

Recalls & Reminders using MedicalDirector Clinical

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Our Learning Objectives:

1. Develop an understanding of systematic preventive health management/screening.
2. Design an effective recall and reminder system.
3. Use actions for preventive health activities.
4. Add, view and modify patient recalls and reminders.
5. Generate patient recall and reminder lists.

1. Systematic preventive health management



Practices need:

- Clear system
- Goals/Plan
- Defined roles
- Communication
- Training

Systematic preventive health management

Adopting a **systematic** approach to health promotion and preventive care can include:

- establishing a recall and reminder system
- conducting patient prevention surveys
- maintaining a disease register
- maintaining a directory of local services that offer programs to help patients modify their lifestyle.



[RACGP 5th standards](#)

General Practice Standards



RACGP 5th Standards Criterion

C4.1 - Health promotion and preventive care

“Some information may also be transferred to national state-based registers (eg. cervical screening etc)

Remind patients when they need to have another screening
(do not rely on patients receiving reminders from these registers).“

[Read RACGP 5th standards](#)

Searches, screening, recalls & reminders



```
graph TD; A[Identify at risk groups/patients] --> B[Flag for follow up / recall]; B --> C[Screen/test or refer patient]; C --> D[Review result & action (if necessary)]; D --> E[Recall patient as required]; E --> A;
```

Identify at risk groups/patients

Flag for follow up / recall

Screen/test or refer patient

Review result & action
(if necessary)

