

*HCN Technical Support Knowledge Base Article: MD2-17*

## **HCN Technical Support KBA:**

*How to Upload/Download Patient Records*

### **This article applies to Product(s):**

- *Medical Director 2.x*

### **Summary:**

This document describes the procedure for downloading Patient records to a workstation computer, and then how to upload them, back to the Server.

This procedure may be useful to you if you have a notebook/laptop computer workstation connected to your network, and you would like to travel with it to an external site, *and have access to Medical Director Patient records.*

### **Information:**

Typically, the download/upload process is as follows:

1. The laptop is connected to your network, and is acting as a 'workstation'.
2. Medical Director is run on the laptop.
3. Patients are selected and downloaded to the laptop.
4. Medical Director is shut down on the laptop, and the laptop is removed (disconnected) from the network.
5. The laptop is restarted (external to the network) and Medical Director is opened.
6. On opening Medical Director, Users are prompted to either:
  - 6.1. Reconnect to the network, automatically uploading the Patients that had been downloaded, or
  - 6.2. Stay disconnected from the network, using the local files (the Patients downloaded earlier).

If you choose to use the local files, Medical Director will open and you will have access to the Patients you downloaded earlier. You will *not* have access to any other 'normal' network services, such as printer-sharing, and you will *not* have access to other Patient records, because you are running the laptop *disconnected* from your normal network environment.

Conduct your external visits, recording Patient data into Medical Director as normal. When you return to the *home* network:

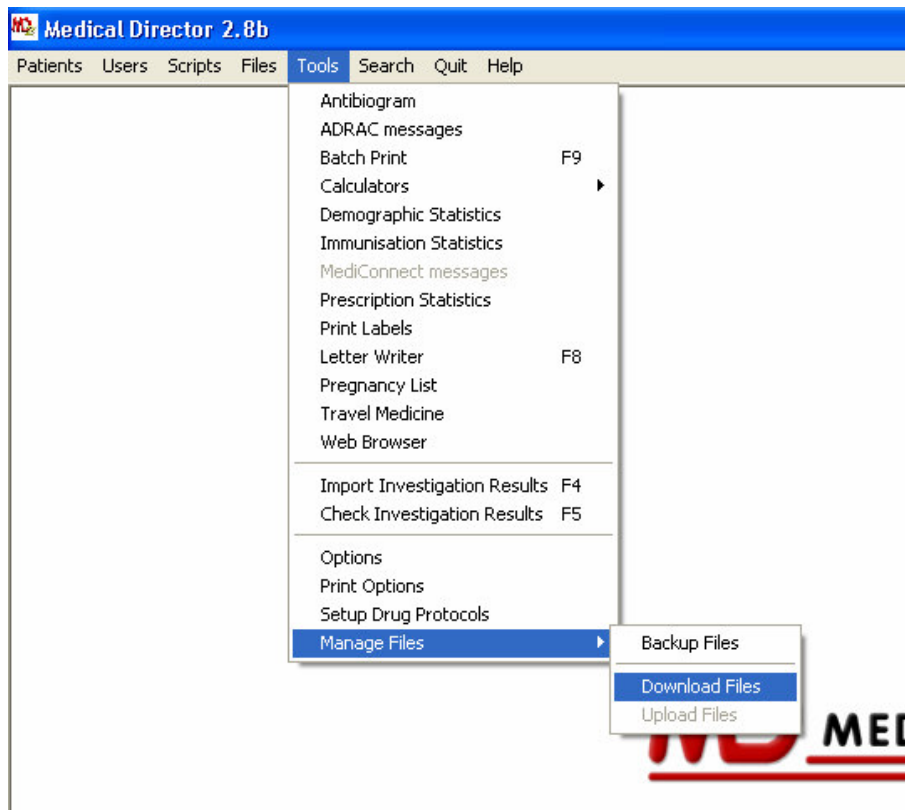
7. Reconnect the laptop to the network.

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8. Start the laptop and then start Medical Director.
9. On opening Medical Director, Users are prompted to either:
  - 9.1. Reconnect to the network, automatically uploading the Patients that had been downloaded, or
  - 9.2. Stay disconnected from the network, using the local files (the Patients downloaded earlier).
10. This time choose to reconnect to the network. Patient data will be uploaded back to the central Medical Director Patient Database on the Server computer, merging changes made to Patient data on the laptop with the original records on the Server.

### STEP-BY-STEP: Downloading Patients

1. Whilst attached to the computer network, in Medical Director select *Tools > Manage Files > Download Files* from the main menu.



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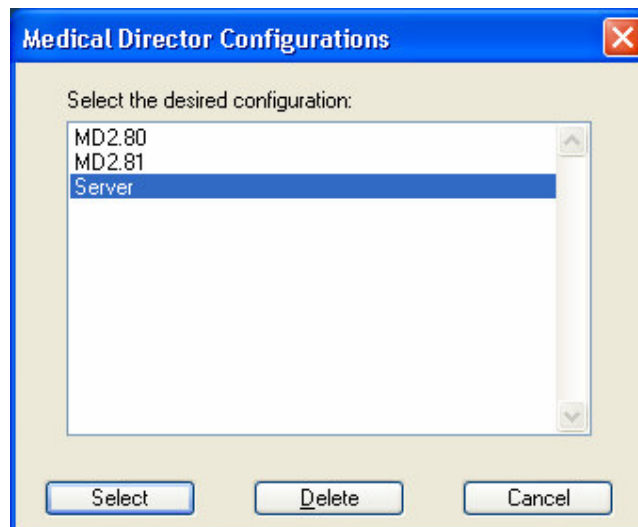
2. After clicking on Download Files, the patient database will be displayed. There are two basic options for downloading the patient files.
  - 2.1. **Download All**, downloads *all* the Patients in the Medical Director database to your laptop.
  - 2.2. **FILTER** or **Own Selection**. *Filter by demographic details* by clicking on the **Set Filter** Button.

Patients can be tagged by double-clicking on them in this list. An asterisk will appear next to their name if they are to be downloaded. Double clicking on the name again will remove the tag. The list of tagged patients is saved, so that you do not have to re-select them every time you wish to download them, e.g. If you see the same patients at a nursing home on a monthly basis. You can also clear the selected patients by clicking on the **Clear Selection** Button.

When all the Patients that you wish to download have been tagged, press the **Download** Button, to download the Patient records onto the local computer's hard disk. The laptop can now be disconnected from the network.

#### **NOTE: Multiple Configurations**

If you have multiple configurations, when Medical Director is restarted you will be asked which configuration to use. After selecting your configuration, the download will continue and Medical Director will close down. When re-started, Medical Director will automatically use the chosen configuration; you will not be shown the usual *select configuration* window.



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3. Once Patient records have been downloaded, you will be prompted to *use these files* or *reconnect to the network* each time you start Medical Director. While you are away from the surgery, or otherwise disconnected from the network, Medical Director will automatically use these downloaded files.



### **STEP-BY-STEP: Uploading Patients**

1. When you return to the main surgery, reconnect the computer back into the network and start Medical Director. You will be prompted to:
  - 1.1. Use these files, or
  - 1.2. Reconnect to the network.Select the option to reconnect to the network.
2. Patient data will be uploaded back to the central Medical Director Patient Database on the Server computer, merging changes made to Patient data on the laptop with the original records on the Server.