

RECALL AND REMINDER SYSTEMS FOR GENERAL PRACTICE

What is the difference between Recalls and Reminders?

Recalls – a recall is used to follow up with patients that have had an abnormal test result and have not been back in to see the Doctor for those results. The practice should phone the patient to request they make an appointment to see their Doctor for the results, if the surgery is unable to contact the patient via the phone then it is recommended that a letter be sent. The practice should record any attempts to contact the patient and after 3 unsuccessful attempts the practice should send a registered letter to the patient to request that they come in for their test results.

Reminders – a reminder is a letter or phone call to regular patients of the practice that the Doctor would like to come in for a consultation for preventative care or screening activities. This may include things like Immunisations, Diabetes Annual Cycle of Care, Aged Health Assessments, GP Management Plans, Team Care Arrangements and ATSI Health Assessments. A reminder does not need to be followed up by the practice staff if the patient does not respond as this is aimed at encouraging the patient to take up preventative care options.

Patient Consent – a patient does not need to give verbal consent for the practice to include them in their recall and reminder systems, implied consent is adequate, it is however advisable that they are informed that the practice does use a recall and reminder system. This can be done by having a sign in the waiting area, and to also note in the practice information sheet that the policy of this practice is to enroll their patients in a recall and reminder system, and if the patient does not wish to participate would they please inform the practice staff and they will be excluded from the list. It is also necessary for the practice to find out from the patient their preferred method of being contacted, either by phone or by sending a letter, and whether or not the staff are able to leave messages either to whoever answers the phone or on an answering machine, this information needs to be documented in the patients file. Otherwise an unlawful disclosure may inadvertently occur.

Planning your recall and reminder system

Before you start planning it is important to consider a few issues.

- What clinical areas will you be using recalls for? i.e. Abnormal tests
- Which preventative activities will the practice use reminders for? i.e. Diabetes Annual Cycle of Care
- Who will be responsible for setting recalls in the patients file or clinical software?
- Who will be responsible for setting reminders in the patients file or clinical software?
- Who will be responsible for generating the recall and reminder lists – practice manager or reception staff.
- How often will the recall and reminder list be generated (e.g. weekly monthly).

- **Recalls** are best dealt with by phoning the patient and when this is unsuccessful then a letter should be sent.
- **Reminders** it may be more time efficient for staff to send letters.
- What procedure will be put in place to check if that patient has responded to the recall? Who will be responsible for maintaining this?
- What procedure will be followed for patients that fail to respond to recalls and reminders?

RECALLS AND REMINDERS FOR PAPER BASED PRACTICES

RECALL BOOK REGISTER SYSTEM

A book may be kept for recalling patients for abnormal results.

Each time the Doctor indicates a need for recalling the patient, details of the recall can be recorded into a book, and should include:

- Patient's name, Date of Birth and file number
- Patient's contact details including phone numbers
- Reason for recall
- Date of recall and how it was done e.g. Letter / phone call
- Follow up recall if necessary
- Date patient attended the consultation for the recall
- Any other system used if unable to contact patient e.g. Registered mail

REMINDER CARD FILE SYSTEM

A simple card file system with each month on it can be used for reminders. Write the patients' name on the card for the month when the reminder is due along with the reminder reason. Each month check the card for the list of reminders due that month and send reminders out to those patients. You can then mark each patient off as they attend the surgery for that reminder.

***Example:** A patient comes in for the flu vaccination in April ask them if they would like a reminder for next year, if so write their name on the card for April next year. Come April next year you will have a list of patients to send reminders to.*

FLAGGING A PATIENTS' FILE

You can flag a patient's file with a colored sticker or some form of coding to remind the doctor when he/she opens the patient's file that a reminder is due for this patient on a certain date for a particular condition.

***Note:** this method only allows for opportunistic reminders when the patient actually presents to the surgery and is recommended to be used in conjunction with or to compliment other reminder systems.*

RECALL & REMINDER SYSTEMS USING MEDICAL DIRECTOR

The recall and reminder system in Medical Director is designed to operate in the following manner:

- The GP or Practice Staff defines the reminder for a patient;
- During a consultation the GP is alerted in the patient's file (by an animated telephone) if a patient has a reminder due within 30 days or overdue;
- Practice staff regularly generate a patient reminder list (e.g. every Friday morning);
- Patients on the list are notified of due reminders by either printing the list and manually contacting patients or by performing a mail merge from the generated list (this is the preferred method as it's recorded in patient notes automatically);
- All patients notified can automatically have their 'regular reminders' updated and 'once only recalls' removed from the system;
- The Actions Database holds a record of all outstanding actions for the patients (this includes recalls & reminders);

