



Medtech Australia

Outbox Documents Guide



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Introduction

Within Medtech32 are the standard documents which are predefined with merge fields. The documents themselves are accessed via the Patient's **Patient Manager ► Outbox** screen, or the **New Document icon**.

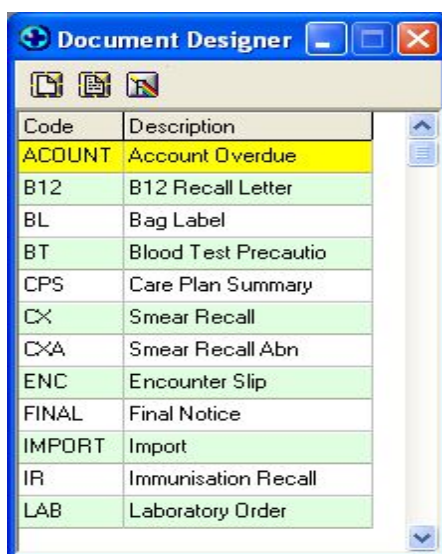
This document covers the creation of new Outbox Documents, so that customised documents can be set up for all users, or just individual users.

The possible Merge Fields that can be imported in to the documents are varied and have been grouped together in clusters, for ease of selection.

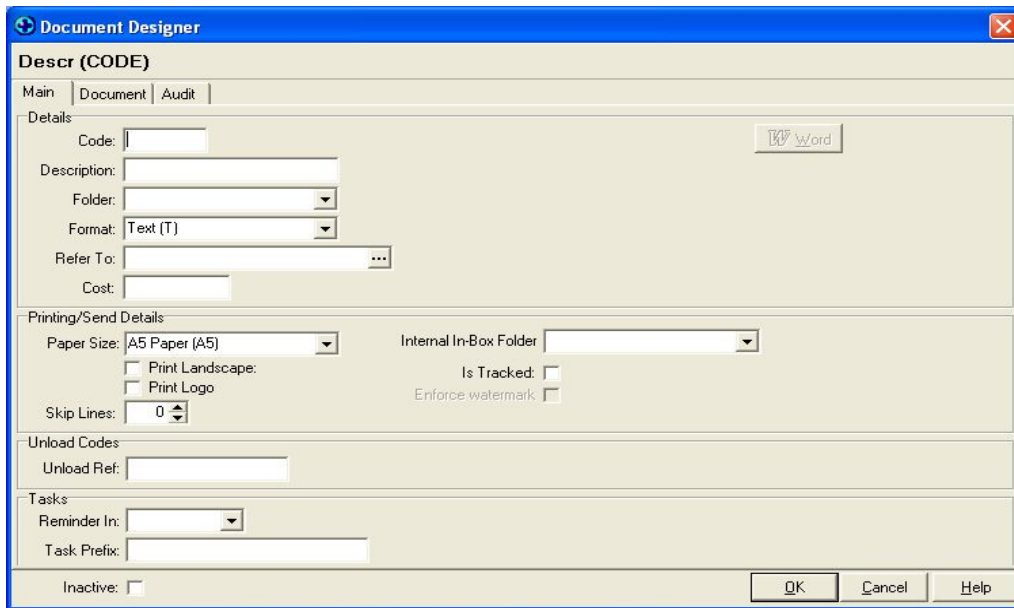
NOTE: As the creation of the Document Templates requires access to the **Setup** menu, it is assumed that the reader has the required Security level.

Add a New Outbox Document

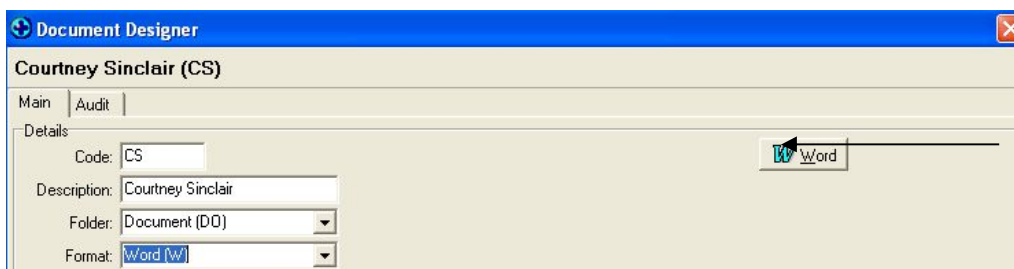
1. Select **Setup ► In / Outbox ► Outbox Document**. The **Document Designer** window will be displayed.



