



MedicalDirector®
CLINICAL

Recalls, Reminders, Actions, and Outstanding Requests Fact Sheet

The RACGP Standard for General Practices (4th edition) defines a 'Recall' system as a system to ensure that patients receives further medical advice on matters of clinical significance.

The Recall and Reminders System is a core function in MedicalDirector Clinical. The tool is very useful when used correctly and maintained regularly.

This factsheet was created with the aim of aiding GPs and Practice Managers in utilising the Recall and Reminder system effectively and efficiently.

Contents

PART 1: Creating Effective Recall and Reminder Reasons	3
PART 2: Knowing when to use Actions, Recalls, or Reminders	4
Action Items	4
Recall Items.....	5
Reminder Items.....	5
PART 3: Following-up	6
A: Generating the Recall List	6
B: Tracking Recalls Marked as 'Urgent'	6
C: Update, Remove, or Cancel Recall Items	7
D: Following-Up Test Requests	8

PART 1: Creating Effective Recall and Reminder Reasons

A key factor in helping ensure an effective and manageable recall and reminder system is to create and define a clear and concise list of reasons. Ensure that staff members recognise the difference between a reminder and recall.

The RACGP Green Book (2nd edition) defines recalls and reminders as:

“**Reminders** are used to initiate prevention, before or during the patient visit. They can either be opportunistic or proactive. **Recalls** are proactive follow-up to a preventive or clinical activity.”

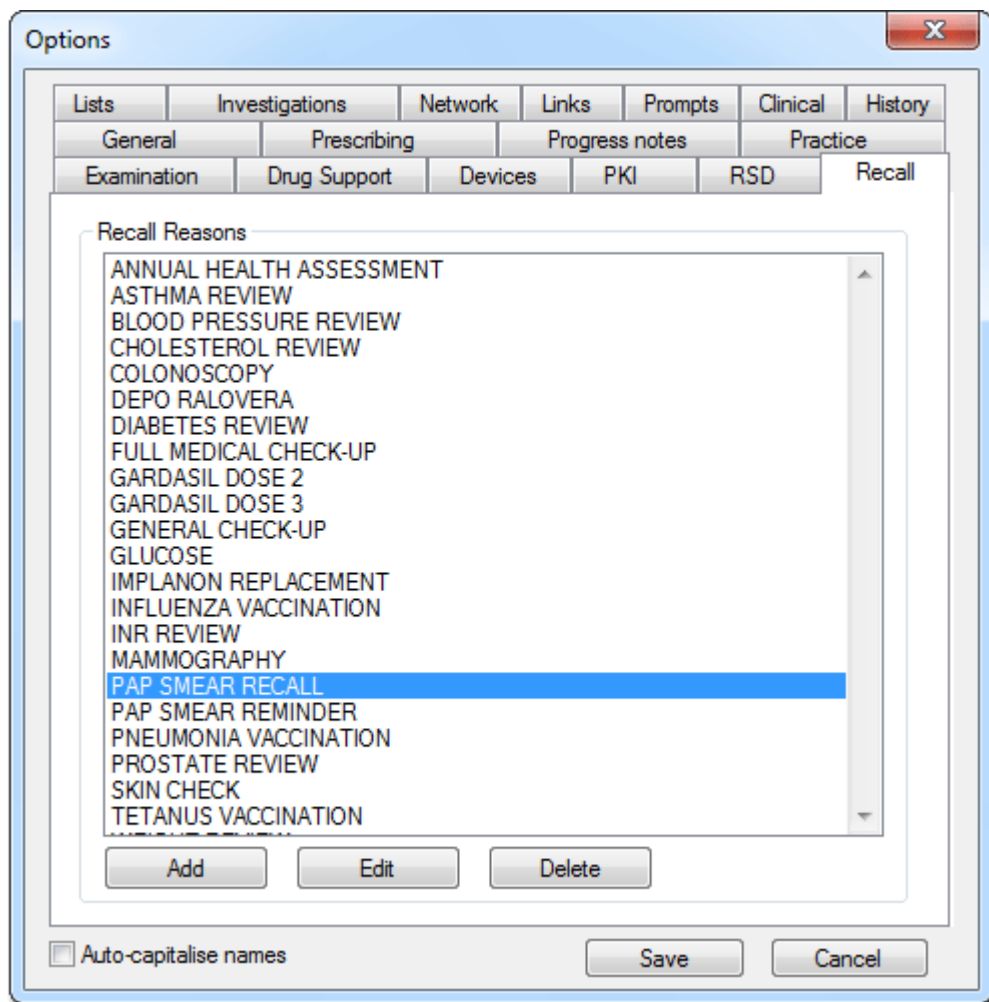
To do this:

