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Setting up an Electronic Recall Management System

- a Guidebook for General Practitioners using Medical Director 2 and Medical Director 3 -

By Noel Stewart

Acknowledgments:
These notes have been prepared by Noel Stewart of Knowledge Training, specialists in the preparation and delivery of computer training courses for General Practitioners. The authors gratefully acknowledge the assistance and support of the North East Valley Division of General Practice in the creation, trialing and delivery of the course.

Please note:
This booklet has been written for users of both Medical Director 2 and 3. Where there are differences in instructions these are reflected in the notes. Some screen shots may have minor variations, depending on the MD version and operating system you use.

The layout is for back to back colour printing.

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Table of Contents

Part 1 – Recall and Reminder System Overview

An electronic recall and reminder system allows a medical practice to set up an efficient system that notifies patients of the need to make an appointment to see their doctor. Most of this is achieved electronically using clinical software. There are, however two diverse aspects of the process – the ***clinical*** aspect whereby the doctor makes the medical decision to recall a patient and the ***administrative*** side where the practice staff generate recall lists and notify the patient, either by phone or letter. A successful system requires a team effort between GPs and Practice Staff so that the clinical and administrative functions work correctly.

In order to set up an efficient recall system there are various steps that need to happen.

1. Get the patient database up-to-date by either deceasing or inactivating patients. In this way you will not be sending letters to deceased patients or those patients who have moved away from your practice.

2. The doctor must know how to mark a patient for recall. This must be done in a consistent way – choose from a list of recall reasons rather than typing in your own reason. This stops different variations appearing on a recall list, such as:
   Hep B, hep/b, Hep-B, hepatit B, hepatitis B.

3. As the recall reason appears on a letter to the patient it must be written in a way that the patient understands – use Hepatitis A/B rather than Twinrix.

4. The recall reason should also be specific – don't use the generic "immunisation" for adults when the recall is for the specific "Hepatitis B".

5. The practice must decide on the content of the recall letter. Do you use the supplied recall template that comes with your software program, or do you compose your own with wording that more closely reflects the philosophy of the practice?

Critical decisions to be made when setting up an electronic recall system

1. How often do you create the recall lists and notify the patients. Daily, every 2 days, weekly, monthly?

2. What is the interval for the recall (how far ahead)? Weekly, fortnightly, monthly?

3. At what stage do you remove the patient from the recall list?
   - as soon as the patient list is printed?
   - as soon as the mail merge is completed and letters sent?
   - when the doctor sees the patient?

4. Who contacts the patient? Doctor or practice staff?

5. How do you follow up those patients that do not respond to the initial recall.

In most cases it will be a process of trial and error before a practice settles down with a process appropriate to their needs. What follows in this book are a few suggestions based on over 200 practice visits, from solo practices to large group practices.

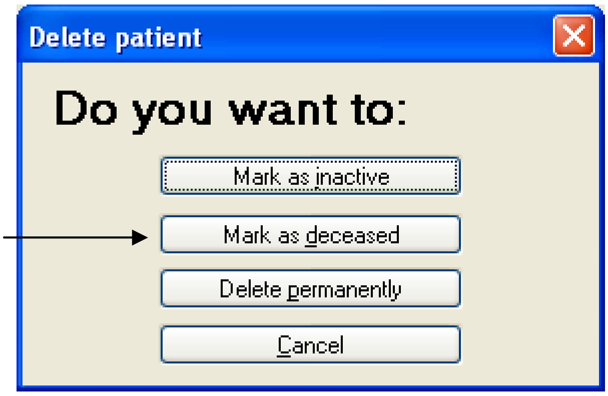
Part 2 – Cleaning up the database

"Deceasing" a patient

Even if you "decease" a patient in your practice management software they also need to be deceased in Medical Director (except MD3/Pracsoft 3).

1. Call up the list of patients (press <F2> if necessary).

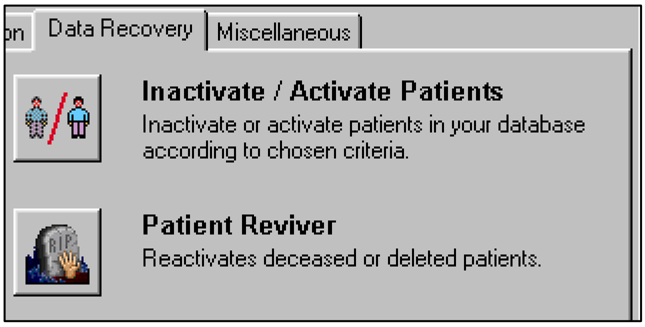
2. Type in the first few letters of the deceased's surname and select the name from the list. Click on the **Delete** button (or press the Delete key on the keyboard). Click on the *Mark as deceased* button.



3. Type in the date of death (if known) and click **OK**.

To view a deceased patient's record

1. MD2 - From the Main menu: **Files** > **Patients** > **View** menu and select **Deceased - Patients**.
   MD3 - From the Main menu: **Patient** > **List…** > **View** menu and select **Deceased - Patients**.



2. Highlight the patient whose record you wish to view and from the **File** menu select **Open**.

Removing tutorial patients

You may have installed the tutorial files when you first installed Medical Director – these are the Andersons and the Andrews. There will also be some dummy specialists and maybe even Doctor Practitioner. All of these can be removed by using the **Remove Samples** utility program in the **Medical Director Maintenance** program.

How to do it

1. Make sure that Medical Director is not running on any computer on the network.

2. Double click on the **Maintenance** icon on the desktop to open the Medical Director Maintenance program

3. Click on the **Data Management** tab.

4. Click on the **Remove Samples** button and then follow the onscreen directions to remove All **Patients** and **All Specialists**.

Part 3 – Adding Recalls

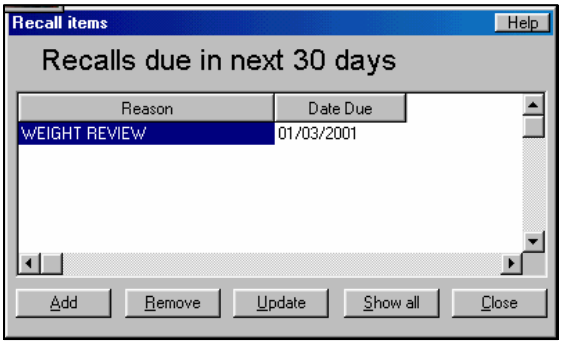
Not only does the GP need to know how to use the clinical software program to invoke a recall but s/he must also ensure that recalls are:

- *consistent* – where possible choose from a list of recall reasons rather than typing in your own reason.
- *written in a language the patient understands*
- *specific* – don't use the generic "immunisation" when the recall is for a specific immunisation such as "Hepatitis B"

While in a patient's screen, it is possible to mark that patient for future recall for any reason you wish but, for consistency select from the drop down list where possible. When you do type in your reason for recall DO NOT use abbreviations. Remember the reason for recall will appear on your correspondence with the patient.

In a group practice it will be much more efficient if all GPs of the practice use the same recall reasons.

When a patient's record is opened, the system checks for any recall due within the next month. If any are due, a **Recall due** button and a ringing telephone indicator will appear in the top right section of the screen.



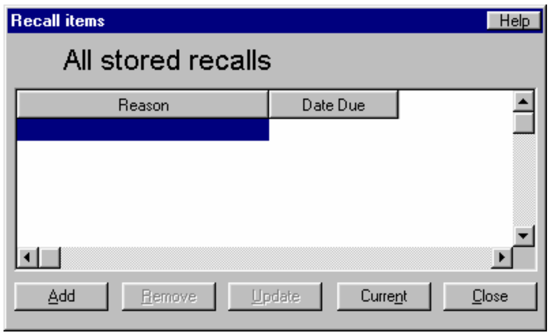
Adding a clinical recall

1. Open one of the patient's records.

2. From the **Clinical** menu select **Recall** and the Recall items window is displayed.

   (Clicking on the **Current** button will display the Recalls for the next 30 days.

   Clicking on the **Show all** button will display all stored recalls).

