



Recall and Reminder in Medical Director

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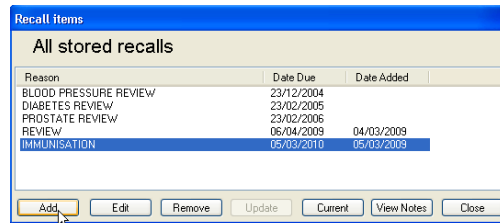


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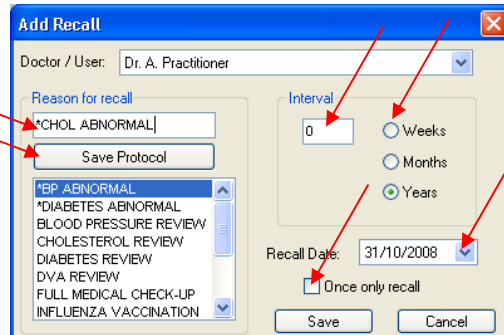
Adding Recalls and Reminders

1. Click **Clinical > Recalls** or the **F4 (CTRL+R in MD2)** key in the patient's file.
2. Select **Add** button.
3. Click the **Interval** and **Recall Date**, then click the **Save** button. If this is a continuous reminder i.e. pap smear, then do not select **Once only recall**.
4. When entering the **Reason for recall** if the item is a reminder simply select from the list or type and **Save Protocol** for future use.



Reason	Date Due	Date Added
BLOOD PRESSURE REVIEW	23/12/2004	
DIABETES REVIEW	23/02/2005	
PROSTATE REVIEW	23/02/2006	
REVIEW	06/04/2009	04/03/2009
IMMUNISATION	05/03/2010	05/03/2009

For recalls use a symbol i.e. # or * before typing the reason, this will take recalls to the top of list and help differentiate them from reminders when running database searches. Another way of doing this is starting all recall reasons with the letter 'A' e.g. ABNORMAL DIABETES or ABNORMAL PAP SMEAR, this will take them to the top of the list also.



Doctor / User: Dr. A. Practitioner

Reason for recall: *CHOL ABNORMAL

Interval: 0 Weeks

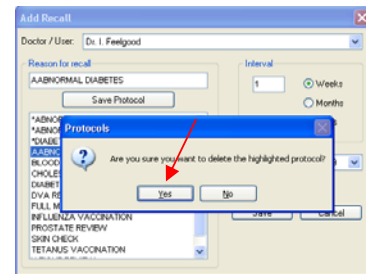
Recall Date: 31/10/2008

Once only recall

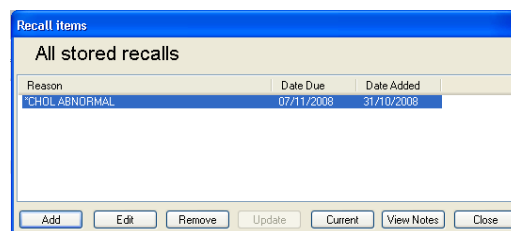


TIP!

To delete protocols from the list click and hold the left mouse button on the protocol and press the **Delete** key on your keyboard. Click **Yes** on the prompt to delete protocol.



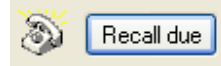
5. Your recall or reminder will now appear in the **Recalls items** screen. Options available to manage recalls are:
 - a. **Add** – add further recalls or reminders.
 - b. **Edit** – allows forward or back date (only up to current date) recalls or reminders. Can also be accessed by double-clicking on the item.
 - c. **Remove** – deletes from database.
 - d. **Update** – updates the recall or reminder based on the interval that was selected e.g. a 12 monthly health check due 1/1/2010 once updated will not appear in recall searches until a month before 1/1/2011. Not available if the **Once only recall** checkbox was selected.
 - e. **Current** – presents recalls and reminders due in next 30 days. This button then changes to **Show all** allowing you to revert back.
 - f. **View Notes** – opens the patient's progress notes that relate to the recall or reminder.



