



**Train IT Medical**  
Competence with Confidence



# Welcome to our Webinar

## Correspondence Management in MD3.14c

*Presented by Katrina Otto, Train IT Medical*





## 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.



**Train IT Medical**  
Competence with Confidence



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

# Correspondence Management



**Train IT Medical**  
Competence with Confidence



## 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

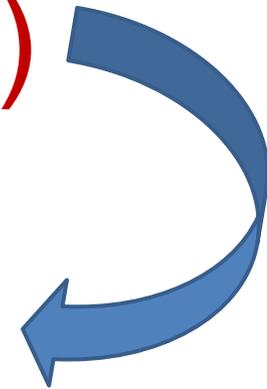


**Train IT Medical**  
Competence with Confidence



# 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	
MAUREEN ANDREWS	MRS MAUREEN ANDREWS	345644	8182 5634			Discuss	
JEFF HAWKES TEST	HPV DNA					Discuss	
JEFF HAWKES TEST	HPV DNA					Discuss	
JEFF HAWKES TEST	HPV DNA					Discuss	
STEPHEN BAKER	HPV DNA	105	9123 4567	9345 6789		Discuss	



**To Print the List**  
1. Filter > Select All > Print List



## 2. Design an effective Results Management Practice protocol.



# DESIGN YOUR CORRESPONDENCE MANAGEMENT PROTOCOL FOR MEDICAL DIRECTOR

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)

NO ACTION REQUIRED

RETURN URGENTLY

DISCUSS RESULT

[Empty box for action steps under NO ACTION REQUIRED]

[Empty box for action steps under RETURN URGENTLY]

[Empty box for action steps under DISCUSS RESULT]

[Empty box for action steps under RETURN URGENTLY]

[Empty box for action steps under DISCUSS RESULT]

[Empty box for final outcome under NO ACTION REQUIRED]

[Empty box for final outcome under RETURN URGENTLY]

[Empty box for final outcome under DISCUSS RESULT]



# One Protocol for the Practice is the goal!

**Action**

Notations

Insert notation from list

- No action
- Return Urgently
- Discuss

**Keep this list 'clean' and effective**

Comments

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:

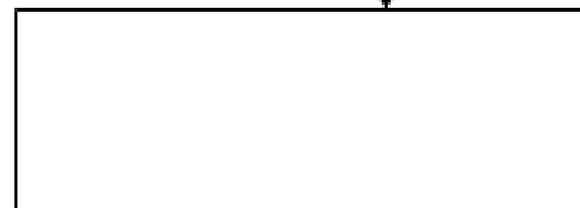
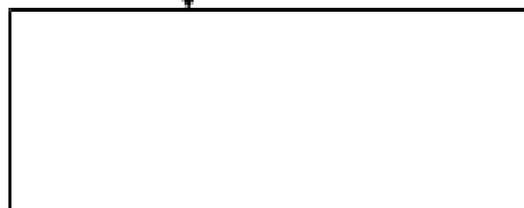
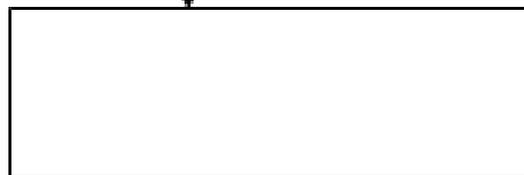
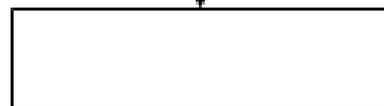
- scanned documents
- electronically received pathology and radiology results
- electronically received correspondence (MDExchange, Argus, CDA documents etc)



