



## Correspondence Management FAQs

Medical Director 3.14 introduced several changes to the ways in which incoming and outgoing correspondence is managed.

Existing systems such as the Holding File were enhanced, and new features such as the patient's Correspondence tab were added. A new utility for scanning and importing documents is also available.

This guide responds to frequently asked questions about these changes. It is designed to be used in conjunction with the Medical Direct or Help, and the Knowledge Base Article 'Correspondence Management with Medical Director', which provide more-detailed information.



## Document Management System User Configurations

### Why was it changed?

The new Document Management System was introduced to facilitate safe, easy workflows for Medical Director 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?

Each column of information has a drop down menu offering various filtering options (which differ depending on the type of data the column displays). Clicking on the column heading allows sorting in ascending or descending order i.e. oldest to latest date or vice-versa, or alphabetical order.

### Can columns be re-arranged?

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

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

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

### 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, Medical Director 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 'Off', 'Bottom', and 'Right'.

## 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 Medical Director front screen select **Tools > Options** select the **Clinical Tab** > 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 HCN Maintenance; all document management is now performed within Medical Director. After upgrading to 3.14, any scanned or imported correspondence you had in the Document Holding Bay will be available in the following windows: Scan/Imported Correspondence or the Holding File.

### I scanned a document into the new Scan/Import Correspondence window.

#### Why won't it automatically go into the patient's file?

Correspondence in this window will not be automatically stored to the patient's record, but will be available to the assigned doctor to action via the Holding File.

### Can you assign a patient correspondence without the doctor checking it in the holding file first?


Yes. You can import files either directly into a patient's record via the Correspondence tab, Results tab, Letters tab or Documents tab, *or* from the Medical Director front screen via the **Correspondence > Actioned Items** window.

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

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.

### 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'. These names are sourced from the recipient of the result, from the Sender, or the Practitioner's name that has been assigned to the correspondence. 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?

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1. From the Medical Director 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?

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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?

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

## Where have my 'Previous' and 'Next' buttons gone?

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If the Preview window is turned off you are not able to see the buttons. Click **Full Preview** or turn on the preview window.

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

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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?

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A result may be notified by:

- Clicking the **Notified** 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.

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