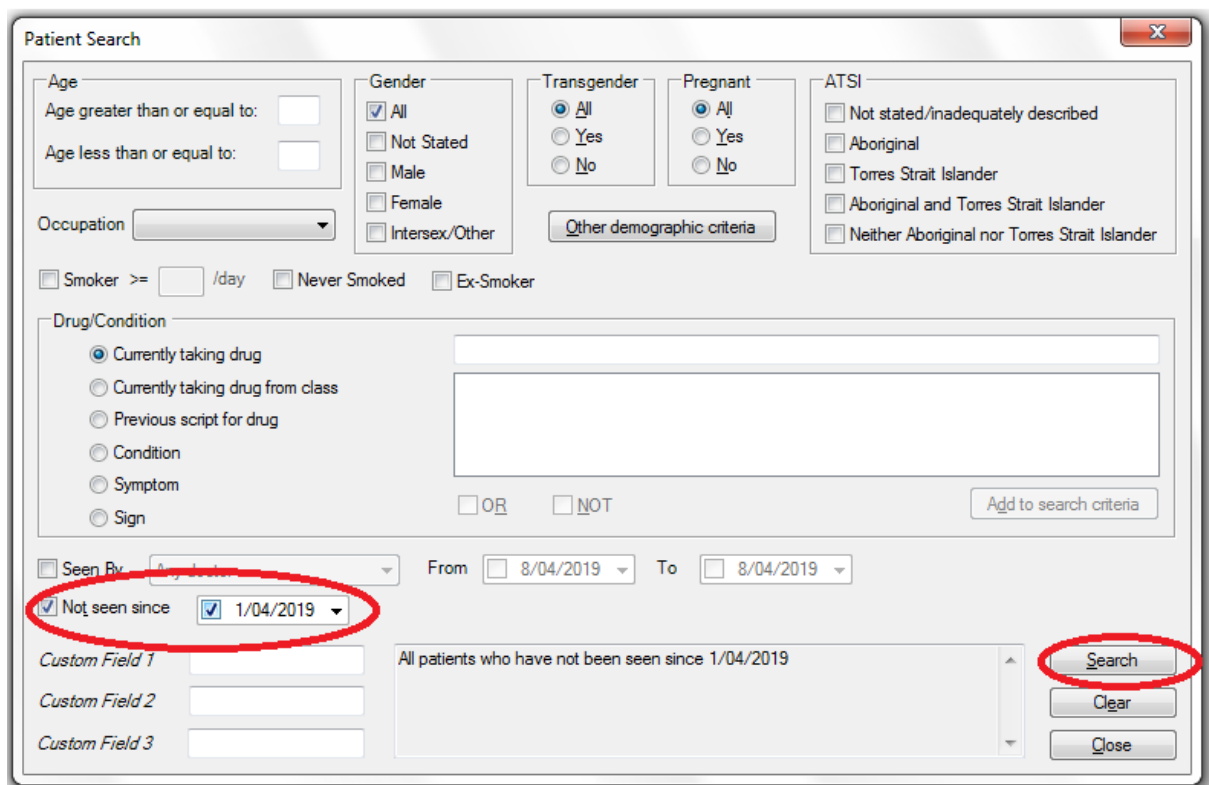


How to Guide:
Data Cleansing Using
Medical Director Software

How to Inactivate Patients

1. Bulk inactivation

- Ensure no patient files open
- From main menu, click 'Search' > 'patients'
- Tick "Not seen since" > Enter a date > click 'search'



Patient Search

Age: Age greater than or equal to: / Age less than or equal to:

Gender: All Not Stated Male Female Intersex/Other

Transgender: All Yes No

Pregnant: All Yes No

ATSI: Not stated/inadequately described Aboriginal Torres Strait Islander Aboriginal and Torres Strait Islander Neither Aboriginal nor Torres Strait Islander

Occupation:

Smoker: Smoker >= /day Never Smoked Ex-Smoker

Drug/Condition: Currently taking drug Currently taking drug from class Previous script for drug Condition Symptom Sign

OR NOT

Seen By: From: 8/04/2019 To: 8/04/2019

Not seen since 1/04/2019

Custom Field 1: Custom Field 2: Custom Field 3:

All patients who have not been seen since 1/04/2019

MedicalDirector Clinical 3.17.3a - [Search Results]

File Window Help

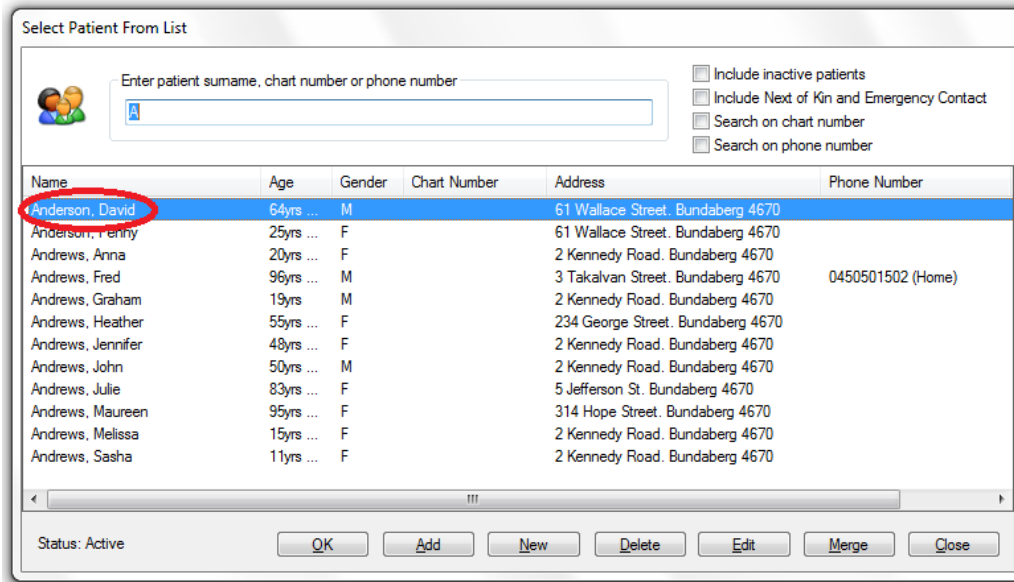
All patients who have not been seen since 1/04/2019

