GUIDE FOR USING HEALTHLINK WITH MEDICAL DIRECTOR SOFTWARE

Please note, this information sheet is part of our Secure Messaging in General Practice suite of resources that includes videos and instructional information for explaining how to use Argus, ReferralNet or Healthlink for sending patient information using encrypted communications.

They are part of Western Victoria Primary Health Network's commitment to improving access to and use of digital health tools in western Victoria.

Access other resources in this series via our website: westvicphn.com.au/securemessaging

Before you begin

- Make sure you have installed the latest version of HealthLink SIX messaging system (HMS version 6.6.x) in your system.
- If you are unsure of anything or need assistance, please contact the HealthLink helpdesk on 1800 125 036.

Setting up HealthLink with MD3.14

- The Scheduled Document Import (SDI) utility provides Medical Director with the ability to automatically import messages. The user can configure SDI to run at a regular interval.

How SDI works

- When HealthLink SIX messaging is installed, it creates an interface file called **hms_config.xml** located in the C:\HLINK directory. The interface file contains the file path details for all the incoming and outgoing directories for the different message types. MD3.10 or later looks for this file on the local computer and uses the file to find the appropriate paths for its messages.

How to turn on SDI

- Click **Tools > Manage Communications>General Tab>General**
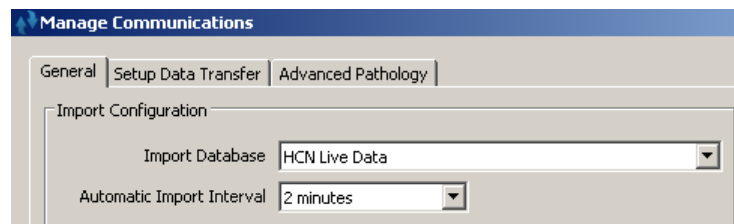
- Select **HCN Live Data** for the **Import Database** drop down box in **General** tab.
- Select the desired automatic import frequency from **Automatic Import Interval** drop down box.
- Click **Close** to the bottom left of the screen to save the changes.
- A pop-up screen will confirm if you would like to save the changes. Click **Yes** to confirm changes.
- A screen will pop up advising that the SDI will be tested click on OK for SDI to start trial import.
- When the test is successful Click **OK**.

How to turn off SDI

- Click **Tools > Manage Communications** and select **(disabled)** from the Import database drop down box.

Setting up HealthLink imports within MD3

Setting Up HealthLink Advance Options

- Go to **Start>All Programs> HealthLink Advance Options**
- Click on **Configuration>User Settings**
- Click on **Message Types** Tab
- Select **LAB2** message type and click on **Messages Stores** tab on lower half of the screen.
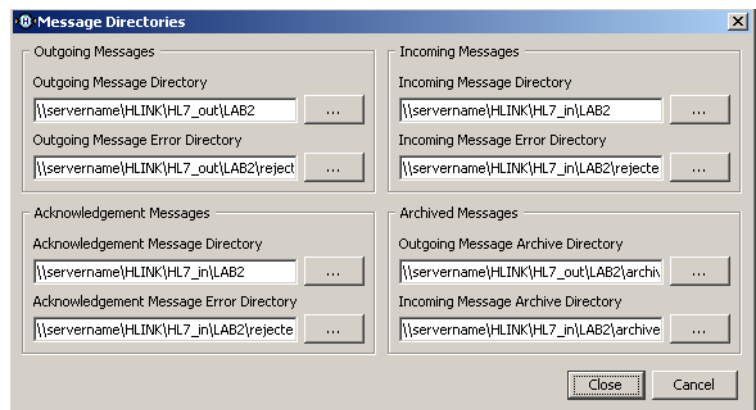
- Click the **Edit/More** button and change the **incoming** and **outgoing** file paths. Click the **Close** button to close the screen.
- Make the same changes to **RSDAU, PIT**, and **BROADCST** (if in Southern Australia).
- Click on **File>Save** All to save the changes made.
- Click on **File>Exit** to exit out of HealthLink Advance Options.

Setting up Medical Director Manage Communication

- From the Medical Director's main tool bar choose **Tools > Manage Communication**.

- In the General Tab, look up Recognised File extensions list for **REF**.

