



# **Recall and Reminder in Best Practice**

Daniel Hanna  
IM/IT Program Co-ordinator  
Ph. 02 8833 8033  
[daniel.hanna@wentwest.com](mailto:daniel.hanna@wentwest.com)



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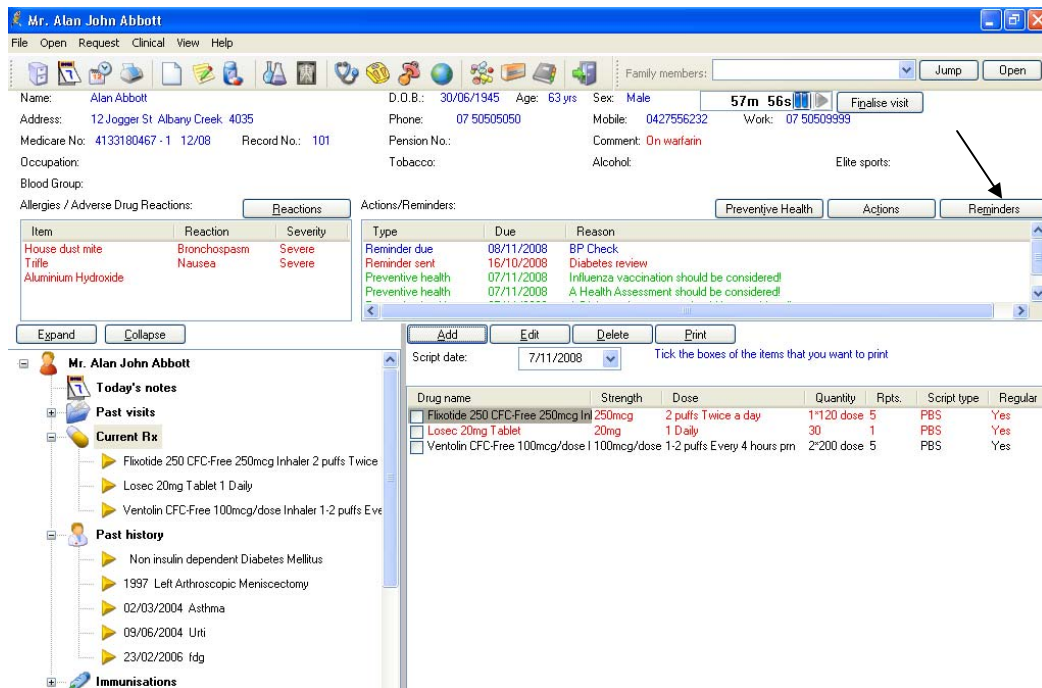
## Overview

There are several interacting systems in Best Practice to help manage patients:

- **Reminders** – this is where both RECALLS and REMINDERS are entered.
- **Actions** – This is similar to a ‘To-Do List’ that will alert you of actions or follow-ups relating to the patient (clinical or non-clinical) that you should address at the next consultation. These are non-urgent items that do not need attention prior to the next consultation, unlike a Recall or Reminder.
- **Preventative Health** – These are items that will alert the doctor that a particular preventative health item needs checking during the patient’s consultation. If this item is deemed as being of particular importance and reminder correspondence is necessary, it will need to be entered into the **Reminders** section.

This handout focuses on the **Reminders** feature, which is useful to alert *doctors and patients* when various treatments are due or of abnormal test results that need urgent attention. It is important to note that although the feature is marked as **Reminders** in Best Practice, it can be used for both Recalls and Reminders.

The  button is located on the right hand side of the patient screen. A reminder can be scheduled at any point throughout a consultation to ensure that the patient is notified, for example, of the next Diabetes review.



**Mr. Alan John Abbott**

Name: Alan Abbott D.O.B.: 30/06/1945 Age: 63 yrs Sex: Male 57m 56s Finalise visit

Address: 12 Jogger St Albany Creek 4035 Phone: 07 50505050 Mobile: 042756232 Work: 07 50509999

Medicare No: 4133180467 - 1 12/08 Record No.: 101 Pension No.: Comment: On warfarin

Occupation: Tobacco: Alcohol: Elite sports:

Allergies / Adverse Drug Reactions: Reactions

Item	Reaction	Severity
House dust mite	Bronchospasm	Severe
Tarife	Nausea	Severe
Aluminium Hydroxide		

Actions/Reminders: Preventive Health Actions **Reminders**

Type	Due	Reason
Reminder due	08/11/2008	BP Check
Reminder sent	16/10/2008	Diabetes review
Preventive health	07/11/2008	Influenza vaccination should be considered!
Preventive health	07/11/2008	A Health Assessment should be considered!

