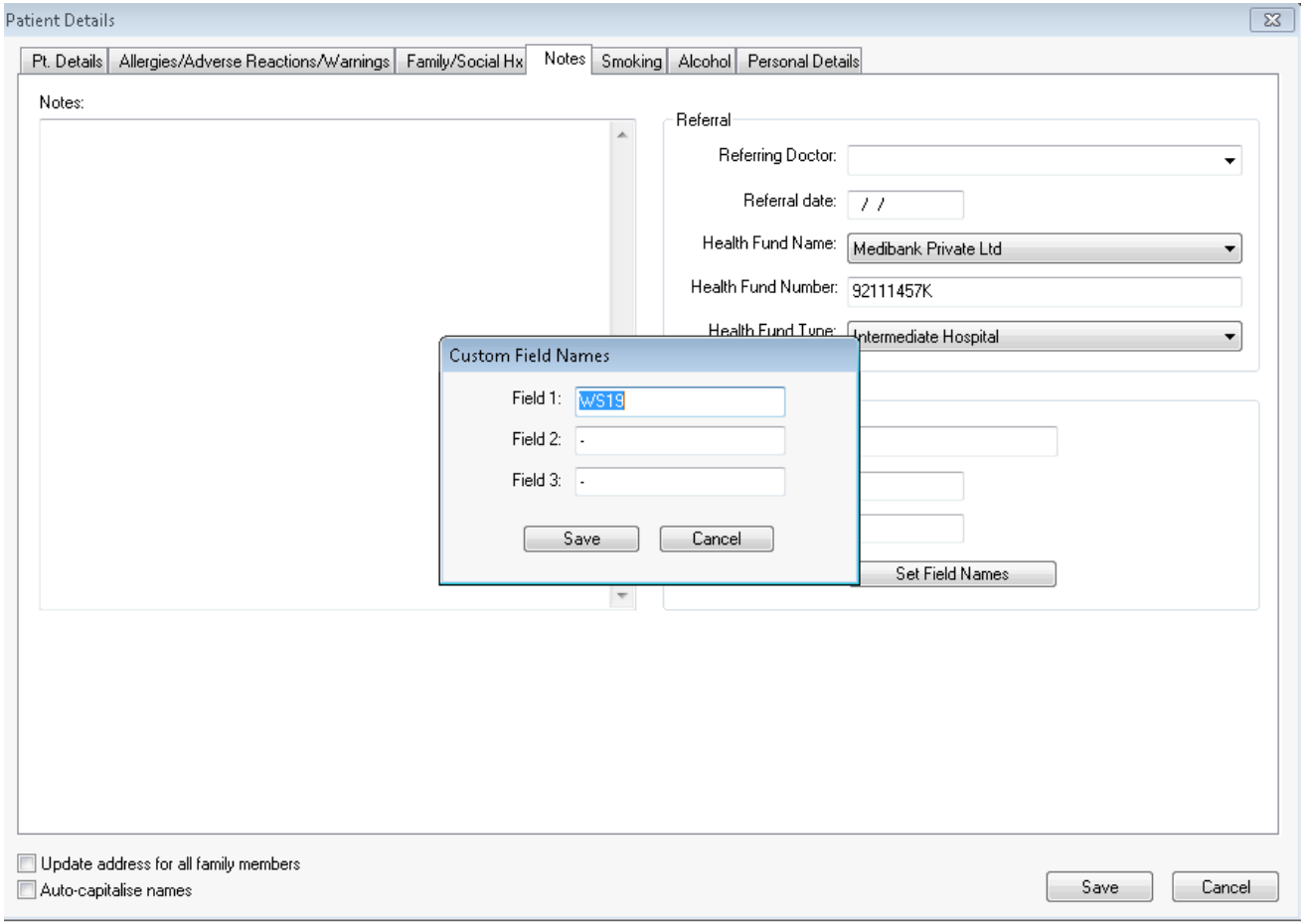
13. Medical Director How to keep track and enrol patients in the Winter Strategy

Part one: Creating a custom field in Medical Director

1. Open a patient file.
2. Open the 'Notes' Tab in the 'Patient details' screen. Patient→details→Notes
3. Click 'set Field Name'. In Field one write 'WS19' and press Save.



