2023

SystmOne Recalls

USER GUIDE

PRIMARY CARE SYSTEMS TEAM

Contents

Introduction

This user guide is aimed at providing staff with an understanding of managing Recalls within SystmOne. Staff will still require specific role-based training and this is highly recommended.

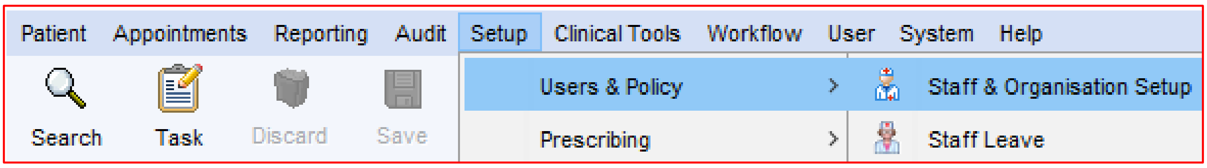
It is the legal responsibility to protect patient confidentiality. The responsibility for safeguarding and using confidential information appropriately rests with each organisation.

Recalls can be used to manage patients who need to be reviewed or require follow-up.
Examples include smear tests, breast screening, annual long term condition reviews, and QOF monitoring. Some patients will already be monitored by another service, but creating a recall adds a ‘safety net’ to ensure patients are not lost to follow-up.

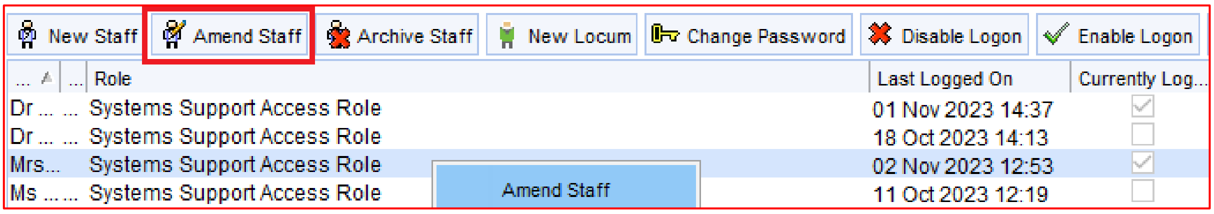
Users must have the SystmOne Administration 'Template Manager' Local Access Right to be able to manage recalls.

To view the Staff & Organisation Setup screen, from the **Main Menu**, navigate to **Setup**>**Users & Policy**>**Staff & Organisation Setup**

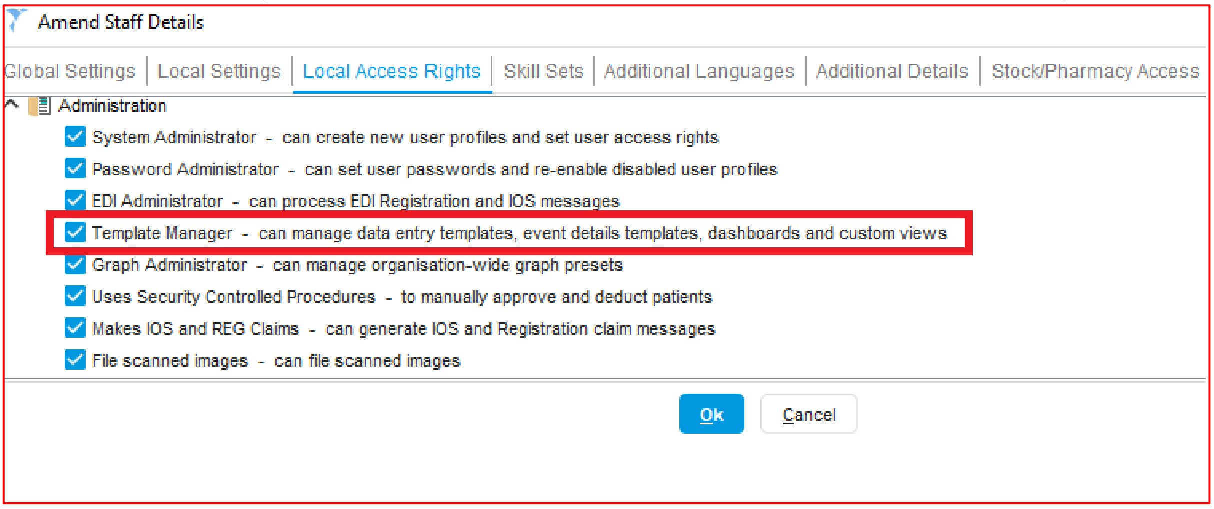
System Administrators can use this screen to manage staff details.



Select the staff member from the list. Right click or click on the **Amend staff** tab



Select **Local Access Rights** and scroll to **Administration** to view and amend local access rights

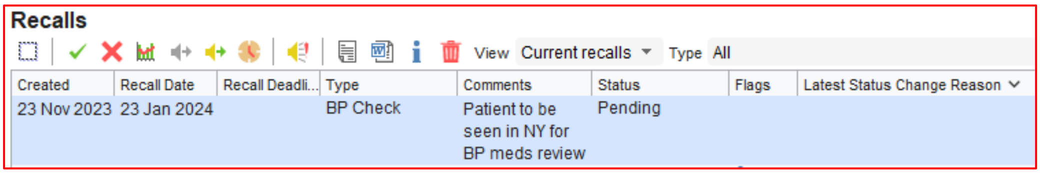


Managing Patient Recalls

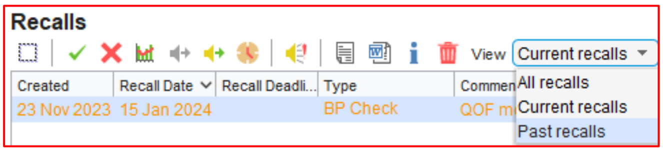
Viewing recalls in a patient record

- Retrieve the patient record
- Click on the **Recalls** node of the clinical tree

