



Explorer Software

Training Manual

Helping to navigate the day to day use of the program

[Version 2.2] [Release: 1]

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Medical-Objects Pty Ltd

Suite 15

102 Wisers Road

Maroochydore, QLD, 4558

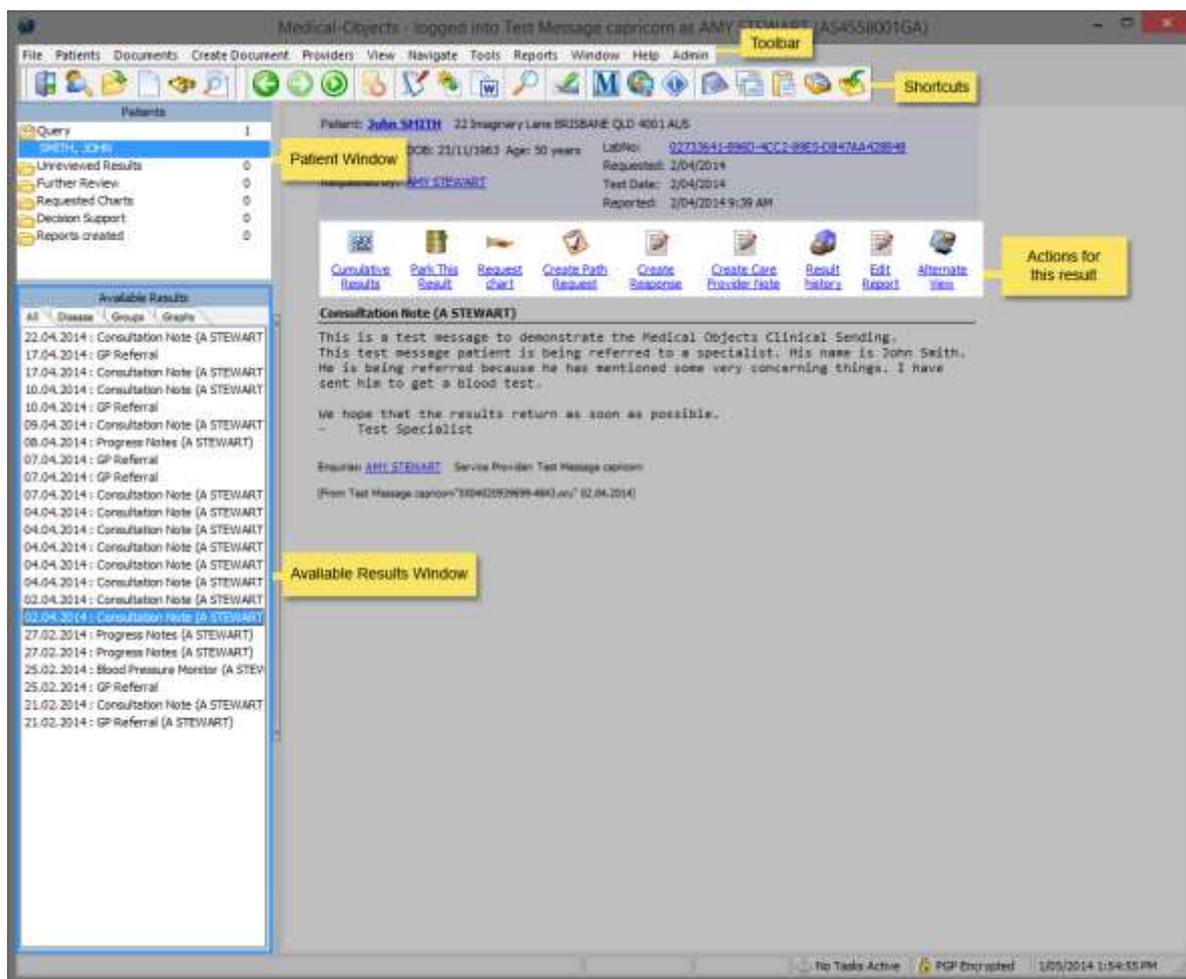
Australia.

www.medical-objects.com.au

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Desktop Layout



This is the layout for the Explorer Software. Being aware of this will simplify your day to day use of the **Explorer Software**.

Along the very top of the program window is the **Tool Bar**, starting at the File tab. Each Heading has a drop down box which appears when clicking on the word.

Under the Tool Bar are Icons, which are used as **shortcuts**

Below and to the left is the **Patient window**. It holds folders relating to patient charts and results.

Under the Patients window is the **Available Results**. This lists documents held in the patient charts.

When a document is requested, it is shown in the **Main Window** right of the Patients and Available Results. All icons and commands within this window relate directly to the result currently shown (e.g. Cumulative Results, Park This Result etc....)

