

# How do I use the Best Practice Reminders?

This FAQ is intended to answer the common questions about configuring and using Reminders functionality of Best Practice Software.

**'Reminders'** in Best Practice are notations that can be added to a patient's record to allow the practice to 'remind' the patient to do something at a certain time. The system will allow reminder letters to be generated for the patient.

These should not be confused with **'Actions'** which are notations to remind a staff member to perform an action. Refer to the separate FAQ document '*BP\_FAQ-Actions.pdf*'

Best Practice software also provides a **'To do list'** which is a handy personal reminder system that will pop up a message when logging in, logging out or closing Best Practice. Refer to the separate FAQ document '*BP\_FAQ-To Do List.pdf*'

Below is a summary of the steps to set up Reminders:-

- Configuration of Reminders
- Add / Edit Reminders
- Sending Reminders
- Reprinting / Resending Reminders
- Creating / Editing Reminder Template Letters

## **Configuration of Reminders**

### **Creating new Reminder Reasons**

Best Practice is provided with a standard set of '**Reminder Reasons'**. This feature allows you to create or maintain these '**Reminder reasons'**.

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12mth Immunisation	Edit
2mth Immunisation	
4-5y Immunisation	Remove
4mth Immunisation	
6mth Immunisation	
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• To setup the reminders, select 'Setup'

> 'Configuration' from the main Best Practice screen.

• Scroll down on the left hand side to find the '**Reminders**' icon.

• The top section of the screen shows the "**Reminder Reason'** list- this is the full list of reminder reasons available when reminders are being created within the patient record.

- You can choose to 'Add', 'Edit' or 'Remove' reminder reasons as required.
- Each reminder reason will have a 'Reason', 'Default Interval' and 'Interval type' (i.e. Wks, Mths, Years). This interval is used when creating a reminder to calculate the date to be set for that reminder.

🤾 Reminder rea	son 📃
Reason:	12mth Immunisation
Default interval:	🛛 🔘 Weeks
	Months
	Years
	Save Cancel



- The '**Clean up**' button allows you to view all reminder reasons currently setup in the system and allocate them to a more appropriate reminder reason.
- This process is handy for when you wish to rename bulk amounts of reminders that were incorrectly worded.

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Reminder reason	Add
12mth Immunisation	Edit
2mth Immunisation	
4-5y Immunisation	Remove
4mth Immunisation	
6mth Immunisation	Clean up
A 11	
Allow free text reminders.	

**Tip:** Ticking the "allow free text reminders" will allow your staff to type freely into reminders when making them. Please note that free text reminders are <u>not</u> added to the list of reminder reasons. For data consistency it is recommended to add new reminder reasons via the method described above rather than allowing free text reminders.

# Fields to be printed on Reminder list

This function will allow you to configure the fields and width of data to be displayed on the '**Clinical'** > '**Reminder'** screen.

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**Send as** – to change the default "send as" option on the 'Clinical' > 'Reminders' > 'Sent reminders' screen, select the desired method of sending from the drop down list. The default selection is **Mail** merge.

'Mark as sent' - ticking the "mark as sent" option here will default the checkbox on the 'Clinical' >

'Reminders' > 'Sent reminders' screen to be ticked.

**'Default reminder list interval'** – this option will change the default date range when viewing reminders via the **'Clinical'** > **'Reminders'** screen. By default, it will be set to **1 week**.

**'Display Actions/Reminders less than'** – this option allows you to alter how far back in the past actions/reminders are displayed for. By default, the time period is set to show reminders less than **6 months old**. You can change it to any monthly period that you wish, but keep in mind that if you wanted to show the past 2 years of reminders (for example), you will need to put in **24 months**.

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Dates revew     Aves     Aves	Reason	User
and: 11/03/2012	Care plan     Dabetes review     Dabetes review     Provax     Hexpatric B Immunisation     Immunisation     Immunisation     Imfuenza Vaccination     Pap Smear     Posumevrax	Select all Deselect all Due between: 4/03/2012
		Include overdue reminders.
include overdue reminders.		Include inactive satients

# Add / Edit Reminders

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Open the relevant patient's record.

You will notice in the middle section of the screen a section called **'Actions/Reminders'**. This will show any Actions / Reminders that have been created for the patient that are overdue or due within the next month. Note: refer to the section on Configuration of Reminders for details on how to change the duration that overdue reminders appear for.

🤾 Reminder	;				×
The following re	minders are in the database	for this patient :		Show sent reminders	•
Due	Reason				
05/03/2012	Diabetes review				
05/03/2012	Full medical				
		New	Edit	Remove	Close

Add Reminder: - Click on the 'Reminders' button in the middle right hand section of the patients files (next to the actions button).