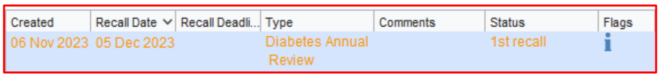
The Recalls viewing pane will look like similar to this, showing the date that the Recall was Created, The Recall Date (Due date), Recall Deadline (if this option has been added when creating the Recall Template), Comments, and Flags. Latest Status Change Reason is unlikely to be configured for your practice



- To change the view to show past or all recalls, use the filter drop down



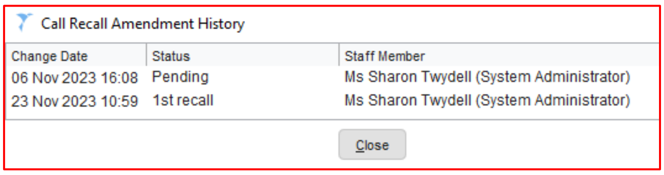
- A recall that is due in the next 60 days will have a flag



The colour of a recall will change according to its status:

- **Red** – indicates an overdue recall, i.e. a recall that has not been completed or cancelled and whose due date has passed
- **Orange** – indicates a recall that has a pending date within two months
- **Black** – indicates a recall that has a pending date of over two months away
- **Grey** – indicates a completed or cancelled recall (Past Recalls)

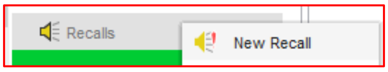
- To view the Recall Amendment History, right click and click on **View Full Amendment History**

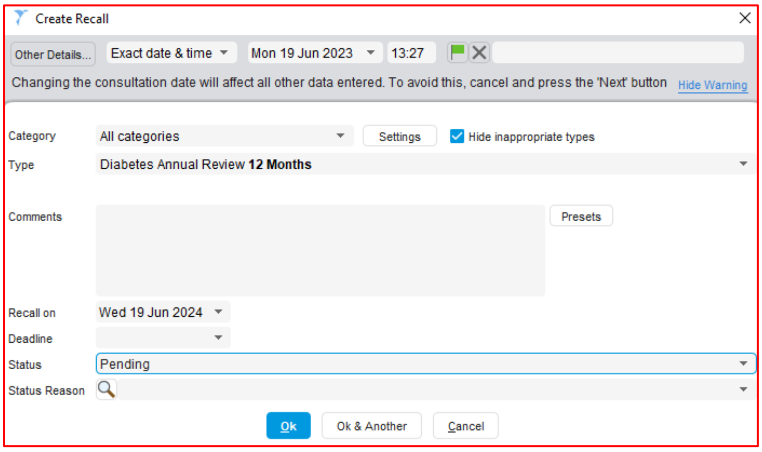


Adding a recall to an individual patient record

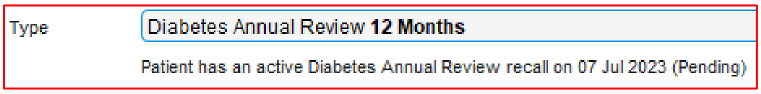
- Click on the **Recalls** node of the clinical tree and right click and select **New Recall**

- or click on the **New Recall Icon** at the top of the Recalls View





- **Category:** Leave this as 'All categories' to see all recalls, or click the dropdown to select a specific category
- Select the relevant recall **Type** from the drop-down list (If the patient already has an active recall of the same type, details are displayed above the Comments field



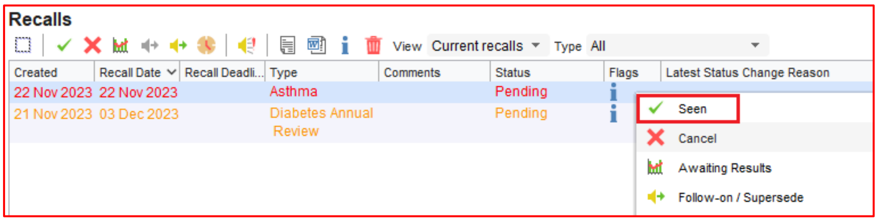
- To exclude any recalls where the age and gender of the recall have been defined as not applicable to your current patient, tick **Hide inappropriate types**
- Type any notes in the **Comments** field, e.g. reason for recalling this patient
- Specify a date for **Recall on** (this will pre-populate if the Recall Type has been created with a default recall period)
- Set a **Deadline** if this recall date must be completed in a certain timescale. For most recalls, this can be left blank
- Select the initial recall **Status** from the dropdown list. Almost all new recalls will be 'Pending' (waiting to be followed-up)
- **Status Reason** is unlikely to be configured for your practice, so you can leave this blank
- Click **OK**
- Click the **Save** button 

 on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

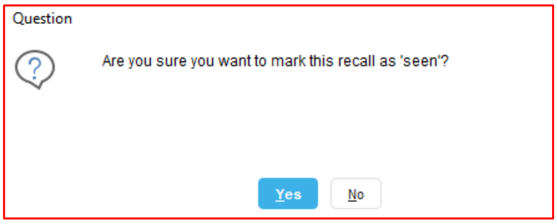
Managing Patients who have been seen

If a patient has been seen and no further follow-up is needed:

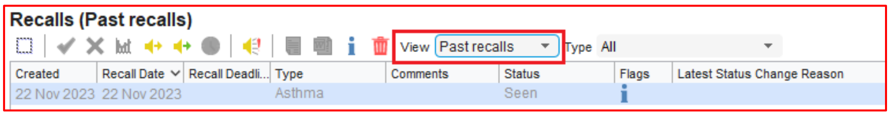
- From the **Recalls screen** in the patient record, right click on the appropriate recall and select **Seen**



- or click on the **Seen** button on the Recalls view 
- This message is displayed, to confirm your action



- Click **Yes**
- The recall will no longer show on this **Current Recalls** View
- To change the filter to show **Past Recalls,** use the drop-down option. The recall will now show in grey as Seen