NO ACTION REQUIRED

RETURN URGENTLY

DISCUSS RESULT



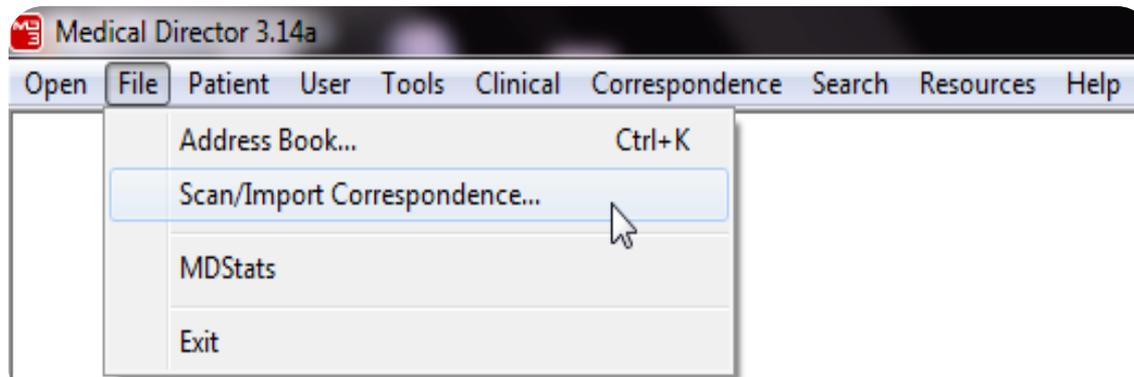
Doctor marks result as  
Notified

Doctor marks result as  
Notified



# 3. Import and scan documents and photos.

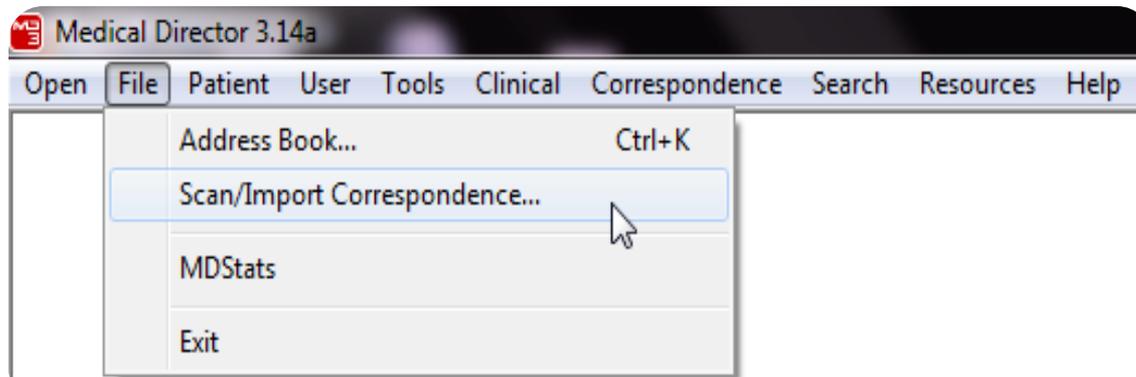
*New location for scanning!*





# 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	Cl
30/11/2012	DR KATRINA OTTO	13/01/2011	DILLON, JOE	Discuss	To see within 1 month		34



# Or the Patient Record

Medical Director 3.14c - [John Andrews]

File Patient Edit Summaries Tools Clinical Correspondence Assessment Resources Window Help

John Andrews | DOB: 17/06/1955 | 57 yrs | Occupation: Plumber | 0m 16s

2 Kennedy Rd. Demo Town. Qld 4523 | Ph: 9123 4567 (home) | Record No: 105 | IHI No: |

Allergies: **PENICILLINS** | Pension No: 1234 | ATSI: |

Warnings: **On Warfarin** | Smoking Hx: Ex-smoker

Recalls

Summary | Current Rx | Progress | Past history | **Results** | Letters | Documents | Old scripts | Imm. | **Correspondence** | MDExchange | SAT

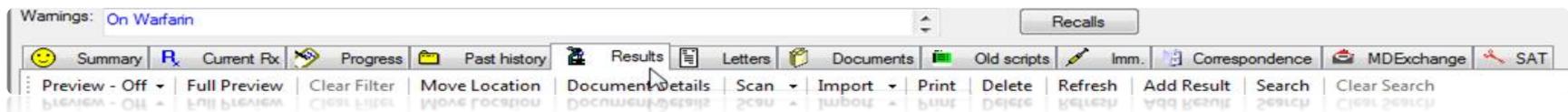
3 of 3 records found

Date Checked	Checked By	Date Collected	Date Requested	Sender/Provider	Recipient/Doctor	Subject	Description	Notation
07/11/2012	DR KATRINA OTTO	07/11/2012	07/11/2012			BLOOD GROUP		No action
10/01/2011	DR KATRINA OTTO	01/09/2006	01/09/2006	SDS PATHOLOGY	HELLO COMPUTER DEPARTMENT	INR		Discuss
10/01/2011	DR KATRINA OTTO	01/09/2006	01/09/2006	SDS PATHOLOGY	HELLO COMPUTER DEPARTMENT	INR		Return Urgently