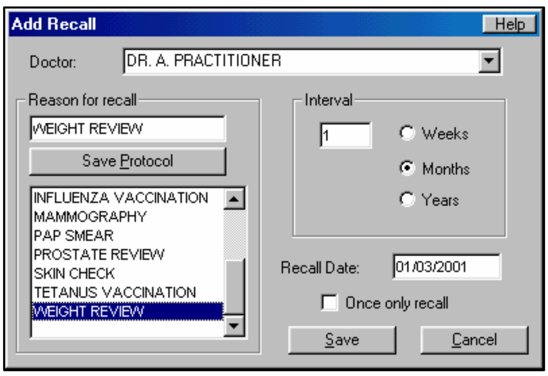


3. Click on the **Add** button.

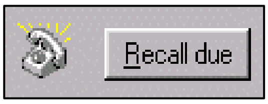
4. From the Recall list, scroll down to Weight Review and select it by clicking on it once.

5. For the Interval select 1 month. If it is a "one off" recall click on the **Once only** recall box. Click on **Save**.

6. Click on **Close** when back in the Recall items window.



7. Once back in the Patient's medication window you will see a ringing telephone with a **Recall due** button next to it.



8. Click on the **Recall due** button and the Recall items window will display the recalls due in the next 30 days.

9. If you wish to see whether the patient is also marked for any other recalls, even though they may not be due yet, click on the **Show all** button. Click the **Current** button to see only the currently due recall list.

10. If you no longer wish a patient to be marked for recall for a condition, then highlight it in the recall list and click on the **Remove** button.

    The **Update** button will recalculate the recall interval for an ongoing recall.

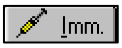
11. Click on the **Close** button to close the Recall item window.

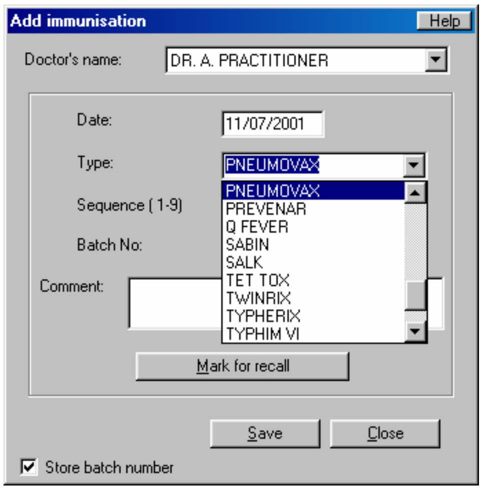
12. On returning to your Progress Notes the recall will have been automatically added to the Actions window (unless Progress Notes have been disabled through one of the Options choices).

Immunisation recalls

Both adult and children's immunisation are linked to the recall system of Medical Director. When you invoke a recall, however, the reason for recall is listed as IMMUNISATION. In most cases you would want to change this to reflect the specific immunisation being given.

Adding an immunisation recall





1. Open a patient's record (make sure it is a patient over the age of 18) and open the Immunisation page by clicking on the **Immunisation** tab.

2. Open the Add Immunisation window by either:
   - clicking on the red plus sign in the tool bar, or
   - right clicking the mouse and selecting New Item, or
   - pressing <F3>

3. From the Type: drop down menu select PNEUMOVAX.

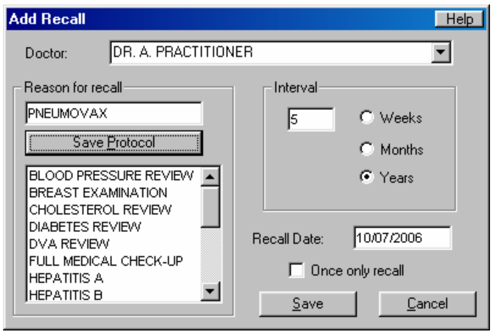
4. Type in the Batch No: P 0906 76601
   (In subsequent pneumovax vaccinations it will default to the last batch number).

   Leave the Sequence (1-9) and Comment: boxes empty.

5. Click on the **Mark for recall** button. You will notice that it defaults to the generic IMMUNISATION as the reason for recall. In many cases this would be too vague to appear in a recall letter.

   Type in PNEUMOVAX as Reason for recall and set the interval to 5 Years (or choose it from the drop down list if it is present).

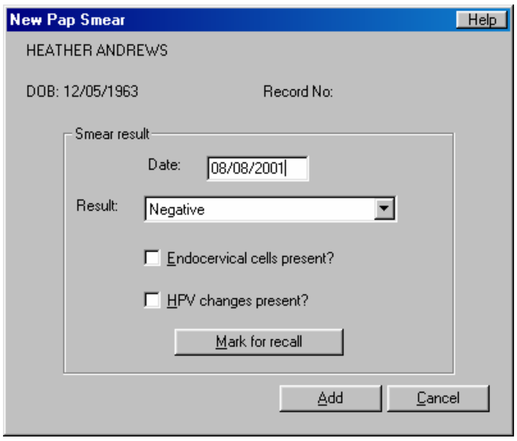
   Click on the **Save protocol** button – this will ensure that in subsequent recalls PNEUMOVAX will appear in the drop down list with an interval of 5 years.



6. Click on the **Save** button.

7. Once back in the Add Immunisation window click on the **Save** button.

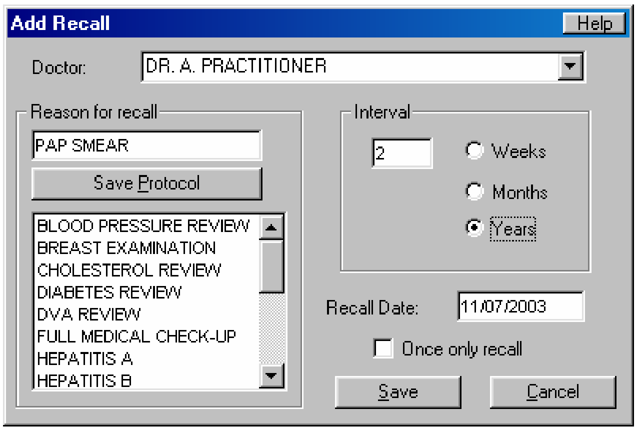
Pap smear recalls



Routine recalls for pap smear are quite often treated separately from other recalls. A practice may also use a list of routine pap smear recalls generated from a particular pathology laboratory. Medical Director allows you to enter results and retrieve your own pap smear recalls from its own built-in pap smear database.

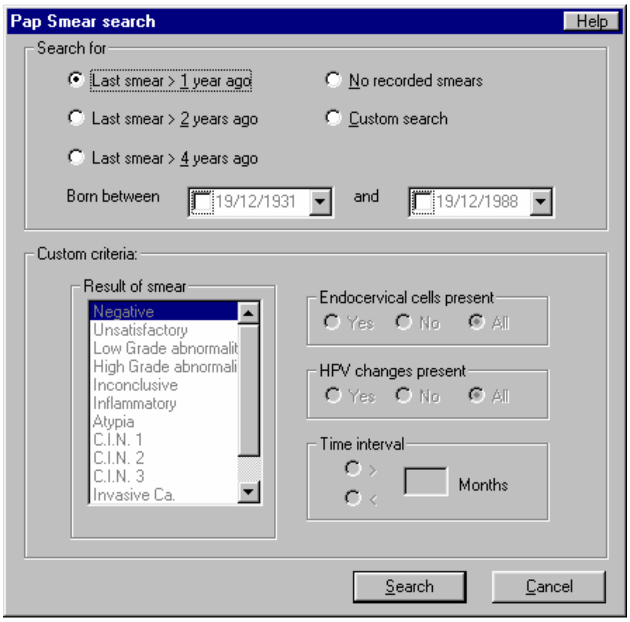
Adding a pap smear recall

1. Open the record of an adult female patient and click on the **Pap smears** tab.



2. Right click in the middle of the screen and select **New item**.
3. Fill out the details and then click on the **Mark for recall** button.
4. Once the Add Recall window appears (it defaults to PAP SMEAR) with a 2-year interval. Click on **Save**.

Interrogating the pap smear database



1. With no patient record open go to the **Search** menu and select **Pap Smears**.
2. The Pap smears search window gives you several options, such as:
   - last smear > 1 yr ago
   - last smear > 2 yrs ago
   - no recorded smears
   - a custom search with a variety of criteria
3. Click on **last smear > 2 yrs ago** and click on **Search**.
4. A list of patients will appear and by clicking on the **Mail merge** button you can select from the templates. You would have to create your own Pap Smear recall template using LetterWriter (see later section).

