Importing Correspondence

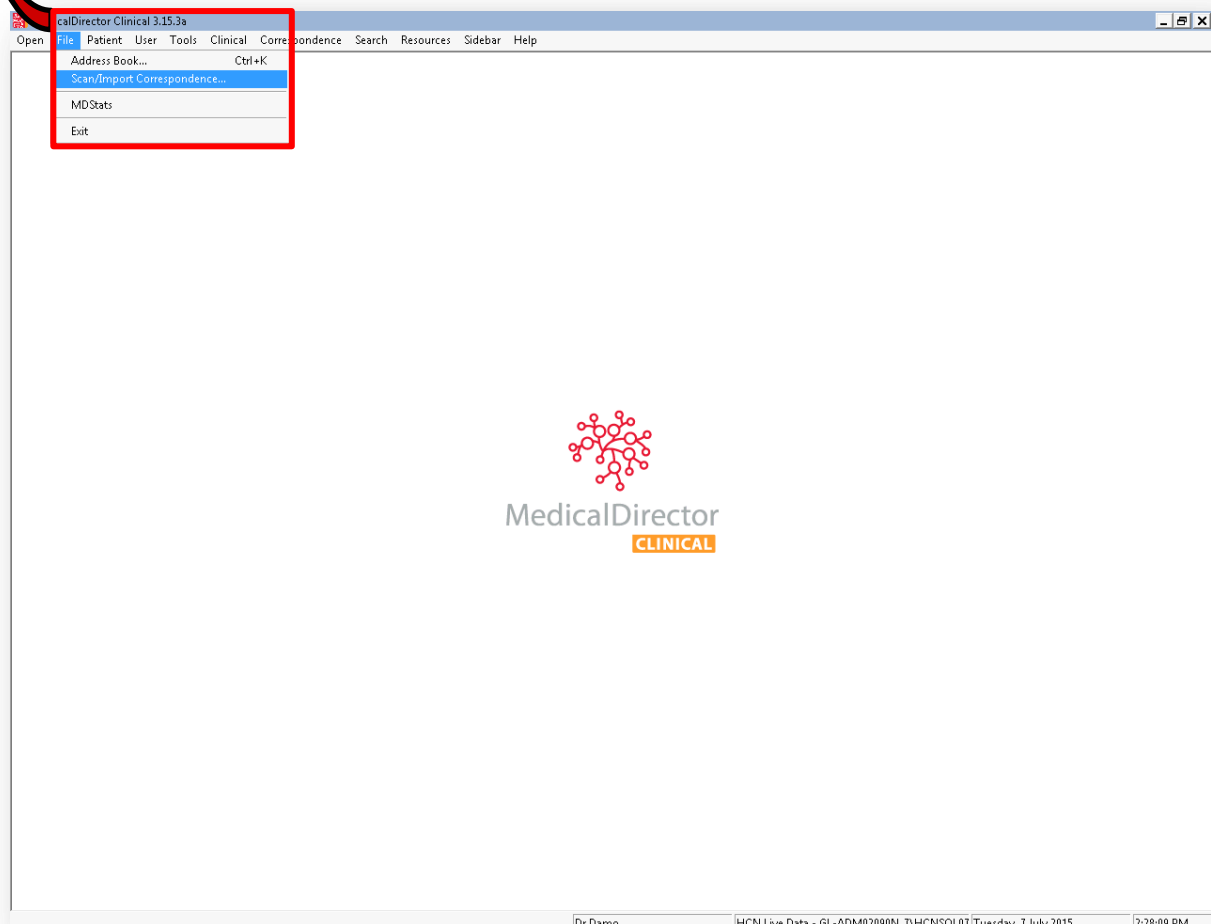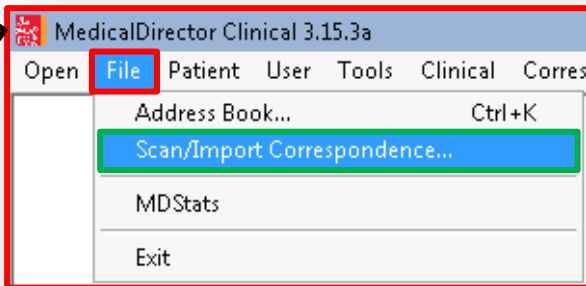*IT@RAMS*
Galambila, Durri, Biripi & Tobwabba

Importing Correspondence for Reception / Admin

This guide is for Reception & Admin staffs who import external clinic correspondence into our clinical software, Medical Director Clinical (MDC).

