

## Medical Director V2 - Inactivate Patients

If a patient hasn't visited the clinic for a number of years (say 3 or 4) it is best to make them inactive, so they do not affect statistics and accurate data retrieval. You can do this opportunistically, but once a year you should also do a database search for those patients who haven't presented in the last x number of years<sup>1</sup>. Undertaking a regular review will greatly assist maintaining a quality database.

Inactivating patients will hide patients from view and from standard patient searches. You will still have access to a patient's clinical data. You might select this option if a patient has moved away from your surgery, for example. Patients marked in this way can easily be reactivated.

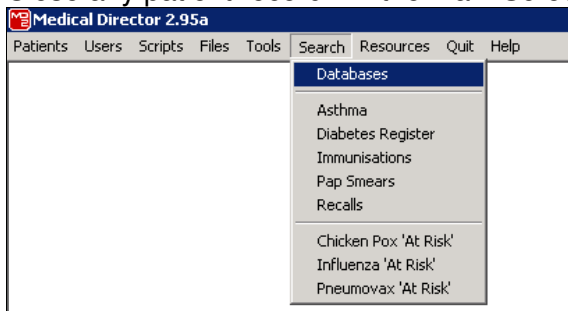
Please Note:

- Remove "outstanding actions" if not part of the recall system being used.
- Delete old recalls – begin by choosing a date range of 3-6 years previous. (Remember, a practice decision needs to be made as to what actions are taken on these particular items.)

### How to do it

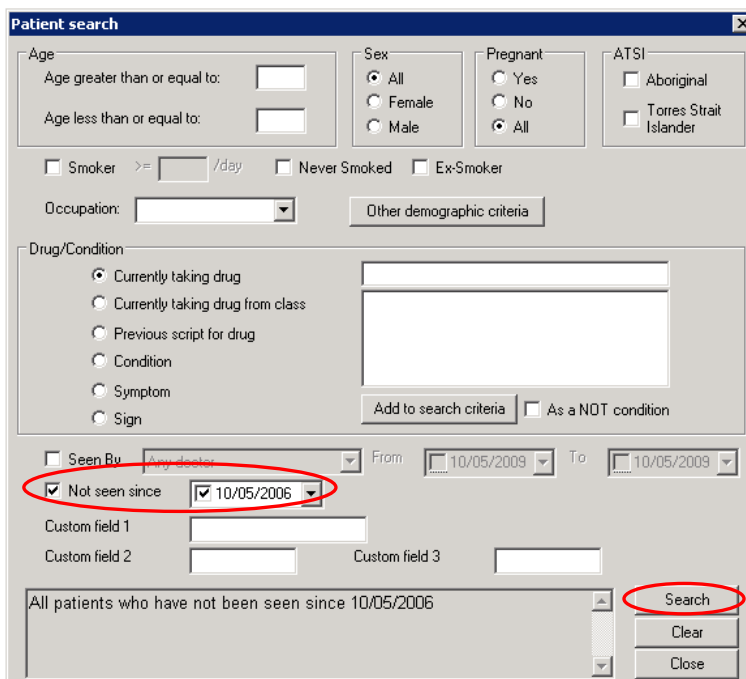
#### Step 1 – Search Patients

1. Close any patient record. In the Main Screen, go to **Search** and select **Databases**.



2. The 'Patient Search' window appears.

- Tick **Not seen since** and **enter the relevant time period** (eg 3 years from today's date).
- Click on the **Search** button.



The 'Patient search' window contains the following fields and options:

- Age:** Age greater than or equal to: [ ] Age less than or equal to: [ ]
- Sex:**  All  Female  Male
- Pregnant:**  Yes  No  All
- ATSI:**  Aboriginal  Torres Strait Islander
- Smoker:**  Smoker >= [ ] /day  Never Smoked  Ex-Smoker
- Occupation:** [ ] Other demographic criteria: [ ]
- Drug/Condition:**  Currently taking drug  Currently taking drug from class  Previous script for drug  Condition  Symptom  Sign
- Search criteria:** Add to search criteria [ ] As a NOT condition
- Seen By:** [ Any doctor ] From [ 10/05/2009 ] To [ 10/05/2009 ]
- Not seen since:**  [ 10/05/2006 ]
- Custom fields:** Custom field 1: [ ] Custom field 2: [ ] Custom field 3: [ ]
- Search results:** All patients who have not been seen since 10/05/2006
- Buttons:** Search, Clear, Close

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3. A list of patients will appear based on your search parameter. Click on the **Print** button.