Where else do I find recalls

In the above examples you saw that Recalls are generated from:

- the patient screen – Clinical menu – Recall (Control + R)
- Immunisation screen
- Pap Smear screen

Recalls can also be generated from other parts of the program:

- Health Assessments (patients over 65). Clinical – Health Assessment
- Pathology results when checking the holding file. Tools – Check Investigation Results – View – Mark for Routine Recall
- Progress Notes – Review – Select Date – Add to recall database
- Search – Asthma – Recall
- Search – Diabetes – Add Recall
- Search – Chicken Pox – Recall (MD2 only)

Mail merge *letters can be generated from:*

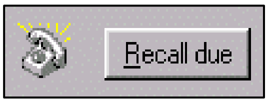
- Search – Databases (MD3 Search > Patients…)
- Search – Asthma
- Search – Immunisations
- Search – Pap Smears
- Search – Recalls
- Search – Chicken Pox ‘At Risk’ (MD2 only)
- Search – Influenza ‘At Risk’
- Search – Pneumovax ‘At Risk’
- Files – Outstanding Actions (MD3 Clinical > Outstanding actions)

Removing a recall

During a consultation you may notice the Recall telephone “bouncing” on the screen – this simply means a recall is due within the next 30 days. You may be therefore in the position to deal with it now. Once the recall has been dealt with you will need to remove the recall so that the patient does not get notified of it again.

Exercise – Removing a recall

1. The patient’s record from the previous exercise should still be open and the **Recall due** button and the ringing telephone should be displayed.



Click on the **Recall due** button.

2. Click on the **Show all** button of the Recall items window.

3. Click on **Weight Review** to highlight it and then click on the **Remove** button.

4. Click on the **Close** button.

Part 4 – Contacting Patients

Overview of recall and actions database

Medical Director allows you to call up lists of patients that are due for recalls within a specified time frame, e.g. all recalls due in the next week, fortnight or month.

These lists of recall patients can be saved, printed, mail merged or printed as labels. If mail merged Medical Director provides a number of pre-set letters (templates) that you can use to send recall letters to all the patients in the patient lists you have created. You can also create your own recall templates.

When you Print, Save, Print labels or Mail merge the list you will be asked whether to update the recall list or leave it as it was. By leaving it you allow the doctor to remove the recall during the consultation when the patient returns.

When a mail merge is performed, a copy of the letter generated is stored in the patient's correspondence file.

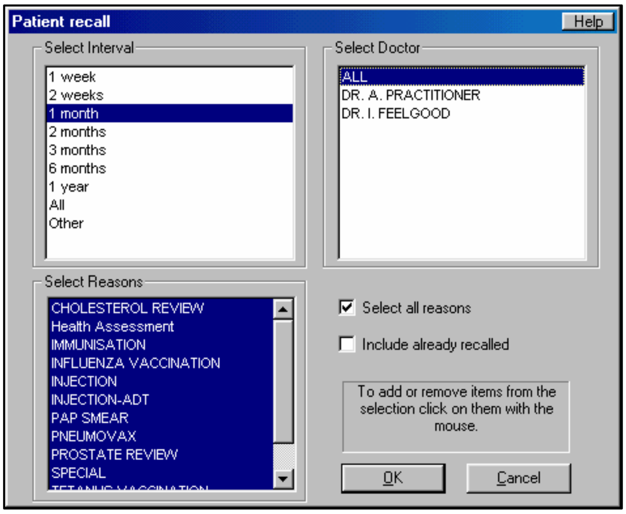
After printing, mail merging or saving the list, all of the recall entries are entered into the **Actions database**. When a patient's record is opened, this Actions database is checked to see if the patient has any outstanding actions to be taken, and these are displayed in an **Outstanding actions** window. This window has buttons to allow the doctor to either delete the action or mark it as having been performed.

The **Outstanding actions** list for a patient can be viewed at any time by selecting **Action list** from the **Clinical** menu.

Note: *You must login with at least Basic Access in order to be able to create recall and reminder letters that can utilise the Medical Director database of patient information.*

Creating recall lists

In the following exercise you print a recall list and then send out a reminder letter for all the recalls that are due in the next month. This is an administrative/clinical function and is performed when no patient details are displayed.



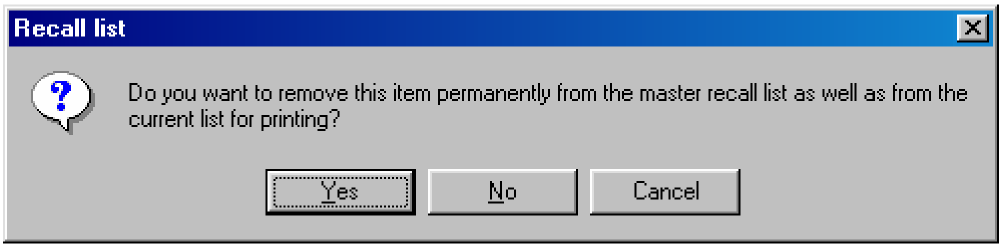
1. Close any patient record that may be showing – from the File menu select **Close patient** (or click on the **Close this patient's record** button).

2. From the **Search** menu select **Recalls**.

3. In the **Select Interval** box select **1 month**.

4. Click on the **Select all reasons** checkbox. Click once on any of the highlighted recalls (such as PAP SMEAR) you don't want – this will remove them from the recall list box. Then click **OK**.

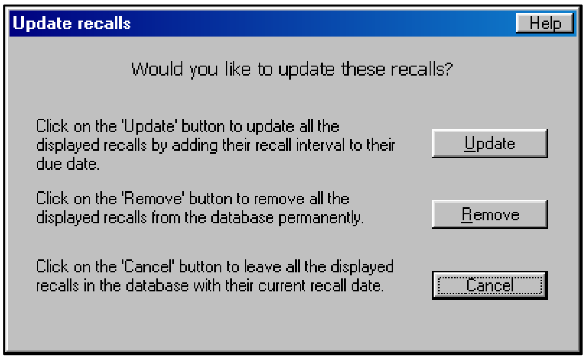
5. A list of patients fitting the criteria will be displayed. If you don't wish to include a patient in the printed list click on the patient's name and then press the delete key on the keyboard.



By clicking **Yes** you are able to remove the patient from the recall list as well as the list on the screen.

6. Click on the **Print** button at the bottom of the screen – the list generated here can be used to cross check with the practice's appointments and the doctors may wish to also check the list for accuracy. The printed list can also be used if the practice wants to contact the patients on the recall list

7. Once the list is printed the following **Update recalls** window appears.



Click on **Update** and this will update any ongoing recalls and delete the "once only" recalls.

Click on **Remove** and this will delete all recalls, even the ongoing ones. Only use this option if you are "cleaning up" a messy recall database.

Click on **Cancel** so that the recalls remain valid – choose this option if you want the doctor to remove the recall during the consultation when the patient returns. This means the "ringing" recall button will appear in the patient's window when a recall is due within 30 days.

8. Once the list has been checked by the doctors and the appointments you can repeat the above procedure, but click on the **Mail Merge** button at the bottom of the screen.

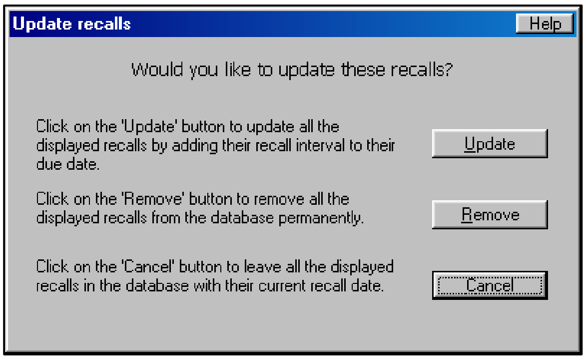
IF IN A TRAINING SESSION STOP HERE!! ONCE THE NEXT STEP IS COMPLETED MEDICAL DIRECTOR IMMEDIATELY PRINTS ALL LETTERS.

9. Click on the **Supplied** tab and from the list of displayed templates select the **Recall letter - Standard** and click on **Open**.

10. You will be again prompted to **Update**, **Remove** or **Cancel**.

    By selecting **Update** or **Remove** the Recalls are moved into the **Outstanding Actions database**.