1. From the main screen select **Tools > Options**.
2. Select the **Recall** tab.
3. Add, Edit, Delete to create an effective recall reason.

Tips: Some sites use an asterisk (*) to indicate a recall, whilst others clearly define it in the reason itself, as seen on the example below (PAP SMEAR **RECALL** and PAP SMEAR **REMINDER**)

Reasons found in this list are not limited to recalls and reminders; the list is also available for creating Action List items.

One way of fully utilising the reason list is to include “Review” or “Follow-Up” in the list – this enables the clinician to add these reasons in their Action Items and them for following-up test results.



PART 2: Knowing when to use Actions, Recalls, or Reminders

Action Items

Treat the 'Action List' feature in MedicalDirector Clinical like a reminder system. If there are any clinical items that need to be discussed with the patient such as reviewing weight and blood pressure, or referring them to a dietician, and, upon the patient's return a reminder is needed by the clinician, the 'Action List' is where this information needs to be stored.

When information is stored in the list, a pop-up reminder appears on-screen upon opening the patient's record.

To add to a specific patient's action list:

1. From the within the patient's clinical record, select the **Clinical menu > Action List**.
2. Click **Add**.
3. A list of pre-defined recall and reminders reasons will appear (as shown at right).
4. Select from the list or create a new one.
Note that adding a new reason here will not automatically add it to the main list of reasons and reminders.
5. Enter the **Action Due Date**.
6. Click the **Save** button.

Add Action to List

Doctor: Dr Sue Smith Action Due Date: 13/11/2014

Action description

BLOOD PRESSURE REVIEW

- ANNUAL HEALTH ASSESSMENT
- ASTHMA REVIEW
- BLOOD PRESSURE REVIEW**
- CHOLESTEROL REVIEW
- COLONOSCOPY
- DEPO RALOVERA
- DIABETES REVIEW
- FULL MEDICAL CHECK-UP
- GARDASIL DOSE 2

Save Cancel

If anything is due in the next 7 days, the 'Action List' appears upon opening the patient's record.

Outstanding Actions

Outstanding Actions for the Next 7 Days Show all actions

Date Due	Date Added	Doctor	Action
13/11/2014	13/11/2014	Dr Sue Smith	BLOOD PRESSURE REVIEW
14/11/2014	13/11/2014	Dr Sue Smith	DIABETES REVIEW
17/11/2014	13/11/2014	Dr Sue Smith	WEIGHT REVIEW

Add Delete Mark as performed Close

The Action List can also be used to remind clinicians and staff if they need to chase any test result. For example, you can use the Action List to add a reminder message for yourself to remind you to follow-up any Pathology or Imaging exams (for example) that you have requested.



Actions need to be marked as performed when the action is complete. This ensures that the list is kept clean and organised. For social reminders such as 'Thank patient for Christmas Card', click 'Delete'.

