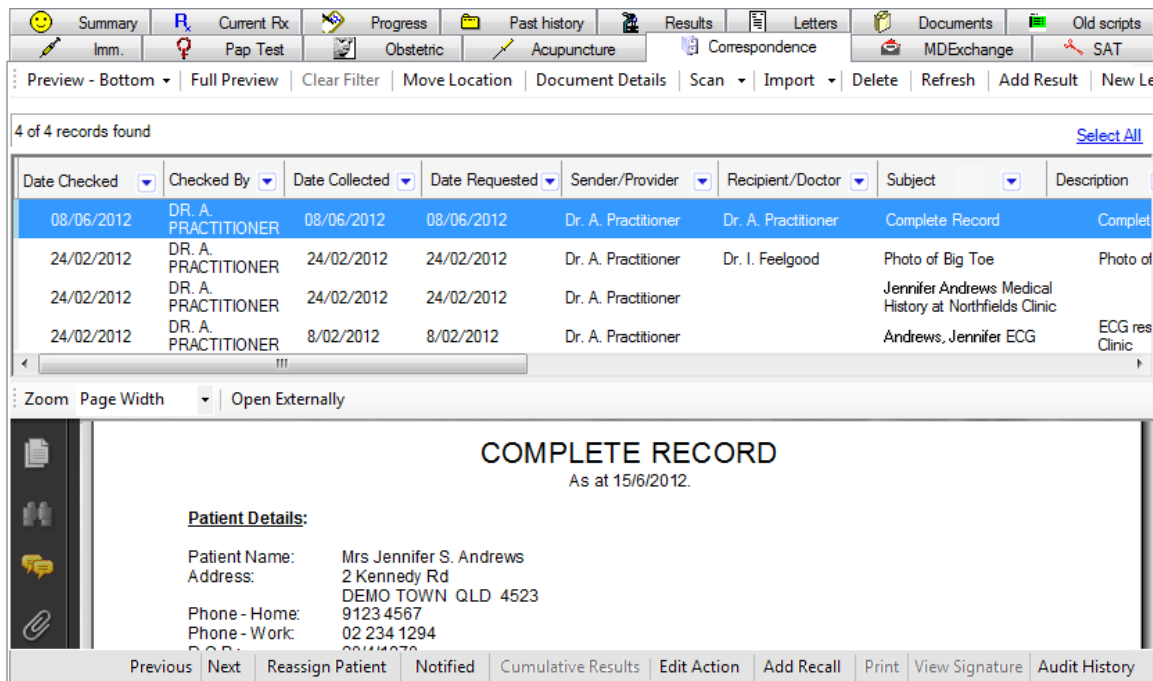
- The 'Check Holding File' window has been enhanced:
 - Window size has been increased to display 20 entries by default.



- Practitioner names are sorted alphabetically, but will always retain 'All Practitioners' on top of the list.
- Select multiple practitioners with the click of a mouse (no keyboard required). Alternatively you can select 'All Practitioners' located at the top of the list.
- Report header is re-formatted when printing a result.
- More message formats are now supported, including Pathology/Radiology PDF results, eHealth Clinical Document Architecture (CDA) for Discharge Summaries, Specialist Letters, eReferrals, Shared Health Summaries and Event Summaries.

Clinical Window:

- A new *Correspondence* tab has been added to the Clinical Window. This tab displays the combined records from each of the Results, Documents and Letters tabs. From this tab you can also scan or import documentation, record new Investigations Results and compose new letters and similar correspondence using the Letter Writer.
- To differentiate between the incoming and outgoing letters from the Letters or Correspondence tabs, use the 'Source' column filter. Sources for incoming letters include 'Scanned', 'Imported' and 'SDI', with the outgoing source option being 'Application'.



The screenshot shows the Medical Director Clinical Window with the 'Correspondence' tab selected. The window displays a table of correspondence records and a detailed view of a 'COMPLETE RECORD' for Mrs Jennifer S. Andrews.

Date Checked	Checked By	Date Collected	Date Requested	Sender/Provider	Recipient/Doctor	Subject	Description
08/06/2012	DR. A. PRACTITIONER	08/06/2012	08/06/2012	Dr. A. Practitioner	Dr. A. Practitioner	Complete Record	Comple
24/02/2012	DR. A. PRACTITIONER	24/02/2012	24/02/2012	Dr. A. Practitioner	Dr. I. Feelgood	Photo of Big Toe	Photo of
24/02/2012	DR. A. PRACTITIONER	24/02/2012	24/02/2012	Dr. A. Practitioner		Jennifer Andrews Medical History at Northfields Clinic	
24/02/2012	DR. A. PRACTITIONER	8/02/2012	8/02/2012	Dr. A. Practitioner		Andrews, Jennifer ECG	ECG res Clinic

The detailed view shows the following patient details:

Patient Details:
 Patient Name: Mrs Jennifer S. Andrews
 Address: 2 Kennedy Rd, DEMO TOWN QLD 4523
 Phone - Home: 9123 4567
 Phone - Work: 02 234 1294
 D.O.B.: 02/11/1970

By default the following tabs are displayed: Results, Letters, Documents and Correspondence. You can choose to show/hide tabs via Tools > Options > Clinical Tab, from the Medical Director main screen. Detailed information about these enhancements is available from the Medical Director Help.

