

Schedule recalls

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Create, record and schedule recalls for patients, and produce recall reports. Recalls start as Active and are set to Inactive when the patient attends, or if they do not respond to your recall requests. Recalls do not disappear, they remain as permanent contract records to confirm your efforts to recall the patient for a test that may be important to their future health.

Schedule recall reminders

You can schedule SMS recalls to go out at a specified time and a set number of days before the appointment.

The scheduled recall reminders feature is available in Zedmed v36.5 and later.

To administer recall reminders:

- 1. Go to Zedmed's Management tab.
- 2. Select Practice setup > SMS Configuration.

<u>Step 1 - Review / create the recall text.</u>

3. Select the Recall Reminders tab:

Recall Type - 'All' provides preconfigured text that can be used for all recalls.

- Select Add Message to create a new recall message for a specific recall type.
- Select an existing Recall Type if you want to edit its text.
- Use the Insert Merge field to add variables to new and existing recall messages.
- Reset to Zedmed Message will replace the current message with the standard All message text.

MS Configuration						×				
Appointment Reminders	Branch: Branch 1	~								
Appointment Schedule	Recall Type	call Type 1st Reminder Message				Insert Merge Field 🔻				
Recall Reminders	GP Management Plan - Review*	A 1st reminder that your <recall type=""> expires on <maturity date="">. Please call <clinic phone=""> to book an appointment with <dr name="">.</dr></clinic></maturity></recall>								
Recall Schedule Message Delay		1 message. 6 characters remainin								
		2nd Remind	fer Message	Reset To Zedmed Message	Insert Merge Field V					
		A 2nd reminder that your <recall type=""> expires on <maturity date="">. Please call <clinic phone=""> to book an appointment with <dr name="">.</dr></clinic></maturity></recall>								
		3rd Remind	er Message	1	Reset To Zedmed Message	Insert Merge Field V				
		A final reminder that your <recall type=""> expires on <maturity date="">. Please call <clinic phone=""> to book an appointment with <dr name="">.</dr></clinic></maturity></recall>								
		Messages I per additio above is an	onger than 160 characters m nal message). Note that this estimate based on the maxi	ay incurr adition size will include mum value for e	1 message al charges from your SMS pr the full value of any merge ach merge field)	e, 4 characters remaining rovider (typically once fields [the count				
	Reset All To Zedmed Message	dd Message	Delete Message							
						Close Cancel				

Step 2 - Schedule the recall to automatically send

- 4. Select the Recall Schedule tab.
- 5. Select the Add Schedule button.
- 6. Complete the following fields
 - a. Description enter a meaningful description for the schedule.
 - b. Active box enables the recall for scheduling. Select after you have finished getting up a new schedule.
 - c. Time sets the time of day the reminder will go out.
 - d. Reminder Type determines the order of reminders (ensures the times match the intended order).
 - e. To be sent sets how many days before the recall maturity the reminder will go out.
 - f. Recall Type determines what recalls will use this schedule by moving them into the Selected pane.

All recall maturity types in the **Selected** pane will receive the reminders.

7. Use the Message Delay tab to send recalls in batches.

This prevents recalls from going out at the same time. Enter a value in the **Delay** field, and that delay will be applied after each batch is sent.

8. Select **Close** to save and exit.

Editing schedules

When you select a recall **Description**, the schedule will appear in the **Edit Recall Schedule** where it can be edited.

intment Reminders Recall Sc	hedule Summary	Edit Recall Schedule				
Intment Reminders Recall Sc intment Schedule Active Intment Confirmation Reminders Schedule age Delay	hedule Summary Description First GP Management Plan Sect d GP Management Plan	Days Before Time 12 01: 10 02:	Time 01:30 pm 02:00 pm	Description First GP Management Plan Time 13:30 SMS Reminder Reminder Type First Second Subsequen To be sent 12 days before maturity Suppress reminder if an appointment exists within 2 days of maturity Recall Type Available Selected Mental Health Plan - Revin Team Care Arrangement Health Assessment*		gement Plan ond Subsequent days before maturity an appointment exists fays of maturity Selected GP Management Plan >>>
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The Recalls Report

This report is used to print the First Recall letter or the Reminder Letter, and to print a report for doctors to review prior to their letters going out. It can also be used to print first or subsequent reminder letters using MS Word. To learn more, see the Recalls Report guide.

Adding a recall

To add a Recall:

- 1. Open the patient's record.
- 2. Select the Recalls tab.
- 3. Select New.

The New Recall screen will open.

- 4. Select the **Doctor** initiating the recall.
- 5. Select the Recall Type.
- 6. Set the **Maturity Date** (which will usually default). The Letter date will automatically be set when you send recall letters.
- 7. Set a date if there is a Second Letter.
- 8. Select **Close** to save and exit.

When the patient attends, you should enter the date in the **Attendance Date** field and de-activate the entry. This may require some co-operation between the doctors and nurses in the practice and the clerical staff. Alternatively, the return of a pathology result form may be used to trigger the setting of the Attendance Date.

Zedmed recommends that you create a new record for a new recall – do not try to re-use the original recall by advancing the **Maturity Date**. This will cause your practice to lose its medico-legal record of the original recall.

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Patient Details	Shaw A		Deb	4						Sond Recall	2
Further Details	Show Active	New	Deta	illS							-
Recalls	Description	Created	Maturity Date	Doctor	Clinic	Status	Letter Date	Attd. Date	On Going	Notes	1
Notenad	Health Assessme	ent* 28/07/2021	31/08/2022	PD	MED				Y		
	Pap Test	14/09/2021	14/09/2022	PD	MED	1	14/09/2021		Y		
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Delete Print	t Patient Ver	ification	Find							Close	Cancel

Manual SMS Recalls

Clinics can manually SMS patients for recall reminders. Clinics can choose to either send SMS or letters for the first, second and subsequent rounds of reminders.

To send an SMS reminder:

- 1. Open Zedmed Office
- 2. Select Management.
- 3. Select Reports > Recall Report.
- 4. Select Send Recall via SMS.
- 5. Select Modify SMS Text to see the content of the text.
- 6. Select Send SMS.

	Recall Report	x	
Style Single Line Details Extra Details O Letter	Criteria Maturity Date 27/01/2023 € 24 Creation Date 28/12/2022 € 22 ✓ Modi	/02/2023 € □ /01/2023 € □ fy Recall SMS Message Text	– – X
Mail Merge Templates FRM Recall Letter.doc Send Recall via SMS First v Modify SMS Text	Overriding message for branch: MED Recall Type: All (this w SMS Message You have a Recall <due overdue=""> on <recall date=""> at <</recall></due>	ll replace the configured message for this session). Clinic Name>. Please ring <clinic phone=""> to make an</clinic>	appointment.
Data Group Doctor Order Patient Name Print Screen Deactivate these recalls	Maximum characters allowed by the SMS companies is 160. fee. Please note that spaces are counted as characters and Reset to Default Message Send SMS	If your message exceeds this limit, a second message I remember to allow for the potential length of each m Close	may be sent incurring a second lerge field used in the message. Close Cancel