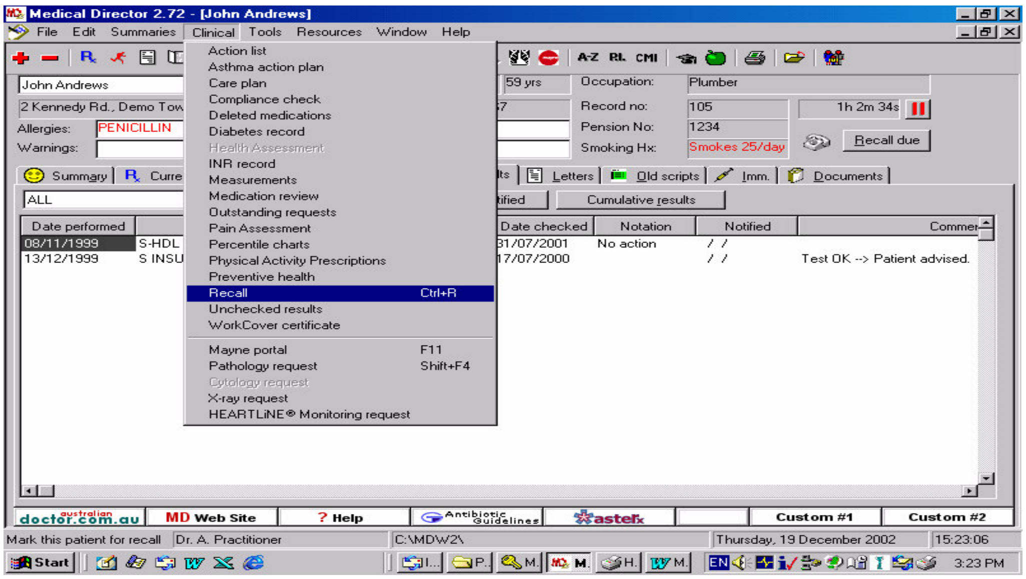
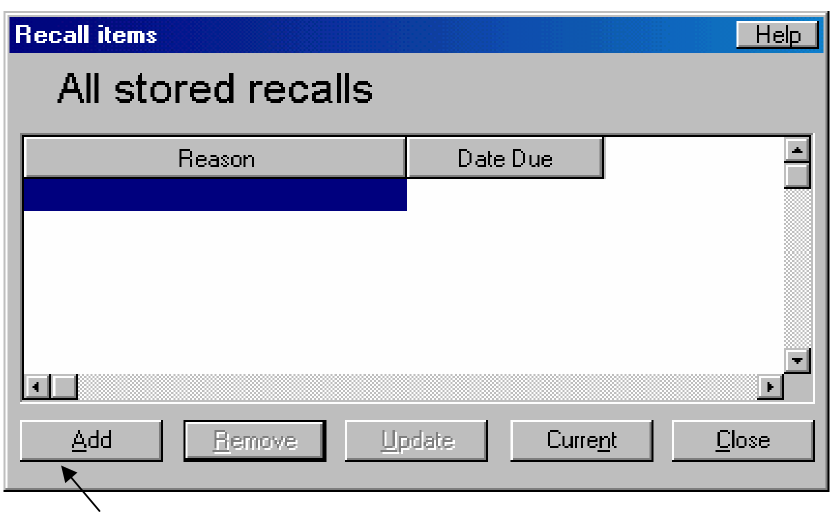
Recalling Patients using Medical Director

Flagging Patients for Recall

While in the patient screen, select ***Clinical*** then scroll down to ***Recall***, as shown below. Try to get into the habit of using the shortcut which is ***CTRL/R.***





Click on the ***Add*** button.

(You can also see what recalls are listed for that patient by clicking on the ***Current*** button.)