Recall patient as required

2. Design a recall and reminder system

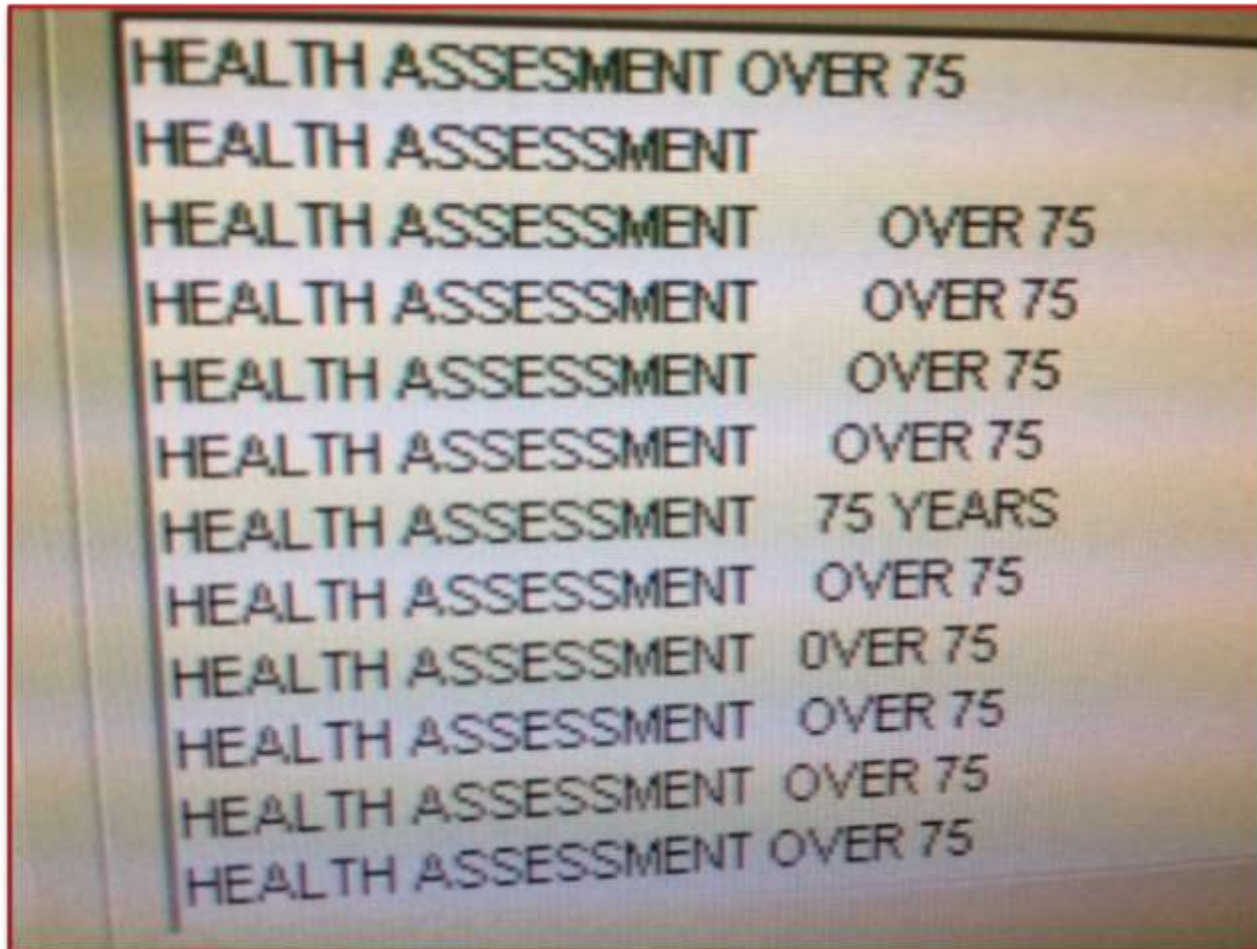


Actions, Recalls and Reminders

- **REMINDERS** eg. immunisation, skin check, routine Cervical Screening Test (CST)
- **RECALLS** (ie clinically significant/medico-legal) eg previous melanoma, inconclusive CST

- ✓ Define *your* reminder list
- ✓ Label your reminders so patients don't stress if they receive a sms or letter with the reason
- ✓ Keep your list tidy

This is what can happen without a 'system':



Save time, money & minimize risk

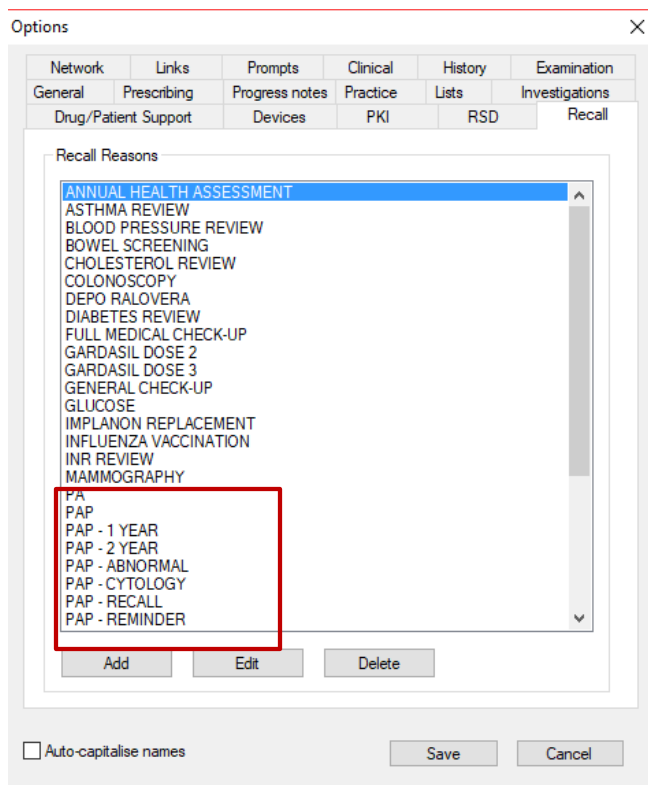
COIL REMOVAL
COLON
COLONO
COLONOSC
COLONOSCO
COLONOSCOPI
COLONOSCOPE
COLONOSCOPY
COLONOSCOPY AND ENDOSCOPY
COLONOSCOPY REPORT AND REVIEW
COLONOSCOPY
COLPOSCOPY

With a list like this how do you identify true recalls ie. Clinically significant/probability of harm/must follow-up/medico-legal/keep the doctor informed & document every single contact attempt?

Set up

Tools > Options

Label so patients don't stress if they receive a sms or letter with the reason.



New Recall/Reminder labels required

Add Recall: Penny ANDERSON

Assigned To:
Dr A Practitioner

Recall Reason

PAP/CERVICAL TEST

GENERAL CHECK-UP
GLUCOSE
IMPLANON REPLACEMENT
INFLUENZA VACCINATION
INR REVIEW
MAMMOGRAPHY
PAP SMEAR
PAP/CERVICAL TEST
PNEUMONIA VACCINATION
PROSTATE REVIEW
SKIN CHECK
TETANUS VACCINATION
WEIGHT REVIEW

