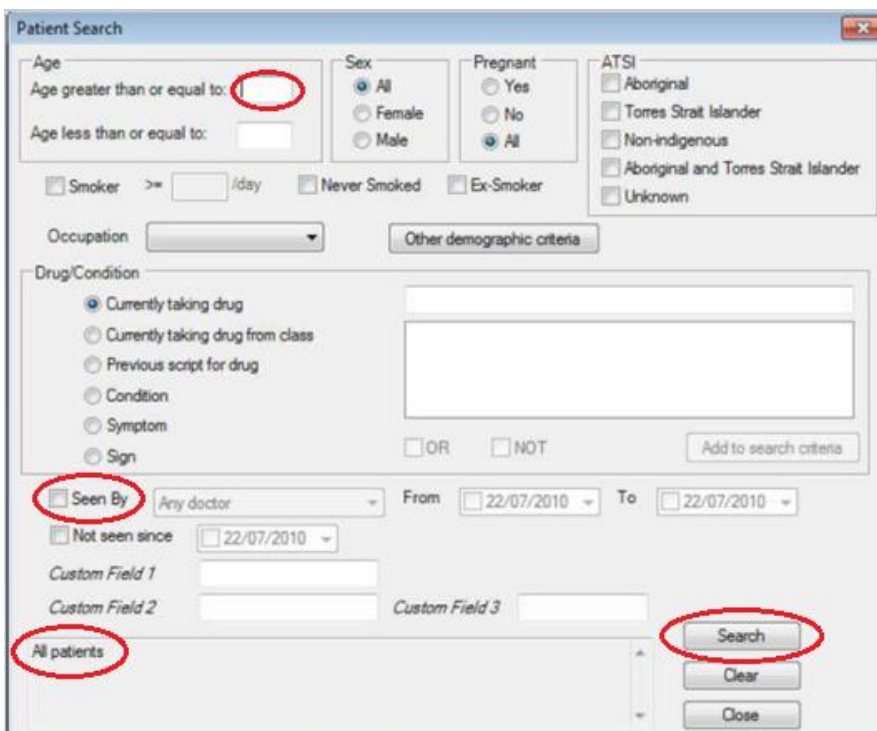


Using Medical Director for patient recall and reminders

Preparing a patient list and saving to a Recall File

Recalling patients 65 years or older:

1. Open your Medical Director software.
2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
3. In the window: 'Age greater than or equal to:' write "65".
4. Complete the 'Seen by' and the date section.
5. You can check your selected search criteria in the 'All patients' window at the bottom of the screen.
6. Click 'Search'.

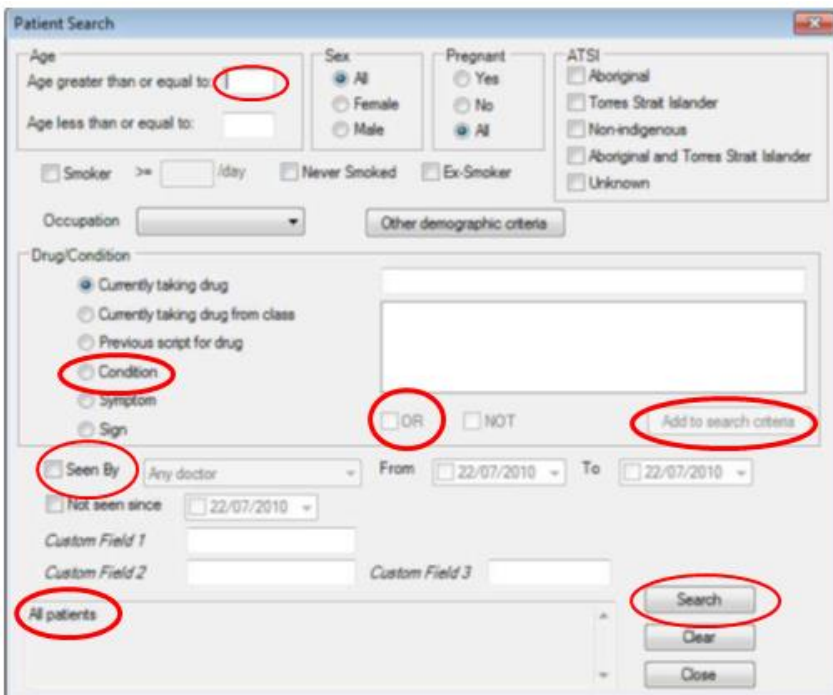


The screenshot shows the 'Patient Search' window with the following details:

- Age:** 'Age greater than or equal to:' is set to 65 (circled in red). 'Age less than or equal to:' is empty.
- Sex:** Radio buttons for 'All', 'Female', and 'Male'. 'All' is selected.
- Pregnant:** Radio buttons for 'Yes', 'No', and 'All'. 'All' is selected.
- ATSI:** Checkboxes for 'Aboriginal', 'Torres Strait Islander', 'Non-indigenous', 'Aboriginal and Torres Strait Islander', and 'Unknown'. All are unchecked.
- Smoker:** Checkboxes for 'Smoker >= /day', 'Never Smoked', and 'Ex-Smoker'. All are unchecked.
- Occupation:** A dropdown menu and a button for 'Other demographic criteria'.
- Drug/Condition:** Radio buttons for 'Currently taking drug', 'Currently taking drug from class', 'Previous script for drug', 'Condition', 'Symptom', and 'Sign'. 'Currently taking drug' is selected. There are also 'OR' and 'NOT' checkboxes and an 'Add to search criteria' button.
- Seen By:** A checkbox labeled 'Seen By' is checked (circled in red). The dropdown is set to 'Any doctor'. 'From' and 'To' date fields are both set to 22/07/2010.
- Not seen since:** A checkbox and a date field set to 22/07/2010.
- Custom Fields:** Three empty text boxes labeled 'Custom Field 1', 'Custom Field 2', and 'Custom Field 3'.
- Buttons:** 'All patients' (circled in red), 'Search' (circled in red), 'Clear', and 'Close'.

Recalling at-risk patients less than 65 years:

1. Open your Medical Director software.
2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
3. Fill in the age less than or equal to as 64.
4. Select the 'Condition' button and type in the condition you wish to search for in to the free text area (e.g. Diabetes). Refer to the Australian Immunisation Handbook (10th Ed) Chapter 4.13 for a list of eligible conditions.
5. Select 'Add to search criteria'.
6. If you would like to add more than one condition, tick the 'or' box and add another condition as for steps 4 and 5. Multiple different conditions may be added (e.g. patients \leq 64 with CHD or diabetes or COPD etc).
7. Fill in the 'Seen by' and the date section.
8. You can check your selected search criteria in the 'All patients' window at the bottom of the screen
9. Click 'Search'



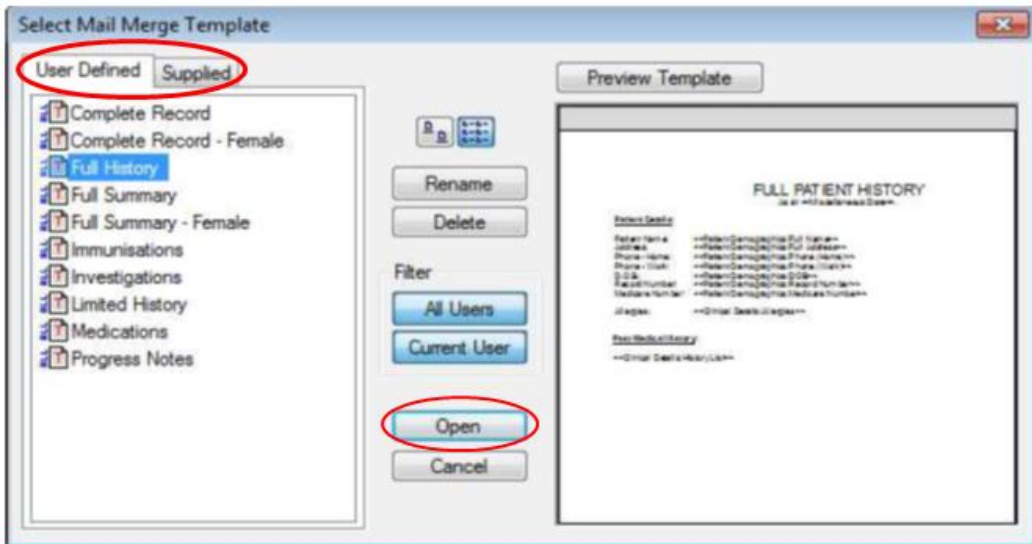
The screenshot shows the 'Patient Search' window with the following elements highlighted by red circles:

- The 'Age less than or equal to' input field.
- The 'Condition' radio button in the 'Drug/Condition' section.
- The 'OR' radio button between the 'Drug/Condition' and 'Seen By' sections.
- The 'Add to search criteria' button.
- The 'Seen By' dropdown menu.
- The 'From' and 'To' date input fields.
- The 'All patients' label at the bottom left.
- The 'Search' button at the bottom right.

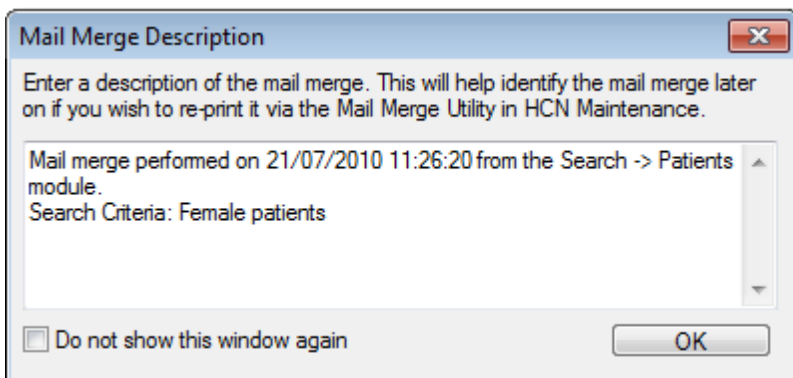
Preparing recall letter and mail merge for patient recall letters and mailing labels

Once the patient list is generated you can create a mail merge letter via the mail merge button on the patient list. Ensure you have a **template** available to act as the basis for the letters you intend to print in bulk.

1. Select the 'Mail merge' button at the bottom of the search window.
2. The 'Select Mail Merge Template' window appears.
3. Select a template from the 'User Defined' or 'Supplied' lists and click 'Open'.

