



Train IT Medical
Leading Your Practice Into The Digital Future



Recalls & Reminders using Bp Premier

Webinar

Presented by Katrina Otto, Train IT Medical

 **Bp Premier**



Our Learning Objectives:

1. Develop an understanding of systematic preventive health management.
2. Design an effective recall and reminder system.
3. Use actions for preventive health activities
4. Add, view and modify patient recalls and reminders
5. Generate patient recall and reminder lists.

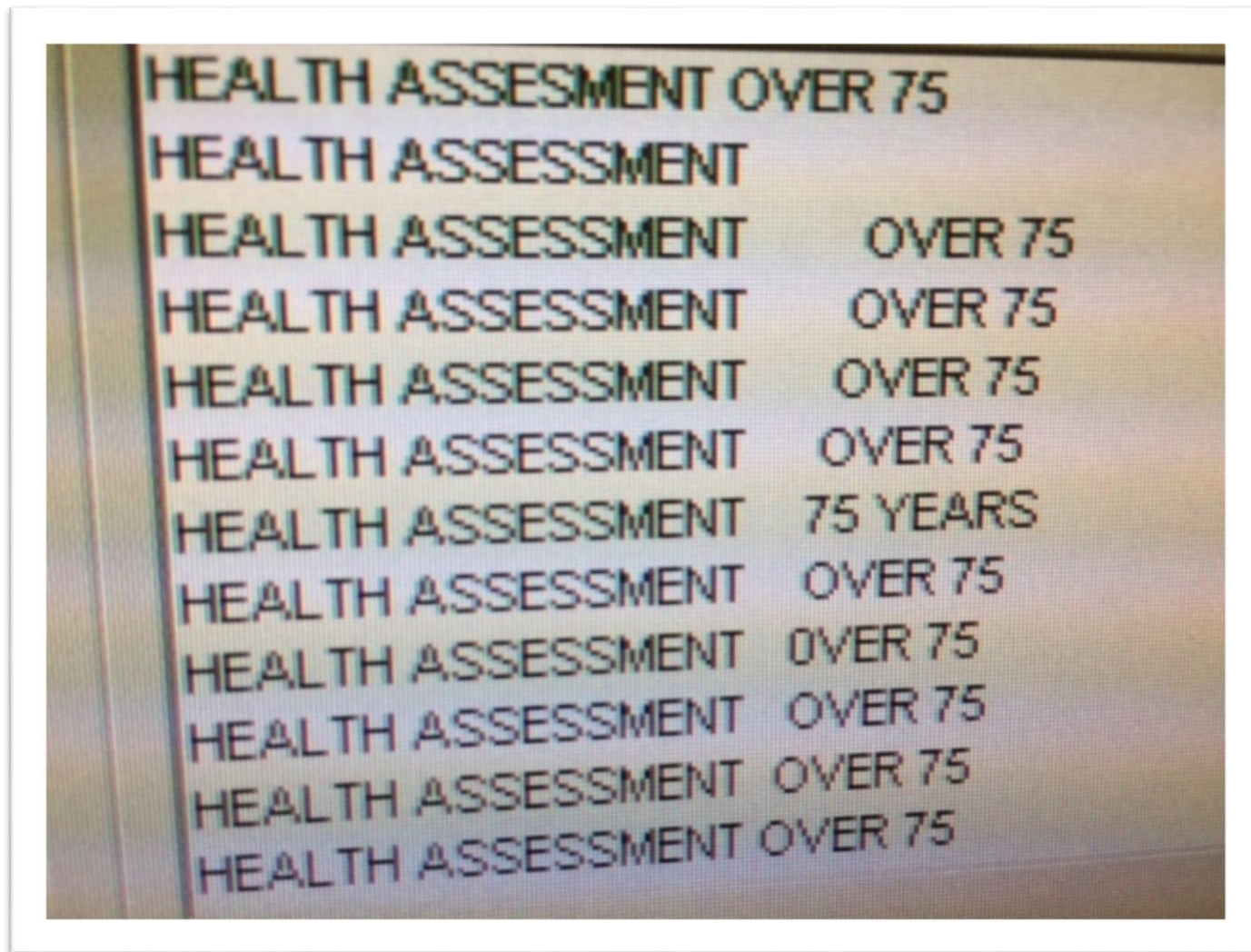
Systematic preventive health management



Practices need:

- Clear system
- Goals/Plan
- Defined roles
- Communication
- Training

What can happen without a 'system':



Actions, Recalls and Reminders

- **ACTIONS** eg. Discuss smoking
- **REMINDERS** eg. routine pap smear, mammogram
- **RECALLS**
eg inconclusive pap smear



How are these followed up? How often? How is that documented?