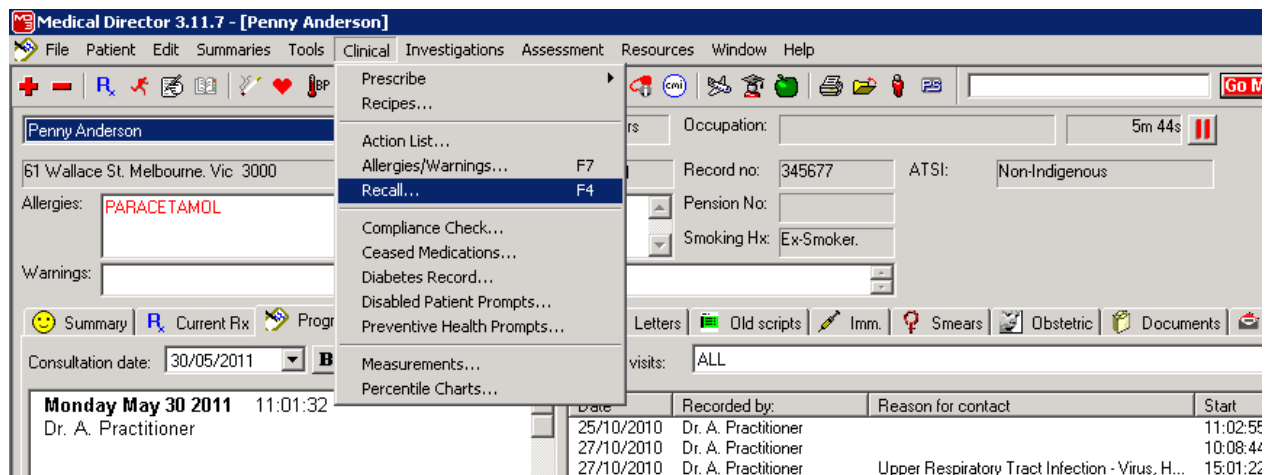
*During a consultation the doctor is prompted with a list of outstanding actions for the patient – to set up **enable prompting** see instructions at the end of this document.*

Adding Patient Recalls

There are several ways to add recall and reminder items to a patient's record. The most common and direct approach is to add them via the patient recall window.

While in the patient record:

- ✚ Select Clinical
- ✚ Scroll down to Recall and click, as shown below.
- ✚ You can also use the shortcut: F4 key



The screenshot shows the Medical Director 3.11.7 interface for patient Penny Anderson. The 'Clinical' menu is open, and the 'Recall...' option is highlighted. The patient's record shows a consultation date of 30/05/2011 and a list of recent visits.

Date	Recorded by:	Reason for contact	Start
25/10/2010	Dr. A. Practitioner		11:02:58
27/10/2010	Dr. A. Practitioner		10:08:44
27/10/2010	Dr. A. Practitioner	Upper Respiratory Tract Infection - Virus, H...	15:01:22

The Recall items window opens which displays all the currently stored recalls:

Recall items		
All stored recalls		
Reason	Date Due	Date Added
DIABETES REVIEW	01/11/2011	03/11/2010
REVIEW	11/11/2011	11/05/2011
PAP SMEAR	03/11/2012	03/11/2010

Buttons: Add, Edit, Remove, Update, Current, View Notes, Close

You then have the option to:

Add – to make an additional reason to recall or remind the patient

Remove – the reason for the patient recall or reminder

Edit – to change the date due for a recall or reminder

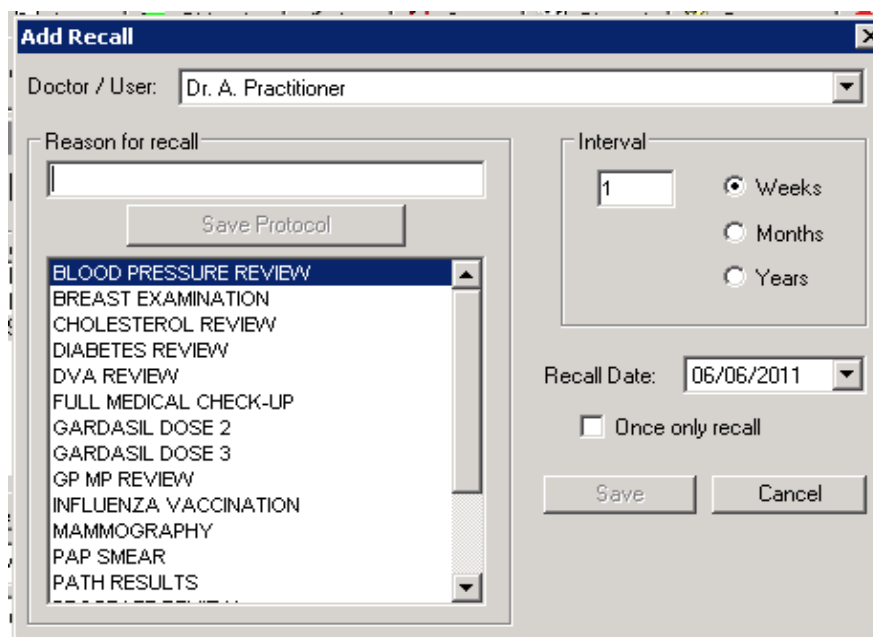
Update – the update button is used to add the original time interval to the current date which updates the recall or reminder with a new due date