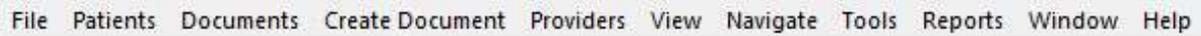
Please not that unlike other software you may have used in the past, all results, letters and messages are filed under **Documents**.

All practitioners, whether Doctors, Physiotherapist, Dieticians or others are referred to as **Providers**.

Toolbar

The Tool Bar in Explorer allows shortcuts to commands that are regularly used.

Each has a drop down box relative to each command. Those you will use most often are:



File Patients Documents Create Document Providers View Navigate Tools Reports Window Help

File - Print

Patients - Find Patient, Merge Records, Register new Patient

Documents – Send a Copy to Another Doctor, View Document Delivery

Create Document – New Patient, Current Patient, Progress Note

Providers – Look up Provider

Help – Online Manual, Upgrades, Email Support Desk

Logging In and out

When the Explorer Software is started up, a box will appear asking for a passphrase. Enter your passphrase into the box to log in.



If the program remains idle for more than 20 minutes, the software will suspend and require you to re-enter the passphrase again.

To log out, press the **Log Out** icon in the shortcuts. If you wish to log back in, click the **Log In** icon.



Log In Icon



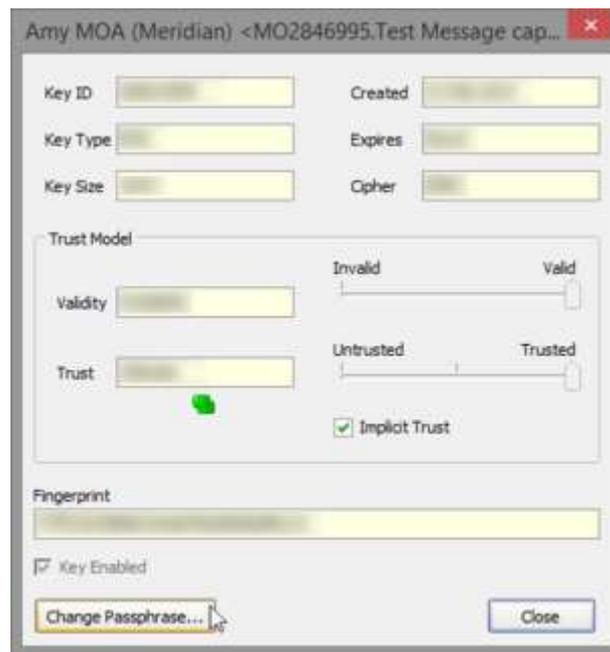
Log Out Icon

Changing your Password

To change your password, click on the **PGP Encrypted** button located at the very bottom of the window, next to the current time and date.



A window will appear with your encryption details. In the bottom left hand corner of the screen, click on the **Change Passphrase** button.



Enter your current passphrase and new passphrase in the appropriate boxes, then click **OK** when done.



Finding Incoming Documents

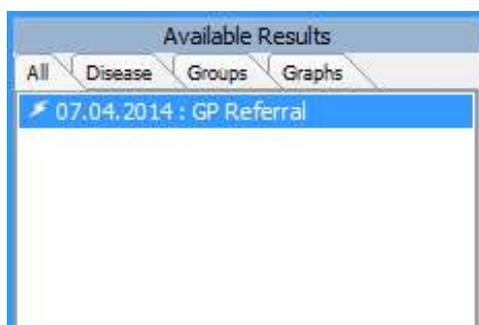


Results are downloaded automatically, however you can manually download by clicking on the **New Results** shortcut icon. This is represented by a pair of Binoculars (Shown left).

When there are new results, the number of patients with new results will be displayed under the **Unreviewed Results** folder in the main window. To retrieve the results, click on the **Unreviewed Results** folder to show the list of patients.

Patients	
Query	0
Unreviewed Results	1
SMITH, JOHN	
Further Review	0
Requested Charts	0
Decision Support	0
Reports created	0

Click on the individual patients name to display the list of results to be reviewed. These are displayed in the **Available Results** window below.



Click on an item in the list to display the results. The **Lightning Sign** will appear next to the result to indicate that the result is not reviewed. To easily scroll through results, hit the space bar. This will mark them as reviewed. Once you have reviewed the results they will be filed under the patient's name. They can be found in the patient's file, which can be accessed by locating **Look up Patient** ('To Find a Patient Chart' goes through this process in detail)

To Find a Patient Chart



Click the **Find Patient** icon in the shortcuts.

To search for a patient using the **Lookup Patient** window, type the patient's surname then first name. It's recommended that only a few letters from both the surname and first name are used when searching to allow for potential variations in spelling.

