Creating A Recall Plan

Recall Plans are designed to automate the process of notifying your patients that it is time for another visit to the practice. Automating this process insures that patients are aware of the time frame in which to visit the practice for extended care.

1. Click on Master Files, Practice, Recall Plans
2. Right click or select the Norton button and select New
3. There are several criteria that may be set to determine the parameters of the Recall Plan:

Plan Name	Enter a descriptive name for the plan.
Appt Information	
Expected to return date	Identify the number of days until the patient's return. Enter that number. (For example, if the patient is to return for a one year visit, the days are 365.)
Default Event	Select the event from the menu
Default Resource	Select the resource, provider, from the menu
Default location	Select the location from the menu
Allow override	Click on this when you want the user to be able to override the event, resource or location.
Appointment Status	Select Kept, Scheduled, or None as the appointment status to discontinue a patient's participation in the plan.
Mailing Information	Select the name of the letter to be sent from the drop down list in the Letters field(s). To the right of this field, select the number of days after the plan is activated that the letter should be generated by using the up and down arrows. The letter days have to be in descending order. An error message is generated if they are not. For example, the first letter will be sent 45 days prior to the Expected to Return in 60 days, and the second letter may be sent in 45 days. Letter days have to be less than the Expected to Return Days. If mailing labels are to be generated instead of or in addition to the letter, then check the Mailing Labels box. This field works in conjunction with the day's prior fields in the Mailing Information section of the window

Example of a Recall Plan:

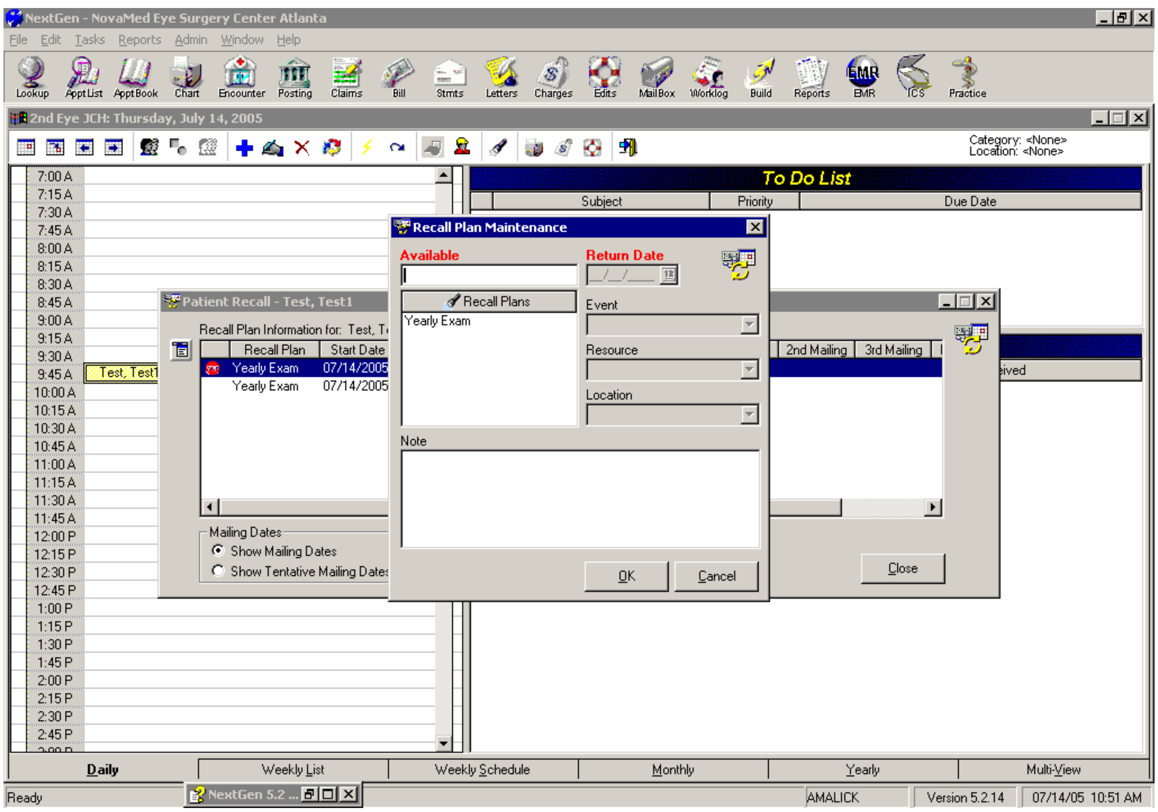
Patient is reminded to return to the practice for a one-year complete exam.