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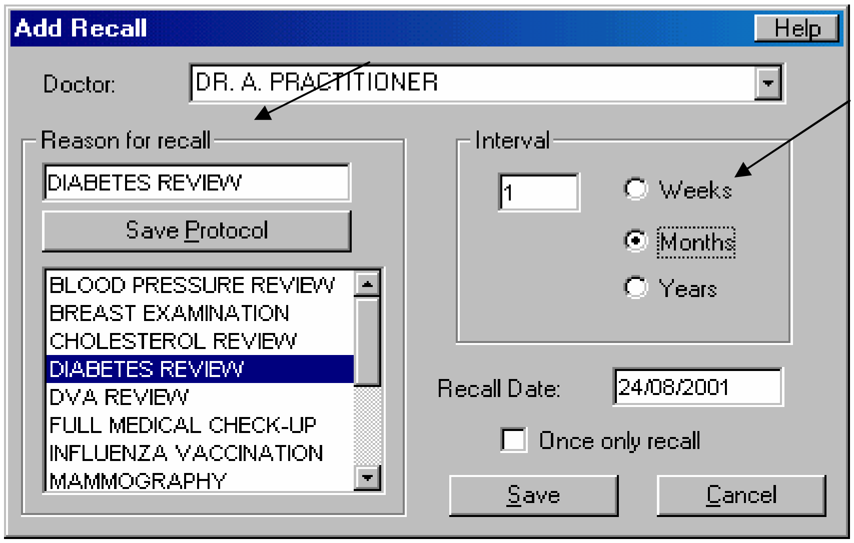
A list of standard recall protocols is displayed. Click on ***Diabetes Review***.

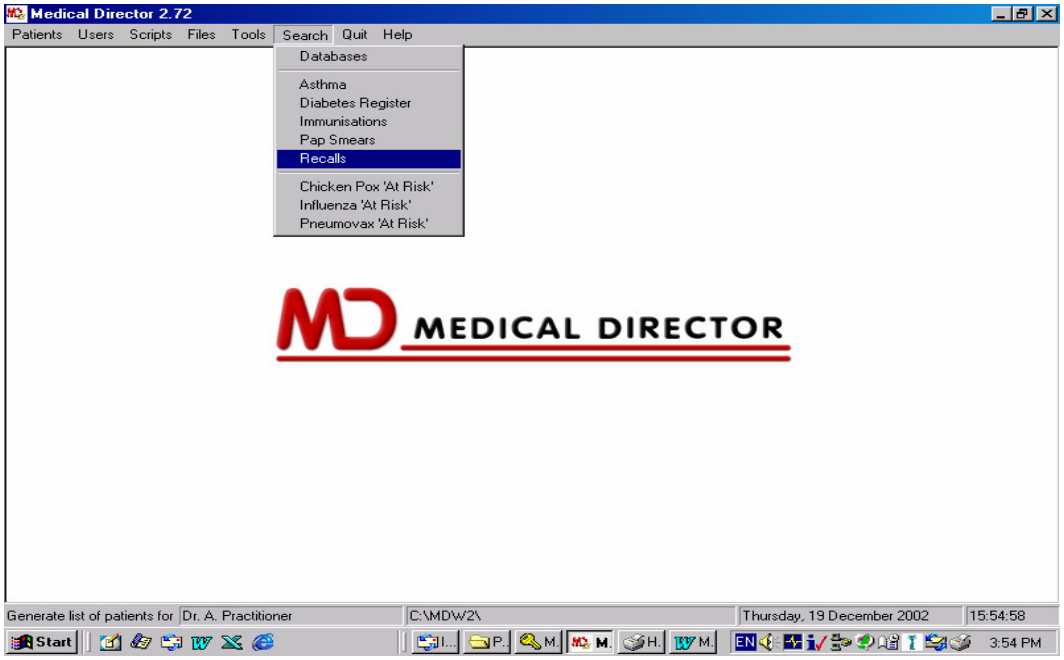


Select the appropriate number of months for recall, the date of the proposed recall will then appear in the ***Recall Date*** box. When you have finished, click on the ***Save*** button. This will save the recall for the individual patient.