The **'Reminders'** screen will appear showing all reminders that are currently outstanding for this patient. 'Blue' denotes current or future and 'Red' denotes overdue.

A Remind

To 'Add' a reminder: - click on the New' button. The 'Reminder' screen will appear.

**To see:** select the user to be seen. It will default to the logged in user but can be changed to the appropriate user.

Reason	Default interval			4					_	
12mth Immunisation	6 months	1		Ľ.			irch 2			'
2nth Immunisation	2 months			Mon	Tue	Wed	Thu	Fri	Sat	
4-5y Immunisation	3 years			5	6		8	9	10	4
Anth Immunisation	2 months			12	13	14	15	16	17	18
South Immunipation	2 months			19	20	21	22	23	24	25
Asthma review	1 year			26	27	28	29	30	31	1
BP Check	1 year			2	3	4	5	6	7	8
Breast check	1 year						Today	4/03	2012	
Care plan	1 year									
Cholesterol check	1 year		E Au	tomatic	ally up	idate th	his rem	inder w	hen s	ent to pa
Colonoscopy	1 year	*	Upda	e inter-	rat:		7 e	Week	(5)	
her manon:								Month		

**Reminder reason:** select the reminder reason to generate the reminder for.

As soon as the reminder reason is selected, the system will fill in the **'Remind in'** and **'Reminder date'** fields and move the calendar to this date. You will notice that each Reminder Reason has a 'default interval'. This interval is added to today's date to calculate the reminder due date. You can change the date as required to any date in the future.

**Tip:** You can also add a reminder from the '**Clinical'** > '**Reminders'** screen by going to the file menu and select "**Add Reminder**". You can open this Reminders screen by pressing the mail icon located on the main screen of Best Practice.

'Automatically update this reminder when sent to patient' – if this box is ticked, when a reminder is sent to a patient via the 'Clinical' > 'Reminders' screen, a new reminder will be created on the patient record for the next due date. This will save users from having to enter the next reminder into the system.

Press the **'Save'** button to create the reminder. It will now appear in the reminders section. If the date or reason was incorrect, you can select the reminder, and press the edit button to adjust any information that was incorrectly put in. **Sending Reminders** 

When processing reminders, you have the choice of Printing Letters, Printing a list, Printing Labels or exporting the patient list to use in an external application.

**Tip:** If you are printing reminder letters, you should ensure that you have the relevant template already created in the system. Best Practice supply a generic 'Reminder letter' template which would suit most circumstances however you may wish to customise this for your site.



Step 1:- Generate a list of patients who require Reminders sent to them.

Step 2:- Print a reminder letter, list, labels, or export the list as required

# Step 1

Select *Clinical > Reminders* or press the mail icon located on the main screen of Best Practice. The Reminders screen will appear.

Reminders File View Help				
	end reminders			
Nama Action	Due Dotor Addess  Select patients for reminders  Select measures  Care plan  Care plan  Dudres rytwe  Frid medical  House Select all  Select all  Deselect all	D D E	Age Medicale No.	Medican equiy File No. 4

Select patients

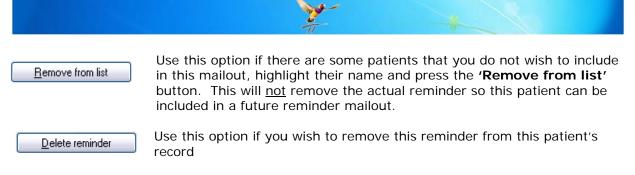
- click on the 'Select Patients' button to display the 'Select patients for reminders' screen.

**Note:** This function will display <u>only</u> those reminders that have <u>not</u> previously been sent. If the reminder is marked as 'sent' on the patient record the patient will not be displayed on this screen. If you need to re-print a reminder letter for a reminder that has already been marked as sent refer to the section on 'Resent Batch' or 'View Sent Reminders' below.

- Tick the reminder reasons to be displayed
- Select the users/doctors to display the reminders for
- Select the range of dates to display the reminders for
- Tick 'Include overdue reminders' if there have been reminders that might have been missed in earlier mail outs
- Tick 'Include inactive patients' if you wish to include patients who have been marked as inactive

Click '**Ok**' to generate and the list of patients who have reminders due for the criteria selected will be displayed.