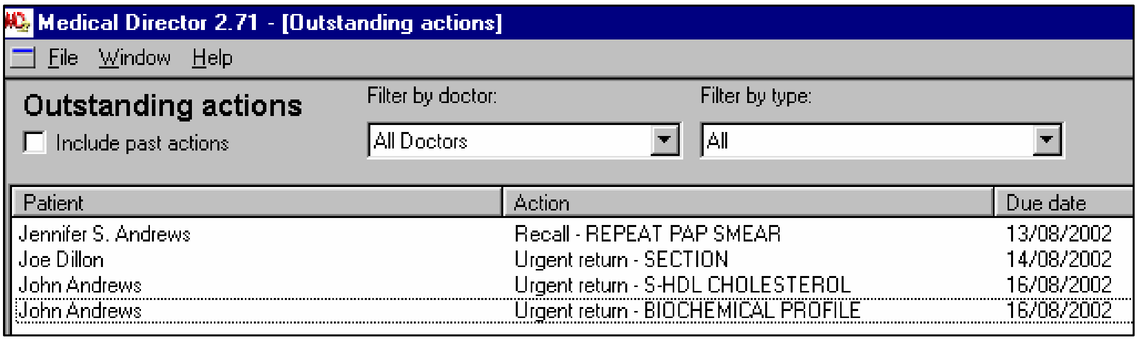
    Selecting **Cancel** will mean that the "ringing telephone" will appear on the patient's screen when a recall is due within 30 days.



11. Once printing is complete close the Recall mail merge letter and then close the Recall list and Letter Writer to return to the main screen of Medical Director.

Checking the outstanding actions

If a patient does not return for the appointment s/he is left in the *Outstanding actions database.* This is because the doctor has not deleted or marked as performed the *outstanding action.* You should check the outstanding list on a regular basis to ensure that patients have been notified of abnormal results (the Return Urgently option when checking pathology). The *Outstanding actions database* also includes the patients who have not responded to a recall. You may wish to send them a follow up letter or give them a phone call.



1. With no patient record open go to the **Files** menu and select **Outstanding Actions**. (MD3 Clinical > Outstanding actions)

2. Check the list and **Delete** any patients who should not be on the list.

3. Click on the **Mark** button if the action has been performed.

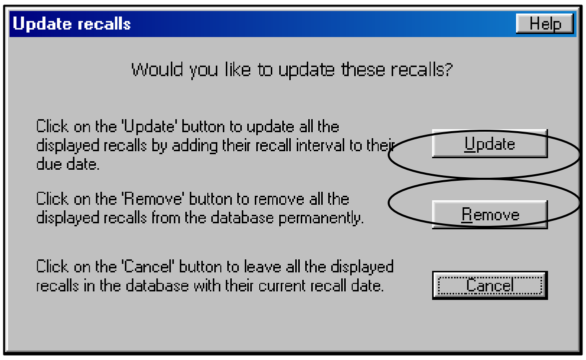
4. Click on the **Print** button to print the list and check with the doctors.

5. Click on the **Mail merge** button and then choose an appropriate template and print the letters. You may have to create a special follow up letter template for this purpose.

Part 5 – Making appointments and the patient returns

In the previous section recall lists were generated and it is possible to contact patients by phone from a printed list or to send out a letter advising the patient to make an appointment.

The patient makes an appointment and now returns. What happens?



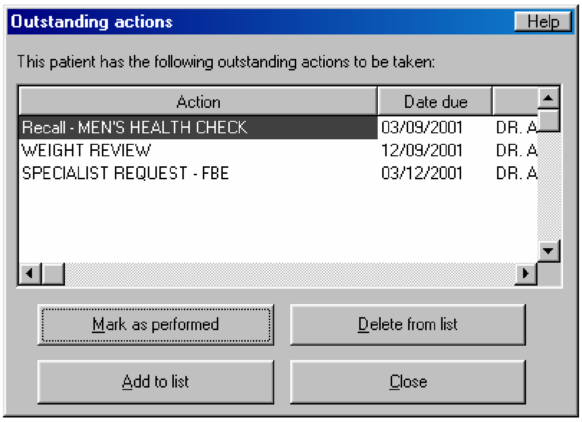
Scenario 1 – the recalls have been removed or updated

If, after having printed, saved or mail merged a recall list you have the choice of **Update**, **Remove** or **Cancel**.

MD2: **Update** and **Remove** will add the Urgent recalls to the **Outstanding Actions** database.

MD3: **Update** will add the Urgent recalls to the **Outstanding Actions** database. **Remove** removes the Recall from Recall list but DOES NOT send them to **Outstanding Actions** database.

1. The patient presents for the consultation and the doctor and on opening the patient's record an **Outstanding actions** window appears showing the doctor very clearly if and what recalls need to be performed and, if necessary, deleted.

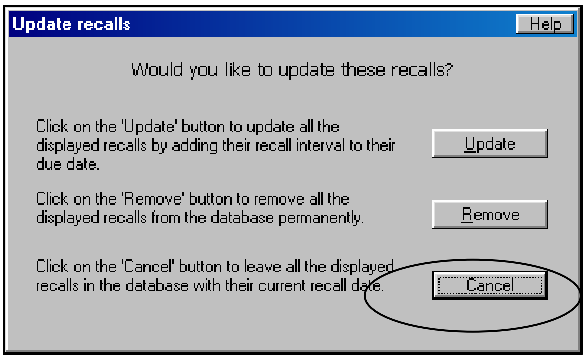


2. Once in the patient's record there will be no ringing telephone to suggest that a recall is due within 30 days.

3. By checking the patient's correspondence file the doctor will find copies of the recall letters that have been sent out.

   A patient's Outstanding actions can be checked by going to the **Clinical** menu and selecting **Action list**.

Scenario 2 – the recalls have been cancelled



If, after having printed, saved or mail merged a recall list you have the choice of **Update**, **Remove** or **Cancel**.

By selecting **Cancel** the recalls are not added to the **Outstanding actions** database.

1. The patient presents for the consultation and the doctor opens the patient's record.

2. An **Outstanding actions** window may appear from previous recall operations. But, because **Cancel** had been selected after the recall list has been printed or merged those recalls are not in the **Outstanding actions** window.

3. The "bouncing" telephone next to the **Recall due** button will alert the doctor which recall is due.

4. By checking the patient's correspondence file the doctor will find copies of the recall letters that have been sent out.

Which recall system to use?

The above examples do outline some of the choices that you have. Which system do you use? Different practices use different systems. The only way to work it out is to try one system and if it works for you then stick with it. If not, change. Whichever way you use you will have an initial "bedding down" period before you settle on a system that best suits your practice.

Part 6 – Customised Recalls

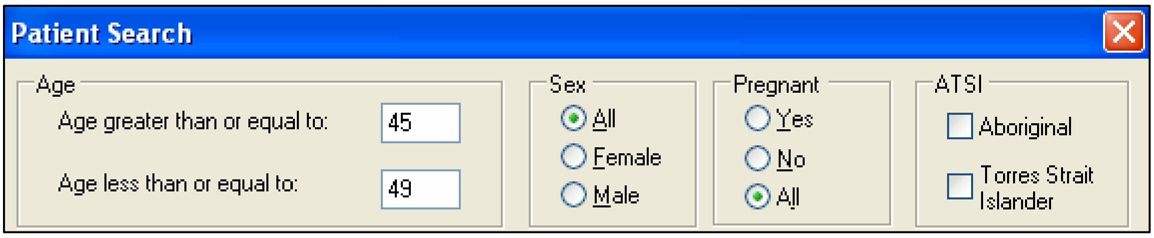
In the following example you will send out a letter to all your patients between 45-49, reminding them that they should make an appointment for a 45 -49 health check (item 717). A template for this is available on the NEVDGP website.

Exercise – Customised recall

1. Make sure that there is no patient record open.

2. **MD2**: From the **Search** menu select **Databases** – you may get a message stating that the process could be slow from a work station. Click **Yes** to continue.
   MD3: From the **Search** menu select **Patient…** – you may get a message stating that the process could be slow from a work station. Click **Yes** to continue.

3. Set the following selection criteria, as shown:
   - **Age greater than or equal to:** 45
   - **Age greater than or equal to:** 49
   - **Sex:** All



4. Click on the **Search** button. 

5. A list of patients fitting the criteria (patients between 45-49) will appear.

6. Click on the **Mail Merge** button for this window to appear.

   IN A TRAINING SESSION STOP HERE!! ONCE THE NEXT STEP IS COMPLETED MEDICAL DIRECTOR IMMEDIATELY PRINTS ALL LETTERS.