2. Select **Document ► New, Ctrl+N** or click the **Add a new Document icon** . The **Document Designer** window will be displayed.



3. Type a unique code to identify the Outbox Document in the **Code** field (eg the initials of the description).
4. Enter the name of the document into the **Description** field.
5. Select the Outbox Folder the document will be linked to from the **Folder** dropdown list.
6. Select the format of the document from the **Format** dropdown list. If **Word** is selected a link to this application will appear in the right of the screen which will enable you to setup the document within Word.



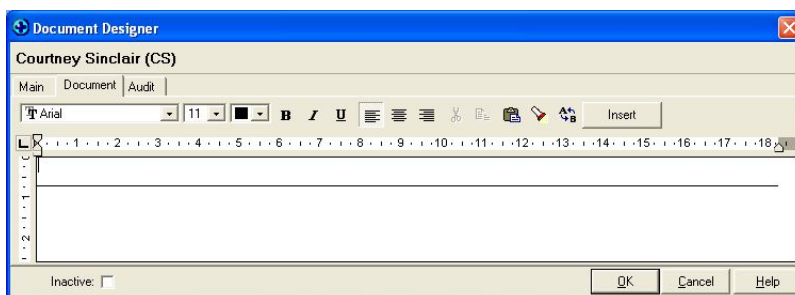
7. If necessary, select the entry from the address book that the document will be sent to using the **ellipsis** button next to the **Refer To** field.
8. A cost can be added into the **Cost** field; however this is not linked to the accounting module in any way.
9. Select the required paper size from the **Paper Size** dropdown list.

10. If landscape printing is required select the **Print Landscape** tick box, if this is not selected, the document will print in portrait format.
11. If the practice or provider logo is to be printed on the document, select the **Print Logo** tick box.
12. If the document should skip a certain amount of lines before printing the document, type the number of lines to skip in the **Skip Lines** field. This may be used if printing on pre-printed letter head paper.
13. If necessary, select a relevant folder from the **Internal In-Box Folder** dropdown list if the document is to be used as an internal referral. Eg LAB for Laboratory document. Within the New / View Document window, when selecting an internal provider to send the document to, a copy is automatically placed into the Provider's Inbox.
14. If the documents status is to be tracked, select the **Is Tracked** tick box.

This will enable the **Enforce Watermark** tick box. Select this tick box if a watermark of the documents status is to be displayed when printing.

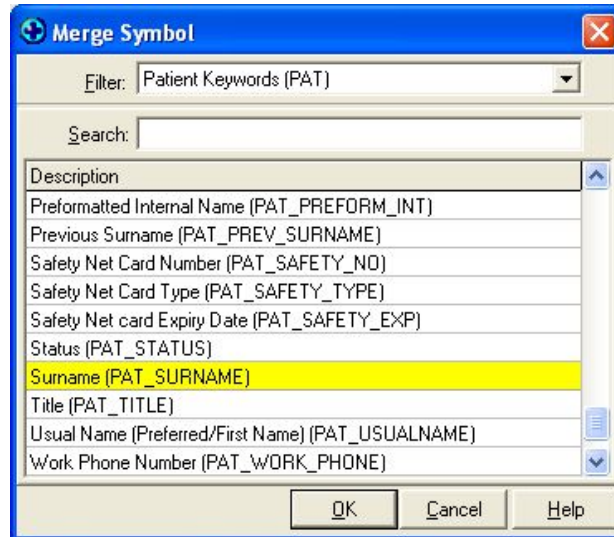
15. If the document is exported to other applications, place the applicable code in the **Unload Ref** field.
16. If a task is to be added to the Patient and Provider Inbox's regarding this document, select how far into the future this should be, from the **Reminder In** dropdown list.

Enter the task name into the **Task Prefix** field.
17. If **Text** was selected from the **Format** dropdown list (step 6), select the **Document** tab. If Word was selected, move to step 18.