Number of patients: 14

Surname	First name	Address	Preferred Address	D.O.B.	Gender	Transgender	Phone	Bus. Phone	Mob. Phone	Medicare No.	Pension No.	Chart No.
Andrews	Heather	234 George Street, Bundaberg QLD 4...	Residential	12/05/1963	F	N				3500265121	4135-8999-J	
Andrews	Fred	3 Takalvan Street, Bundaberg QLD 4...	Residential	23/02/1923	M	N	0450501502			2294724171		
Duck	Donald	12 Disney Street, Disneyland	Residential	20/12/2011	M	N				3500265121		
Andrews	Julie	5 Jefferson St, Bundaberg QLD 4670	Residential	03/03/1936	F	N				6500225221	513-456-944A	
Anderson	Penny	61 Wallace Street, Bundaberg QLD 4...	Residential	04/07/1993	F	N				6288253443		
Andrews	Maureen	314 Hope Street, Bundaberg QLD 4670	Residential	23/06/1923	F	N				2294724171	561-388-922-HL	
Andrews	Jennifer	2 Kennedy Road, Bundaberg QLD 46...	Residential	20/04/1970	F	N				3500265121		
Andrews	Anna	2 Kennedy Road, Bundaberg QLD 46...	Residential	04/08/1998	F	N				3500265121		
Andrews	Graham	2 Kennedy Road, Bundaberg QLD 46...	Residential	14/03/2000	M	N				3500265121		
Andrews	Melissa	2 Kennedy Road, Bundaberg QLD 46...	Residential	04/11/2003	F	N				3500265121		
Andrews	Sasha	2 Kennedy Road, Bundaberg QLD 46...	Residential	12/07/2007	F	N				3500265121		
Andrews	John	2 Kennedy Road, Bundaberg QLD 46...	Residential	17/06/1968	M	N				3500265121		
Schein	Carolina	1 False Street, Bundaberg QLD 4670	Residential	29/02/1972	F	N				2415523356		
Watland	Henry	1 Long Terrace, Bundaberg QLD 4670	Residential	29/02/1972	M	N				3372248725		

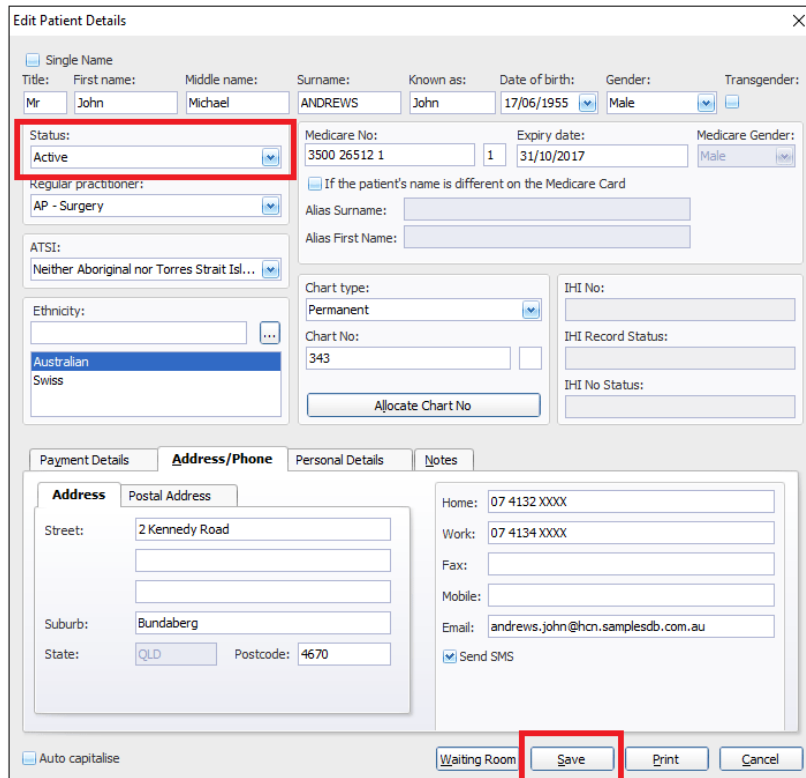
2. How to inactivate a patient individually¹

- Select Patient > Search Patient (or press F2).
- Locate the patient whose record you wish to flag as inactive as seen below.



Name	Age	Gender	Chart Number	Address	Phone Number
Anderson, David	64yrs ...	M		61 Wallace Street, Bundaberg 4670	
Anderson, Penny	25yrs ...	F		61 Wallace Street, Bundaberg 4670	
Andrews, Anna	20yrs ...	F		2 Kennedy Road, Bundaberg 4670	
Andrews, Fred	96yrs ...	M		3 Takalvan Street, Bundaberg 4670	0450501502 (Home)
Andrews, Graham	19yrs	M		2 Kennedy Road, Bundaberg 4670	
Andrews, Heather	55yrs ...	F		234 George Street, Bundaberg 4670	
Andrews, Jennifer	48yrs ...	F		2 Kennedy Road, Bundaberg 4670	
Andrews, John	50yrs ...	M		2 Kennedy Road, Bundaberg 4670	
Andrews, Julie	83yrs ...	F		5 Jefferson St, Bundaberg 4670	
Andrews, Maureen	95yrs ...	F		314 Hope Street, Bundaberg 4670	
Andrews, Melissa	15yrs ...	F		2 Kennedy Road, Bundaberg 4670	
Andrews, Sasha	11yrs ...	F		2 Kennedy Road, Bundaberg 4670	

- Select the patient and then click “Edit”. The Edit Patient Details window will appear.

