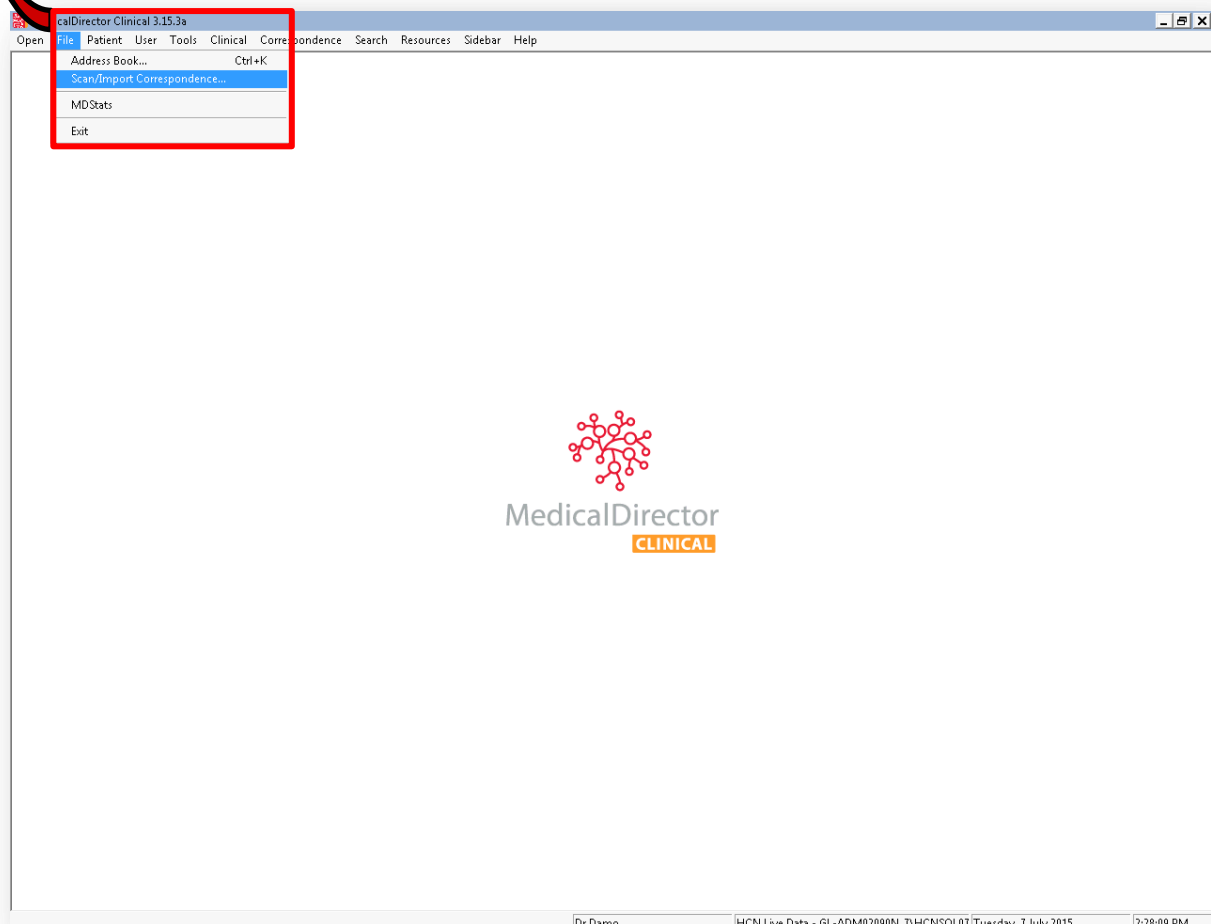
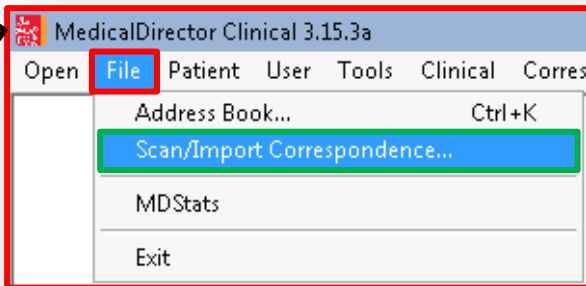


Importing Correspondence for Reception / Admin

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

- 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).

