

Importing E-Mail messages into Medical Director

There are two ways to import e-mail messages into Medical Director. The method chosen will depend on whether the e-mail attachments also need to be saved to the record. It is far quicker and easier to import messages without attachments, so if possible, advise likely senders to avoid attachments unless absolutely necessary.

Both methods can be used, but the first method saves messages to the Letters tab in the patient's clinical record and the second method saves them under the Documents tab, which means two places to check for saved e-mails. The first method is recommended if the HIC's PKI is used to sign and encrypt e-mails.

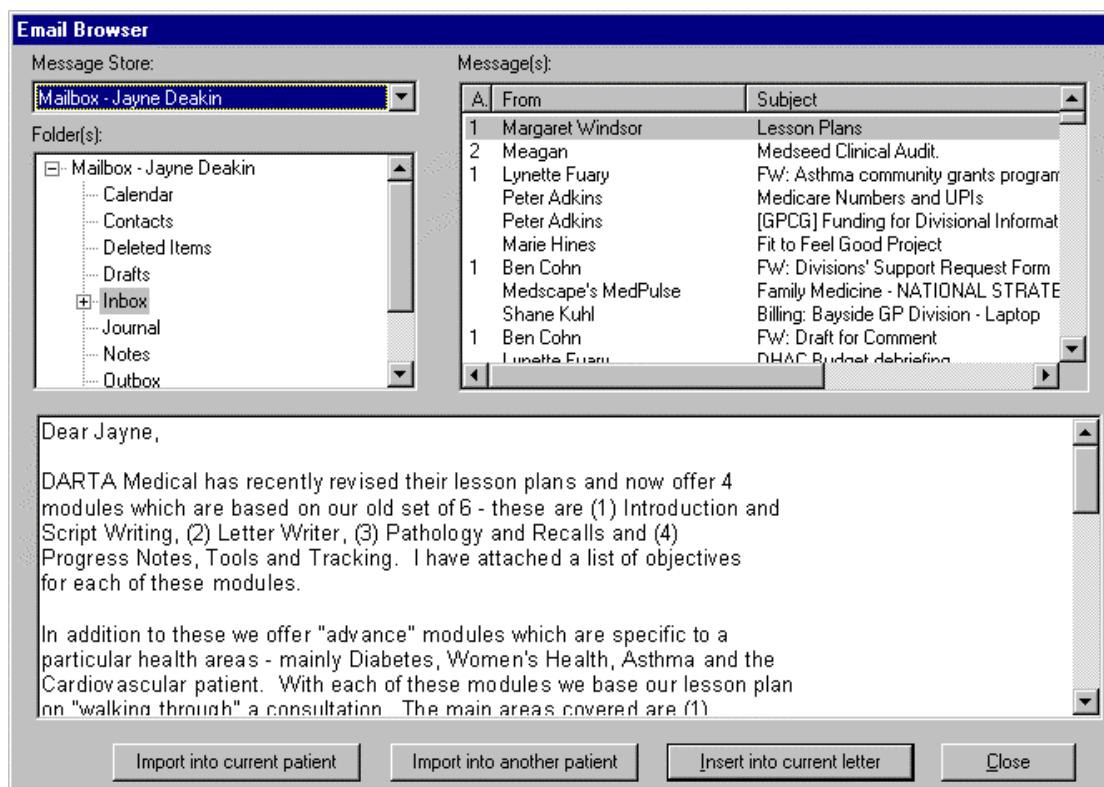
Prerequisites

The PC needs to have an e-mail client (eg. Outlook, Eudora etc.) configured and operational. The e-mail client does not need to be open for the following procedures to work, however, if it is already open, it takes slightly less time for the import screen to display as it does not need to load the mail software first.

Importing e-mails without attachments

These messages are listed under the Letters tab in the patient record:

1. Open MD's Letter Writer.
2. Click on File, E-Mail, Import. The following screen will display with the default mailbox details:



The screen may take a few seconds to load and the bigger the size of the mailbox, the longer it will take to display the screen.

If it is opened from a patient's record, all options will be available; if opened from the main screen, the option to 'import to current patient' is not applicable and will be greyed-out.