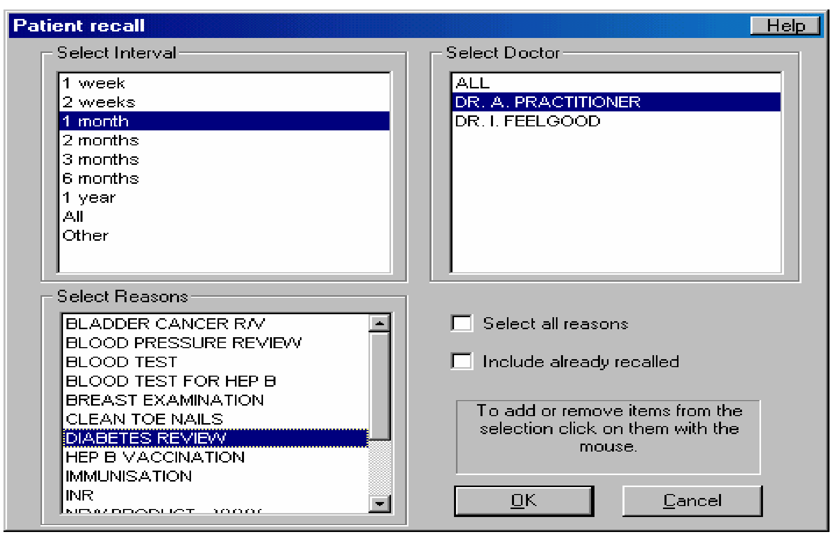
Note: If you ever want to add a separate new protocol then type its name in the ***Reason for Recall*** box, select the ***interval*** and click on ***Save Protocol***. This will save the recall in the list.

Generating Recall Lists

To create a list of patients who are due to recall, from the main menu, choose ***Search*** and ***Recalls***, as shown below:



Choose patients due for ***Diabetes Review*** in 1 month as shown below:



A list of patients will then appear on the screen, see next page.

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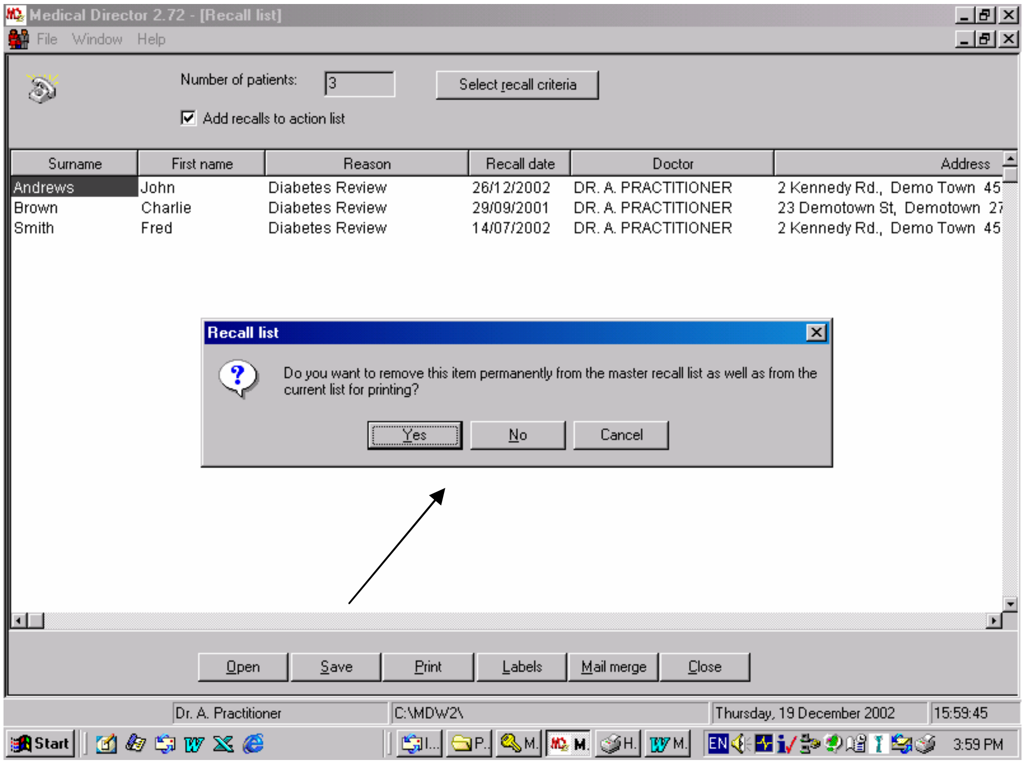
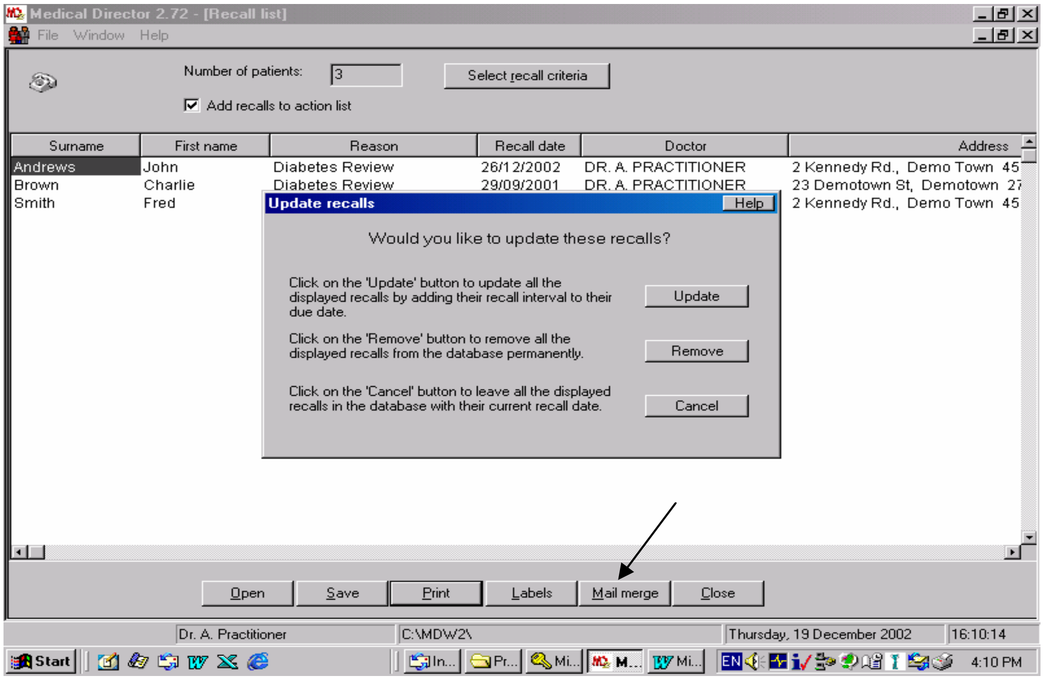


