Welcome to our Webinar

Correspondence Management in MD3.14c

Presented by Katrina Otto, Train IT Medical

www.trainitmedical.com.au

Our Learning Objectives:

1. Understand the new Correspondence Management options in MD3.14c.

2. Design an effective Results Management Practice protocol.

3. Import and scan documents and photos in MD.

4. Update patient records from Holding File.

5. Add patient recalls from Holding File.

6. Change file location of documents.

7. View and follow up results.

1. Pathology Management (Investigations) is now......

Correspondence Management

Practices need:

- Goals/Plan

- Defined roles

- Communication

- Clear system

- Training

The Holding File

May Contain:

1. *Results -*
    sent from Pathologist or Radiologist

2. *Specialist Letters/Discharge Summaries etc*
    sent through MDExchange

3. *Scanned Documents -*   *New!*
    Not yet sighted by clinician

4. *CDA Documents -*   *New!*

The Holding File – F5
Watch the filters!

Medical Director 3.14a - [Holding File]

File   Window   Help

Preview - Off ▾ | Full Preview | Clear Filter | Move Location | Document Details | Scan ▾ | Import ▾ | Print List | Delete | Refresh

15 of 15 records found

| Date Collected ▾	Date Requested ▾	Result ▾	Patient ▾	Subject ▾	Description ▾	Doctor ▾	Provider ▾	Location ▾	Type ▾
01/11/2012				Duodenal Ulcer		Dr Katrina Otto		Document	Photograph
01/11/2012				Chicken in Oesophagus		Dr Katrina Otto		Document	Photograph
13/01/2011	13/01/2011		DILLON, JOE	MR JOE DILLON		DR KATRINA OTTO	MDX1412B	Document	Specialist Letter
13/01/2011	13/01/2011		DILLON, JOE	MR JOE DILLON		DR KATRINA OTTO	MDX1412B	Document	Specialist Letter
13/01/2011	13/01/2011		DILLON, JOE	MR JOE DILLON		DR KATRINA OTTO	MDX1412B	Result	Pathology Results
01/09/2006	01/09/2006		PATIENT, TEST32E	INR		HELLO COMPUTER DEPARTMENT	SDS PATHOLOGY	Result	Pathology Results

Rightclick to change location

The Holding File (F5)

Actioned Items
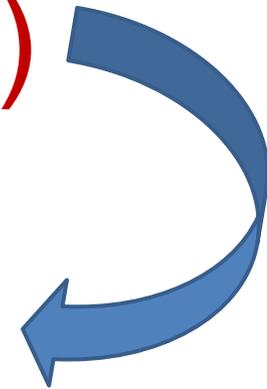
Actioned Items

Watch the filters!

Medical Director 3.14a - [Investigations Correspondence]

File   Window   Help

Preview - Off ▾ | Full Preview | Clear Filter | Move Location | Document Details | Scan ▾ | Import ▾ | Print List | Delete | Refresh | Holding

22 of 22 records found.   Note: Filtered columns are marked with an asterisk (*)

▾	Patient ▾	Subject ▾	Chart No	Home Phone	Work Phone	Mobile Phone	* Notation ▾	Comment
	Yarabah, Eileen	INR					Discuss	
	WAGTAIL, WILLY	FBE					Discuss	
	Smith, Jessie	INR		9123 4567			Discuss	
	SMITH, FRED	INR		9123 4567	9345 6789		Discuss	
	Huang, Ping	FBE					Discuss	
	Fothergill, Rebecca	INR					Discuss	
	DUCK, DONALD	INR					Discuss	
	Andrews, Michael	FBE		02 234 1278			Discuss	
	ANDREWS, GRAHAM JOHN	INR					Discuss	
	ANDREWS, GRAHAM JOHN	INR					Discuss	
	Andrews, Jennifer	FBE					Discuss	
	Anderson, David	INR	345	9456 2345	9123 3456		Discuss	
	ANDREWS, FRED	INR		8182 5634			Discuss	
	ANDREWS, MAUREEN	FBE	345644	8182 5634			Discuss	
	Andrews, John	INR	105	9123 4567	9345 6789		Discuss	
	BAKER, STEPHEN	HPV DNA					Discuss	
	Anderson, David	Chest xray request	345	9456 2345	9123 3456		Discuss	To see within 1 month
	HAWKES, JEFF TEST	HPV DNA					Discuss	To see within 1 month
	HAWKES, JEFF TEST	HPV DNA					Discuss	
	ANDREWS, MAUREEN	MRS MAUREEN ANDREWS	345644	8182 5634			Discuss	

To Print the List

1. Filter > Select All > Print List

2. Design an effective Results Management Practice protocol.

Who follows up your action?
Who marks results as notified?