Expand Collapse

Mr. Alan John Abbott

Today's notes

Past visits

Current Rx

- Fixotide 250 CFC-Free 250mcg Inhaler 2 puffs T twice
- Losec 20mg Tablet 1 Daily
- Ventolin CFC-Free 100mcg/dose Inhaler 1-2 puffs Eve

Past history

- Non insulin dependent Diabetes Mellitus
- 1997 Left Arthroscopic Meniscectomy
- 02/03/2004 Asthma
- 09/06/2004 Uti
- 23/02/2006 Idg

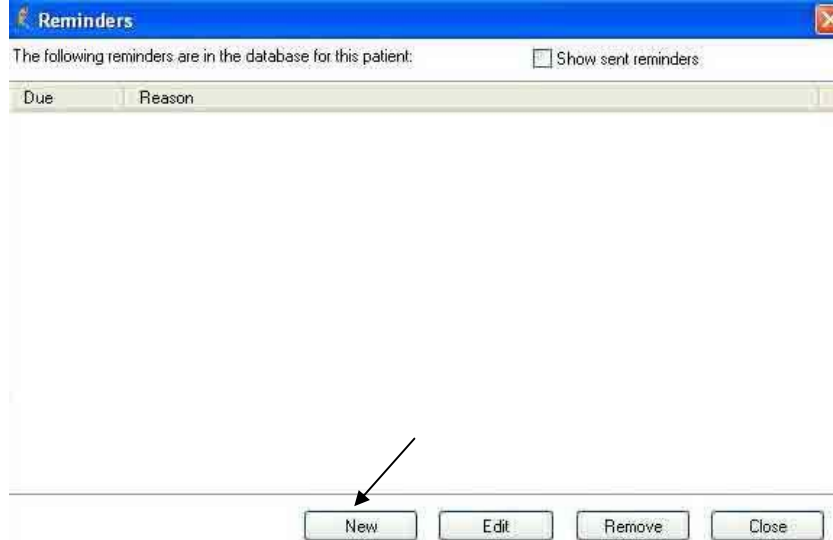
Immunisations

Script date: 7/11/2008 Tick the boxes of the items that you want to print

Drug name	Strength	Dose	Quantity	Rpts.	Script type	Regular
<input type="checkbox"/> Fixotide 250 CFC-Free 250mcg In	250mcg	2 puffs T twice a day	1*120 dose	5	PBS	Yes
<input type="checkbox"/> Losec 20mg Tablet	20mg	1 Daily	30	1	PBS	Yes
<input type="checkbox"/> Ventolin CFC-Free 100mcg/dose I	100mcg/dose	1-2 puffs: Every 4 hours pm	2*200 dose	5	PBS	Yes

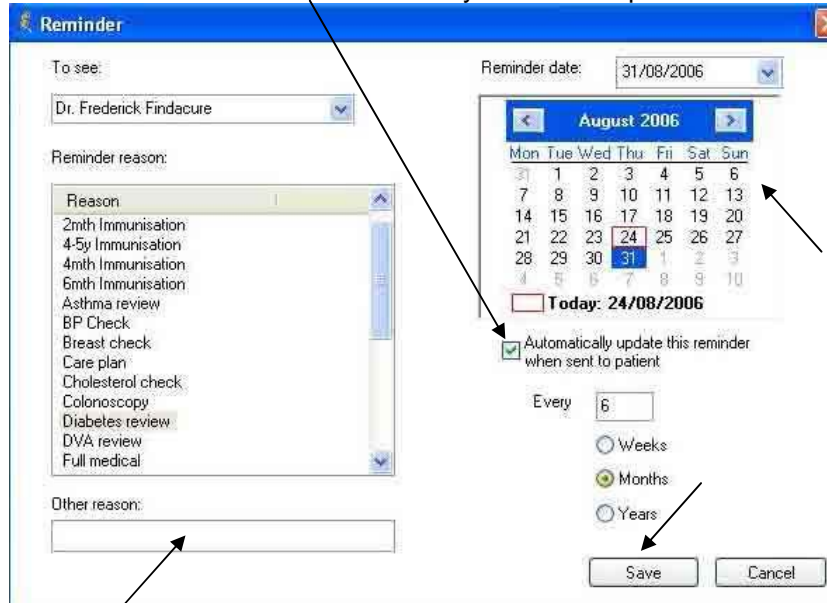
## Adding a Recall/Reminder

1. Within a patient's record click on the **Reminders** button to bring up the **Reminders** window. Select the **New** button screen to set up a reminder for Diabetes review.