1. From the MDC home, select File then import/scan correspondence.

Importing Correspondence

2. This opens the Scan/Import Correspondence window. This is where correspondence is imported and listed before being sent to a patient file or the holding file, where GP's can review and action the correspondence. Below is the upper portion of the screen where correspondence is listed plus where the upper button set and document fields are located. (Document fields can be sorted and filtered, please see Filtering correspondence guide for detailed information here).

Importing Correspondence

The bottom portion of the screen is (by default) the preview pane. This is where you can view imported correspondence and access the lower button set.
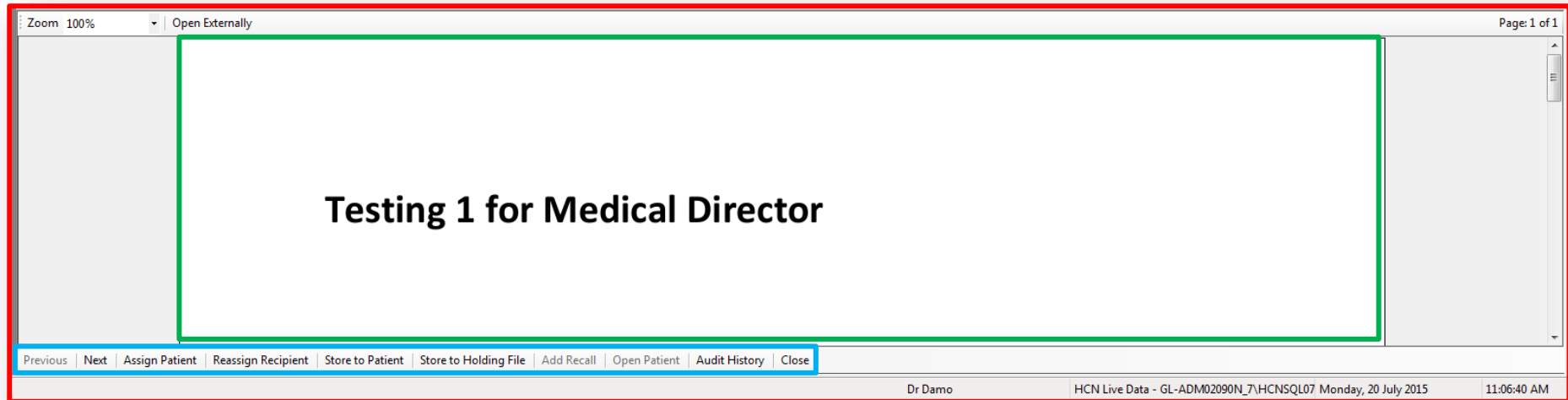
Importing Correspondence

