



Train IT Medical
Competence with Confidence



MedicalDirector

Recalls & Reminders

- Using MedicalDirector Clinical -

Presented by:

Katrina Otto

Train IT Medical Pty Ltd

www.trainitmedical.com.au

katrina@trainitmedical.com.au





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](#)



Reminder

RACGP 5th Standards Criterion

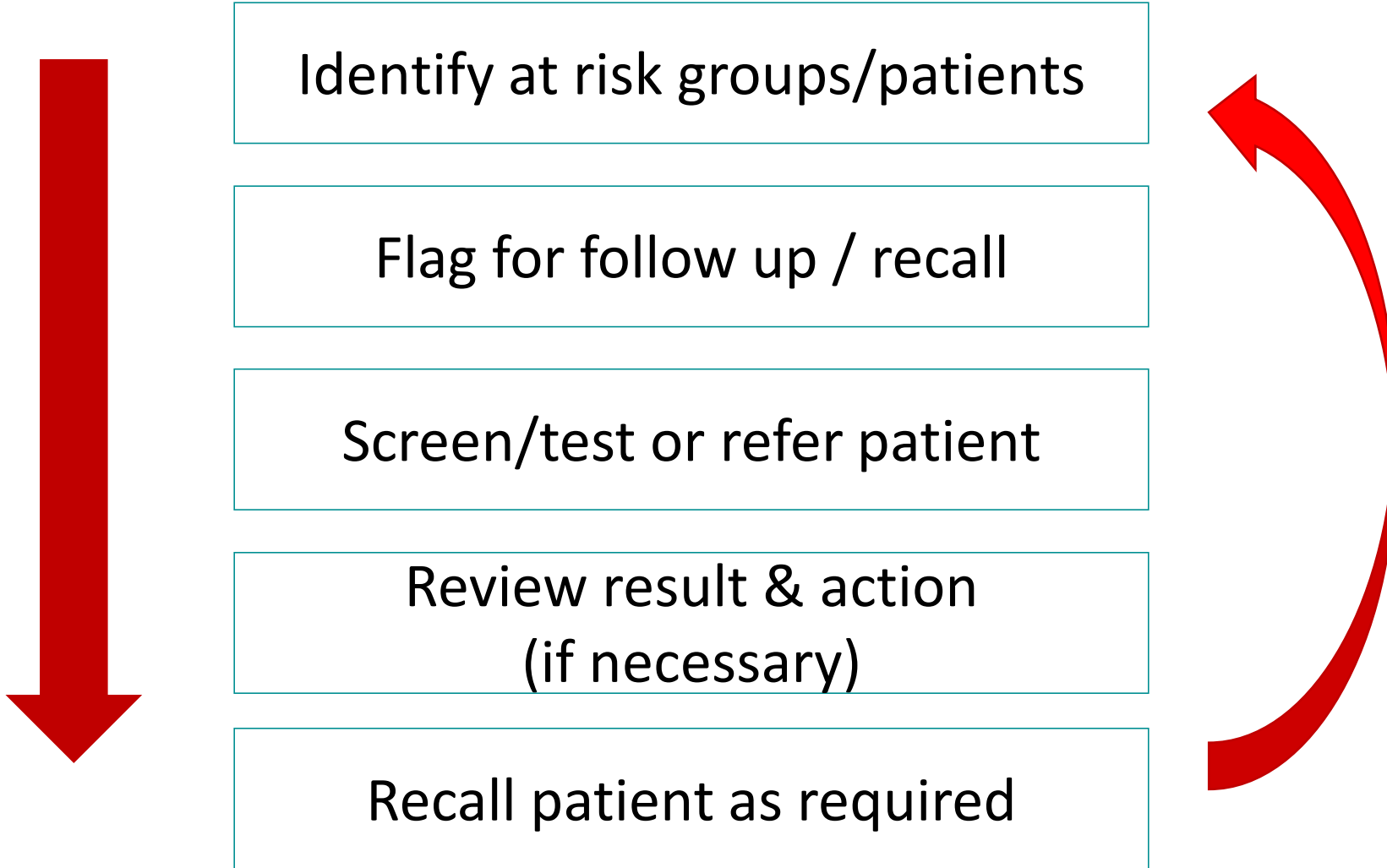
C4.1 - Health promotion and preventive care

