



How to guide

Data cleansing using Medical Director Software



Acknowledgement

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NQPHN acknowledges the Aboriginal and Torres Strait Islander peoples as Australia's First Nation Peoples and the Traditional Custodians of this land. We respect their continued connection to land and sea, country, kin, and community. We also pay our respect to their Elders past, present, and emerging as the custodians of knowledge and lore.



Contents

How to inactivate patients	4
.....	
To activate inactive patients	6
.....	
How to view inactive patients	8
.....	
How to merge patient records in Clinical	9
.....	
How to record allergies	11
.....	
How to record height, weight, waist, and blood pressure	12
.....	
How to enter a coded diagnosis	14
.....	
How to add a coded diagnosis while adding a prescribed medication	15
.....	
To avoid duplicate conditions in past history while prescribing medications	16
.....	

How to inactivate patients

Bulk inactivation

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

The screenshot shows the 'Patient Search' dialog box. The 'Not seen since' checkbox is checked, and the date '1/04/2019' is entered in the adjacent field. The search button is circled in red. Other search criteria include Age, Gender, Transgender, Pregnant, ATSI, Occupation, Smoker, and Drug/Condition.

The screenshot shows the search results window with 14 patients listed. The table below contains the data from the screenshot.

Surname	First name	Address	Referral Address	D.O.B.	Gender	Designation	Phone	Fax	Home	Mob	Home	Medication No.	Fession No.	Ched No.
Andrew	Heather	221 George Street, Bundaberg QLD 4...	Residential	12-05-1962	F	N						1592268-21	8128 8889-2	
Andrew	Irene	7 Telford Street, Bundaberg QLD 4...	Residential	23-02-1923	M	N	048591962					229474171		
Duck	Donald	12 Dimes Street, Daryland	Residential	20-12-2011	M	N						358265-21		
Andrew	Jane	8 Jaffers St, Bundaberg QLD 4670	Residential	13-01-1936	F	N						6382152-21	813 458 9446	
Andrew	Ferry	11 Wallace Street, Bundaberg QLD 4...	Residential	14-01-1913	F	N						6382152-21		
Andrew	Maurice	311 Howe Street, Bundaberg QLD 4670	Residential	23-06-1923	F	N						2294726171	561-388-822-4L	
Andrew	Jayvibe	2 Kennedy Road, Bundaberg QLD 46...	Residential	20-04-1970	F	N						3582265-21		
Andrew	Aria	2 Kennedy Road, Bundaberg QLD 46...	Residential	14-05-1978	F	N						3582265-21		
Andrew	Graham	2 Kennedy Road, Bundaberg QLD 46...	Residential	14-05-2000	M	N						3582265-21		
Andrew	Wheless	2 Kennedy Road, Bundaberg QLD 46...	Residential	04-11-2003	F	N						3582265-21		
Andrew	Selma	2 Kennedy Road, Bundaberg QLD 46...	Residential	12-01-2007	F	N						3582265-21		
Andrew	John	2 Kennedy Road, Bundaberg QLD 46...	Residential	17-06-1968	M	N						3582265-21		
Selvan	Caroline	1 Faise Street, Bundaberg QLD 4670	Residential	29-02-1972	F	N						247522038		
Walford	Ferry	1 Long Terrace, Bundaberg QLD 4670	Residential	26-02-1972	M	N						3172248726		

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, Fried	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: Mr First name: John Middle name: Michael Surname: ANDREWS Known as: John Date of birth: 17/06/1955 Gender: Male Transgender: []

Status: Active [v] Medicare No: 3900 26512 1 Expiry date: 31/10/2017 Medicare Gender: Male [v]

Regular practitioner: AP - Surgery [v] If the patient's name is different on the Medicare Card

Alias Surname: [] Alias First Name: []

ATSI: Neither Aboriginal nor Torres Strait Is... [v]

Ethnicity: [] [v] Australian Swiss

Chart type: Permanent [v] ICD No: []

Chart No: 343 ICD Record Status: [] ICD No Status: []

[Associate Chart No]

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

[Waiting Room] [Save] [Print] [Cancel]

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.