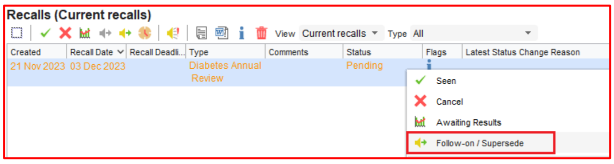


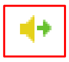
- Click the **Save** button 

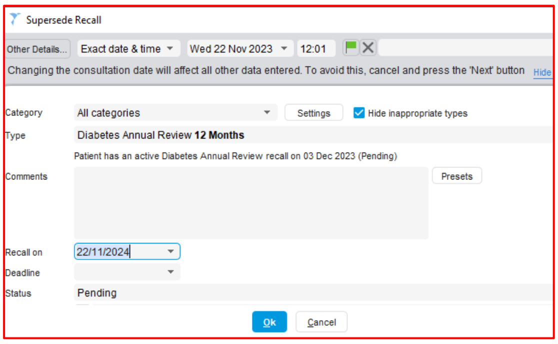
on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

If for example, a patient has been seen for an annual review, you will need to make sure that you carry the recall forward to recall them next year:

- From the **Recalls screen** in the patient record, right click on the appropriate recall and select **Follow on/Supersede**



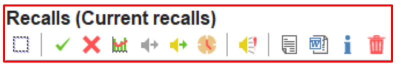
- or click on the **Follow on/Supersede** button on the Recalls view 
- The **Supersede Recall** window will appear

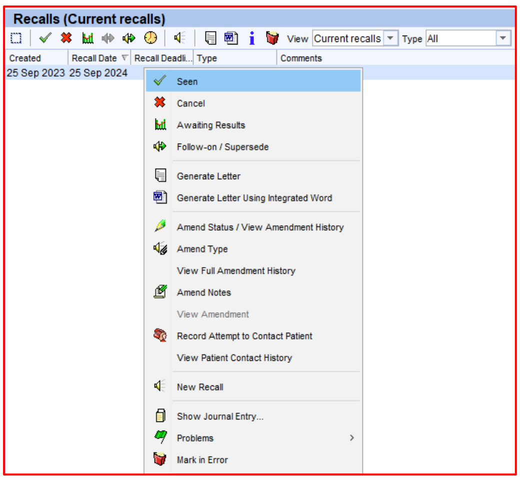


- If the Recall Type has a Default Recall period, this will automatically calculate, as shown above for one year on from the day it was superseded. You can change the date if required
- Click **OK**
- Click the **Save** button 

on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

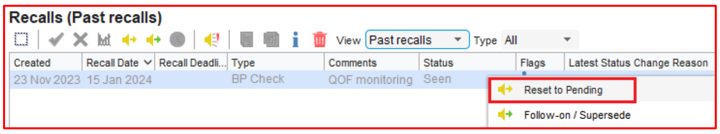
There are some other actions available on the **Recalls View** Tool Bar Buttons, and by right clicking from the **Recalls** list





If a recall has been cancelled in error this can be rectified

- From the **Past Recalls View,** you can **Reset to Pending** by using the right click. This will reset to the original **Recall Date.** You can amend the date if required

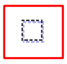
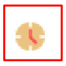


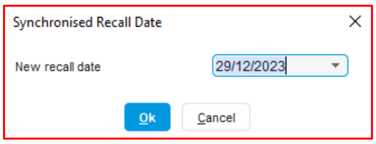
- If a recall has been marked as **Seen** and the patient requires follow-up, you can **Follow-on/Supersede** by using the right click to Follow Up the Recall. If there is a default recall period, it will automatically set the date for that period of time from today. You can amend this if needed
- Click the **Save** button  on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

Synchronising Recall Dates

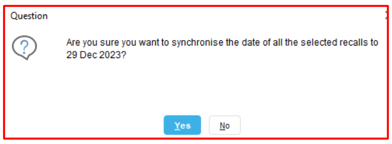
If a patient has multiple recalls, you may wish to set the same date for them all, to minimise the number of times a patient has to come in to the surgery

To change a number of recalls so that they all have the same recall date:

- Retrieve the patient record
- Click on the **Recalls** node of the clinical tree
- Click the icon  to select all
- Click the icon 
- Type the date you want to apply to the recalls you selected



- Click Ok
- A message is displayed to check that you want to go ahead



The selected recalls are superseded

- Click the **Save** button  on the **Main Menu** when you have finished working in the patient record, to save the changes you have made

Adding Recalls to Multiple Patient Records (From a Clinical Report)

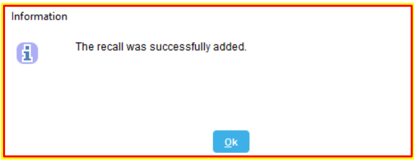
It is possible to add the same recall to more than one patient record at a time from a patient list generated by a Clinical Report

- From the **Main Menu**, navigate to **Reporting**>**Clinical Reporting** Clinical Reporting
- Select your chosen report and run the report by clicking the icon
- Show the patients in the selected report by clicking the icon
- Select the appropriate patients, either:
  - Click the icon to highlight the list on the screen, or
  - Hold down the **Ctrl** key and click on each appropriate patient, or
  - Click on the first patient in a range, hold down the **Shift key** and click on the last patient in the range, or
  - Click and drag over the entries to select them

When you have selected the patients to whose records you want to add the recall:

- Click the **Add Recall** icon in the toolbar above the patient list, or right-click and select **Actions** Actions >**Add Recall** Add Recall
- Select the **Recall type** from the drop down list and type in any **Comments** for the recall
- Specify a date for **Recall on**
- Select the appropriate **Initial status** from the drop down list
- Click **Ok**

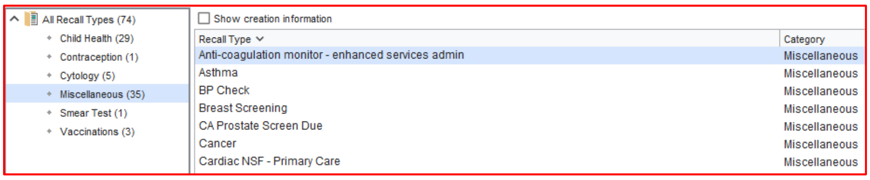
A message is displayed to let you know that the recall has been successfully added to the selected patient records