☐ Restrict by age and gender

Add Reason Edit Reason Delete Reason

Due Date:
1/12/2022

Recall Options

☐ Return urgently
☐ Once only Recall

Recall Interval

5 Weeks
Months
Years

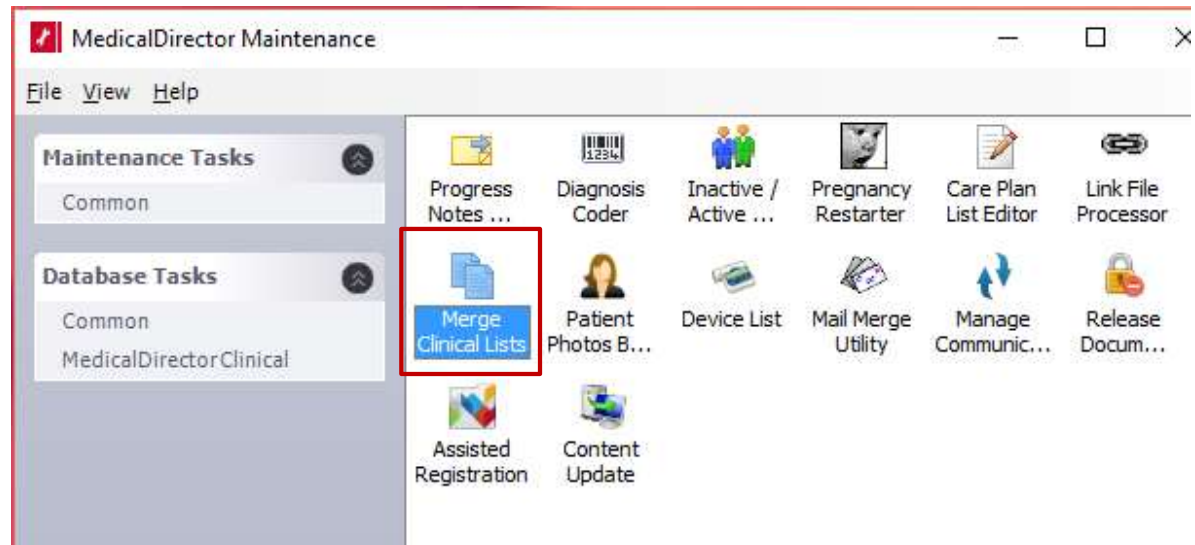
Save
Cancel



Time for a Clean Up?

PA
PAP
PAP - 1 YEAR
PAP - 2 YEAR
PAP - ABNORMAL
PAP - CYTOLOGY
PAP - RECALL
PAP - REMINDER
PAP & BREAST CHECK
PAP SMEAR
PAP SMEAR TEST
PAP TEST
PAP TEST FOLLOW UP WITH DR JACKSON
PAP TEST REMINDER
PAPP

Clean up



Clean up: merge lists if duplicated



Merge Clinical Lists

Show Clinical List for:
Recall List

Items

- GENERAL CHECKUP
- IMMUNISATION
- IMMUNISATION - 18 MONTH
- IMMUNISATION - 2 YEAR
- IMMUNISATION - 4 MONTH
- IMMUNISATION - 4 YEAR
- IMMUNISATION - 6 MONTH
- INFLUENZA VACCINATION
- INR REVIEW
- PAP
- PAP - REMINDER
- PAP SMEAR
- PAP SMEAR TEST
- PAP TEST
- POST NATAL REVIEW
- REVIEW AFTER ABNORMAL RESULT
- SKIN CHECK
- URGENT TEST RESULT

Replace:
PAP

With:
PAP TEST

Status

Change OK

Merge Search Lists

Are you sure you want to replace PAP SMEAR with PAP TEST?

Yes No

Actions, Reminders & Recalls

- **RECALLS** (ie clinically significant/medico-legal) eg previous melanoma, inconclusive
- **REMINDERS** eg. immunisation, skin check, routine Cervical Screening Test (CST)

For 'reminders' that are only for the clinician, consider:

'ACTIONS' eg. Discuss screening, discuss smoking

3. Use Actions for preventive health activities



A reminder for the clinician when the patient next presents. eg. discuss smoking, repeat BP etc

If follow-up is required use 'Recall' button instead. (If clinically significant there is an extra tickbox to help us separate from the 'reminders').

Actions

[illegible]

Outstanding action prompts appear on opening the patient record and can be tracked from the main screen (Clinical > Outstanding Actions).

