Correspondence Management with Medical Director

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 is an overview of these changes explained using examples of real-world workflow scenarios. It is designed to be used in conjunction with the Medical Director Help, which provides more-detailed information.

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Which Workflow Meets the Needs of your Practice?

Check which workflow is applicable to your practice before using MD/PS 3.14 or later.		**Recommended Workflow**
☐	1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are reviewed and stamped by practitioners. 2. Practice staff scan/import these documents in bulk and store results within the patient's record via Document Holding Bay, *pre* MD/PS 3.14.	Workflow 1 (page 3)
☐	1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are reviewed and stamped by practitioners. 2. Practitioner or practice staff scan/import these documents and store the results directly to the patient's clinical record.	Workflow 2 (page 5)
☐	1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are scanned/imported by practice staff via the Document Holding Bay, *pre* MD/PS 3.14. 2. Practice staff verbally notifies the practitioner that new results are stored within the patient's clinical record for their review, if action is required.	Workflow 3 (page 7) **or** Workflow 4 (page 9)
☐	1. Patient's paper-based results (Pathology, Radiology, Pap Test etc.) are scanned/imported directly to the patient's clinical record by practice staff. 2. Practice staff verbally notifies the practitioner that new results are stored within the patient's clinical record for their review, if action is required.	Workflow 3 (page 7) **or** Workflow 4 (page 9)

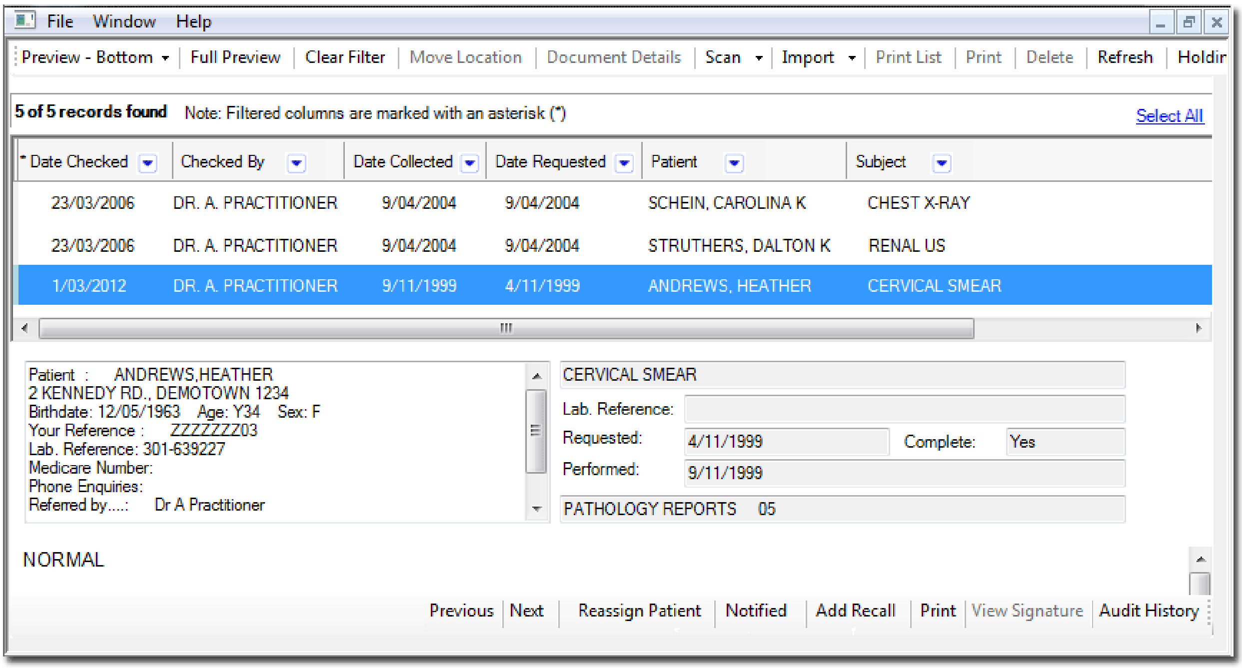
Workflow 1 – Via the Investigations Correspondence Window

This is *not* available to users with 'basic' access, unless you have enabled the 'Display Results to Staff' option.