Medical Director 2.95a - [Search Results]

All patients who have not been seen since 10/05/2006      Number of matching patients: 20

Setup search criteria

Surname	First name	Address	D.O.B.	Sex	Phone	Bus. Phone	Medicare No.	Pension No.	Chart No.
Anderson	Penny	61 Wallace St, Melbourne 3000	04/07/1993	Female	9456 2345		4133400271		345677
Andrews	Graham	2 Kennedy Rd, Demo Town 4523	22/07/1999	Male	9123 4567		3500265121		
Andrews	Heather	2 Kennedy Rd, Demotown 1234	12/05/1963	Female			3500265121		
Andrews	Jennifer S.	2 Kennedy Rd, Demo Town 4523	20/04/1970	Female	9123 4567	02 234 1294	3500265121 / 2		107
Andrews	John	2 Kennedy Rd, Demo Town 4523	17/06/1943	Male	9123 4567	9345 6789	3500265121	1234	105
Andrews	Julie	5 Jefferson St, Parkville 3256	03/03/1956	Female	234 6789	234 6789	6500225221 / 3		345247
Andrews	Michael	23 Tanner St, Bondi 2367	08/05/1954	Male	02 234 1278		4133400181		
Andrews	Norman J.	3 Best St, St Kilda 3107	02/06/1995	Male	8182 5634		2294724171	QX128223	364895
Andrews	Sally	2 Kennedy Rd, Demo Town 4523	13/02/2000	Female	9123 4567		3500265121		
Andrews	Sally	21 Best St, Pill Land 3123	12/05/1998	Female	9882 3456				
Baker	Stephen	6 Midway St, Demotown 1234	02/05/1957	Male					
Dillon	Joe	2 Eagle St, Demotown 1234	04/08/1935	Male					345623
Donnelly	George	43 Main St, Adelaide 5678	02/07/1922	Male	234 6789	234 8365	2294724441 / 1	QX121311	112
Duck	Donald	12 Disney Street, Disneyland	/ /	Male			3500265121		
Lollie	Ollie	Easy Street, Home Town 4444	/ /	Male			3500265121		
Nerk	Fred	12 My-Home St, Footscray 3011	12/05/1955	Male	4567 8900	3456 6778			
Nerk	Sally	12 My-Home St, Footscray 3011	12/12/1997	Female	4567 8900	345667788			
Smith	Fred	2 Kennedy Rd, Demo Town 4523	23/08/1998	Female	9123 4567	9345 6789			
Wagtail	Willy	The Eucalyplus Tree, Sherwood Forest 4040	/ /	Male			3500265121		
Zanbuck	Jodie	5 Jefferson St, Parkville 3256	19/06/1988	Female	456 7898		6500225221 / 2		345681

Open   Recall   Save   **Print**   Labels   Mail merge   Close

You now have the task of going through the list and recording each patient in MD as inactive. (You cannot do a bulk inactivation. This option is only available from MD3.7 onwards).

Depending on the number of patients needed to be inactivated, you may wish to consider setting a goal of inactivating x number of patients per week.

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### Step 2 – Inactivate Patients Individually as follows:

1. From the **Main Screen**, call up the identified patient needing to be inactivated (F2). Click on the **Delete** button.

Select patient from list

Enter patient surname or record number  
ANDERSON  Include inactive patients

Name	Age	Record No.	Address	D.O.B.
Anderson, David	54 yrs	345	61 Wallace St, Melbourne. 3000	04/01/1955
Anderson, Penny	15 yrs	345677	61 Wallace St, Melbourne. 3000	04/07/1993

Buttons: OK, Add, New, Delete, Edit, Merge, Close

2. The "Delete patient box will appear. Click on the **Mark as inactive** button.

Delete patient

Do you want to:

Buttons: Mark as inactive, Mark as deceased, Delete permanently, Cancel

3. **Repeat Step 2** for every patient identified as inactive.

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### How to activate inactive Patients

If patients call the practice and they do not appear to be on the database, ask them if they have attended before.

If they say 'Yes' - Tick the **Include inactive patients**.

Patients that have been marked as inactive will appear in Red.

**Select the required inactive patient** and press **OK**.

Opening the patient will completely reactivate the patient.

Name	Age	Record No.	Address	D.O.B.
Anderson, David	54 yrs	345	61 Wallace St, Melbourne. 3000	04/01/1955
Anderson, Penny	15 yrs	345677	61 Wallace St, Melbourne. 3000	04/07/1993

Note: Utilise Medical Director Help Menu to search further information.  
Help → Index → Search → Type - 'Deleting a Patient' → Display.

This document has been created by SEA-GP (Brisbane) using screen shots and content from Medical Director Program.

**Disclaimer:** Whilst every effort is made to ensure accuracy, SEA-GP (Brisbane) does not accept any liability for any injury, loss or damage incurred by or reliance on the information contained within this information sheet.

<sup>1</sup> Medical Director – "Clean up your act!! – A guide to recording accurate information and "cleaning up" those areas of past neglect. Noel Stewart, North East Valley Division of General Practice (April 2008)