4. Add, view and modify patient recalls & reminders

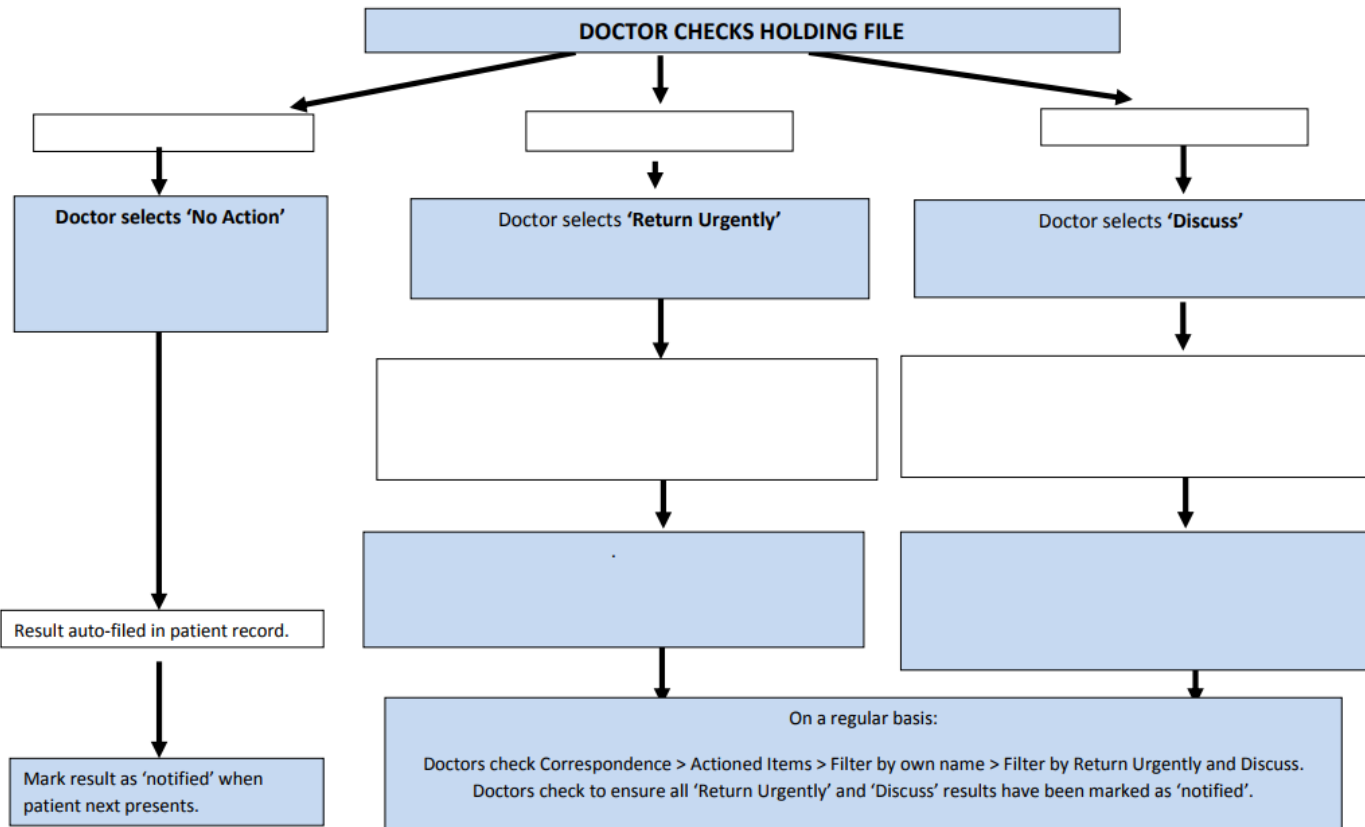
Add from:

- patient record
- immunisations
- review screen
- Holding File



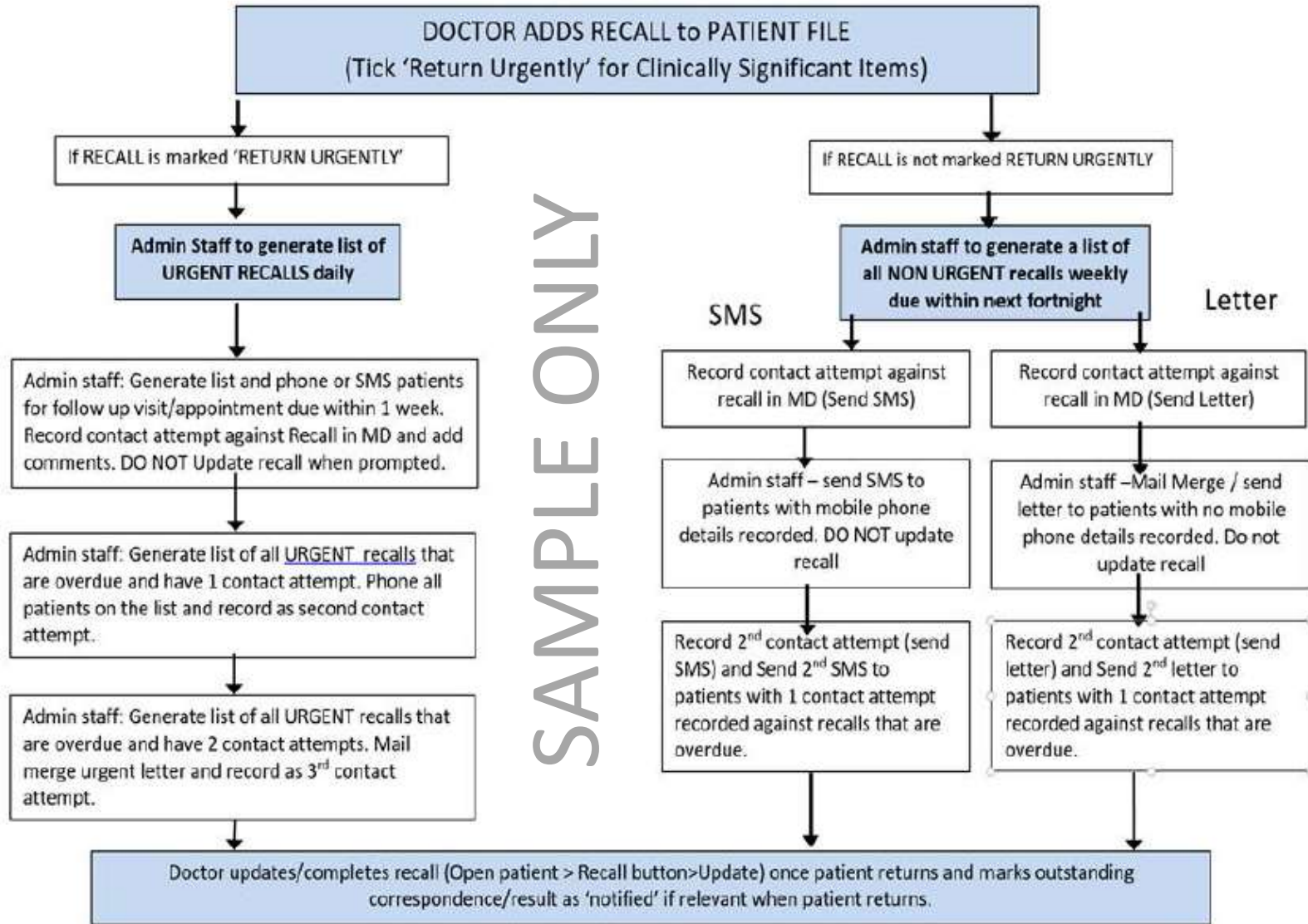
What's your Correspondence Management 'system'?

MEDICALDIRECTOR - SAMPLE CORRESPONDENCE MANAGEMENT PROTOCOL



CREATE YOUR OWN

MEDICALDIRECTOR – RECALL MANAGEMENT PROTOCOL – SAMPLE 2



5. Generate Recall and Reminder Lists

Recall Search Criteria

Recall Reasons: 1 of 20 selected

☐ Show only reasons from active recalls

☐ All Reasons

- GENERAL CHECK-UP
- GENERAL CHECKUP
- IMMUNISATION
- IMMUNISATION - 18 MONTH
- IMMUNISATION - 2 YEAR
- IMMUNISATION - 4 MONTH
- IMMUNISATION - 4 YEAR
- IMMUNISATION - 6 MONTH
- INFLUENZA VACCINATION
- INR REVIEW
- PAP SMEAR**
- SKIN CHECK
- URGENT TEST RESULT

Assigned To: All Users

☐ Show only users with active recalls

☒ All Users ☒ Show 'Unknown' User

Name	Status
Unknown	
Dr A Practitioner	Active
Registered Nurse	Active

Status

☐ Include deleted recalls ☐ Include completed recalls

Patient Contact

☐ Attempted to contact patient at least

☐ Only show patients that have attended in response to a recall

Date Range

Due within 2 weeks Start: 3/01/2014 End: 4/12/2017

Saved Searches

Default Search	Search Name
<input checked="" type="checkbox"/>	Diabetes Reviews
<input type="checkbox"/>	Immunisations
<input type="checkbox"/>	Pap Smear

Load Save Rename Delete

Search Cancel

Display Actions Pane (Audit Trail)

Search Recalls

Select NoneSearchRefreshAdd RecallOpen PatientExportMail MergePrint ListUpdateSend SMSClear FiltersReset Window Settings

