healthengine

Welcome to Healthengine Recalls

Full support guide for installed practices

At Healthengine, Recalls is used to set up both your clinical reminders and patient results.

What's inside

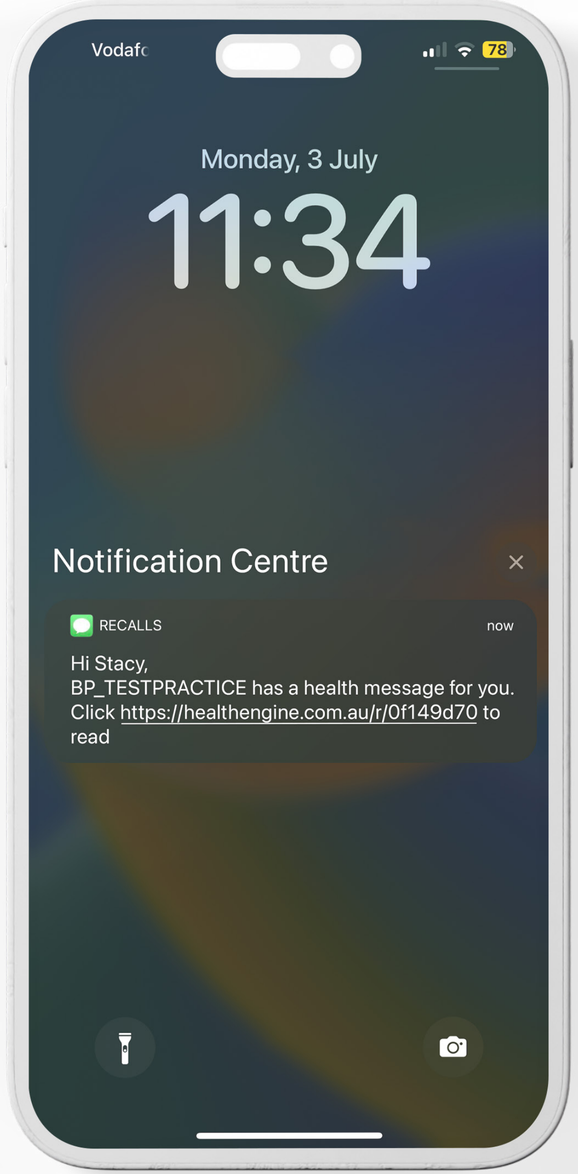
Welcome to your new Recalls system!

We can't wait for you to experience a faster and more cost-efficient way to process all of your clinical recalls.

You will enjoy the following with Healthengine Recalls:

- Unlimited SMS recalls
- Save costs on postage, printing and stationery
- Improve patient response rate
- Managing recalls in bulk and save staff time
- All actions are recorded on the patient file
- Patients can instantly book an appointment from SMS recalls
- Secure 3-step verification (RACGP compliant)
- Rapidly process recalls and set your automation paramaters to process recalls via SMS, phone or letter

Recalls works best when doctors mark recalls/clinical reminders as complete in their practice management software. This is the only way they remove from Healthengine (other than when they fall outside the sync period).



Recalls Capabilities

With the ability to make SMS, Phone Call and Letter Recalls, there are multiple “actions” you can take advantage of daily.

✓ SMS recalls

SMS is a great alternative to letters. Our inbuilt SMS functionality allows you to see and track the progress of a recall and scans the appointment book for a patient’s past and future appointments, giving you a complete view of a recall’s progress. This is all recorded against the patient file for complete record keeping and transparency.

✓ Letter recalls

There are plenty of cases for which letters are the best option. Letters still have a place for some patients, which is why we’ve made it possible to create letters as easily as sending an SMS. We’ve done this so that you have all of the contact methods that you need, right at your fingertips.

✓ Phone recalls

Calls are an integral part of the recalls process, so we’ve created a simple, intuitive way to manage and make record of your calls. This information is also stored in the patient’s file to ensure that you have a complete record for all of your recall activity for each patient.

✓ Auditing

Practices need to have a complete audit trail of recall activity. Healthengine Recalls keeps track of all of your recall activity for you, making sure that every action is automatically recorded against the patient’s file in your Practice Management System, along with user and date information. This ensures that your practice is fully compliant with the RACGP Standards.