This workflow should *only* be followed when you need to import/scan results that have *already been actioned.*

1. Either;
    - From within the Clinical Window select **Correspondence >Actioned Items**, or
    - From the Medical Director front screen select **Correspondence > Actioned Items**

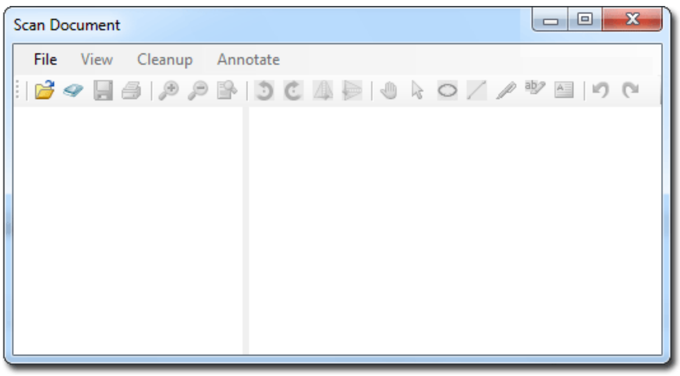
   The **Investigations Correspondence** window appears.



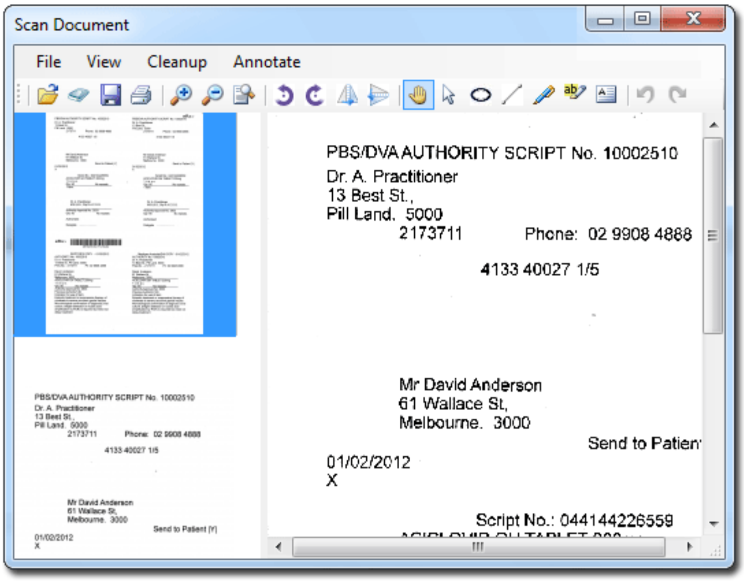
Please see 'Managing Previous Results for All Patients' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
    - If you choose to import a document, you will be asked to browse to and select a document to import. Skip to Step. 6.
    - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.

3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.

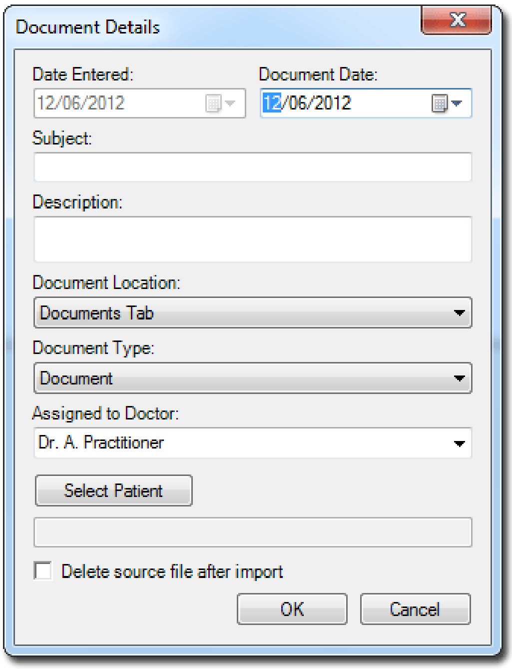


4. You will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

5. Click the **Save** button to save the current document.
6. The **Document Details** window appears. Enter details as desired. You ***must*** associated this document with a patient, ***and*** assign it to a doctor at this time also.