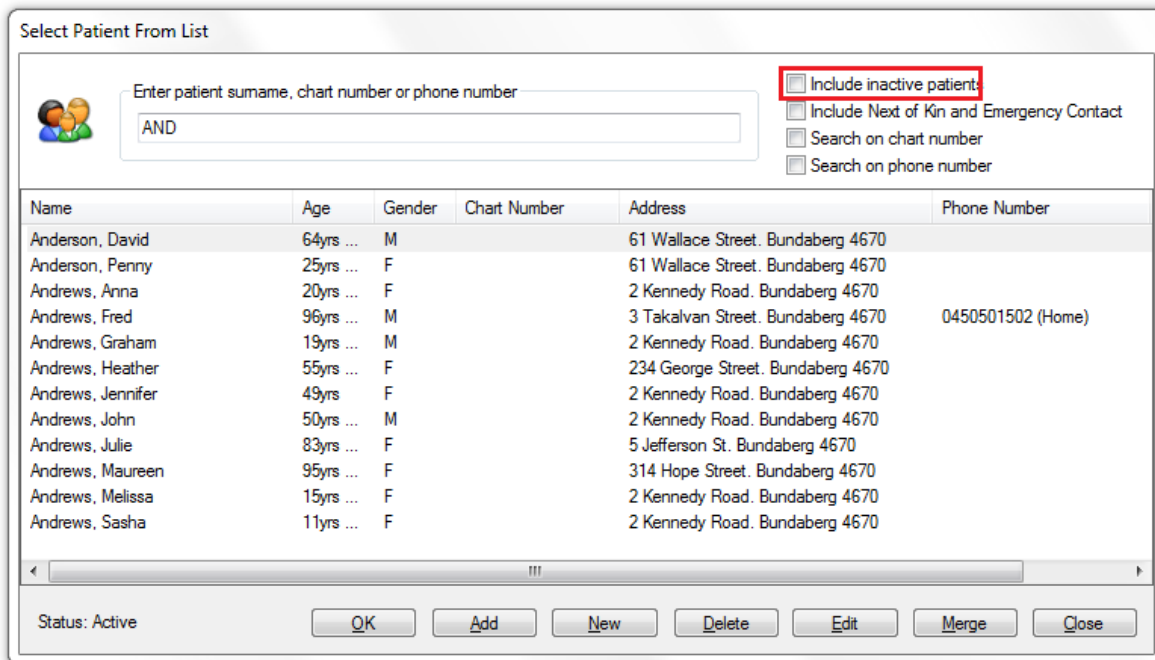


¹ <https://www.medicaldirector.com/help/>

- d) From the Status drop-down menu select 'Inactive'.
- e) Click 'save' to confirm

To Activate Inactive Patients²

1. Select **Patient > Search Patient** (or Press F2). The **Search Patient** window appears.



Name	Age	Gender	Chart Number	Address	Phone Number
Anderson, David	64yrs ...	M		61 Wallace Street. Bundaberg 4670	
Anderson, Penny	25yrs ...	F		61 Wallace Street. Bundaberg 4670	
Andrews, Anna	20yrs ...	F		2 Kennedy Road. Bundaberg 4670	
Andrews, Fred	96yrs ...	M		3 Takalvan Street. Bundaberg 4670	0450501502 (Home)
Andrews, Graham	19yrs ...	M		2 Kennedy Road. Bundaberg 4670	
Andrews, Heather	55yrs ...	F		234 George Street. Bundaberg 4670	
Andrews, Jennifer	49yrs	F		2 Kennedy Road. Bundaberg 4670	
Andrews, John	50yrs ...	M		2 Kennedy Road. Bundaberg 4670	
Andrews, Julie	83yrs ...	F		5 Jefferson St. Bundaberg 4670	
Andrews, Maureen	95yrs ...	F		314 Hope Street. Bundaberg 4670	
Andrews, Melissa	15yrs ...	F		2 Kennedy Road. Bundaberg 4670	
Andrews, Sasha	11yrs ...	F		2 Kennedy Road. Bundaberg 4670	

2. Tick the "Include inactive patient" check box to display the inactive patient.
3. Locate the patient whose record you wish to reactivate.
4. Within the Select Patient window, select the patient and then click "Edit". The Edit Patient Details window appears.

² <https://www.medicaldirector.com/help/>

Edit Patient Details [X]

Single Name

Title: First name: Middle name: Surname: Known as: Date of birth: Gender: Transgender:

Mr John Michael ANDREWS John 17/06/1955 Male

Status: Active

Regular practitioner: AP - Surgery

ATSI: Neither Aboriginal nor Torres Strait Isl...

Ethnicity: ...

Australian

Swiss

Medicare No: 3500 26512 1 Expiry date: 31/10/2017 Medicare Gender: Male

If the patient's name is different on the Medicare Card

Alias Surname:

Alias First Name:

Chart type: Permanent

Chart No: 343

IHI No:

IHI Record Status:

IHI No Status:

Payment Details **Address/Phone** Personal Details Notes

Address Postal Address

Street: 2 Kennedy Road

Suburb: Bundaberg

State: QLD Postcode: 4670

Home: 07 4132 XXXX

Work: 07 4134 XXXX

Fax:

Mobile:

Email: andrews.john@hcn.samplesdb.com.au

Send SMS

Auto capitalise

5. From the Status drop-down menu select Active.
6. Click "Save" to confirm. This patient is made active.

How to View Inactive Patients

From the main screen > Patient > Select "Open" > in Search, click on inactive check box to display the inactive patient.

Select Patient From List

Enter patient surname, chart number or phone number

Include inactive patients
 Include Next of Kin and Emergency Contact
 Search on chart number
 Search on phone number

Name	Age	Gender	Chart Number	Address	Phone Number
Anderson, David	64yrs ...	M		61 Wallace Street. Bundaberg 4670	
Anderson, Penny	25yrs ...	F		61 Wallace Street. Bundaberg 4670	
Andrews, Anna	20yrs ...	F		2 Kennedy Road. Bundaberg 4670	
Andrews, Fred	96yrs ...	M		3 Takalvan Street. Bundaberg 4670	0450501502 (Home)
Andrews, Graham	19yrs ...	M		2 Kennedy Road. Bundaberg 4670	
Andrews, Heather	55yrs ...	F		234 George Street. Bundaberg 4670	
Andrews, Jennifer	49yrs ...	F		2 Kennedy Road. Bundaberg 4670	
Andrews, John	50yrs ...	M		2 Kennedy Road. Bundaberg 4670	
Andrews, Julie	83yrs ...	F		5 Jefferson St. Bundaberg 4670	
Andrews, Maureen	95yrs ...	F		314 Hope Street. Bundaberg 4670	
Andrews, Melissa	15yrs ...	F		2 Kennedy Road. Bundaberg 4670	
Andrews, Sasha	11yrs ...	F		2 Kennedy Road. Bundaberg 4670	