Current – will display all recalls or reminders that are due in the next 30 days.

To **Add** a Recall or reminder to a Patient's File:

Click on the **Add** button.

The Add Recall window opens, which displays a list of the standard protocols.



Add Recall

Doctor / User: Dr. A. Practitioner

Reason for recall: [Text Box]

Interval: 1 [Radio] Weeks [Radio] Months [Radio] Years

Recall Date: 06/06/2011 [Dropdown]

Once only recall

Buttons: Save Protocol, Save, Cancel

List of protocols:

- BLOOD PRESSURE REVIEW
- BREAST EXAMINATION
- CHOLESTEROL REVIEW
- DIABETES REVIEW
- DVA REVIEW
- FULL MEDICAL CHECK-UP
- GARDASIL DOSE 2
- GARDASIL DOSE 3
- GP MP REVIEW
- INFLUENZA VACCINATION
- MAMMOGRAPHY
- PAP SMEAR
- PATH RESULTS

Select the reason for the recall or reminder by clicking on that particular protocol: MD

will automatically set the standard interval times for that reason.

You are also able to enter your own reasons for regular recall or reminders by typing it into the text box, then setting the desired time interval, click on **Save Protocol**. This new protocol will be added to the list for future use.

If the reason that you have typed into the text box is a one time only **DO NOT SAVE PROTOCOL** just click on the save button this adds it to the patients file without adding it to the list.

Note: if every reason gets saved to the protocol list it becomes very cumbersome and difficult to find the reason that you are looking for.

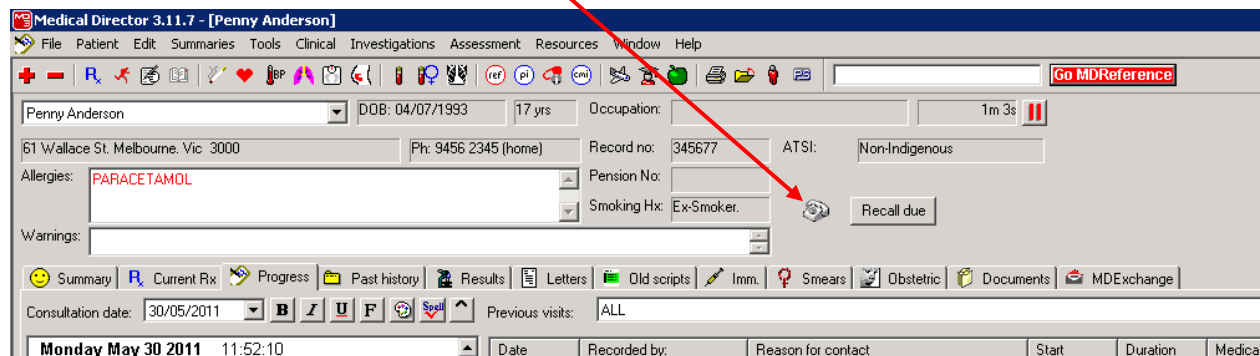
If the set time interval is not what the practice uses this is able to be modified – choose the protocol that needs modifying from the list change the time intervals and then click on **Save Protocol** this will overwrite the existing protocol this will not effect recalls of patients that were previously set – but all new ones will have the new time intervals. Again if it is just a one off time change **DO NOT SAVE PROTOCOL** but just click on save this will then only be changed for that specific recall or reminder.

If the recall or reminder is a once only check the **Once only recall** box – this will mean that the recall cannot be ‘updated’ using the update button and the recall will automatically be deleted after printing the recall list or doing a mail merge.

