

# 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.

SMS Configuration						×			
Appointment Reminders	Branch: Branch 1			~					
Appointment Schedule	Recall Type	1st Reminde	er Message		Reset To Zedmed Message	Insert Merge Field 🔻			
Recall Reminders	ders GP Management Plan - Review*		A 1st reminder that your <recall type=""> expires on <maturity date="">. Please call <clinic phone=""> to book ar appointment with <dr name="">.</dr></clinic></maturity></recall>						
Recall Schedule Message Delay		1 message, 6 characters remainin							
		2nd Remind	ler Message		Reset To Zedmed Message	Insert Merge Field 🔻			
		A 2nd reminder that your <recall type=""> expires on <maturity date="">. Please call <clinic phone=""> to book an appointment with <dr name="">. 1 message, 6 characters remaining</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>							
		1 message, 4 characters remaining Messages longer than 160 characters may incurr aditional charges from your SMS provider (typically once per additional message). Note that this size will include the full value of any merge fields (the count above is an estimate based on the maximum value for each merge field)							
	Reset All To Zedmed Message	dd Message	Delete Message						
	,					lose 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.

ntment Reminders Recall Se	thedule Summary	Edit Recall Schedule					
ntment Reminders Recall Sc ntment Schedule Active ntment Confirmation Reminders Schedule ge Delay	Active Description First GP Management Plan	Days Before 12 10		Description First GP Management Plan Time 13:30 SMS Reminder Reminder Type First Second Subsequent To be sent 12 days before maturity Suppress reminder if an appointment exists within days of maturity Recall Type Available Selected GP Management Plan Health Assessment* Selected GP Management Plan			
	Add	Schedule Delete Sched	Delete Schedule	le		<	

## 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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Acc Enquiry Attend	Bill Letters C	linical Informatio	n Print Q	uote Re	ceipt	Waiting	Room App	ointments E	xtras		
Patient Details	Show Active	✓ New	Deb	4.						Send Recall	2
Further Details	Active	New	Deta	llS							
Recalls	Description	Created	Maturity Date	Doctor	Clinic	Status	Letter Date	Attd. Date	On Going	Notes	
Notepad	Health Assessme				MED				Y		
	Pap Test		14/09/2022		MED	1	14/09/2021		Y		
eHealth	GP Management	Plar 27/09/2021	27/12/2021	PD	MED				Y		
Messages											
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		Doctor							V		
		Recall Type							~		
		Maturity Date	// 0				First L	etter			
		Attendance Da					Secon	d Letter			
		Acteridance ba									
		Recall Notes									
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		History						Close	Cancel		
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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.

	x						
Style       Single Line Details       Extra Details       Letter		SMS Message Text					
Mail Merge Templates     Overriding message for branch: MED Recall Type: All (this will replace the configured message for this session).       FRM Recall Letter.doc     SMS Message       Image: Send Recall via SMS     First       Image: Modify SMS Text     Modify SMS Text							
Data     Group     Doctor     V       Order     Patient Name     V       Print     Screen     Deactivate these recalls		ssage exceeds this limit, a second message may be sent incurring a second to allow for the potential length of each merge field used in the message. Close Cancel					