The RACGP Standards – ‘Clinical Significance’

The follow-up system needs to accommodate different levels of follow up depending on the patient’s needs and clinical significance of the case.

Consider the following factors to determine if a result is clinically significant and therefore requires action:

- **the probability that the patient will be harmed**
- **the likely seriousness of the harm**
- **the burden of taking steps to avoid the risk of harm.**

Systematic preventive health management



RACGP Standards

5th Standards Criterion

4.1 - Health promotion and preventive care

Indicator

- ▶ A. Our patients receive information on health promotion, illness prevention, and preventive care.

RACGP 5th standards (draft) Feb 2016

Preventative Health Reminders

“Whilst some information may be transferred to national state-based registers (e.g. PAP tests, immunisations) you need to remind patients when they need to have another screening, and **not rely on patients receiving reminders from these registries.**”



A systematic approach to preventive care

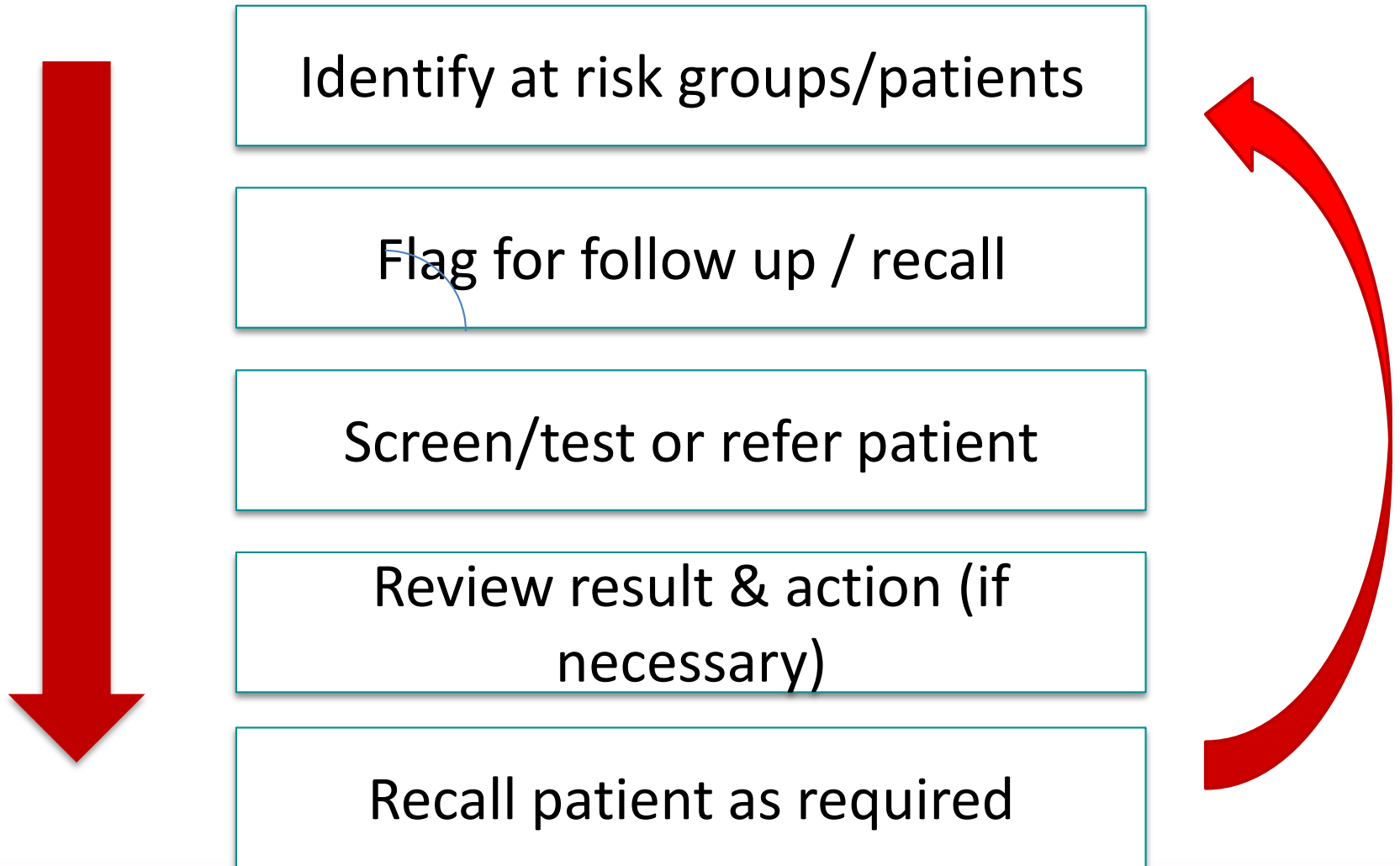
Adopting a **systematic** approach to health promotion and preventive care can include:

- conducting patient prevention surveys
- maintaining a disease register
- establishing a recall and reminder system
- maintaining a directory of local services that offer programs to help patients modify their lifestyle.



RACGP 5th standards (draft) Feb 2016

A documented protocol



2. Design a recall and reminder system

- ✓ Define *your* reminder list
- ✓ Decide required follow-up
- ✓ Apply a Team Approach



3. Use Actions for preventive health activities



A reminder for the clinician when the patient next presents. eg. discuss smoking, repeat BP etc.

If follow-up is required use 'Reminder' button instead.

Actions

The following actions have been entered for this patient: Include performed actions

Date due	Action	Entered by	Priority	Entry date
27/04/2017	Follow up request: E/LFTs	Dr A. Hodgers		27/04/2017
27/04/2017	Discuss pathology	Dr A. Hodgers	High	27/04/2017

Comment:

Outstanding action prompts appear on opening the patient record and can be tracked from the main screen (Clinical > Actions).

4. Add, view and modify patient recalls & reminders

Add from:

- patient record
- Inbox
- immunisations
- review screen

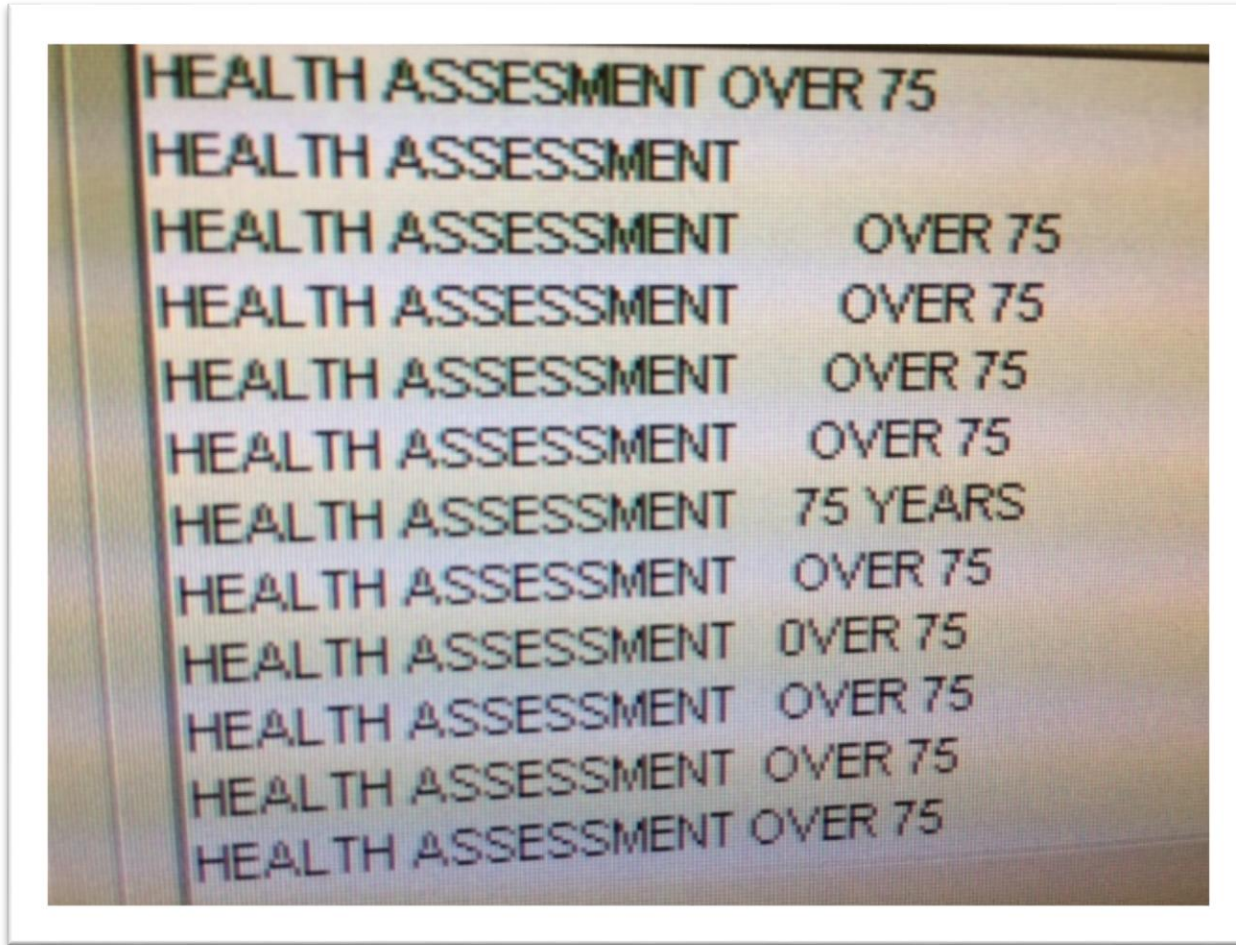


5. Generate Recalls and Reminders

- ✓ Define your system
- ✓ Keep the list tidy
- ✓ Label your reminders so patients don't stress if they receive a sms or letter with the reason.

```
COIL REMOVAL  
COLON  
COLONO  
COLONOSC  
COLONOSCO  
COLONOSCO  
COLONOSCOPE  
COLONOSCOPY  
COLONOSCOPY AND ENDOSCOPY  
COLONOSCOPY REPORT AND REVIEW  
COLONOSCOPY  
COLPOSCOPY
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Duplication makes it all harder



We need to minimize risk

COIL REMOVAL

COLON

COLONO

COLONOSC