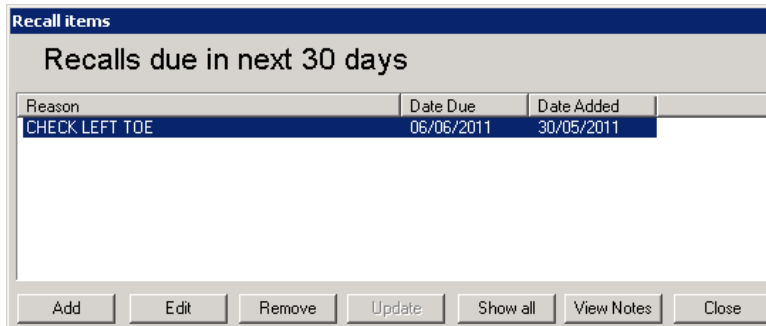
Note: If you wish to delete a protocol – double click on that particular protocol and then hit the delete button on your keyboard.

Managing Patient Recalls during Consultation

When a patient's record is opened, if there are recalls due within the next 30 days a visual alert in the form of an animated telephone is displayed.

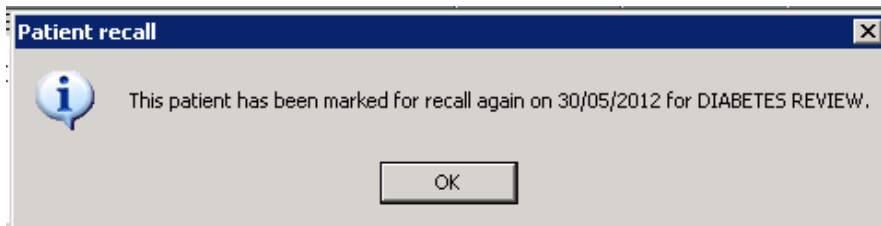


Click the **Recall Due** button next to the animated phone Recall items window opens.

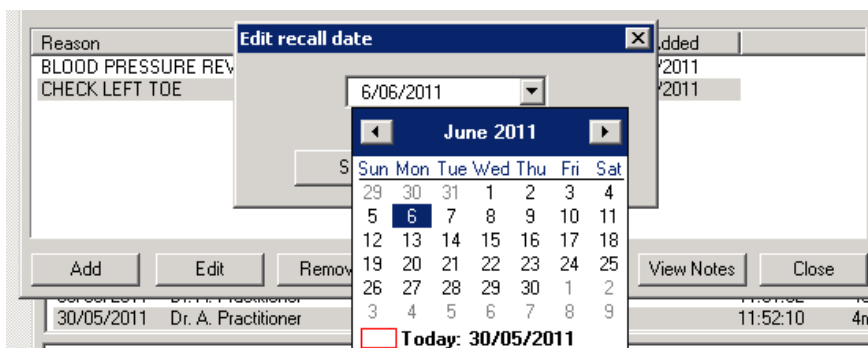


This is virtually the same window as displayed when adding recalls except that it only lists recalls that are due. From here you can **Add** as outlined in above notes. **Remove** and **Update** recalls.

To update a Recall during a consultation highlight the particular recall that you want to update – click on the update button. If the recall is a regular recall item then the original time interval is added to the current date click on OK to save in patients file.





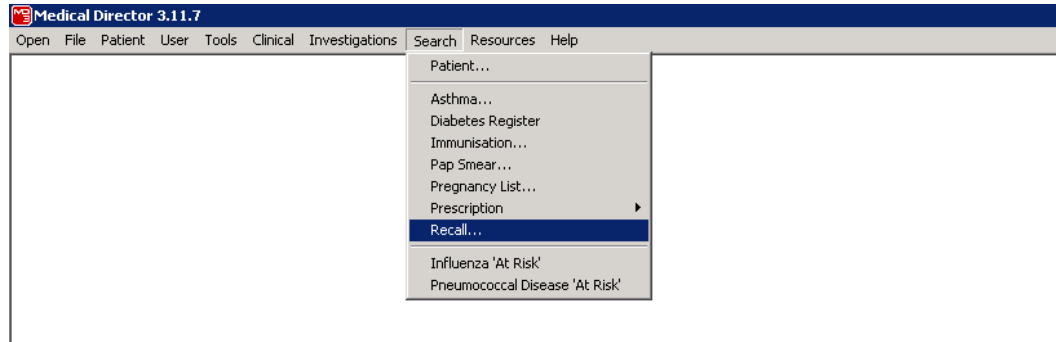
If you wish to choose your own date for the recall – click on the edit button – choose your date from the drop down window.