Reason	Date Due	Date Added
*CHOL ABNORMAL	07/11/2008	31/10/2008

6. Click **Close** to exit.

A ringing phone icon and a **Recall due** button appear to alert you that a recall or reminder is due within the next 30 days or is now overdue. Clicking the **Recall due** button will take you to the **Recall items** screen.



TIP!

Recall and reminders can be added in exactly the same way from within a number of screens e.g. checking pathology results, adding pap smear results, entering immunisation. It is a good idea to add the recall or reminder from the screen that you are working in as MD will pre-complete the **Add Recall** details (reason, interval etc) based on the task you were performing.

Adding to Patient Lists

MD will allow you to add recalls and reminders to multiple patients at the one time based on specific search criteria. This feature can be used by the practice to target a certain cohort of patients, an example would be to send out reminder letters for a particular preventative health check i.e. 45-49 year old health check program.

1. Click on **Search > Patient** from the main screen.
2. Enter search criteria, then click the **Search** button. In this example we are searching for all patients between the ages of 45 and 49.
3. Click the **Recall** button and follow directions (see pg. 3).

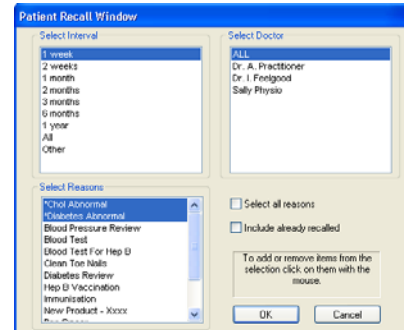
Surname	First name	Address	D.O.B.	Sex	Phone	Bus. Phone	Medicare No.
Heather	Heather	4 BELLEGLION ST, BARRHILL 3156	13/03/1933	F	02 234 1234	02 234 1234	0100000000
Andrew	Heather	2 Kennedy Rd, Demo Town 1234	12/05/1963	F	02 234 1234	02 234 1234	3500020121
Stuart	Stephen	8 MIDWAY ST, DEMO TOWN 1234	02/05/1957	M	02 234 1234	02 234 1234	0100000000
Andrew	Fred	3 Best St, St Kilda 3107	23/02/1923	M	0185 9634	0185 9634	2234724171
Frank	Fred	12 MyHome St, Footscroyde 3011	12/05/1955	M	4567 8900	3456 6778	
Frank	Sally	12 MyHome St, Footscroyde 3011	12/05/1957	F	4567 8900	3456 6778	
Andrew	Sally	21 BEST ST, FULL LAND 3122	12/05/1998	F	9892 3456		
Kingall	Willy	THE EUCALYPTUS TREE, SHERWOOD		M			3000000121
Duck	Donald	12 DOWNEY STREET, DOWNEYLAND		M			3500000121
Andrew	Anna	2 Kennedy Rd, Demo Town 4523	08/12/1988	F	9123 4567	9345 6789	3500000121
Andrew	John	2 Kennedy Rd, Demo Town 4523	17/06/1955	M	9123 4567	9345 6789	3500000121
Andrew	Fred	2 Kennedy Rd, Demo Town 4523	23/06/1958	F	9123 4567	9345 6789	3500000121
Andrew	Norman J.	3 Best St, St Kilda 3107	02/05/1955	F	0185 9634	0185 9634	2234724171
Andrew	Jennifer S.	2 KENNEDY RD, DEMO TOWN 4523	20/04/1970	F	9123 4567	02 234 1234	3500000121
Andrew	Julie	5 SUPERSON ST, PARKVILLE 3206	03/05/1956	F	234 5678	234 6789	0500025021
Donnelly	George	43 MAIN ST, ASLELADE 3754	02/07/1922	M	234 6789	234 6789	2234724441
Gilbert	Joe	25 ASLE ST, DEMO TOWN 1234	04/09/1955	M			
Anderson	David	61 WALLACE ST, MELBOURNE 3000	04/01/1955	M	8456 2345	9123 3456	4133400271
Anderson	Penny	61 WALLACE ST, MELBOURNE 3000	04/07/1993	F	8456 2345	9123 3456	4133400271
Carback	Judie	5 SUPERSON ST, PARKVILLE 3206	19/05/1988	F	456 7890		0500025021