DOCTOR CHECKS HOLDING FILE

*which may include a variety of new correspondence ie:*

- scanned documents

- electronically received pathology and radiology results

-electronically received correspondence (MDExchange, Argus, CDA documents etc)

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NO ACTION REQUIRED	RETURN URGENTLY	DISCUSS RESULT

One Protocol for the Practice is the goal!

Action

Notations

Comments

Insert notation from list

No action
Return Urgently
Discuss

Keep this list 'clean' and effective

Insert comment from list

To see me within 2 days
To see within 1 month
To see within 6 months
Under care of Specialist

OK   Cancel

DESIGN YOUR CORRESPONDENCE MANAGEMENT PROTOCOL FOR MEDICAL DIRECTOR

Discuss, design, re-evaluate. Ensure everyone trusts the procedures.

DOCTOR CHECKS HOLDING FILE

which may include a variety of new correspondence ie:

- scanned documents

- electronically received pathology and radiology results

-electronically received correspondence (MDExchange, Argus, CDA documents etc)

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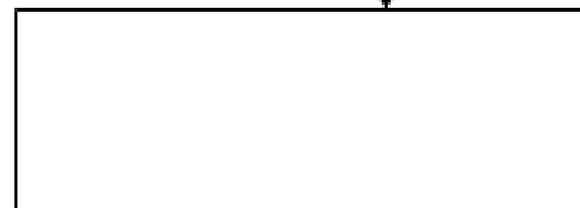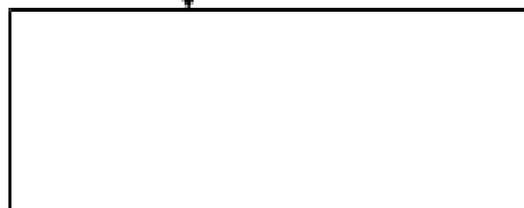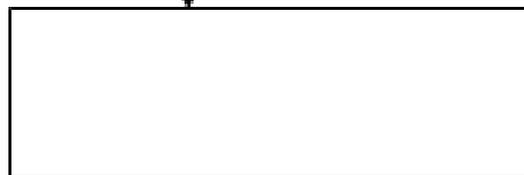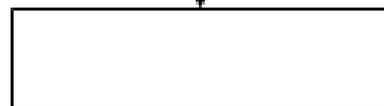
NO ACTION REQUIRED	RETURN URGENTLY	DISCUSS RESULT
	Doctor marks result as Notified	**Doctor marks result as Notified**

3. Import and scan documents and photos.

New location for scanning!

Medical Director 3.14a

| Open | File | Patient | User | Tools | Clinical | Correspondence | Search | Resources | Help |

Address Book...   Ctrl+K

Scan/Import Correspondence...