2. Select the doctor's name from **To see** list. Scroll down the **Reminder reason** list and highlight the reminder required. Free-type in any additional notes in the **Other reasons** field. Use the calendar to find the **Reminders date**.

Reminders can be sent at regular set intervals by selecting the **Automatic update** checkbox and selecting the reminder interval e.g. every 6 Months. For **Recalls** this will need to remain unchecked as they relate to a specific result.

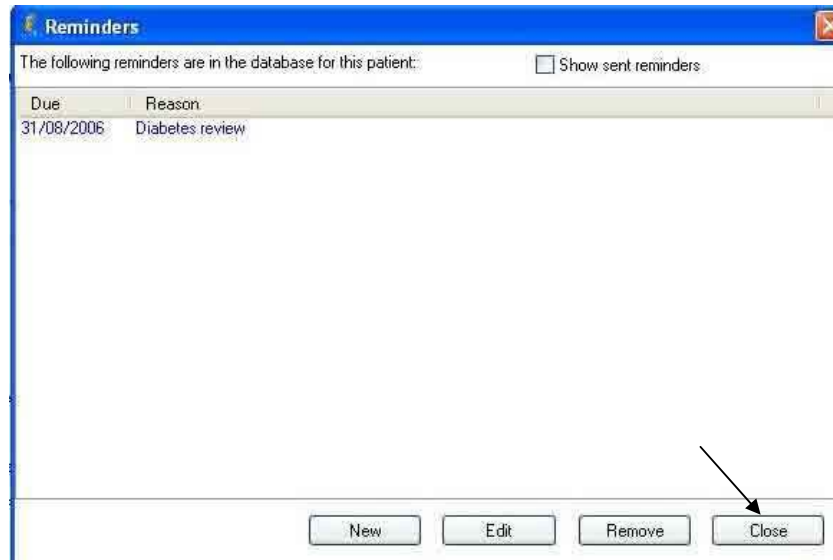


For **Recalls** it is a good idea to differentiate them by using CAPS or marking them with a character (\* or #) and typing them into the **Other reasons** box e.g. **\*BP ABNORMAL**. The next chapter will cover saving these recall reasons into the database as so they appear in the **Reminder reasons** list.

**Note:** If you are logged on as a doctor the new reminder screen will display your name automatically. If you are logged on as practice staff you might select the appropriate doctor on the system. This name will appear on the reminder letter.

3. Once finished, select the  button to record the reminder – it should appear in the list of reminders for that patient.

4. Click on **Close** to finish setting up the Reminder. In future if you wish to make any changes to the Reminder, you can highlight the particular Reminder and click **Edit** to make changes. If you wish to delete the Reminder, highlight and click **Remove**.



The **Reminder** type, date due and reason will appear on the right side of the patients file under the **Actions/Reminders** heading.

Actions/Reminders:

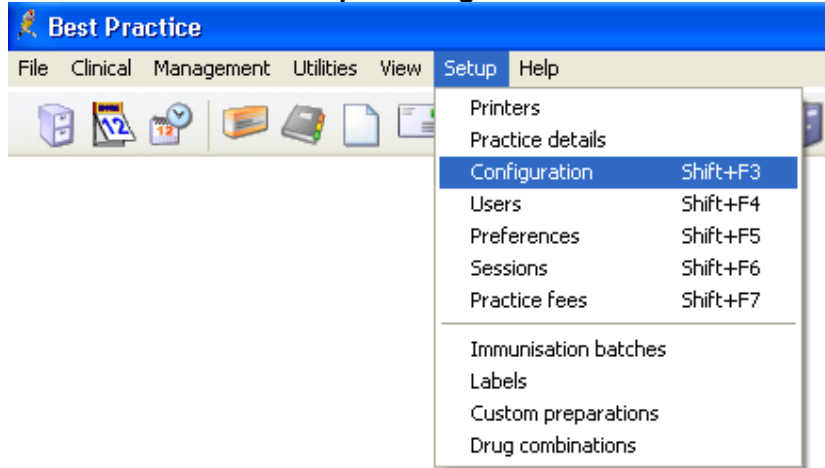
Type	Due	Reason
Action	03/10/2008	Skin check
Reminder due	08/11/2008	BP Check
Reminder sent	16/10/2008	Diabetes review
Preventive health	07/11/2008	Influenza vaccination should be considered!