Generating Lists

Recall

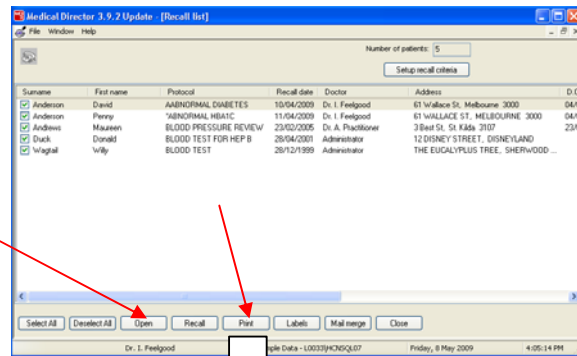
1. Click **Search > Recalls** from the main screen.
2. Select the desired **Interval**, **Doctor** and click the recall reasons from the **Select Reasons** list.

Remember that recalls require urgent attention and are normally done daily, so by selecting an **Interval** of 1 week you will cover any urgent recalls scheduled for the coming week.



3. Click the **Print** button to print the recall list that you will use to contact recall patients. A preferred alternative would be to contact recall patient using the details on the screen.

A note should always be added to the patient's file regarding the call, whether they were contactable or not. This is done by highlighting the patient in the list, then clicking the **Open** button. Once a note is entered in the **Progress** tab and the patient's file is closed you will be returned to the recall list.



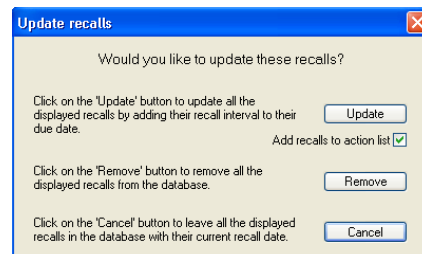
RECALL LIST

Name	Address	HomePhone	Chart	Reason	Doctor
Anderson, David	61 Wallace St, Melbourne 3000	9456 2345	345	Abnormal Diabetes	Dr. I. Feelgood
Anderson, Penny	61 Wallace St, Melbourne 3000	9456 2345	345677	*Abnormal Hba1c	Dr. I. Feelgood
Andrews, Maureen	3 Best St, Kilda 3107	8185 5634	345644	Blood Pressure Review	Dr. A. Practitioner
Duck, Donald	12 Disney Street, Disneyland			Blood Test For Hep B	Administrator
Wajjal, Willy	The Eucalyplus Tree, Sherwood Forest 4040			Blood Test	Administrator

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5. Once the recall list has printed or mail merge has completed, a final **Update Recalls** screen will appear giving you three options to choose from (will only appear if recalls printed are due in the next 30 days):

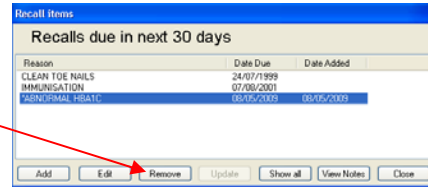
1. **Update** – used for reminders, this action will stop reminders appearing in future searches but leave them in the patients **Outstanding actions** list, provided the **Add recalls to action list** option is selected. For reminders i.e. not a **Once only recall**, then the next reminder due date will be updated according to interval selected when creating it i.e. 6 months, 2 years etc.



2. **Remove** – will update the recall or reminder as with the **Update** button (above) and remove any future occurrences of this recall regardless of whether it was recurring. This is not recommended for recurring

(preventative) reminders i.e. pap smears, as you will need to then re-create the reminder.

3. **Cancel** – used for recalls, this will leave the recall in future searches, until the patient attends the practice and **Remove** is clicked from the **Recall items** screen from within the patient's file.

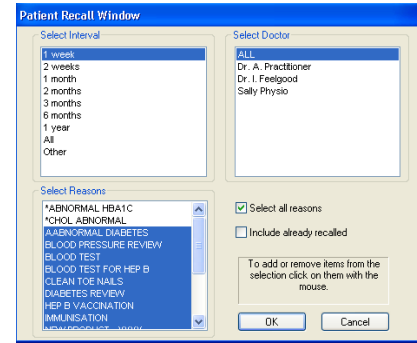


If you chose to contact patients' using the details displayed on the screen simply click the **Close** button on the **Recall list** (step 3).