Devices

- Medical Director now supports the Easy-On PC Spirometer.
- Medical Director can now open legacy CardioView ECG scans in Office Medic.

eHealth

New Supported CDA Documents

Clinical Document Architecture (CDA) is an XML-based mark-up standard for specifying the encoding, structure and semantics of clinical documents for exchange. Medical Director now accepts CDA-based documentation.

- CDA-based Specialist Letters, e-Referrals, Shared Health Summaries and Event Summaries can now be sent from Medical Director.
- CDA-based Discharge Summaries, Specialist Letters, e-Referrals, Shared Health Summaries and Event Summaries can now be imported to Medical Director.

Introducing SMD capability within Medical Director

- Medical Director is now certified as Secure Message Delivery (SMD) compliant by NEHTA.



- Using Healthcare Provider Identifier-Organization (HPI-O) CDA documents can be securely sent to another system/user using the CDA standard. Note that practices need to be registered and have received an HPI-O to use this functionality.
- Any CDA document can be sent via either MD Exchange, SMD or third-party transport.

Changes to Medical Director

- The Holding File accepts CDA-based correspondence for Discharge Summaries, Specialist letters, e-Referrals, Shared Health Summaries and Even Summaries, imported along with 'standard' Investigation Results.
- Under Manage Communications a new tab labelled 'Message Tracking' has been introduced to track the Acknowledgments for the messages sent via SMD.
- The Letters tab within the Clinical Window has been modified to accept CDA-based correspondence.
- Letter writer has been modified to facilitate the creation of CDA documents. A new e-Health tab has been added to the letter writer which contains four new CDA correspondence templates.

HCN Maintenance

- Document Holding Bay

With the improved management of incoming correspondence, the Document Holding Bay has become redundant, and has been **removed** from HCN Maintenance.

Existing scanned or imported correspondence in the Document Holding Bay will be available after the upgrade to 3.14, via the following windows:

- Scan/Import Correspondence Window
 - Holding File
- Within the Configuration utility, information previously located on the ManageEzy tab has been moved to the Configuration tab, and the ManageEzy tab has been removed.

Letter Writer

- New templates are available for creating CDA compliant correspondence for eReferrals, Specialist Letters, Shared Health Summaries and Event Summaries.

Clinical Document Architecture (CDA) is an XML-based markup standard for specifying the encoding, structure and semantics of clinical documents for exchange. CDA-based documents are saved to the Letters Tab of a patient's clinical record.

Prescribing

- The text 'eRx' has been added to the top right-hand corner of printed prescriptions to indicate if they have been generated using the ePrescribing function in Medical Director.

Searches


- When printing the results of a diabetes search (Search > Diabetes Register), you can now print from the following options:
 - *Patient Summary*: Prints only the patient demographics and chart/Medicare number.
 - *Full Report*: Prints everything displayed on the diabetes register window (all the clinical details).

3.14 Content for PracSoft

Accounts and Receipts

- A new 'Fee GST Incl' column appears on the Record Visit window for those practitioners who have selected to add GST to their list of default billing item numbers and fees.

NOTE: To enable GST for Registered Practitioners, follow the setup provided in the Help file topic (*search for 'Registering a Practitioner to use GST'*) before billing.

- The Fee column on the Record Visit window now includes GST, calculated automatically.
- Updated Multiple Scaling rule in line with Medicare. A new 'MBS Rate' column appears on the Record Visit window when you add service items bound by multiple scaling.
- The Held Account icon () is now removed from the Waiting Room for a given patient, upon releasing the account.
- You can now print multiple copies of a held account.
- When adjusting column widths on the Accounts tab of a patient's record, the settings are now retained.
- The 'Amount' field on the Record Visit window has been widened to accommodate larger values.
- Cheque drawer details for Institutional Payers will now be retained for the next invoice. Note: If receipt payments consist of multiple cheques, only the last cheque's information is retained.
- The length of the patient's Name field on printed invoices has been expanded.
- On claim reports, service text now displays in order of Standard text, Explanation text, Additional text.
- A '*' denoting In-Hospital services now appears on In-Hospital Accounts and Receipts.