- If **REF** extension is not in the list, add **.REF** extension to the list.

- Click on **Setup Data Transfer** tab.
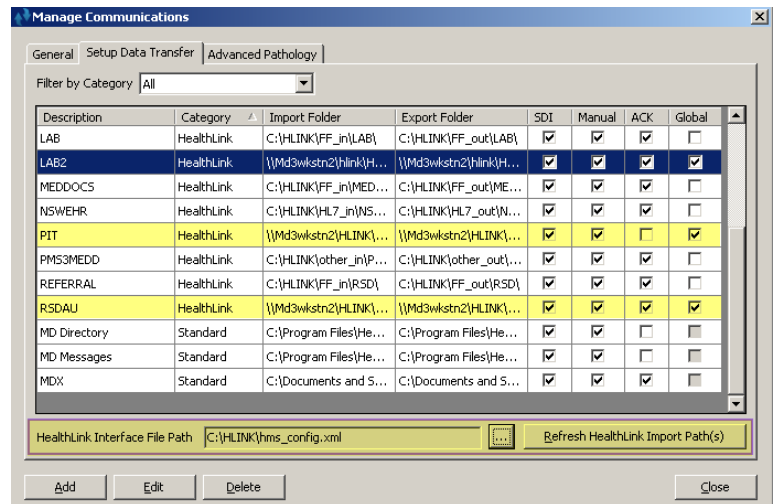
- MD3.14 will automatically look at **HealthLink Interface file** in **C:\HLINK**

- If HealthLink Six Message was not installed on the **C:** drive then browse to the **HLINK** folder and select the HealthLink Interface file **hms_config.xml**

- Click on the Refresh HealthLink Import Path(s) button to load the HealthLink settings. This will populate the Manage Communications settings with HealthLink file paths.

- Click on **Global** check boxes for **LAB2, RSDAU, PIT** and **BROADCST** (if in Southern Australia).

- Click on **ACK** boxes for, **PIT and BROADCST** (if in Southern Australia).

- Click on **Close** button to save changes.

NOTE: If any changes are made to HMS advanced options, refresh HealthLink import paths(s) from setup data transfer tab for MD3.14 to pick up the settings.

Setting up the RSDAU messaging

Filing Referrals, Specialist letters, Discharge Summaries

Incoming RSD messages (Referrals, Specialist letters, Discharge Summaries) can be filed in Documents within a patient's notes. Use the following steps, to set this up.

- From the main tool bar choose **Tools > Option**, select the **RSD** tab.

- Select File reports as **Documents.**

- Click on **Save.**
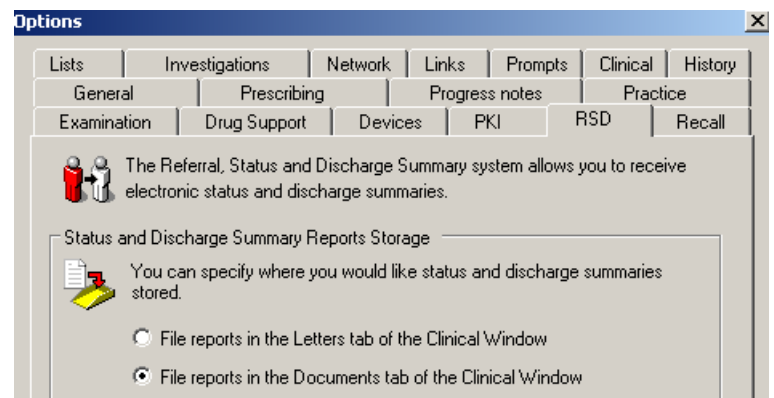
Testing your configuration

Generating Lab 2 test messages

- Open the HealthLink SIX Advanced Options

- From menu click **Utilities>Test Message Generator**. The **Test Message Generator** window will appear.

- Sending and receiving EDI account will automatically fill with the practice EDI.