7. Click the **OK** button to confirm and save the information. You will be returned to the Investigation Results Window.

This concludes the steps for scanning/importing documents into the Investigation Results window.

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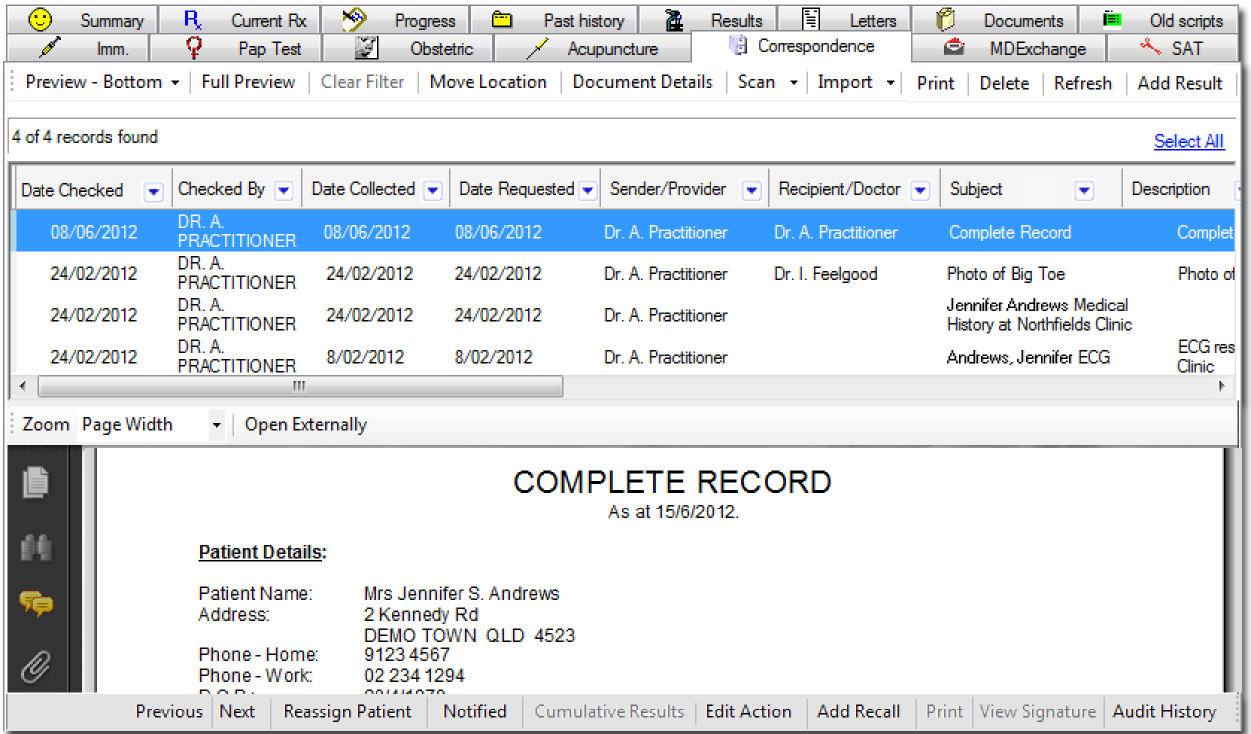
Workflow 2 – Via the Patient's Clinical Window

This is *not* available to users with 'basic' access.