Print the list to check against patient appointments if needed. When the list is printed an ***Update recalls*** box appears (as shown on next page). Click on ***Cancel*** as you do not wish to update the recalls until you have checked the list***.*** This is shown on the next page.

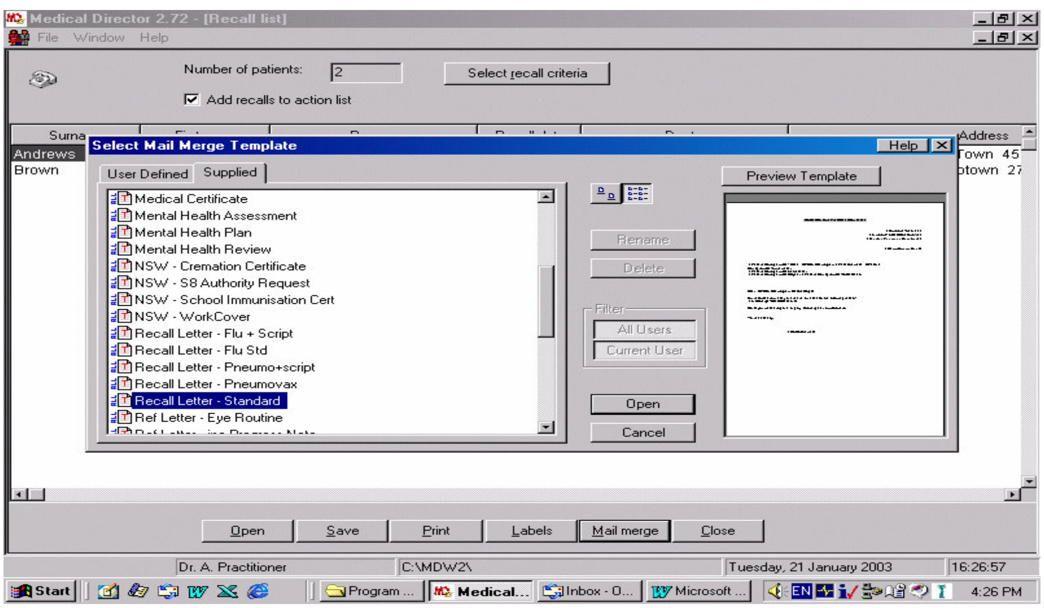
Make sure there is a tick in the ***Add recalls to actions list*** box.