The screenshot shows the 'Lookup Patient' window with the following fields and controls:

- Search input: Surname <space> Firstname <Return> with the text 'Sm Jo' entered.
- Matching: A dropdown menu set to 'Partial'.
- Max.: A text box containing the number '50'.
- Buttons: A lightning bolt icon, a magnifying glass icon, and an 'Add...' button with a person icon.

A list of patients will be displayed in the table. Hover the mouse over the patient's name to select them. Click on the Patient's name or press the **OK** button at the bottom of the window to view the Patient's details.

The screenshot shows the 'Lookup Patient' window with search results displayed in a table. The search criteria remain the same as in the previous screenshot.

Name	DOB	Sex	Medicare No	Address
SMITH, John	23.11.1963	M		BRISBANE
SMITH, Joan	27.9.1965	F		BRISBANE

At the bottom of the window, there is a 'More Detail' button with a dropdown arrow, and 'OK' and 'Cancel' buttons.

Once you have found the patient, their chart will be displayed in the **Available Results** window. The most recent document will be displayed on main window.

Writing Progress Notes on a Patient



To write progress notes that will be stored in the patient's chart, you must initially look up the patient to bring up the chart.



Then click on the **Create Progress Note** icon in the shortcuts. This will bring up a window which you can type inside. (Icon shown left)

The screenshot displays the Medical-Objects software interface. The main window shows a patient's chart for John SMITH, with details such as DOB (23/11/1963), Age (50 years), and LabNo (E9043168-2014-4111-9288-D60EAFCE52E2). A list of available results is visible on the left, including various consultation notes and referrals. A progress note window is open in the foreground, titled "Progress Notes: John Smith DOB: 23/11/1963". The window contains a text area with the text "Patient was seen today" and a dropdown menu showing the user "Amy STEWART (AS4558001GA)". The window has "OK" and "Cancel" buttons at the bottom right.

Once complete, click **OK** to see a preview. The progress note will then be stored in the patient record.

How to Look Up a Provider



Select the **Lookup Provider** icon from the shortcuts.

To search for a doctor, type the doctor's surname then first name into the search box. Press enter when done, or click the search button on the right hand side of the box. It is recommended that only a few letters from both the surname and first name are used to allow for potential variations in spelling. In addition, please do not use hyphens or commas between names.

The screenshot shows the 'Lookup Provider' window with the following details:

- Search criteria: Surname <space> Firstname <Return>, Search Type: Name, Max: 50
- Search results table:

Name	Job Title	Practice Name	Phone	Address	Provider ID
STEWART, AMY		Medical-Objects Pty Ltd	(07) 54566000	MAROOCHYDORE 102 Wisers Road	AS4558000GT
STEWART, AMY		MOA Test Capricorn	(07) 54566000	MAROOCHYDORE 102 Wisers Road	AS4558002GZ
STEWART, AMY		Medical-Objects Pty Ltd	(07) 54566000	MAROOCHYDORE 102 Wisers Road	AS4558001GA

Additional window details: Legend: Provider is online. Buttons: More Detail, OK, Cancel.

Hover the mouse over the doctor's name to select a doctor's details to view. Click on the doctor's name or press the **OK** button at the bottom of the **Lookup Staff** window to view the doctor's details. Using **Search Type** you can also look up providers by their practice, provider number or post code.

Sending a Letter

There are a few ways of sending documents:

- Letters can be sent directly from the Explorer Software using the **Create Document** tab. The drop down box offers free text option as a **New Document**.
- Templates of your own that have been set up in the Explorer Software – **Document from Template**. To set up templates within the Explorer Software, refer to the Medical-Objects Wiki:

http://wiki.medical-objects.com.au/index.php/How_do_I_create_a_report_template_for_later_use%3F

Alternatively please see 'Creating a Quick Report Template' in this manual

- Another option, if you have the Word Plug-in installed, is using your templates in Word and it will be saved into the Explorer Software when sent. Documents typed in Word can also be saved into the Explorer Software in the **Letters for Editing** folder to be sent later.

No matter which option is used, the **Report Details** window will need to be addressed.