Appointments

- When printing an appointment list for a practitioner, all appointment slots will be printed.
- When reopening the Appointment Book in 'Week' View, the last doctor selected is retained.
- The Appointment Reminder text box in a patient's record has been restricted to 255 characters.
- Email reminder messages will now appear in your email software's default 'sent' folder (e.g. Outlook 2003 default is Output Folder, Outlook 2010 default is Sent folder).
- The details of *who* placed an appointment and *when* are no longer altered when you change the patient's status to 'Waiting'.
- You can now setup recurring appointments for practitioners who only have 'special' sessions.
- You can now remove data from an appointment slot via right-click > cut.
- When setting the Appointment Book's default First and Last time slots (via Options), you can now use the up/down arrows to adjust minutes.

Easyclaim

- For Easyclaim transactions, visits are now recorded at the beginning of the transaction in order to minimise the chance of a time-out.

Fees

- GST for user-defined fees is now calculated automatically:
 - When a practitioner is GST-registered and GST applies for the selected service item.
 - When recording a visit, if you wish to alter the fee charged for a given item, manually change the fee to the total you wish to charge. The GST is calculated automatically.
- A 'GST Not Applicable' column added to the Fee Listing window. Exempt a fee from GST by ticking its checkbox.
- As PracSoft now calculates GST automatically, Fees in the Fee Listing window will be automatically adjusted to indicate GST applicable status.
- A new 'Fee GST Incl' column appears on the Record Visit window for those practitioners who have selected to add GST to their list of default billing item numbers and fees.
- The Fee column on the Record Visit window now includes GST, calculated automatically.
- GST-applicable status and GST rate of the practitioner are configured in the Practitioner Details window to indicate whether a practitioner adds GST to their list of default billing item numbers and fees. *See 'Registering a Practitioner to use GST' in the PracSoft Help for instructions.*
- 'Fee' column in the 'Record Visit' screen is now rounded to nearest 5c.
- When recording a visit for GST-applicable service item, the 'Tax Rate' column value (if available) in the Fee listing window will override the GST rate defined in the Practitioner Details window.

General

- Changes made to the 'Print chart number on assignment form' setting in Global Settings are now saved.
- Users with a Security Level of 7 or less can now change their own password.
- The 'Auto Capitalise' setting found on the *Add New Patient* and *Edit Patient Details* windows is now retained upon clicking the Save button.
- Flagging a User as 'inactive' now also flags their Practitioner record (if they have one) as 'inactive'.
- Logical tab-key progression through the Practitioner Details screen has been implemented.
- The Practitioner Type field on the Practitioner Details window has been changed to a drop-down list of occupations to select from. Note that DVA Allied Health Workers must select a valid DVA Allied Health occupation from this list. Other users can also free-type a new entry into this field.
- Commonwealth Seniors Concession Card now available as a Concession type.
- The Address Book Postcode list has been updated.

Linking

- PracSoft now allows for VISITS.OUT files exported from third-party clinical packages, where the file contains blank values (i.e. Medicare No).

Medicare Online Patient Claiming

- The 'Print to File' checkbox setting under Processing > Online Claiming > View is retained on closing the window.
- When editing a visit and altering the item number, the Description and Fee are automatically adjusted.
- Added '510 – Service paid as item 52-96/or similar item.' payment reason code as provided by Medicare.
- All exceptions now appear in the Resolve Exceptions window.
- Claim Reports will now be sent to the printer selected via Processing > Online Claiming > Setup > Printer Setup.
- Online Claiming for DVA is now available for Allied Health Practitioners. *See the topics 'Adding Service Item Text when Recording a Visit' and 'Practitioner Details' in the PracSoft Help for more information.*

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Reports

- The Banking Summary report Header and Total sections are now adjustable, to allow multiple lines for the bank account description.
- Re-printed Banking Summaries now show the date at which the banking was processed.
- Statement Report is now sorted by patient Surname, Firstname
- When generating a Demographics report, you can now specify 'Commonwealth Seniors Concession Card' as the concession criteria.
- When printing an Institutional Fees report, you can now select to display data from a specific Institution.
- The date field on the 'Summary Receipts by Institution' report has been expanded to display the full date.
- When printing Institutional Statements, you can now indicate a minimum dollar amount to display.
- Daysheet totals are now included on CSV-formatted exports.
- The status of the 'No from Date' check box (either ticked or un-ticked) for Arrears Reports is now saved.

Searches

- When searching for patients to add to the Waiting Room or Appointment Book, the first patient in list is now selected, and you can easily scroll through the list using the arrow keys.

SMS

- SMS Messaging now accepts practitioner names that contain an apostrophe.

Waiting Room

- When editing a referral, the original referral request date is retained.
- You will now be prompted when you attempt to invoice where there are no active practitioners in the database.
- A double-click is now required to edit fields in the Waiting Room. After you have entered/selected data, press the Enter key to commit.

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