Managing Recall Types

The Recall Types screen

- From the **Main Menu**, navigate to **Setup**>**Data Entry**>**Recall Types**
- The Recall Types Tree in the left-hand pane will display all the recall types currently active in your organisation. Some of these will be ones published nationally in SystmOne, some may be created and published by NWL, and some may have been created in your practice
- You can view the available Recall Types within each category, by clicking on the **Category Folder/Node**, which will display the selected list in the right-hand pane

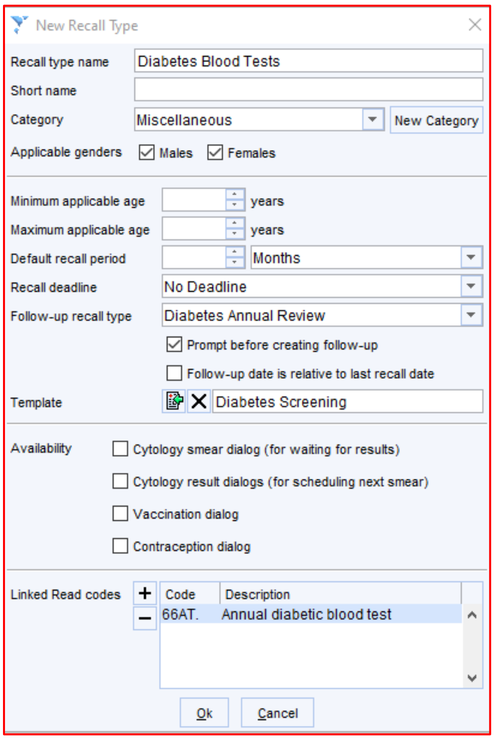


From the **Recall Types** screen:

- Select from the following options to create a **New Recall Type** or to **Amend** or **Delete** an existing Recall Type
- Click the **Refresh** tab, to reflect any changes you have made 

Creating a new Recall Type

- Click **New Recall Type** to configure a new recall for use in your practice



- Type in a **Recall Type name**. It should be clear what the recall is for. You can choose to add a **Short name**, which will display in the patient record
- Select the appropriate **Category** from the drop-down list. If a suitable category is not available, click **New Category** and type in a new one
- Tick the **Applicable gender**, if this is relevant
- Specify the **Minimum applicable age** and **Maximum applicable age**, if this is relevant
- The **Default recall period** is the period until the next recall is due. Set the interval required between recalls in 'Days', 'Weeks', 'Months' or 'Years', or leave blank if the period can change for each patient. Choosing a Default recall period means that when that recall is used in a patient record, SystmOne will automatically set a date for when that patient is due for follow-up
- A **recall deadline** can be set if your recall type must be completed in a certain timescale from the due date. Select *no deadline, 7 days, end of month, end of year or recall date* from the dropdown list
- If the recall you are creating is usually followed by another recall of a different type (e.g. 'Diabetes Blood Tests' might be followed by 'Diabetes Annual Review') then you can select an existing recall within your system from the **Follow-up recall type** dropdown (if not relevant, leave blank). This will allow you to select the option to **Prompt before creating follow-up** (recommended, as the follow-up might not be appropriate for every patient) and to specify if **Follow-up date is relative to last recall date** (for example, if you have chosen a 12-month recall, the date will be 12 months from the recall date, not today's date). The Follow-up Type will show on the Recall Types Screen
- If there is a clinical template which is relevant to your recall type, you can link this by clicking the **Template** icon. Recall types that have been linked to a template are marked with the template icon on the Recall Types screen
- If your recall is related to **Cytology**, **Vaccinations** or **Contraception**, you can select any of those options to allow your staff to select that recall when they are recording information in the screen relevant to that area

- If you want to link the recall type to one or more read codes, click **+** to search for and add the relevant code. This means that if you record one of these codes (or a child of one of these codes) during a consultation and the patient has a pending recall of that type, you will be asked if you want to mark the recall as 'Seen' or supersede the recall (create a follow-on recall). Recall types that have been linked to Read codes are marked with an **R** icon on the Recall Types screen. An example might be linking the code "Annual diabetic blood test" to update the Diabetes Blood Tests recall
- Click **OK**

The new recall will be listed on the Recall Types screen and will be available for use in your practice

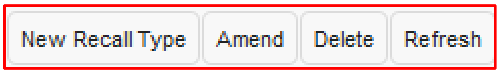
Recall Type	Category	Males	Females	Minimum Age	Maximum Age	Default Durati...	Deadline Type	Follow-up Type	Cytolo...	Cytolo...	Vacci...	Contr...	Links
Diabetes Blood Tests	Miscellaneous	✓	✓				No Deadline	Diabetes Annual Review					R
Diabetes Annual Review	Miscellaneous	✓	✓			12 Months	No Deadline						d

Amending a Recall Type

- From the **Main Menu**, navigate to **Setup>Data Entry>Recall Types**

The Recall Types screen is displayed

- Select the recall type you want to change from the **Category Folder/Node**
- Select the recall from the list
- Right click on the selected Recall Type or Click the **Amend** tab



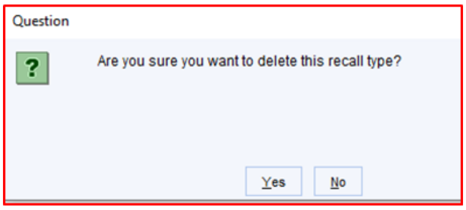
- Make your required changes
- Click **OK**

Deleting a Recall Type

- Select the recall from the list
- Right click or Click the **Delete** tab

When you select a recall type to delete, you will see this pop up window

- Click **Yes** if you are sure of this



Please note that once you have deleted the selected recall type, this will no longer be available for selection by users at your organisation