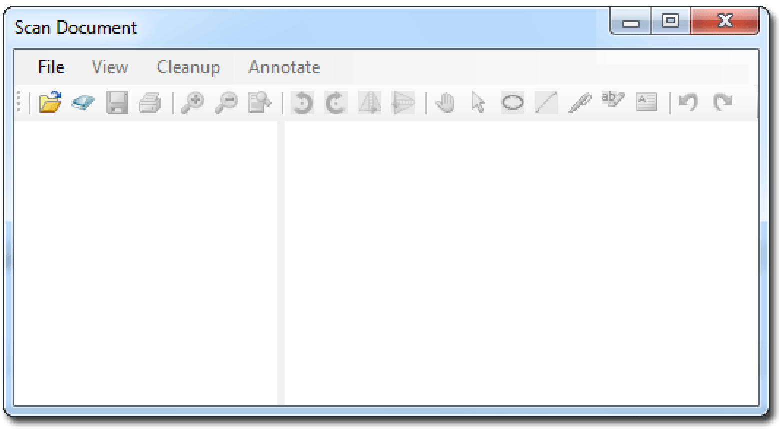
1. Within the patient's Clinical Window, select either of the Correspondence, Results, Letters, or Documents tabs. You can import/scan from any of these tabs, and then move the resulting document between tabs if you wish. As the Correspondence tab displays a culmination of documents from other tabs, it will be used for the remained of this example workflow.



Please see 'Correspondence Tab' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
   - If you choose to import a document, you will be asked to browse to and select a document to import. Skip to Step. 6.
   - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.

3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.



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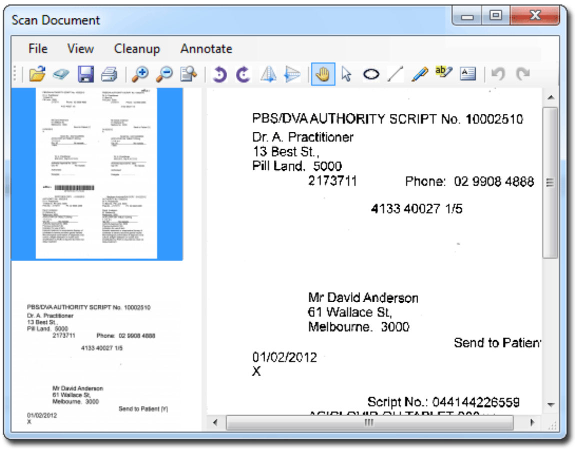
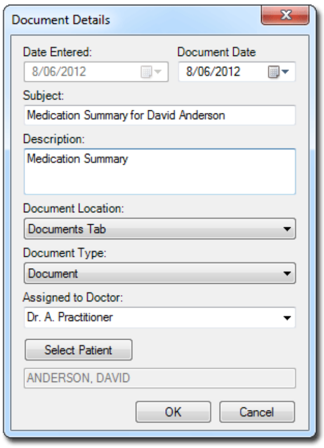
4. You will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

5. Click the **Save** button to save the current document.
6. The **Document Details** window appears. Enter details as desired. The Subject and Document Type is required information. As you have scanned/imported this document within a specific patient's record, it is assumed that it belongs to this patient, and as such they will be selected by default, as shown in the following image. You can always associate it with another patient if you wish. It is advisable to assign this document to a practitioner at this time also.



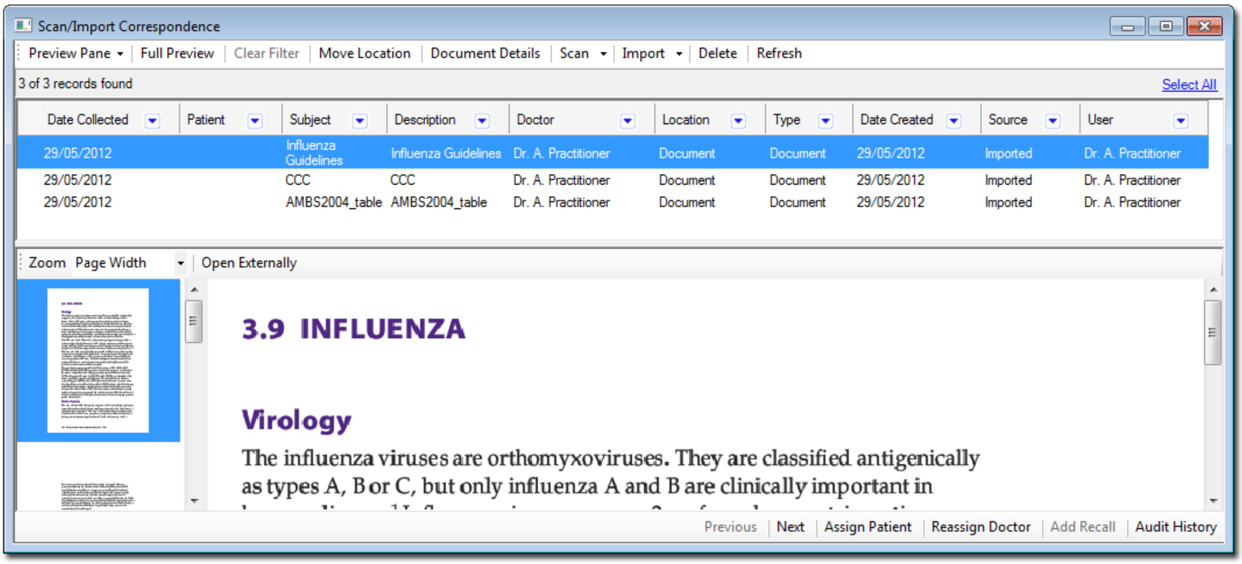
7. Click the **OK** button to confirm and save the information. You will be returned to the Clinical Record.