Recalls Capabilities

(continued)

✓ Follow-up

When a patient requires a follow-up message, it's important that it doesn't go unnoticed. We understand how important this is, so Healthengine Recalls highlights these for you. This allows you to spend more time focused on actually communicating with patients, rather than on figuring out who needs to be contacted.

✓ Doctor attention required

There are times when a doctor needs to provide direction on a recall. Perhaps the patient hasn't responded, or is refusing to return to the practice. Healthengine Recalls makes it easy to flag a recall for a doctor's attention and to easily act on their directions.

✓ Automation available

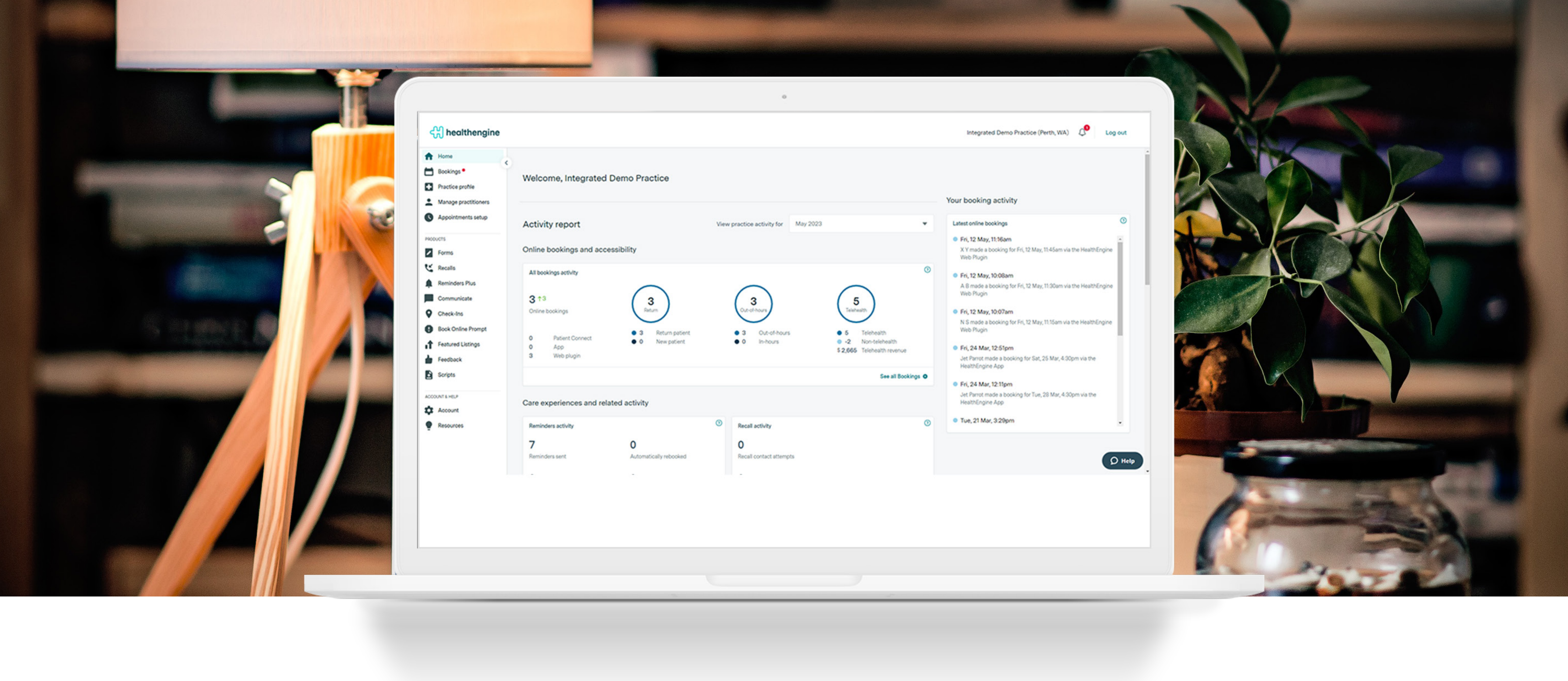
You can rapidly process recalls by automating certain tasks like sending an SMS, queuing a phone call contact attempt and queuing a letter contact attempt. Configure your settings in Recalls then all that's left for you to do is to periodically review your 'To Action', 'Calls', and 'Letters' tabs to complete any outstanding actions.

