

## Recall System – Cheatsheet (with Outstanding Actions)

# 1

### Adding a recall

1. In patient record **Clinical/Recall** (or <F4>).
2. Click on **Add**.
3. Select an interval (e.g. 3 months). If it is a “one off” recall click on the **Once only Recall** box. If it is an urgent recall click on the **Return urgently** box – urgent recalls will be displayed in red in the Recall window.
4. Click on **Save** and then **Close**.

# 2

### Creating recall list and contacting patients (eg once per month)

1. No patient record open – **Search/Recall...**
2. Select **Interval – 1 month**  
**Select Doctor – ALL**  
**Select all reasons**  
**Only include Users with Recall items**
3. Click **OK**.
4. Highlight and press **Delete** key to remove any unwanted recalls.
5. **Print** Recall list (if necessary) to check validity with doctors. Click on **Cancel** (Not UPDATE or REMOVE)
6. Click on **Save** to save list. Click on **Save** again. Click on **Cancel** (Not UPDATE or REMOVE).  
NB: Save option not available in MD3
7. Click on **Mailmerge**.
8. Select **Recall letter – standard** – this will print all the letters.
9. Click on **Update** (or Remove), then **Close**.
10. Post out letters and make appointments when patient rings.

# 3

### Patient returns to see doctor

1. Open patient record.
2. When **All Outstanding Actions** appears – click on **Mark as performed** and then **Close**.
3. Continue with the consultation.

Date Due	Date Added	Doctor	Action
12/08/2011	16/06/2011	Dr. A. Practitioner	ASTHMA REVIEW

# 4

### Check outstanding actions (weekly)

1. No patient record open – **Clinical** menu/**Outstanding Actions...**
2. Click on **Print** to create list of patients.
3. Check the list
  - contact patient if necessary (phone or letter)
  - click on **Mark** if action has been performed
  - click on **Delete** if no longer valid
4. **Close**



# Medical Director – Recall Flowchart (with Outstanding Actions)