Reminder

1. Click **Search > Recalls** from the main screen.
2. Select the desired **Interval**, **Doctor** and click the reminder reasons from the **Select Reasons** list.

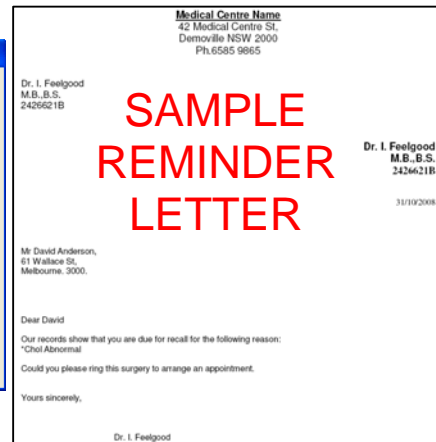
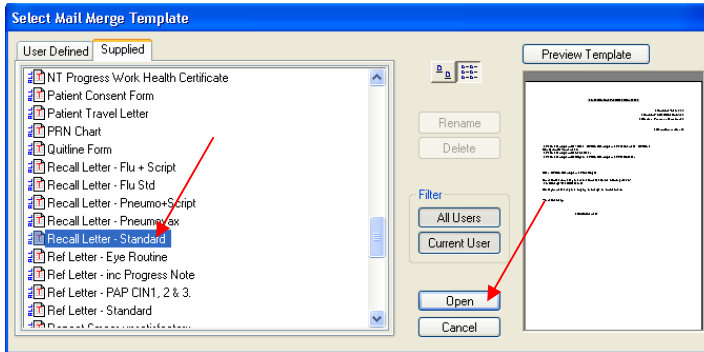
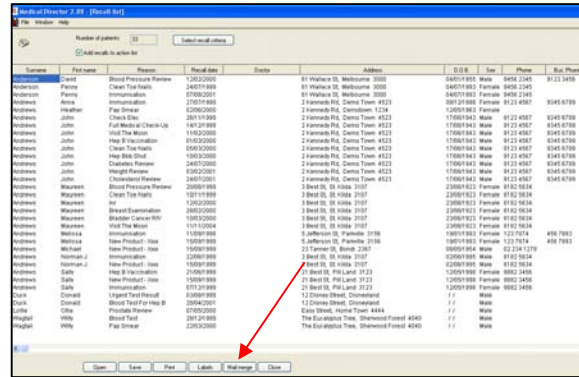
An easy way to select only the reminder reasons is to click the **Select all reasons** checkbox and then click on the recall reasons to remove them from the search.



3. Click the **Mail merge** button then your chosen letter template and click **Open** to print the letter(s). A copy of this letter will be saved under the **Letters** tab of the patient's file.

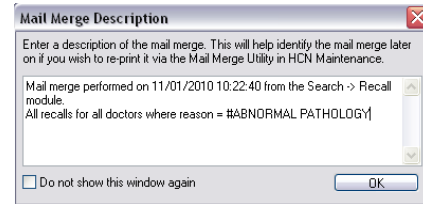
Labels option can also be used to generate address postage labels for printing.

DONALD DUCK,
12 DISNEY STREET,
DISNEYLAND.



4. Enter a **Mail Merge Description** for this print out just incase you need to reprint the letters at a later stage.

Reprinting these letters is done using **HCN Maintenance > Medical Director (under Database Tasks) > Mail Merge Utility.**



5. Make a selection from the **Update recalls** screen (see pg 5).



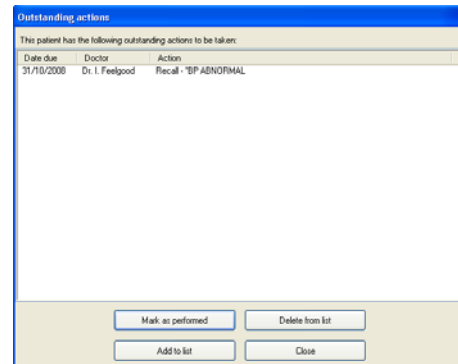
TIP!