Note: If you don't wish to include a particular patient on the printed recall list list or in a mail merge, highlight their name and press the delete key on your keyboard and a box will appear. By selecting **Yes** you are able to remove the patient from the recall list as well as the current list on the screen. By clicking **No** you will just remove it from the current list but the patient's name will reappear next time you generate the recall list.



Once the printed list has been checked and you are ready to do a mailmerge to send out recall letters, repeat the above process to bring up the list again (that is, go to ***Search/Recalls***). A mail merge can then be performed to send out recall letters to all patients due for recall. Click on the ***Mail Merge*** button (see box above).

Note: Once the next step is completed letters for all patients on the list will automatically be printed.



Click on the ***Supplied*** option. Medical Director will then list options for you to select.

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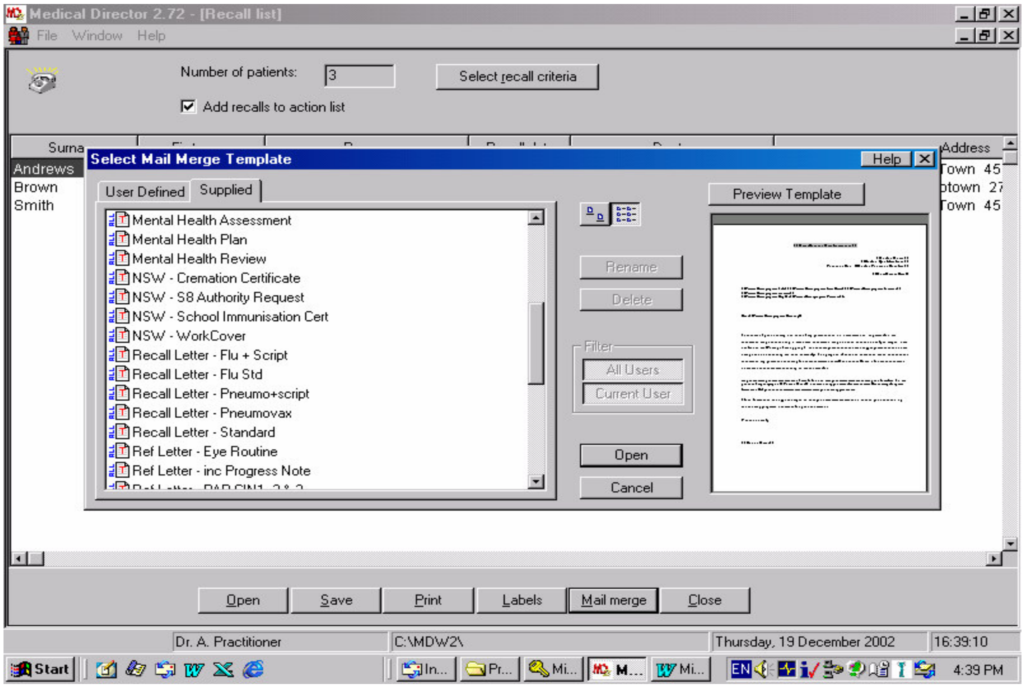
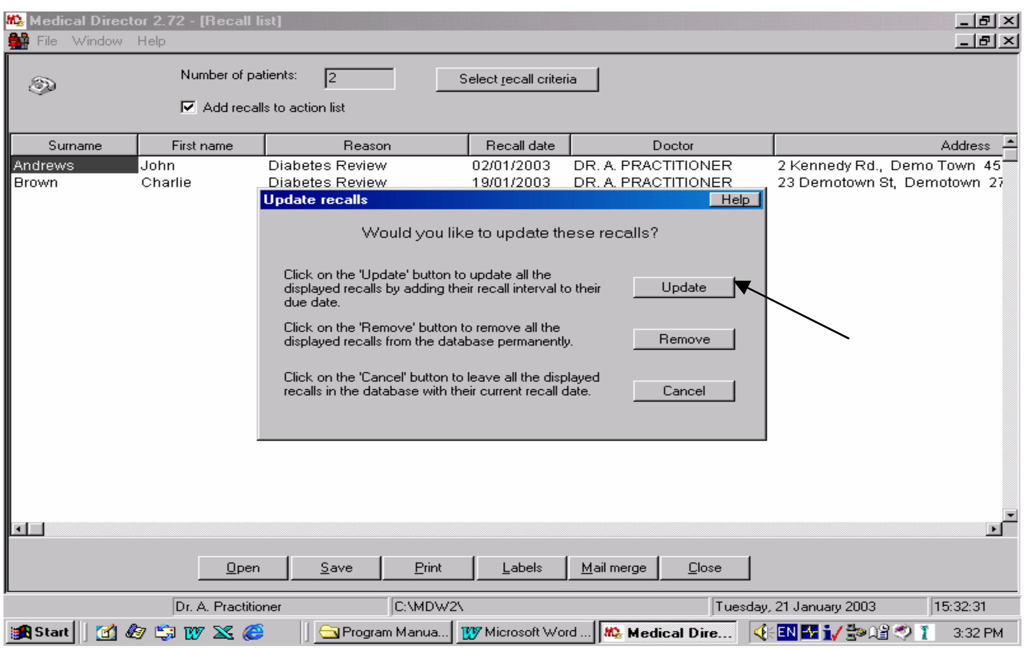
Select ***Recall Letter – standard***, then click on the ***Open*** icon.