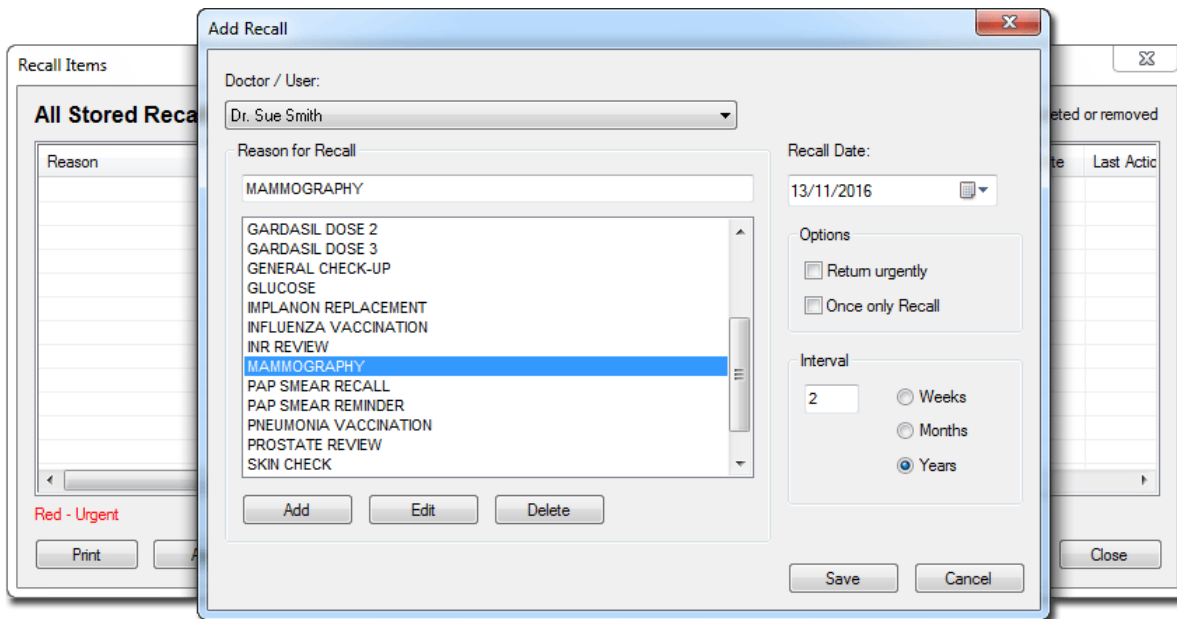
Note that once an action has been marked as complete, it is removed from the list.

Recall Items

If there is a clinically-significant request, or tests that need to be recorded or followed-up, this type of information needs to be added as a 'Recall'.

To add Recall items:

1. Open the patient's record.
2. Click the Recalls button.  If a patient already has a recall due, a ringing telephone icon appears beside the button. 
3. Choose the reason from the list. Unless the reason is new do not click 'Add'. Use discretion when clicking 'Add', as it means that the reason will be saved in the main list of Recall reasons, and hence can be seen by all users.



Please be mindful when clicking 'Return Urgently', as this may work differently for every patient. For example, it may be urgent for a 50-year old woman to return for mammography in 2 years' time, whilst for another patient it may be that it is very urgent that the patient returns the same week.

4. If the reminder is one-off, tick the **Once only Recall** option.
5. Click the **Save** button.

Reminder Items

Reminders are entered in the same way as recalls. Reminders are either opportunistic or proactive, as these reminders are targeted at patients who need to be prompted to have their test or shots taken.

PART 3: Following-up

There are several access points in MedicalDirector Clinical to follow-up on outstanding test results, referrals, and recalls.

Usually Admin Staff manage the recall and reminder system. A user may opt to print a list for the clinicians to check, or use mail merge and send said letters to the patients.

A: Generating the Recall List

The recall list is helpful in following a patient’s clinical progress; the list can be used to send out reminders to patients who are at risk (e.g. biennial recall for all women aged 50-59, due for a mammogram) or to target serious and urgent recalls (e.g. abnormal results).

To generate the Recall list:

1. From Main Screen select **Search > Recall**.
2. Select the reasons and intervals from the list.
3. Tick on any other criteria applicable to your search.
4. Click the **OK** button.
5. Urgent Recalls are shown in red. If you want to see **only** urgent recalls, tick the ‘Show Urgent Recalls’ box.