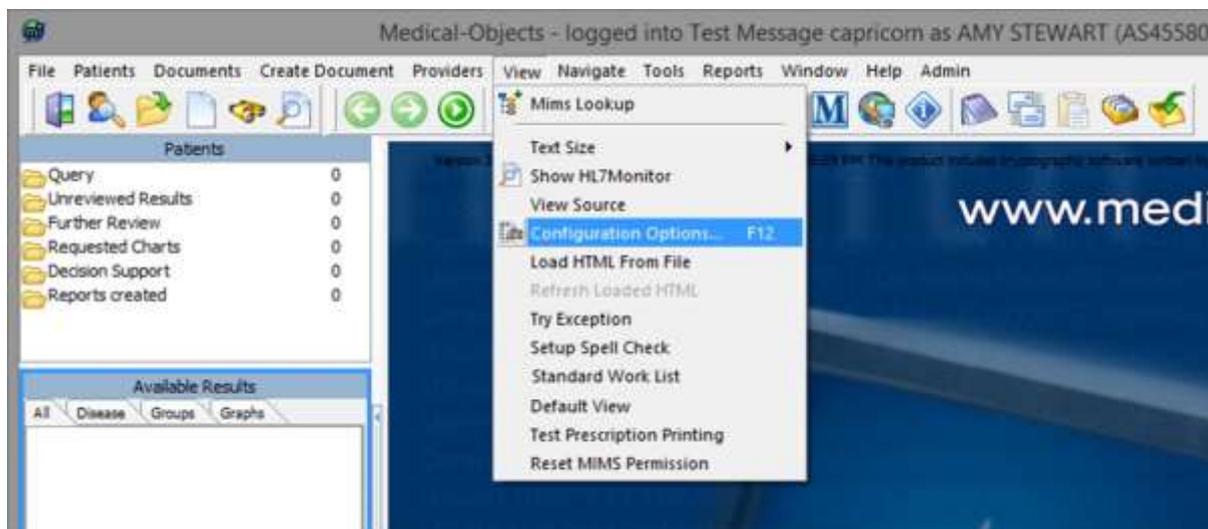
The screenshot shows the 'Report Details' window with the following fields and values:

Patient Details		Addressing Details	
Surname	First name	Middle name	Addressed to
DOB	Sex	Medicare Number	Copies to
Street Address			
City		State	Postcode
Patient Class: Outpatient Principal Class			
Report Details			
Request Date	Observation Date	Request Order Number	Iron
6.5.2014	6.5.2014		
Full Lab No	Report Title	Clinical Area	
4574C567-3F31-43E7	Consultation Note	Clinical letter in report	

At the bottom of the window, there are checkboxes for 'Confidential Report', 'Editable', 'For Approval Before delivered', and 'Abnormal Result', along with 'OK' and 'Cancel' buttons.

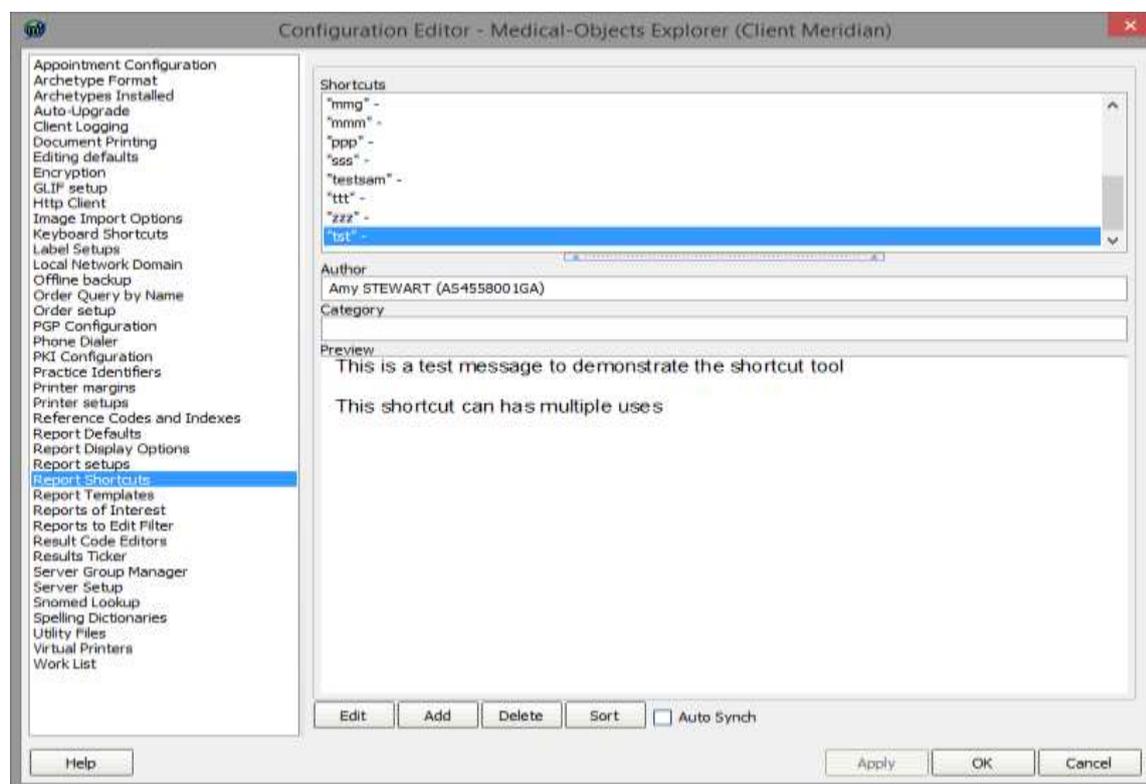
Creating a Quick Report Template

In the Explorer Software go to **View** → **Configuration Options (Shortcut: F12)**

