

Using Medical Director for patient recall and reminders

Preparing a patient list and saving to a Recall File

Recalling male patients aged 16 to 18 years:

- 1. Open your Medical Director software.
- 2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
- 3. In the age window: 'Age greater than or equal to: type "16".
- 4. In the age window: 'Age less than or equal to: type "18".
- 5. Select 'Sex' as 'Male'.
- 6. Complete the 'Seen by' and the date section.
- 7. You can check your selected search criteria in the 'All patients' window at the bottom of the screen.
- 8. Click 'Search'.

Age 💦	Sex	Pregnant	ATSI
age greater than or equal to: 16	⊘ All	🕐 Yes	C Aboriginal
	Female	🔿 No	Torres Strait Islander
ge less than or equal to: 18	Male	All	Non-indigenous
Constant Se (day	Never Smoked	Ev. Smokor	Aboriginal and Torres Strait Islande
		DC-SITIOKEI	Unknown
Occupation	Other der	mographic criteria	
Drug/Condition		- 7. - 16	_
 Currently taking drug 			
Currently taking drug from classical drug f	ass		
Currently taking drug from cl Previous script for drug	ass		
 Currently taking drug from cl Previous script for drug Condition 	ass		
 Currently taking drug from cl Previous script for drug Condition Symptom 	ass		
 Currently taking drug from cl Previous script for drug Condition Symptom Sign 	ass □OR		Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign 	ass		Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign 	ass	NOT	Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign 	ass OR From 10	NOT 22/07/2010	Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign 	ass	NOT 22/07/2010	Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign Seen By Any doctor Not seen since 22/07/20 Custom Field 1 Custom Field 2	ass	NOT 22/07/2010	Add to search criteria
 Currently taking drug from cl Previous script for drug Condition Symptom Sign Seen By Any doctor Not seen since 22/07/20 Custom Field 1 Custom Field 2	ass	NOT 22/07/2010	Add to search criteria
Currently taking drug from cl Currently taking drug from cl Previous script for drug Condition Symptom Sign Seen By Any doctor Not seen since 22/07/20 <i>Custom Field 1</i> <i>Custom Field 2</i>	ass	NOT 22/07/2010	Add to search criteria To 22/07/2010



Recalling male patients aged 16 to 26 years:

- 1. Open your Medical Director software.
- 2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
- 3. In the age window: 'Age greater than or equal to: type "16".
- 4. In the age window: 'Age less than or equal to: type "26".
- 5. Select 'Sex' as 'Male'.
- 6. Complete the 'Seen by' and the date section.
- 7. You can check your selected search criteria in the 'All patients' window at the bottom of the screen.
- 8. Click 'Search'.

Patient Search		×
Age Age greater than or equal to: 16 Age less than or equal to: 26 Smoker >= /day Never Set	All Pregnant Eemale No Male All moked Ex-Smoker	ATSI Aboriginal Torres Strait Islander Non-indigenous Aboriginal and Torres Strait Islander Unknown
Occupation 👻	Other demographic criteria	
Drug/Condition Currently taking drug Currently taking drug from class Previous script for drug Condition Symptom Sign	 ORNOT	Add to search criteria
Seen By Any doctor Not seen since 22/07/2010	From 22/07/2010	▼ To 22/07/2010 ▼
Custom Field 1 Custom Field 2	Custom Field 3	
All patients		Clear + Close



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'.

Ger Defined Supplied Supplied Complete Record Complete Record - Female Ful History Ful Summary Ful Summary Ful Summary Immunisations Immunisations Medications Progress Notes	Rename Delete Fiter Al Users Current User	Preview Template
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- 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 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. For each patient you will need to go to the clinical menu.
- 2. Open 'Recall/actions' in the drop down menu.
- 3. In the 'Add Recall' window enter the 'Reason for Recall' or select a reason that is already in the scroll down menu.
- 4. Fill in the 'Recall Date' and the recall 'Interval' as required.
- 5. Once completed, select 'Save'.

Dr. Ben Rawlins. Reason for Recall		2013
BLOOD PRESSURE REVIEW BREAST EXAMINATION CHOLESTEROL REVIEW DIABETES REVIEW DIABETES REVIEW DVA REVIEW FLUVAX FULL MEDICAL CHECK-UP GARDASIL DOSE 3 REALTH ASSECTMENT INFLUENZA VACCINATION L LOONEY Add Edit Delete	Option Re Or Interva	s etum urgently nce only Recall

Adding a reminder for when the next immunisation 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 March 2013. 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 <u>www.communityimmunity.com.au</u> 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.