If you decided there are certain patients whom you do not want to send reminder letters too, simply click the checkbox to the left of the patient's name to remove the tick. Only patients with a tick to the left of their name will be included.

The Action List

Once a list or mail merge is performed, the **Update** and **Remove** selections will send a 'reminder note' to an **Outstanding actions** list. This list will automatically appear when you next open the patient's file, prompting you to follow-up on the correspondence sent to the patient.

1. **Mark as performed** - will remove the Outstanding action from the **Outstanding actions** list. This can still be searched for as a **past action** if needed.
2. **Delete from list** - will completely delete any record of the action from the list.
3. **Add to list** - can add actions (clinical or not) directly to **Outstanding actions** list manually, e.g. ask about exercise etc. This creates an electronic memo, but should not replace the recall and reminder system.



4. **Close** - will close down the **Outstanding actions** window, but it will again prompt the doctor next time the patient's file is opened.

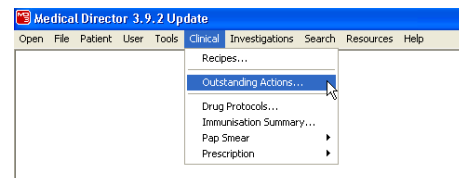
The **Outstanding actions** list can be accessed any time by clicking **Clinical > Action List** from within a patient's file.

Regardless of which of these functions is selected, you must manually enter the visit details in progress notes.

Searching Outstanding Actions

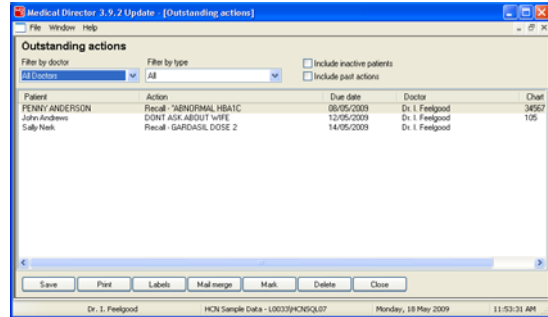
Outstanding actions and their status can be tracked to see how many patients are yet to have the **Outstanding action** performed.

1. Click **Clinical > Outstanding actions** from the main screen.

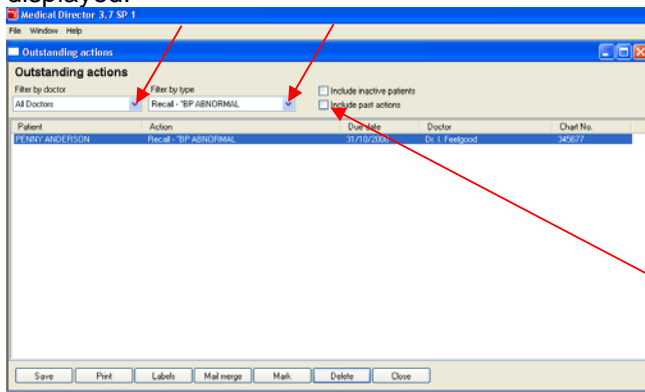


2. All **Outstanding actions** will then be displayed. The **Save/Print/Labels/Mail merge** buttons perform the same functions as when generating a **Recall List**.

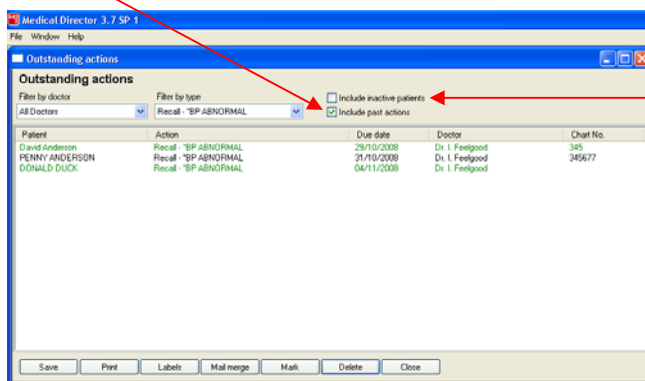
- a. The **Mark** button allows an action to be marked as performed, similar to selecting the **Mark as performed** button in the patient's **Outstanding actions** list.
- b. The **Delete** button will completely delete any record of the action from the list.



