



## Recalls & Reminders using MedicalDirector Clinical

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#### Our Learning Objectives:

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

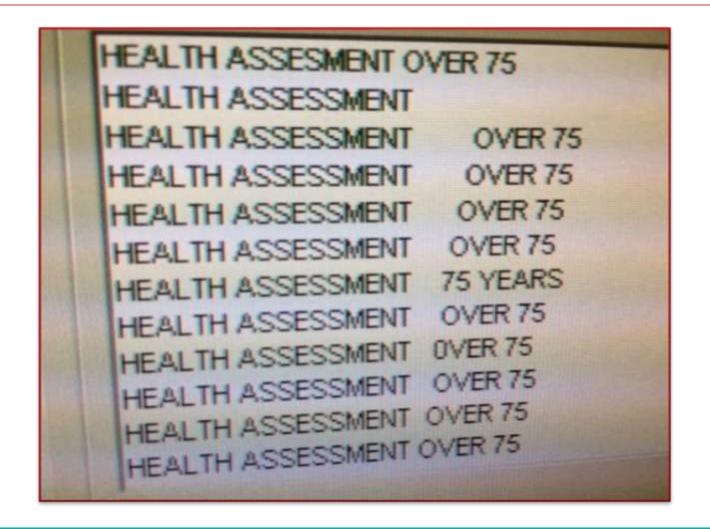
#### 1. Design an effective recall and reminder system



#### Practices need:

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

#### This is what can happen without a 'system':



#### Actions, Reminders & Recalls

■ **RECALLS** (ie clinically significant/medicolegal) 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

#### Save time, money & minimize risk

COIL REMOVAL

COLON

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COLONOSCOPE

COLONOSCOPY

COLONOSCOPY AND ENDOSCOPY

COLONOSCOPY REPORT AND REVIEW

COLONSCOPY

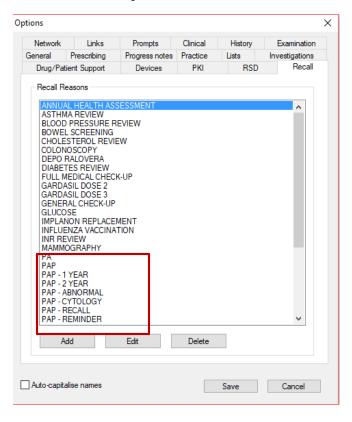
COLPOSCOPY

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



Or A Practitioner	<u> </u>
Recall Reason	Due Date:
PAP/CERVICAL TEST	1/12/2022
GENERAL CHECK-UP GLUCOSE IMPLANON REPLACEMENT INFLUENZA VACCINATION INR REVIEW MAMMOGRAPHY PAP SMEAR	Recall Options  Return urgently  Once only Recall  Recall Interval
PAP/CERVICAL TERT PNEUMONIA VACCIMATION PROSTATE REVIEW SKIN CHECK TETANUS VACCINATION WEIGHT REVIEW	□ 5 ⊕ Weeks