7. From the list of displayed templates select the ***45 - 49 year old Health Check*** letter and click on **Open**.

Additional Exercises

1. Use the **Clinical/ Databases** to create a list of patients that have had Daonil prescribed.

2. Create a list of all female patients between the ages of 15 to 75.

"At risk" influenza vaccine search tool

This tool generates a list of patients meeting the NH&MRC criteria for influenza vaccination. The search can be performed for either all patients over the age of 65, or for patients under 65 who would benefit from Influenza vaccination.It may be used as a substitute for the **Clinical/Databases** function which allows you to generate a list of the over 65 year olds for the annual Influenza vaccination.

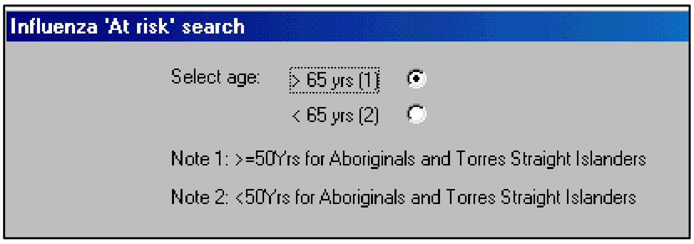
The advantage of the "at risk" tool is that the list generated will exclude any patients:

- who have been marked as allergic to Influenza vaccine
- who have previously been marked as not for Influenza vaccine prompts in the Preventive Health screen
- who have had an Influenza vaccination recorded on their immunisation tab this calendar year.

Once the list has been generated, it can be saved, printed or used for a mail merge in the same way that other search results can be used.

Exercise 1 – Creating the over 65 "at risk" list

1. With no patient record open go to the **Search** menu and select **Influenza 'At risk'**



2. The default setting is for the over 65 year olds (50 years ATSI).

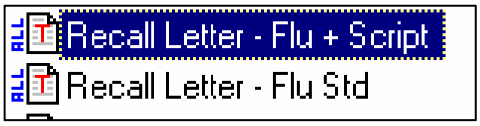
3. Click on the **Search** button and this will generate a list of patients who fit the criteria.

   READ THE FOLLOWING DIRECTIONS BUT DO NOT COMPLETE THE FOLLOWING STEPS AS MULTIPLE SCRIPTS AND FLUVAX REMINDER LETTERS ARE GENERATED.

4. Click on the **Print Scripts** button at the bottom left of the window – when this button is clicked, a window allows you to select from the available Influenza vaccine brands. You are then able to print a prescription for every patient on the list.

5. Click on the **Mail Merge** button at the bottom of the window – you are taken to the **Select Mail Merge Template** window.

6. Click on the **Supplied** templates.



   Choose the Recall LETTER – Flu + Script template if including a script with the reminder letter,
   OR
   Choose the Recall Letter – Flu Std template if no scripts are to be included.

Pneumovax 'At Risk' and Chicken Pox 'At Risk'

These 2 "at risk" searches work in a very similar way to the Influenza 'At Risk' search.

1. Generate the patient list using the **Search/…'At Risk'**

2. There is a recall letter for both Pneumovax and Chickenpox (MD2 only) in the **Supplied** templates when you select **Mail merge**.

Part 7 – Organising and Cleaning Up Recalls

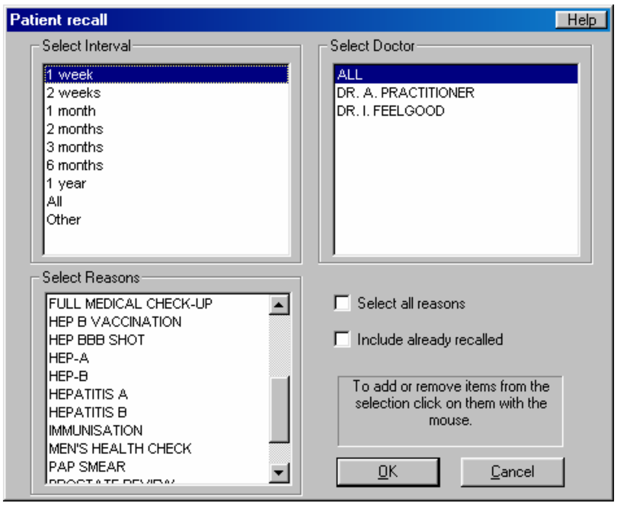
As a practice you will need to have a meeting of all GPs and the Practice Manager to:

- clean up existing recalls
- set up the recall protocols

Cleaning up the recalls

The doctor or doctors of a practice may have started using the recall system but used:

- different names for the same recall
- abbreviations for recalls
- non-specific names

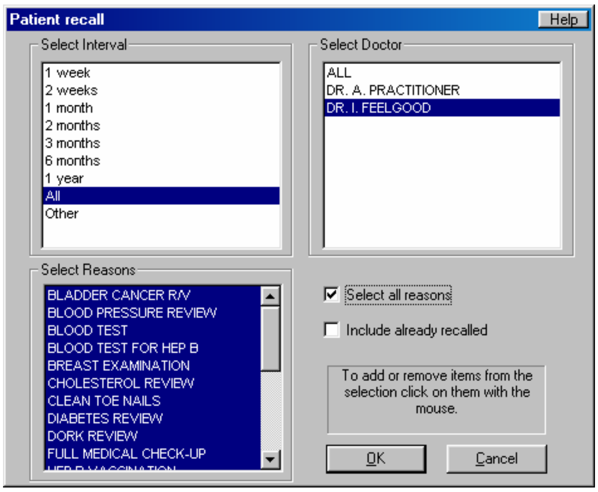


The example opposite shows you the inconsistencies with hepatitis A and B. Ideally you would want only HEPATITIS A and HEPATITIS B to appear in the list.

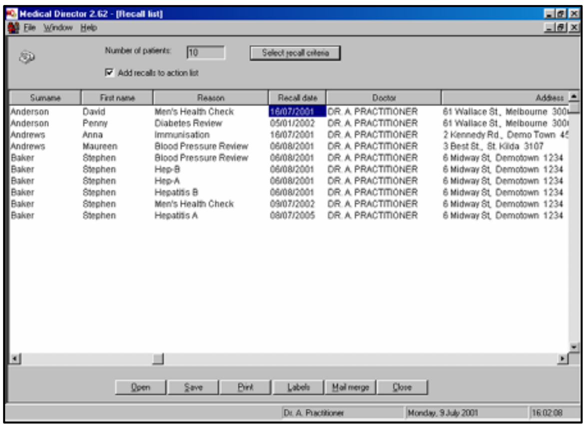
Deleting unnecessary recalls

1. With no patient record open from the **Search** menu select **Recalls**. Under Select reasons you will see listed all the Recall reasons that the doctors of the practice have entered for their patients.

   You cannot delete the recall reasons from here.



2. To check on individual doctor's recalls select the Interval as All, Click on the doctor's name under Select Doctor and click in the Select all reasons box.



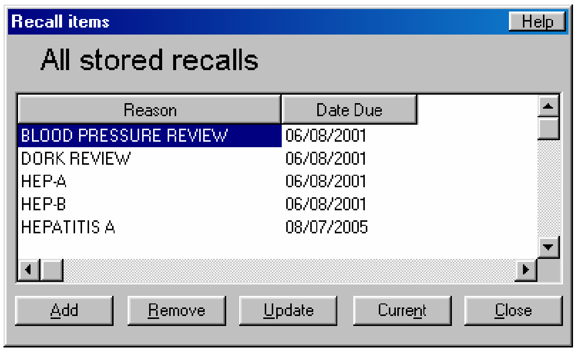
3. Once you click **OK** all the recalls for that particular doctor will be displayed.

   It may be worthwhile to print the list and manually check with the appointments system.

4. To delete the recalls click on the unwanted recall to highlight it, then press the delete key on the keyboard.

Deleting recall reasons

The above exercise displayed all the recalls that have been invoked by the doctors of the practice. You may now wish to delete some of the recall reasons.



1. Open any patient's record .and from the **Clinical** menu select **Recall** (or press Control + R).

2. Once the **Recall items** window opens, click on the **Add** button.

3. The **Add Recall** window now opens.
   MD2: Click once on the unwanted recall reason and press the delete key on the keyboard.
   MD3: Hold the mouse pointer on the unwanted recall reason (hold down mouse button) and press the Delete key on the keyboard.