Recalling Patients and Generating Recall Lists

Patient recall lists can be used to identify and notify patients who are due or will be due for a recall or reminder within a specified period of time. Creating a list of patients who are due is performed in the main menu:

-  Select **Search**
-  **Recalls**



The 'recall list' screen opens and the 'Patient recall' window appears:

Select the Interval – This is the timeframe that you want to look at from the date of generating the list – *i.e. within 1 month from today*

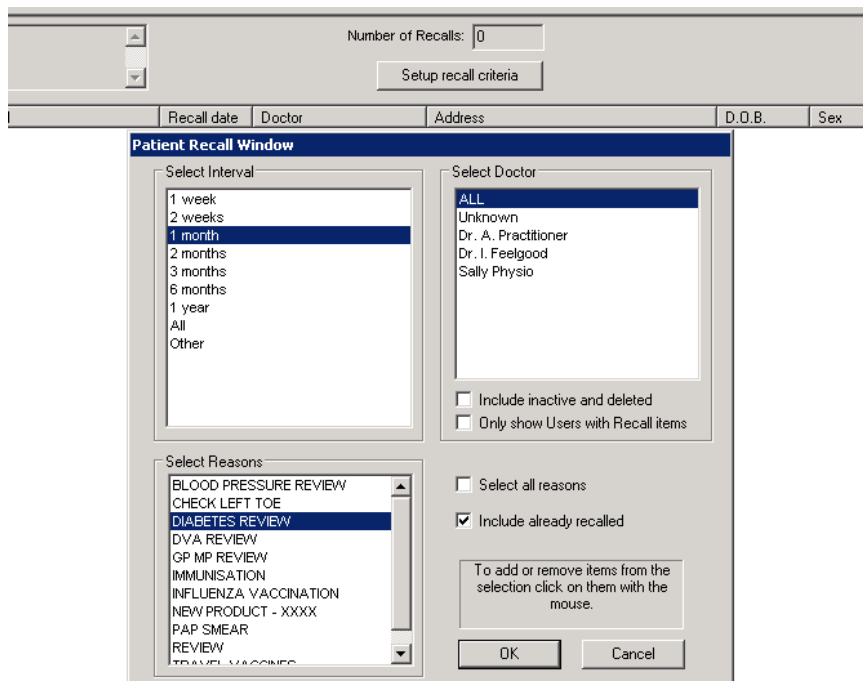
By selecting ALL you will get all recalls that have been set – by selecting other you can choose a start and end date.

Select Doctor – if you wish to only do a recall list for individual Dr's click on that Dr's Name or choose **All** to recall for the whole practice.

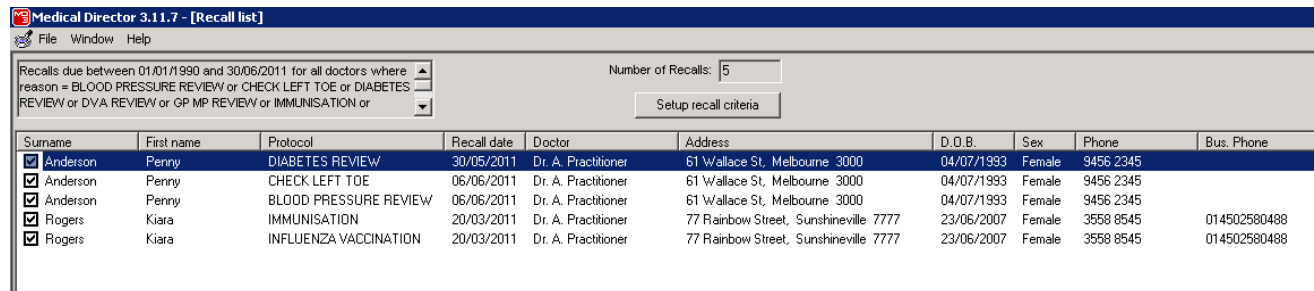
Select the reason – you can select one, multiple or All reasons – to select all reasons check the box that says **Select all reasons**.

You are also able to check the box that states **Include already recalled** – *this will recall those patients that haven't returned for their recall or reminder.*

Once you have entered all the search criteria click on **OK** to generate the list of patients



The patient recall list will be displayed – this list will also include patients with overdue recalls or reminders.



Medical Director 3.11.7 - [Recall list]

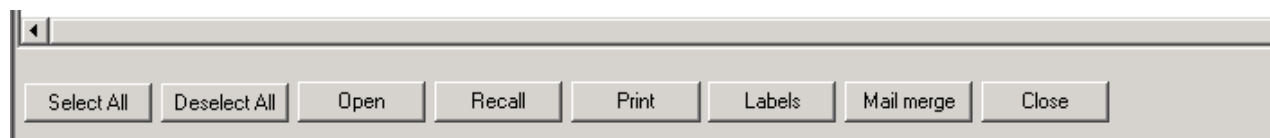
Recalls due between 01/01/1990 and 30/06/2011 for all doctors where reason = BLOOD PRESSURE REVIEW or CHECK LEFT TOE or DIABETES REVIEW or DVA REVIEW or GP MP REVIEW or IMMUNISATION or