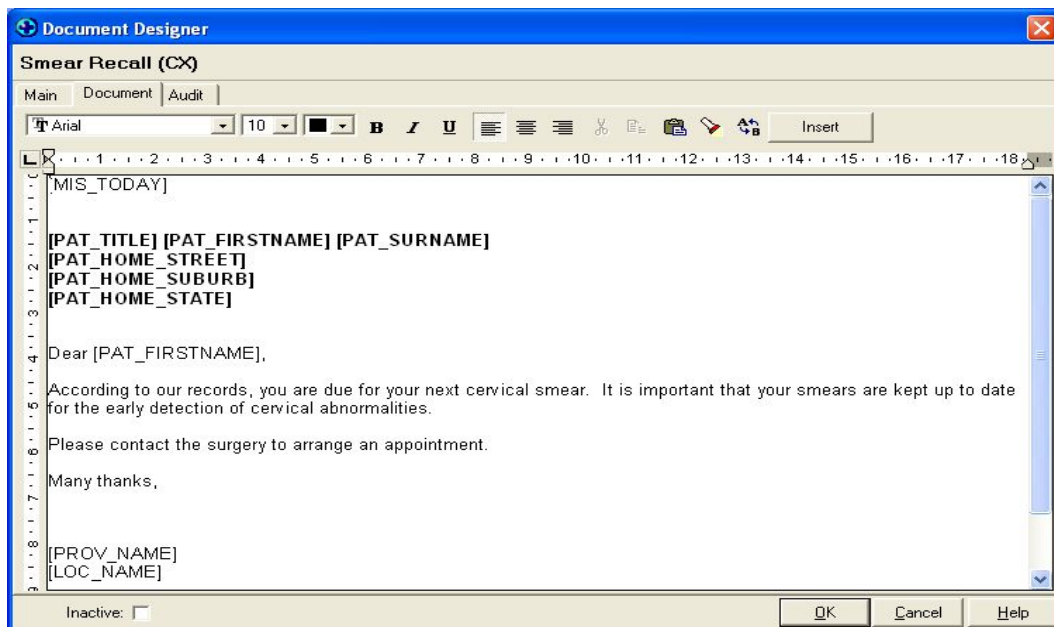
The design of the document is setup within the Document tab. Non merge information (i.e. the details that will remain constant and appear on every letter regardless of the patient) can be typed directly into the white field.

When a merge field is required (eg the patients surname), place the cursor in the document where the field is required and click the **Insert** button. The **Merge Symbol** window will be displayed.



Highlight the required merge field (the **Filter** dropdown list may need to be used) and click **OK**. The merge field will be inserted into the document at the location of the cursor.

Sample of a completed smear recall document.






Note

Text can be formatted using standard windows functionality. Icons to make the text a different style, size, and colour are located above the top ruler. Other formatting features are also available from this toolbar, if unsure what the icons mean, float the mouse over them for a tool tip.

18. If **Word** was selected from the **Format** dropdown list (step 6), select the **Word** button located in the top right corner of the Main tab. This will open Word.
19. Construct the document and select **File ► Save**. Once saved, then select **File ► Close**.
20. Once the document is designed click **OK**.

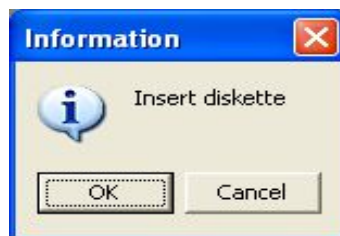
View / Modify or Inactivate an Outbox Document

1. Select **Setup ► In / Outbox ► Outbox Document**. The **Document Designer** window will be displayed.
2. Highlight the Outbox Document to be viewed, modified or inactivated.
3. Select **Document ► Open, Ctrl+O** or click the **Open an existing Document** icon . The **Document Designer** window will be displayed. The **Code** field is locked and cannot be changed.
4. View and / or make modifications as necessary. If the selected Outbox Document is to be inactivated, select the **Inactive** tick box.
5. Click **OK** or press **Enter**.

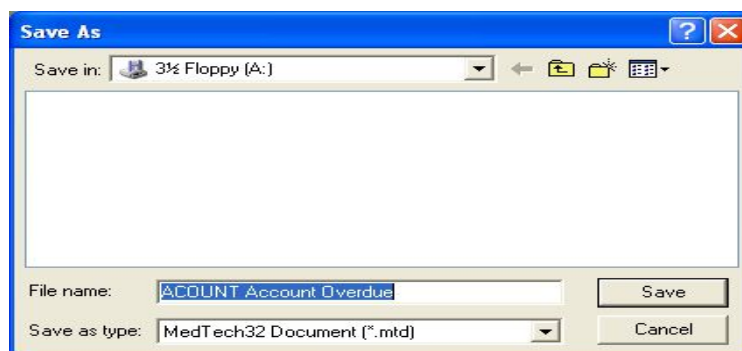
Export Outbox Document

Outbox Documents can be exported from MedTech32 which will enable others to use the same document. The other site should check that there is not a conflict with the codes of their existing documents.