The reminder will only appear in the patients file within 30 days of due date. Reminders/Recalls which **blue** are due within 30 days and overdue reminders/recalls will appear in **red**. **Preventative Health** reminders are in **green**.

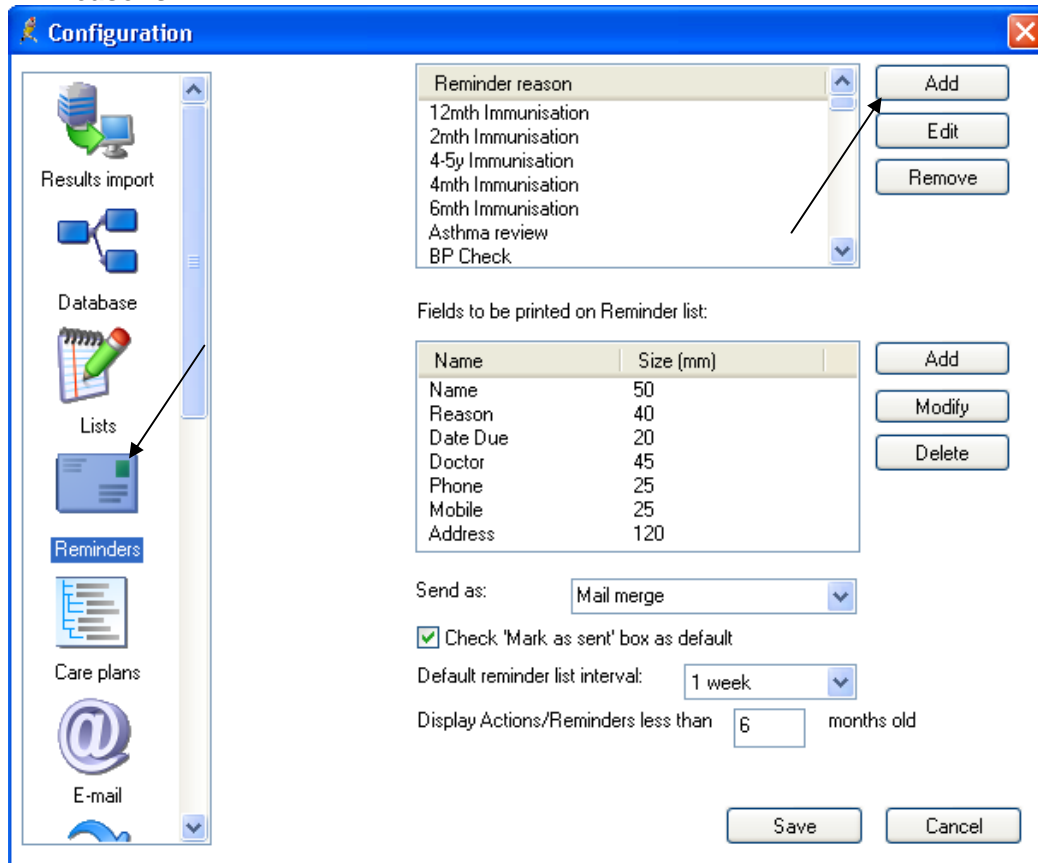
## Adding Recall Reasons

By adding as many recall reasons into the database you will save time in typing other reasons each time and will make searching for recalls (separately from reminders) easier.

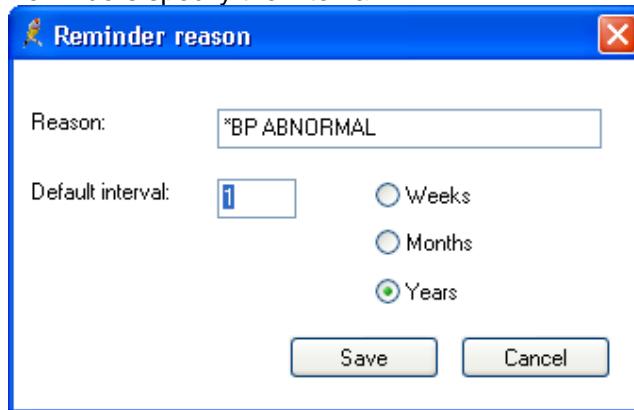
1. From the main screen select **Setup > Configuration**.