#### 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

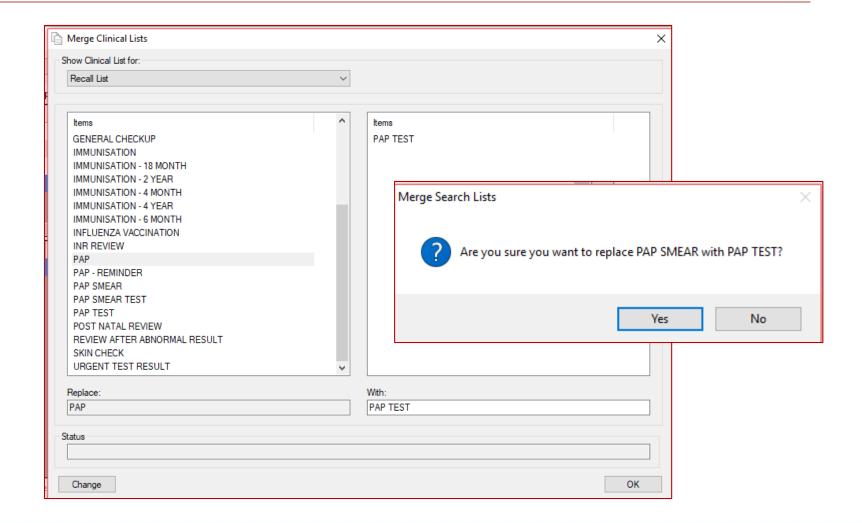
#### Clean up









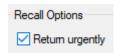


#### 2. Use Actions for preventive health activities

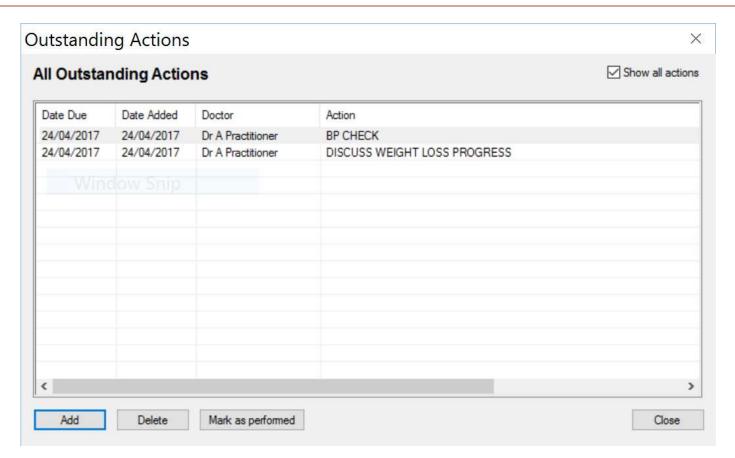


A reminder for the clinician when the patient next presents. eg. discuss smoking, repeat BP etc

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**



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

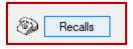
#### 3. Add, view and modify patient recalls & reminders

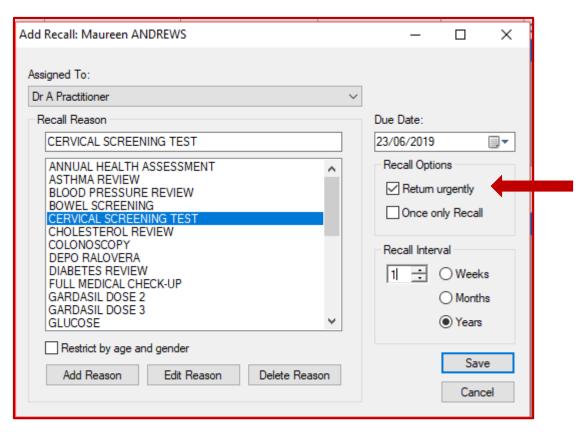
#### Add from:

- patient record
- immunisations
- review screen
- Holding File



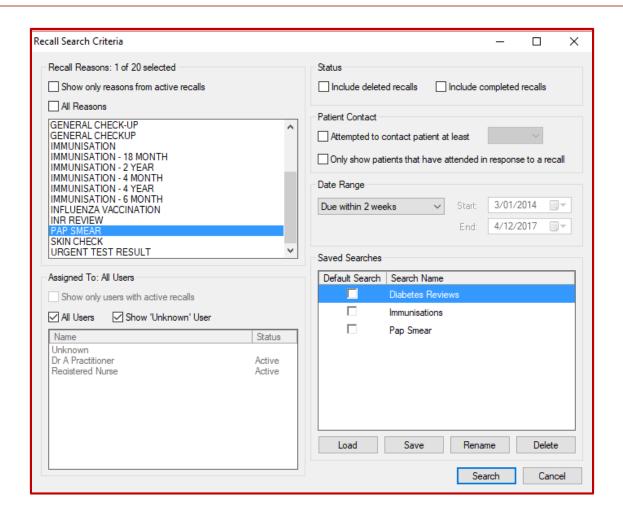
#### Add, view and modify patient recalls & reminders