SurnameFirst NameRecall ReasonDue DatePreferred ContactMobile PhoneAddressAssigned ToPriority

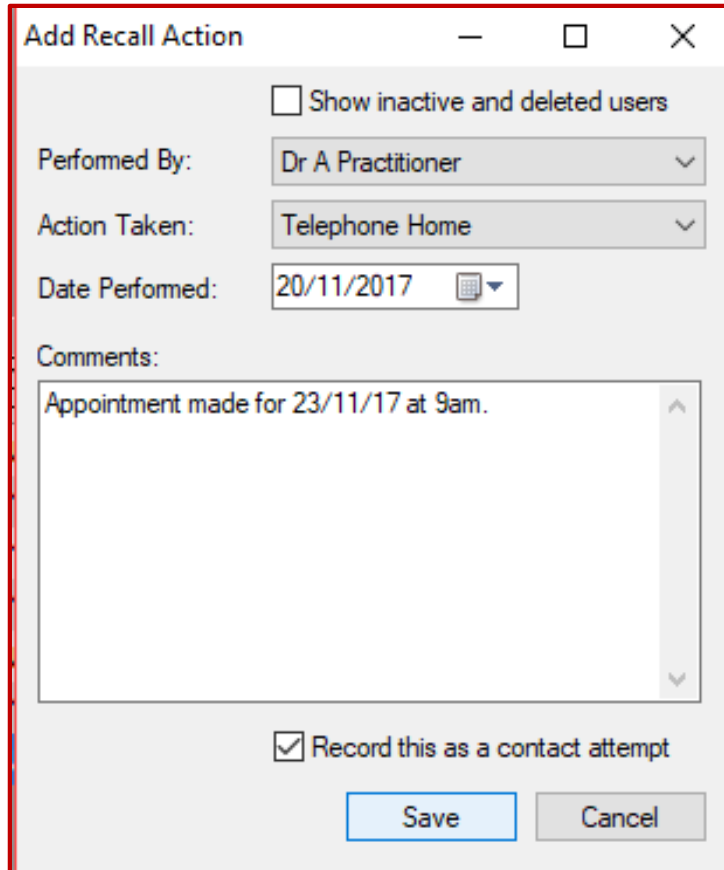
ANDREWSHeatherPAP SMEAR3/01/2014SMS0424583333234 George Stree...Dr A Practitioner

Action Taken	Date Performed	Performed By	Contact Attempt	Comments	Date Deleted	Deleted By
Audit	3/01/2012	Dr A Practitioner	No	Created after updating previous recall.		
Telephone Mobile	31/03/2016	Dr A Practitioner	Yes	Made appointment for 1/4/16 at 9am		
Send Letter	27/04/2016	Dr A Practitioner	Yes	Registered letter		
Consultation	27/04/2016	Dr A Practitioner	Yes	Regular post		
Audit	4/07/2016	Dr A Practitioner	No	Letter printed.		
Send Letter	10/05/2017	Dr A Practitioner	Yes	Registered letter		
Telephone Home	10/05/2017	Dr A Practitioner	No	Rang patient on home phone - disconnected		

PrintAddEditDeleteShow DeletedHide Actions PaneShow Details PanelClose

Currently Loaded Search: New recall searchRecall Count: 1Unique Patient Count: 1

Follow Up Recalls & Reminders

A screenshot of a software dialog box titled "Add Recall Action". The dialog has a standard Windows-style title bar with minimize, maximize, and close buttons. Inside, there is a checkbox labeled "Show inactive and deleted users" which is currently unchecked. Below this are three fields: "Performed By:" with a dropdown menu showing "Dr A Practitioner", "Action Taken:" with a dropdown menu showing "Telephone Home", and "Date Performed:" with a text field showing "20/11/2017" and a calendar icon. Below these is a "Comments:" section with a large text area containing the text "Appointment made for 23/11/17 at 9am.". At the bottom, there is a checkbox labeled "Record this as a contact attempt" which is checked. At the very bottom are two buttons: "Save" and "Cancel".

Add Recall Action

☐ Show inactive and deleted users

Performed By: Dr A Practitioner

Action Taken: Telephone Home

Date Performed: 20/11/2017

Comments:

Appointment made for 23/11/17 at 9am.