B: Tracking Recalls Marked as ‘Urgent’

It is advisable to print a list of urgent recalls every day, with all reasons selected. If a recall is marked as urgent, it is imperative that contact is made with the patient.

To track contact with the patient:

1. Select a Recall entry from the list.
2. Click the **Recall Actions** button.
3. Click the **Add** button.
4. Enter necessary information.

The screenshot shows the 'Recall Actions' window for patient Jennifer ANDREWS (DOB: 20/04/1970) with reason MAMMOGRAPHY. The window contains a table with columns 'Date Performed', 'Action Taken', and 'Performed By'. One entry is visible: 13/11/2014, Audit, Dr A P. Below the table are buttons for 'Print', 'Add', and 'Edit'. An 'Add Recall Action' dialog box is open in the foreground, containing the following fields:

- Performed By: Dr. Sue Smith
- Action Taken: Mobile Telephone
- Date: 13/11/2014
- Comment: 1st attempt: rang patient's mobile phone. No-one answered. Left a message asking patient to call back ASAP.

At the bottom of the dialog box are 'Save' and 'Close' buttons. The background window also has a 'Close' button at the bottom right.

5. Click the **Save** button.

Note: Any saved recall actions can be seen in the lower section of the Recall Items window.

The screenshot shows the 'Recall Items' window with the following data:

Recall Reason	Due Date	Date Added	Last Action Date	Last Action By	Last Action	Once On
BLOOD PRESSU...	5/09/2017	31/08/2016 1:22...	31/08/2016	Dr A Practitioner	Telephone Mobile	

Action Taken	Date Performed	Performed By	Contact Attempt	Comments	Date Deleted
Audit	31/08/2016	Dr A Practitioner	No	New recall: BLOOD PRESS...	
Telephone Mobile	31/08/2016	Dr A Practitioner	Yes	1st attempt. Rang patient's ...	

C: Update, Remove, or Cancel Recall Items

After making contact with patients, the user has three options regarding what to do with the recall list; Update, Remove, or Cancel.

- **Update** will delete any 'once-only' recalls and reset the dates for those that repeat. E.g. Current year is 2014 - a recall that occurs every 2 years will be reset to come up again in 2016.
- **Remove** will delete the recalls from appearing in future.
- **Cancel** will not do anything, and recalls will remain in the list with the same information.

The 'Update recalls' dialog box contains the following text and options:

Would you like to update these recalls?

Click on the 'Update' button to update all the displayed recalls by adding their recall interval to their due date.

Add recalls to action list

Click on the 'Remove' button to remove all the displayed recalls from the database.

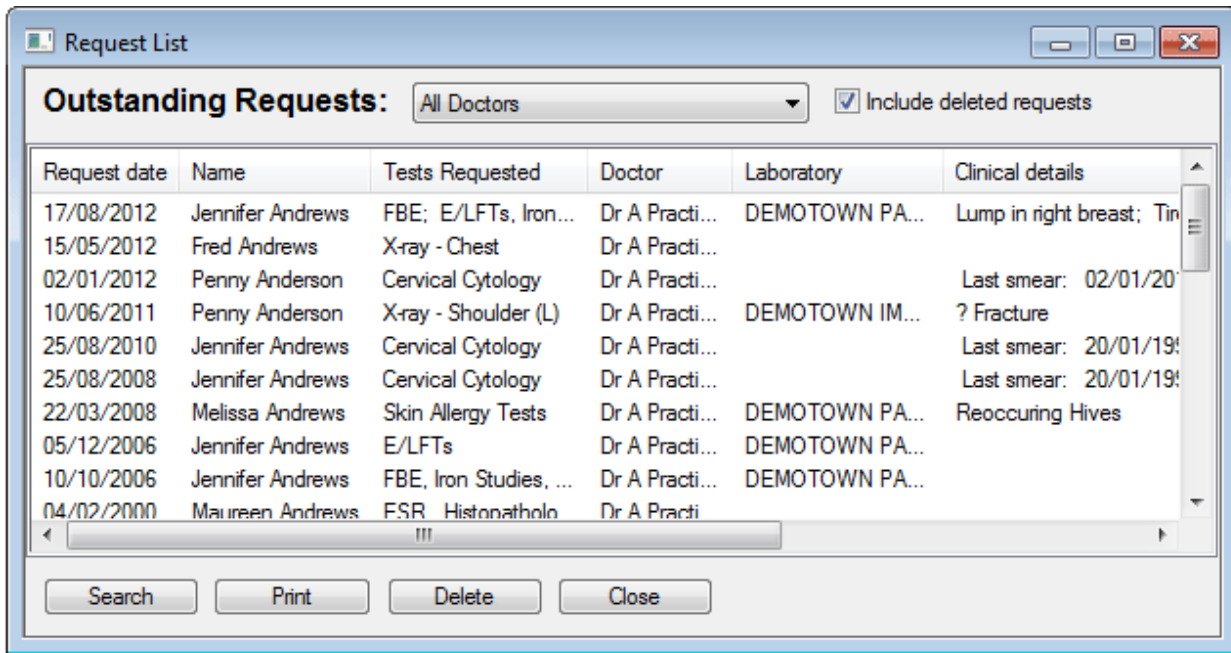
Click on the 'Cancel' button to leave all the displayed recalls in the database with their current recall date.