Status: Active

OK Add New Delete Edit Merge Close

How to Merge Patient Records in Clinical³

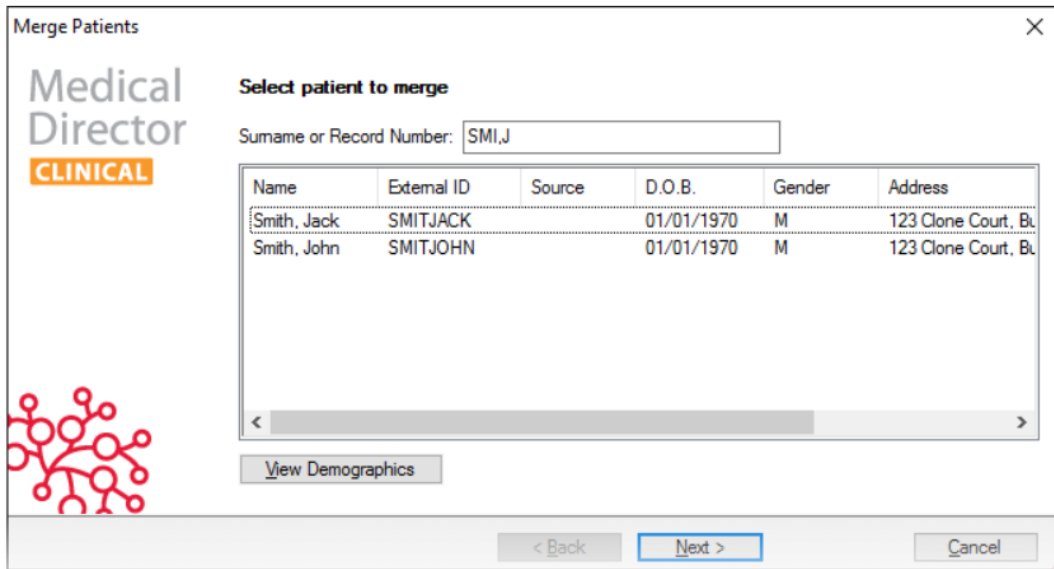
Warning: It is highly recommended that you perform a backup of your Clinical data before commencing any work on your data. A patient merge cannot be reversed. When merging patient records, it is essential that you are diligent when selecting and confirming the records to be merged.

Steps

- a) Select Patient > Open
- b) The Select Patient from List window appears

³ <https://www.medicaldirector.com/help/>

- c) Locate and select one of the two patient records (the primary patient) you wish to merge.



Merge Patients

Medical Director
CLINICAL

Select patient to merge

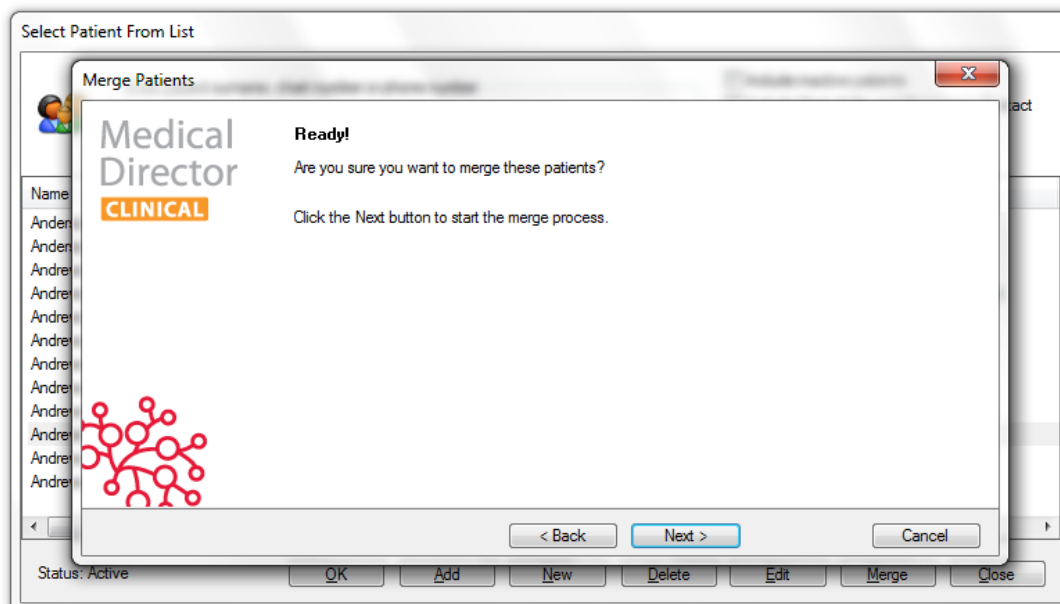
Surname or Record Number: SMI,J

Name	External ID	Source	D.O.B.	Gender	Address
Smith, Jack	SMITJACK		01/01/1970	M	123 Clone Court, Bl
Smith, John	SMITJOHN		01/01/1970	M	123 Clone Court, Bl

View Demographics

< Back Next > Cancel

- d) Click on Merge > The Merge Patients wizard appears.
- Note: The patient's External ID number, Date of Birth, and Address are listed to assist with identification.
- e) Select the second patient to merge from the list.
- f) Select the patient that you wish to keep.
- g) Click Next > you are prompted to confirm that you are ready to merge to the patient records.



Select Patient From List

Merge Patients

Medical Director
CLINICAL

Ready!

Are you sure you want to merge these patients?

Click the Next button to start the merge process.

< Back Next > Cancel

Status: Active OK Add New Delete Edit Merge Close

h) To complete the merge process> Click finish

Note:

(Optional) Use the Source field to see where the secondary patient record has come from. This assists you in determining exactly which patient record you need to keep. The following options may be present:

Billing - If the second patient has come from a billing package.

External - If the second patient was imported from another file (perhaps from another surgery).

Locum - If the second patient was imported using a third-party locum service.