MedicalDirector Clinical 3.15.3a - [Scan/Import Correspondence]

File Patient Window Help

Preview - Full | Hide Preview | Clear Filters | Move Location | Document Details | Scan | Import | Print | Delete | Refresh

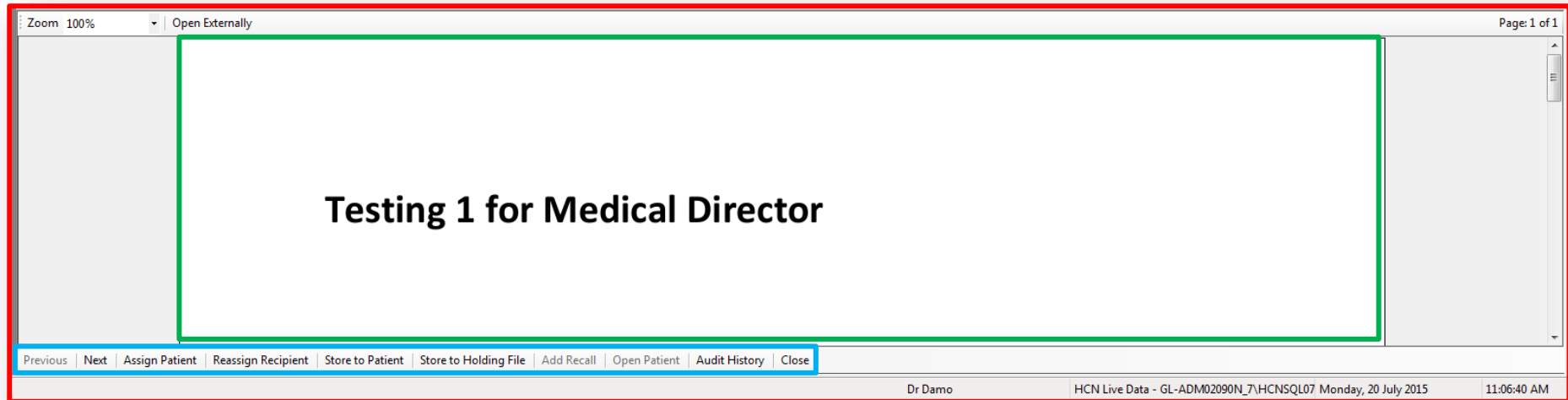
5 of 5 Records [Select All](#)

Date Created	Patient	Subject	Description	Type	Recipient/Doctor	Date Collected	Location	Source	User Name
7/07/2015		Testing 1 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 2 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 3 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 4 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 5 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo

Don't like where a fields is? Left click and hold to drag fields where you like!!

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.

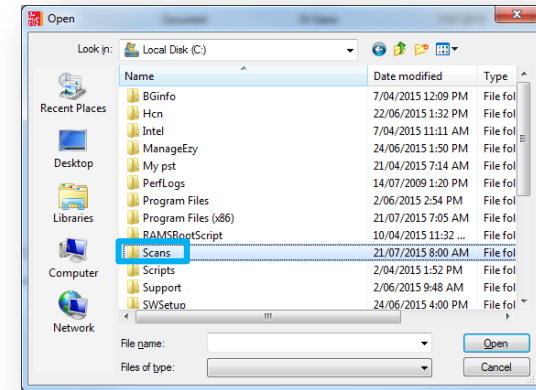
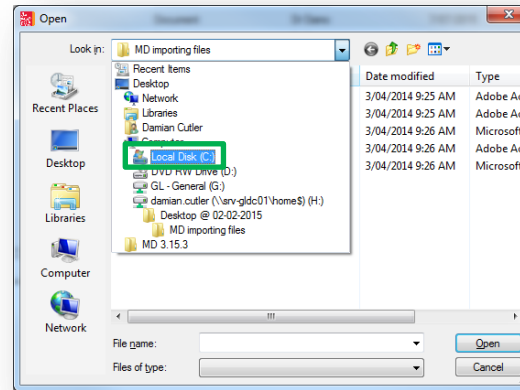
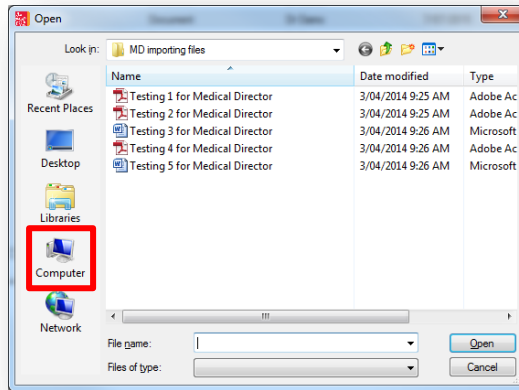
The screenshot shows the MedicalDirector Clinical 3.15.3a - [Scan/Import Correspondence] application window. The 'Import' button in the upper button set is highlighted with a red box. An 'Open' file dialog is open, showing a list of files named 'Testing 1 for Medical Director' through 'Testing 5 for Medical Director'. The text 'Testing 1 for Medical Director' is displayed prominently in the center of the application window.

