



MedicalDirector®
CLINICAL

MedicalDirector Clinical Set-up Guide

This MedicalDirector Clinical Set-up Guide is intended to assist new customers with configuring the minimum required setup for your Practice. It is recommended that you read this guide thoroughly beforehand, as doing so will assist you in gathering the information needed for MedicalDirector Clinical first-time use. Note also that you may need assistance from your Systems Administrator with some of the settings outlined following.

Beyond the basics presented in this guide, consider the guide **Getting Started with MedicalDirector Clinical** to quickly become familiar with MedicalDirector Clinical's core functionality; the basic features of MedicalDirector Clinical that you will use every day. Detailed tutorials are found in the Online Help, accessed by pressing F1 from anywhere in within MedicalDirector Clinical. Knowledge Base articles are also available online via www.medicaldirector.com/kb. Should you require further assistance relating to your MedicalDirector PracSoft software, please contact MedicalDirector Customer Care on 1300 788 802 or log an enquiry online via <http://medicaldirector.com/Quick+Links/Create+A+Support+Enquiry>.

Before You Begin

Initial Start-up Requirements – for ‘MedicalDirector Clinical Hosted’ Environments

<input type="checkbox"/>	You have provided MedicalDirector Clinical Hosted with the relevant details for initial setup; <ul style="list-style-type: none">○ Practitioner details○ MedicalDirector Clinical Email requirements
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Initial Start-up Requirements – for non-‘Hosted’ Environments

<input type="checkbox"/>	MedicalDirector Clinical Licence Key.
<input type="checkbox"/>	Details of at least one practitioner, including their Prescriber Number and Provider Number.
<input type="checkbox"/>	At least one installed printer.
<input type="checkbox"/>	An active Internet connection, which is required for registering for MDExchange and ePrescribing.
<input type="checkbox"/>	Ensure your System Administrator has provided your computer with email access. Web-based email services such as Hotmail are not compatible. Ensure the email software you wish to use with MedicalDirector Clinical is the default email software on the computer (required only if you wish to send email via Letter Writer).

eHealth Requirements

<input type="checkbox"/>	Ensure your practice is registered for ePIP.
<input type="checkbox"/>	Obtain a Healthcare Provider Identifier – Organisation (HPI-O) number. For information, visit the Medicare for Healthcare Professionals web site www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N10097
<input type="checkbox"/>	Obtain a Healthcare Provider Identifier – Individual (HPI-I) number. For information, visit the Medicare for Healthcare Professionals site www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N1012B
<input type="checkbox"/>	Obtain IHI Signing and IHI Encryption certificates, ensuring they have been configured for access to HI Service. www.medicareaustralia.gov.au/provider/health-identifier/index.jsp#N10271 Obtain the guide, ‘PIP eHealth Incentive Requirement - 1 Healthcare Identifiers’ http://medicaldirector.com/gp+cl+ehealth/video+guides
<input type="checkbox"/>	Obtain a National Authentication Service for Health (NASH) PKI certificate. www.medicareaustralia.gov.au/provider/vendors/pki/index.jsp#N1007A
<input type="checkbox"/>	You have installed software for SMD-compliant Messaging. MedicalDirector has partnered with Healthlink which provide a free messaging service to GPs; www.healthlink.net , ph. 1800 125 036, email ehealth@healthlink.net . For complete list of SMD-compliant messaging vendors, see https://epipregister.NEHTA.gov.au/registers/secure-message-delivery .

Opening and Logging-On to MedicalDirector Clinical

If using MedicalDirector Clinical with MedicalDirector PracSoft, add a user to MedicalDirector PracSoft *first*. They will be available to MedicalDirector Clinical when next opening. When first logging into MedicalDirector Clinical, you will be prompted if additional information is required.

Registering MedicalDirector Clinical – *required only for non-Hosted sites.*

1. Double-click the MedicalDirector Clinical icon on your Desktop. MedicalDirector Clinical opens and you are prompted to log on.
2. To register MedicalDirector Clinical, select the **HCN Live Database** from the Databases drop-down list.
3. When prompted, enter the Licence details exactly as supplied to you by MedicalDirector. Click **Validate**. Click **Save** and then **Close** to continue.

Adding a Practitioner

For MedicalDirector Clinical Hosted sites, your first practitioner record will be configured for you.

After registering, add a practitioner when prompted. Users can be managed later via Users > Setup Users.

- On the Add Doctor window, fields marked with * are mandatory.
- The first doctor you add will have top-level access by default. Give them Options Editing privileges also.
- Elect whether to enable ePrescribing for this practitioner. ePrescribing is optional, and registration is required for participation. Regardless of your choice now, you will be prompted to register for ePrescribing shortly.
- Complete eHealth information for this doctor now, including their PCEHR Details and HPI-I number.
- After clicking OK, create a password of 6-to-10 characters that does not include any part of the Doctor's name. Click **Save** to confirm.

You can add further practitioners, along with other types of users later. See 'Managing Practitioner and User Records' in the MedicalDirector Clinical Help (press F1) for detailed information.

Register for MDEXchange¹

You will be prompted to register for MDEXchange, after which you can use the service, and manage correspondence.