4. Continue the process until all unwanted recall reasons are deleted.

Setting up recall protocols

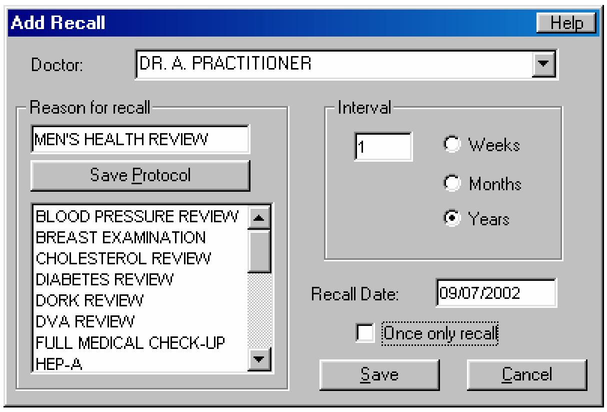
Once you have deleted the unwanted recall reasons as in the exercise above you would now want to add those recall items that you want to appear in the list. To do this you set up your own recall protocols. The recall protocol is

- the name (or reason) of the recall
- the interval, or time when the recall is due
- whether its are a "once only" or an "ongoing" recall.

Adding recall reasons

1. Open any patient's record.

2. From the **Clinical** menu select **Recall** (or press Control + R in MD2 or <F4> in MD 3).



3. Once the **Recall items** window opens, click on the **Add** button.

4. The **Add Recall** window now opens.

5. Type in the reason for recall (such as MEN'S HEALTH REVIEW.

   Make the Interval 1 Year and leave the Once only recall box unchecked.

6. Click on the **Save Protocol** button – this will make this recall reason available for all patients. DO NOT click on the Save button as this would add a recall for the patient whose record you presently have open.

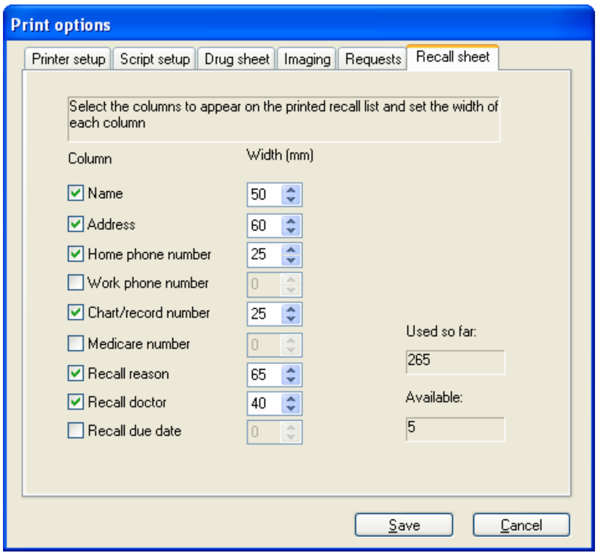
7. Add other recall reasons as appropriate, remembering to click on the **Save protocol** button after each new recall reason.

Adding the date to the Recall printout

When you generate a list of Recall patients (Search/Recall) the date of the recall appears on the screen. When you print the list the date of the recall does not appear on the printed list.

You can, however change this.

1. From the **Tools** menu (Main menu or patient screen) select **Print Options** and then click on the **Recall Sheet** tab.

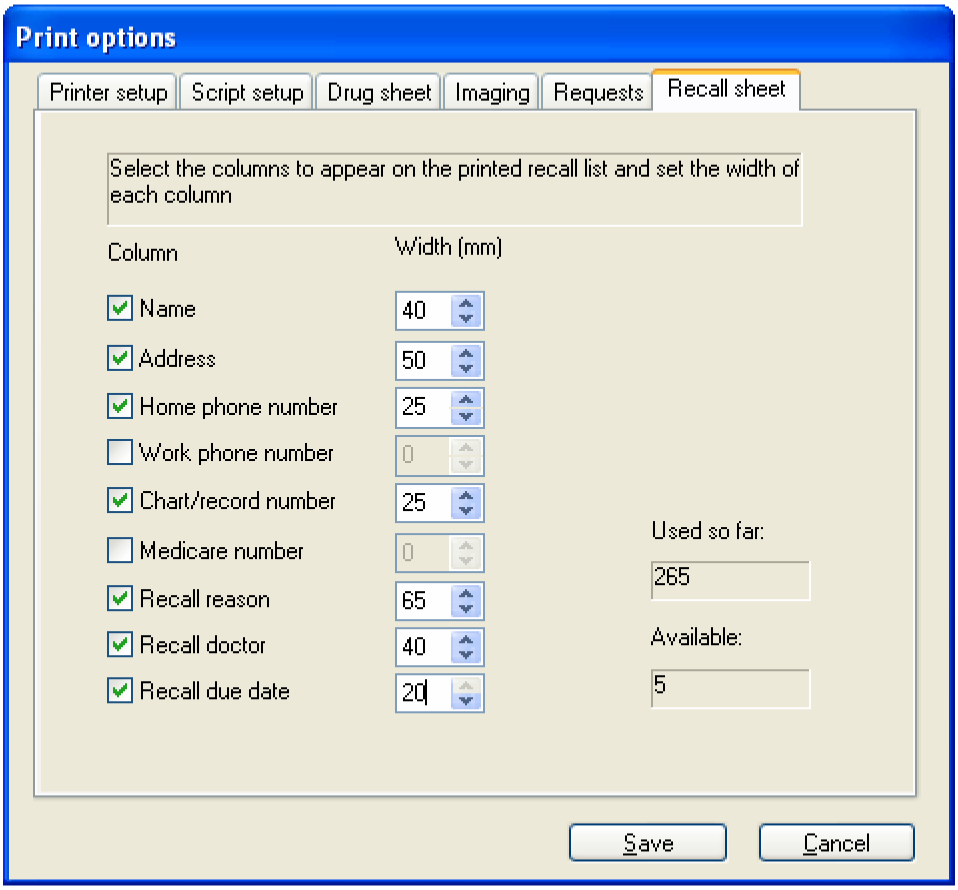


2. Click in the last box on the **Recall due date** – this will place an arrow in the box.

3. Add the width value of 20 (20mm). You will need to reduce the width of some of the other fields to compensate for this.

   For example reduce both the Name and Address by 10mm each.

   The values should be similar to what is illustrated below.



Part 8 – Setting up Recall Templates

Overview of templates

Templates are pre-formatted letters that can be set up with your own layout and content and saved for repeated use. Medical Director has its own set of built-in templates, which you can use immediately (called **Supplied** templates).

You can modify the Supplied templates to better suit your practice, or templates can also be created from scratch. Any template you modify or create from scratch are called **User Defined** templates. A template can be saved so that all users can access it or be used only by the creator of the template.

Supplied recall templates

Medical Director comes with many supplied recall templates.

The **Recall Letter – Standard** template can be used with a general clinical recall. The example on the left is the template showing the fields. The example on the right is how a mail merge fills in the specific details of a particular patient.

<<Miscellaneous:Practice Letterhead>>

<<Doctor:Name>>
<<Doctor:Qualifications>>
<<**Doctor:Provider Number**>>

<<Miscellaneous:Date>>

<<Patient Demographics:Title>> <<Patient Demographics:First Name>> <<Patient Demographics:Surname>>,
<<Patient Demographics:Address>>,
<<Patient Demographics:City>>. <<Patient Demographics:Postcode>>.

Dear <<Patient Demographics:Greeting>>

Our records show that you are due for recall for the following reason:
<<Mail Merge:Recall Reason>>

Could you please ring this surgery to arrange an appointment.

Yours sincerely,

<<Doctor:Name>>

Park Street Clinic

Dr. A. Practitioner
M.B.,B.S., Dip R.A.C.O.G.
610234a

17th July 2001

Mr David Anderson,
61 Wallace St.,
Melbourne. 3000.

Dear David

Our records show that you are due for recall for the following reason:
Weight review.

Could you please ring this surgery to arrange an appointment.