2. Select the **Reminders** icon on the left then click the **Add** button to add **Reminder Reasons**.



3. Type the **Reason** and delete any numbers appearing in the **Default Interval** box, otherwise for reminders specify the interval.



Reminder reason

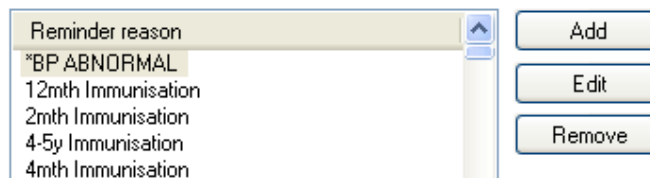
Reason: \*BP ABNORMAL

Default interval: 1

Weeks  
 Months  
 Years

Save Cancel

4. The recall reason will now appear in the **Reminder reason** list. This can be repeated to add as many reasons as necessary, either recall or reminder. Remember to differentiate between them with either a symbol (\* or #) or by using CAPS so that searches are easier.



Reminder reason

- \*BP ABNORMAL
- 12mth Immunisation
- 2mth Immunisation
- 4-5y Immunisation
- 4mth Immunisation

Add Edit Remove

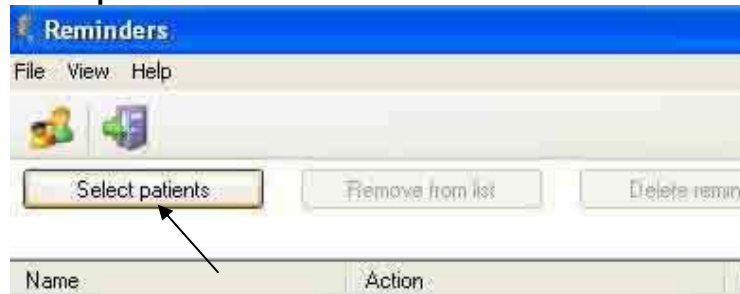
Now when entering a recall or reminder in any patients record the new reason(s) will appear.

## Generating a Recall/Reminder List

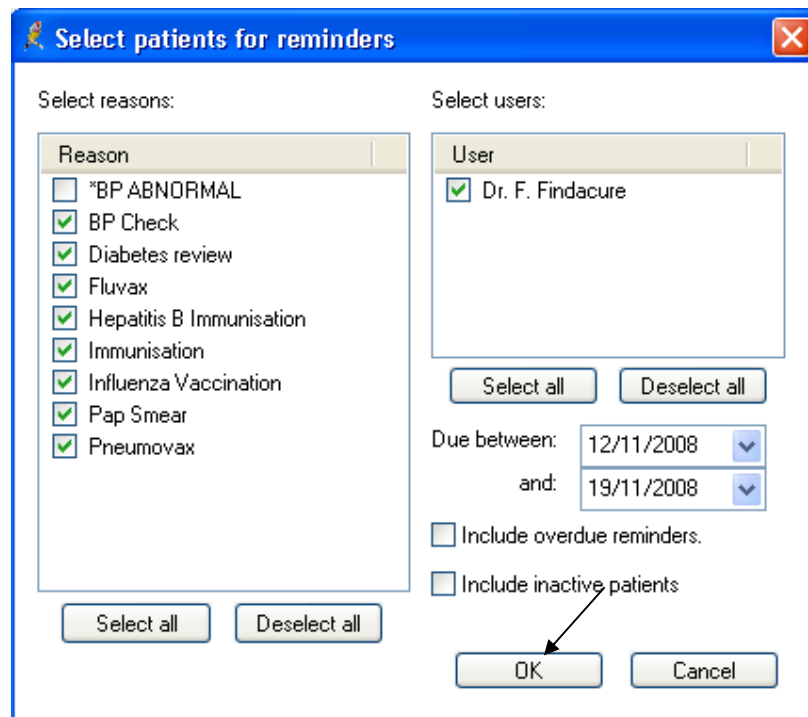
1. Go to the main screen and click **Clinical > Reminders**.