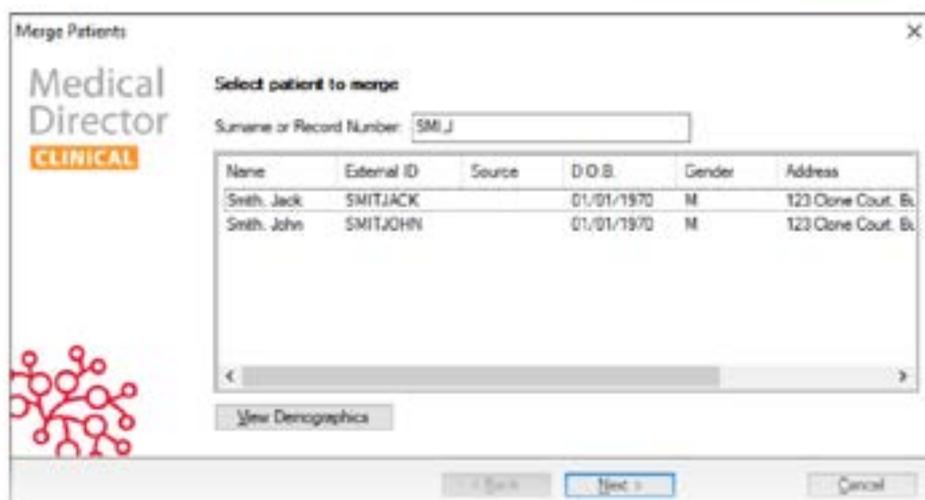
Name	Age	Gender	Chat Number	Address	Phone Number
Anderson, David	64yrs ...	M		61 Wallace Street, Bundaberg 4670	
Anderson, Penny	25yrs ...	F		61 Wallace Street, Bundaberg 4670	
Andrews, Anna	20yrs ...	F		2 Kennedy Road, Bundaberg 4670	
Andrews, Fred	36yrs ...	M		3 Takahvan Street, Bundaberg 4670	0450501502 (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	55yrs ...	F		314 Hope Street, Bundaberg 4670	
Andrews, Melissa	15yrs ...	F		2 Kennedy Road, Bundaberg 4670	
Andrews, Sasha	11yrs ...	F		2 Kennedy Road, Bundaberg 4670	

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



- 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.
- h. To complete the merge process > Click finish



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



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 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

The screenshot shows the Medical Director Software interface. At the top, a red box highlights the 'Allergies & Adverse Reactions' dropdown menu, which is currently set to 'CAT HAIR, DUST MITE, GRASSES'. Below this, the 'Patient Details' window is open, showing a table of allergies:

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

Below the table, a red box highlights the 'No Known Allergies / Adverse Reactions' checkbox, which is currently unchecked. To the right, the 'Add' button is also highlighted with a red box. An 'Add Allergy / Adverse Reaction' dialog box is open in the foreground, with a red box around it. The dialog contains the following fields:

- Search: PEN
- By Drug (radio button)
- By Class (radio button, selected)
- Other (radio button)
- Nature of Reaction: (empty text box)
- Reaction Type: Allergy (radio button, selected), Adverse Reaction (radio button)
- Severity: Severe (dropdown menu)
- Buttons: OK, Cancel

At the bottom right of the dialog, the 'Save' button is highlighted with a red box. The main window also has a 'Save' button highlighted with a red box.

How to record height, weight, 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

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**

View: All

Current Measurements

Height: 170 (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.

Blood Pressure

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

Device: **Manual**

Current Measurements

Blood Pressure

Cuff Location: Unspecified

Sitting: / /

Standing: / /

Lying: / /

Date	Time	Location	Type	BP	Pulse	Rhythm
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	

Save **Close**

How to enter a coded diagnosis

To add in a coded diagnosis in Past History

The following steps demonstrate how to Inactive patients with bulk Inactivation.