Medical Director will then print your list of recalls.

You will be asked to update, remove or cancel your recalls. This time select ***Update***.



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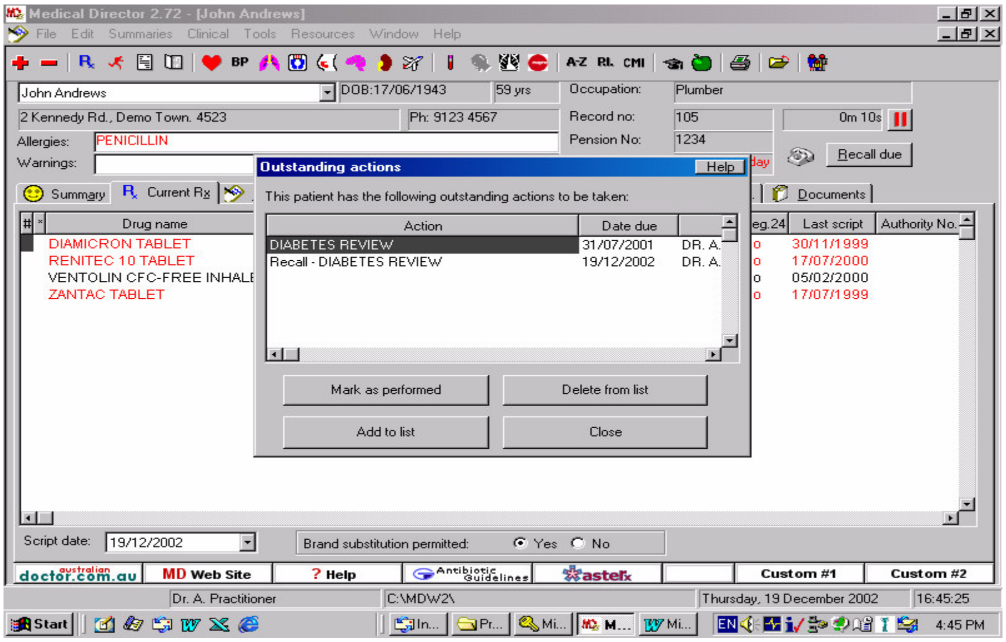
This will update any ongoing recalls and delete any "once only" recalls. The recall reason will then have been added to the ***Actions database*.**

When the patient returns to see you an ***Outstanding Actions*** prompt should appear when you open their record, alerting you to their diabetes review being due.



Click on ***Mark as Performed***, then close.

Important note:
To enable recalls to go into the ***Actions database*** so that ***outstanding actions*** can be notified, it is vital to have the Actions database ***turned on***. To check this, go to the main page and select ***Tools/Options***, then select the ***Prompts*** tab from the box. In the list of prompts scroll down and check that the ***Action List*** box is ticked.

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