You can filter **Outstanding actions** by doctor, using **Filter by doctor** or by type, using the **Filter by type** and selecting from the lists. In this example **All Doctors** who have patients with current actions of the type **'Recall - *BP ABNORMAL'** will be displayed.



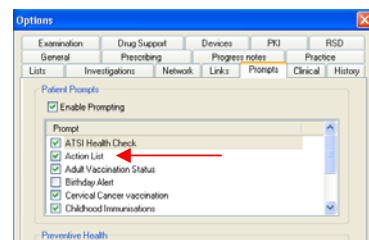
To check how many patients had their **Outstanding actions** performed tick **Include past actions**. Patients who have had the action performed previously will come up in **green**.



There is also an option to **Include inactive patients**, which can be used when cleaning your database.



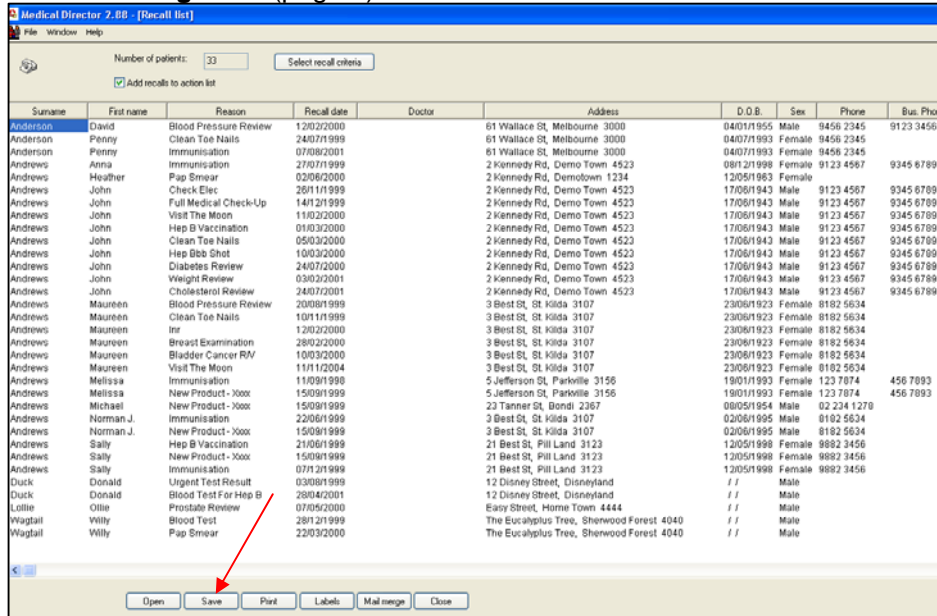
TIP! If you find that the **Outstanding actions** list is not appearing when entering a patient's file click **Tools > Options** from either the main screen or patient's file and check that **Action List** is ticked under the **Prompts** tab.



