

Updating Shexie Address Book

Overview

This guide provides an overview on setting up a doctor within Shexie to have sending capabilities through Medical-Objects.

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

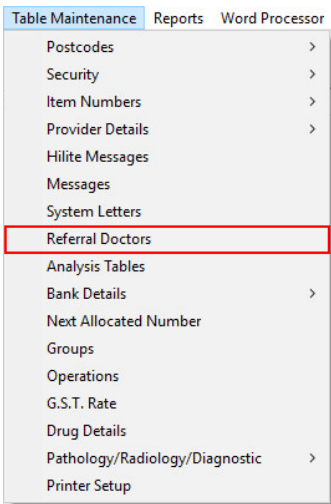
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Adding and Updating Doctors for Sending within Shexie

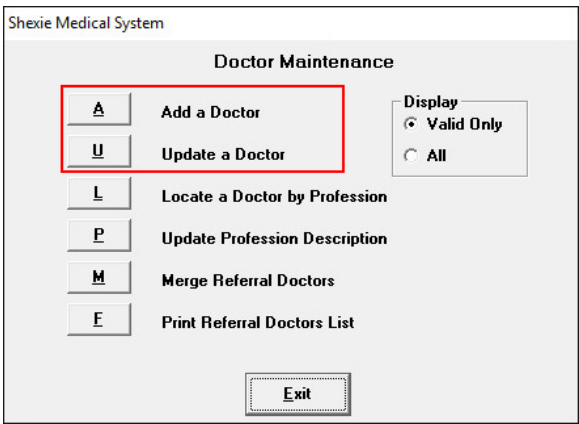
You will need to change some details from within Shexie's Address book to prepare for sending to providers. If this step is not completed, it may cause issues when sending your documents.

To look up providers to update your address book, You can use the Medical-Objects Referral client application. The guide for installing the Referral Client Application can be found [here](#), While the instructions for using the Referral Client to look up providers can be found [here](#).

1. Once you are logged into Shexie, Select **Table Maintenance** from the top Menu, and select **Referral Doctors** as shown below.



2. Select **Add a Doctor** to add a new doctor, or **Update Doctor** to update an existing doctors details.



Note:



If you select **Update Doctor**, You will need to search for the doctor within Shexies system. If the doctor does not exist, you can click **Add Doctor** again from here.

The screenshot shows the 'Shexie Medical System' window with a 'Doctor Maintenance' section. It contains three input fields: 'Last Name' with 'Johnson', 'First Name' with 'Bob', and 'Suburb' which is empty. Below these fields is a large text area displaying 'Johnson, Bob (Maroochydore)'. At the bottom of the window are two buttons: 'Add Doctor' and 'Exit'.

3. If you have chosen to Add a Doctor, You will need to enter their details on this screen. Existing Doctors will still have the information filled out, However there are several changes that will still need to be made before sending through Medical-Objects is possible.

The screenshot shows the 'Shexie Medical System' window with the 'Update Referring Doctor Details' section. It includes fields for 'Title' (Dr), 'First Name' (Bob), 'Last Name' (Johnson), and 'Valid' (checked). There are tabs for 'Postal Address' and 'Alternate Address'. The 'Postal Address' tab is active, showing '102 Wises Road' and 'Maroochydore 4558'. Other fields include 'Provider No.', 'Ref Period' (12), 'Phone' (54566000), 'Fax', 'Pager', 'Mobile', 'Professional Field' (General Practice), 'E-Mail Address', 'Salutation', 'Comments', 'EDI', 'e-Mail', 'Letters Send Method' (Medical Objects), 'Electronic Send Format' (HL7, RTF, PDF), and 'Print' options (Envelope, Address Label, Patient List). Buttons for 'OK' and 'Cancel' are at the bottom.

4. You will need to find the doctors provider number (if you dont have one already listed by updating the contact) through the Medical-Objects referral client. The guide for installing the Referral Client Application can be found [here](#), While the instructions for using the Referral Client to look up providers can be found [here](#).
5. You will then need to change the **Letters Send Method**. Select the drop down box, and choose the Medical Objects option.

The screenshot shows a dropdown menu titled 'Letters Send Method'. The 'Medical Objects' option is selected and highlighted in blue. Other options listed include Argus, Central Reporting, Do not Dispatch, E-Mail, Healthlink, Mail, and Promedius.

Note:



- Please note that there is a bug within Shexie software, where the name Medical Objects is spelled incorrectly. It may appear as **Medial Objects**. The process will still work, regardless of how the name is spelled.
- Also note in one case we have been informed the Medical Objects entry was missing. If this is the case you will need to contact Shexie support to have it added.

6. Change the **Electronic Send Format** to **HL7**.

The dialog box titled "Electronic Send Format" contains two radio buttons. The first radio button is selected and is labeled "HL7". The second radio button is labeled "PIT".

7. Change the **HL7 Format** to **PDF**. RTF format will work as well, However Medical-Objects recommends PDF to ensure compatibility with the receiving sites Practice software.

The dialog box titled "HL7 Format" contains two radio buttons. The first radio button is labeled "RTF". The second radio button is selected and is labeled "PDF".

8. The final section that is required to be filled out is the **EDI** section. Copy the provider number from the **Provider No** section and paste it into the **EDI** Field. If this field is left blank, the documents may not send.

The form is titled "Shexie Medical System" and "Update Referring Doctor Details". It contains the following fields and sections:

- Title:** Dr
- First Name:** Bob
- Last Name:** Johnson
- Valid:** ☒
- Postal Address:** 102 Wises Road
- Alternate Address:** Maroochydore 4558
- Professional Field:** General Practice
- E-Mail Address:**
- Salutation:**
- Comments:**
- EDI:** 000000AW
- Provider No:** 000000AW
- Ref Period:** 12
- Phone:** 54566000
- Fax:**
- Pager:**
- Mobile:**
- Letters Send Method:** Medical Objects
- Electronic Send Format:** ☒ HL7 ☐ PIT
- HL7 Format:** ☐ RTF ☒ PDF
- Print:** ☐ Envelope ☐ Address Label ☐ Patient List
- Buttons:** OK, Cancel, e-Mail

9. Click **OK** to save your changes.