- To generate **LAB2** messages click on LAB2 from **Message Types available to you** and then on **Generate Test Message** button.
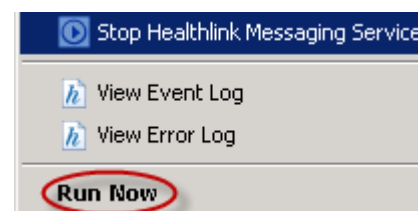
Generating RSDAU test messages

- To generate **RSDAU** message click RSDAU from **Message Types available to you** and then click on **Generate Test Message** button.

- Click on File and Exit to close the Healthlink Advanced Options.

Making HealthLink connection manually

- From system tray, right click on HealthLink Icon

- Left click on **Run Now** to make the manual connection.

- A spinning 'H' indicates the HealthLink application has started its connection.

- Once the 'H' stops spinning, the HealthLink connection has been completed and the test messages are downloaded into their respective incoming folders for **Medical Director** to import.

Checking Messages in MD3

- To check message into MD3, press the F5 key or alternatively, from the MD3 menu, click **Investigations > Check Holding File** (message import is done automatically if SDI functionality is on).

NOTE: It is advisable not to use **F4** key from the keyboard to manual import, since SDI functionality can be scheduled to desired interval to import the diagnostic reports, referrals and discharge summaries automatically.

- Select the name of the doctor for which you want to view the investigation results and click the **OK** button

- A list of the current messages will be displayed with message preview. To get to a full preview double click on the message you want a full preview off.

NOTE: The inbox in MD 3.14 provides the user with a options such as Assigning Reports, Deleting one or more messages etc from the preview screen. Message preview can be changed using the preview button on the top left hand corner.

Disabling HCN Service Manager

If the practise has started using a new clinical software system, it is possible that HCN Service Manager may still be running hence pulling the messages out of default Healthlink SIX messaging folders.

To stop messages been pulled by HCN Service Manager. HCN Service Manager needs to be disabled.

This service starts automatically and to stop this service change the **startup type** to '**disabled'**.

- Click **Start > Run**. In the Run window type **services.msc** and click the **OK** button.
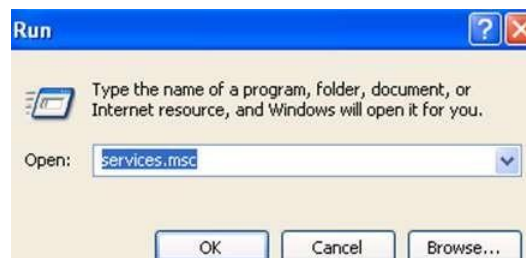
- From the service screen look for **HCN Service Manager** and double, left click to open **HCN Service Manager Properties** window, as shown.
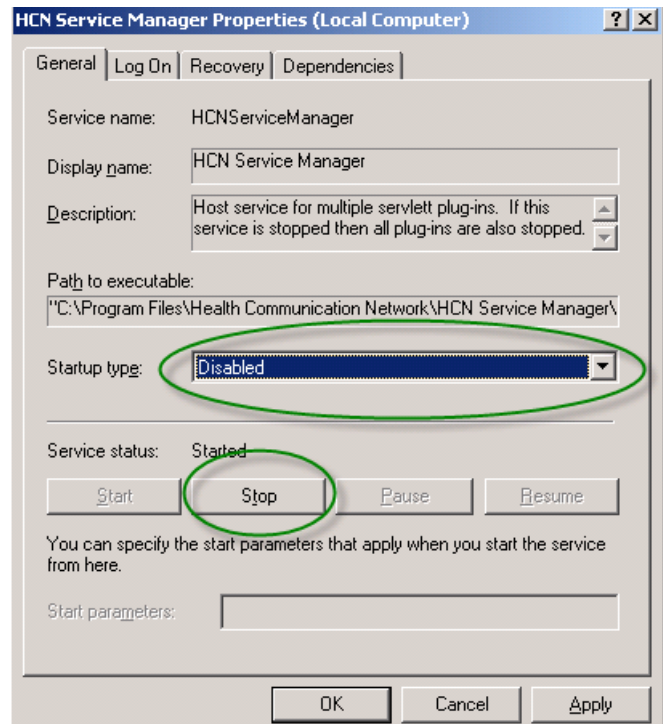
- Select **Disabled** from the **Startup type**.
- Click **Stop** from the Service status and then click the **OK** button.