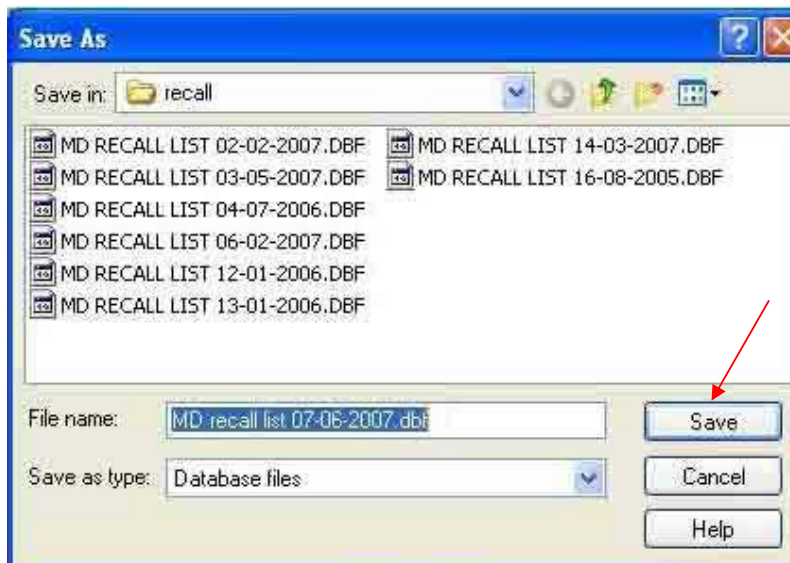
Saving Recall and Reminder Lists (MD2 ONLY)

Saving lists is useful if you wish to generate the list in future or to create an audit trail.

1. On the main screen select **Search > Recalls** and select search criteria as per **Generating Lists** (page 5).



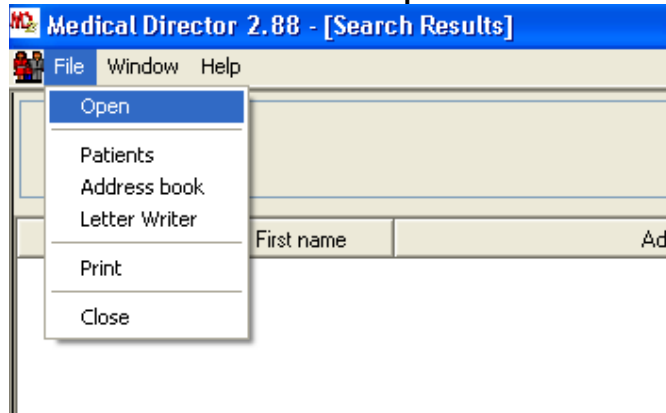
2. Clicking on **Save** button will save the recall list in the **Recall** folder under **C:/MDW2**, you can select an alternative location. The file is by default called **MD RECALL LIST** followed by the date the list was generated, in this case **MD RECALL LIST 07-06-2007**.



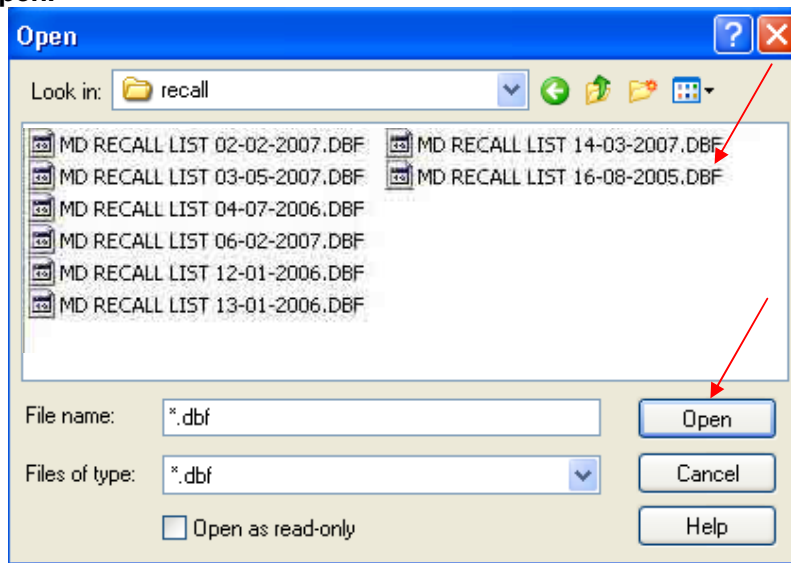
3. The **Update recalls** screen will now appear to finish process as outlined in **Generating Lists** (page 5).

Opening a Saved List (MD2 ONLY)

1. On main screen select **Search > Database**.
2. Then from search screen select **File > Open**.



3. Navigate to where you saved the recall file then highlight the file and select **Open**.



You can now regenerate recalls as outlined in **Generating Lists** (page 5).