

Medical Director V3 – 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 years¹. Undertaking a regular review will greatly assist to maintain 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.

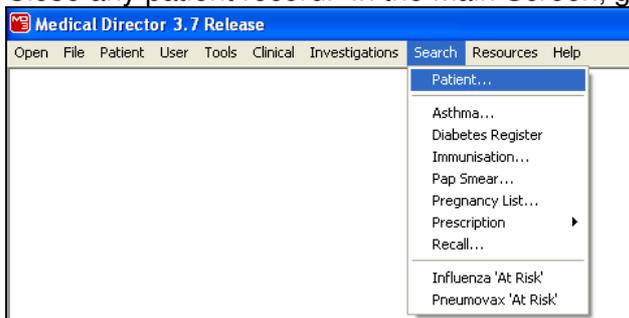
MD3 (version 3.7 onwards) has the ability to bulk inactivate patients in one simple step. No patients will be permanently deleted in this process.

Please Note:

- Back-up your current data before running this utility.
- 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:

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



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 screenshot shows the 'Patient Search' dialog box with the following settings:

- 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, Aboriginal and 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
- OR/NOT:** OR, NOT
- Seen By:** Seen By: Any doctor, From: 21/4/2008, To: 21/4/2008
- Not seen since:** Not seen since: 21/4/2006
- Custom Fields:** Custom Field 1, Custom Field 2, Custom Field 3
- Buttons:** Search (circled in red), Clear, Close

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- A list of patients will appear. Click on **inactivate patients** to inactivate all patients at once. A box will appear asking you to confirm. Note this action is only available if you have used the “Not seen since” search criteria.

Medical Director 3.7 Release - [Search Results]

All patients who have not been seen since 21/4/2006

Number of patients: 52

Setup search criteria

Surname	First name	Address	D.O.B.	Sex	Phone	Bus. Phone	Medicare No.	Pension No.	Cha
Andrews	Sally	21 BEST ST, PILL LAND 3123	12/05/1998	F	9882 3456				
Andrews	Norman J.	3 BEST ST, ST. KILDA 3107	02/06/1995	M	8182 5634		2294724171	QX128223	3648
Andrews	Jennifer S.	2 KENNEDY RD, DEMO TOWN 4523	20/04/1970	F	9123 4567	02 234 1294	3500265121		107
Andrews	Julie	5 JEFFERSON ST, PARKVILLE 3296	03/03/1956	F	234 6789	234 6789	6500225221		3452
Andrews	Maureen	3 BEST ST, ST. KILDA 3107	23/06/1923	F	8182 5634		2294724171	561-388-922-HL	3456
Bosich	Boris	88 BALMORAL DRIVE, BOORAGOON 6...	31/10/1953	M					
Churchill	Celine	450 CENTENIAL AVE, CARNARVON 6701	12/04/1943	F					
Connelly	Corine	54 CAMBERWELL BLVD, CRAIGIE 6025	05/07/1965	F					
Donnelly	George	43 MAIN ST, ADELAIDE 5678	02/07/1922	M	234 6789	234 8365	2294724441	QX121311	112
Duck	Donald	12 DISNEY STREET, DISNEYLAND		M			3500265121		
Dunning	Daryl	327 DARLINGHURST BLVD, DANDARA...	06/05/1965	M					
Elwood	Eileen	35A EDWARD ST, EMBLETON 6062	17/10/1953	F					
Ewing	Elaine	4/15 EZEKIAL CLOSE, ENEABBA 6518	01/10/1962	F					
Forrest	Frederick	44 FORREST PLACE, FORRESTFIELD ...	14/05/1921	M					
Forrest	Francine	44 FORREST PLACE, FORRESTFIELD ...	04/04/1927	F					
Frampton	Frank	80 FLIGHT ST, FALCON 6210	08/07/1935	M					
Freiburger	Fritz	15 FAULKNER AVE, FORRESTFIELD 60...	15/08/1944	M					
Freind	Florence	1/50 FREEMAN RD, FORRESTDALE 61...	15/05/1922	F					
Fromberg	Fraser	1444 FORREST ST, FLOREAT 6014	19/09/1972	M					
Holten	Hanna	10 HARLINGTON ROAD, HARVEY 6220	29/09/1945	F					
Ingham	Irene	2 ISLAND BAY ROAD, ILUKA 6028	02/06/1967	F					
James	Jane	28 JABIRU COURT, JANE BROOK 6056	28/11/1969	F					
Jandanski	Julie-Anne	555 JUNIPER WAY, JERRAMUNGUP 6...	26/04/1980	F					
Janke	Jelena	312 STERLING ST, SHARK BAY 6537	31/01/1979	F					
Jardine	Jean-Paul	44 JACARANDA DRIVE, JANDABUP 6065	27/10/1945	M					
Jefferson	Julia	10 JERVIS BAY ROAD, JOLIMONT 6014	23/09/1984	F					
Jennings	James	2 JOYOUS WAY, JERRAMUNGUP 6337	30/06/1966	M					
Jenson	Jeremy	1 JAMES ST, JANDAKOT 6164	03/01/1971	M					
Jeremiah	Josephine	24 JINDALEE RD, JOLIMONT 6014	24/05/1978	F					
Johnston	Jennifer	13/45 JOONDALUP DRIVE, JOONDALU...	14/08/1982	F					
Jones	Joan	333 JUMP DOWNS CLOSE, JANDAKOT ...	11/12/1948	F					
Lollie	Lillie	EASY STREET, HOME TOWN 4444		M			3500265121		
Minogue	Kylie	193 BLUFF ROAD, BENTLEY 6102	30/09/1986	F					
Minogue	Michael	193 BLUFF ROAD, BENTLEY 6102	04/07/1988	M					
Minogue	Rodney	193 BLUFF ROAD, BENTLEY 6102	19/09/1960	M					
Minogue	Danielle	193 BLUFF ROAD, BENTLEY 6102	04/02/1990	F					

