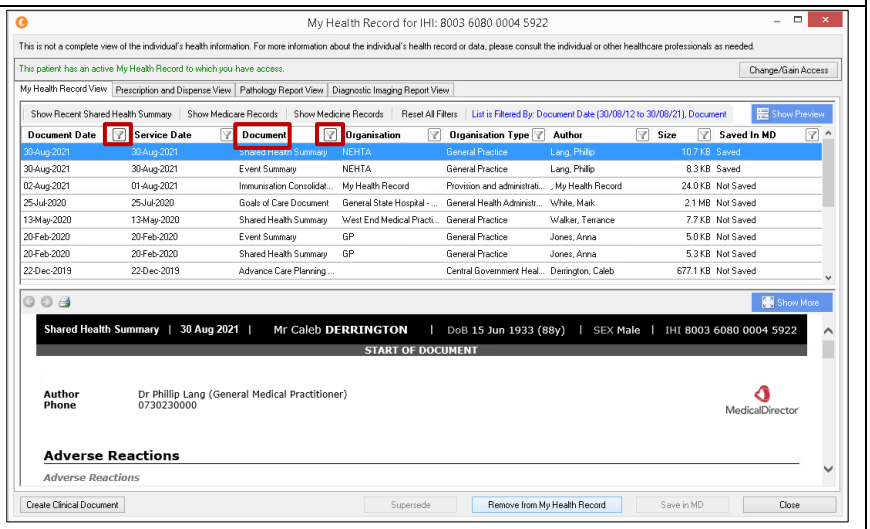
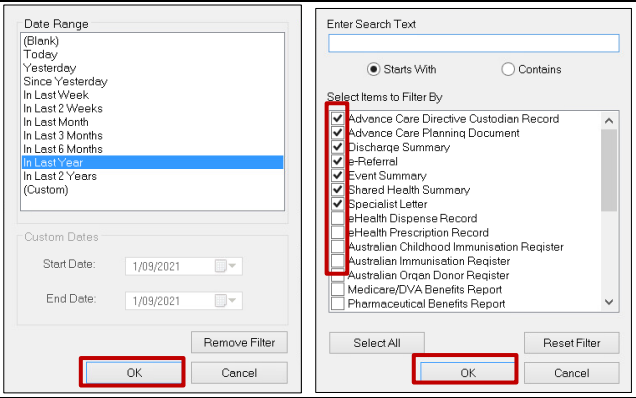
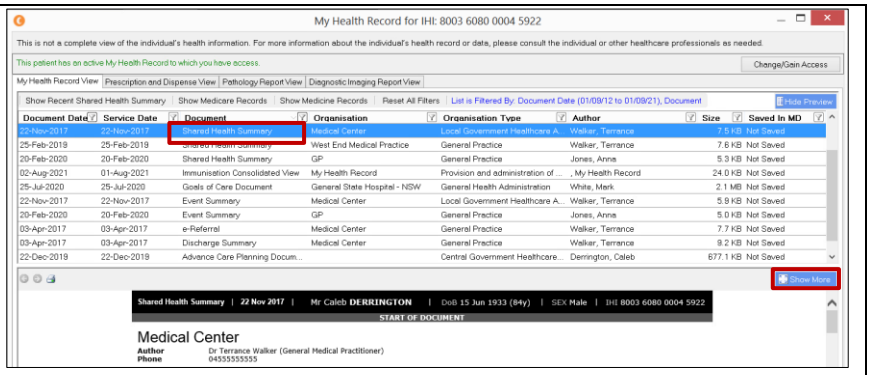
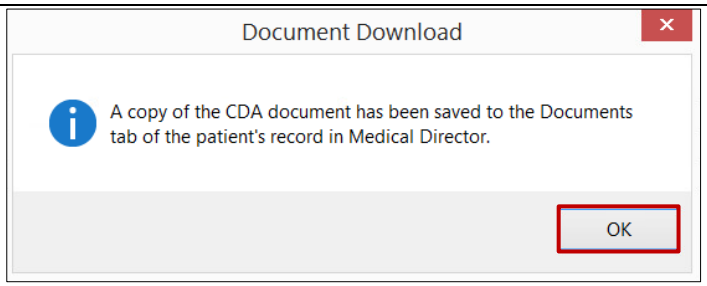
MedicalDirector
Fact Sheet

Viewing Clinical Documents in My Health Record

***Note**: These steps assume that your software is connected to the My Health Record system, the patient has a My Health Record and their individual healthcare identifier (IHI) has been validated in your system*

STEP 1: To access the patient's My Health Record, select **My Health Record** from the top menu.	
STEP 2: The Document List will appear, displaying documents in the patient's My Health Record (subject to any search filters which are set). When a document is highlighted, a preview will appear below the list. You may click on the column heading to **sort** documents in your preferred order. For example, clicking on the Document heading will sort documents in alphabetical order. You can also filter the document list by selecting the funnel icon. For example, you can filter **By Date** or by **Document Type**.	
STEP 3: Pop-up windows will appear allowing you to reset the relevant search parameters. Adjust document types to display by ticking/unticking the preferred checkboxes. Once completed, select **OK**. The document list will update to reflect the changes to the search parameters.	

STEP 4: To open and view a document, select the document from the list and double-click. Alternatively, click on Show More once the selected document appears in the preview area underneath the document list.	
STEP 5: To save the document to the patient's local medical record, select the document from the list and click **Save in MD.**	
STEP 6: A pop-up will appear confirming the document has been saved. Select **OK**.	
STEP 7: A copy of the document will be saved in the patient's local medical record in the **Documents** tab.	

Useful links

- How and when to view a My Health Record: https://www.myhealthrecord.gov.au/for-healthcare-professionals/howtos/view-my-health-record
- For upcoming training opportunities, visit Events and Webinars: https://www.digitalhealth.gov.au/newsroom/events-and-webinars

For assistance contact the My Health Record helpline on **1800 723 471 or email help@digitalhealth.gov.au**