



Recall System – Cheatsheet

1

Adding a recall

1. In patient record **Clinical/Recall** (or Control +R).
2. Click on **Add**.
3. Select **Reason for recall** from list, or type in recall reason.
4. Select **Interval**.
5. Click in box next to **Once only recall**.
6. Click on **Save** and then **Close**.

The 'Add Recall' dialog box shows a dropdown for 'Doctor' set to 'DR. A. PRACTITIONER'. Under 'Reason for recall', 'DIABETES REVIEW' is selected in a text box, and a 'Save Protocol' button is visible. A list of reasons includes 'DIABETES REVIEW'. The 'Interval' section has '3' in a box, with radio buttons for 'Weeks', 'Months' (selected), and 'Years'. 'Recall Date' is '04/12/2003'. The 'Once only recall' checkbox is checked. 'Save' and 'Cancel' buttons are at the bottom.

2

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

1. No patient record open – **Search/Recalls**.
2. Select **Interval – 1 month**
Select Doctor – ALL
Select all reasons
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 **Update** (or Remove), then **Close**.
10. Post out letters and make appointments when patient rings.

The 'Patient recall' dialog box has three main sections: 'Select Interval' with '1 month' selected; 'Select Doctor' with 'ALL' selected; and 'Select Reasons' with 'Select all reasons' checked. There are 'OK' and 'Cancel' buttons at the bottom.

3

Patient returns to see doctor

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

4

Check outstanding actions (weekly)

1. No patient record open – **File 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 - click on **Delete** if no longer valid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

The 'Outstanding actions' dialog box shows a table with columns 'Action' and 'Date due'. One entry is 'Recall - BLOOD TEST' with '04/09/2003'. Below the table are buttons for 'Mark as performed', 'Delete from list', 'Add to list', and 'Close'.

Action	Date due
Recall - BLOOD TEST	04/09/2003



Medical Director – Recall Flowchart