This concludes the steps for scanning/importing documents into the patient's record.

Workflow 3 – Via the Scan/Import Correspondence Window

The Scan/Import Correspondence Windows is available to all users.

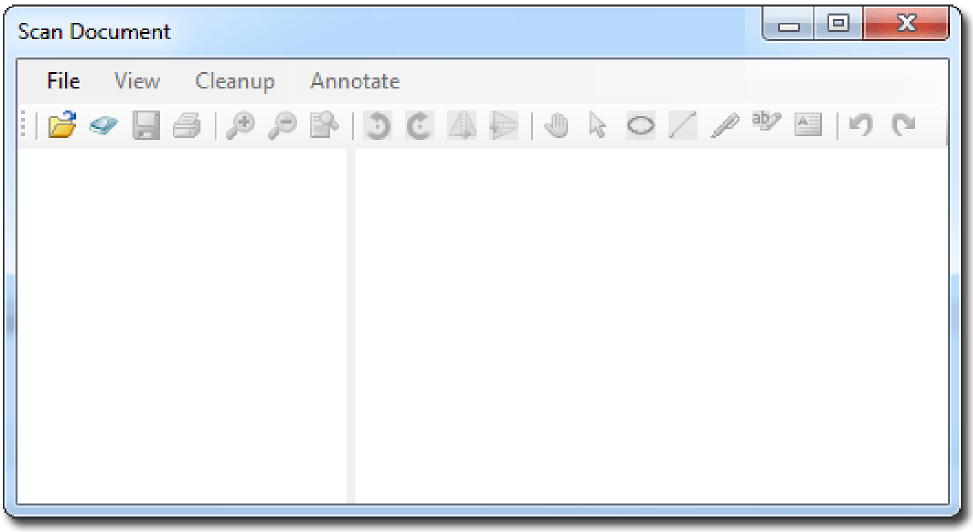
1. Log into Medical Director as *any user*, select **File > Scan/Import Correspondence**. The Scan/Import Correspondence Window appears. When opening this window, the default view is filtered to display *only* those items scanned or imported by the user currently logged into Medical Director. To display items scanned/imported by *all* users, click the **Clear Filter** button.



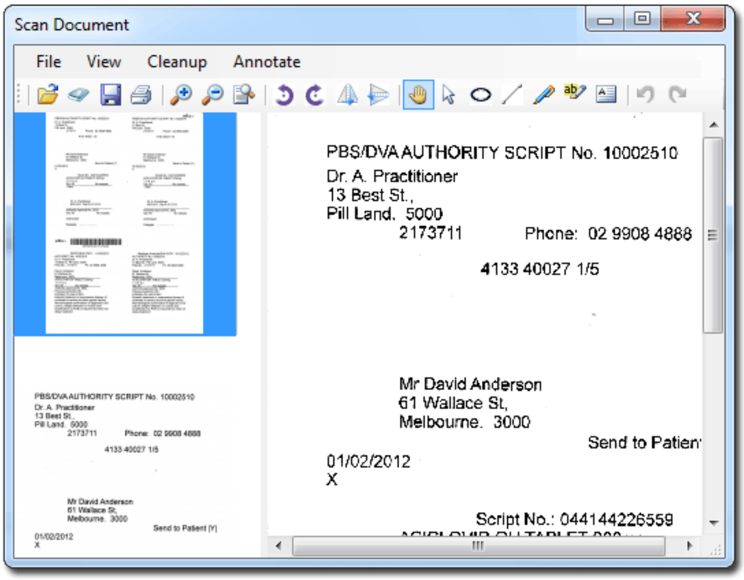
Please see 'The Scan/Import Correspondence Window' in the Medical Director Help for detailed information about this window.

2. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
   - If you choose to import a document, you will be asked to browse to and select a document to import. Skip to Step. 6.
   - If you choose to scan a document, the scanning utility will appear. Continue now to Step 3.

3. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.

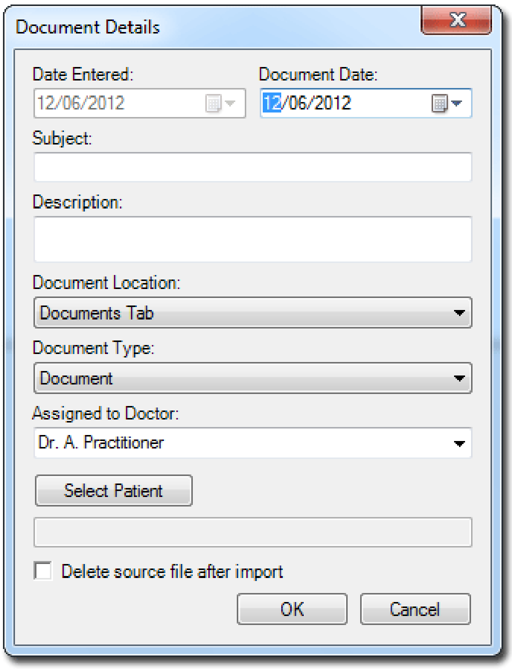


4. Upon completing the scan you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

5. Click the **Save** button to save the current document.
6. The **Document Details** window appears. Enter details as desired. It is advisable to associate this document with a patient, and assign it to a doctor at this time also.



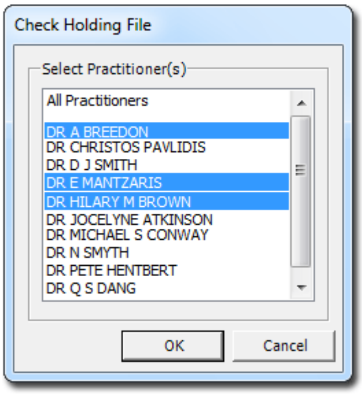
7. Click the **OK** button to confirm and save the information. You will be returned to the Save/Import Correspondence Window.

This concludes the steps for scanning/importing documents into the Scan/Import Correspondence window. Documents added to Medical Director in this way will appear within the Holding File, ready to be actioned by a doctor, after which they will be removed from both windows, and stored within the patient's record.

Workflow 4 – Via the Holding File

This is accessible to practitioners with Top-Level Access and users with Full Access where the 'Display Results to Staff' Investigations option is enabled.