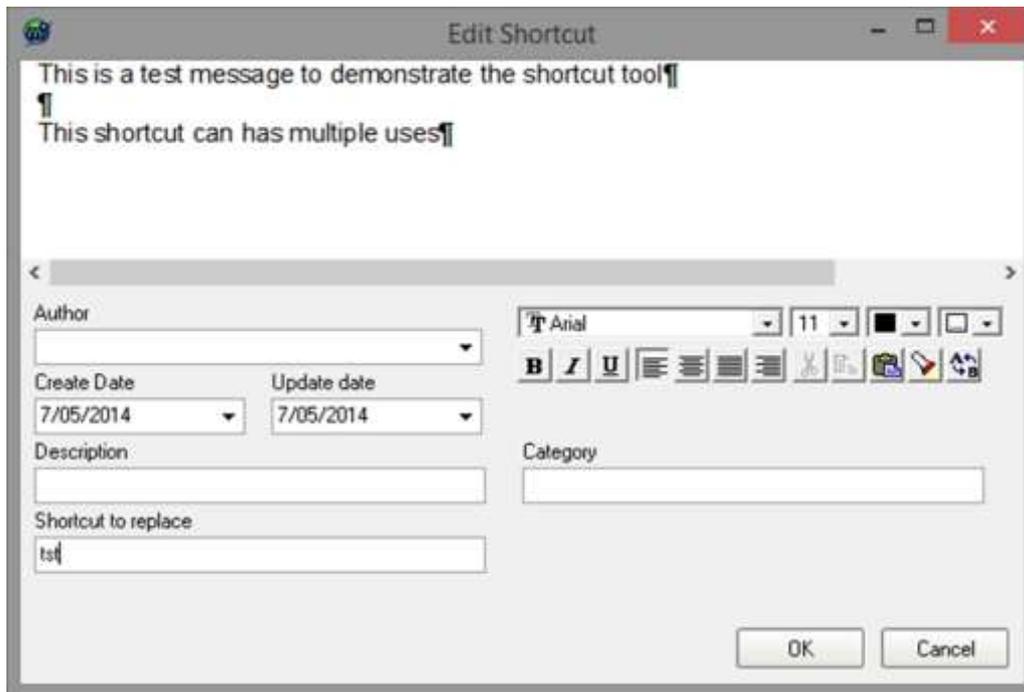


Go to **Report Shortcuts**

- You can choose **Add** to create a new shortcut or **Edit** to change a current shortcut. In the top window enter the body of the document you wish to create a shortcut for.



From here the template can be created. Please insure you put an extra return on the end of your report. In the **Shortcut to Replace** field, enter a series of characters that will replace your document. Please ensure you use a shortcut word such as 'tst' or 'stn' and do not use a dictionary word as it will be replaced with your shortcut.



To use your new shortcut, create a new message by pressing the **Create Document** icon. Now enter in the main window the characters you used as your shortcut.

To Forward or Resend a Letter

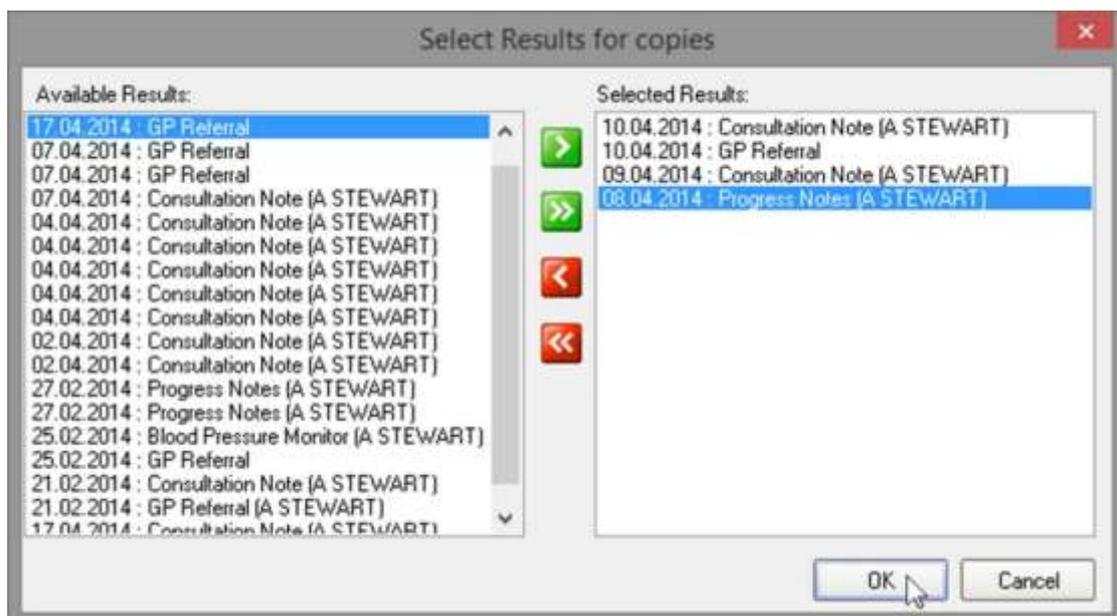
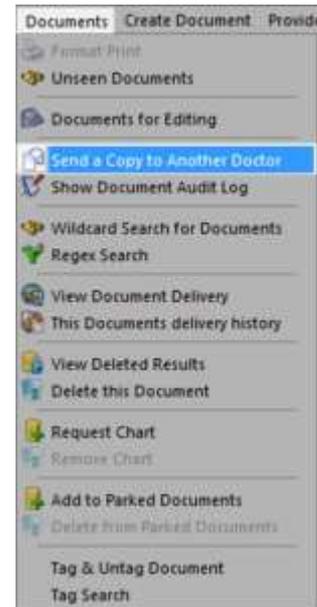