Messages are listed in the top right pane and are listed in date order (ie. The oldest message in the inbox displays first rather than the most recently received message that is usual in most e-mail inboxes.) The date field is hidden to the right of this screen but can be seen by scrolling the window to the right. It is not possible to sort the list by clicking on the headings.

Messages with attachments are listed with the number of attachments in the first column – if these attachments are required as part of the patient's record, these messages should be imported using the alternative method outlined in the section 'Importing e-mails with attachments' below.

3. To import a message, click on the message required to import in the top right screen to highlight it, then click on one of the three options at the bottom of the screen. Only one message can be selected at any time (ie. It is not possible to choose several messages from the list and then import all in one transaction.) If more messages are to be imported for the same patient, repeat this step to import each message individually.

Import into current patient will import the details into the letters tab of the current patient. If the Letter Writer was opened from the main screen this option will not be available.

Import into another patient will import the details into the letters tab of another patient on the system after prompting to find the patient's record. After clicking OK, the previous screen will still be available to select another message to import.

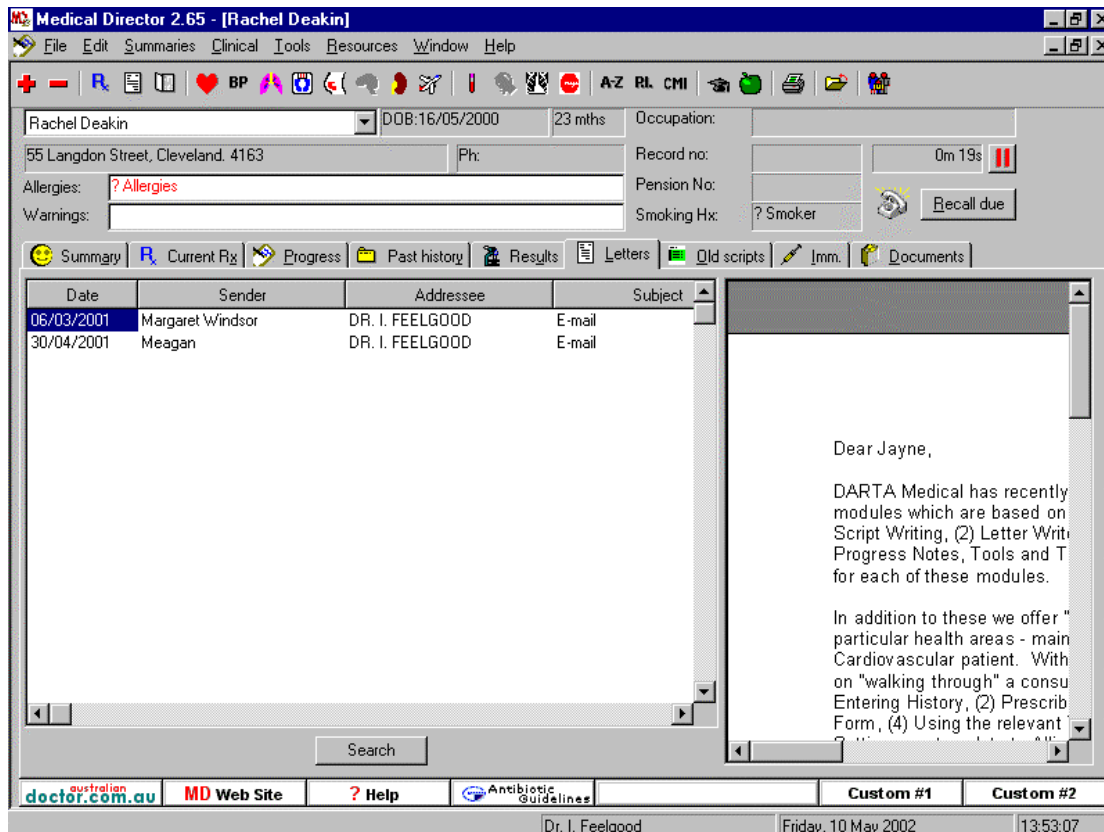
Name	Age	Record No.	Address	D.O.B.
Andrews, George	78 yrs	112	43 Main St., Demotown 1234	29/12/1923
Andrews, Heather	37 yrs		2 Kennedy Rd., Demotown 1234	07/11/1964
Andrews, Jennifer S.	30 yrs	107	23 Tanner St., Demotown 1234	17/10/1971
Andrews, Jodie	12 yrs	345681	5 Jefferson St., Demotown 1234	16/12/1989
Andrews, John	59 yrs	105	2 Kennedy Rd., Demo Town 1234	10/04/1943
Andrews, Julie	44 yrs	345247	5 Jefferson St., Demotown 1234	30/08/1957
Andrews, Maureen	77 yrs	345644	3 Best St., Demotown 1234	19/12/1924
Andrews, Melissa	7 yrs	345645	5 Jefferson St., Demotown 1234	18/07/1994
Andrews, Michael	32 yrs		23 Tanner St., Demotown 1234	18/05/1969
Andrews, Norman J.	75 yrs	364895	3 Best St., Demotown 1234	29/11/1926
Andrews, Sally	42 yrs		2 Kennedy Rd., Demo Town 1234	19/01/1960