Importing bulk patient files

1. Select Import from the upper button set. This will bring up the Open window to select the required files.

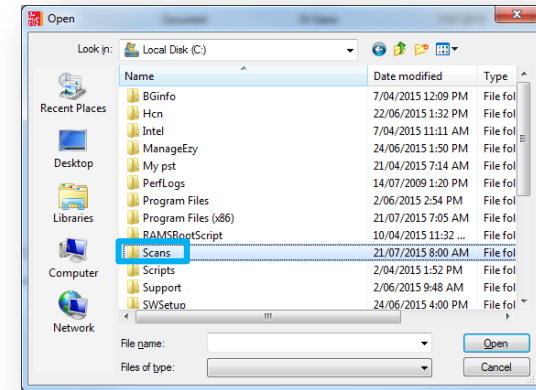# Importing Correspondence

2. From the Open window, select computer, select Local Disk (C:) from the list box, then Scans.
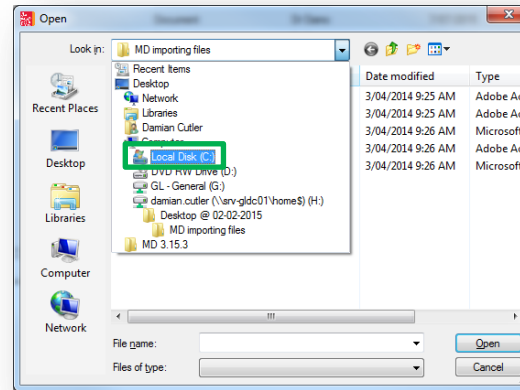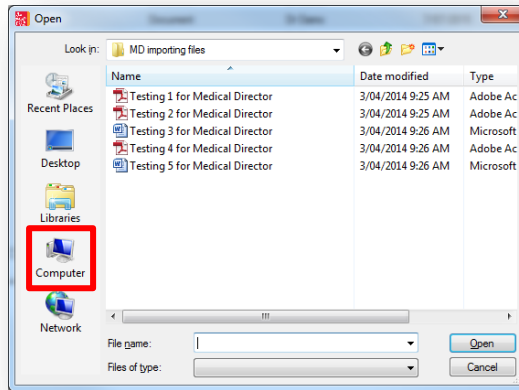
Note: Directory where scans are stored may vary from site to site.

Importing Correspondence

3. Select the required files by holding your left mouse button and dragging over the files then releasing the button to select. Click Open to import.
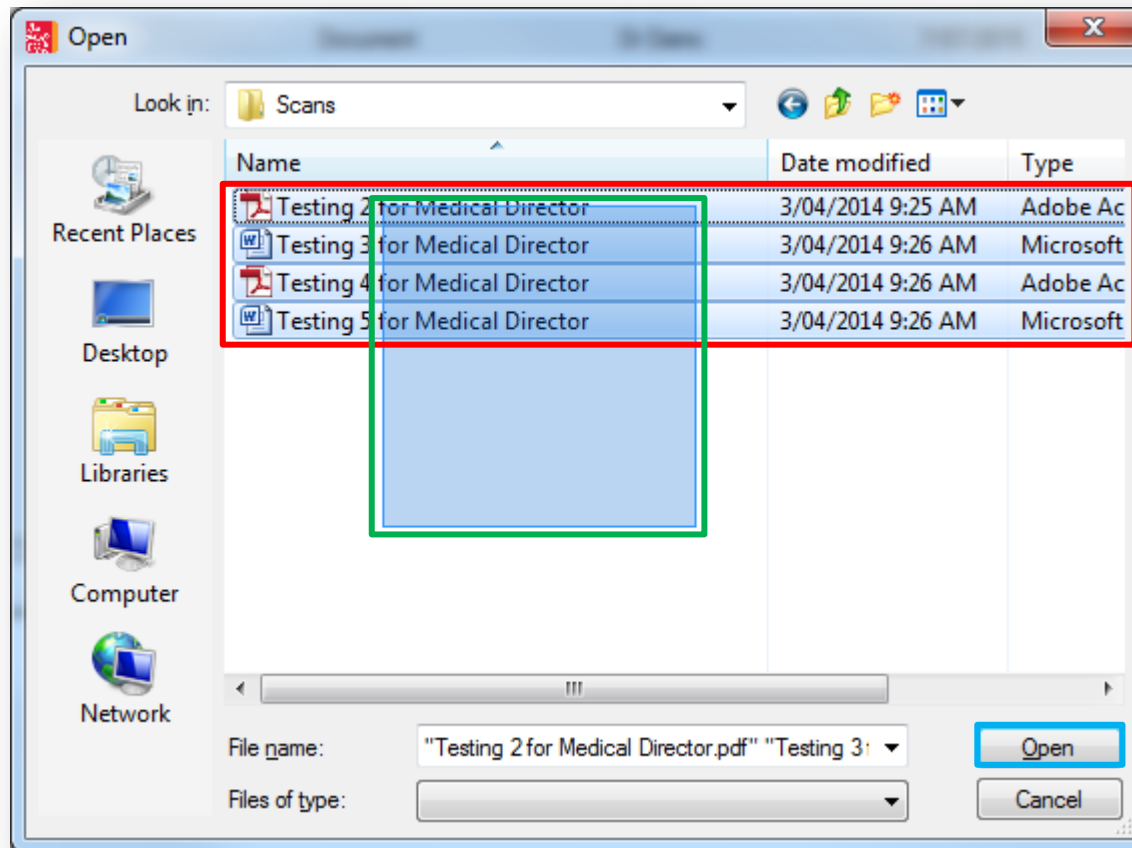
4. You will then be prompted to delete the source files after import. Select Yes as this will ensure you don't import files twice.
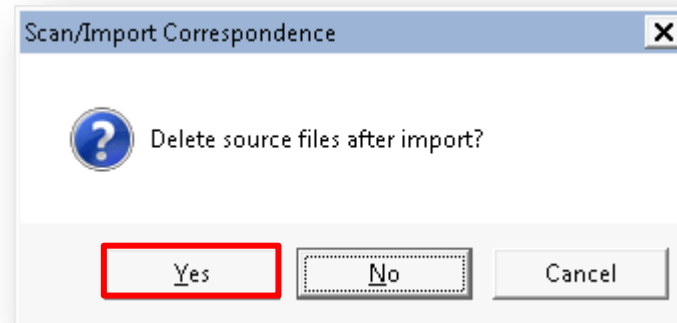
5. You have now successfully imported patient correspondence and it will be listed, ready for patient allocation.