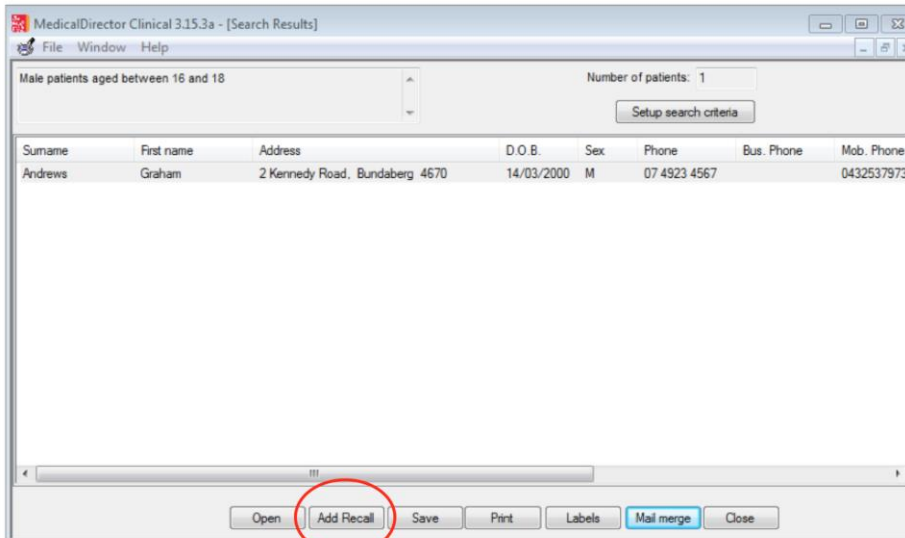


4. Medical Director begins to assemble your letters, merging the details of the patients you have selected into them. If the template you selected contains fields, you may be prompted for further information to be added to the letters.
5. The letters are automatically printed, using your current print options. A copy of the letter is added to each patient's record and can be viewed using the Letters tab on the patient's clinical window.
6. (Optional) You may be prompted to enter a description for the mail merge. In the case of a failed print run, this description can be used in conjunction with the Mail Merge Utility to help you identify which mail merge print runs need to be resumed. The Mail Merge Utility is part of the HCN Maintenance suite. For the Mail Merge Description box to appear you must enable it via 'Mail Merge Print Options'.

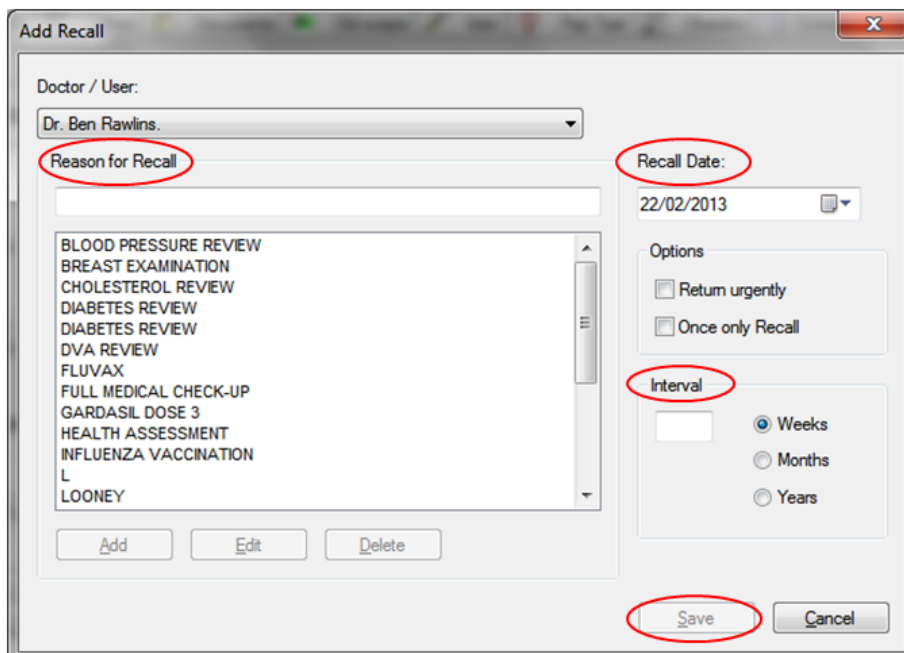


Recording patient recall 'reason' and date sent in patient records

1. Select the 'Add Recall' button at the bottom of the search results window.



2. In the 'Add Recall' window enter the 'Reason for Recall' or select a reason that is already in the scroll down menu.
3. Fill in the 'Recall Date' and the recall 'Interval' as required.
4. Once completed, select 'Save'.



Adding a reminder for when the next vaccination is due

When a patient attends for immunisation, mark the recall as complete and enter a new reminder for when the patient next requires immunising as above. This will enable an easy recall for the following year.

This tips sheet is intended for use as a guide only, with the information based on the medical practice software version available as of August 2016. There may be other procedures and/or considerations relevant to this tips sheet that may not have been taken into account. Any use of this tips sheet available on www.communityimmunity.com.au is at the user's own risk and Seqirus (Australia) Pty Ltd will not be responsible for any actions taken based on the use of this tips sheet. To the extent permitted by law, Seqirus (Australia) Pty Ltd excludes all liability arising howsoever from the use of this tips sheet.