✓ Bulk action sends

If you'd like to be a little more hands-on with your recalls, you can use bulk action sends. Send a recall to an individual, or perform a bulk action whereby multiple patients will receive an SMS recall, e.g. for pap smears or breast screens.

✓ Secure web-based editing

With Healthengine Recalls, practices can process Recalls securely off-site (including at home) at any time, provided your server is running. This is a much-loved feature that saves practices time and gives people flexibility in their days.



Your Practice Admin. It all starts here.

You can access your Healthengine Recalls Dashboard via the Practice Admin and click on the Recalls tab.

To login, visit https://healthengine.com.au/appointment/admin/ or click the ‘Practice Login’ button at the bottom Healthengine.com.au.

1. Click on ‘Recalls’ on the top navigation panel.
2. Select your username (as per your Practice Management System).

Your Settings Page

The Healthengine Recalls settings page is where you can easily set your own personalised Recalls system settings.

First Contact Timeframe (clinical reminders only)

This setting determines how many days before a recall is due you would like it to appear in the ‘To Action’ tab. Our default setting is 14 days to give you plenty of time to contact the patient prior to the recall due date. However, you are able to increase or decrease this number as suits your practice.

Subsequent Contact Timeframe

This setting determines how many days after a contact attempt you would like a recall to return to the ‘To Action’ tab. You can set the number of preferred days for each contact type. Our defaults are 3 days later for SMS recalls, 10 days for letter recalls, and 2 days for phone call recalls. After a contact attempt has been made on a recall, it will be moved into the ‘All Synced Recalls’ tab until the number of days have passed according to your settings for each contact type.

Recall Sync Range

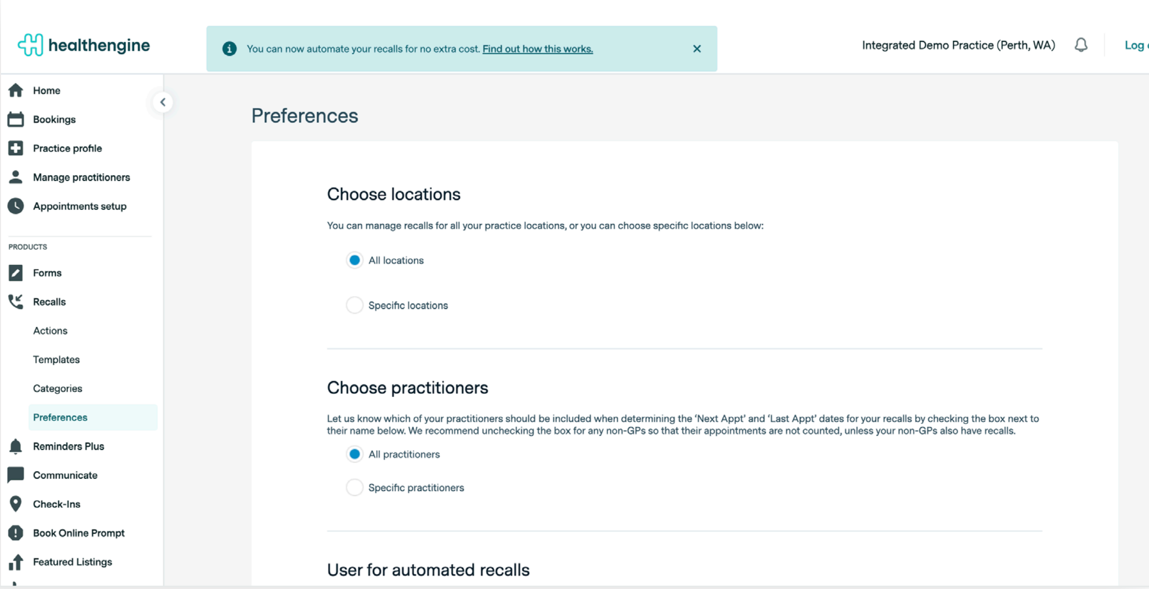
This setting determines which recalls appear in your ‘~~All~~ Synced Recalls’ tab. By default, all recalls that are due within the next 45 days or within the last 45 days will be displayed in the ‘~~All~~ Synced Recalls’ tab. Any recalls with a due date outside of this date range will NOT show up in the ‘All Synced Recalls’ tab.