In order to resend or forward patient information to another doctor/provider, it is necessary to first look up the patient. Their chart will be displayed in the **Available Results window**. Click on any of the available results and the report will be displayed in the main window.

To send the patient information to another doctor, select **Send Copy to Another Doctor** from the **Documents** menu. (Shown Right)

Patient's results are displayed on the left hand side of the **Select Results for Copies** window, and the results to be sent are displayed on the right hand side. Use the set of arrows between the two lists to select the results being sent. The single arrows will only move the selected result, while the double arrows will move all of the results.

Click **OK** to proceed. The **Lookup Staff** window will appear. Search for the provider or providers you are sending to by typing part of the Surname then first name. Click **OK** or Press enter to begin searching. Highlight and click the desired recipient. The document will then send.



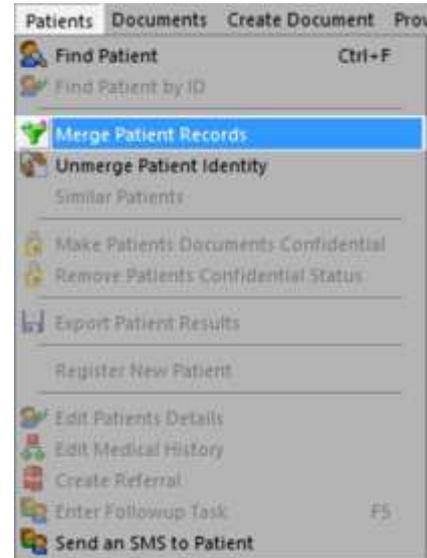
Merging a Patient Report

In some cases patients will appear in the system as two or more different people. This could be due to a surname change or patient information being spelt differently between facilities.

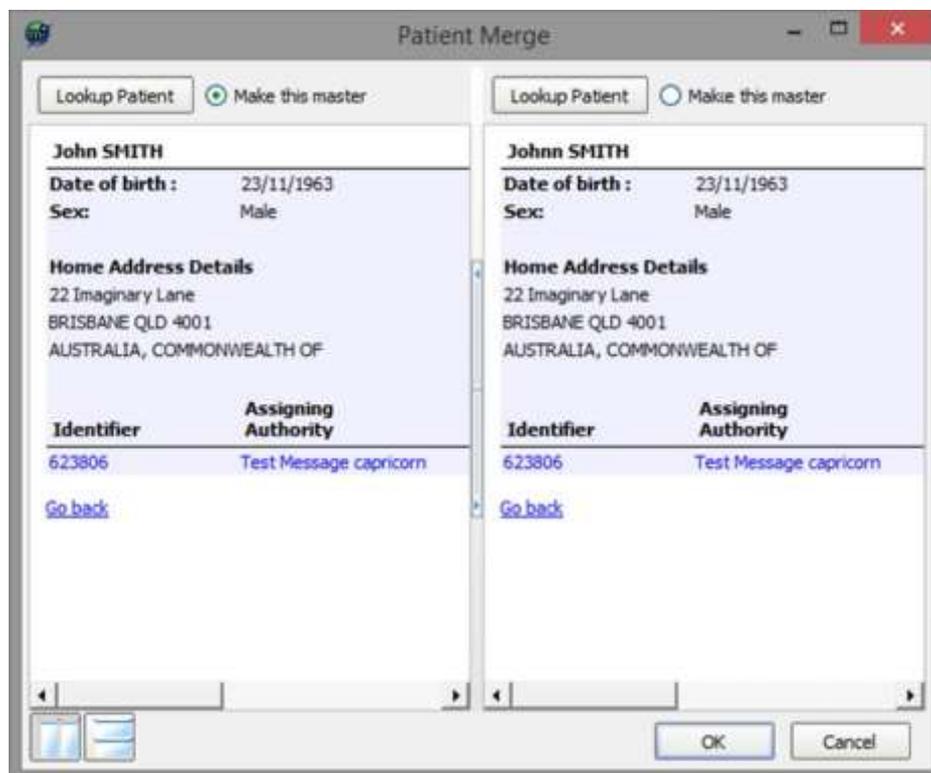
This process enables currently different patient files to be reconciled, and recognised by the system as the same patient.

