

Recall System – Double sided Cheatsheet (without 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.
Click on **Save**.
4. Click on **Close**.

2

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

1. No patient record open – **Search... >Recalls**.
2. **Select all Reasons**
Select Doctor – **ALL** (or individual doctor)
Interval – 1 month
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).
7. Click on **Mailmerge**.
8. Select **Recall letter – standard** – this will print all the letters.
9. Click on **Cancel** (Not 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. Click on the Recall due button (the “dancing telephone”).
3. Click on the relevant recall reason (to highlight it) and then click on the **Delete** button.

Please note:

Any “no-shows” will be captured when the next list of recalls is generated, PROVIDED the GP (or other clinician) remembers to click on the **Remove** button



Medical Director – Recall Flowchart (without “outstanding actions”)

