

Updating your Practice (Location) Name in MedicalDirector

Purpose

Use this guide to update your practice (location) name in MedicalDirector and ensure all clinicians are linked correctly.

This is commonly required when a practice name changes or when aligning with eReferral registration.

Before you start

- You must have **administrative access** in MedicalDirector
- This guide **updates an existing location** — do **not** create a new one unless instructed
- Allow **5–10 minutes** to complete

Step 1: Open Practice Details

1. Open **MedicalDirector**
2. Select **Tools**
3. Select **Options**
4. Select **Practice**

Options

Network	Links	Prompts	Clinical	History	Examination
Drug/Patient Support	Devices	PKI	RSD	Recall	
General	Prescribing	Progress notes	Practice	Lists	Investigations

Practice name: Primary Health Tasmania PHN

Practice ID: 30132 Minor ID: HSS00000

Locations for ePIP Reporting only

No	Location Name
1	Primary Health Tasmania PHN
2	xx

Show Inactive Add Edit Deactivate

Details

Address: 15 Victoria Street Postcode: 7000

Step 2: Edit the Location Name

1. Under **Locations for ePIP Reporting Only** (also used for eReferrals and messaging), select the relevant **Location name**
2. Click **Edit**

The screenshot shows a software interface titled 'Options' with a close button (X) in the top right corner. It features a grid of tabs: Network, Links, Prompts, Clinical, History, Examination, Drug/Patient Support, Devices, PKI, RSD, Recall, General, Prescribing, Progress notes, Practice, Lists, and Investigations. The 'Practice' tab is selected. Below the tabs, there are input fields for 'Practice name' (Primary Health Tasmania PHN), 'Practice ID' (30132), and 'Minor ID' (HSS00000). A section titled 'Locations for ePIP Reporting only' contains a table with two columns: 'No' and 'Location Name'. The table has two rows: row 1 with '1' and 'Primary Health Tasmania PHN', and row 2 with '2' and 'xx'. Below the table are buttons for 'Add', 'Edit', and 'Deactivate', with the 'Edit' button highlighted by a red rectangle. There is also a checkbox for 'Show Inactive'. At the bottom, there are 'Details' for 'Address: 15 Victoria Street' and 'Postcode: 7000'.

Step 3: Update the Location field

1. In the **Location** field, enter the exact practice or organisation name that should appear in eReferral and formal directories.
 - o Example: *East Hobart Medical Centre*
2. Click **Save**

The screenshot shows a 'Location Details' form. The 'Location' field is highlighted with a red rectangle and contains the text 'Primary Health Tasmania PHN'. Other fields include 'Address' (15 Victoria Street), 'City/Suburb' (Hobart), 'Postcode' (7000), 'Phone' ((03) 6213 8249), and 'School ID' (0).

⚠ Important: Check clinician usual locations

If clinicians are not linked to the correct location, referrals and messages may fail.

Step 4: Review clinician locations

1. Go to **User** → **Setup Users...**
2. Check the **Location** column for each clinician

User	Location	Category
Dr Maxine Testing	Primary Health Tasmani...	Doctor
Dr Phil Testing	Primary Health Tasmani...	Doctor
Dr Test Testing	Primary Health Tasmani...	Doctor
Ms Carol Testing	Primary Health Tasmani...	Practice Manager
Ms Rebekah Testing	Primary Health Tasmani...	Receptionist
Nurse Nurse	Primary Health Tasmani...	Registered Nurse

Step 5: Correct if required

If a clinician’s usual location is incorrect:

1. Select the clinician
2. Double-click or click **Edit** (at bottom of page)
3. Set the correct location in the **Location** field
4. Click **OK**

Edit Doctor Details

User Details

Name: Dr Maxine Testing *

Location: Primary Health Tasmania PHN *

Address: 15 Victoria Street *

City/Suburb: Hobart *

Postcode: 7000 *

✓ You’re finished when:

- The updated practice/location name appears in **Practice Details**
- All clinicians show the correct **Location**
- The updated name appears when creating a referral

Appendix: Detailed Guide & Explanations

Why this matters

MedicalDirector uses **Location** as a key identifier for:

- eReferrals
- Messaging and provider linkage
- Clinician default settings

Updating the name without checking clinician locations is one of the most common causes of referral issues.

What should the Location name match?

- Use the **official organisation or practice name**
- Match the name used for:
 - eReferral directory registration
 - Formal correspondence
- Avoid abbreviations unless formally used

✓ *Good:* East Hobart Medical Centre

✗ *Avoid:* EHMC / Main Surgery

What NOT to change

Do not modify the following unless explicitly instructed:

- Site ID
- Minor ID
- Health Identifier

Changing these may disrupt integrations and historical data.

Common mistakes (and how to avoid them)

Mistake: Creating a new location instead of editing the existing one

→ *Fix:* Always edit the existing location unless directed otherwise

Mistake: Updating the location name but skipping clinician checks

→ *Fix:* Always complete the Users → Usual location review

Mistake: Using different naming across systems

→ *Fix:* Confirm the required naming standard before saving

If something doesn't look right

- Exit without saving if unsure
 - Confirm:
 - You edited the correct location
 - The name matches advised standards
 - Contact your local support team if guidance was provided with this request
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