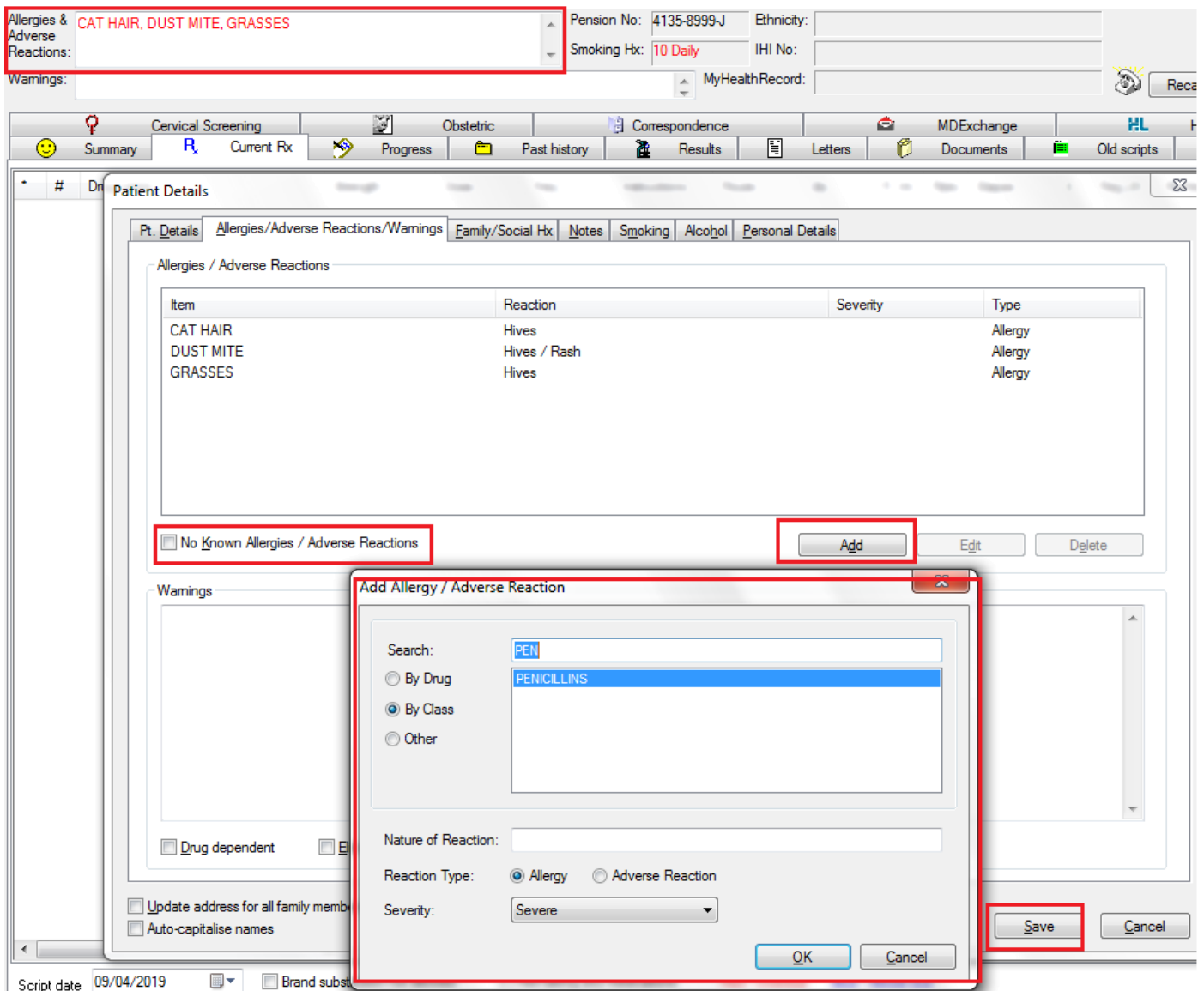
Medical Director Clinical - If the second patient was originally created in Clinical.

Pathology - If the second patient was created automatically upon importing Investigation Results; if you import results for a patient that doesn't exist in your patient database, Clinical will automatically add the patient to the Patient Database.

View demographics button to open a window of more-detailed demographic information for the selected patient.

How to Record Allergies

- a) From the patient file, Double click on Allergies/Adverse Reactions.
- If the patient has no “No Known Allergies/Adverse Reactions < Tick this this option.
 - If the patient has known Allergies > Click add > Add Allergy / Adverse Reaction > Choose one of the following:
 Search by Drug / By Class / Other
 > Describe the nature of the reaction > indicate the type of reaction > Indicate the Severity of the reaction > Click Ok, then > Click Save



Pension No: 4135-8999-J Ethnicity:
Smoking Hx: 10 Daily IHI No:
MyHealthRecord:

Summary Current Rx Progress Past history Results Letters Documents Old scripts

Patient Details

Pt. Details Allergies/Adverse Reactions/Warnings Family/Social Hx Notes Smoking Alcohol Personal Details

Allergies / Adverse Reactions

Item	Reaction	Severity	Type
CAT HAIR	Hives		Allergy
DUST MITE	Hives / Rash		Allergy
GRASSES	Hives		Allergy

No Known Allergies / Adverse Reactions Add Edit Delete

Warnings

Drug dependent Update address for all family members Auto-capitalise names

Script date 09/04/2019 Brand subst

Add Allergy / Adverse Reaction

Search: PEN
PENICILLINS

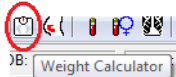
By Drug By Class Other

Nature of Reaction:
Reaction Type: Allergy Adverse Reaction
Severity: Severe

OK Cancel Save Cancel

How to Calculate Weight, Record Height, Waist and Blood Pressure

- a) To record Weight, Height, Waist and Blood Pressure from the patient file:
Go to Weight Tab > Click on Weight Calculator > Record Measurements: Height, Weight, BMI, Waist, Hip > then Click Save



Tool Box

Weight Calculator

Date: 9/04/2019 Time: 12:29:20 PM Gender: Female Age: 55 Height: 170 Patient ID: 3

Blood Glucose | Blood Pressure | CV Risk | ECG | INR | Renal Function | Respiratory | **Weight**

Data Graph

View: All

Current Measurements

Height: (cm)

Weight: (kg)

BMI:

Waist: (cm)

Hip: (cm)

Waist/Hip Ratio:

Weight must be greater than 10Kg for BMI calculation.