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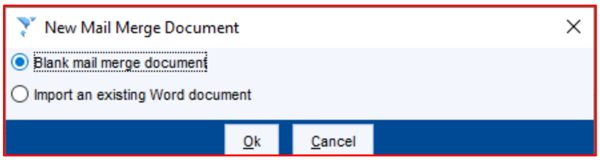
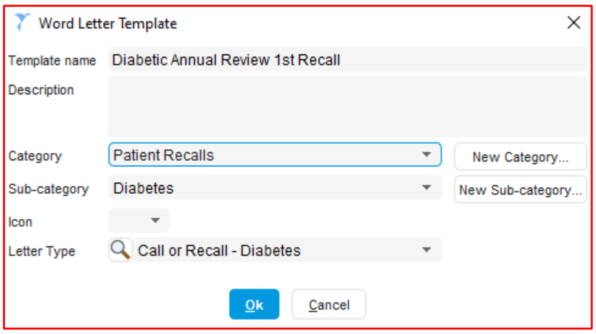
Creating a new Recall Letter Template using Integrated Word

New Recall Letter Template – Blank Mail Merge document

- From the **Main Menu**, navigate to **Setup>Referrals and Letters>Word Letter Templates**
- The Active Templates Tree in the left-hand pane will display all the letters under different categories currently available to use in your organisation. Some of these will be ones created and published by NWL and may not have been created by you
- You can expand and collapse each category by clicking on the arrow to the left and then click on a sub node, which will display a list of the available letters in the selected category in the right-hand pane
- Click the **New Template** Tab
- Select **Blank Mail Merge document**

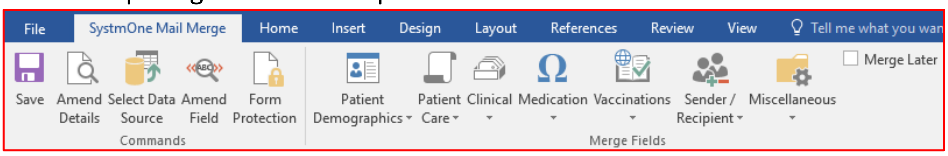


- Click **OK,** the Word Letter Template Details will display

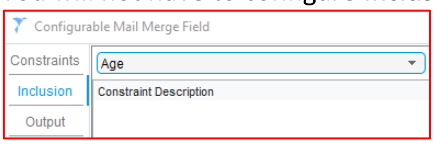


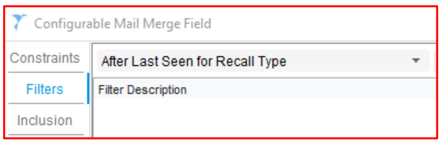
  - Type in a **Template name**
  - Select a **Category** from the drop down. If a suitable category is not available, click **New Category** and type in a new one
  - Select a **Sub-category.** If a suitable sub-category is not available, click **New Sub-category** and type in a new one
  - Select a **Letter Type**
  - Click **OK** when this is completed
  - SystmOne will load a blank **Mail Merge** Word Document

There will be a selection of **Commands** and configurable **Merge Fields** along the top toolbar for you to select when composing the letter template. You can also use the standard Word commands in the top ribbon

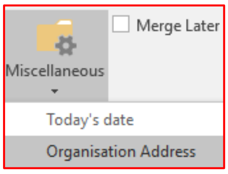


You will not have to configure **Inclusion** or **Filters** if these are shown in any of the Merge Fields



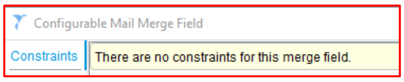


1. <u>Add the sending Organisation details in the appropriate place of the letter</u>

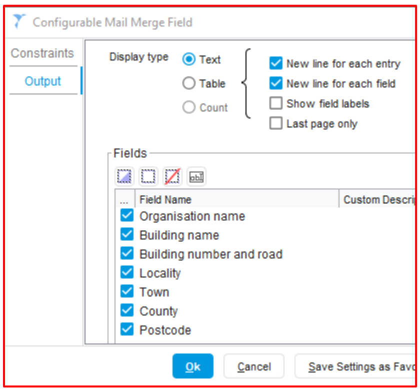


- Click **Miscellaneous** and select **Organisation Address** from the drop down options

There are no Constraints for this option



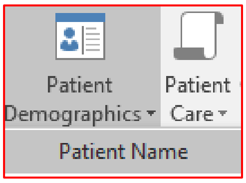
- Click on **Output**
- In **Display type**, select **Text, New Line for each entry** & **New line for each field**
- Select from the options given in **Fields**



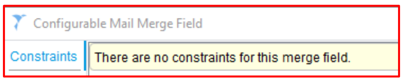
- Click **OK** when this is completed

2. <u>Add the recipient details in the appropriate place of the letter</u>

- Click **Patient Demographics** and select **Patient Name** from the drop down options



There are no Constraints for this option



- Click on **Output**
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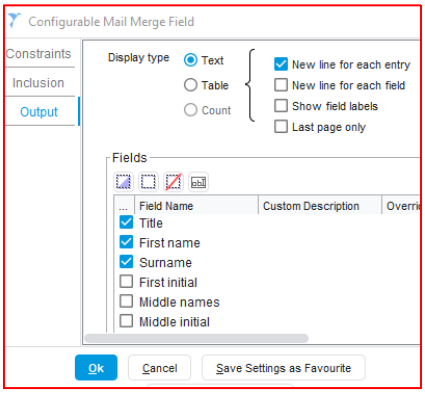
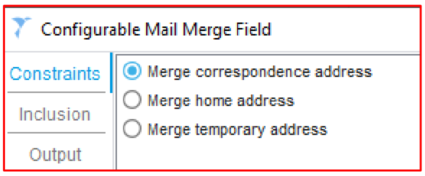
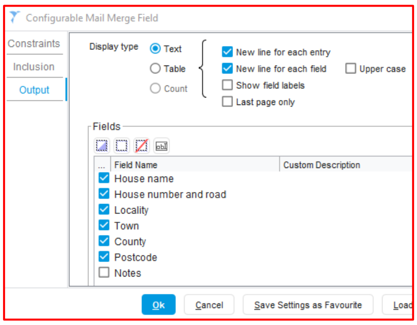