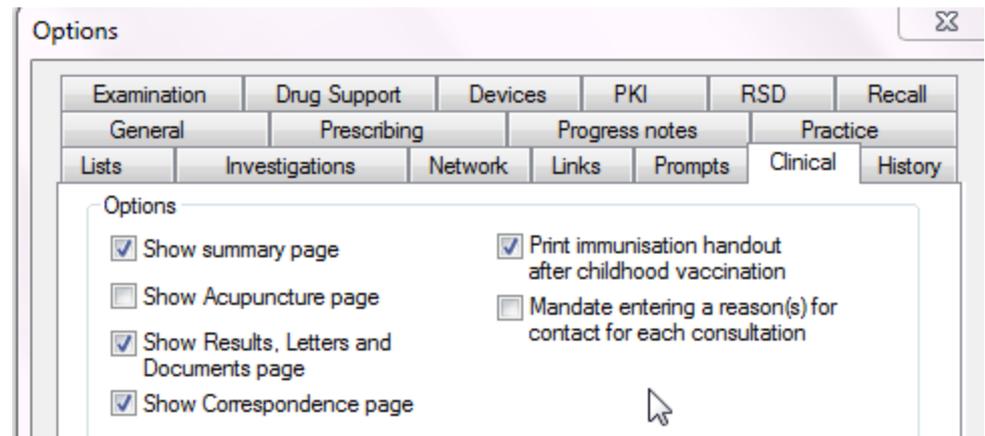
*Scan into Results or Letters or Documents or Correspondence*



# You can turn the Correspondence tab off if you choose



*Tools >*  
*Options >*  
*Clinical >*





Name: HAWKES, JEFF TEST  
Address: 10 LYON PARK RD TEST  
NORTH RYDE, 2113  
D.O.B.: 24/01/1969 Sex: F  
Medicare No:  
Lab. Reference: 04-401-001-0  
Date requested: 23/07/2004  
Addressee: HELLO COMPUTER DEPARTMENT

HPV DNA
Lab. Reference: 04-401-001-0
Requested: 23/07/2004 Complete: Final
Performed: 23/07/2004
SDS PATHOLOGY

SPECIAL TESTING Human Papilloma Virus

High Risk HPV DNA: NEGATIVE

A negative result indicates no presence of high risk HPV which suggests that cervical cytology will probably return to normal. A repeat smear and HPV test is recommended in 6 months. False negatives may occur if the collection site is contaminated by high concentrations of antifungal cream or contraceptive gel.

# 4. Update patient records from the Holding File.





# 5. Add patient recalls from the Holding File.

Medical Director 3.14a - [Holding File]

File Window Help

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

Name: HAWKES, JEFF TEST Address: 10 LYON PARK RD TEST NORTH RYDE, 2113 D.O.B.: 24/01/1969 Sex: F Medicare No: Lab. Reference: 04-401-001-0 Date requested: 23/07/2004 Addressee: HELLO COMPUTER DEPARTMENT	HPV DNA Lab. Reference: 04-401-001-0 Requested: 23/07/2004 Complete: Final Performed: 23/07/2004 SDS PATHOLOGY
---	--

SPECIAL TESTING Human Papilloma Virus

High Risk HPV DNA: NEGATIVE

A negative result indicates no presence of high risk HPV which suggests that cervical cytology will probably return to normal. A repeat smear and HPV test is recommended in 6 months. False negatives may occur if the collection site is contaminated by high concentrations of antifungal cream or contraceptive gel.

Previous | Next | Reassign Patient | Reassign Doctor | No Action | Action | **Add Recall** | Edit Patient | Open Record



# 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)*

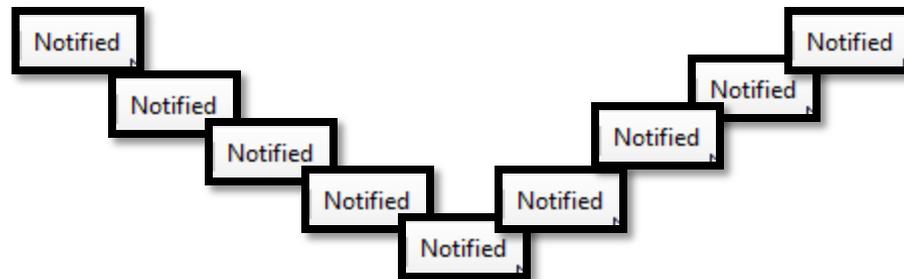
Document Details   Scan ▾   Import ▾   Print List   Print   Delete   Refresh				
	Subject	Description	Doctor	
	test		Dr Katrina Otto	
FRED	Holter ECG		Dr Katrina Otto	
FRED	Duodenal Ulcer		Dr Katrina Otto	
FRED	Holter ECG Report		Dr Katrina Otto	
GRAHAM JOHN	Holter ECG Report 14.5.10		Dr Katrina Otto	
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**





# 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



**Train IT Medical**  
Competence with Confidence



# *Questions?*

## *How can we help your practice?*



**Train IT Medical**  
Competence with Confidence



# This Webinar was brought to you by:

*Katrina Otto, Train IT Medical*

*For upcoming Webinars - [www.trainitmedical.com.au](http://www.trainitmedical.com.au)  
or to suggest ideas directly to Katrina, email:  
[katrina@trainitmedical.com.au](mailto:katrina@trainitmedical.com.au)  
or call 0424 580 286.*

*Thanking you*