Importing Correspondence

Allocating Correspondence to patients

1. Select the patient correspondence you wish to allocate and then select Document Details from the upper button set.

2. This will bring up the Document Details window. Items are described below and fields with an * are expanded upon in this guide.

| Field	Description
Date Entered:	Date the document was entered
Document Date:	The date of the document
Subject:	Subject of document
Description:	Brief description of document
Document Location:	Where the document is stored on the clinical record
Document Type:	List box of common clinical document types
Assigned to Recipient:	Clinician that document is assigned to
Select Patient:	Patient document is to be assigned to
OK & Cancel:	Saves any changes made or cancels changes

Importing Correspondence

Document Location

The Document Location is where tab is where on a patient clinical record correspondence will be stored. See table below for where correspondence should be stored.

Document Type	Location for Document
Any External correspondence	Document Tab
Any internal correspondence	Letters Tab
Any clinical results, Pathology etc.	Results Tab
Toolbox – ECG Tab	Only for ECG results

Document Details

Date Entered:
7/07/2015

Document Date:
7/07/2015

Subject:
Testing 1 for Medical Director

Description:

Document Location:
Documents Tab
Documents Tab
Letters Tab
Results Tab
Toolbox - ECG Tab

Dr Damo

Select Patient

OK   Cancel

Importing Correspondence

Document Type

Select the Document Type that most closely relates to the document you are allocating. It is important to get this right as its assists clinicians in accurately assessing a patient's health status.

Assigning a Recipient

Importing Correspondence

This field allows the correspondence to be assigned to a recipient, this ensures that the correspondence is allocated to the correct clinician, whether through the Holding file (See Managing Correspondence for Clinician's for more detailed information) or directly to the patient clinical record.

Importing Correspondence

Select Patient

This brings up the Select Patient window, where you can select a patient to allocate the correspondence to. To search for a patient, enter the first couple of letters of the patient surname, followed by a comma (,) and first couple of letters of the patient first name into the patient search bar. All patients matching that criterion will be listed. Select the appropriate patient and then hit OK.

Can't find the patient you are looking for? Try ticking the Include inactive patients.