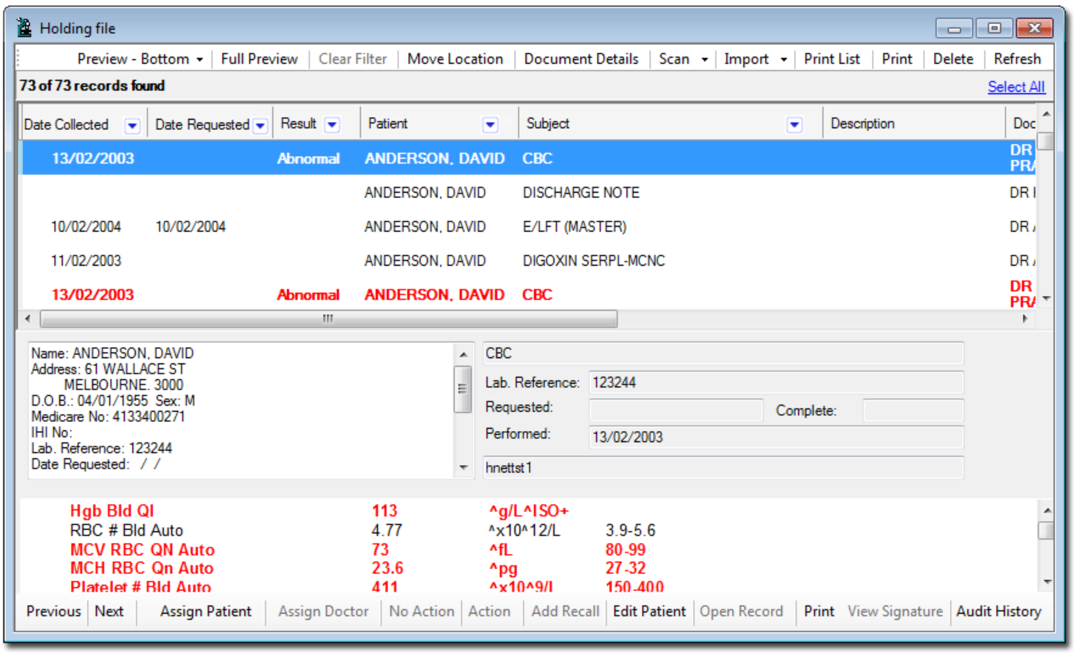
1. Log into Medical Director as *a practitioner with top-level access*, select **Correspondence > Check Holding File**. You will be prompted to select one or more practitioners whose results you wish to examine.



2. From this window select the practitioner(s) whose results you wish to examine:
   - Select a single practitioner by clicking their name, and then clicking the **OK** button to open the Holding File to display only their results. Alternatively you can double-click a name to simultaneously select them and open the Holding File.
   - Select multiple practitioners by clicking each name. To deselect a name, simply click it again. Then, click the **OK** button to open the Holding File to display only the results of the selected practitioners.
   - Select all practitioners by clicking the All Practitioners option. Clicking the **OK** button then opens the Holding File to display results for all practitioners. Alternatively you can double-click the All Practitioners option to simultaneously select all practitioners and open the Holding File.

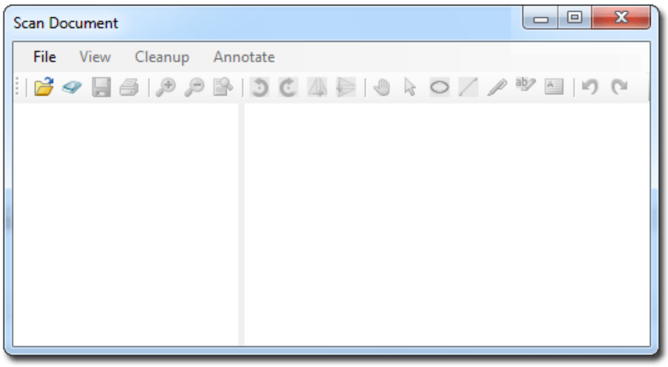
     Note that, as making a selection from this window locks the results associated with the selected practitioner, it is recommended that you select only a specific practitioner, as selecting All Practitioner will prevent others from accessing any results whilst you have the Holding File open.