Setting up Address Book

NOTE: Each Specialist or GP that you wish to send referrals to needs to have an address book entry with a MDX Facility ID in Medical Directory Systems. In the address book a site has a facility ID if there is an icon against the address details.

Before you begin

You will need to be registered to use MDExchange with Medical Director. You will also need to check that your registration includes being able to send.

- To check, select
  Tools>MDExchange>Licence details

- If the status does not show as registered or shows **receive** only, you will need to follow the on-screen registration instructions or contact Medical Director.

Adding a New Specialist or GP to the MDExchange Address Book

- Select **Patient>Open** (F2) you need to be in a patients record to add the facility ID (messaging address).

- Search for a patient (any patient – suggest a test patient).
- Highlight the patient and select **OK.**

- Once you have the patient record open you will need to open a blank patient letter. You need to be in this area to add GPs and Specialist to the MDExchange address book. You do not need to write an actual letter.
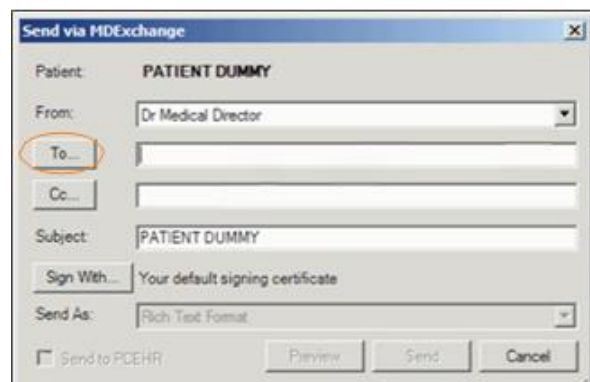
- Select **Tools>Letter Writer** (F8) or the icon.

- Click **File>Send** via MDExchange or the icon.
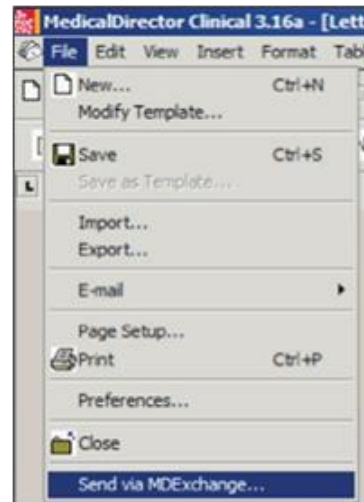
- Select **To.**

- Select the **Online Search Results** tab.
- In the Select MDExchange recipient window, enter the facility ID. The facility ID is also known as the EDI or Messaging Address. The facility ID is the HealthLink EDI for the provider/clinic you wish to send the referral to.
- You are able to locate the EDI through HealthLink's online database. If you do not have access, please call the HealthLink helpdesk on 1800 125 036.
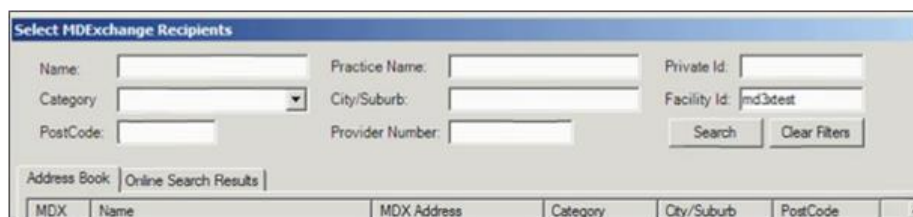
NOTE: the facility ID must be accurate to bring up the correct details.

- Select **Search**. The search should bring up the information belonging to the facility ID.
- Highlight the information displayed.
- Double click on the highlighted name from the list.

- In the **Matching Addresses Found** window, click on **Add to** save the selected provider/clinic to the local address book. If there is no entry in your address book to match the address to when you double-click on the highlighted name from the list, it will automatically add it to the address book.
- This will save the details to the address book along with the Facility ID icon.

- Once the icon appears next to the name of the site you are now able to send to that site using HealthLink via MDExchange.

Creating and sending letters and referrals

Before you begin

Each Specialist or GP that you wish to send referrals to needs to have an address book entry with a MDX Facility ID in Medical Directory Systems. In the address book a site has a facility ID if there is an icon against the address details.