MDStats

Exit
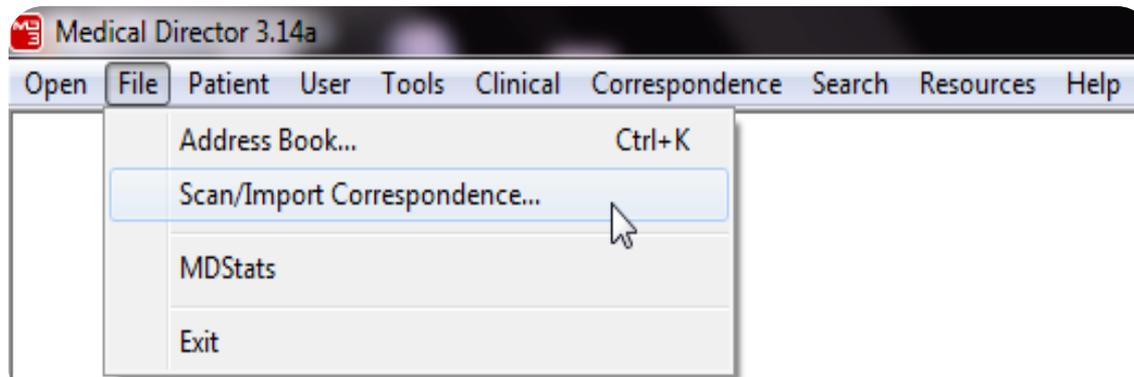
Directly into the Holding File

If document has not yet been seen:
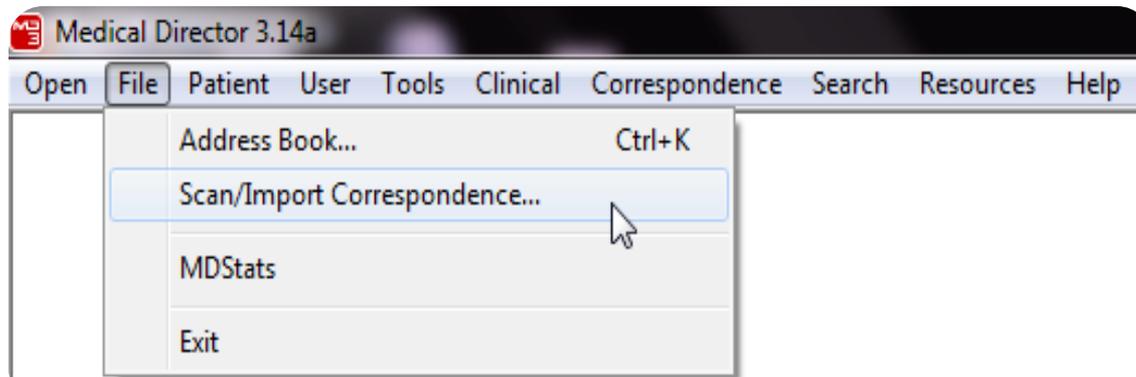
Or, if the document has been seen by the doctor:

Scan directly into Actioned Items,

Medical Director 3.14c - [Investigations Correspondence]

File   Window   Help

Preview - Off ▼ | Full Preview | Clear Filter | Move Location | Document Details | Scan ▼ | Import ▼ | Print List | Print | Delete | Refresh | Holding File

10 of 10 records found.   Note: Filtered columns are marked with an asterisk (*)

* Date Checked ▼	Checked By ▼	Date Requested ▼	Patient ▼	Notation ▼	Comment	Mobile Phone	C
30/11/2012	DR KATRINA OTTO	13/01/2011	DILLON, JOE	Discuss	To see within 1 month		34

Or the Patient Record

Scan into Results or Letters or Documents or Correspondence

You can turn the Correspondence tab off if you choose

Tools >
Options >
Clinical >

4. Update patient records from the Holding File.

5. Add patient recalls from the Holding File.

6. 'Move Location' of Documents

All Results can now be filed in the 'Results' page.

Can 'move' from:
-Holding File
-Actioned Items

*or from patient record (Results, Letters, Documents or Correspondence)*

	Subject	Description	Doctor	
	test		Dr Katrina Otto	
FRED	Holter ECG		Dr Katrina Otto	
FRED	Duodenal Ulcer		Dr Katrina Otto	
FRED	Holter ECG Report		Dr Katrina Otto	
GRAHAM JOHN	Holter ECG Report 14.5.10		Dr Katrina Otto	
GRAHAM JOHN	Chicken in Oesophagus		Dr Katrina Otto	
GRAHAM JOHN	ECG			

Move Location

Right click on document to Move Location.

7. View and Follow up Results

Vital to mark results that have been given as 'Notified' in either 'Actioned Items' or the Patient Record

Notified
Notified
Notified
Notified
Notified
Notified
Notified
Notified
Notified
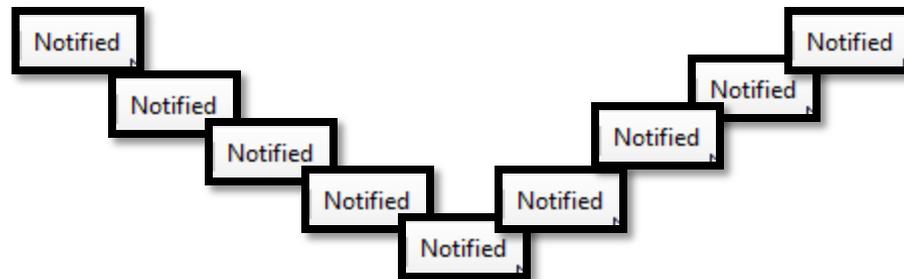
No. 1 Tip: Mark as Notified'

Notation	Comment	Date Notified	Notified By
Discuss	To see within 1 month		
Discuss	To see within 1 month		
No action			
Return Urgently	To see me within 2 days		
No action	Normal for them		
Discuss	To see within 12 months	23/11/2012	DR KATRINA OTTO
Return Urgently	To see me within 2 days		

Previous | Next | Reassign Patient | Notified | Add Recall | Print | View Signature | Audit History

Questions?

How can we help your practice?

This Webinar was brought to you by:

Katrina Otto, Train IT Medical

For upcoming Webinars - www.trainitmedical.com.au
or to suggest ideas directly to Katrina, email:
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Thanking you