“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



2. Design a recall and reminder system

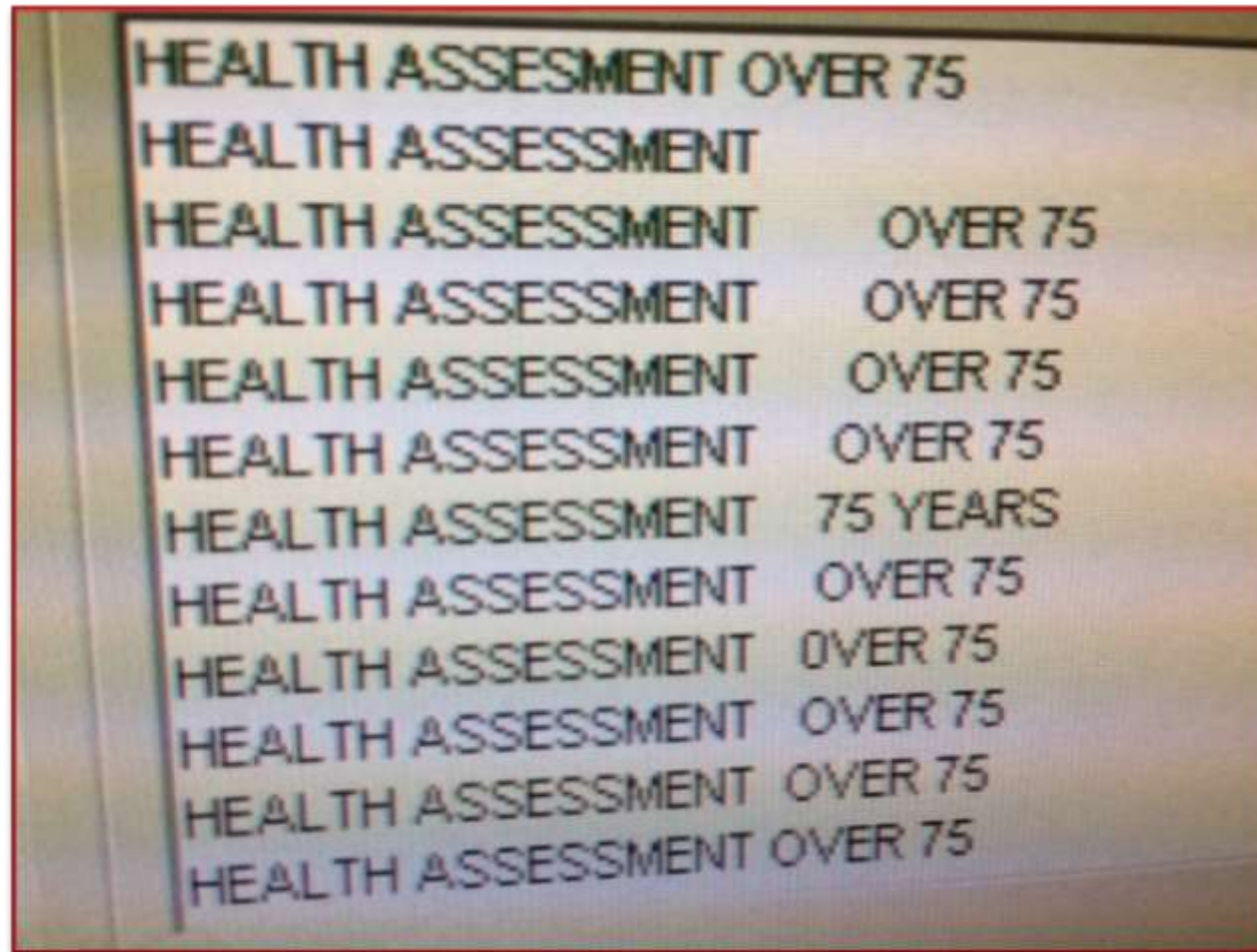


Actions, Recalls and Reminders

- **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

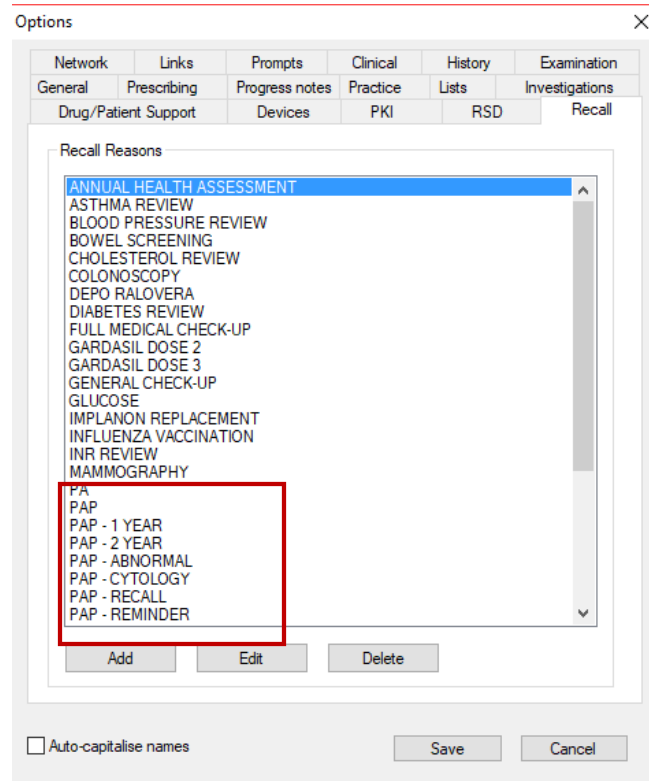
COIL REMOVAL
COLON
COLONO
COLONOSC
COLONOSCO