Number of Recalls: 5

Setup recall criteria

Surname	First name	Protocol	Recall date	Doctor	Address	D.O.B.	Sex	Phone	Bus. Phone	
<input checked="" type="checkbox"/>	Anderson	Penny	DIABETES REVIEW	30/05/2011	Dr. A. Practitioner	61 Wallace St, Melbourne 3000	04/07/1993	Female	9456 2345	
<input checked="" type="checkbox"/>	Anderson	Penny	CHECK LEFT TOE	06/06/2011	Dr. A. Practitioner	61 Wallace St, Melbourne 3000	04/07/1993	Female	9456 2345	
<input checked="" type="checkbox"/>	Anderson	Penny	BLOOD PRESSURE REVIEW	06/06/2011	Dr. A. Practitioner	61 Wallace St, Melbourne 3000	04/07/1993	Female	9456 2345	
<input checked="" type="checkbox"/>	Rogers	Kiara	IMMUNISATION	20/03/2011	Dr. A. Practitioner	77 Rainbow Street, Sunshineville 7777	23/06/2007	Female	3558 8545	014502580488
<input checked="" type="checkbox"/>	Rogers	Kiara	INFLUENZA VACCINATION	20/03/2011	Dr. A. Practitioner	77 Rainbow Street, Sunshineville 7777	23/06/2007	Female	3558 8545	014502580488

From this screen there are several options which are accessed through the buttons at the bottom of the screen.



Select All – selects all the patients on the list.

Deselect All – uncheck all patients on the list

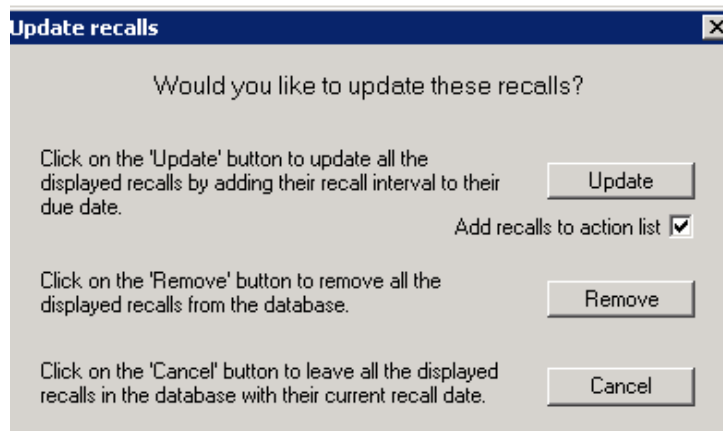
If you wish to choose a specific patient click on Deselect All – then click on the check box at the left of the patients name – any actions will now be just for that patient.

Open – opens the health record of the selected patient

Recall – opens the Add New Recall window

Print – this prints the recall list as seen on the screen

After choosing either Print, Print labels or Mail merge of the list the Update recalls window appears – you can choose which action to do or cancel to leave as is.



Labels – This prints labels to place on envelopes for mailing – this is not necessary if you plan to use window envelopes

Mail merge – By performing a mail merge you can produce a personalised recall letter to each of the patients in your recall list.

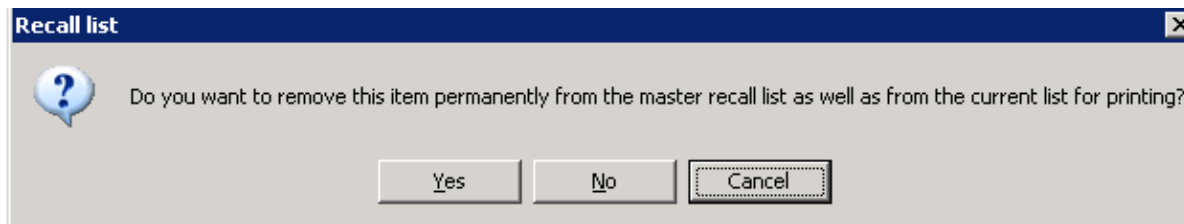
The Mail Merge Template window will appear choose the template that you wish to use

click on Open and the letters will print saving a copy into each patients file for future reference

Medical Director has some supplied recall letter templates or you can create your own.

If you wish to delete specific patients from the list prior to printing or mail merging – highlight the patient that you want to select for multiple patients hold the Ctrl key down while clicking on the relevant patient names then hit delete on your keyboard.