Reminders								-		*
File View Help										
8a 16										
Select patients F	Remove from list Delete reminder	Send reminders	View appointments							
Sort by	Name 2 records	0								
Name	Action	Due	Doctor	Address	D.O.B.	Age	Medicare No.	Medicare expiry	File No.	-
Abbolt, Alan John	Diabetes review	05/03/2012	Dr. F. Findacure	12 Jogger St, Albany Creek. 4035	30/06/1945	66 yrs	4133180467 - 1	31/12/2007	101	
Abbott, Alan John	Fullmedcal	05/03/2112	Dr. F. Findacure	12 Jogget St. Albery Creek. 4035	30/06/1345	66 yes	4133180467 - 1	31/12/2007	101	



Use this option to generate the reminder letters, list, etc.

When the 'Send reminders' button is pressed, the 'Send reminders' screen will be displayed.

There are four functions to choose from: -

Send reminders

- Selecting Mail Merge will print out a reminder letter for each patient on the list using the selected reminder template (see details below)
- Selecting **Printed List** will print the list of patients displayed on the screen.
- Selecting **Labels** will print the list of patients in label form to place on envelopes.
- Selecting **Save as file** will allow you to save the list of patients in either an XML, CSV or Text format, which you can choose to store or import elsewhere.

🚶 Send reminders					
Use:					
<ul> <li>Mail merge</li> </ul>					
Printed list					
Cabels					
Save as file					
☑ Mark as sent					
Save a copy in the patient's chart					
Add a new reminder for those marked for auto-update					
Send Cancel					

**Tip:** The default selection will be determined by the default set in the *Setup > Configuration >* **Reminders** as mentioned above in 'Setting up Reminders'.

You will also see 3 tick boxes. All of those tick boxes are self-explanatory and will take effect when you press the '**Send'** button after selecting the sending option.

*Mark as sent* – the reminder on the patient's record will be marked as 'Sent on "date" ' showing the date sent.

Туре	Due	Reason	-
Reminder sent	05/03/2012	Diabetes review Sent on 04/03/2012.	=
Reminder sent	05/03/2012	Full medical Sent on 04/03/2012.	_
Preventive health	04/03/2012	Influenza vaccination should be considered!	
Preventive health	04/03/2012	Vaccination against pneumococcus should be considered!	-
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### Save a copy into the patient's chart

- will place a copy of the reminder letter into the 'Correspondence Out' section of the patients record.

### Add a new reminder for those marked for auto-update

- will add a new reminder to the patients' records for the next reminder date where the reminder is set to auto-update.

### Mail Merge

### **Tip:** <u>Perform a Test Print</u>

If this is the first time you have printed reminder letters or you are using a new reminder template, we recommend that you perform a test print for only 2 or 3 patients to ensure that the letter prints as expected to save you from possibly wasting paper. Use the 'Remove from list' button discussed above to move all but 2 or 3 patient names and then follow the Mail Merge process above. DO NOT Tick the options for 'Mark as 'Sent' or 'Add a new reminder for those marked for auto-update' when running the test prints.



When the Mail Merge button is pressed, the **'Word Processor Templates'** screen will be displayed.

Select the template letter to be used.

If you wish a copy of the letter to be stored in the patient's record, tick the box 'Save a copy in each patient's record'.

Click 'Open' to begin printing the letters.

## Printed List / Labels

🚶 Word Processor templat Al Custom Suppled Include all states Template name Sector of Sectors Bowel Cancer Screening Program Care Plan Case Conference And a second sec CentreLink Medical Certificate Centrelick Medical Certificate Comprehensive Medical Assessment 712 Connect Hearing Referral Contringing care referral CTG - Patient consent CTG - Patient consent CTG - Patient windows consent CVS Referral CVS Referral CVS User conternal CVS Vascular refermal D904 Veteran'S Affairs -----Augustation (Pres) DMMR - Form1 Yes Yes DMMR - Form2 ..... 1000 Yes EPC Dental care EPC Referral Rename template Delete template Open Cancel

This option will print a list or print labels for all the patients currently displayed on the screen.

You have the option to select the 'Mark as sent' and 'Add a new reminder for those marked for auto-update'. Be careful if using this option that you only tick the 'Mark as sent' option if you do wish to have all the patient's reminders marked. If you are simply printing a list for checking purposes you should 'untick' this check box.

You can customise the format of the labels being printed by selecting '**Setup' > 'Labels'** from the main Best Practice screen.

# Save as file

This option will allow you to save the list of patients in either an XML, CSV or TXT file format that can be used in an external application.

You have the option to select the 'Mark as sent' and 'Add a new reminder for those marked for auto-update'. Be careful if using this option that you only tick the 'Mark as sent' option if you do wish to have all the patient's reminders marked.