Date Created	Patient	Subject	Description	Type	Import correspondence	Dr/Damo	Date Collected	Location	Source	User Name
7/07/2015		Testing 1 for Medical Director		Document		Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 2 for Medical Director		Document		Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 3 for Medical Director		Document		Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 4 for Medical Director		Document		Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 5 for Medical Director		Document		Dr Damo	7/07/2015	Document	Imported	Dr Damo

Testing 1 for Medical Director

Importing Correspondence

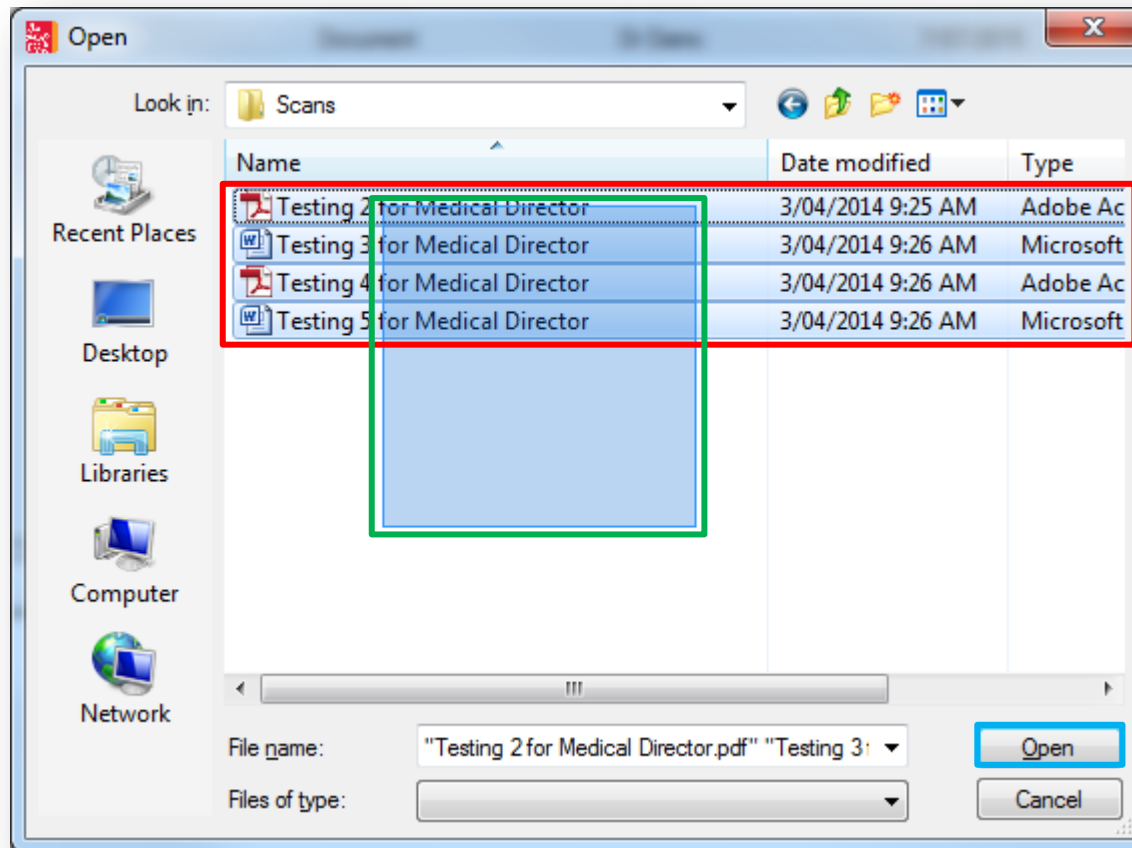
- From the Open window, select **computer**, select **Local Disk (C:)** from the list box, then **Scans**.