3. You will be presented with the **Holding File**.

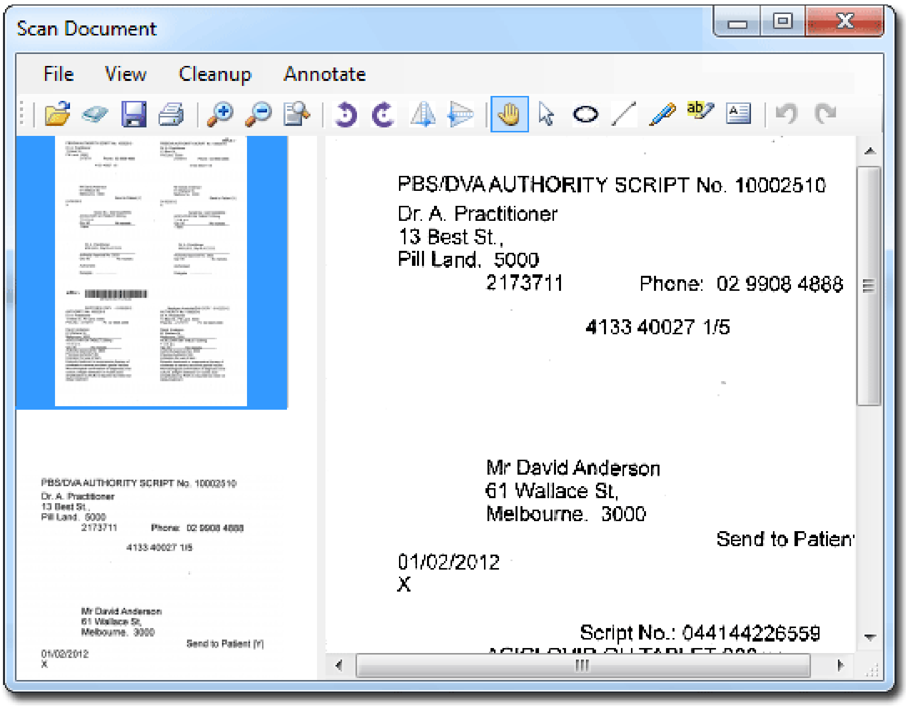


4. Choose whether to import or scan a document by clicking the associated button in the upper tool bar;
    - If you choose to import a document, you will be asked to browse to and select a document to import. Skip to Step. 8.
    - If you choose to scan a document, the scanning utility will appear. Continue now to Step 5.

5. If you have chosen to perform a scan, your third-party scanning software will be called upon. It is with this software you perform the scan, after which you will be returned to Medical Director and presented with the Scan Document window.



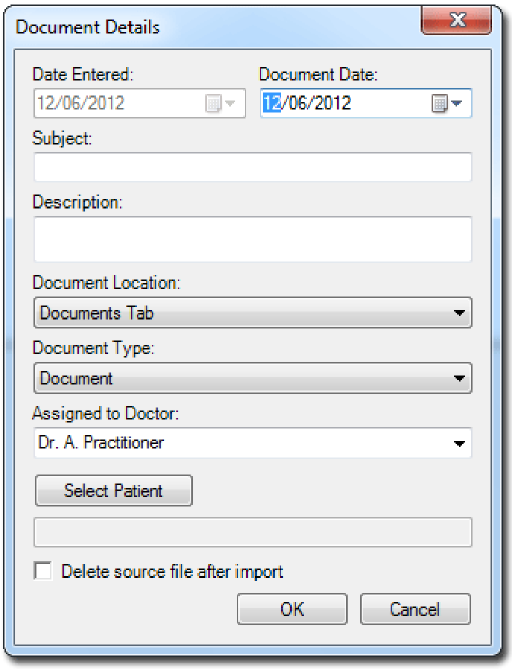
6. Upon completing the scan, you will be able to see a preview of the scan you have conducted, along with all the other scans you have added to this document. Each thumbnail on the left-hand side of this window represents a page that you have either scanned or imported into this document. The example below shows that the current document consists of two scanned pages. From here you can delete pages, rearrange pages, and add annotations.



Please see the topic 'Scanning Documents' in the Medical Director Help for more information.

7. Click the **Save** button to save the current document.

8. The **Document Details** window appears. Enter details as desired. It is advisable to associated this document with a patient, and assign it to a doctor at this time also.



9. Click the **OK** button to confirm and save the information. You will be returned to the Holding File.

This concludes the steps for scanning/importing documents into the Holding File.

From within the Holding File, you can now;

- Associate a selected record with a different patient.
- Assign a selected record to a different practitioner.
- Modify a document's details.
- Action results/records.
- Add Recalls.
- Indicate on which tab within the Clinical Window a selected document should reside once saved to the patient's record.
- View the digital signature (if available) associated with any selected document.
- View an audit trail of modifications made to a selected record.

Please see 'The Holding File' in Medical Director Help for further information.

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