Letter Header and Footer

These settings control:

1. Where the patient address appears on the letter. You can change this setting so that the patient address aligns with the window of your practice’s envelopes
2. Whether or not your practice’s address appears in the header space
3. Where your header image appears on the page
4. Where your footer image appears on the page
5. Add or remove a header image
6. Add or remove a footer image

Please remember to always click the ‘Save’ button at the bottom right of the page after making any changes to your settings.



Recalls Functionality Overview

Getting to know a new system can be daunting, so here is a quick overview of how the Healthengine Recalls system works.

The interface has several 'tabs'; however, the primary tab is the 'To Action' tab. This is where all recalls that are coming up due appear for actioning. Once a recall is actioned from the 'To Action' tab, it is sent to the '~~All~~ Synced Recalls' tab. The recall will stay open in this tab until:

- The doctor or nurse marks the recall as given, contacted, or performed in the Practice Management System (PMS).

This will hide the recall completely from the Healthengine Recalls system.

- The recall is marked as 'No further action required' in Healthengine Recalls.

This will archive the recall (becomes 'greyed out') and it will stay in the 'All Synced Recalls' tab until it's due date falls outside of the date range settings, at which time it will no longer appear in the system.

- The patient books an appointment with the practice.

At this point, you are able to use the filter to remove patients with an appt booked. Please note that this will prevent the recall from returning to the 'To Action' screen ever again, so it is important to ensure that the appointment the patient booked is for the purpose of the recall before archiving it.

If the patient doesn't book an appointment or the recall isn't given, the recall will be sent back to 'To Action' after a set number of days, depending on the communication method used to attempt contact.

The number of days the system will wait until moving a recall back into 'To Action' is determined by your Recalls settings.

This process will repeat until the recall is archived, either manually after the patient books an appointment, or by the doctor marking the recalls as complete/given/performed in the PMS. *Please note that recalls for patients who are marked as 'Inactive' or 'Deceased' on their patient record will not appear in the Healthengine Recalls system.*

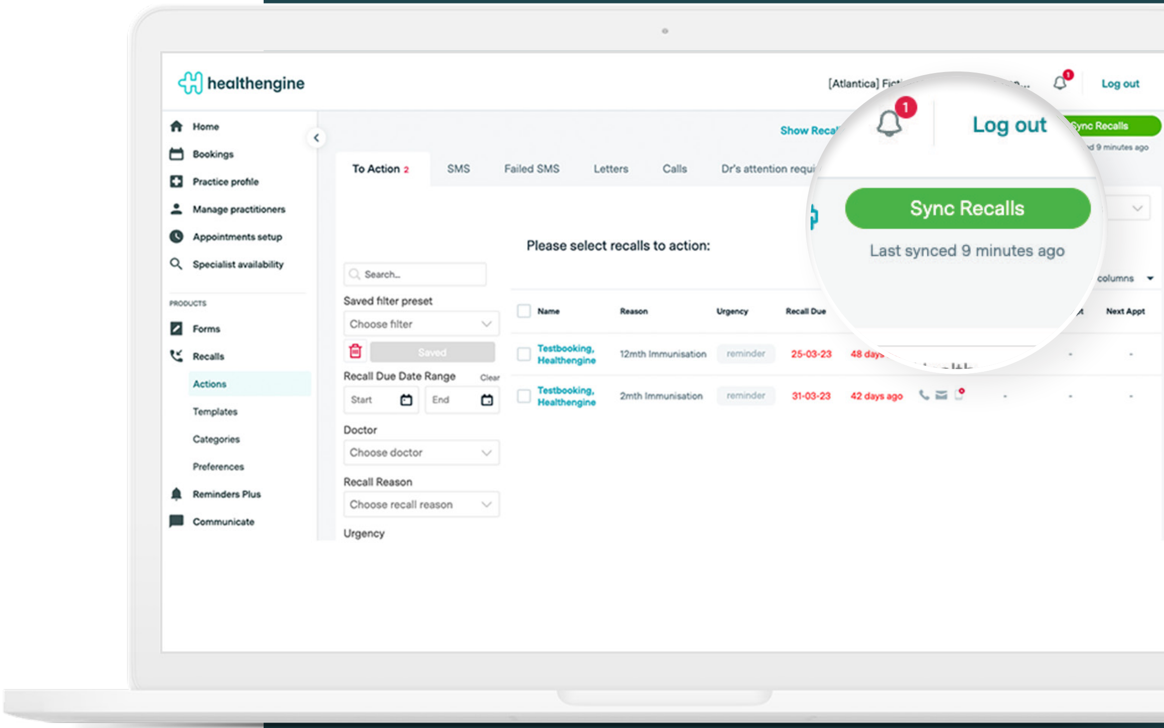
Handy Tip: We recommend using Google Chrome for Healthengine Recalls system.