Date	Time	Type	Value
24/02/2011	10:51:00	Weight	57.9
24/02/2011	10:51:00	BMI	20
24/02/2011	10:51:00	Waist	81
10/05/2011	15:56:57	Height	170
10/05/2011	15:56:57	Weight	56
10/05/2011	15:56:57	BMI	19.4
10/05/2011	15:56:57	Waist	80
22/10/2011	13:35:00	Height	170
22/10/2011	13:35:00	Weight	57.2
22/10/2011	13:35:00	BMI	19.8
22/10/2011	13:35:00	Waist	81
12/07/2012	09:09:00	Height	170
12/07/2012	09:09:00	Weight	58
12/07/2012	09:09:00	BMI	20.1
12/07/2012	09:09:00	Waist	81
18/02/2013	15:44:59	Height	170
18/02/2013	15:44:59	Weight	55
18/02/2013	15:44:59	BMI	19.0
18/02/2013	15:44:59	Waist	81
10/04/2013	15:55:58	Height	170
10/04/2013	15:55:58	Weight	55
10/04/2013	15:55:58	BMI	19.0
10/04/2013	15:55:58	Waist	81

Clear

Print Reference Edit View Save Close

- b) To Records Blood Pressure, Click on Blood Pressure Tab > Insert Manual or get BP readings from device > Click Save.

Tool Box X

Blood Pressure

Date: 9/04/2019 Time: 12:29:20 PM Gender: Female Age: 55 Height: 170 Patient ID: 3

Current Measurements View: All

Blood Pressure

Cuff Location: Unspecified

Systolic / Diastolic Pulse

Sitting:

Standing:

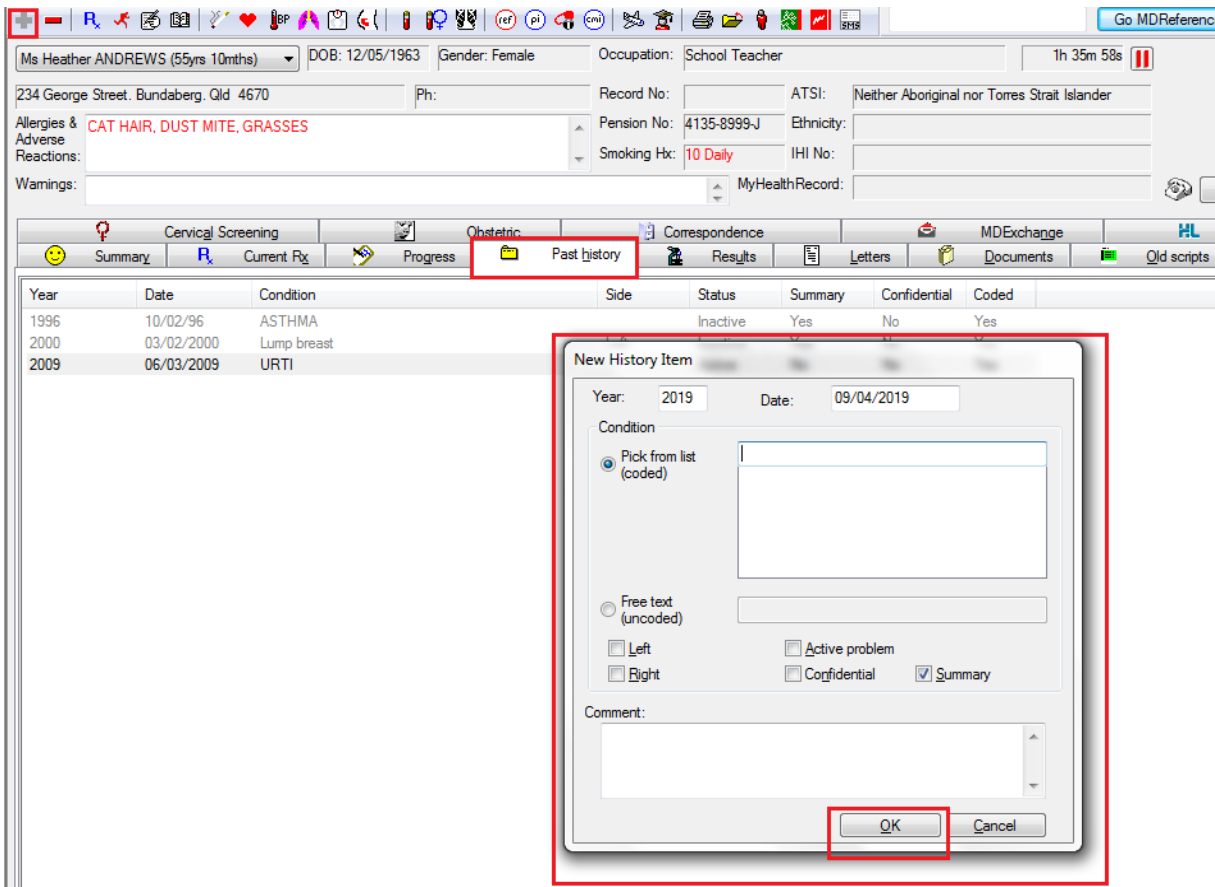
Lying:

Date	Time	Location	Type	BP	Pulse	Rhyth
07/08/2006	11:11:00	Unspecif...	Sitting	130/80	82	
07/12/2006	09:13:00	Unspecif...	Sitting	130/90	82	
29/03/2007	08:31:00	Unspecif...	Sitting	130/90	82	
19/06/2007	11:15:00	Unspecif...	Sitting	130/90		
14/01/2008	08:31:00	Unspecif...	Sitting	130/90		
14/04/2008	08:31:00	Unspecif...	Sitting	120/70		
14/01/2009	08:31:00	Unspecif...	Sitting	141/87	87	
20/09/2009	11:42:00	Unspecif...	Sitting	160/99		
01/11/2009	10:49:00	Unspecif...	Sitting	137/90	81	
27/04/2010	15:57:47	Unspecif...	Sitting	120/75	60	
17/07/2010	11:29:00	Unspecif...	Sitting	130/90		
04/09/2010	10:19:00	Unspecif...	Sitting	110/60	60	
07/10/2010	13:33:00	Unspecif...	Sitting	115/70	68	
11/11/2010	10:24:00	Unspecif...	Sitting	120/70	60	
30/12/2010	09:24:00	Unspecif...	Sitting	110/70		
04/01/2011	17:31:00	Unspecif...	Sitting	120/80	60	
24/02/2011	10:49:00	Unspecif...	Sitting	120/80	60	
24/02/2011	10:51:00	Unspecif...	Sitting	130/85	60	
10/05/2011	15:56:57	Unspecif...	Sitting	120/80	60	
22/10/2011	13:35:00	Unspecif...	Sitting	120/80	60	
12/07/2012	09:09:00	Unspecif...	Sitting	115/85	60	
18/02/2013	15:44:59	Unspecif...	Sitting	120/80	60	

How to Enter a Coded Diagnosis

1. To add in a coded diagnosis in Past History

- a) From patient file > go to Past history > Click on '+'
- b) From Condition > Pick up from list "coded diagnosis"



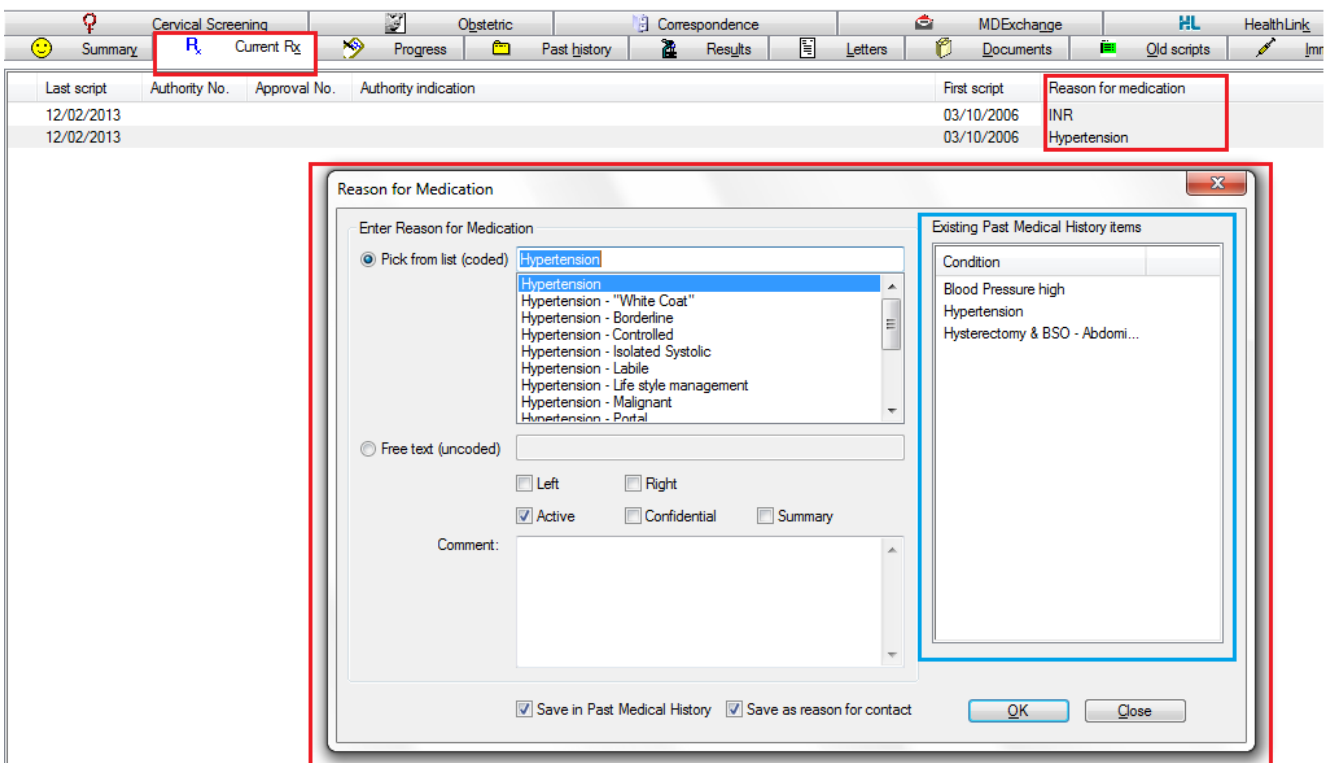
The screenshot shows a medical software interface for a patient named Ms Heather ANDREWS (55yrs 10mths). The patient's details include DOB: 12/05/1963, Gender: Female, Occupation: School Teacher, and Address: 234 George Street, Bundaberg, Qld 4670. The 'Allergies & Adverse Reactions' section lists CAT HAIR, DUST MITE, GRASSES. The 'Past history' tab is selected, and a 'New History Item' dialog box is open. The dialog box shows the year 2019 and date 09/04/2019. The 'Condition' section has 'Pick from list (coded)' selected, with a text input field below it. There are also options for 'Free text (uncoded)', 'Left', 'Right', 'Active problem', 'Confidential', and 'Summary' (checked). A 'Comment' field is at the bottom, and 'OK' and 'Cancel' buttons are at the bottom right.