- Click **OK** when this is completed and press the return key
- Select **Patient Address.** You may have address options to choose from on the **Constraints tab**



- Click on **Output**
- In **Display type**, select **Text, New Line for each entry** & **New line for each field**
- Select from the options given in **Fields**



- Click **OK** when this is completed

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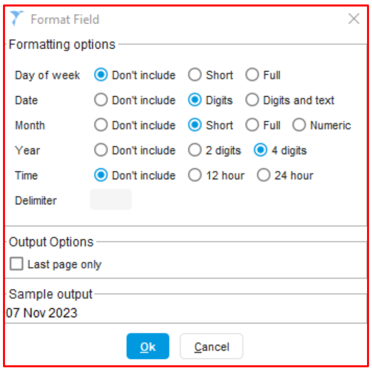
3. Add the letter date in the appropriate place of the letter

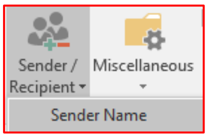
- Click **Miscellaneous** and select **Today's date**
- Select the **Formatting options** in which the date will appear on the letter. See **Sample output**



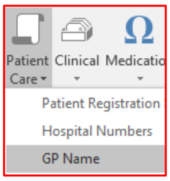
- Click **OK** when this is completed

4. Add the sender details in the appropriate place of the letter

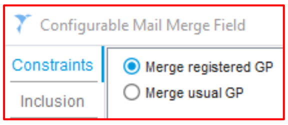
- Select from the **Sender** options



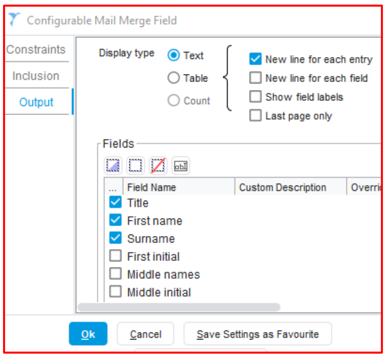
- Or as the example shows, you can merge the name of the patient's registered or usual GP



- Select from the **Constraints tab**



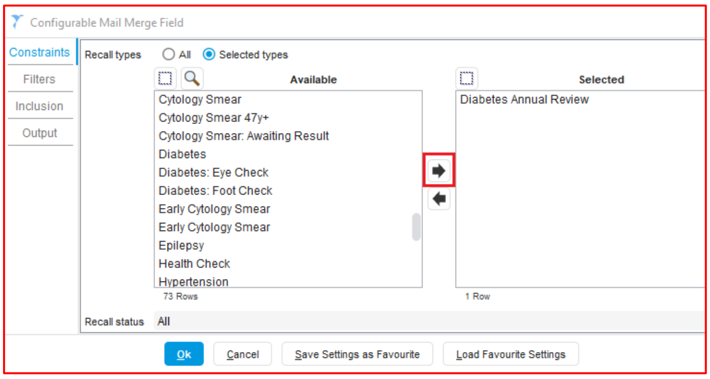
- Click on **Output**
- In **Display type**, select **Text, New Line for each entry** & **New line for each field**
  Select from the options given in **Fields** and click **OK** when this is completed



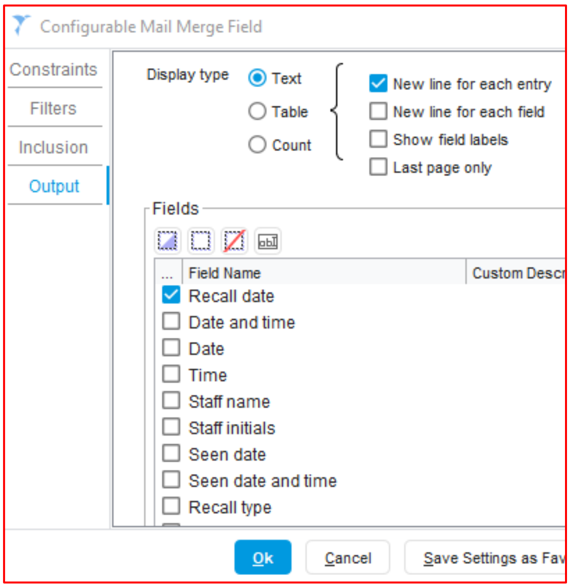
5. <u>Type the body of your letter</u>

When typing the body of the letter, you can also add other information from any of the **Configurable Mail Merge Fields**. In this example, a **Recall Date** from the **Clinical Merge Field** is shown

- Click **Constraints** and click **Selected Types**
- Select the **Recall type** by clicking on one of the available options
- Click the **arrow** to take it across to the **Selected** pane