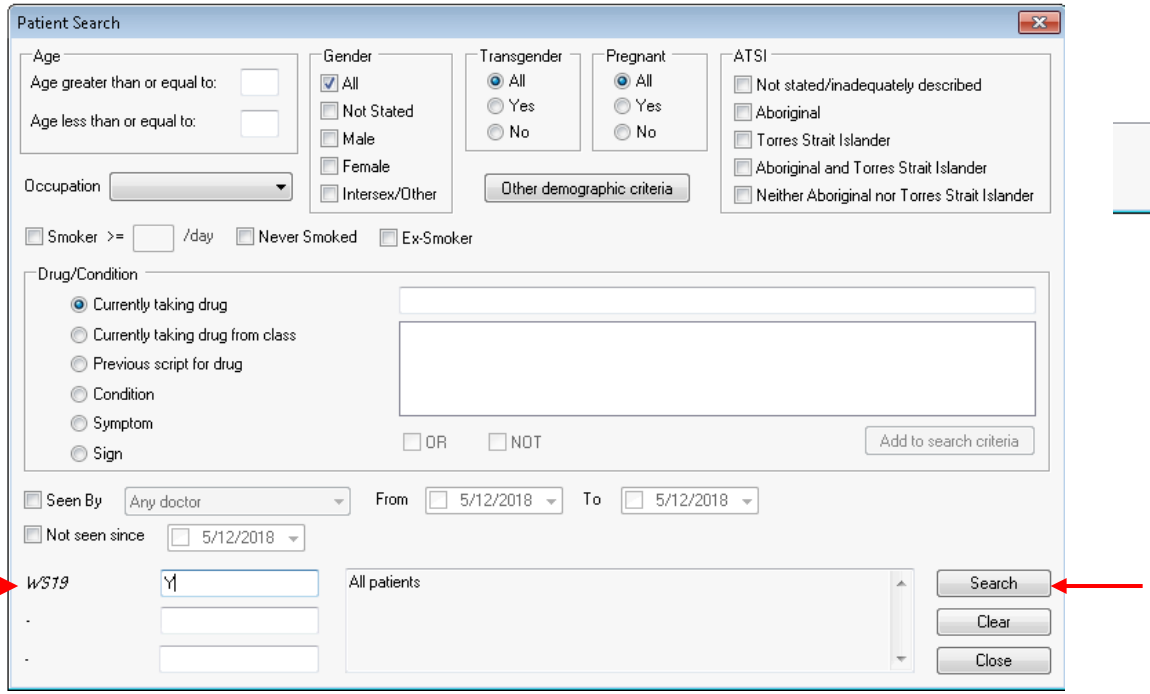
Enrolling the patient in Medical Director

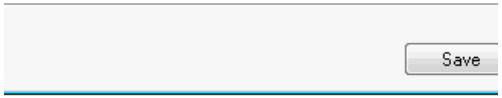
1. Once you have set up the custom field, received the patients consent form and patient survey you can put a Y for yes