# **Reprinting / Resending Reminders**

There are 2 cases where you may wish to Resend / Reprint Reminders

- 1. Reprint Reminders there was a problem when you printed the previous reminders (i.e. printer crash, paper jam, etc) and not all letters were printed or you forgot to tick the box to save the letter into the patient's file.
- 2. Resend Reminders the next round of reminders for certain reminder types (i.e. pap smears) need to be generated for those patients who have not actioned the reminder.

### Reprinting Reminders (Resend Batch)

Each time that reminders letters or lists are printed, the system will record that a 'batch' number. This batch can be displayed again so that all or individual letters can be printed.

Select *File > Resend Batch* [CTRL+R]. This will display a list of all previously sent reminder batches.

- Select the batch that you wish to resend and press the *Load* button.
- The list of patients who where included in that Reminders batch will be displayed.

Batch No.	Sent date	Sent time	Sent by
1	23/02/2006	11:24 am	Dr. Frederick Fir
2	04/03/2012	4:54 pm	Dr. Frederick Fir
3	04/03/2012	4:57 pm	Dr. Frederick Fir

- If all patients are to have the reminders letters generated for them again, click the 'Send Reminders' button and follow the steps above for Mail Merge, Print List, etc.
- If you only want to print letters for certain patients, use the '**Remove from list**' button to remove any names that are not required, then click the '*Send Reminders'* button and follow the steps above for Mail Merge, Print List, etc.

### **Resend Reminders (Previously Sent Reminders)**

Once a reminder has been printed and the '**mark as sent'** tick box selected, the reminder will be shown on the patient's record as '**sent'**. As they are marked as 'sent' they will no longer appear on the '**Clinical'** > '**Reminders'** screen when you use the '**Select patients**' button.

For some reminder types, it is a requirement that a series of reminder letters be sent to the patient. You can use the option **'View'** > **'Sent Reminders'** to identify reminders that have previously been sent and have not been actioned.

Select 'View' > 'Sent Reminders' from the 'Clinical' > 'Reminders' screen.

The **'Previously sent** reminders' screen will be displayed.

By default the screen will display all reminders sent during the past year that are still marked as 'Unactioned'.

Various filters can be used to change the sent reminders displayed on the screen.

**'Show unactioned only'** - untick this box to display all reminders sent over the selected range of dates

Previously sent reminde	15				
File Help					
& V					
V Show unactioned only	Show all patients		Mark Se	end again	
Sent on orafter: 4/03/20	11 - Sent on or before: 4/03/2012	Bydoctor: All		<ul> <li>Reason:</li> </ul>	All
Name	Reason	Doctor	Sent	Sent as	A
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bbott, Alan John	Full medical	Dr F. Findacure	04/03/2012	Mail merge	
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**Tip:** Refer to the section below on **'Mark as performed'** for details on how reminders are marked as actioned in the patient's record.

'Show all patients' – untick to prompt for an individual patient to show sent reminders records for

'Sent on or after' and 'Sent on or before' – use these filters to display a list of sent reminders.

'By doctor' – use this filter to display reminders related to individual doctors

'Reason' – use this filter to display reminders related to individual reminder reasons

**'Mark'** – to mark a particular reminder record as performed, highlight that reminder and click the **'Mark'** button. This will do the same as the **'Mark as performed'** function within the patient record (see section below for details)

**'Send again'** – this function can be used to send another round of reminder letters, etc. The entire list of patients on the screen will be included.

#### 'Mark as Performed'

- when a patient visits with regard to a reminder, the reminder should be marked as 'Performed' so that it no longer appears

Туре	Due	Reason	
Reminder sent Reminder sent Preventive health Preventive health	05/03/2012 05/03/2012 04/03/2012 04/03/2012	Dibbetes review Sent on 04/03/2012 Full medical Sent on 04/03/2012 Influenza vaccination should be considered Vaccination against pneumococcus should A Health Assessment should be considered	Add action Add reminder
Preventive health	04/03/2012		Mark item as performed
			Delete item



when checking for reminders that need to be resent.

To do this, open the patient's record and highlight the reminder. Right click and select 'Mark item as performed'.

# Creating / Editing Reminder Template Letters

Refer to the document, BP\_FAQ-BPTemplates\_Reminders.pdf for details on how to created or edit a Reminder Template letter.

Tip: There are a wide range of F.A.Q. documents accessible by browsing to the \FAQ folder on the Best Practice installation DVD.

### MORE INFORMATION

For more information consult the Best Practice Help Library or contact us via our

To maximize your time, productivity and revenue you should evolve to Best Practice Software



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