

## 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*'

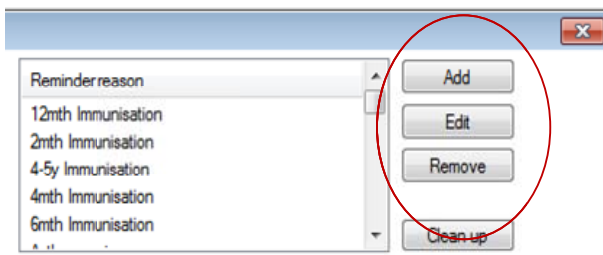
Below is a summary of the steps to set up Reminders:-

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

### Configuration of Reminders

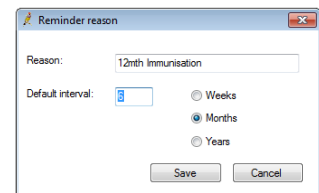
#### Creating new Reminder Reasons

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



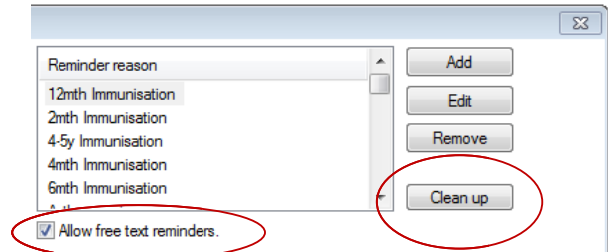
- To setup the reminders, select '**Setup**' > '**Configuration**' from the main Best Practice screen.
- Scroll down on the left hand side to find the '**Reminders**' icon.
- The top section of the screen shows the "**Reminder Reason**" list- this is the full list of reminder reasons available when reminders 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.





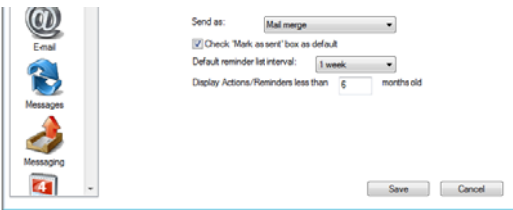
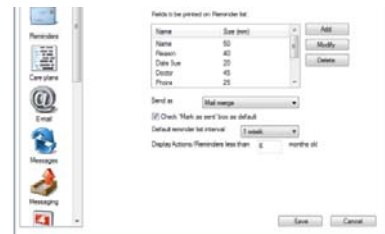
- The '**Clean up**' button allows you to view all reminder reasons currently setup in the system and allocate them to a more appropriate reminder reason.
- This process is handy for when you wish to rename bulk amounts of reminders that were incorrectly worded.



**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 not 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.



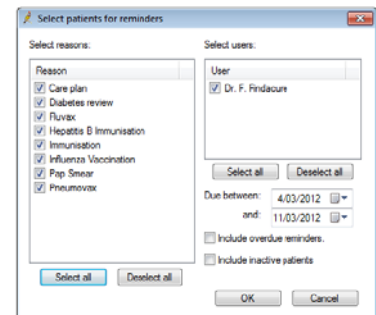
**Send as** – to change the default "send as" option on the '**Clinical**' > '**Reminders**' > '**Sent reminders**' screen, select the desired method of sending from the drop down list. The default selection is **Mail merge**.

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

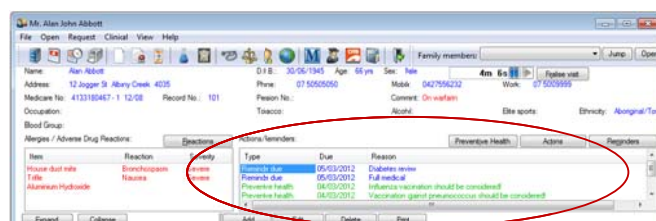
'**Reminders**' > '**Sent reminders**' screen to be ticked.