☒ Record this as a contact attempt

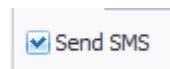
Save Cancel

- Track Contact Attempts
- Review Audit Log
- Remove recall once complete

Consent for SMS

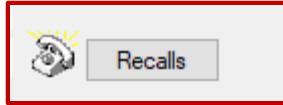
Search Recalls									
Select All Search Refresh Add Recall Open Patient Export Mail Merge Print List Update Send SMS Clear Filters Reset Window Settings									
Surname	First Name	Recall Reason	Due Date	Preferred Contact	Mobile Phone	Address	Assigned To	Priority	
ANDERSON	David	IMMUNISATION	1/02/2018	SMS	0424583333	61 Wallace Stree...	Dr A Practitioner		
ANDERSON	David	BOWEL SCREENING	11/06/2017	SMS	0424583333	61 Wallace Stree...	Dr A Practitioner		
ANDREWS	Heather	PAP SMEAR	3/01/2014	SMS	0424583333	234 George Stree...	Dr A Practitioner		
ANDREWS	Heather	INFLUENZA VACCINATION	18/02/2014	SMS	0424583333	234 George Stree...	Dr A Practitioner		
ANDREWS	Julie	PAP SMEAR	31/03/2018	Letter	0424 578 383	5 Jefferson St, Bu...	Dr A Practitioner		
ANDREWS	Julie	SKIN CHECK	7/04/2016	Letter	0424 578 383	5 Jefferson St, Bu...	Dr A Practitioner	Urgent	
ANDREWS	Julie	FULL MEDICAL CHECK-UP	1/02/2018	Letter	0424 578 383	5 Jefferson St, Bu...	Dr A Practitioner	Urgent	
ANDREWS	Melissa	ASTHMA REVIEW	3/02/2017	Letter	0424583333	2 Kennedy Road,...	Dr A Practitioner		
ANDREWS	Melissa	IMMUNISATION	18/10/2017	Letter	0424583333	2 Kennedy Road	Dr A Practitioner		
Action Taken	Date Performed	Performed By	Contact Attempt	Comments		Date Deleted	Deleted By		
Audit	1/02/2017	Dr A Practitioner	No	New recall: IMMUNISATION, 01/02/2018					

- ✓ Bulk select and bulk send SMS.
- ✓ Opt-in consent now in PracSoft
- ✓ Add Preferred Contact in Patient Details in MedicalDirector Clinical
- ✓ Tickbox 'Do not send SMS' if patient consent has not been given.



Preferred Contact: SMS ☐ Do not send SMS

When patient returns: delete recall



Recall Items

Range: All End Date: 31/12/9998 ☐ Include completed and deleted recalls

Add Edit Update Delete Print List Progress Notes

Recall Reason	Due Date	Date Added	Last Action Date	Last Action By	Last Action	Once Only	Priority	Attended	Date
PAP SMEAR	3/01/2014	3/01/2012 2:41 ...	10/05/2017	Dr A Practitioner	Telephone Home				
INFLUENZA VACCINATION	18/02/2014	18/02/2013 11:2...	4/07/2016	Dr A Practitioner	Audit				

Audit trail of contact

Action Taken	Date Performed	Performed By	Contact Attempt	Comments	Date Deleted	Deleted By
Audit	3/01/2012	Dr A Practitioner	No	Created after updating previous recall.		
Telephone Mobile	31/03/2016	Dr A Practitioner	Yes	Made appointment for 1/4/16 at 9am		
Send Letter	27/04/2016	Dr A Practitioner	Yes	Registered letter		
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Send Letter	10/05/2017	Dr A Practitioner	Yes	Registered letter		
Telephone Home	10/05/2017	Dr A Practitioner	No	Rang patient on home phone - disconnected		

Add Edit Delete Show Deleted Print Close

RECALLS

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.



Results (Holding File Follow-up) 'System'

Pathology Results

Radiology Results

Specialist Letters

Discharge Summaries

Scanned documents

Recalls from the Holding File

Patient	Subject	Description	Recipient/Doctor	Sender/Provider	Location	Type
ANDREWS, Heather	FBI	HELLO COMPUTER	SDS PATHOLOGY	Result	Pathology	
HAWKES, Janice	HPV DNA	HELLO COMPUTER DEP.	SDS PATHOLOGY	Result	Pathology	
HAWKES, Janice	HPV DNA	HELLO COMPUTER DEP.	SDS PATHOLOGY	Result	Pathology	
ANDREWS, Heather	INR	HELLO COMPUTER DEP.	SDS PATHOLOGY	Result	Pathology	
ANDREWS, Heather	INR	HELLO COMPUTER DEP.	SDS PATHOLOGY	Result	Pathology	
ANDERSON, David	Sleep GP referral (NID)	Dr A Poddiner		Document	Report	