COLONOSCOPI
COLONOSCOPE
COLONOSCOPY
COLONOSCOPY AND ENDOSCOPY
COLONOSCOPY REPORT AND REVIEW
COLONOSCOPY
COLPOSCOPY

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



MedicalDirector®

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

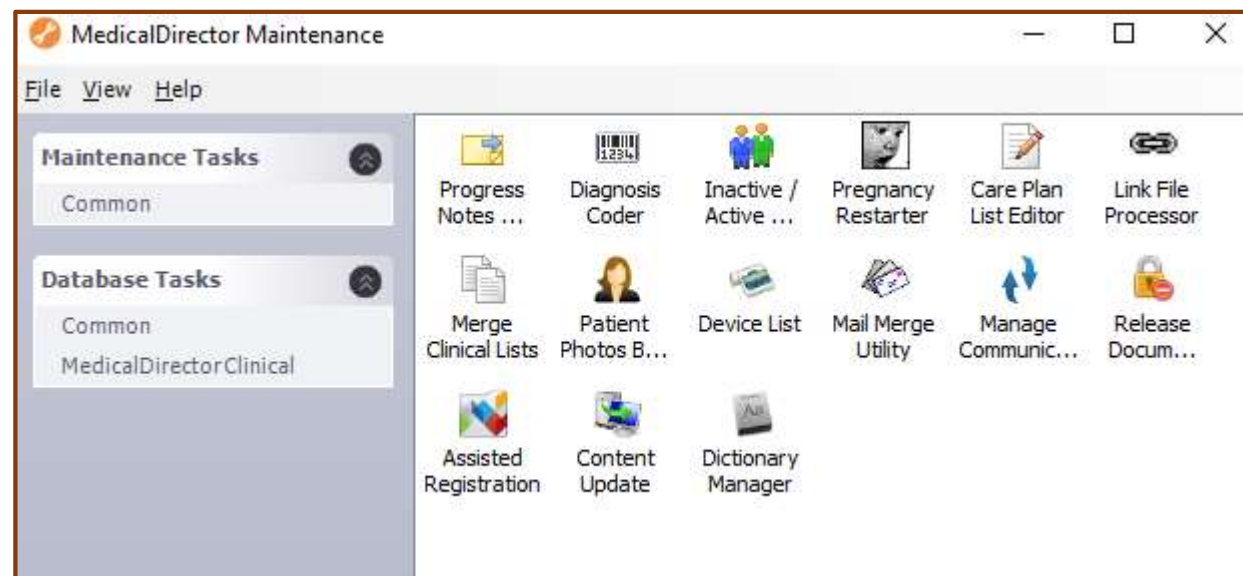




Time for a Clean Up?