**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**.



### Add / Edit Reminders

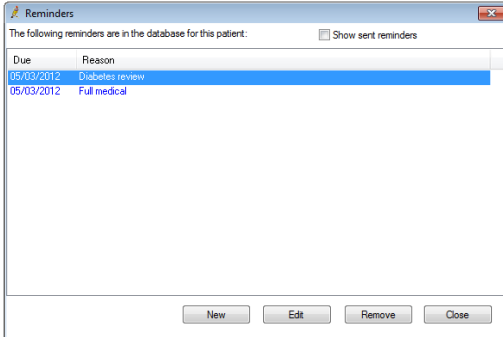


Open the relevant patient's record.

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.



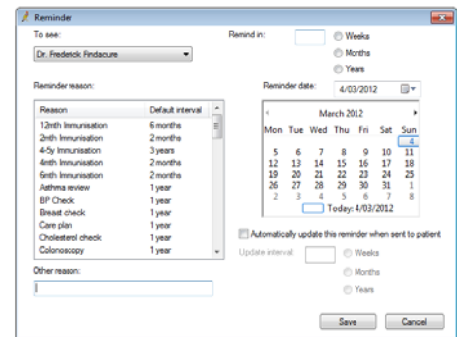
**Add Reminder:** - Click on the **'Reminders'** button in the middle right hand section of the patients files (next to the actions button).

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

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.

**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.

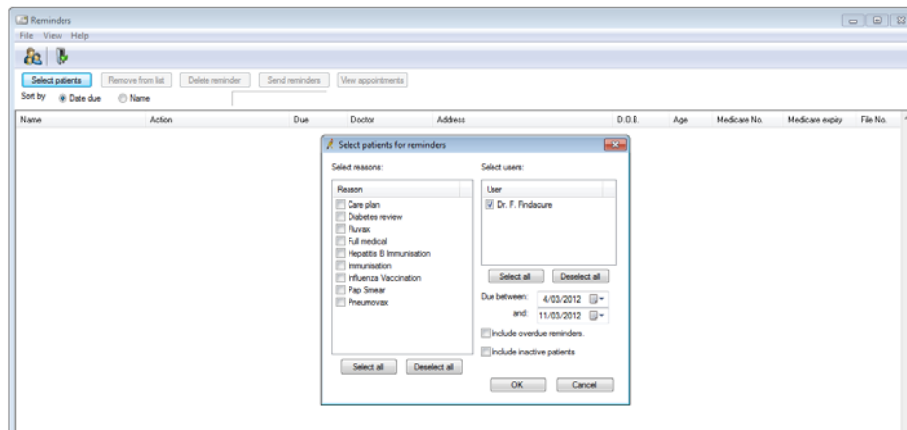


Step 1:- Generate a list of patients who require Reminders sent to them.

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.



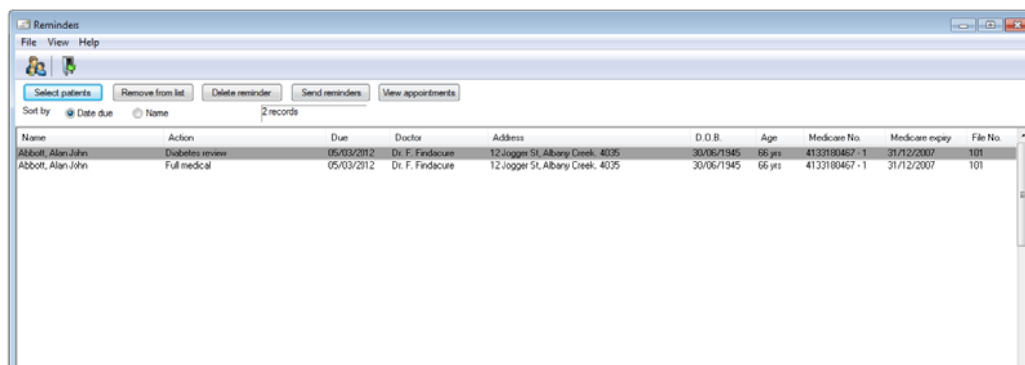
 - click on the **'Select Patients'** button to display the **'Select patients for reminders'** screen.



**Note:** This function will display only those reminders that have not 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.