2. Click on **Select patients** button.



3. The **Select Patients for reminders** window allows you to select the reason, the user and the interval of the reminder. Make sure to only select either reminder or recall reasons depending on the task being performed.



4. Select the interval using the date settings. You can decide to include overdue reminders or reminders on inactive patients by ticking the appropriate box. Once finished click **OK** to generate the list.

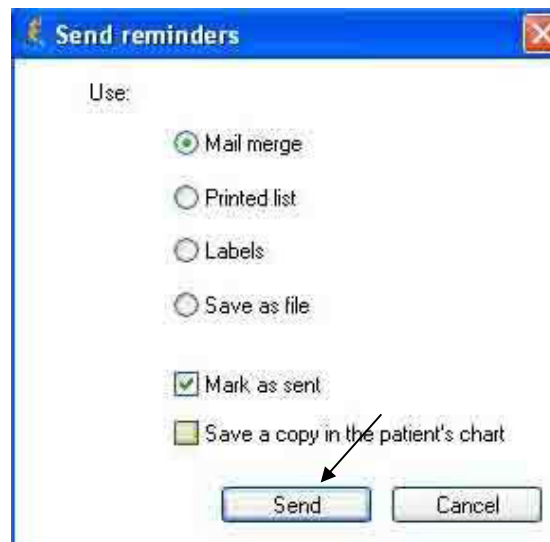


5. The Reminders list shows the patients due. Click on **Send reminders** button if you wish to contact the patients about their reminders.

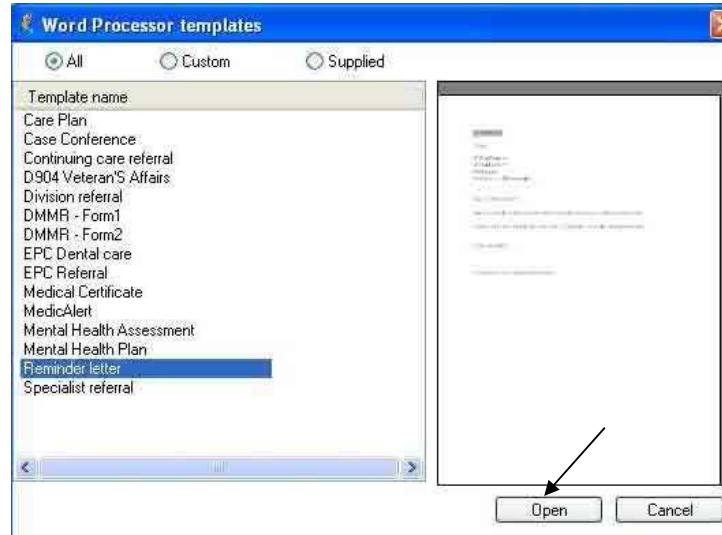


6. Chose one of following options:
- Mail merge
  - Printed list
  - Labels
  - Save as file

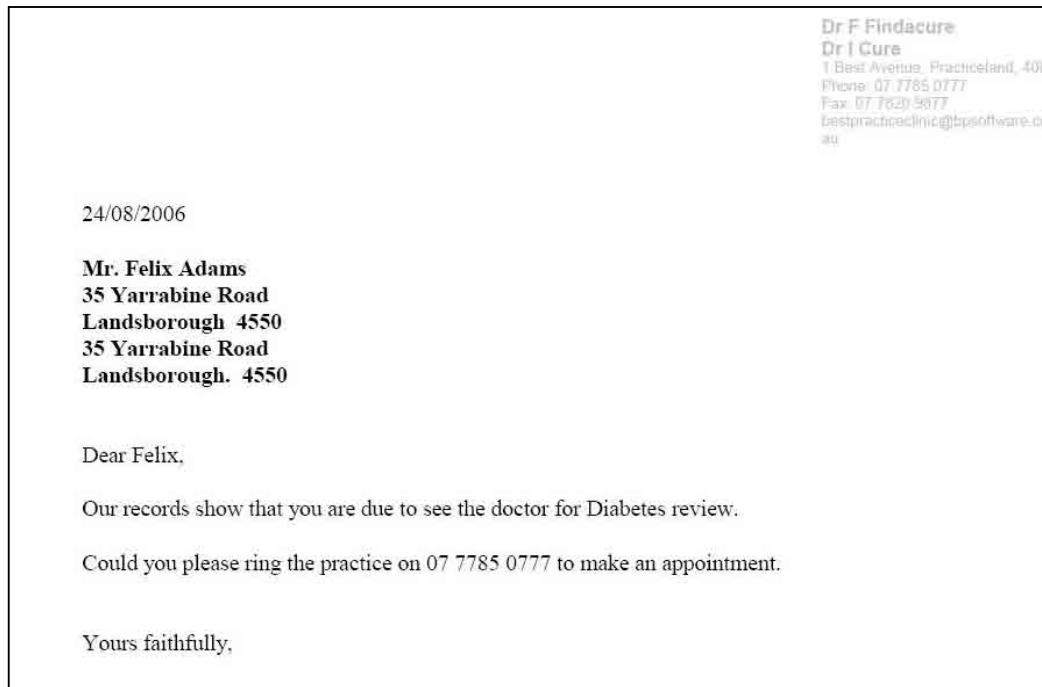
Select the appropriate option and click **Send**.