Year	Date	Condition	Side	Status	Summary	Confidential	Coded
1996	10/02/96	ASTHMA		Inactive	Yes	No	Yes
2000	03/02/2000	Lump breast					
2009	06/03/2009	URTI					

How to add a coded diagnosis while adding a prescribed medication

Steps

- From patient file > Current Rx tab > Click on Reason for Medication >
- Pick from list (coded) > Select the reason for medication from the list >
- Save in Existing Past Medical items > Click Ok

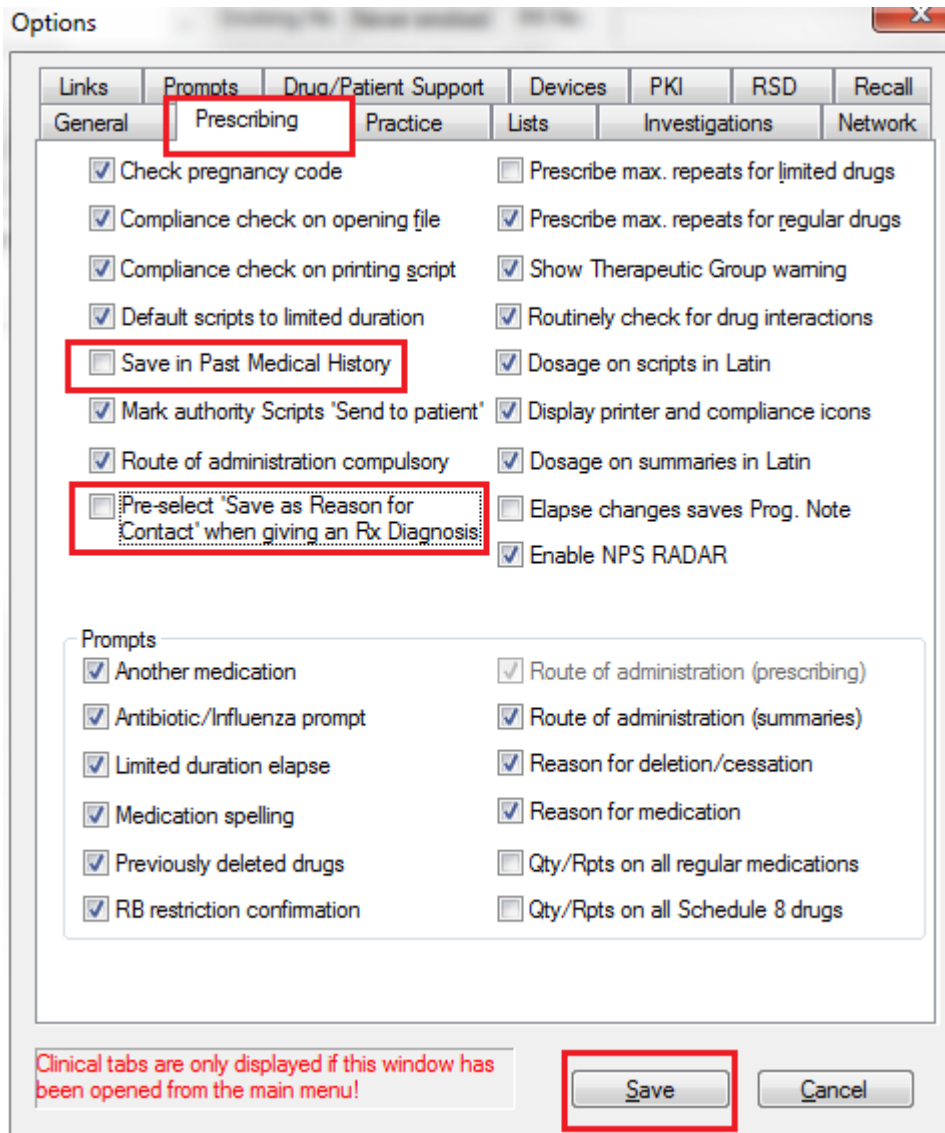


Last script	Authority No.	Approval No.	Authority indication	First script	Reason for medication
12/02/2013				03/10/2006	INR
12/02/2013				03/10/2006	Hypertension

Note: when the condition is not in the list, select the condition that closest match and use the comment box to fill in details.

To avoid duplicate conditions in past history while prescribing medications

From main screen, Tools > Options > Select Prescribing tab > Untick “Save in past medical history” & untick “Preselect Save as reason for contact” > Save.



The screenshot shows the 'Options' dialog box with the 'Prescribing' tab selected. The 'Save in Past Medical History' checkbox is unselected and highlighted with a red box. The 'Pre-select 'Save as Reason for Contact' when giving an Rx Diagnosis' checkbox is also unselected and highlighted with a red box. The 'Save' button at the bottom right is highlighted with a red box. A red text box at the bottom left states: 'Clinical tabs are only displayed if this window has been opened from the main menu!'.

Links	Prompts	Drug/Patient Support	Devices	PKI	RSD	Recall
General	Prescribing	Practice	Lists	Investigations	Network	
<input checked="" type="checkbox"/> Check pregnancy code	<input type="checkbox"/> Prescribe max. repeats for limited drugs					
<input checked="" type="checkbox"/> Compliance check on opening file	<input checked="" type="checkbox"/> Prescribe max. repeats for regular drugs					
<input checked="" type="checkbox"/> Compliance check on printing script	<input checked="" type="checkbox"/> Show Therapeutic Group warning					
<input checked="" type="checkbox"/> Default scripts to limited duration	<input checked="" type="checkbox"/> Routinely check for drug interactions					
<input type="checkbox"/> Save in Past Medical History	<input checked="" type="checkbox"/> Dosage on scripts in Latin					
<input checked="" type="checkbox"/> Mark authority Scripts 'Send to patient'	<input checked="" type="checkbox"/> Display printer and compliance icons					
<input checked="" type="checkbox"/> Route of administration compulsory	<input checked="" type="checkbox"/> Dosage on summaries in Latin					
<input type="checkbox"/> Pre-select 'Save as Reason for Contact' when giving an Rx Diagnosis	<input type="checkbox"/> Elapse changes saves Prog. Note					
	<input checked="" type="checkbox"/> Enable NPS RADAR					
Prompts						
<input checked="" type="checkbox"/> Another medication	<input checked="" type="checkbox"/> Route of administration (prescribing)					
<input checked="" type="checkbox"/> Antibiotic/Influenza prompt	<input checked="" type="checkbox"/> Route of administration (summaries)					
<input checked="" type="checkbox"/> Limited duration elapse	<input checked="" type="checkbox"/> Reason for deletion/cessation					
<input checked="" type="checkbox"/> Medication spelling	<input checked="" type="checkbox"/> Reason for medication					
<input checked="" type="checkbox"/> Previously deleted drugs	<input type="checkbox"/> Qty/Rpts on all regular medications					
<input checked="" type="checkbox"/> RB restriction confirmation	<input type="checkbox"/> Qty/Rpts on all Schedule 8 drugs					

Clinical tabs are only displayed if this window has been opened from the main menu!

Save Cancel