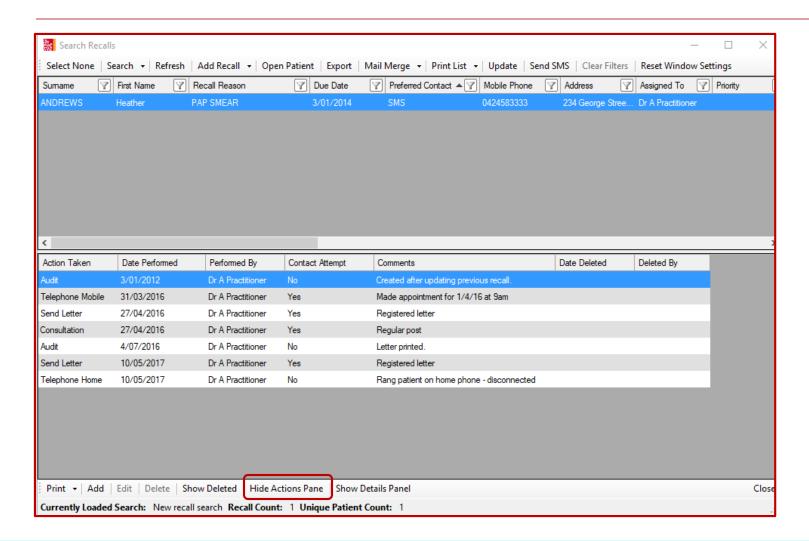


Tick 'Return Urgently' to flag this is a 'Recall' ie probability of harm, must be followed up until patient returns.

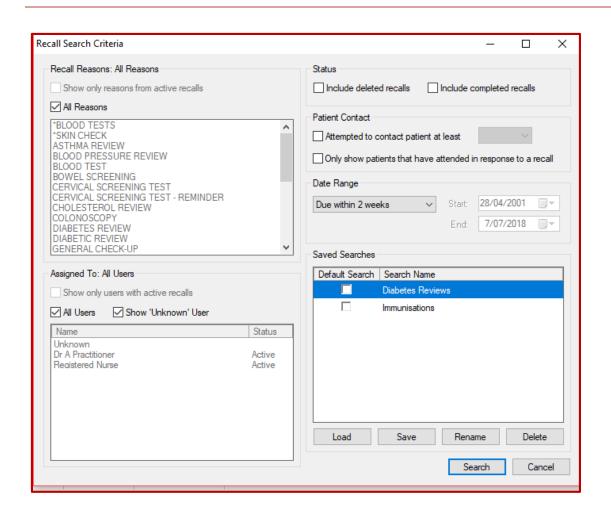
#### 4. Generate Recall and Reminder Lists