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



A screenshot of a software interface showing a "Merge Clinical Lists" dialog box. The dialog has a dropdown menu for "Show Clinical List for:" set to "Recall List". It contains two lists of items. The left list includes "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", and "URGENT TEST RESULT". The right list contains "PAP TEST". Below the lists are input fields for "Replace:" (containing "PAP") and "With:" (containing "PAP TEST"). A "Status" field is also present. At the bottom are "Change" and "OK" buttons. A smaller "Merge Search Lists" dialog box is overlaid on top, containing a question mark icon and the text "Are you sure you want to replace PAP SMEAR with PAP TEST?". It has "Yes" and "No" buttons.



Actions, Reminders & Recalls

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

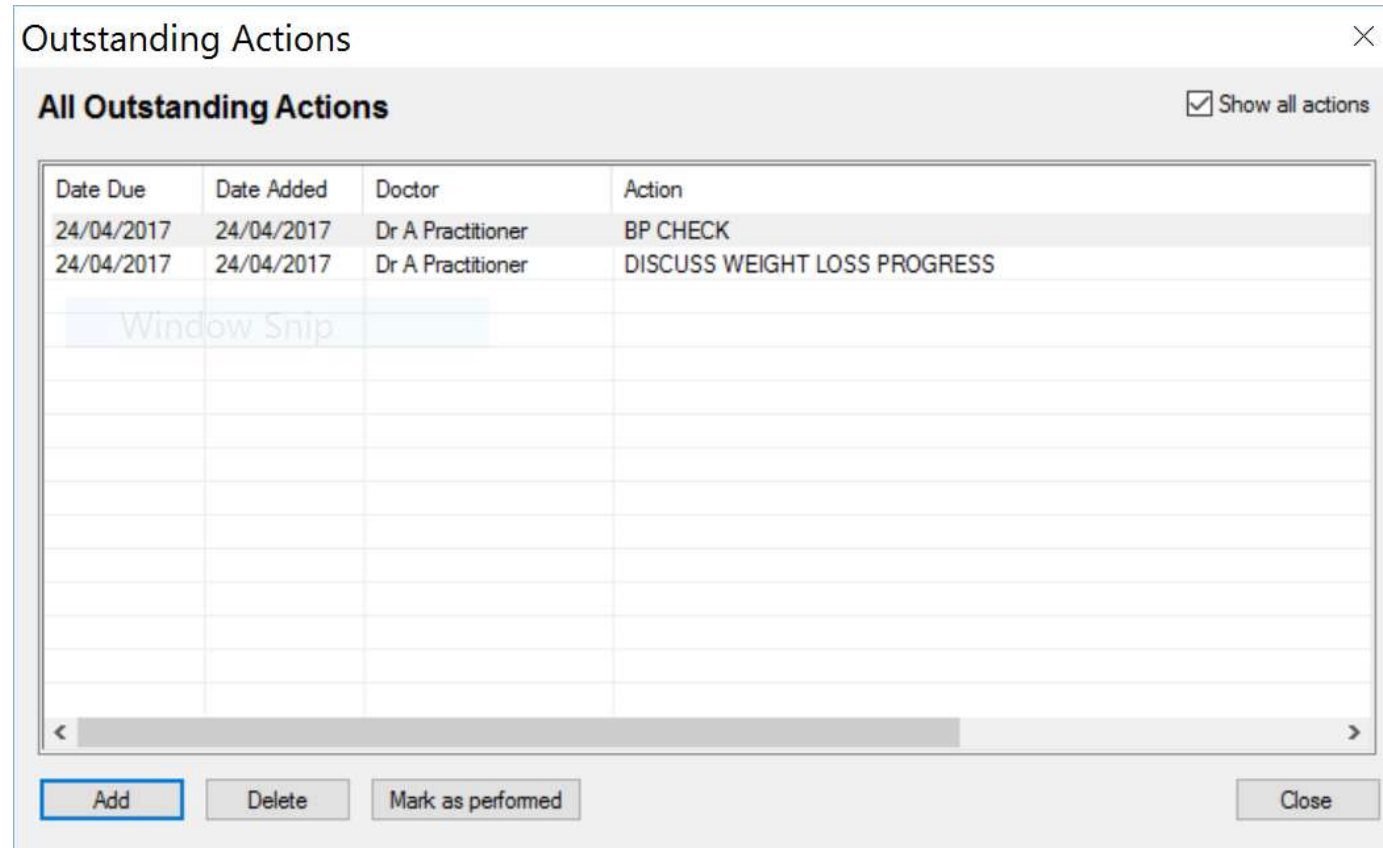
For 'reminders' that are only for the clinician, consider:

'ACTIONS' eg. Discuss screening, discuss smoking

3. Use Actions for preventive health activities



Actions



The screenshot shows a window titled "Outstanding Actions" with a close button (X) in the top right corner. Below the title bar, there is a section header "All Outstanding Actions" and a checkbox labeled "Show all actions" which is checked. The main content is a table with four columns: "Date Due", "Date Added", "Doctor", and "Action". The table contains two rows of data. Below the table, there are four buttons: "Add", "Delete", "Mark as performed", and "Close".

Date Due	Date Added	Doctor	Action
24/04/2017	24/04/2017	Dr A Practitioner	BP CHECK
24/04/2017	24/04/2017	Dr A Practitioner	DISCUSS WEIGHT LOSS PROGRESS

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

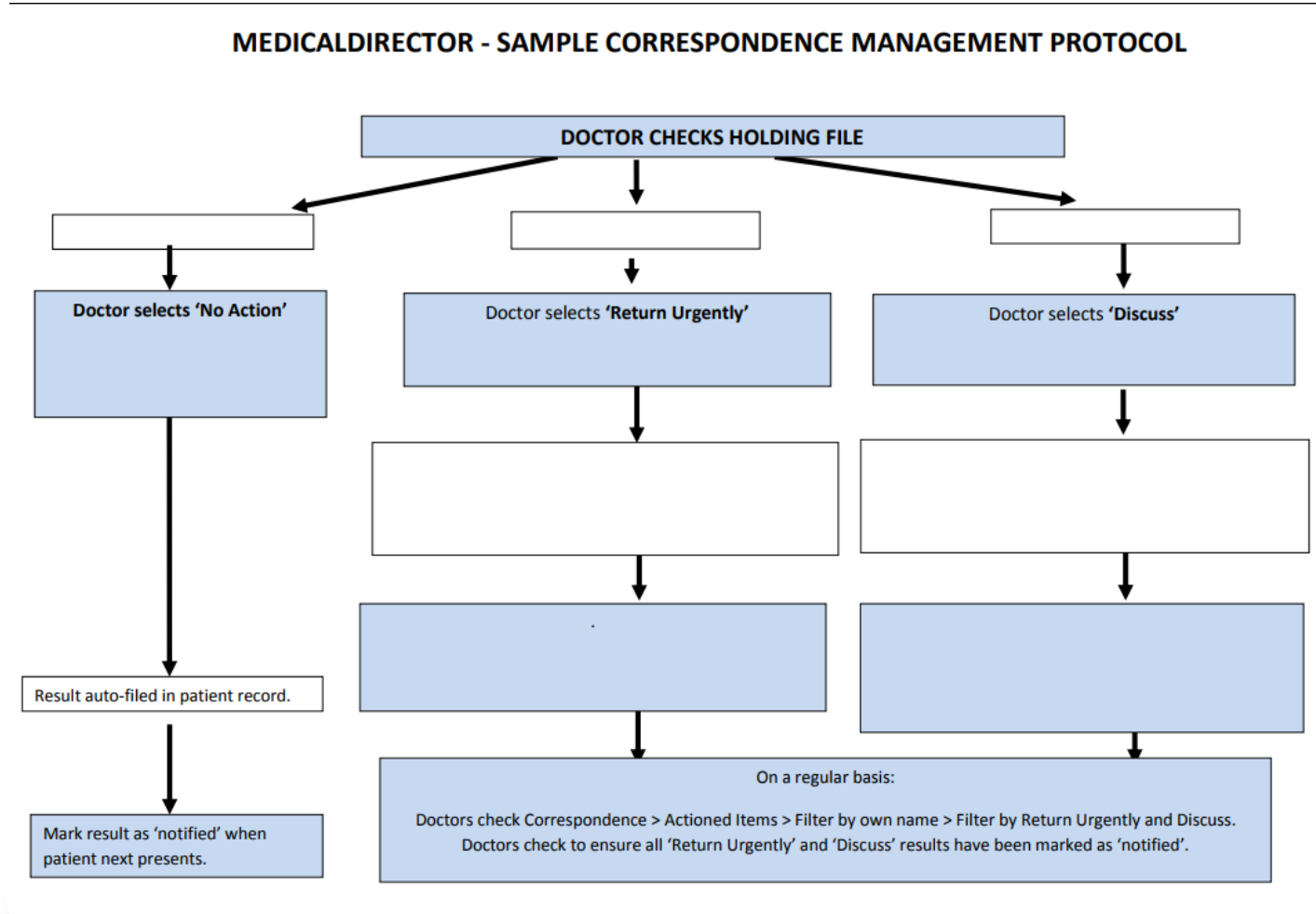
4. Add, view and modify patient recalls & reminders