Note: Directory where scans are stored may vary from site to site.

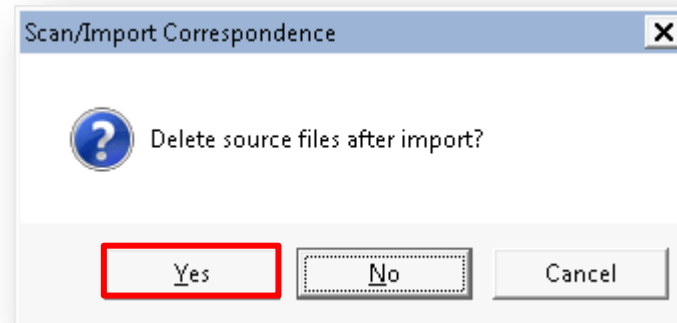
Importing Correspondence

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.



Importing Correspondence

- You will then be prompted to delete the source files after import. Select **Yes** as this will ensure you don't import files twice.



- You have now successfully imported patient correspondence and it will be **listed**, ready for patient allocation.

MedicalDirector Clinical 3.15.3a - [Scan/Import Correspondence]

File Patient Window Help

Preview - Full | Hide Preview | Clear Filters | Move Location | Document Details | Scan | Import | Print | Delete | Refresh

5 of 5 Records [Select All](#)

Date Created	Patient	Subject	Description	Type	Recipient/Doctor	Date Collected	Location	Source	User Name
7/07/2015		Testing 1 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 2 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 3 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 4 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 5 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo

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**.

Date Created	Patient	Subject	Description	Type	Recipient/Doctor	Date Collected	Location	Source	User Name
7/07/2015		Testing 1 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 2 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 3 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 4 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 5 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo

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

Document Details

Date Entered: 7/07/2015 Document Date: 7/07/2015

Subject: Testing 1 for Medical Director

Description:

Document Location: Documents Tab

Document Type: Document

Assigned to Recipient: Dr Damo

Select Patient

OK Cancel

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 Details

Date Entered: 7/07/2015 Document Date: 7/07/2015

Subject: Testing 1 for Medical Director

Description:

Document Location: Documents Tab

Dr Damo

Select Patient

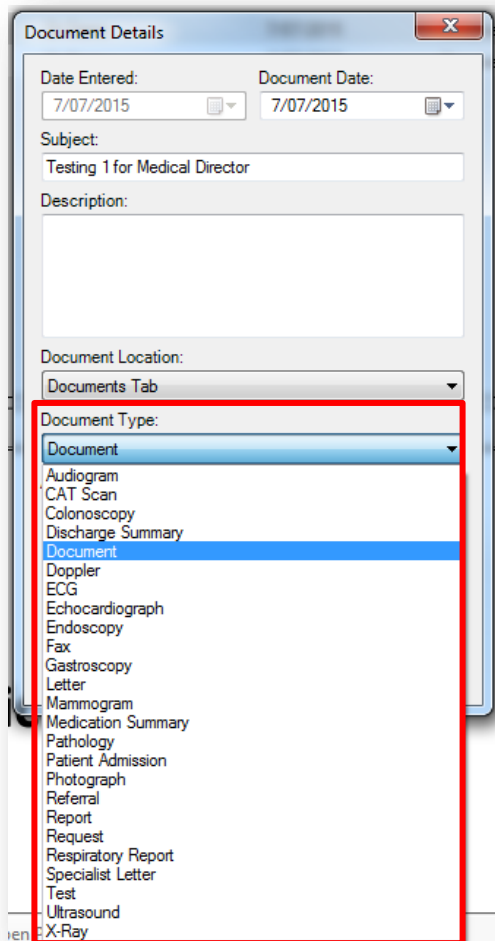
OK Cancel

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

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.