Inactivate Patients Open Recall Save Print Labels Mail merge Close

How to inactivate patients individually

If you are notified that a patient is no longer at your Practice, then you can inactivate patients individually.

- From the **Main Screen**, call up the identified patient needing to be inactivated (F2).
- Click on the **Delete** button.
- The 'Delete Patient' window appears. Click the **Mark as Inactive** button. The patient record will be removed from the list.

Delete patient

Do you want to:

Mark as inactive

Mark as deceased

Delete permanently

Cancel

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How to activate inactive Patients

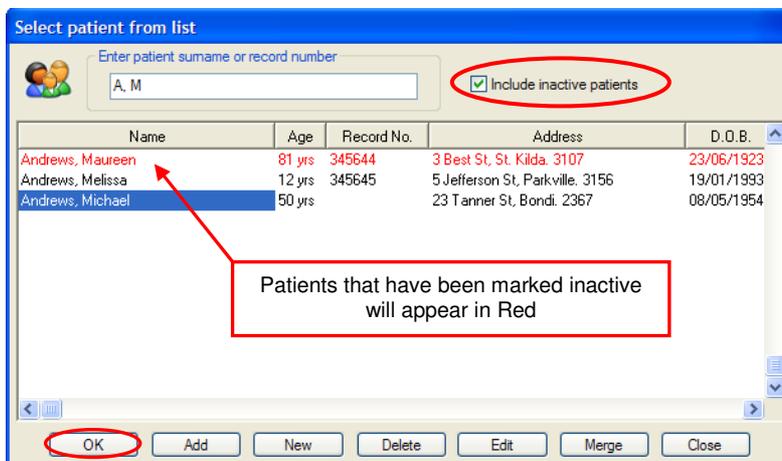
If a patient calls the practice and they do not appear to be on the database, ask them if they have attended before.

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

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

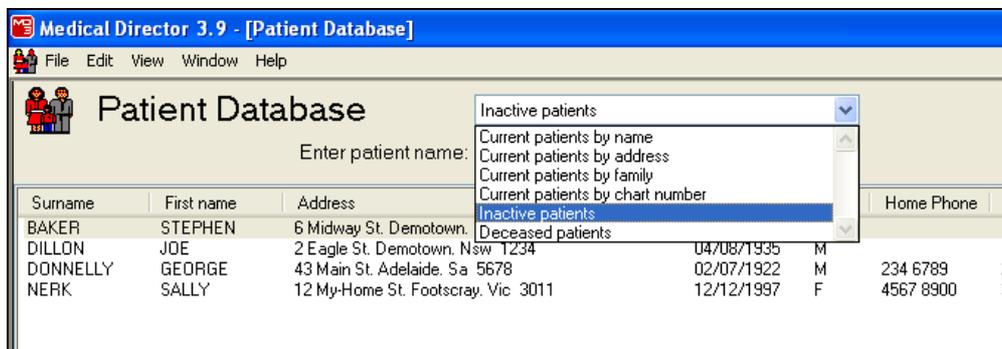
Select the required inactive patient and press **OK**.

Opening the patient record automatically flags the record as 'active'.



To View Inactive Patients

From the Main Menu, go to **List** and select **Patient Database (F10)**. The 'Patient Database' window will appear. Using the drop-down menu at the top of the Patient Database window, select **Inactive Patients**.



This screen may also be utilised to reactivate patients.

Highlight the patient in question and click the **Retrieve** button. Note that the retrieve button is only available when viewing inactive patients.

Note: Utilise Medical Director Help Menu to search further information.

Help → Medical Director → Search → Type 'Inactive Patients' → 'Display' → 'Select 'Patient Search' and 'Flagging Patients as Inactive'.

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.

¹ 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)