Plan Name	One Yr Complete
Expected to return date	365 days
Default Event	Complete exam
Default Resource	In this practice Patient does not have to see a specific resource
Default location	Practice has only one location so this is left blank.
Allow override	Turned on "Allow Override" option for event in case patient has had tests and been called in for a specific event
Appointment Status	Selected Kept. Do not want to discontinue plan unless certain that patient has been in the practice. Scheduled will only indicate that patient scheduled. Patient still may cancel or reschedule an appointment.
Mailing information	The first letter is Reminder 1 to be sent to the patient 60 days before the patient is due. Reminder 2 is set to go out at 45 days. For "send 3rd letter," no letter is selected because practice sends a unique letter. Mailing labels are checked and the date range is –15 days.

In this example, a patient who has a visit on May 1, 2004, and whose physician noted on the fee ticket that the patient is to return in one year for a complete exam, needs to be seen on or around May 1, 2005. On March 1, 2005, the patient receives a Reminder 1 letter. On March 15, the patient receives a second reminder. If the patient has not had an appointment by May 15, 2005, a special letter is sent out.

Activate a Recall Plan for an encounter:

1. Open the patient chart and select the encounter
2. Right-click and select the Recall option.
   The Recall Plan Maintenance window will appear.
3. Select the Recall Plan by double-clicking from the list displayed or enter the first few letters of the Plan in the Available field.
   The Return Date field is automatically filled in. The Return Date is calculated from the Expected to Return Days field on the Recall Plans window.
   The Event, Resource, and Location fields default from the Recall Plans window. If these fields were not checked to allow override, they display as grayed-out. If they were checked to allow override, the user may change the default setting. Click the drop-down arrow and make your selection.
4. Click OK.



Activate a Recall Plan for a New Patient:

1. Search for a patient using the Chart Icon on the Main Toolbar or select Tasks, Lookup, Chart
2. Select the patient (there will be a globe to the left of the patient's name)
3. Double click on the patient
4. Click on the chart button near the center at the bottom of the window
5. The message, "Confirm Create of Chart?" will appear. Answer OK.
6. When the Create Visit window appears, click on Cancel.
7. Select the Clinical History/Notes Tab
8. In the column to the right select Recall located under the history heading.
9. The standard recall window will open to the right with a white screen.
10. Right click in the white screen and select New.
11. Follow the instructions in item 2 – 4 of 'Activate a Recall Plan for an Encounter'

Contents of the Recall Window

1. Highlight a visit in either the Appointment Book or the Patient's Chart
2. Right click and select Recall
3. The Patient Recall Window will appear
4. The window will show the plans that are currently attached and any plans that have been stopped.
5. If "Show Mailing Dates" in the lower left hand corner has been checked, the dates on which the letters were actually printed will appear at the right. If the plan has ended, that date will appear.
6. If "Show Tentative Mailing Dates" is checked in the lower left hand corner, the dates on which the letters should be mailed are shown for each mailing.
7. The specific event if set in the plan will appear as well

Manually Remove a Recall Plan

1. Highlight a visit in either the Appointment Book or the Patient's Chart, Encounter tab.
2. Right Click and Select Recall
3. The Patient Recall Window will appear
4. Right Click on the correct Recall Plan and select STOP
5. A message asking, “Do you want to stop participation in this plan?” will appear
6. Answer, Yes, and a red Stop sign will appear in the far left column of the Patient Recall window.
7. Recall plans that have been stopped may not be reinstated.
8. A new recall plan may be added and it may be the same as the stopped plan but the dates will differ.

Editing an Existing Recall Plan

1. From the Menu Toolbar, click on Lists, select Master Files, Practice, and select Recall Plans. The Recall Plans List window will appear.
2. Highlight the desired recall plan, right click and select Open. The Recall Plans window will appear.
3. Make any necessary changes.
4. Click OK to close the Recall Plan window.
5. Click Close to exit the Recall Plan List window.

Printing Recall Mailing Labels

1. From the Menu Toolbar, select File, Print Forms, Letters, and Recall Letters. The Recall Letters window will appear.
2. Select the appropriate criteria for printing labels

If each location is printing recall labels, select the correct service location.

3. Click Find. All patients who are due a recall notice will appear.
4. Click the Mailing Labels button and the Print Labels window will appear.
5. Select the appropriate Address Sheet Label Template.
6. Select 'Start In Label Position' print range, Row 1, Column 1.

If using a partial sheet of labels, adjust the Row and Column fields accordingly.

7. Click Open File icon in the Printer Settings section and the Print Setup window will appear.
8. Select a printer to print labels.
9. Click OK to return to the Print Labels window. Notice the printer setting.
10. Load sheet labels into the printer label side down.
11. Click OK and the labels will be printed. When label printing is complete, you will return to the Recall Letters window.
12. Click on the Update Dates button to allow the system to update these patient recall plans to the next mailing date.
13. Click Close to exit the Recall Letters window.