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Upper Button Set

The upper button set has options for the preview pane, filters, document details, scanning, importing, printing, deleting and refreshing of listed correspondence. (Please note that the direct scan facility is not available within our IT environment and is not covered in this guide.)
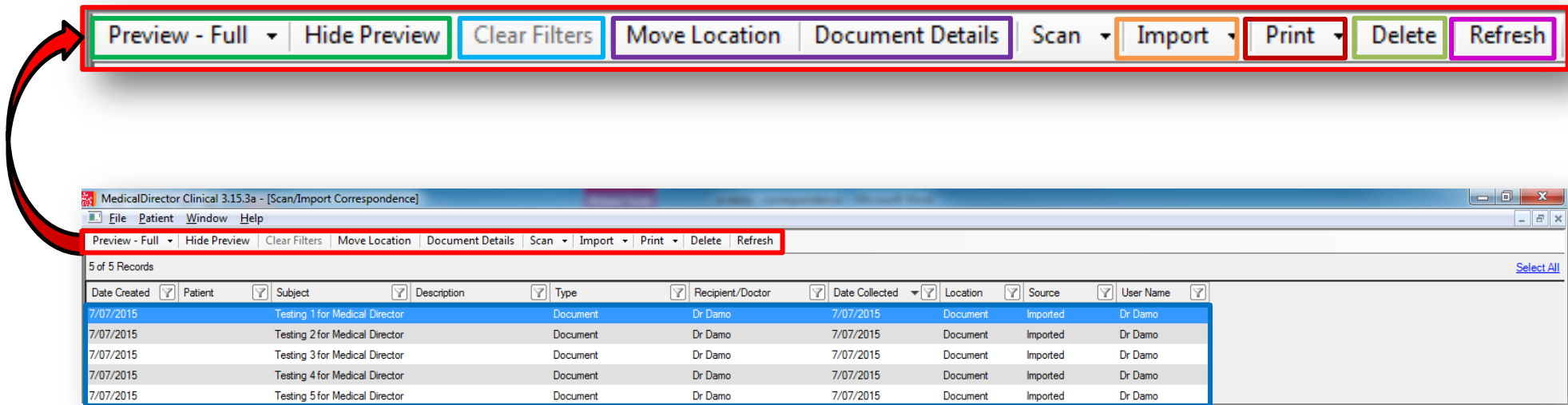
Preview options & Hide Preview:..................................Gives you the option to have the preview pane on the bottom, full screen, off or on the right.

Clear Filters:..Only available if a document field has been filtered. Filtered fields have a grey heading.

Move Location & Document Details: ....Move location has the same options as the Document Location and Type as in Document Details.

Import:..Covered above.

Print:..Will print selected correspondence including multiple selections.

Delete:..Will delete selected correspondence including multiple selections.

Refresh: ....Refreshes the listed document showing correspondence added by other users.

Importing Correspondence

Lower Button Set

The lower button set has options for navigating correspondence, assigning patient & recipient, storing correspondence, adding recalls, open clinical record, audit history and close the scan/import correspondence window.

| Previous | Next | Assign Patient | Reassign Recipient | Store to Patient | Store to Holding File | Add Recall | Open Patient | Audit History | Close |

Imported document a bit small? You zoom in and out for the best view.

Zoom 100%   Page: 1 of 1

Testing 1 for Medical Director

| Previous | Next | Assign Patient | Reassign Recipient | Store to Patient | Store to Holding File | Add Recall | Open Patient | Audit History | Close |

Dr Damo   HCN Live Data - GL-ADM02090N_7\HCNSQL07 Thursday, 23 July 2015   09:22:40 AM

Previous / Next: .... Switches the selected correspondence between the next and previous record.

Assign Patient / Recipient: .... Assign or change Patient / Recipient.

Store to Patient / Holding File: .... Stores selected correspondence to either clinical record or holding file, removing from list.

Add Recall: .... Adds a recall to correspondence.

Open Patient: .... Opens patient clinical record, taking you out of the scan /import correspondence window.

Audit History: .... Shows any actions on a correspondence by time/date stamp plus user logon.

Importing Correspondence

Moving Documents out of Scan/Import Correspondence.

1. Once the document details are complete, the final step in importing correspondence to select to either move the document into the patient clinical record or to move it to the holding file for a clinician to check before it is sent to the patient clinical record.
2. Highlight correspondence to be moved and then select either Store to Patient or Store to Holding File from the lower button set.
3. The record will then move out of the Scan/Import Correspondence listed documents to the selected destination.