You will need to be registered to use MDExchange with Medical Director. You will also need to check that your registration includes being able to send.

- Select **Tools>MDExchange>Licence Details.**
- If the status does not show as registered or shows 'receive' only, you will need to follow the on-screen registration instructions or contact Medical Director.

Creating a new referral or letter

- Select **Patient>Open (F2).**
- Search for the patient you wish to send the referral or letter for.

- Highlight the patient and select **OK.**

- Select **Tools > Letter Writer (F8)** or the icon .

- Select **File > New (Ctrl +N)** or the icon .
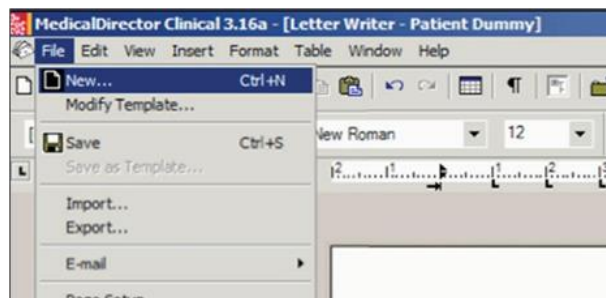
- Select the name of your required templates from any of the tabs and select **OK.**
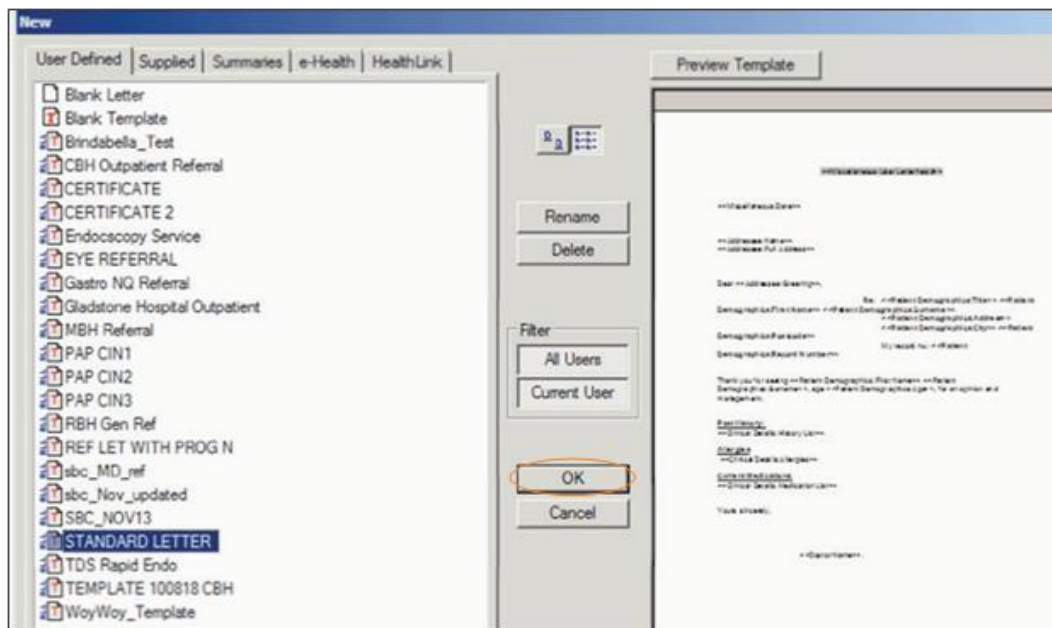
- Complete the letter or template as required, eg adding the addressee.
- Review your completed document. Any changes can be updated directly into the template.
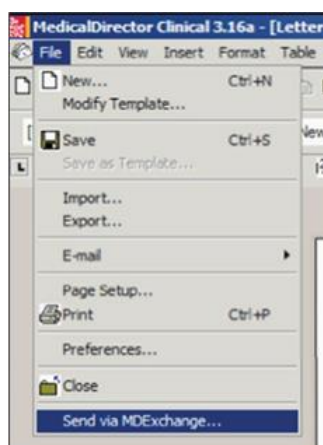
Sending your letter or referral

Once you have finished making changes to the letter or referral, you can send your message using MDExchange.