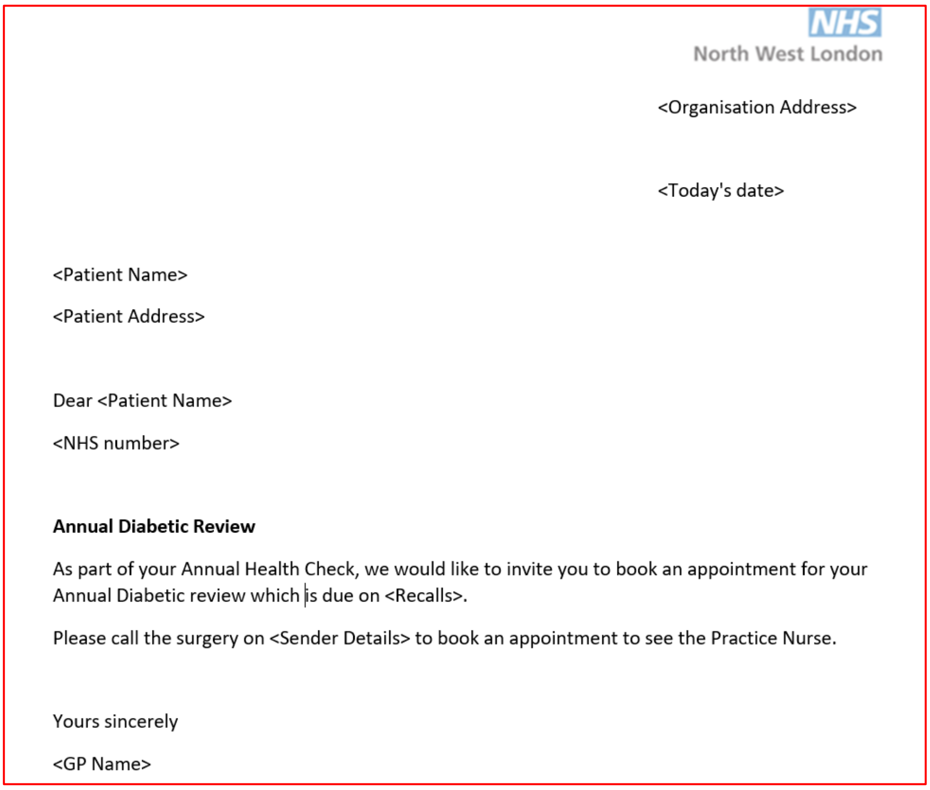


- Click on **Output** to select the Display type and Fields. The example shows the **Recall date**



- Click **OK** when this is completed

Your completed letter template may look something like this. All **Merge Fields** are enclosed in <brackets>



NHS
North West London

<Organisation Address>

<Today's date>

<Patient Name>

<Patient Address>

Dear <Patient Name>

<NHS number>

Annual Diabetic Review

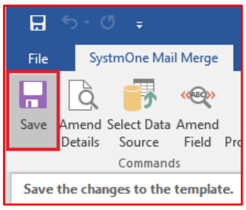
As part of your Annual Health Check, we would like to invite you to book an appointment for your Annual Diabetic review which is due on <Recalls>.

Please call the surgery on <Sender Details> to book an appointment to see the Practice Nurse.

Yours sincerely

<GP Name>

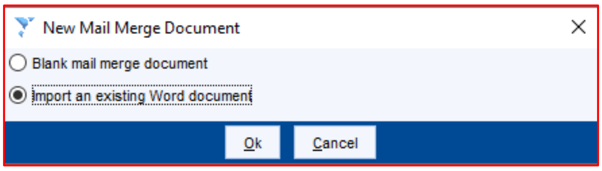
- When you have completed your letter, click the **Save** button at the top left of the **SystmOne Mail Merge** commands. You cannot save the document directly from Word



- Your New Letter Template will be listed under its category and will be available for use in your practice

New Recall Letter Template - Import an existing Word document

- Click the **New Template** Tab
- Select **Import an existing Word document**



- Select the letter (document) you want to import – *this could be on your desk top or in a personal or shared drive folder*
- Check the **Template name** and **Category** then click **OK**
- You can now add the configurable **Mail Merge** Fields as shown previously shown

We advise you to create the new letter in a TEST patient record, before using it in a real patient record

Monitoring patients who have an active recall

Reporting on Recalls – Recall Letter Generation

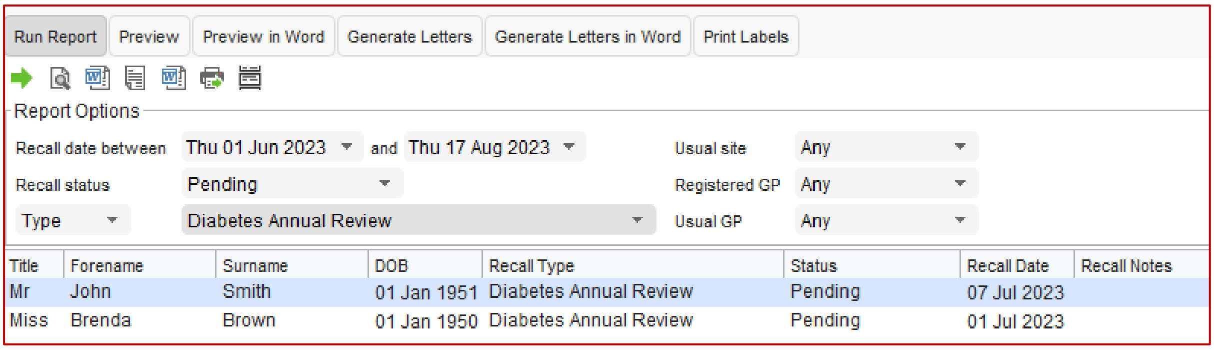
There are a number of ways to monitor patients who have active recalls (patient home page, clinical reporting etc.). This guide is designed to cover the easiest way to see patients at a glance

To create a list of patients who are due to be recalled between the dates you specify:

- From the **Main Menu**, navigate to **Reporting**>**Miscellaneous Reports**>**Recall Letter Generation**

- Using the **Report Options**, select the **Recall date between** range you wish to search between (up to 365 days). This is the Recall due date
- Select the **Recall status** you wish to search on. For most recalls awaiting action, this will be **Pending.** Other statuses such as 1st, 2nd, 3rd recall are used when a patient has been sent their 1st, 2nd or 3rd letter/SMS/email, inviting them to attend
- Select the relevant recall **Type** you wish to search on from the drop-down list
- Usual site, Registered GP and Usual GP can be left as Any
- Once all the above options have been completed, click **Run Report**