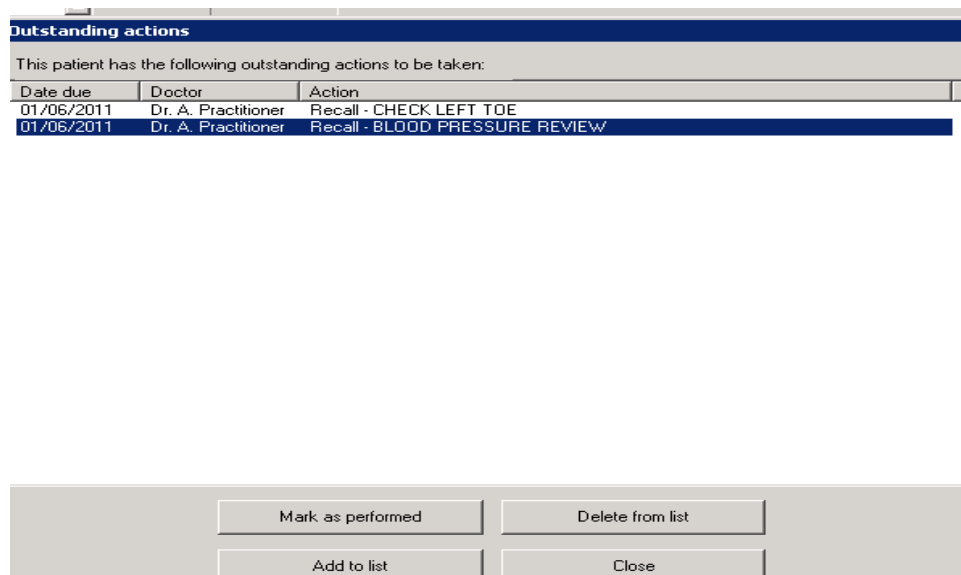
The following prompt will be displayed.



If you choose **Yes** the names will be permanently removed from the recall database list by choosing **No** the names will only be removed from the current list but remain in the database and will reappear the next time a recall list is generated.

When the patient comes in for their visit and you open their health record an Outstanding Actions prompt should appear – the purpose of this is to prompt the Dr that a recall is due for this patient.

Choose the recall that you are going to complete and at the bottom of the window click on **Mark as Performed** this will take the recall off the list so that this window won't open every time the patient record is opened, if there is an old recall on the list that has been completed you can remove it by clicking on **Delete from list**
The **Add to List** button adds a new recall for this patient.

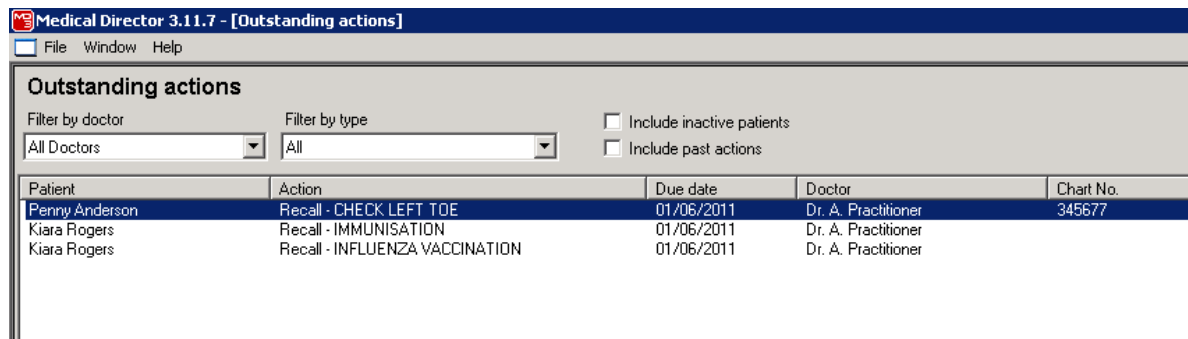


Checking for Outstanding Actions

Once you have sent your recall and reminder letters to patients it is important to follow-up any people that have not attended the practice for an appointment. This is particularly important if you are recalling patients who have had abnormal test results. You can check all outstanding actions by:

In the main screen click on **Clinical** – Outstanding Actions

This will display a list of outstanding actions



Patient	Action	Due date	Doctor	Chart No.
Penny Anderson	Recall - CHECK LEFT TOE	01/06/2011	Dr. A. Practitioner	345677
Kiara Rogers	Recall - IMMUNISATION	01/06/2011	Dr. A. Practitioner	
Kiara Rogers	Recall - INFLUENZA VACCINATION	01/06/2011	Dr. A. Practitioner	

You now have the option to:

Save: Allows you to save the action list as a database file

Print: Print the list of actions

Labels: Print address labels for the patients on the list

Mark: Mark the action as performed; this removes the action from the patient's outstanding actions list


Mail Merge: perform a mail merge using a letter template (as previously described)