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

The screenshot displays the Medical Director Software interface for a patient named Ms Heather ANDREWS. The patient's details include DOB: 12/05/1963, Gender: Female, Occupation: School Teacher, and Address: 234 George Street, Bundaberg, Qld 4670. The 'Past history' tab is selected, showing a table of historical conditions:

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

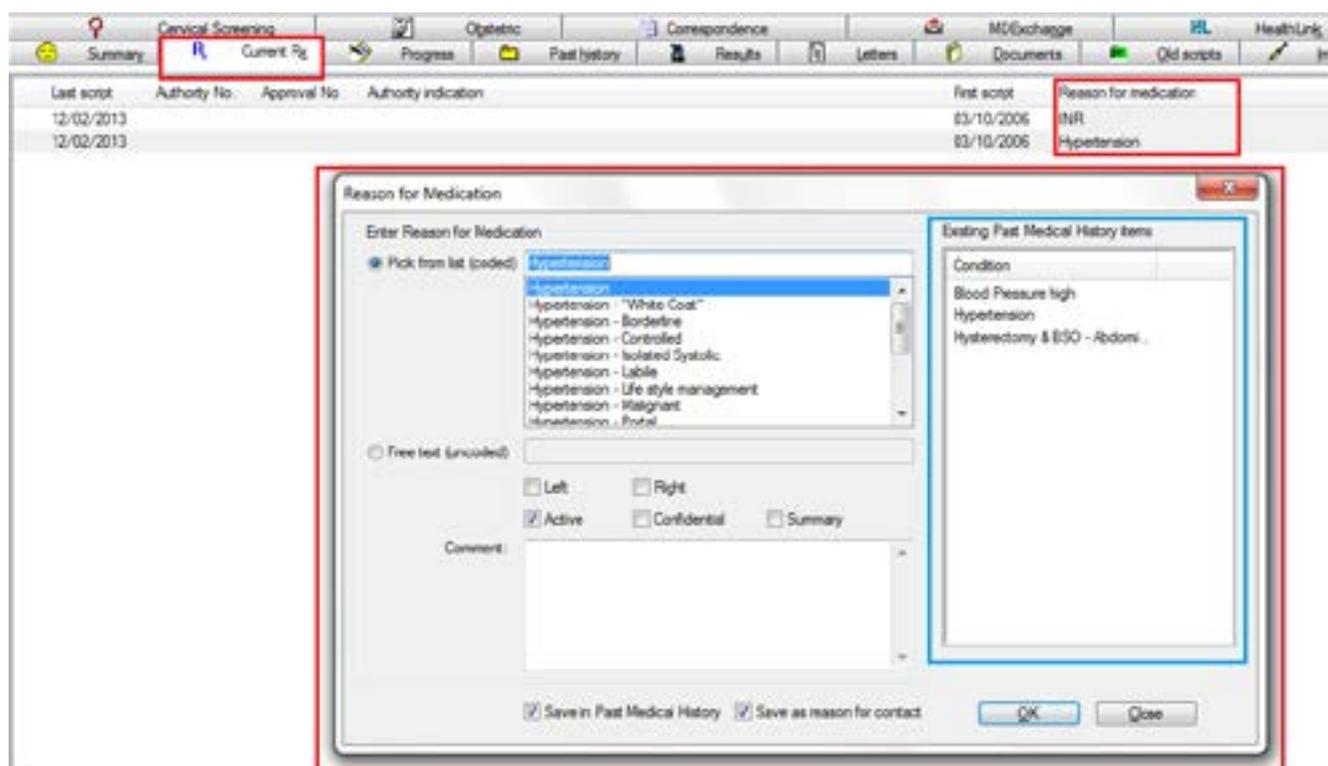
A 'New History Item' dialog box is open, allowing the user to add a new entry. The dialog includes fields for Year (2019) and Date (09/04/2019). Under the 'Condition' section, the 'Pick from list (coded)' option is selected, with an empty list box below it. Other options include 'Free text (uncoded)', 'Left', 'Right', 'Active problem', 'Confidential', and 'Summary'. A 'Comment' text area is also present. The 'OK' button is highlighted with a red box.

How to add a coded diagnosis while adding a prescribed medication

Steps

The following steps demonstrate how to Inactive patients with bulk Inactivation.

- 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



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.