7. **Mail merge** option will open the word processor and you can select the reminder letter template (or any other appropriate template). By clicking on **Open** you send the reminder letters to the printer for all patients on the reminder list.



The reminder letter will be customized to each patient and the reminder reason will also be specific according to the reminder reason that was placed on the patient. If the **Mark as sent** box was ticked the **Reminder sent message** will be recorded in the patient's record. If **Save a copy in the patient's chart** was ticked, a copy of this letter will be saved in **Correspondence Out** within the patients record.



In this case **Mark as sent** was ticked and a **Reminder sent** notification was recorded in the patient's record.

Actions/Reminders:

Preventive Health

Type	Due	Reason
Reminder sent	24/08/2006	Diabetes review

8. **Printed list** option prints a list of patients due for reminder including their name, reason for reminder, date due, doctor, phone, mobile and address. This is commonly used for daily recalls when contacting patients with abnormal results.

**Reminder list**

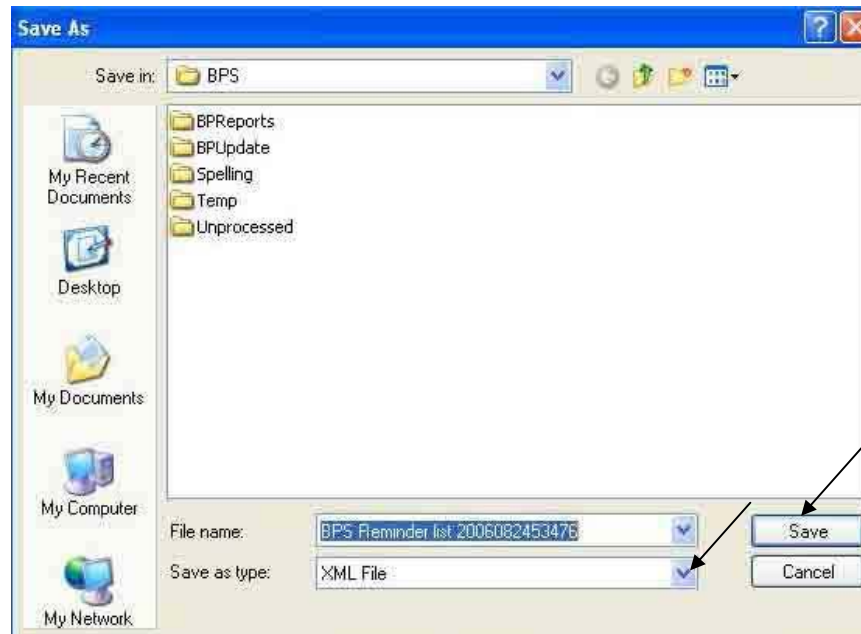
Name	Reason	Date Due	Doctor	Phone	Mobile	Address
Bartholomew, Ray	Influenza Vaccination	04/03/2006	Dr. F. Findaoure	07 82576666		354 Main
Alfreds, David	Diabetes review	07/03/2006	Dr. F. Findaoure	07 48759664		481 Spen

9. The **Labels** option allows patient contact details to be printed onto sheets of adhesive labels. These labels are set up using **Setup > Labels** from the main menu.