By ticking the **Add recalls to action list** check box, recalls are added to the Outstanding Action Item list and hence will come up each time the clinician opens the patient's record.

D: Following-Up Test Requests

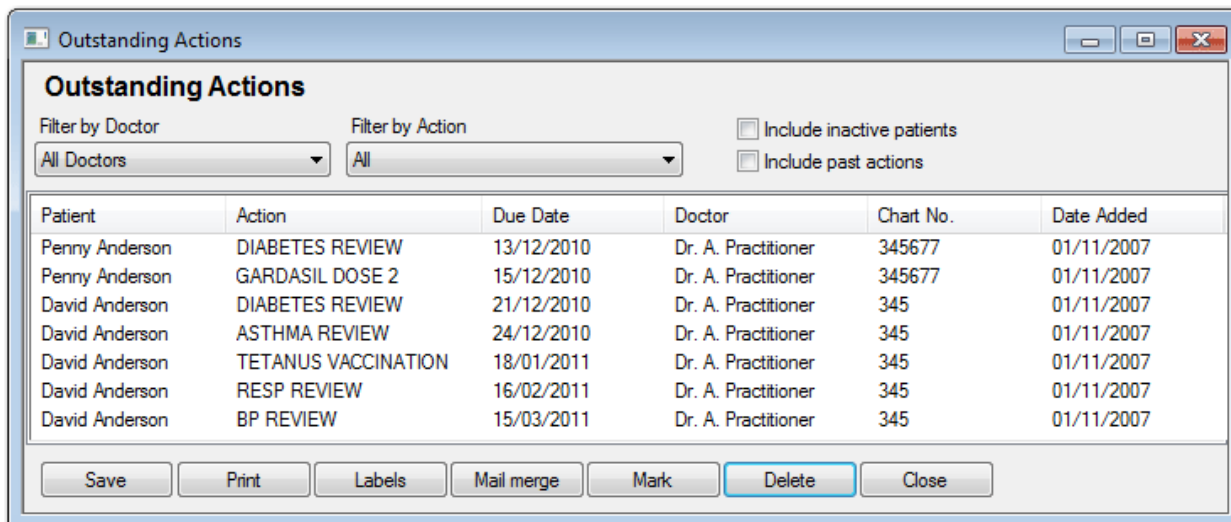
Using the Outstanding Request List

The list of outstanding requests can be found under **Correspondences > Outstanding Requests**. A user can print this list and follow-up accordingly.



Using the Action List

Aside from being able to view an Action List per-patient, a user can see *all* items that are not yet completed, by accessing the list from the main menu, by selecting **Clinical > Outstanding Actions**.



