Using the Word Plug-in for sending PDF

Overview

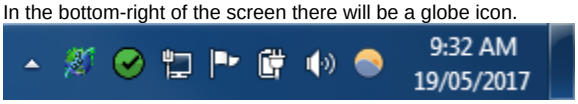
This guide provides an overview on how to use the Medical-Objects Word Plug-in to send PDF reports.

If you have any questions or require assistance, please contact the Medical-Objects helpdesk on (07) 5456 6000.

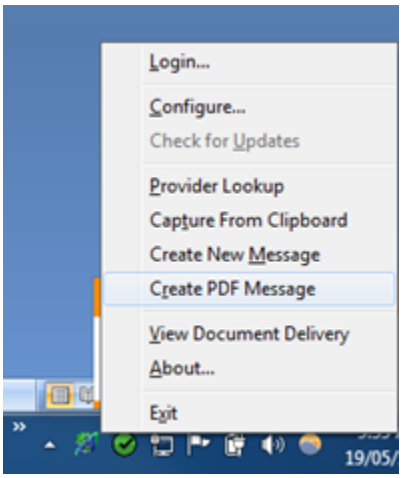
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Using PDF Sending for Word plug-in

1. In the bottom-right of the screen there will be a globe icon.

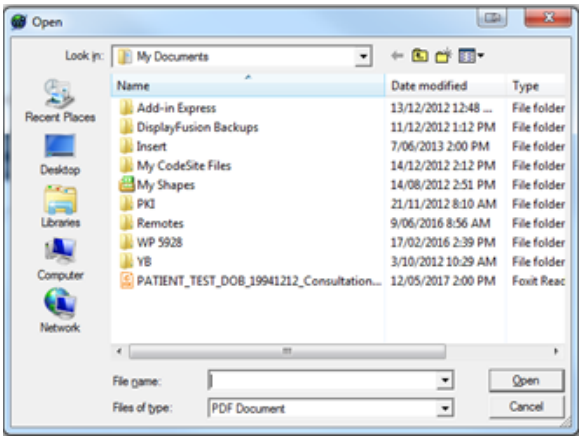


2. Right click the globe and select ‘Create PDF Message’.

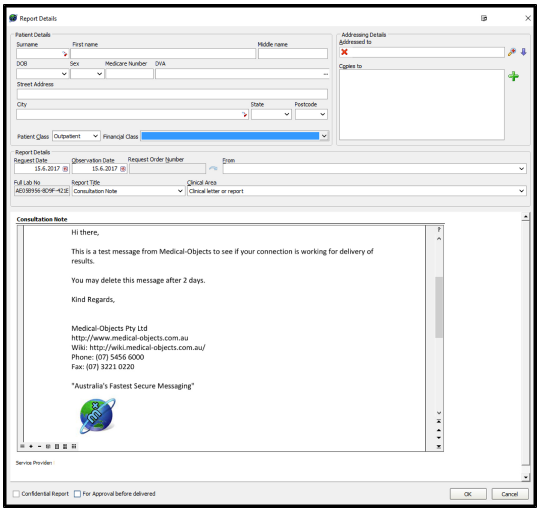


Note:
You may be asked to enter your passphrase at this stage. If you do not know your passphrase, Please contact Medical-Objects to arrange reinstallation (07) 5456 6000.

3. From here, navigate to where the PDF is stored and select it.

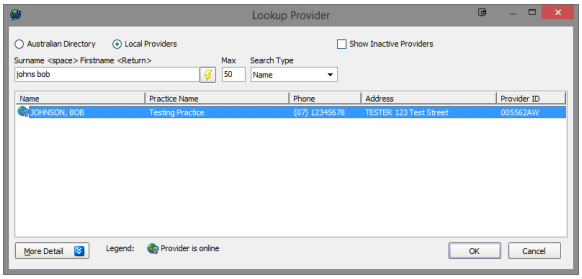


4. After selecting the file and selecting the 'Open' button, the following window will appear.

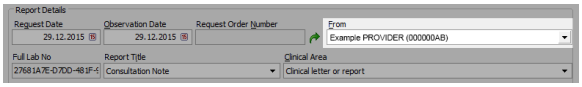


5. From here, simply fill in Patient Name and Date of Birth (minimum requirement for Patient Details).

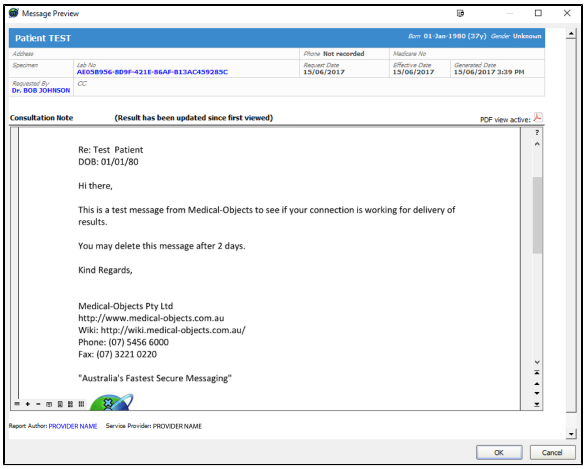
6. You can select the provider to address the letter to by clicking the Magnifying Glass icon in the Addressing Details section. Enter the provider number or the surname and or first initial and click **OK**.
   For more information on the Provider Lookup, see **this guide.**



7. Back on the Report Details screen, select the provider number you are sending from by clicking on the drop down box under 'From'.