Delete: removes the highlighted action from the list

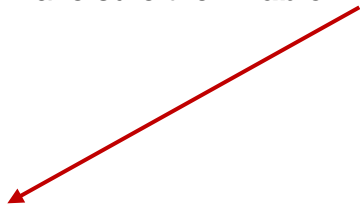
Enabling prompting

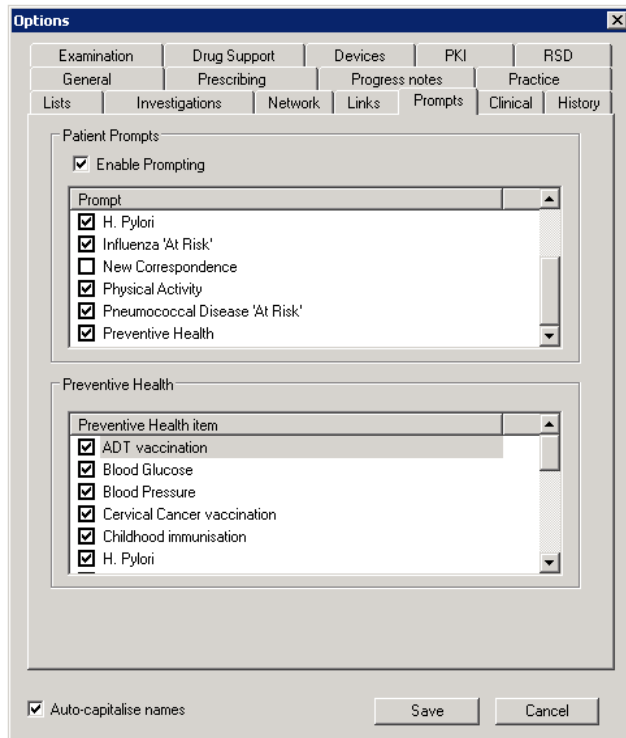
To check that your Actions database is turned on

In the main screen go to

 **Tools –Options**

 Choose the prompts tab and check to see if the appropriate boxes are ticked and make sure the **Enable Prompting** box is checked





Appendix 1

Example of a Reminder Letter

PRACTICE LETTERHEAD

<DATE>

<Patient Full Name>

<Patient Address>

Dear <Patient First Name>

This is a courtesy letter to remind you that, according to our records, you are now due for <recall/reminder reason>.

Please contact the surgery between <operating hours> to make an appointment. Please bring this letter with you when you come for your appointment.

If you have already seen the doctor or visited another medical practice about this issue, please let us know so that we can keep your medical records up-to-date and to remove your name from our recall and reminder list

If you have any difficulties attending the surgery, please let us know as we may be able to assist.

Yours sincerely,

<The Medical Practice>

Or

<Doctor Name>

Appendix 2:

Example of Information that could be used for a Poster for Waiting Room

**This Practice uses a
Recall and Reminder system
to provide preventive care for
our patients**

The Recall and Reminder System assists in ensuring that important health checks and activities are not forgotten and are performed on time.

We may issue you with a reminder letter or possibly a phone call from time to time to remind you when it's time to visit your doctor for a check-up or as a follow-up to health risks that have previously been found.

If you have any questions or concerns about this system please discuss this with your doctor.

If you do not wish to be included in our recall and reminder system please advise reception or your doctor.

Appendix 3:

Example of an Information Sheet for Patients

RECALLS AND REMINDERS

This practice uses a “Recall and Reminder” system to provide preventive care for its patients.

This assists in ensuring that important health checks are not forgotten and are performed on time. You will be reminded when it is time to visit your doctor for a check-up or as a follow-up to health risks that have previously been found. The reminder system will include checks to help in the prevention or early detection of certain conditions such as diabetes, high blood pressure, high cholesterol and some types of cancer – particularly cervical and prostate cancer, and immunisation follow-up.

In some cases, the reminders can also be sent from other places, e.g. the government Pap smear registers (for the detection of cervical cancer).

We will use information from your health record to tell us the check-ups for which you are due and when you should visit your doctor to discuss the tests that are needed. We may issue you with a reminder notice from time to time via a letter or possibly a phone call to remind you about these check-ups.

By allowing us to send you these reminders, you will help us to detect serious conditions early and to monitor known conditions. This can significantly improve the long-term health outcomes for you.

When you have had your tests please make an appointment with your Doctor for you to be able to get your results – due to the privacy act results will **NOT** be given over the phone

Even when you agree to be included in the Recall and Reminder system, you should remember when you should be tested for certain conditions and should always contact your doctor to get the results of a test that has been performed. We may not always be able to reach you, especially if you have moved and the contact information on your record has not been updated.

Please discuss with your doctor any concerns or questions you have to do with the Recall and Reminder system. If you do not wish to be included in our recall and reminder system please advise reception or your doctor.

Adapted from the RACGP’s “Recall Notice”