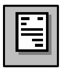
Yours sincerely,

Dr. A. Practitioner

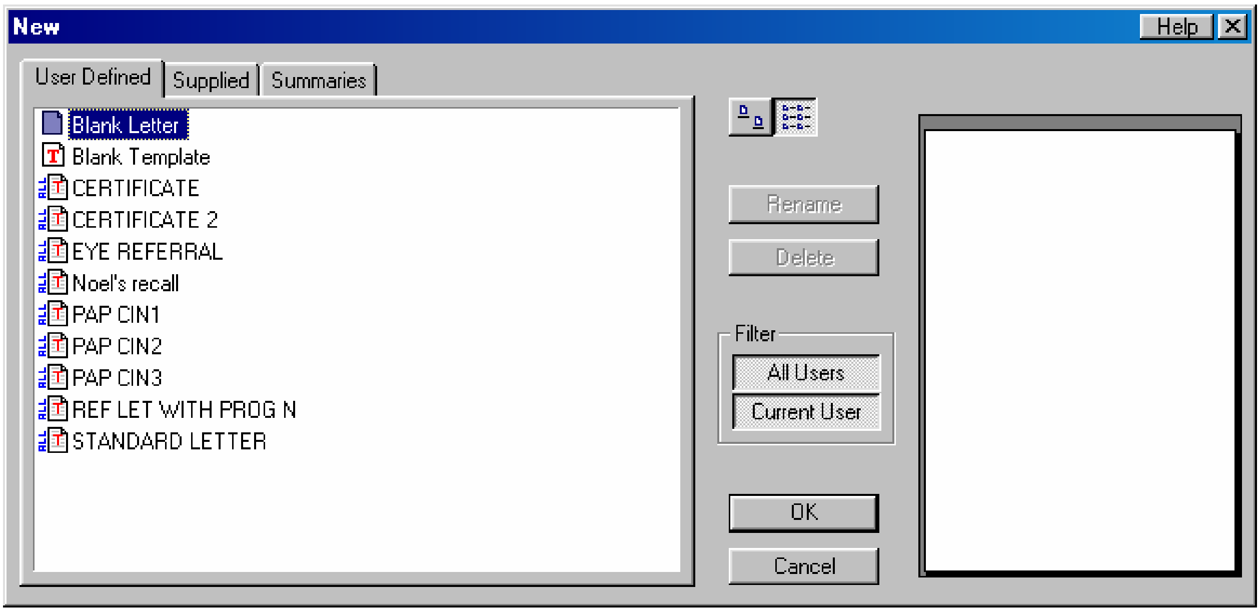
User defined templates

Under **User Defined** you will find the templates that you have used in previous versions of Medical Director or ones that you have created or modified yourself.

To view existing User Defined templates



1. Make sure a patient's record is open and click on the **LetterWriter** button.
2. From the **File** menu select **New**.
3. The list of **User Defined** templates is displayed.



Modifying templates

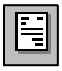
You may wish to make some changes to an existing template to improve the layout and/or reflect your particular practice. You can do this from either the **User Defined** or **Supplied** templates.

Rather than creating a template from scratch it is a better idea to modify an existing template and save the changes with a different file name.

The way to create a modified template in Medical Director is a 3-step process:

1. From the **File** menu of LetterWriter select **Modify Template**.
2. Make the changes.
3. From the **File** menu select **Save as Template** and select the template to be available for either: **All Users** or **Current User**.

Modifying the "Recall Letter – Standard" template

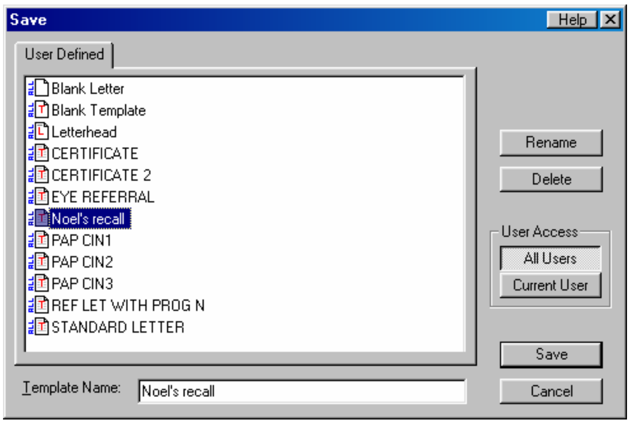


1. With a patient's record open, click on the **LetterWriter** button.

2. From the **File** menu select **Modify Template**.

3. Click on the **Supplied** tab and select **Recall Letter – Standard**.

4. Make the following modifications:
   - delete the excessive space between the date and the patient demographics
   - delete the excessive space between the patient demographics and the salutation
   - highlight <<Mail Merge:Recall Reason>> and make it bold
   - remove the comma after Yours sincerely
   - insert the cursor before <<Doctor:Name>> and press the Backspace key 3 times so it is aligned to the left margin
   - add text where necessary to make it more in the style of your practice.



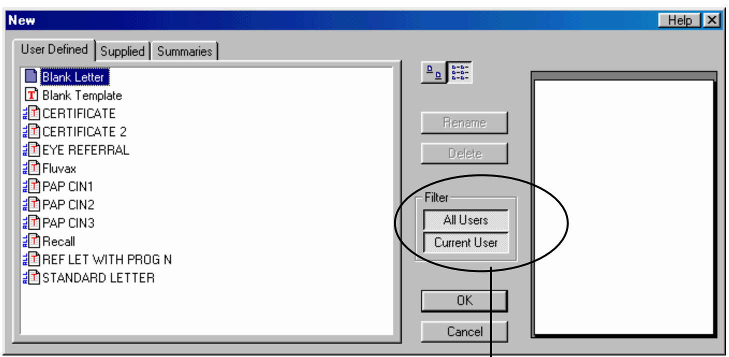
5. From the File menu select **Save as Template**.

6. When the **Save** template window appears type in an appropriate name. eg. ***Noel's recall***

7. From under **User Access** select:
   - **All Users** if you want the template to be made available for all doctors of the practice,

   OR
   - **Current User** if you want the template to be only available for the creator of the template.

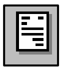
8. Click on the **Save** button.



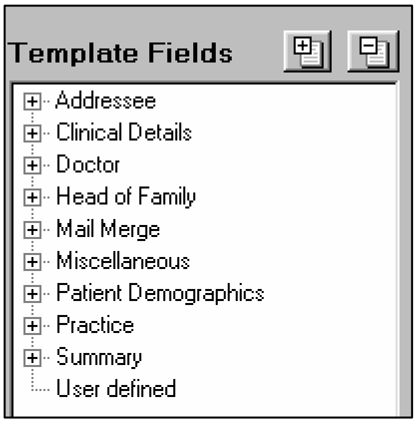
9. From the LetterWriter **File** menu select **New** and you will see that your new template is included in the list.

   In the **New** dialogue box under **Filter** you will see that you can switch between **All Users** and **Current User.**

Creating a template from scratch



1. With a patient’s record open click on the **LetterWriter** button.



2. From the **File** menu select **New** and then double-click the **Blank Template** icon. A **Template Fields** toolbar containing a list of template fields will open on the right hand side of the window. Whenever the Template Fields toolbar is present the LetterWriter is in template editing mode.

3. The toolbar can be hidden by clicking the **Hide Window** button. To show it again click on the **Show Window** button.

4. Click on the **+** sign next to **Miscellaneous** and then click on **Practice Letterhead**. Click on the **Insert Field** button.

5. Press Enter twice and then select **Date** and click on the **Insert Field** button.

6. Press Enter twice and add the following FIELDS and text – make sure there is a space after *Dear* and between each field.

7. Once the letter is complete go to the File menu and select **Save as Template**.

<<Miscellaneous:Practice Letterhead>>

<<Miscellaneous:Date>>

<<Patient Demographics:Full Name>>
<<Patient Demographics:Full Address>>

Dear << Patient Demographics:Greeting>>,

The Park Street Clinic operates a computerized Preventative Medicine Program and Patient Reminder System for follow up or review of relevant important medical issues concerning the individual, for example: general medicine, skin checks, blood pressure, cholesterol, men’s and women’s health, immunisation, depression.

Your name has presented on the recall/reminder list for:
<<Mail Merge:Recall Reason>>

You are invited to ring the surgery on <<Practice:Phone>> and make an appointment at your earliest convenience.

Should you require any further information, please do not hesitate to speak with me prior to making the appointment

Yours faithfully

Sister Patricia Marshall
Office Manager
Park Street Clinic

8. In the **Save** template window type in an appropriate file name, such as NOEL'S PHYSIO REF and then click on the **Save** button.

9. From the **File** menu of LetterWriter select **New** and then select your **Physio referral** from the list.

Setting up a men's health recall

1. Set up a template for a Men's Health recall, as illustrated below.

<<Miscellaneous:Practice Letterhead>>

<<Doctor:Name>>
<<Doctor:Qualifications>>
<<Doctor:Provider Number>>

<<Miscellaneous:Date>>

<<Patient Demographics:Title>> <<Patient Demographics:First Name>> <<Patient Demographics:Surname>>
<<Patient Demographics:Address>>
<<Patient Demographics:City>> <<Patient Demographics:Postcode>>

Dear <<Patient Demographics:Greeting>>,

It is now widely recognised that early diagnosis and/or treatment of many diseases has the potential to reduce or eliminate the impact of that disease. In some cases simple lifestyle changes can prevent the onset of disease. The Park Street Medical Centre has introduced a new service that offers men over the age of 40 a comprehensive review of their health, including lifestyle risk factors. The new service is a "Men's Health Check" that will review your current health status and assess your risk of developing illnesses. Please see enclosed flyer for more information.