Add from:

- patient record
- immunisations
- review screen
- Holding File

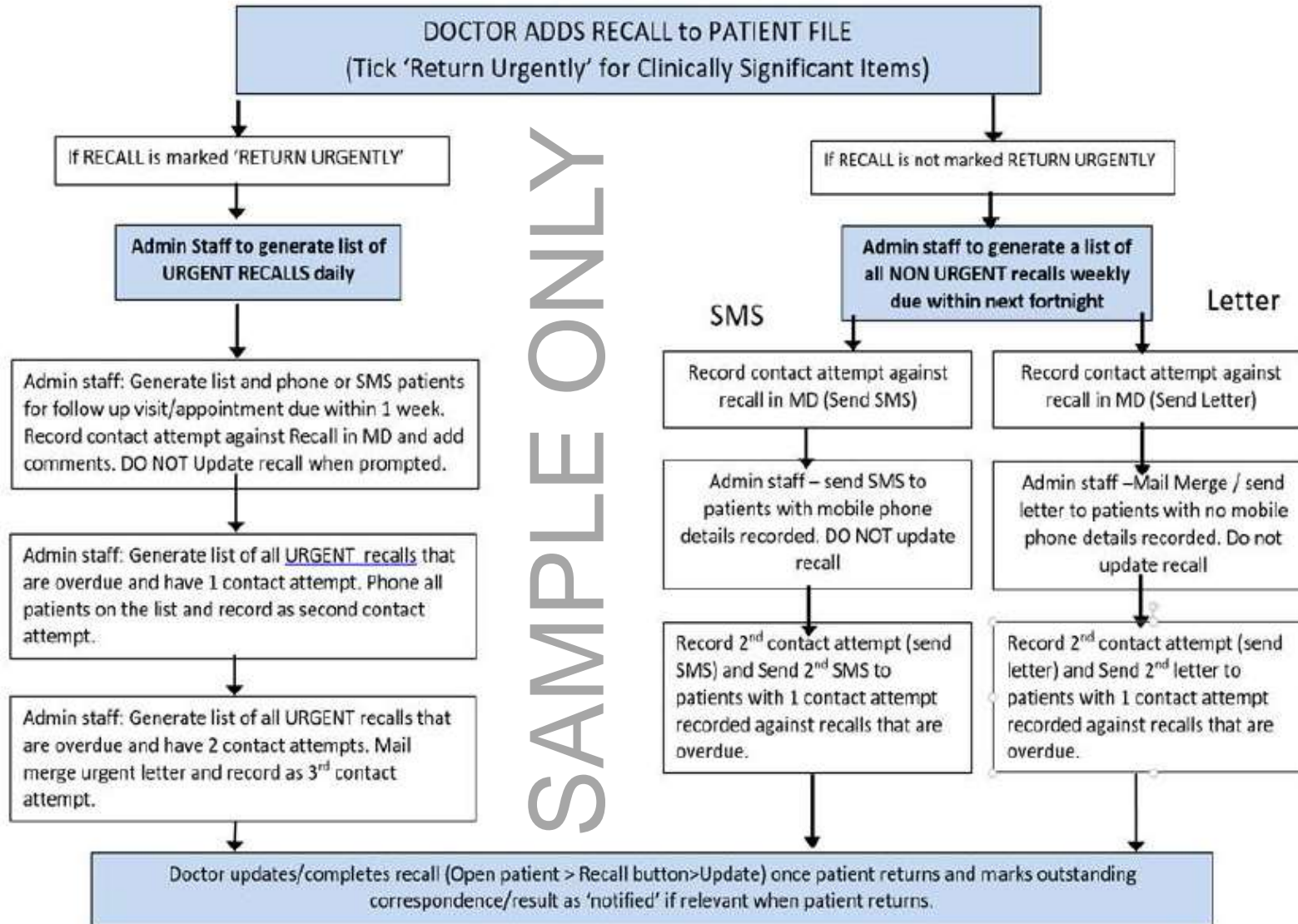


What's your Correspondence Management 'system'?



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)

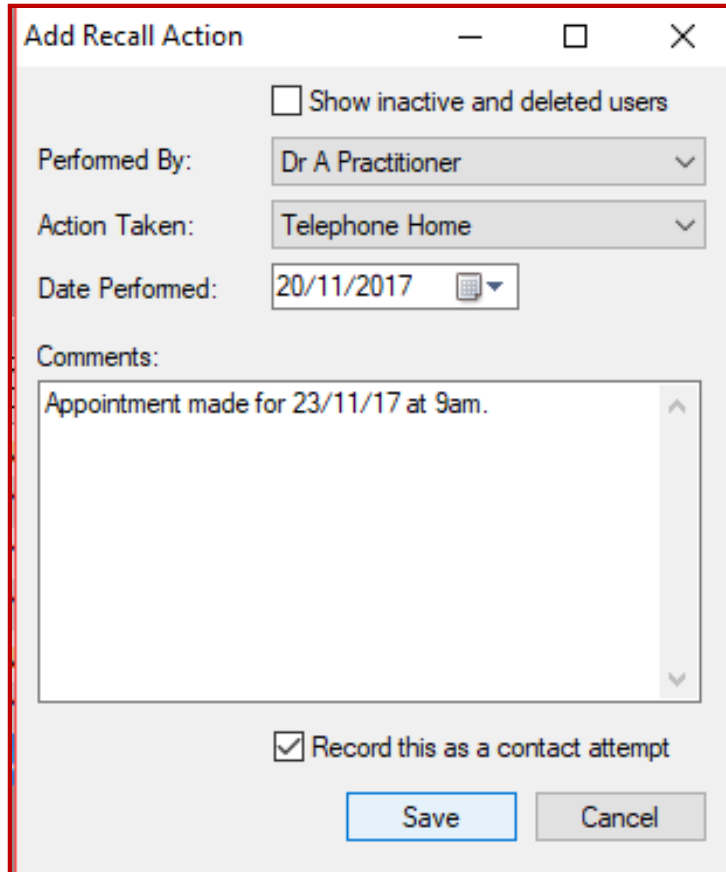
The screenshot shows a web application window titled "Search Recalls". The window has a menu bar with options: Select None, Search, Refresh, Add Recall, Open Patient, Export, Mail Merge, Print List, Update, Send SMS, Clear Filters, and Reset Window Settings. Below the menu bar is a header row with dropdown menus for: Surname, First Name, Recall Reason, Due Date, Preferred Contact, Mobile Phone, Address, Assigned To, and Priority. The main data row shows: ANDREWS, Heather, PAP SMEAR, 3/01/2014, SMS, 0424583333, 234 George Stree..., and Dr A Practitioner.