Subject:	HPV DNA	Complete
Lab Reference:	04-400-001-0	
Requested:	23/07/2004	
Performed:	23/07/2004	
Sender/Provider:	SDS PATHOLOGY	

using the Digene Hybrid Capture II
V types 16, 18, 31, 33, 35, 39, 45,
distinguish between the viral types
a supplementary finding, immediate

Assigned To:
Dr A Poddiner

Recall Reason:
ANNUAL HEALTH ASSESSMENT
ASTHMA REVIEW
BLOOD PRESSURE REVIEW
BOWEL SCREENING
CERVICAL SCREENING TEST
CHOLESTEROL REVIEW
COLONOSCOPY
DEPO RALOVERA
DIABETES REVIEW
FULL MEDICAL CHECK-UP
GARDASIL DOSE 2
GARDASIL DOSE 3
GENERAL CHECK-UP

Due Date:
25/11/2017

Recall Options:
☐ Return urgently
☒ Once only Recall

Recall Interval:
☒ Weeks
☐ Months
☐ Years

☐ Restrict by age and gender

Add Recall Edit Recall Delete Recall

Save Cancel

Print | Action | No Action | Discuss | Return Urgently | **Add Recall** | Edit Patient | Open Patient | View Signature | Audit History | Close



Need to enter screening results too



Can enter from Holding File or Patient File >  Cervical Screening

Inclusion of new risk categories:

- Low Risk
- Intermediate Risk
- Higher Risk
- Unsatisfactory

Record Cervical Screening Result

Donna Andrews
DOB: 12/12/1980 Record No:

Screening Result

Date: 25/11/2017 Result: Negative

☐ Endocervical cells present?

Comment:

[View AMBS 2004 Comparison Table](#)

Negative
Low Risk
Intermediate Risk
Higher Risk
Unsatisfactory
Atrophic
Possible low-grade squamous intraepithelial lesion
Low-grade squamous intraepithelial lesion (LSIL)
Possible high-grade squamous intraepithelial lesion
High-grade squamous intraepithelial lesion (HSIL)
Squamous cell carcinoma (SCC)
Atypical endocervical cells of undetermined significance
Atypical glandular cells of undetermined significance
Possible high-grade glandular lesion
Endocervical adenocarcinoma in situ (AIS)
Adenocarcinoma
Adenocarcinoma - endocervical
Adenocarcinoma - endometrial
Adenocarcinoma - extrauterine
Low Grade abnormality
High Grade abnormality
Inconclusive
Inflammatory
Atypia
C.I.N. 1
C.I.N. 2
C.I.N. 3
Invasive Ca.

NB. The previous risk categories remain on this list to provide facility for Clinicians to record current and historical results.



Proactive preventive health searches



NB. As at Nov 2017 you cannot currently search for recalls that may be in 'inactive' patient records. Do not inactivate patient records if they are still on your recall list.

Under screened? Never screened? Hard to reach groups?
Good, systematic preventive health care.

Further Information



- **RACGP – Putting Prevention into Practice (Green Book)**
<http://www.racgp.org.au/your-practice/guidelines/greenbook/>
- **AMA- Recall systems and patient consent -** <https://ama.com.au/position-statement/patient-follow-recall-and-reminder-systems-2013>
- **Avant – The Dos and Don'ts of patient sms** <http://www.avant.org.au/news/20160419-dos-and-donts-of-patient-sms-communication/>
- **Train IT Medical – Practice Management free resources –**
<http://trainitmedical.com.au/practice-management-free-resources>

Further Information



[Train IT Medical Free Resources – Cervical Screening Program](#)

[National Cervical Screening Program - Dept of Health - FAQs](#)

[Cervical Screening Changes FAQ - Video - Dr Sally Sweeney Hunter New England Central Coast PHN \(HNECCPHN\)](#)

[NPS Information & FAQs](#)

[NPS free eLearning](#)

[Cancer Council Australia Cancer Guidelines Wiki](#)

['Cancer Council study confirms starting cervical cancer screening at age 25 is safe'](#)

[Cancer Institute NSW 'Information for Health Professionals'](#)

[Untold Stories - Cervical Cancer Screening - Audio-visual stories](#)

(Family Planning NSW). Spoken in Arabic, Assyrian, Dari, French, Hindi, Karen, Khmer, Mandarin, Nepalese & Vietnamese.

['Changes to cervical screening will benefit Australian women' RACGP media release](#)

[NCPHN Cervical Screening Workshop Presenter Slides](#)

Thank you for inviting me

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Keep in touch! With best wishes, Katrina Otto