In the Explorer Software go Patients → Merge Patient Records

Click on the **Lookup Patient** button on one side and use the same directions as on the **To Find a Patient Chart** section. When the patient is selected, the details will appear in the window underneath. Do this for both windows.



Once both patient details are selected, choose one of the files and select **Make this Master**. This will become the file with the dominate details.



Printing Patient and Provider Files

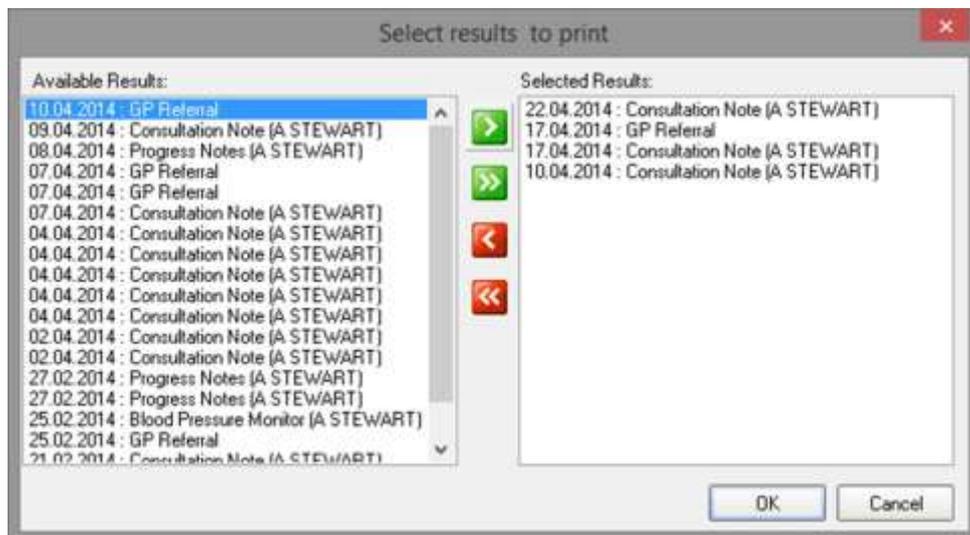


To print a patient's report, first follow the steps on 'To Find a Patient Chart' section to look up the patient. Once that is complete, select file from the toolbar.



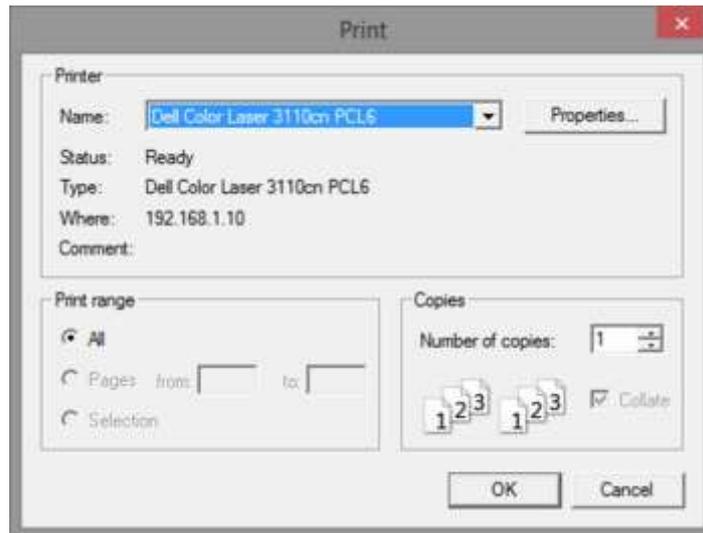
There are a few options to print. For a single report, either select **Print** in the tab (shortcut: Ctrl+P). To setup and preview the document before printing, select **Print Preview**. To print multiple reports, select **Print Multiple results**, where another window will appear and prompt you to select the reports. Use the set of arrows between the two lists to select the results being printed. The single arrows will only move the selected result, while the double arrows will move all of the results.

Press OK when done.