Insert into current letter will import the message into the letter to create a letter that can be sent or saved.

It is possible to check several mailboxes if different profiles are set up on the system. To access another mailbox, use the drop-down box to select another Message Store from the top left corner of the screen.

Close when all messages have been imported.

- The messages are displayed in the patient's record under the Letters tab:



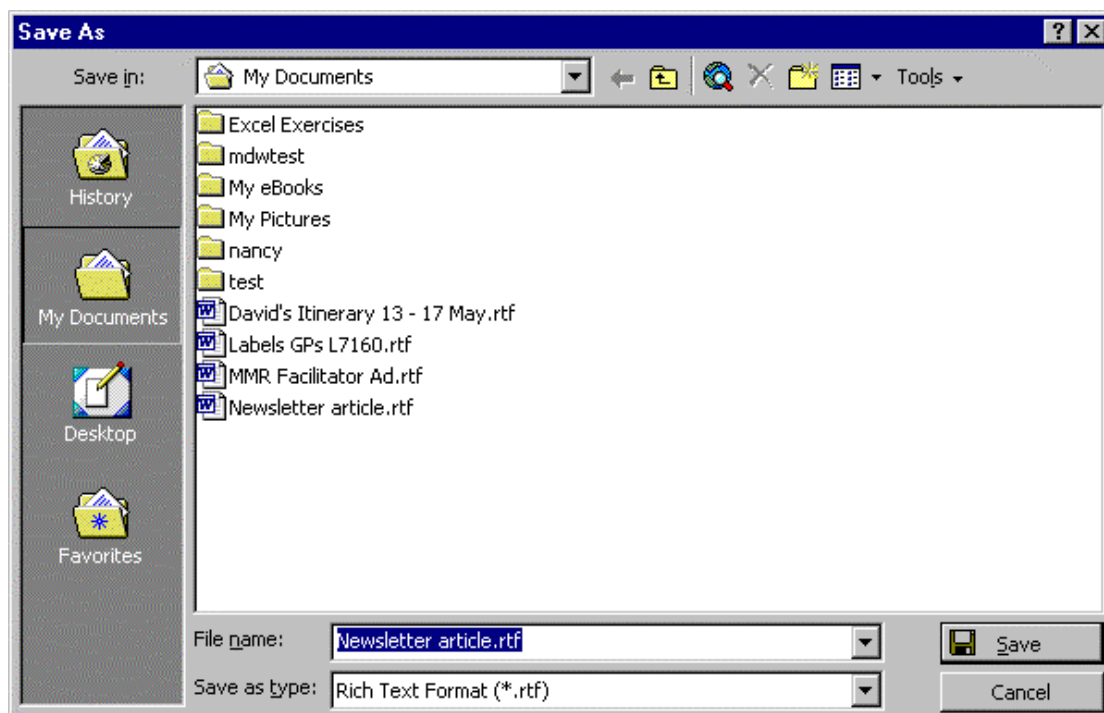
The addressee is the name of the person who is logged on to import the e-mails.