The screenshot shows a 'Document Details' window with the following fields:

- Date Entered: 7/07/2015
- Document Date: 7/07/2015
- Subject: Testing 1 for Medical Director
- Description: (empty text area)
- Document Location: Documents Tab
- Document Type: (dropdown menu open)

The dropdown menu for 'Document Type' is highlighted with a red box and contains the following options:

- Document
- Audiogram
- CAT Scan
- Colonoscopy
- Discharge Summary
- Document
- Doppler
- ECG
- Echocardiograph
- Endoscopy
- Fax
- Gastroscopy
- Letter
- Mammogram
- Medication Summary
- Pathology
- Patient Admission
- Photograph
- Referral
- Report
- Request
- Respiratory Report
- Specialist Letter
- Test
- Ultrasound
- X-Ray

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.

The screenshot shows a 'Document Details' dialog box with the following fields:

- Date Entered: 7/07/2015
- Document Date: 7/07/2015
- Subject: Testing 1 for Medical Director
- Description: (empty text area)
- Document Location: Documents Tab
- Document Type: Document
- Assigned to Recipient: (dropdown menu with a red border highlighting the list: Dr Damo, Dr Damo, Rn Training)

Buttons: OK, Cancel

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**.

Select Patient

Enter patient surname or chart number
and,d

Include inactive patients

Name	Age	Chart No.	Address	DOB	Phone No.
Anderson, David	60 yrs		61 Wallace Street, Bundaberg, 4...	4/01/1955	07 4952 5555

Status: Active

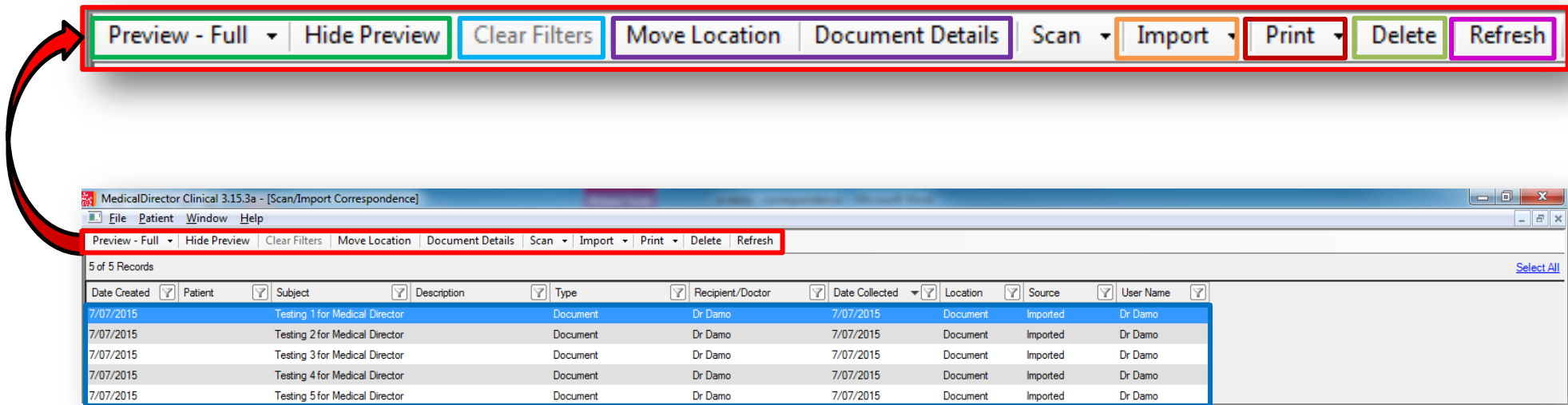
OK Cancel

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

Importing Correspondence

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: 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 login.

Importing Correspondence

Moving Documents out of Scan/Import Correspondence.

1. Once the document details are complete, the final step in importing correspondence is 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.

MedicalDirector Clinical 3.15.3a - [Scan/Import Correspondence]

File Patient Window Help

Preview - Full | Hide Preview | Clear Filters | Move Location | Document Details | Scan | Import | Print | Delete | Refresh

5 of 5 Records [Select All](#)

Date Created	Patient	Subject	Description	Type	Recipient/Doctor	Date Collected	Location	Source	User Name
7/07/2015	ANDERSON, Pe...	Testing 1 for Medical Director	Testing of importing docume...	Test	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 2 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 3 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 4 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo
7/07/2015		Testing 5 for Medical Director		Document	Dr Damo	7/07/2015	Document	Imported	Dr Damo

Zoom 100% | Open Externally | Page: 1 of 1

Testing 1 for Medical Director

Previous | Next | Reassign 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 11:41:42 AM