Allen, Ken  
8 Grey St  
Fremantle. 6160

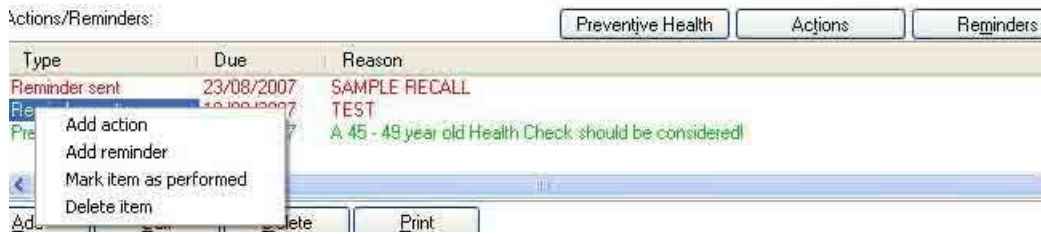
Bryant, Leonard  
32 Lonely Lane  
Bankstown. 2200

10. **Save as file** option saves the reminder list as a file onto your system. Saving reminder lists is useful if you wish to generate the list in future or to create an audit trail.

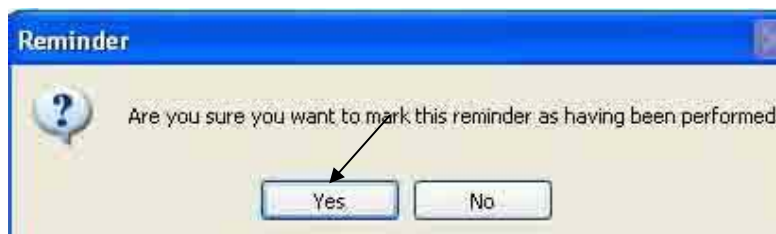


The file is named **BPS Reminder List** and reversal of the day it was created, e.g. 20060824 by default. You can rename this file by highlighting the default filename and deleting it. It is saved in XML format, but can be saved as a text file also by clicking the drop-down arrow.

11. Once the patient arrives for their consultation, from within their record, right-click **Reminder sent** on the appropriate recall/reminder and choose the **Mark item as performed** option. Alternatively, double-click on the Reminder **Type** directly.



12. Following prompt will appear. Click on **Yes**. Reminder will be removed from the patient's file.

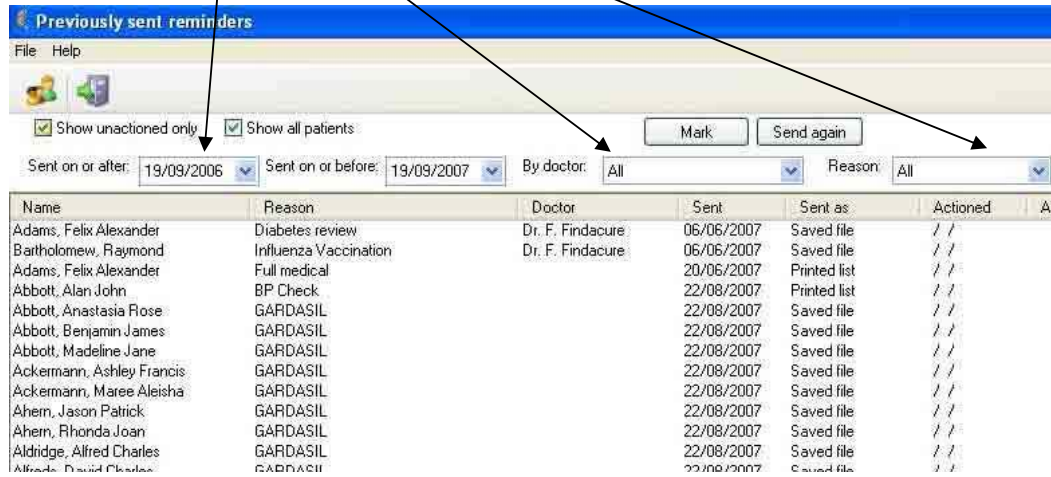


## Previously Sent Reminders

1. To follow-up on Reminders Sent go to **Clinical > Reminders** on the main screen.
2. Once in the **Reminders** screen select **View > Sent Reminders**.



Previously sent reminders will be displayed. You can filter the previously sent reminders by date range, doctor or reason.



3. Previously sent reminder can be deleted from this screen by clicking on **Mark** or alternatively the **Send again** option will take you back to **Send Reminders** (page 9).