Part two: Populating a list of patients enrolled in WS19 in Medical Director

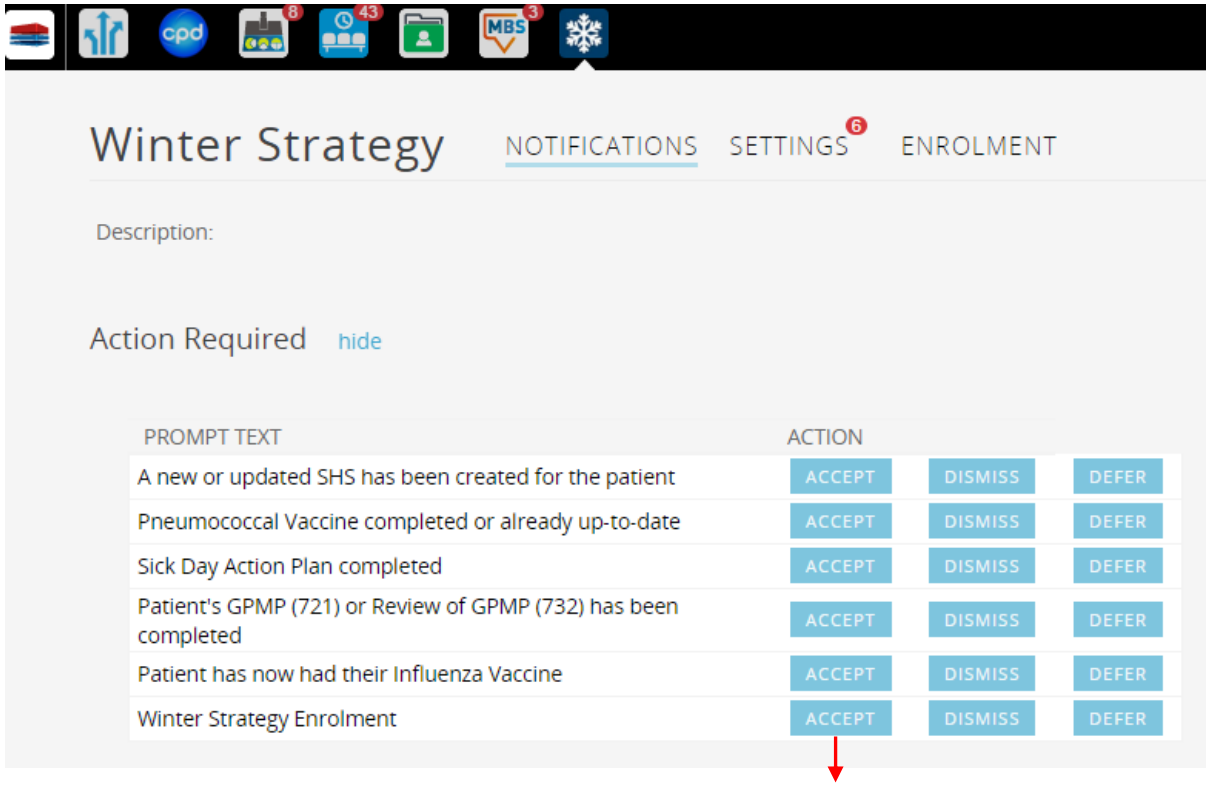
This list will show all of the patients enrolled in the winter strategy. It will assist you to commence the baseline audit.

1. Go to the main page homepage in Medical Director. Click Search→Patient
2. Type a 'Y' next to the 'WS19' custom field and click Search.
3. This will produce a list of patients that are enrolled in the strategy.