8. When you are ready to send, click the **OK** button. You will then see a preview window like the one below.



9. If everything look ok, hit the **OK** button to send off the PDF.

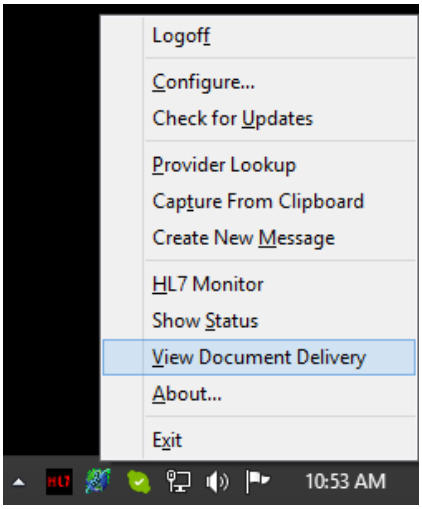
Note:

If at any time you need to check the progress of your outgoing results. The Web Activity Report will show you what results have been sent or received.

Web Activity Report

Once the Word Plugin is installed, You will have access to the Medical-Objects Web Activity Report. This report is only visible to the practice and Medical-Objects.

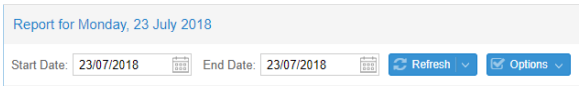
1. To access the **Web Activity Report,** Right-click on the icon in the taskbar and select **View Document Delivery** as shown below.



2. The first section of the report contains the name of your practice and the details of the machine it is installed on to. It also includes the directory the Download Client was installed in to, and the version it is currently running.



3. The next area allows you to set the dates back to see if any results have been sent or received during a time period. This date can be set back up to three months. Any results beyond that time frame have been archived by the application. If you need to access these, Please contact Medical-Objects.



Results Received

The following area of the web report looks at the results that have been received from other facilities.

As you can see below, the incoming reports are sorted under the names of the practice they were sent from, and by the date and time they were received. The first section of text indicates the acknowledgement by the software that the file has been received, the second section (with the green tick) indicates it has been imported by the practice management software.
The sending and receiving doctors are also listed, including their provider numbers.



Results Sent

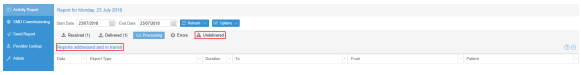
The following area of the web report looks at the results that have been sent from the practice through Medical-Objects. Messages sent from the Referral Client will be shown here.



Much like the **Received Reports** section, It will list the names of the practices you've sent to, times, dates, Doctors names and provider numbers. It also has the Acknowledgements ticked in green, which will appear when it has been processed by the receiver.

Messages that cannot be sent

When Medical-Objects is used for sending for example; Trinity referral client and Word Plug-in, Some messages may not be delivered due to the recipient's computer or software having complications and not being able to receive your correspondence. The diagram below shows the sections of the web report that provides details on the unsent messages.



Undelivered

As shown above, if you have messages that are located under **Undelivered** this means that the result/letter or referral cannot reach its destination due to either being in the process of registering a connection to the practice, or software or hardware issues at the receiving end. The software will continually try to send the result every 30 minutes, so there is no need to try and resend through Medical-Objects. However, it is advised to monitor the messages sitting in this section. If they remain there for a while you would be advised to fax a copy of the result /letters to the provider listed under that section to ensure delivery.

Reports That Are Addressed And In Transit

This section of the web report shows messages that are in the process of being sent. Results and letters have been sent to this provider before but are unable to at present due to hardware or software issue or the practice is offline. In this case if the results or letters are listed under the In Transit section for more than 24 hours please send a fax copy to the provider. If issues persist, Contact the Medical-Objects Helpdesk on (07) 5456 6000.

Error

Messages that appear here will do so because of an issue with sending. It may be that the provider number is no longer valid or in correct - or simply caused by a permissions issue when the software is trying to send the message out.

If you require any assistance determining why these messages are causing issues, Please contact the Medical-Objects Helpdesk on (07) 5456 6000.