- Click on **File > Send via MDExchange** or click the icon located on the toolbar.

- Select **To**.

- Select the **Address Book** tab.
- Enter the name of the provider or clinic. The sites information will be shown.
- Highlight the recipient and select **To**.

NOTE: If the icon does not appear next to the addressee, you will need to add them into the MDExchange address book. You are unable to send to this site using the **HealthLink via MDExchange** if the icon does not appear next to the address.

- The addressee's details should appear in the **Recipients To** area.
- Select **OK.**

- In the **Send as** section select **Plain Text**.
- Select **Send**.
- If you wish to add a Cc, please do so before you select send. See instructions for adding Cc in the next section.

- You will see a bar showing the message being sent.
- Once the message has been sent, you will be taken back to the patient's record and it will show the details under the **Letters** tab.

Adding a Cc

- Select **Cc.**
- Select the **Address Book** tab.
- Enter the name of the provider or clinic. The sites information will be shown.
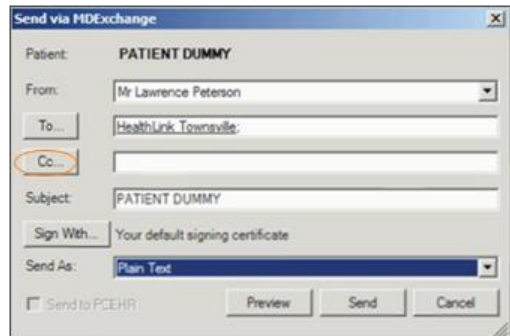
- Highlight the recipient and select **Cc.**
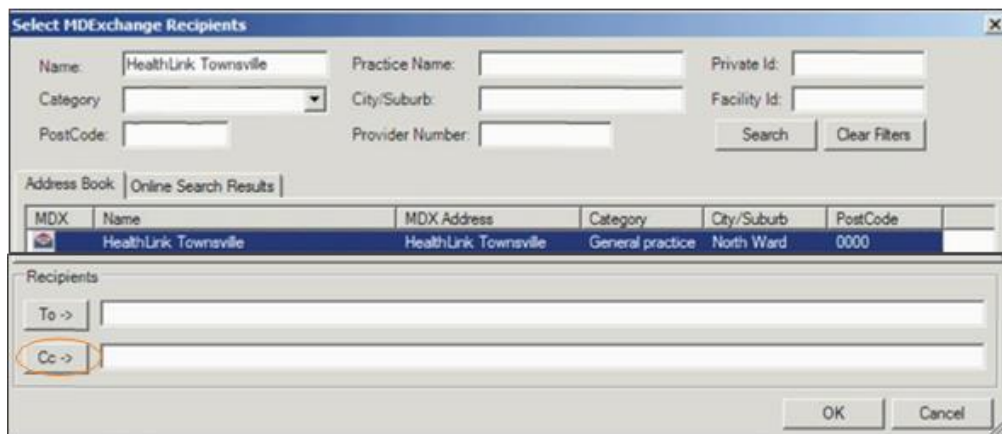
NOTE: If the icon does not appear next to the addressee you will need to add them into the MDExchange address book. You are unable to send to this site using the **HealthLink via MDExchange** if the icon does not appear next to the address.

- The addressee's details should appear in the **Recipients Cc** area.
- Select **OK**.
- You can add more than one Cc by repeating steps above.

- Select **Send.**
- You will see a bar showing the message being sent.
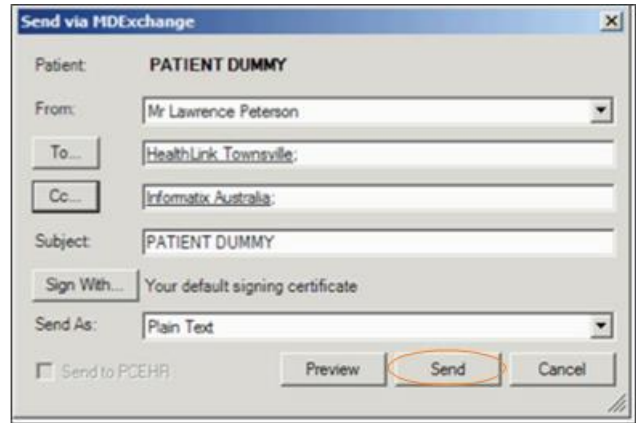
- Once the message has been sent you will be taken back to the patient's record and it will show the details under the **Letters** tab.