1. Click the **Next** button. The **MDEXchange Licence Agreement** appears. You must agree to the Licence to continue.
2. The **MDEXchange Server Connection Setup** window appears.
3. Click the **Next** button. A test for connectivity is performed. Only when a connection has been established successfully will you be able to proceed with the MDEXchange Registration Wizard. *If the connection fails, please consult your Systems Administrator for assistance.*
4. The **Contact Details** window appears. Record your Practice's details here. Note that changes made here are saved back to the Practice tab of MedicalDirector Clinical Options.
5. Click the **Next** button. The **Security Options - Location** window appears.
6. Determine which type of Certificates you will use for the digital signing and encrypting of correspondence you send and receive via MDEXchange. Select the certificate type using the appropriate option. The default and recommended certificates are MDEXchange Certificates. Alternatively you can select HESA Health Signature Authority Certificates. Note that you cannot select HeSA tokens (i-Keys) for Practice encryption or signing because that would require the token to be constantly available (plugged in) to the server computer.

¹ MDEXchange is a system and subscriber service for the rapid, secure electronic transmission of communications between medical professionals, allowing doctors to create correspondence in Letter Writer, sending it securely to other MDEXchange users within the MDEXchange online directory (File > Send via MDEXchange).

7. Click the **Next** button. The **Setup User Profiles** window appears. Here you have an opportunity to indicate which practitioners will *not* have access to MDEXchange. For those that *do* have access you can also specify how they will be listed in the MDEXchange Public Database, and what signing certificate they will use for correspondence (via the Advanced button).

Being privately-listed in MDEXchange means that the user is generated a Private ID. This user is added to the MDEXchange public database and visible only to other registered users of MDEXchange of their choosing, by giving them this private ID which is used as part of the search criteria for discovering that person. Note that the MDEXchange system and functionality is only available to registered users.

Being publicly-listed in MDEXchange means that the user will be added to the MDEXchange public database and be visible to other registered users of MDEXchange. Note that the MDEXchange system and functionality is only available to registered users.

- If you use a HESA Health Signature Authority token as the signing certificate for a user (rather than the default which is to use the practice's signing certificate), indicate this now via the **Advanced** button.
 - Make changes as necessary for each user, and click the **Next** button on the Setup User Profiles window when you are ready to continue.
8. The **Ready to Register** window appears. Click the Back button if you need to go back through MDEXchange Registration Wizard to review your settings.
 9. When you are ready to register MDEXchange, click the **Register** button. The MDEXchange Registration Wizard attempts to connect to the MDEXchange server to validate and record your settings. You will be notified upon successful registration.

Register for ePrescribing² Participation

You will be prompted to register for ePrescribing, after which you can use the service. See 'ePrescribing and eRx Script Exchange – About' in the MedicalDirector Clinical Help (press F1) for detailed information.

Conclusion

MedicalDirector Clinical is now open, and you are presented with the 'Select Patient from List' window. Close this window for now - before you can begin attending to your patients, you need to configure some important settings, explained following.

Important Settings

Printers

Select Tools > Print Options > Printer Setup tab. Changes made here must be performed on each computer on which you run MedicalDirector Clinical. There are 4 different printer 'types';

- **Script:** for Prescriptions.
- **Pathology:** for Pathology requests.
- **Radiology:** for Imaging requests.
- **Letter:** for plain paper printing, e.g. Summaries, Assessments.

Print jobs can be sent to different printers on your network and to different print trays. Via Print Options you can also adjust the placement of printed data. See 'Print Options' in the MedicalDirector Clinical Help (press F1) for detailed information.

² ePrescribing has been developed to improve patient safety by ensuring that the information on a patient's prescription arrives exactly as intended.

Practice Address Details

Select Tools > Options > Practice tab. Enter you Practice's details, including your HPI-O number.

Linking MedicalDirector Clinical to Third-Party Billing Packages

If you run MedicalDirector PracSoft in conjunction with MedicalDirector Clinical it is not necessary to configure linking, as both applications share the same patient database. However if you run a third-party billing package, you can synchronise patient data added/edited in the billing package with MedicalDirector Clinical. See 'Links Options' in the *MedicalDirector Clinical Help (press F1) for detailed information.*

Practice Incentives Program (PIP) eHealth Incentive

The following guides are available from <http://medicaldirector.com/gp+cl+ehealth/video+guides>

- Requirement 1 - **Integrating Healthcare Identifiers into Electronic Practice Records**
- Requirement 2 - **Secure Messaging Capability (SMD)**
- Requirement 3 - **Data Records and Clinical Coding**
- Requirement 4 - **Electronic Transfer of Prescriptions**
- Requirement 5 - **Personally Controlled Electronic Health (eHealth) Record System PCEHR, and
- Creating and Managing CDA Documents for PCEHR**

Configuring MedicalDirector Clinical for Email Correspondence

1. In MedicalDirector Clinical, press F8 to open Letter Writer.
2. Select File > Preferences > Advanced tab.
3. Select an Email Client Type. Please consult your System Administrator if you need assistance.
4. Exit Letter Writer. Close and Restart MedicalDirector Clinical.

See 'Email' in the *MedicalDirector Clinical Help (press F1) for detailed information.*

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