**Remove from list**

Use this option if there are some patients that you do not wish to include in this mailout, highlight their name and press the **'Remove from list'** button. This will not remove the actual reminder so this patient can be included in a future reminder mailout.

**Delete reminder**

Use this option if you wish to remove this reminder from this patient's record

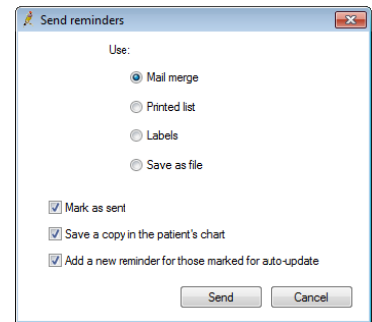
**Send reminders**

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: -

- 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.



**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.

Type	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!

#### **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:** [Perform a Test Print](#)

*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.*

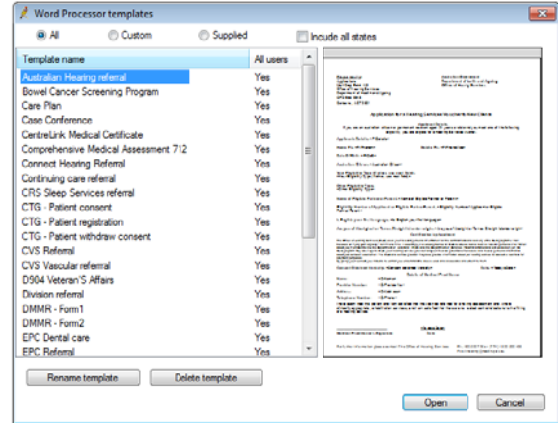


When the Mail Merge button is pressed, the **'Word Processor Templates'** screen will be displayed.

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

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

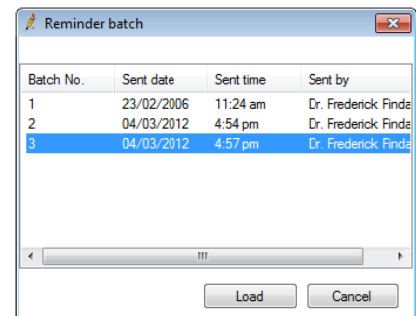
1. Reprint Reminders - there was a problem when you printed the previous reminders (i.e. printer crash, paper jam, etc) and not all letters were printed or you forgot to tick the box to save the letter into the patient's file.
2. Resend Reminders - the next round of reminders for certain reminder types (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 were included in that Reminders batch will be displayed.





- 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.

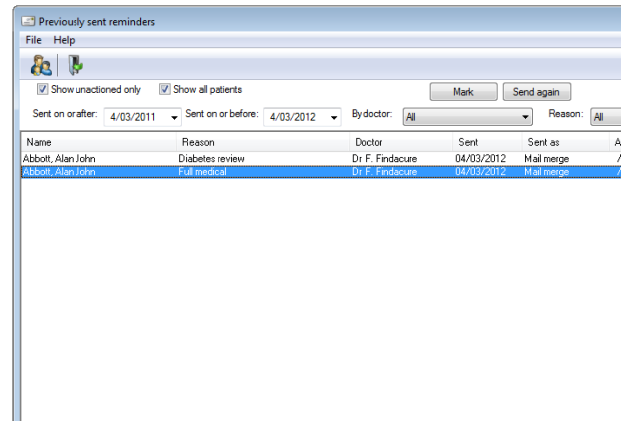
Select '**View**' > '**Sent Reminders**' from the '**Clinical**' > '**Reminders**' screen.

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



**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

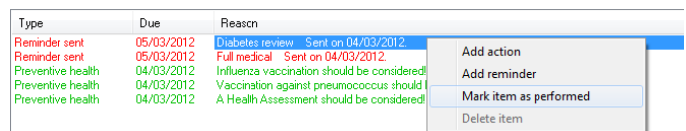
**'Reason'** – use this filter to display reminders related to individual reminder reasons

**'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





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



**07 4155 8800**



<http://forum.bpssoftware.com.au>



**07 4153 2093**



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**Last Reviewed: 06./03/2012**