The service will also be a longer than usual consultation (about 45mins), so please remember to notify the Receptionist that you will need an extended consultation on booking the appointment.

The service will cost <XX> of which you will be able to claim <XX> from Medicare.

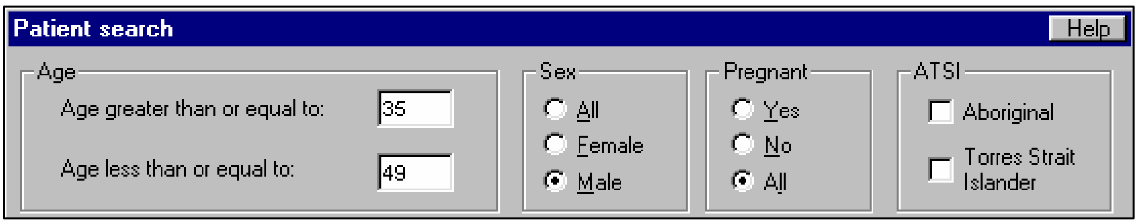
After completing the assessment we will have a clearer understanding of your future health needs and will be able to plan appropriately.

Yours sincerely,

Dr Practitioner

2. With no patient record open go to the **Search** menu and select **Databases**.

3. Select age greater than 35 and less or equal to 49. For sex click on Male. Then click on the Search button.



The next time you would choose the 50-75 male age group.

Setting up a reminder for a Health Assessment for the over 75s

1. Set up a template for a Health Assessment letter, as illustrated below. Save it as **75+ Health Assessment**.

<<Miscellaneous:Practice Letterhead>>

<<Doctor:Name>>
<<Doctor:Qualifications>>
<<Doctor:Provider Number>>

<<Miscellaneous:Date>>

<<Patient Demographics:Title>> <<Patient Demographics:First Name>> <<Patient Demographics:Surname>>
<<Patient Demographics:Address>>
<<Patient Demographics:City>> <<Patient Demographics:Postcode>>

Dear <<Patient Demographics:Greeting>>,

You may have read in the newspaper that as part of the Federal Governments initiatives to improve the health care available to older Australians, the Medical Benefits Schedule has introduced new Item Numbers for Health Assessments for patients over 75 years of age.

As your GP, I would like to offer you this service. There is no cost as it is reimbursed by Medicare. You will simply be asked to sign a payment voucher following the completion of the assessment.

A Health Assessment is really a detailed look at such things as your general health, including sight, hearing, diet, sleep and any medication you might be taking. It also includes any help you may be receiving at home (eg home help, meals on wheels) your immunisation status; and, if you have any problems with shopping, dressing or bathing etc.

The Health Assessment is not compulsory but I believe that it may help us identify any health needs you may have. An early intervention will allow you to enjoy better health for longer.

I would encourage you for these reasons to contact the surgery to make an appointment for such an assessment.

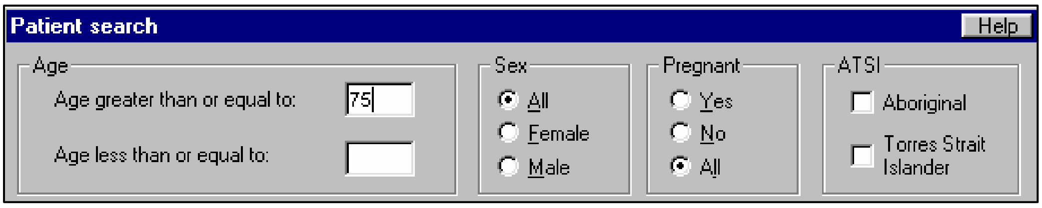
If you have any concerns about this letter please contact me at the surgery to discuss them

Yours sincerely

Dr Practitioner

2. With no patient record open go to the **Search** menu and select **Databases**

3. Select age greater than 75 for all patients. Then click on the Search button.



4. When the list appears click on the Mail Merge button at the bottom of the screen.

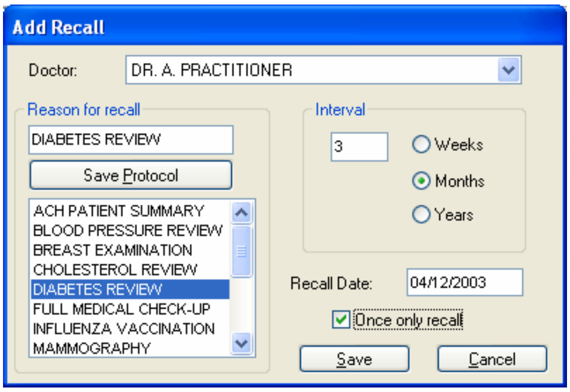
5. Select the 75+ Health Assessment template.

Recall System – One Page Cheatsheet

1

Adding a recall

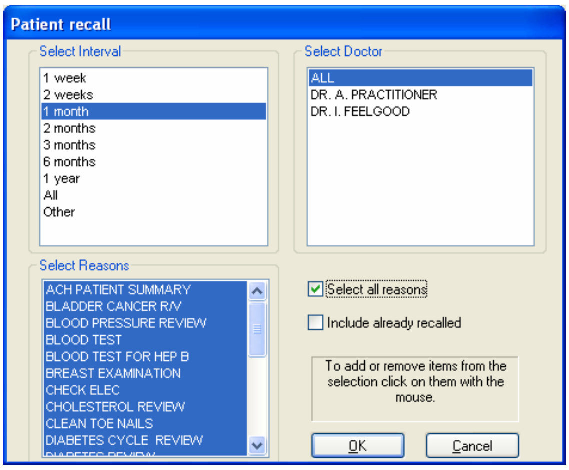
1. In patient record **Clinical/Recall** (or Control +R).
2. Click on **Add**.
3. Select **Reason for recall** from list, or type in recall reason.
4. Select **Interval.**
5. Click in box next to **Once only recall**.
6. Click on **Save** and then **Close**.



2

Creating recall list and contacting patients (eg once per month)

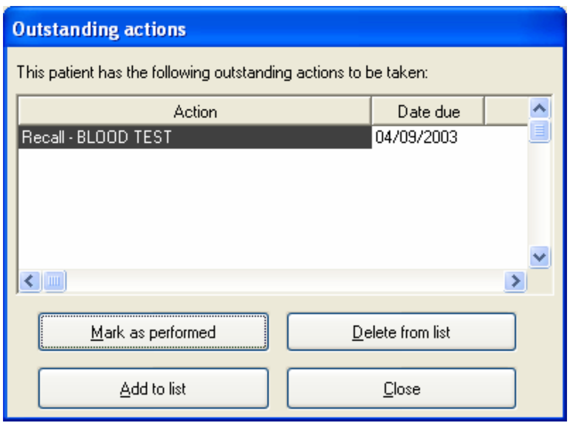
1. No patient record open – **Search/Recalls**.
2. Select **Interval – 1 month**
Select Doctor – ALL
Select all reasons
3. Click **OK**.
4. Highlight and press **Delete** key to remove any unwanted recalls.
5. **Print** Recall list (if necessary) to check validity with doctors. Click on **Cancel** (Not UPDATE or REMOVE)
6. Click on **Save** to save list. Click on **Save** again. Click on **Cancel** (Not UPDATE or REMOVE).
7. Click on **Mailmerge**.
8. Select **Recall letter – standard** – this will print all the letters.
9. Click on **Update** (or Remove), then **Close**.
10. Post out letters and make appointments when patient rings.



3

Patient returns to see doctor

1. Open patient record.
2. When **Outstanding Actions** appears – click on **Mark as performed**.
3. Continue with consultation.



4

Check outstanding actions (weekly)

1. No patient record open – **File menu/Outstanding actions**.
2. Click on **Print** to create list of patients.
3. Check the list
- contact patient if necessary (phone or letter)
- click on **Mark** if action has been performed
- click on **Delete** if no longer valid
4. Close

Medical Director – Recall Flowchart