- As mentioned above, the Action List can also be used to remind clinicians and staff if they need to chase any test result.
- The list can be filtered by 'Clinician' or 'Action'. There is also the option to include inactive patients and past actions.
- Check the list regularly. Keep the list current by marking any completed items and deleting any duplication or past social reminder.

Using the Holding File

Test results can be received by the system electronically or manually. Test results are stored in the 'Holding File' area. Staff admin can import or scan test results and assign them to a patient and clinician. The clinician needs to review this list and, depending on the result, take action.

For example if a blood test result has come back for a patient and it indicates a dangerously high cholesterol level, the clinician should mark it as 'Return Urgently' and 'Add Recall'. In this way the result will show both in the patient record as a 'Recall' and also in the 'Recall List' for use by Administration staff.

From the main menu select **Correspondence > Check Holding File...**

Medical Director - [Holding File]

File Edit Patient Action Window Help

Preview - Full Hide Preview Clear Filters Move Location Document Details Scan Import Print Print List Delete Refresh

81 of 81 Records [Select All](#)

Date Collected	Date Requested	Patient	Subject	Recipient/Doctor	Sender/Provider	Location	Type
27/02/2013	27/02/2013	ANDREWS, Julie	PROTHROMBIN ORAL ANTIC...	DR A PRACTITIONER	Demotown Pathology	Result	Pat
20/02/2013	20/02/2013	ANDREWS, Julie	PROTHROMBIN ORAL ANTIC...	DR A PRACTITIONER	Demotown Pathology	Result	Pat
15/02/2013	15/02/2013	ANDERSON, David	E/LFT (MASTER)	DR A PRACTITIONER	Demotown Pathology	Result	Pat
15/02/2013	15/02/2013	ANDERSON, DAVID	LIPID STUDIES	DR A PRACTITIONER	Demotown Pathology	Result	Pat
13/02/2013	13/02/2013	ANDREWS, JULIE	PROTHROMBIN ORAL ANTIC...	DR A PRACTITIONER	Demotown Pathology	Result	Pat
6/02/2013	6/02/2013	ANDREWS, JULIE	PROTHROMBIN ORAL ANTIC...	DR A PRACTITIONER	Demotown Pathology	Result	Pat

Start Patient : Anderson, David
61 Wallace St, BUNDABERG QLD 4670
Birthdate: 04/01/1955 Age: Y58 Sex: Male
Telephone: 07 4152 5555

Your Reference :
Lab Reference : 84-4687074

E/LFT (MASTER)
Lab. Reference: 84-4687074-25T-0
Requested: 15/02/2013 Complete: Final
Performed: 15/02/2013
Demotown Pathology

Test	Value	Unit	Reference Range
E/LFT (MASTER)	138	mmol/L	(137-147)
Sodium	4.5	mmol/L	(3.5-5)
Serum Potassium	100	mmol/L	(96-109)
Chloride	30	mmol/L	(25-33)
Bicarbonate	13	mmol/L	(4-17)
Other Anions	5.5	mmol/L	(3-7)

Previous Next Assign Patient Assign Recipient Action No Action Discuss Return Urgently Add Recall Edit Patient Open Patient View Signature Close

Dr A Practitioner 08:59:45 AM

Some Options in the Holding File:

Action: Calls the Action window, and allows the user to assign certain actions such as 'Discuss', 'Return Urgently' and others. It can also be customised.

No Action: Click to indicate that no actions are required regarding the selected Result.

Discuss: Click to indicate that there is a need to discuss the result with the patient.

Return Urgently: Marks the selected item as 'Return Urgently'.

Add Recall: Click to create a Recall notification for the patient.

Note: To keep the Outstanding Request list clean and manageable, once the result is received in the Holding File, the request must be deleted from the Outstanding Request list. However, please note that a single request can hold several different requests.

Using the Actioned Items List

Once an item has been actioned i.e. a notation (Action, No Action, Discuss, Return Urgently or Add Recall) from Holding File, the item is moved to the 'Actioned Items' area. This can be accessed by selecting **Correspondence > Actioned Items**.