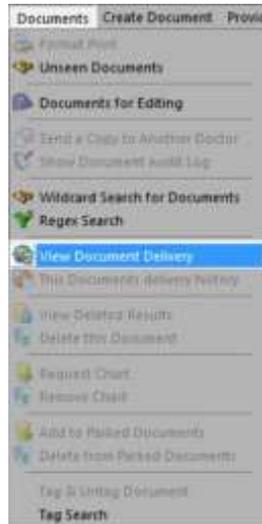


To print a Provider's details, first follow the steps on 'How to look up a Doctor' section to look up the provider. Once that is complete, select **File** from the toolbar. From here the page can be printed in a variety of ways. The first option can be accessed by selecting **Print** (shortcut: Ctrl + P). Secondly the page can be previewed before printing through **Print Review**. Lastly **Print Setup** can be selected to choose the printer and to print multiple copies. Click **Ok** when done.



View Document Delivery

To see reports, letters or results that have been sent out through the explorer software, select **View Document Delivery** from the **Documents Menu**



This tool has a few search options. It can search for results within a given date range, search for a specific patient, or for a specific doctor. To search by date, type in or select from the dropdown menu in the first and second boxes of the View Sent Messages window. To search for a specific patient, input their surname and first name in **Surname** and **First name** fields. To search for only results that have been sent to a specific doctor, regardless of time, choose Lookup

→ Look up Staff Records at the bottom of the window.

Searching by a specific patient and by a specific doctor can be combined to find a specific patient result sent to a specific doctor.

A screenshot of a dialog box titled 'View Sent messages'. It contains the following fields and controls: 'Start date' dropdown with '7/05/2014', 'End date' dropdown with '8/05/2014', 'Max matches' spinner set to '100', 'Surname' text box, 'First name' text box, and a large empty text area labeled 'To these providers'. At the bottom, there are buttons for 'Delete', 'Edit', 'Insert', 'Lookup' (with a dropdown arrow), 'OK', and 'Cancel'.

Interpretation of the Results Page

If the Delivery Type states Capricorn, the Application ACK field identifies if the result has been consumed by the practice software. If there is no Application ACK present for the result then the time in the Delivered column only denotes that the time that the message was saved to their system, not that their Practice software has imported the result.

Report Title	Delivered	Report Link	Copy For	Patient	Observation Date	Delivery Type	Reviewed	Result status/Application ACK
IP Referral	3.4.2014 09:23	Retrieve	STEWART, AMY (A54558002G)	SMITH, John (DOB: 23.11.1963)	25.2.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (A STEWART)	3.4.2014 09:58	Retrieve	STEWART, AMY (A54558002G)	SMITH, John (DOB: 23.11.1963)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
Consultation Note (H GREIG)	3.4.2014 10:55	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 12.12.1990)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (H GREIG)	3.4.2014 09:33	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 12.12.1990)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
Consultation Note (I HEDDIN)		Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 1.1.1980)	3.4.2014 00:00			Final result
Consultation Note (D GALVIN)	3.4.2014 11:21	Retrieve	STEWART, AMY (A54558002G)	TEST, Patient (DOB: 1.1.2001)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
Consultation Note (I HEDDIN)	3.4.2014 12:14	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 1.1.1980)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (D GALVIN)	3.4.2014 13:39	Retrieve	STEWART, AMY (A54558002G)	TEST, Patient (DOB: 1.1.2001)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
Consultation Note (I HEDDIN)	3.4.2014 12:11	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 11.11.1990)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (D GALVIN)	3.4.2014 16:11	Retrieve	STEWART, AMY (A54558002G)	TEST, Patient (DOB: 1.1.2001)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
	3.4.2014 14:42	Retrieve	FAH, JASON (JF4559000Q)	COMMAND, Mr (DOB:)	3.4.2014 14:42	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (I HEDDIN)		Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 11.11.1990)	3.4.2014 00:00			Final result
Consultation Note (I HEDDIN)	3.4.2014 17:34	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 11.11.1990)	3.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21
Consultation Note (I HEDDIN)	4.4.2014 10:27	Retrieve	STEWART, AMY (A54558002G)	PATIENT, Test (DOB: 1.1.1980)	4.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:20
Consultation Note (A STEWART)	4.4.2014 09:32	Retrieve	STEWART, AMY (A54558002G)	SMITH, John (DOB: 23.11.1963)	4.4.2014 00:00	CAPRICORN	N/A	Final result: MDS.15.1 @ 3.4.2014 12:21

If the Delivery Type states Equator, the Reviewed field identifies if the result has been viewed in their Medical Objects software. If there is an Application ACK present for the result it means that they may be viewing their results in more than one software package. In the case of the Equator, results only showing a date in the Delivered column and not the reviewed column means that the result has been delivered to the practice but not yet read.