Tracking sent messages

It is important if you are sending referrals or any other types of messages, to check that they are being received by the recipient.

- Once you have sent a message the recipient's system will inform you by way of an acknowledgement. There are two ways of viewing the status of a patient's e-referrals. Select **Tools > MDExchange > Sent items.**
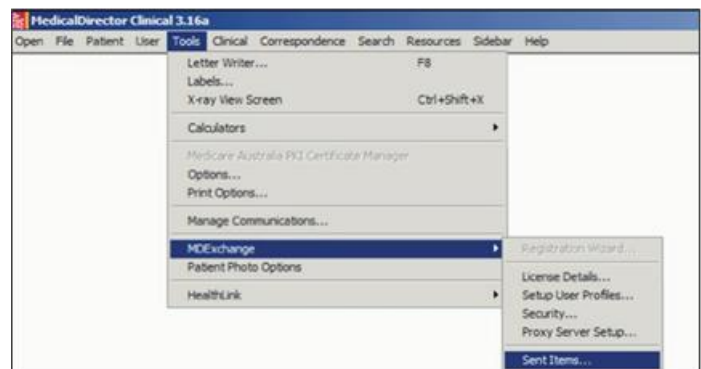
- This will show the status of all messages send including Cc's. You can use the filters to make a more

individualised search.

- Within the patients file, select the **MDExchange** tab. This will show only the open patient's e-referrals. This will show the status of the messages sent including any Cc's.

The status of the referral sent will be updated as follows:

Status	Message progress
Awaiting Transmission	The message is sent to the practice server.
Sent	Referral is sent from your practice server to the MDExchange server.
Transferred to HealthLink	Referral is sent from MDExchange to HealthLink.
Accepted	The provider or clinic has successfully received your referral.
Failed Transferring to HealthLink	Connection between MDExchange and HealthLink has been unsuccessful. Contact HealthLink for further assistance.
Rejected by HealthLink	Incorrect EDI address or message failed HealthLink validation. Contact HealthLink for further assistance.

Viewing incoming reports and referrals

Message importing

Message import is done automatically if the SDI functionality is on.

- Select **Correspondence > Check Holding File (F5)**.
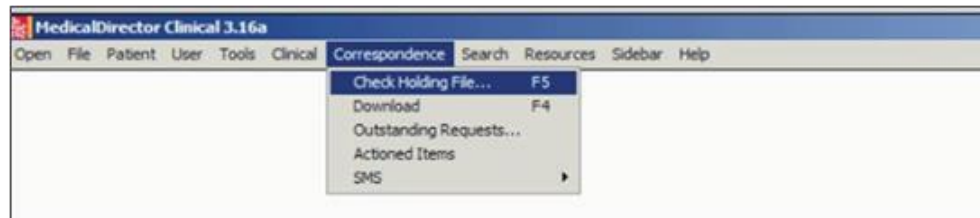
- Select the name of the doctor for which you want to view the correspondence. You can choose more than one doctor at a time by clicking on the doctor's name and highlighting. You can also view all incoming correspondence by clicking on and highlighting **All Recipients**.
- Select **OK.**

NOTE: The way the sending site has the doctor entered into their address book will depend on how it will show up in the holding file. There may be more than one variation of the doctor's name that needs to be viewed.