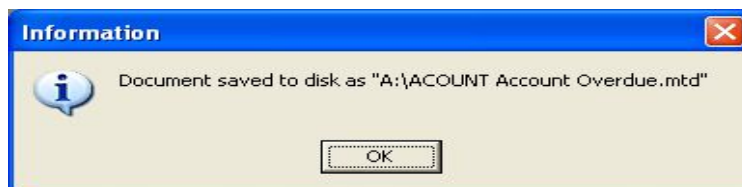
1. Select **Setup ► In / Outbox ► Outbox Document**. The **Document Designer** window will be displayed.
2. Highlight the Outbox Document to be exported.
3. Select **Document ► Export Disc**. An **Information** window will be displayed.



4. Insert the disc the document is to be exported to.
5. Click **OK** or press **Enter**. The **Save As** window will be displayed.



6. Click **Save**. An **Information** window will be displayed.



7. Click **OK** or press **Enter**.

Import Outbox Document

Outbox Documents setup within other MedTech32 databases can be added to your system by importing them. However, it is advisable to check that there is not a conflict between codes of existing documents before importing.

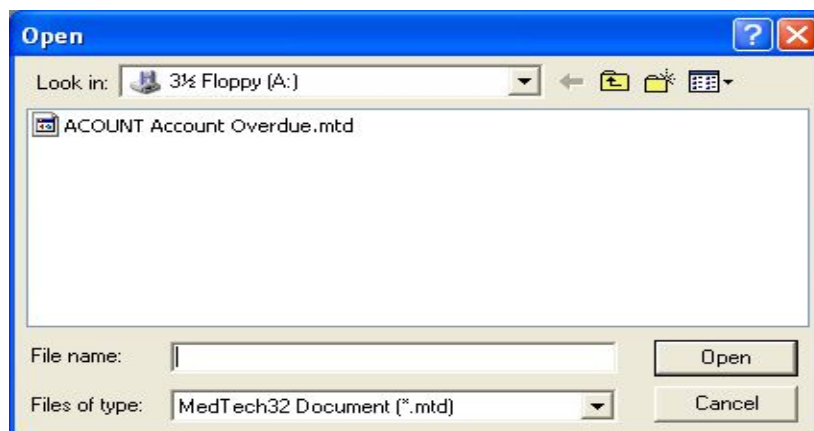
If the Document Template is one of our existing Document Templates from the **Medtech Global website** – www.medtechglobal.com , please download the selected Template and save it locally to your Desktop or another location on your machine.

Then log on to Medtech32 and follow the instructions detailed below:

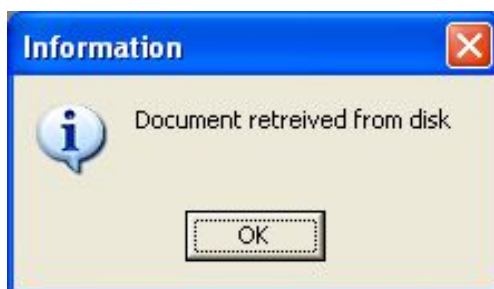
1. Go to the menu option - **Setup ► In / Outbox ► Outbox Document**. The **Document Designer** window will be displayed.
2. From the top main menu options - select **Document ► Import Disc**. An **Information** window will be displayed.



3. Either insert the disc/DVD/CD - from where the Outbox Document is to be imported from, or navigate to the folder location of where the file has been saved/stored.
4. Click **OK** or press **Enter**. The **Open** window will be displayed.



5. Highlight the document to be imported.
6. Click **Open**. An **Information** window will be displayed.



7. Click **OK** or press **Enter**. The Document Template has now been successfully saved in to your Medtech32 database and can be selected from the Outbox Document Template options now.

For further information on the Document Template process, or any other queries regarding the import/export process, please contact **Medtech Support** via:

- Email to support@medtechglobal.com
- Fax to **03 9690 8010** Attn: Medtech Support
 - Phone on **1300 362 333**