COLONOSCO

COLONOSCOPI

COLONOSCOPE

COLONOSCOPY

COLONOSCOPY AND ENDOSCOPY

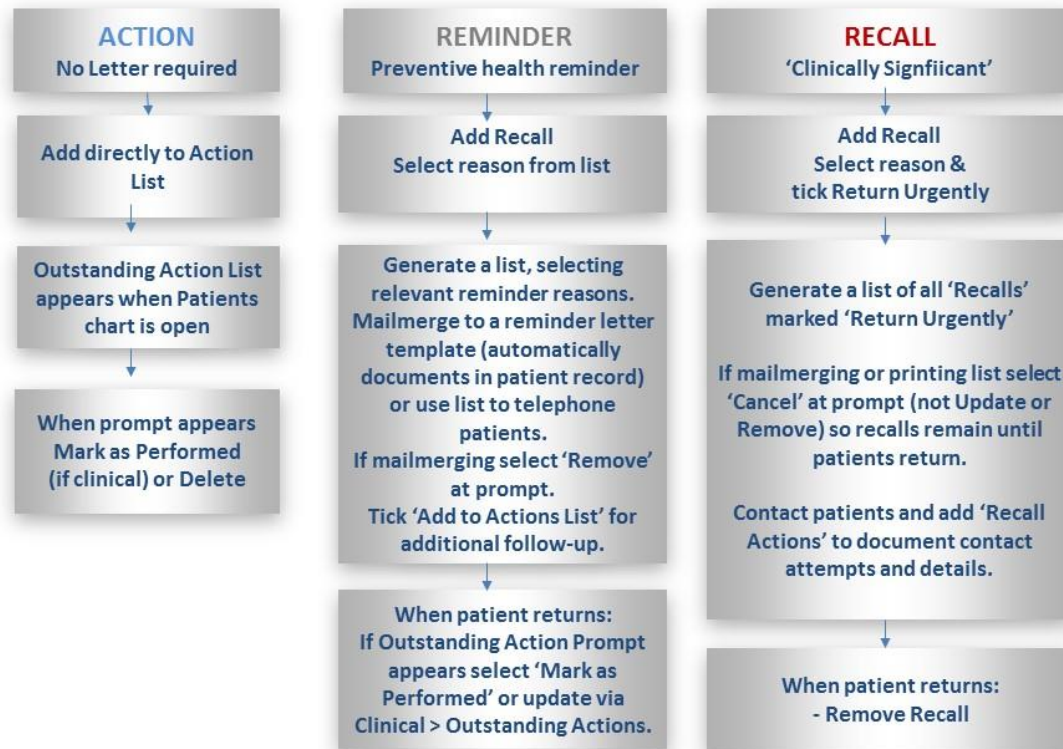
COLONOSCOPY REPORT AND REVIEW

COLONOSCOPY

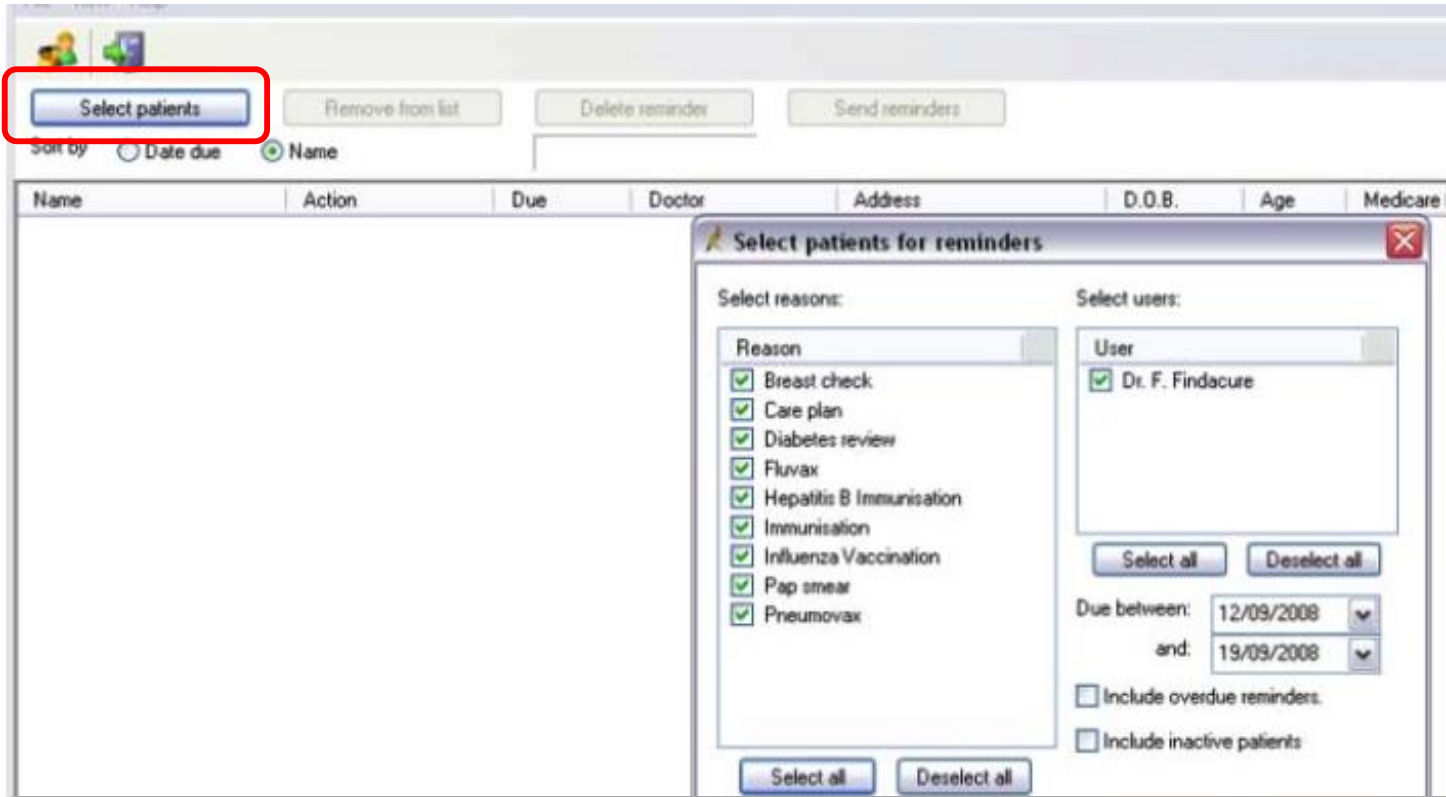
COLPOSCOPY

Actions, Recalls & Reminders

ACTIONS, REMINDERS & RECALLS



Send Reminders



Follow Up Recalls & Reminders

Previously sent reminders

File Help



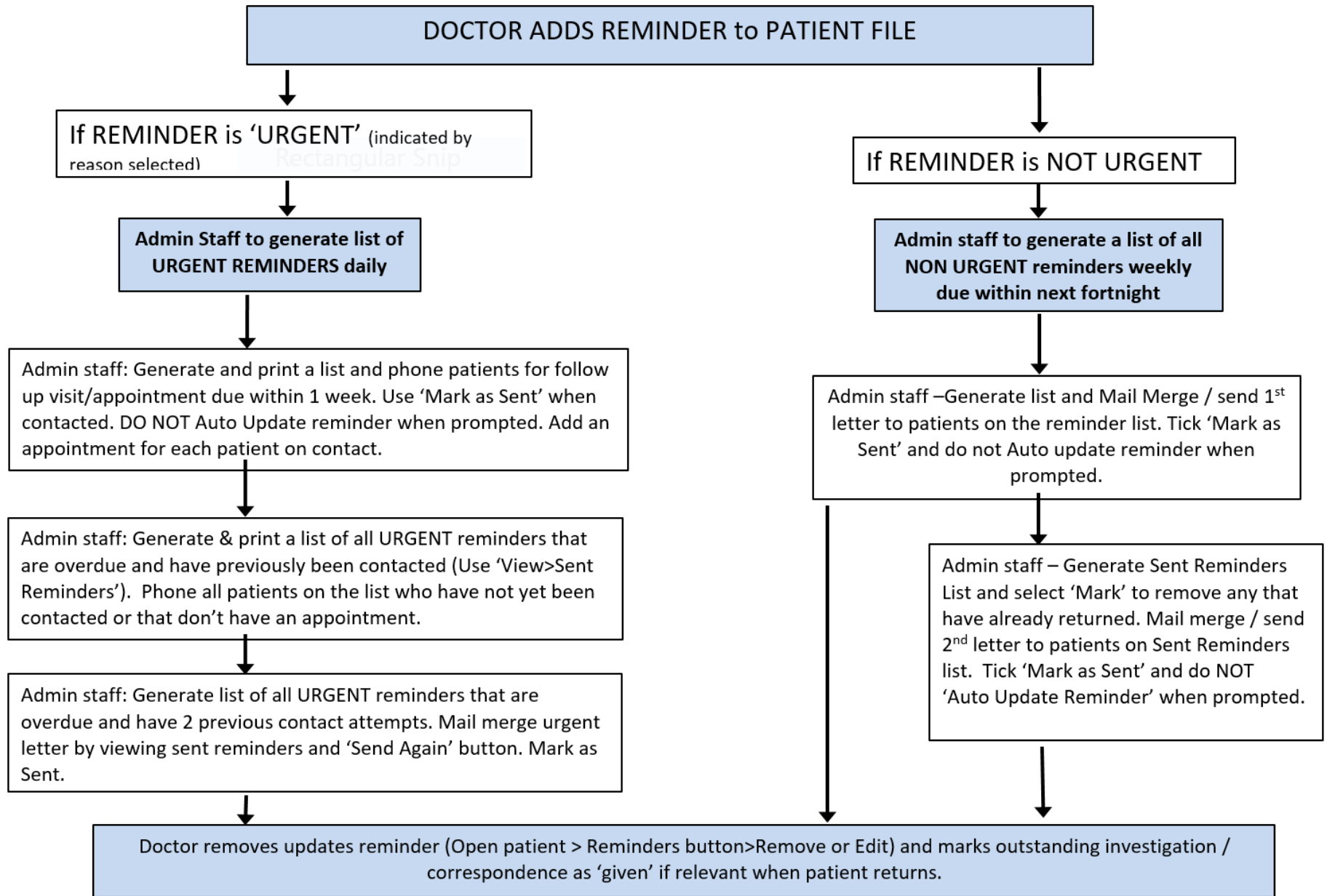
Show unactioned only Show all patients Include inactive patients Sent on or after: 10/08/2015 Sent on or before: 10/08/2016

By doctor: All By location: All Reason: All Mark **Send again**

Name	Reason	Doctor	Location	Sent	Sent as	Actioned
Abbott, Alan	Cholesterol check	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Abbott, Madeline Jane	Fluvax Immunisation	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Abbott, Madeline Jane	Care plan	