Importing messages with attachments

This method is slower than the method above, but can be used to import messages with or without attachments. In this method, the messages and attachments are listed under the Documents tab in the patient's clinical record.

Not all messages with attachments can be imported in a single import – those that do not save in .rtf format (ie. HTML or .txt format) will require the attachment and message to be saved and imported separately.

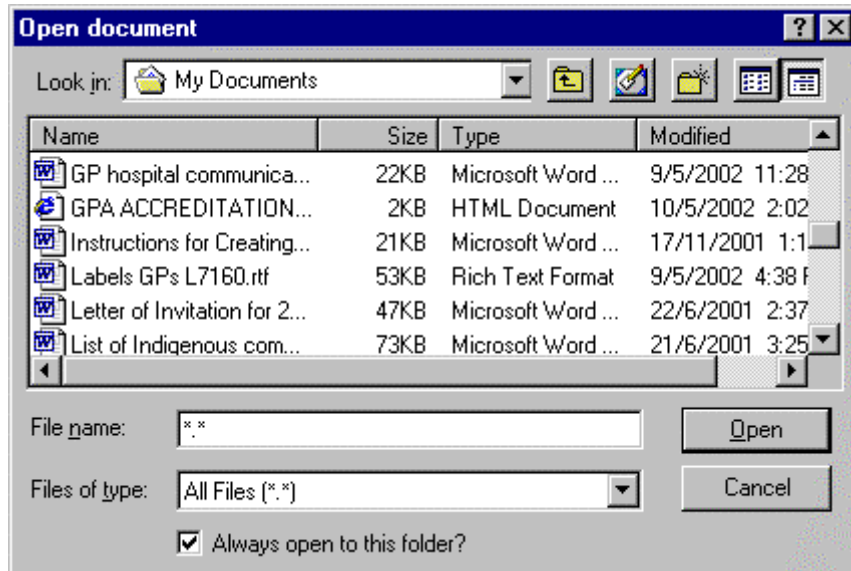
1. Open the e-mail client (eg. Outlook, Outlook Express, Eudora) and open the message to import.
2. Click on File, Save As... and save the message to a folder (the default folder offered is quickest). If the message has attachments, and the message format is Rich Text (with an extension of .rtf in the Files of Type box at the bottom of the screen) the attachment will be saved along with the message.



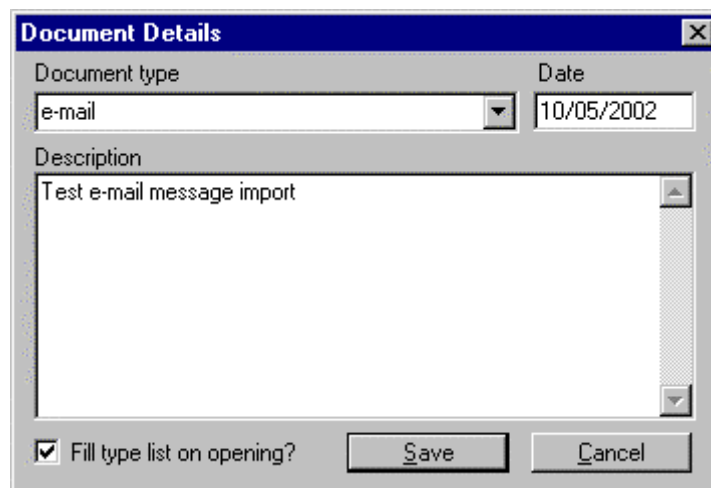
If there is any other file format in this box (eg. .htm, .txt) then after saving the message, go back to the message in the inbox and click on File, Save Attachments... to save the attachments to the same folder as the message.

3. After saving all the messages and attachments required for import from the mailbox, open Medical Director and open a patient's record.
4. On the Documents tab, click the Import button (centre of the screen).