MedicalDirector Clinical - [Actioned Items]

File Patient Window Help

Preview - Full | Hide Preview | Clear Filters | Move Location | Document Details | Print | Print List | Delete | Refresh | Holding File

Showing Records for: All Records | 96 of 709 Records | Highlighted Columns are Filtered | Select All

Date Checked	Checked By	Date Collected	Date Requested	Patient	Subject	Chart No	Ho
26/06/2012	DR A PRACTITI...	25/06/2012	25/06/2012	ANDERSON...	Skin Allergy Tests		07
26/06/2012	DR A PRACTITIONER	25/06/2012	25/06/2012	ANDREWS, M...	PROTHROMBIN ORAL ANTICOAG		07
28/06/2012	DR A PRACTITIONER	27/06/2012	27/06/2012	ANDREWS, Julie	PROTHROMBIN ORAL ANTICOAG		07
29/06/2012	DR A PRACTITIONER	28/06/2012	28/06/2012	ANDREWS, Fred	PROTHROMBIN ORAL ANTICOAG		07
3/07/2012	DR A PRACTITIONER	2/07/2012	2/07/2012	ANDREWS, M...	PROTHROMBIN ORAL ANTICOAG		07
5/07/2012	DR A PRACTITIONER	4/07/2012	4/07/2012	ANDREWS, Julie	PROTHROMBIN ORAL ANTICOAG		07
6/07/2012	DR A PRACTITIONER	5/07/2012	5/07/2012	ANDREWS, Fred	PROTHROMBIN ORAL ANTICOAG		07

Start Patient : Andrews, Julie
 5 Jefferson Street, BUNDABERG QLD 4670
 Birthdate: 03/03/1936 Age: Y76 Sex: Female
 Telephone: 07 9434 6789

Your Reference :
 Lab Reference : 82-1385144

PROTHROMBIN ORAL ANTICOAG
 Lab. Reference: 82-1385144-INR-0
 Requested: 27/06/2012 Complete: Final
 Performed: 27/06/2012
 Demotown Pathology

Date	Lab No	PT	INR	Dosage	Reference: 82-1385144 INR Target 2.0 - 2.6
23/05/12	81-7852873	26	2.2	3.5 mg warfarin Saturday and 3 mg warfarin Sunday to Friday	
30/05/12	81-8554730	27	2.3	3.5 mg warfarin Saturday and 3 mg warfarin Sunday to Friday	
06/06/12	81-9205323	24	2.0	3.5 mg warfarin Saturday and 3 mg warfarin Sunday to Friday	
13/06/12	81-9947712	28	2.3	3.5 mg warfarin Saturday and 3 mg warfarin Sunday to Friday	
20/06/12	82-0615431	29	2.5	3.5 mg warfarin Saturday and	

Previous | Next | Reassign Patient | De-notify | Add Recall | Open Patient | View Signature | Audit History | Close

Similar to a recall list, a user can print a list of actioned items and use this list as a way to identify patients who need to be notified. Please note that only un-notified records will be printed.

Some Options in Actioned Items:

Notify: To indicate that the patient has been notified about the result, click **Notify**. If an error was made, the record can be un-notified.

Add Recall: The results can also be added to recall items, by clicking **Add Recall**.

Audit History: If there is a need to view the audit history of a particular item, click **Audit History**, and you will be presented with a list of actions performed on the item.

Action Date	Action By	Action	Action Detail
8/02/2013 8:05:00 AM	Dr A Practitioner	SDI	Import SDI by Dr A Practitioner
8/02/2013 9:05:00 AM	Dr A Practitioner	Assign Patient	Assigned to Fred Andrews
8/02/2013 9:10:00 AM	Dr A Practitioner	No Action	Notation: No Action, Comments: Dose is managed by Laboratory, Notated by Dr A Practitioner
8/02/2013 9:25:00 AM	Dr A Practitioner	Notified	Notified by Dr A Practitioner, Date:08 Feb 2013

Previous | Next | Reassign Patient | De-notify | Add Recall | Open Patient | View Signature | Close Audit History | Close