Below the header is a large grey area, likely a placeholder for a detailed view of the selected record. At the bottom of this area is a table with the following data:

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		

At the bottom of the window is a footer bar with buttons: Print, Add, Edit, Delete, Show Deleted, Hide Actions Pane (highlighted with a red box), Show Details Panel, and Close. Below the footer bar, it displays: Currently Loaded Search: New recall search Recall Count: 1 Unique Patient Count: 1.

Follow Up Recalls & Reminders



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

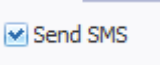
Save Cancel

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

Consent for SMS

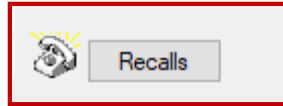
Surname	First Name	Recall Reason	Due Date	Preferred Contact	Mobile Phone	Address	Assigned To	Priority
ANDERSON	David	IMMUNISATION	1/02/2018	SMS	0424583333	61 Wallace Stree...	Dr A Practitioner	
ANDERSON	David	BOWEL SCREENING	11/06/2017	SMS	0424583333	61 Wallace Stree...	Dr A Practitioner	
ANDREWS	Heather	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		
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		

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

The screenshot displays a medical software interface with a table of patient records and an 'Add Recall' dialog box. The table has columns for Patient, Subject, Description, Recipient/Doctor, Sender/Provider, Location, and Type. The 'Add Recall' dialog box is open, showing fields for Assigned To (Dr A Practitioner), Recall Reason (a list of medical reasons), Due Date (25/11/2017), and Recall Options (Return urgency, Once only Recall). The Recall Interval is set to Weeks. A red arrow points to the 'Add Recall' button in the bottom toolbar.

Patient	Subject	Description	Recipient/Doctor	Sender/Provider	Location	Type
ANDREWS, Heather	IBS	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	IBS	HELLO COMPUTER DEP	SDS PATHOLOGY	Result	Pathology	
ANDREWS, Heather	IBS	HELLO COMPUTER DEP	SDS PATHOLOGY	Result	Pathology	
ANDERSON, David	Sleep GP Referral (MD)	Dr A Practitioner	Document	Report		

Add Recall

Assigned To: Dr A Practitioner

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 urgency
 Once only Recall

Recall Interval:
 Weeks
 Months
 Years

Restrict by age and gender

Buttons: Add Recall, Edit Recall, Delete Recall, Save, Cancel

Bottom toolbar: Action, No Action, Discuss, Return Urgently, **Add Recall**, Edit Patient, Open Patient, View Signature, Audit History, Close

Need to enter screening results too

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.

Can enter from Holding File or Patient File  Cervical Screening

Inclusion of new risk categories:

- Low Risk
- Intermediate Risk
- Higher Risk
- Unsatisfactory



Proactive preventive health searches



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>
- [Train IT Medical Free Resources – Cervical Screening Program](#)
- [Train IT Medical Blog – MedicalDirector Clinical Top 5 'Recalls & Reminders' Tips](#)
- [Train IT Medical Blog – Differentiate between 'Clinically Significant recalls and Preventive Health Reminders'](#)
- **MedicalDirector Guide - Recalls, Reminders & Outstanding Requests**



Further Information

[Clinical risk management in general practice - RACGP](#)

[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'](#)

[HotDoc & MedicalDirector – Where are Recall notes entered into the patient file?](#)

[HotDoc & Pracsoft – How do Reminders write back to my Pracsoft Appointment Book?](#)

[How does HotDoc sync results?](#)



For further learning and free resources:

katrina@trainitmedical.com.au

Twitter: [trainitmedical](https://twitter.com/trainitmedical)

Facebook: [trainitmedical](https://www.facebook.com/trainitmedical)

www.trainitmedical.com.au

Access more free practice resources
& [blog posts](#)

[Subscribe to my blog](#)



Connect with us – we'd love to hear from you.
With best wishes, Katrina Otto