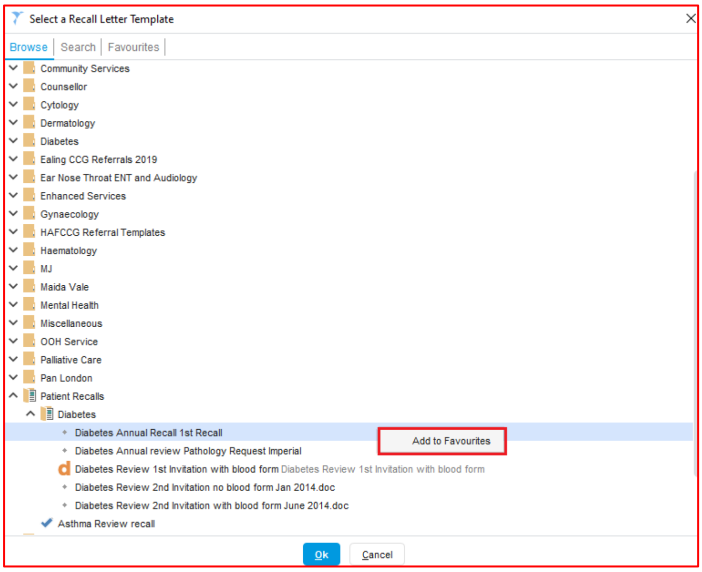
The result lists patients who are due for recall for the dates and other parameters you set



Generating Recall Letters for multiple patients

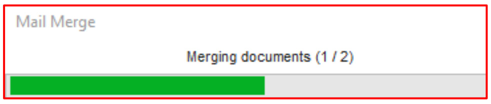
Generating recall letters for multiple patients in the report list:

- Select the appropriate patients, either:
    - ➢ Hold down the **Ctrl** key and click on each appropriate patient, or
    - ➢ Click on the first patient in a range, hold down the **Shift key** and click on the last patient in the range, or
    - ➢ Click and drag over the entries to select them
- Click on the Icon at the top of the view – **Generate letters for the selected entries in Word**
- Click to select the appropriate Recall Letter Template from the list and click **OK**



- You can right click and **Add to Favourites** to create your own list of favourites, which you can then make your selection from
- The recall letter is generated and displayed in Microsoft Word. Note the merge fields will not yet be populated
- Click the Merge and Print button at the top left of the SystmOne Mail Merge commands

The mail merge status bar will display



The list will update to show Letter Generated for the patients you selected

Title	Forename	Surname	DOB	Recall Type	Status	Recall Date	Recall Notes	...	...	Letter Generated
Miss	Georgina	Brown	01 Jan 1950	Diabetes Annual Review	Pending	10 Dec 2023		...	...	☑
Miss	Abigail	Martin	29 Sep 1978	Diabetes Annual Review	Pending	30 Dec 2023		...	...	☐
	Brian	Brown	01 Jan 1970	Diabetes Annual Review	Pending	05 Dec 2023		...	...	☐
Mr	Ozzie	Martin	29 Sep 1978	Diabetes Annual Review	Pending	05 Dec 2023		...	...	☐

In the patient's record, the Recall Status will update (in this example from pending to 1st recall)

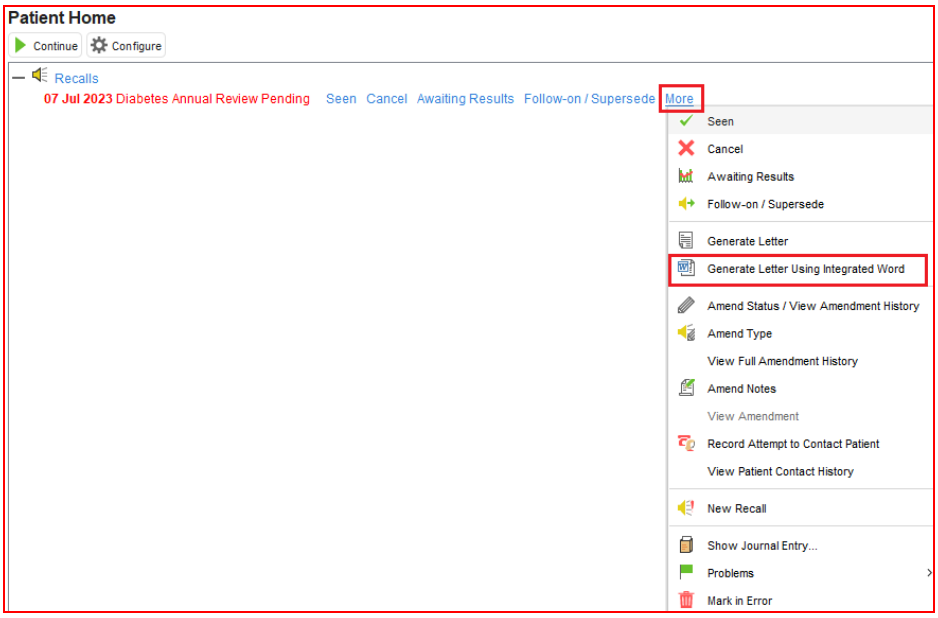
Created	Recall Date	Recall Deadli...	Type	Comments	Status
03 Nov 2023	01 Nov 2023		Diabetes Annual Review		1st recall

A copy of the recall letter is recorded in each patient record in **Communications and Letters**

Going onwards you can run **Recall Letter Generation Reports** to show each status (1st recall, 2nd recall etc.) so patients who have not yet been seen, are not lost to follow-up

Generating a Recall Letter for an individual patient

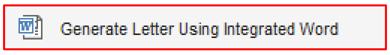
This could be adhoc if you notice on the patient home screen that the patient has an overdue recall



- Click on the **More** option and select **Generate Letter Using Integrated Word**
- Alternatively, click on the **Recalls** node of the Clinical tree

Created	Recall Date	Recall Deadli...	Type	Comments	Status
03 Nov 2023	01 Nov 2023		Diabetes Annual Review		Pending

- Right -click on the appropriate recall and select **Generate Letter Using Integrated Word**



- Or click on the Icon  at the top of the Recalls view
- Proceed as shown above

Disclaimer:

To the best of our knowledge and using the available information, this guidance is correct at the time of publishing.

Please do not hesitate to contact us if you have any queries via the IT Service Desk:
Phone: 0203 350 4050 or Email: nhsnwl.servicedesk@nhs.net