Workflow

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> This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

- Example Business Requirements around Recalls (your organisation's may differ):
- The user needs to be able to record that a recall is required on a certain date.
- The user needs to be able to run a report giving all recalls due within a time period.
- The user needs to be able to record that they have contacted, or attempted to contact the patient.
- The user needs to record the outcome of the contact.
- The user needs to be able to close off the recall when:
    - The patient has been contacted 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

Workflow in CareRight to achieve the requirements above:

A: Create a new recall for a patient:

1. Add the Recalls assessment to a patient - Assessment > New > Recalls > Perform.
2. The assessment needs to be Saved but not approved - effectively kept "open."
3. Only once all action has been completed should the assessment be Approved.

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

1. Run the "Recalls - Active" report for a time period
    a. Use this report to generate a list of patients requiring a recall

    b. To Run: Click Reports > "Recall Report - Active" LOAD
    c. You must enter dates into the filters below or you will get a error:
    d. Recall Date is on or after = dd/mm/yyyy e.g. 01/12/2017
    e. Recall Date is on or before = dd/mm/yyyy e.g. 14/12/2017
    f. *Unapproved* and *Unarchived* assessments appear in the report -these are considered active
    g. Print the Report or work from the PDF (different export formats are available - contact your system administrator to discuss)
2. Contact the patient(s)
3. For each patient on the list, open CareRight in a new tab and search for the patient by MRN
4. Click Show and in their Patient record Click Assessments > Recalls assessment - Continue
5. Add the call details - when Call 1 details are filled in, Call 2 details will appear, and then Call 3 details
6. If you have called and left a message, you can optionally add an **Notice** called *Recall* to the patient record with details for other users to see
7. If further action is required - Save and continue to keep the recall open
8. If no further action require and the recall can be closed:
    a. Select a Status from the pick list
    b. Fill in any additional fields
    c. Click Approve
9. Repeat 1-7 until you mark the recall as closed or successful