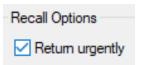


#### Display Actions Pane (Audit Trail)

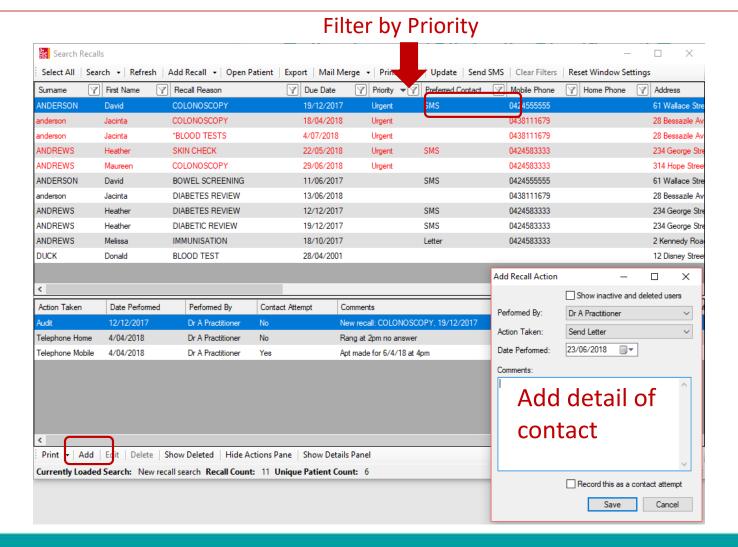


#### Following up 'Clinically Significant' Recalls'

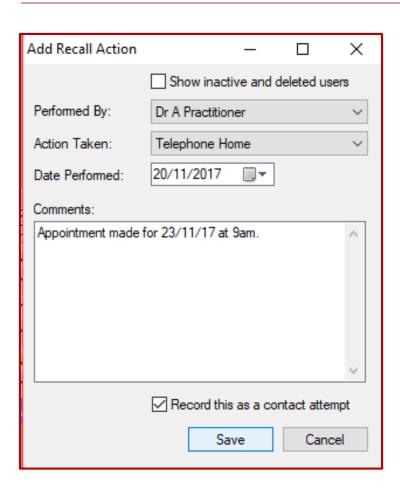




#### Following up 'Clinically Significant' Recalls'

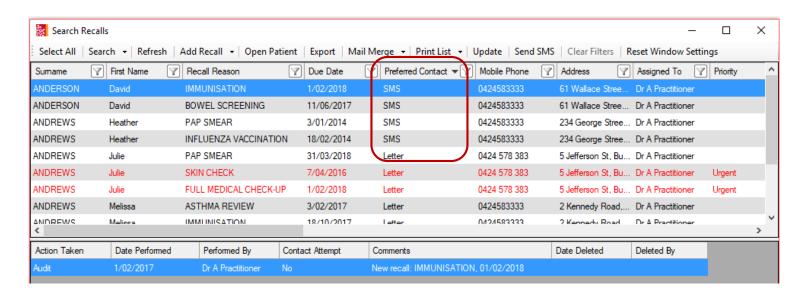


### Follow Up Recalls & Reminders



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

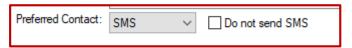
#### Consent for SMS



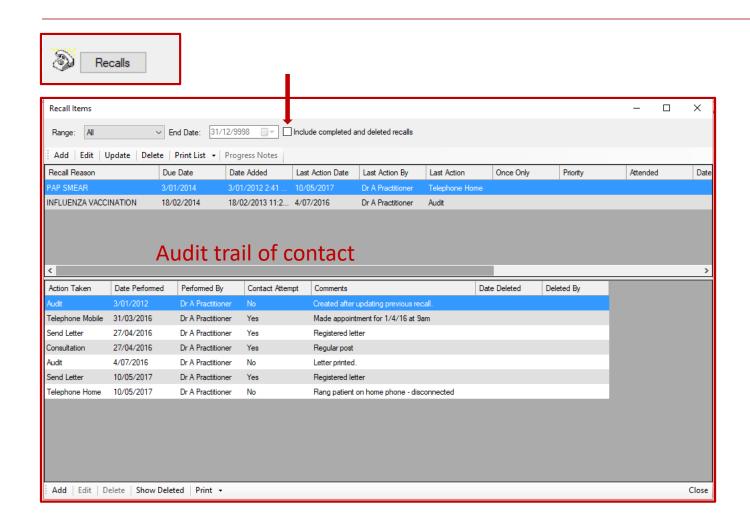
- ✓ Bulk select and bulk send SMS.
- ✓ Opt-in consent now in PracSoft



- ✓ Add Preferred Contact in Patient Details in MedicalDirector Clinical
- ✓ Tickbox 'Do not send SMS' if patient consent has not been given.