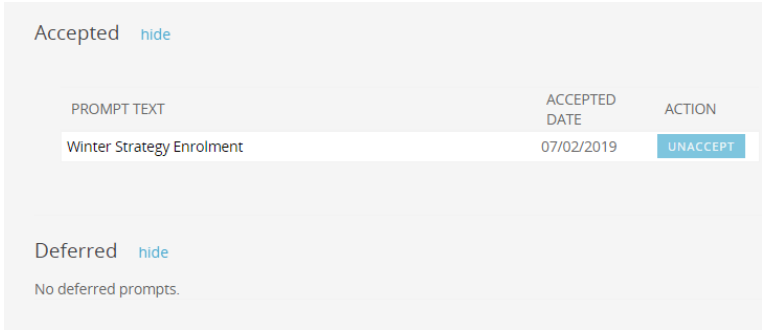




Part Three: Enrolling patients in Topbar

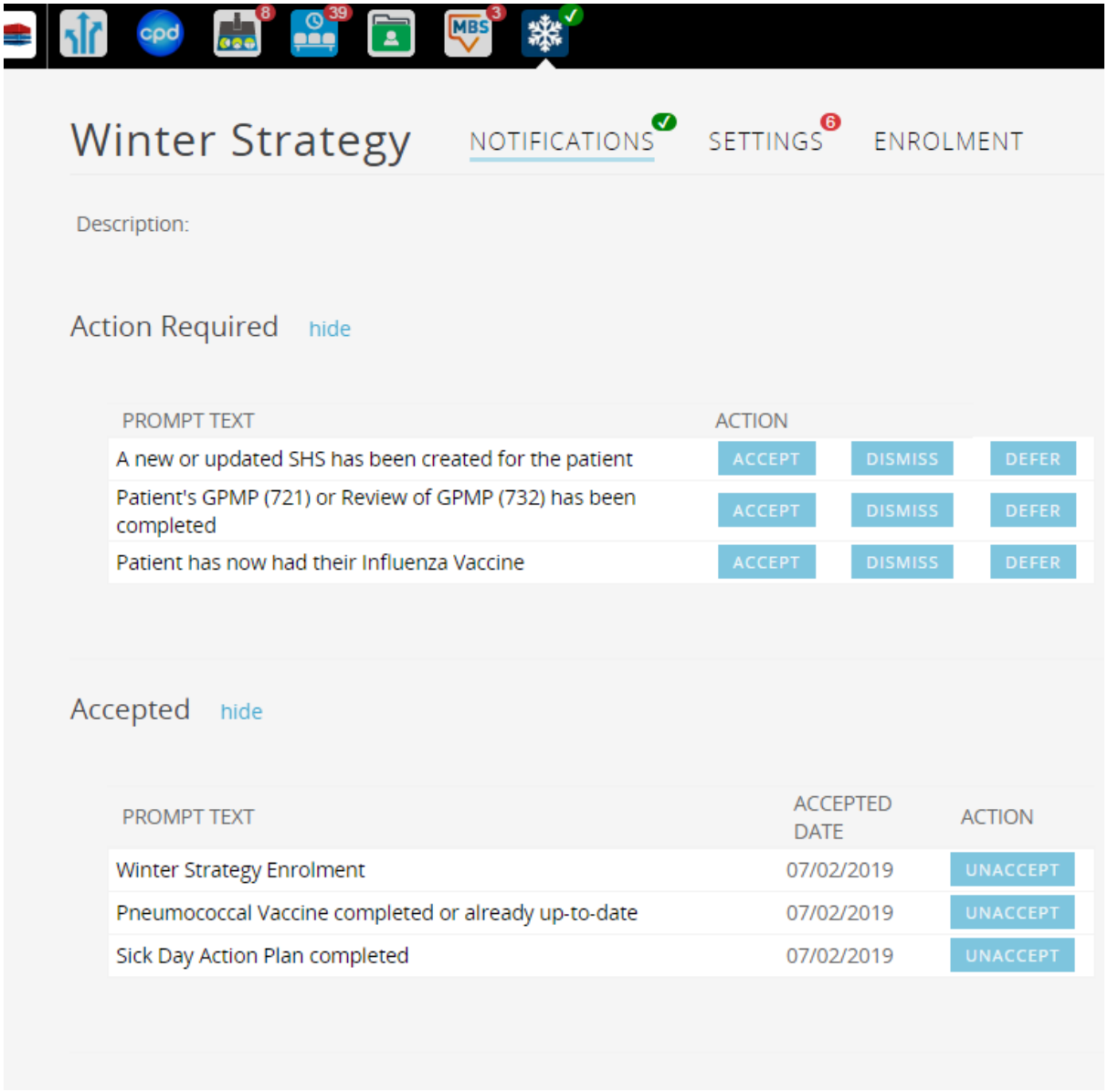


Press Accept to enrol the patient into the Winter Strategy



Once the patient is enrolled a tick will appear on the Winter strategy Logo and 'Winter Strategy Enrolment' will appear under 'Accepted'

Once data has been sent to the PHN you can start to invite patients in for appointments and mark off activities.



Once you have completed the action click 'Accept', the completed actions will appear underneath 'Accepted'.

Please note: This will not 'write' to your clinical software. Additionally by completing the task in your clinical software will not automatically mark the action as 'Accept'. It will need to be entered in both.