



MedicalDirector®
CLINICAL

Correspondence Management FAQs

For MedicalDirector Clinical 3.15 or Later

This guide responds to frequently asked questions about managing correspondence in MedicalDirector Clinical. It is designed to be used in conjunction with the MedicalDirector Clinical Help, and the Knowledge Base Article 'Correspondence Management with MedicalDirector Clinical', which provide more-detailed information.

Note also that this guide is designed specifically for users of MedicalDirector Clinical 3.15 or later. A version of this document for earlier releases is available from the MedicalDirector Knowledge Base at www.medicaldirector.com/kb

Document Management System User Configurations

Why was it changed?

The new Document Management System was introduced to facilitate safe, easy workflows for MedicalDirector Clinical customers. It provides the flexibility to organise all correspondence; Documents, Letters and Results to suit your Practice's workflow. There is also an audit trail of actions for all correspondence.

How do we filter documents within the new Document Management System?

'Quick' and 'Advanced' filtering methods are available;

Quick: Click the  button, or right-click column header, and select **Quick Filter this Column**.

Advanced: Right-click a column header in any of the correspondence windows, and select **Advanced Filters**.

Once a filter has been applied, a **Clear Filters** button appears at the top of the window. Clicking this clears all filters that have been applied to the window. Note that all filters are cleared by default upon closing a patient's record, unless you elect to save the filter first by right-clicking a column heading and selecting **Save Current Filters**. Note that saved filters are per practitioner, and are applied to each patient's record thereafter, until cleared manually.

See 'Filtering/Searching Correspondence Records' in the MedicalDirector Clinical Help for detailed instructions.

How do we sort documents within the new Document Management System?

Sort the list of Results by clicking on any column heading. The sort order of a column is indicated via the direction of the ▼ icon.

Can columns be re-arranged?

Yes. Click and drag a selected column, dropping it to a new location.

Can columns be hidden?

Yes. Right-click any column header and select Show/Hide Columns. A list of columns will appear, from which you indicate which columns you wish visible.

Are changes made to filters, sorting, and columns seen on all computers?

Yes. These sorts of changes are based on your MedicalDirector Clinical login, and will be displayed wherever you log into MedicalDirector Clinical.

There is too much space between each result. How can you show more results in the list?

Each column can be expanded to display all details on one line, instead of word-wrapped. Where details can be displayed on one line, MedicalDirector Clinical will attempt to automatically reduce the space between results.

Am I able to turn off the preview window?

Yes. The preview window controls the display of a selected document's details. In the top left hand corner of the screen click the **Preview** button. The available options are 'Full', 'Bottom', and 'Right'. You can also hide the preview pane by clicking the **Hide Preview** button.

The Correspondence Tab

What is the Correspondence tab for?

The Correspondence tab of the Clinical Window displays a list of all patient documents, as found on the Documents, Results, and Letters tabs. You can scan or import new documents via the Correspondence tab, and store them on either of the other tabs mentioned.

Why do documents, letters and results show on the Correspondence tab?

This tab displays the combined records from each of the Results, Documents and Letters tabs. You can also scan or import documentation, record new Investigations Results and compose new letters using the Letter Writer.

Can you hide the correspondence tab?

Yes. From the MedicalDirector Clinical front screen select **Tools > Options** select the **Clinical Tab**, and remove the tick from **Show Correspondence page** and save.

Scanning and Actioning Correspondence

Where is the Document Holding Bay?

The Document Holding Bay was removed from within MedicalDirector Maintenance; all document management is now performed within MedicalDirector Clinical. After upgrading to 3.14 and above, any scanned or imported correspondence you had in the Document Holding Bay will be available in the Scan/Imported Correspondence window or the Holding File.

Can I save documents to a Patient's Record via the Scan/Import Correspondence window?

Yes. If you didn't assign the document to a patient at the time you imported/scanned it, you can do so via the **Assign Patient** button. Then, click the **Store to Patient** button to simultaneously save it to the patient's record, and remove it from the Scan/Import Correspondence window.

Why can't a user action documents after scanning them?

All correspondence scanned/imported via the Scan/Import Correspondence window flows through to the Holding File, where the assigned practitioner can then check and action it accordingly, before storing it to a patient's record.

How do I scan/import a multi-page document?

When scanning: To scan a multi-page document, simply keep the **Scan Document** window open, and click the **Scan** button as often as you need to, to continue scanning.

When importing: To add multiple files to a single page, instead of clicking the **Import** button, click the **↓** button instead, and then click **Import to Single Item** from the menu that appears. Then, after selecting multiple files to import (by holding Ctrl as you click each file), the group of files are added to a single record within the patient's Clinical Window.

Managing Results

The Holding File shows the Practitioner's name multiple times and/or shows Surgery Names. Why?

The Holding File **Select Practitioner List** is populated with a list of practitioners that have results that need to be 'actioned'. The names in this list are sourced from the *recipient of the result*, from the *sender of the result*, and the name of the *practitioner assigned to the correspondence*. It is recommended that you contact your result provider to ensure they are displaying your name as you wish it to appear.

Once all correspondence has been actioned for that Practitioner/Name, the name will no longer appear on the list.

How do I notify a result with the preview turned off?

Select the result to be actioned and click **Full Preview**. This opens the result, and the action buttons will be made available.

How do I print a list of items marked as Return Urgently?

1. From the MedicalDirector Clinical front screen select **Correspondence > Actioned Items** to open the Actioned Items window.
2. Filter the **Date Checked** column (select a required date range).
3. Filter the **Notation** column to display **Return Urgently** only.
4. Highlight the results you wish to print, by using the CTRL or SHIFT key (in standard Windows fashion). Alternatively, you can select all items simultaneously by clicking the **Select All** link.
5. Click the **Print List** button.

Why can I see Results in the Correspondence tab but not in the Results tab?

The results tab has had a filter applied to it. By clicking the **Clear Filters** button on the Results tab, all results will now be visible. The same applies for the Documents and Letters Tabs.

Why does a blank page get printed when I print Correspondence?

Printing of Correspondence (including Investigation Results) is linked to the Preview window. Click **Full Preview** to print or turn on the preview window.

How does a doctor action documents that are in the holding file?

Select **Correspondence > Check Holding File**. If 'preview' is enabled when selecting the result, the action buttons will be available at the bottom of the screen. If 'preview' is disabled you will need to click Full Preview or double click to view the result. Once actioned, the next result will be presented for actioning.

How do I notify a result?

A result may be notified by:

- Clicking the **Notify** button at the time of actioning the result or when viewing the result in the patient's file or in the actioned items list. If 'preview' is disabled you will need to click Full Preview or double click to view the result.
- Printing a list from the Actioned Items screen and actioning the prompt to mark as notified.