Patient Recalls

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Overview

Recalls are used as a reminder to follow up with a patient for a future review appointment. For example, a patient is treated for a cancerous lesion and at a point, in the future, the clinic is required to follow up with the patient for a review appointment.

Please refer to Assessments and Reports for refreshing the concepts.

Example Business Requirements around Recalls

1. The users need to be able to record that recall is requiring on a certain date.
2. The user needs to be able to run a report giving all recalls due within a time period
3. The user needs to be able to record that they have contracted, or attempted to contact the patient
4. The user needs to record the outcome of the contract
5. The user needs to be able to close off the recall when

- The patient has been contracted and an appointment has been booked
- The patient has been contacted and the patient has refused a further appointment
- All reasonable measures have been taken to contact the patient but they have been unsuccessful

CareRight Workflow for Recalls

1. **Create a new recall for a patient:**
    a. Add the Recalls assessment (forms) to a patient,
        i. Click any **patient** > **show** > click **assessment** from the left list>click **New** on the top >In the search bar type **recall** > Find **REC - Recalls** > Click **Perform**
        ii. Below is the recall details table
        iii.

Recall details	Description
Date of recall	Choose the date of performing a recall
Recall type	Select from the drop-down list
Patient details	
Show patient details	Tick this box if you want to show the information from the patients
Referral details	
Show referral details	Tick this box if you want to show the information from the referrals
Call 1	
Call 1 : date of call	Choose the specific date when you made the call

Call 1 : comments	Make comments on the call you made
Status	
Status	Select the five statuses from the drop down list

b. The assessment (forms) needs to be Saved but not approved - effectively kept "open".

c. Only once all action has been completed should the assessment (forms) be Approved.

2. Check for all Recalls for a time period, contact patients, and record outcomes:

a. Run the "Recalls - Active" report for a time period.

b. Use this report to generate a list of patients requiring a recall.

    i. To Run: Click Reports > "Recall Report - Active" LOAD

c. You must enter dates into the filters below or you will get an error:

    i. Recall Date is on or after = dd/mm/yyyy e.g. 01/12/2017.

    ii. Recall Date is on or before = dd/mm/yyyy e.g. 14/12/2017.

d. Unapproved and Unarchived assessments (forms) appear in the report -these are considered active.

e. Print the Report or work from the PDF (different export formats are available - contact your system administrator to discuss).

3. Contact the patient(s)

a. For each **patient** on the list, open CareRight in a new tab and search for the patient by MRN.

b. Click **Show** and in their Patient record Click **Assessments - Search for REC recalls -** Click **Perform**

c. Add the call details - when Call 1 details are filled in, Call 2 details will appear, and then Call 3 details.

d. If you have called and left a message, you can optionally add a Notice called Recall to the patient record with details for other users to see.

e. If further action is required - Save and continue to keep the recall open.

f. If no further action requires and the recall can be closed:

    i. Select a Status from the picklist.

    ii. Fill in any additional fields.

    iii. Click **Approve**.

    iv. Repeat the above steps until you mark the recall as closed or successful.