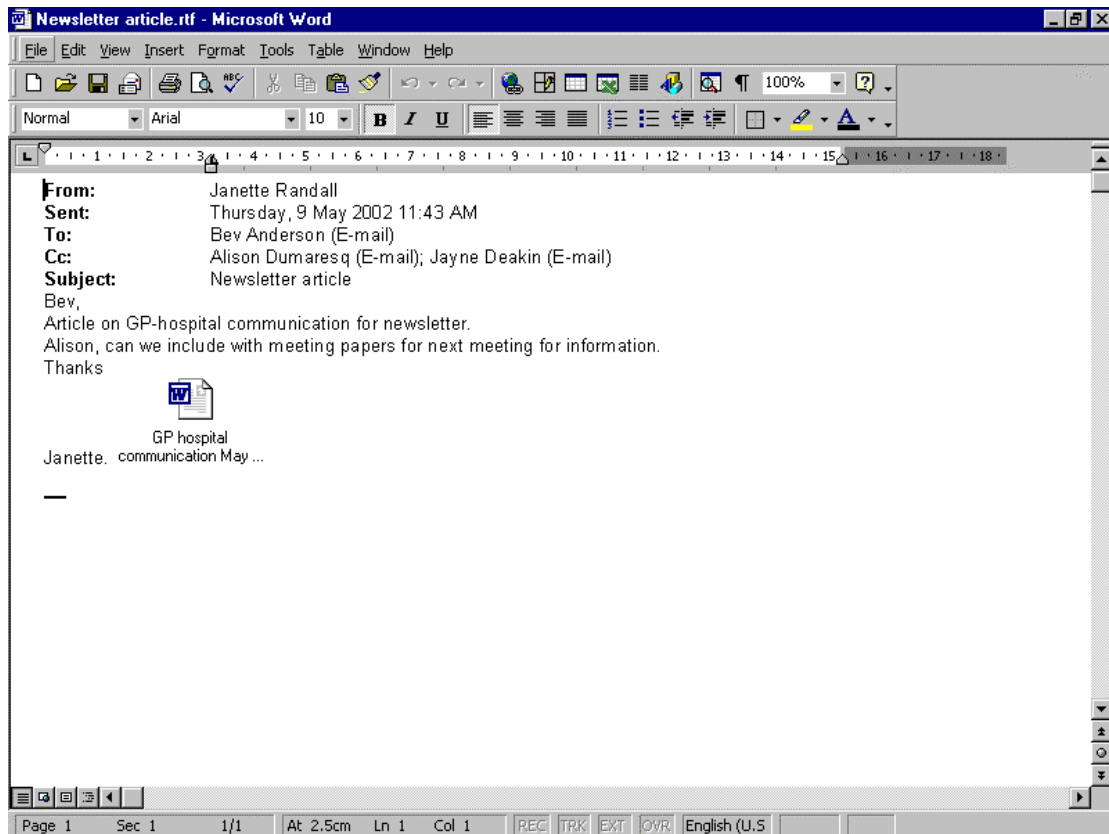
- The Open Documents box displays a list of files. The box opens the MDW2 folder by default, but this can be changed by clicking the drop-down Look in box and browsing to the folder where the saved messages are stored. To ensure the box always opens to this location in the future, click on the 'Always open to this folder' tick box.



- Click on the appropriate file from the list (only one can be imported at a time) and click on Open button.
- The file will open and a box will display to record details of the document.



- Complete the details and click the Save button.
- Rtf attachments can be viewed by double-clicking on the icon within the message to load a word processor. Close the open documents to return to the Medical Director screen.



10. If there are more messages or attachments to import for this patient, click on the Import button and repeat the steps above. Otherwise, close the patient record and open another patient's record and start importing messages appropriate for that patient.

Medical Director does not link to external documents - it saves a full copy of the imported file in it's own database. Therefore, once a file has been imported into the Medical Director database, it can be safely deleted from the original location on the computer's disk drive.

Importing messages and attachments may take up considerable amounts of disk space. It is recommended that the free disk space on the file server is checked regularly and drives are replaced once they reach 70% capacity. As storage requirements will also increase for backup purposes, consider the need for a tape drive if currently using alternative options for backup.