#### When patient returns: delete recall



#### RECALLS

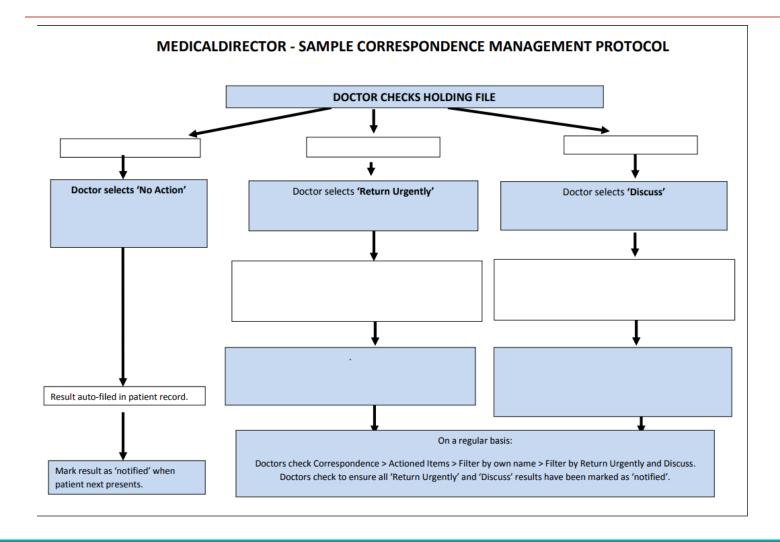
I will remember to remove the recall. I will remember to remove the recall.

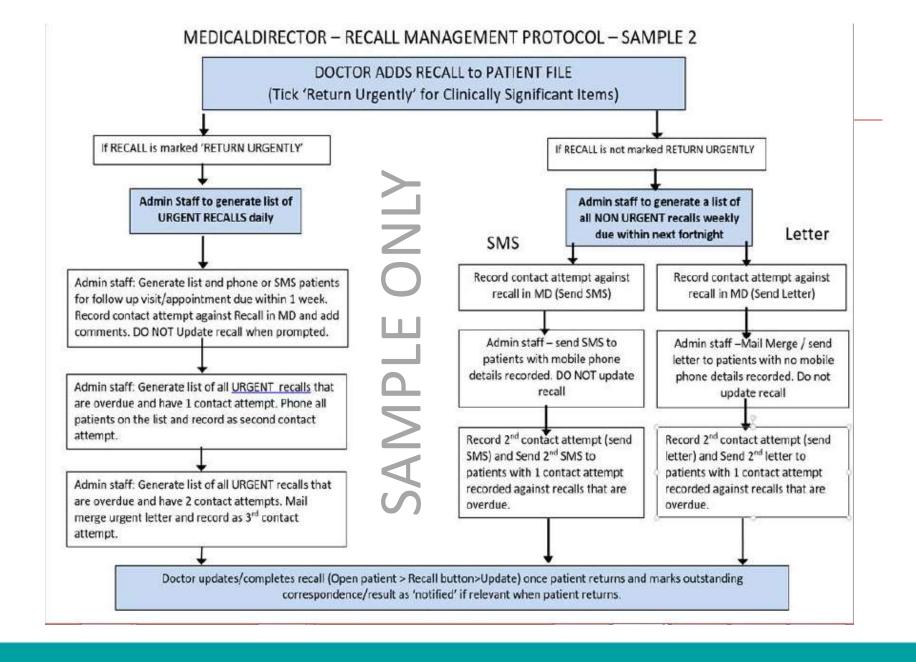
#### Results (Holding File Follow-up) 'System'

Pathology Results Specialist Letters Scanned documents

# REATE YOUR OWN

#### What's your Correspondence Management 'system'?





#### 5. 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 5<sup>th</sup> standards

#### Preventive health management

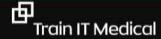
Identify at risk groups/patients

Flag for follow up / recall

Screen/test or refer patient

Review result & action (if necessary)