- A list of the current messages will be displayed with the message preview. To get the full preview double click in the message.
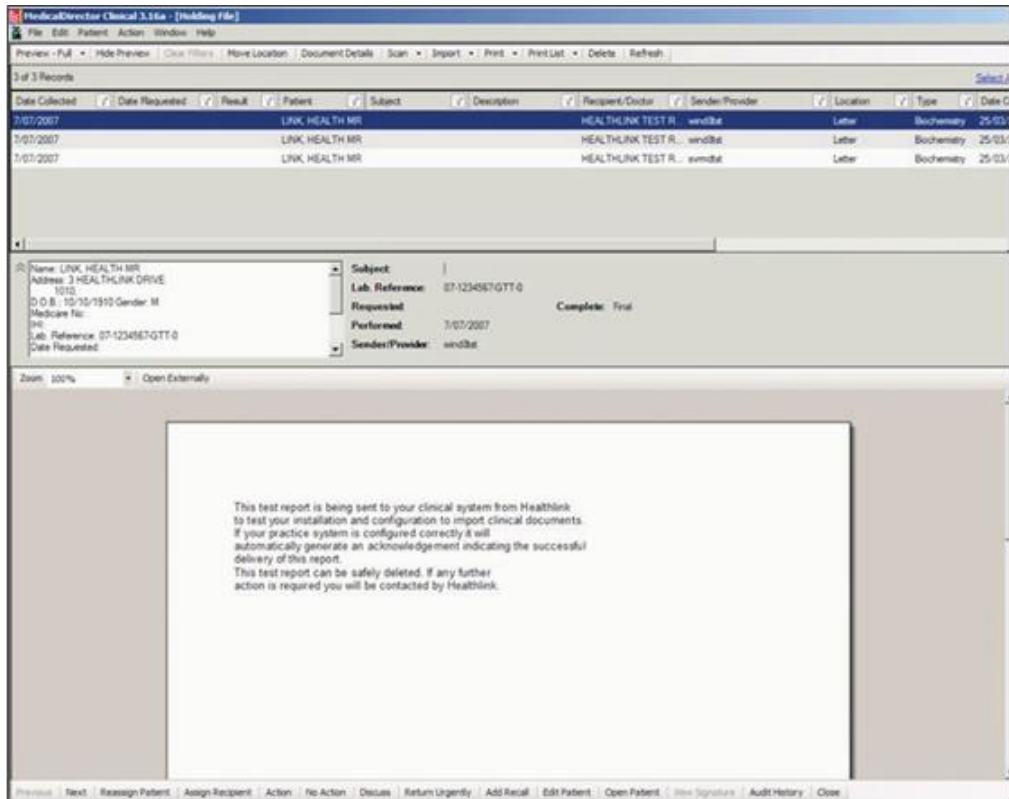
- Action correspondence as required using option bars.
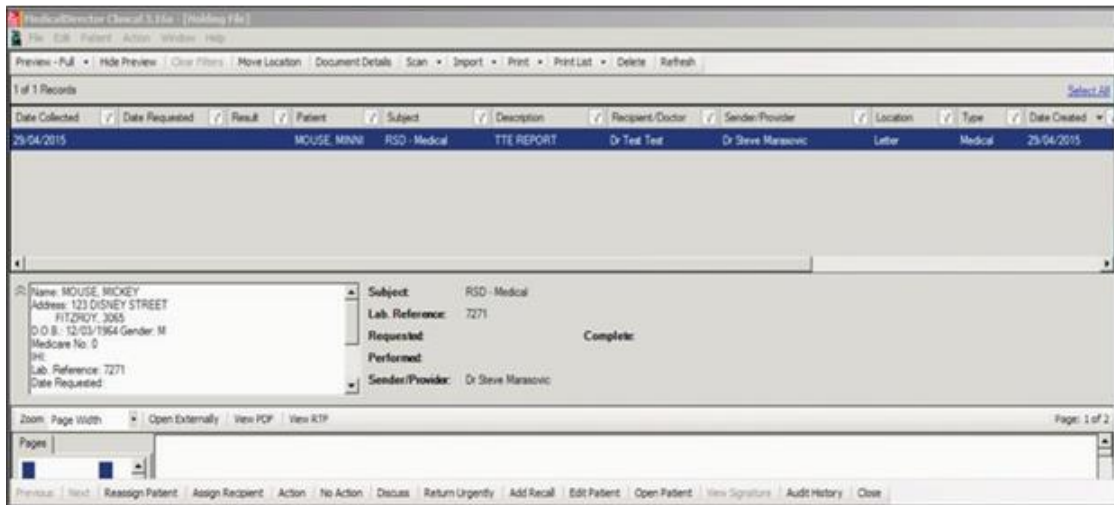
- Once all correspondence under the doctor's name has been actioned, the name will no longer appear in the holding file.