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Ackeman, Ashley Francis	Care plan	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Alfreds, Gwenda Elizabeth	Care plan	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Allen, Janelle	Fluvax Immunisation	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Amos, Tegan	Care plan	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//
Bryant, Leonard	Care plan	Dr F. Findacure	Main surgery	05/08/2016	Mail merge	//

Use '**Send Again**' button to generate additional letters
Use '**Mark**' to flag the reminder as performed.

BEST PRACTICE – REMINDER MANAGEMENT PROTOCOL – SAMPLE 1



RECALLS

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.

I will remember to remove the recall. I will remember to remove the recall.



Reminders from the Inbox

Pathology Results

Radiology Results

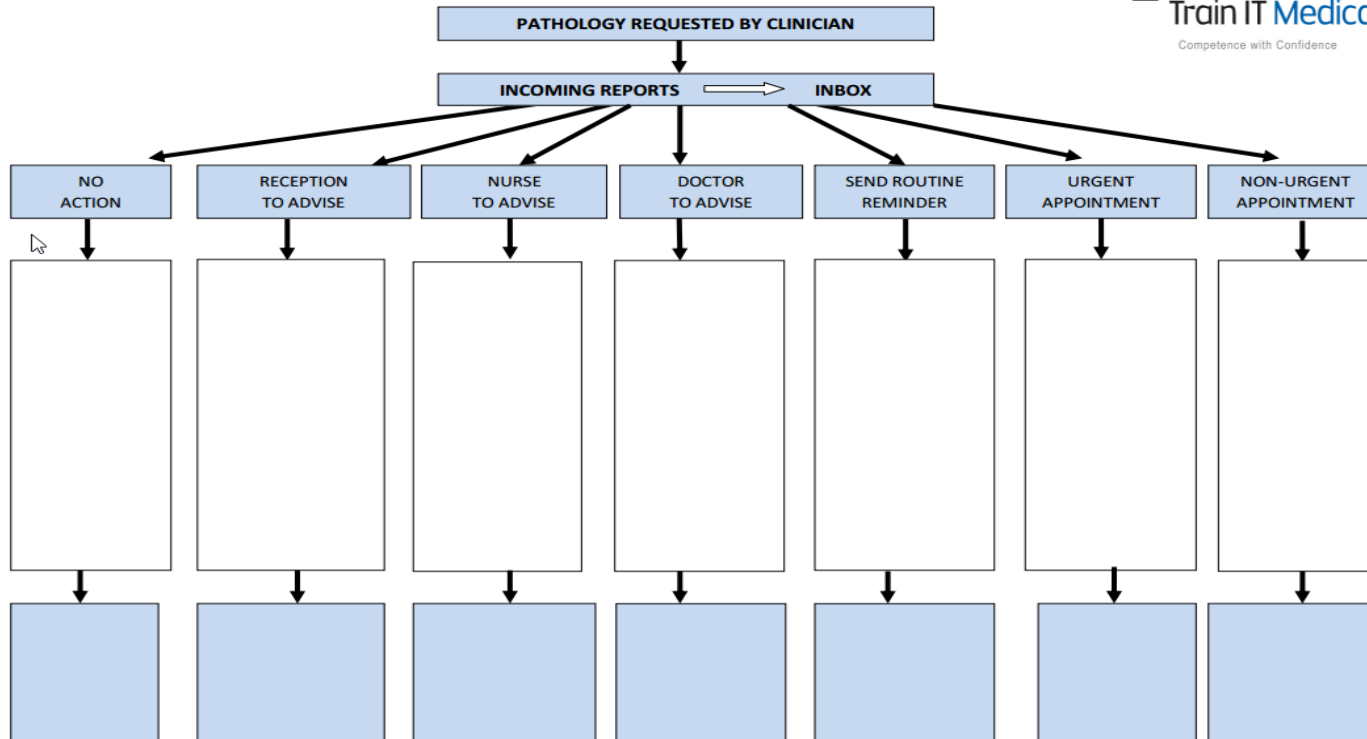
Specialist Letters

Discharge Summaries

Scanned documents

An effective practice system is vital

DESIGN YOUR PATHOLOGY PROTOCOL FOR BEST PRACTICE

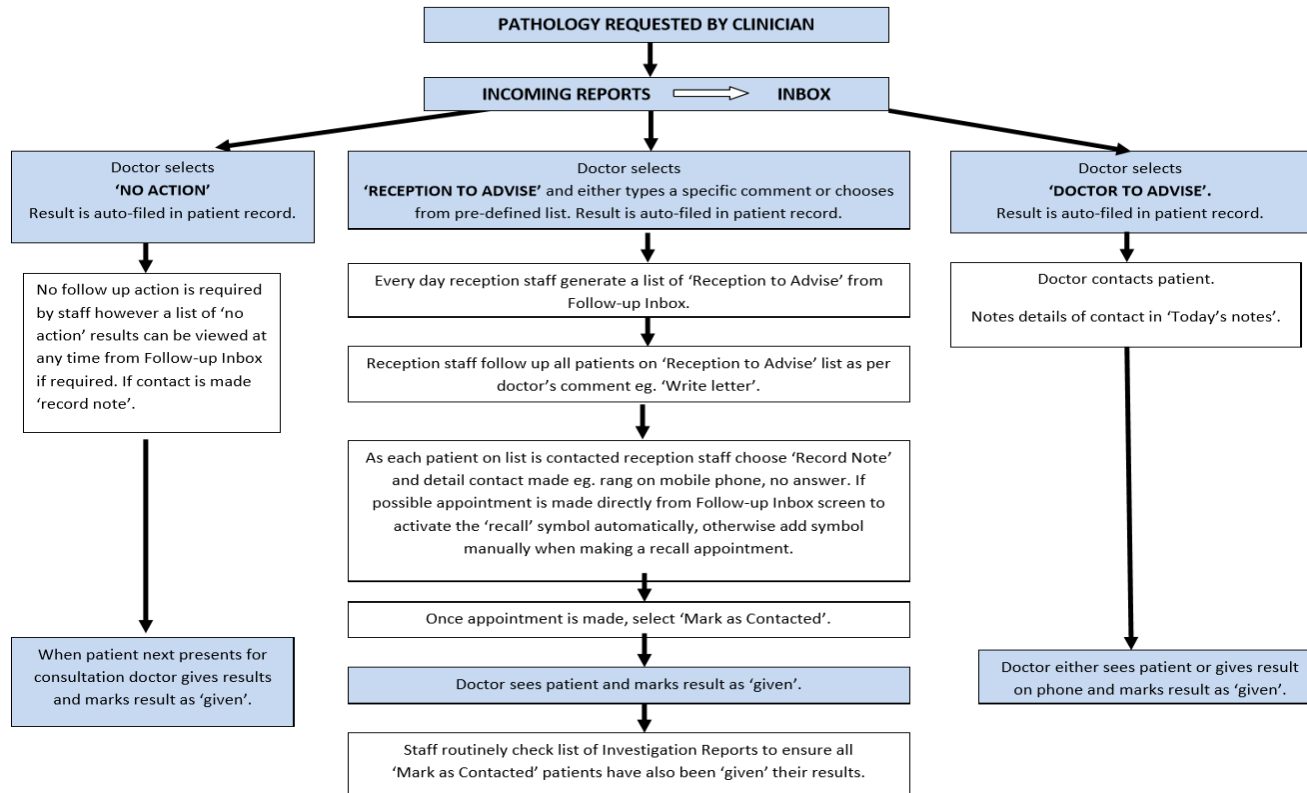


CREATE YOUR OWN

Download a blank flowchart here: <http://trainitmedical.com.au/manuals-free-downloads/bp-software-resources-free-templates>

An effective practice system is vital

SAMPLE ONLY



Download a blank flowchart here: <http://trainitmedical.com.au/manuals-free-downloads/bp-software-resources-free-templates>

Coming soon in Bp Premier

- SMS reminders
- Consent module
- Patient app – ‘Best Health’



[Download Train IT Medical ‘Results Management’ Presentation from Bp Summit 2017](#)

Further Information



- **RACGP – Putting Prevention into Practice (Green Book)** <http://www.racgp.org.au/your-practice/guidelines/greenbook/>
- **MedicalDirector – Recalls, Reminders, Actions Fact Sheet**
[http://medicaldirector.com/uploads/Recalls, Reminders, Actions, and Outstanding Requests Fact Sheet.pdf](http://medicaldirector.com/uploads/Recalls,_Reminders,_Actions,_and_Outstanding_Requests_Fact_Sheet.pdf)
- **AMA- Recall systems and patient consent** - <https://ama.com.au/position-statement/patient-follow-recall-and-reminder-systems-2013>
- **Avant – The Dos and Don'ts of patient sms** <http://www.avant.org.au/news/20160419-dos-and-donts-of-patient-sms-communication/>
- **Train IT Medical – Practice Management free resources –**
<http://trainitmedical.com.au/practice-management-free-resources>

Thank you from Katrina Otto

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Access more free practice resources
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