Recall patient as required



#### **General Practice Standards**



#### RACGP 5<sup>th</sup> 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 5<sup>th</sup> standards

#### Searches, screening, recalls & reminders

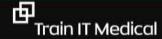
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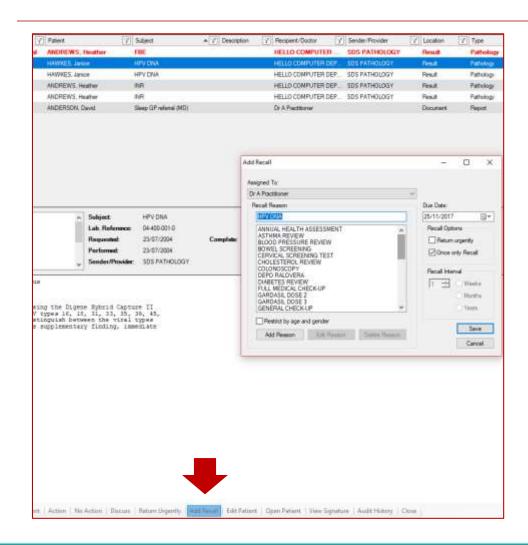
#### **Accreditation Standards**

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 5<sup>th</sup> standards

#### 6. Immunisation & Cancer Screening



#### A systematic approach

	•	-					have given it yo					Legend
e boxes pres	ented do n	ot reflect 'Catch	-up' dosing.	For more infor	mation regardin	g 'Catch-up'	dosing click her	e>				Catch-up Dose
is table has b	een prepar	ed from informa	tion containe	d in the Austr	alian Immunisati	ion Handboo	k, 10th Edition 2	2013 and State	e schedules as a	mended fro	om time to time.	
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Birth		Engerix B(										
2 mths		Infanrix He	Infanrix	Infanrix	Infanrix He			RotaTeq	Prevenar 13			
4 mths		Infanrix He	Infanrix	Infanrix	Infanrix He			RotaTeq	Prevenar 13			
6 mths		Infanrix He	Infanrix	Infanrix	Infanrix He			RotaTeq	Prevenar 13			
12 mths					Hiberix	MMR-II	Meningitec					
18 mths										Varilrix		
2 yrs												
4 yrs			Infanrix I	Infanrix I		Priorix						
10-15 yrs											Dose 1	
10-15 yrs											Dose 2	
10-15 yrs											Dose 3	



#### Proactive preventive health searches

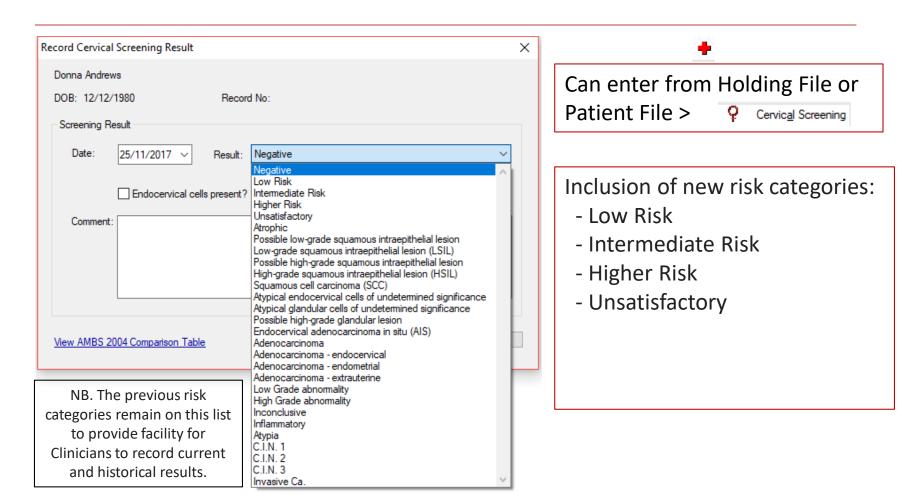


Under screened? Never screened? Hard to reach groups? Good, systematic preventive health care.

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.

#### Enter screening results





Download the cheatsheet for entering breast, bowel and cervical screening results

#### **Further Information**



<u>Train IT Medical Free Resources – Cervical Screening Program</u>

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'

<u>Cancer Institute NSW 'Information for Health Professionals'</u>

**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

#### **Further Information**



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

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