All Synced Recalls

The ‘Sync Recalls’ button in the Healthengine Recalls system is used to synchronise the data between Healthengine Recalls and your Practice Management Software (PMS).

Any changes that occur in your PMS will not instantly appear in Healthengine Recalls until this button is clicked. We recommend clicking the ‘Sync Recalls’ button at the start of each day and anytime you wish to see new changes from your PMS in the Healthengine Recalls system.

This is automatically synchronised every 12 hours, but if you need to refresh, you have that control.



How SMS Recalls Work

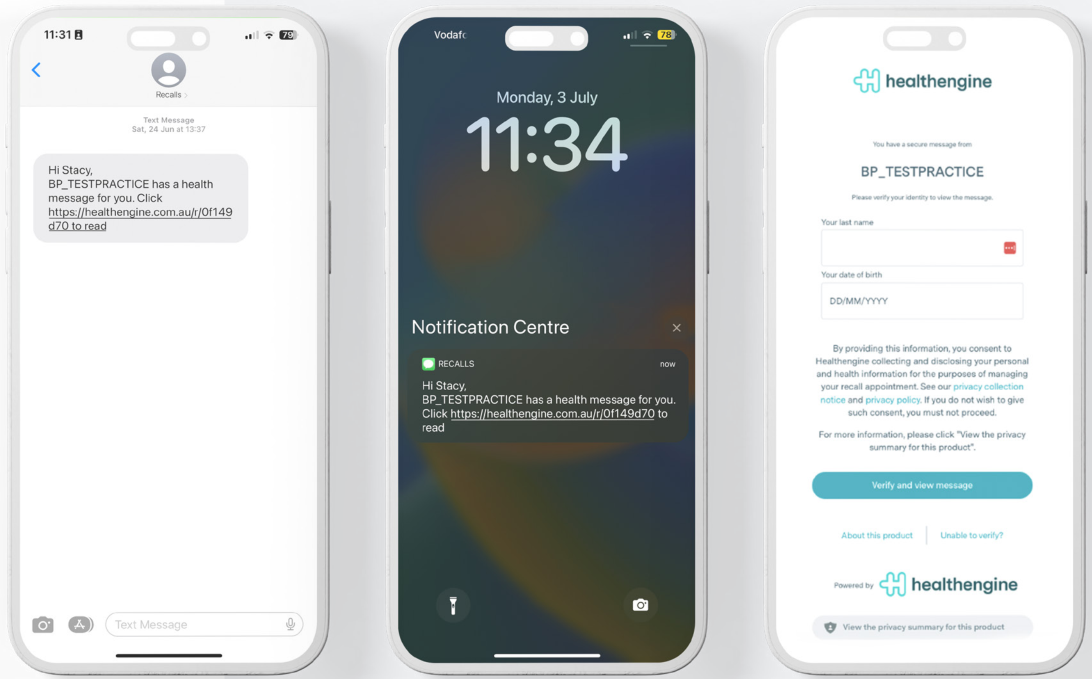
Practices are able to create patient lists based on information within their PMS, and send a recall to an individual, or perform a bulk action (whereby multiple patients will receive an SMS recall, i.e. for pap smears or breast screens).

Healthengine sends an automated link straight to the patient's mobile device, via secure SMS, which initiates a three-point identity check. When the patient verifies their identity, they will see details of the electronic recall and can book an appointment instantly, via the practice's Online Booking System.

Any attempt by the practice to contact a patient is recorded in the patient file. Additionally, all patient interaction with the recall message is recorded in the patient record, i.e. message delivered, message read, appointment booked.

Verifying a patient's identity

A patient is required to input their date of birth and postcode as recorded in the patient file of the PMS. If, after multiple attempts, the patient is unable to verify their Identity, they will be prompted to contact the practice directly. if a patient fails the verification process, they will be moved to the 'Failed SMS' tab.



Patient View of SMS Recall 3-step verification

SMS Recall Templates

Creating SMS templates

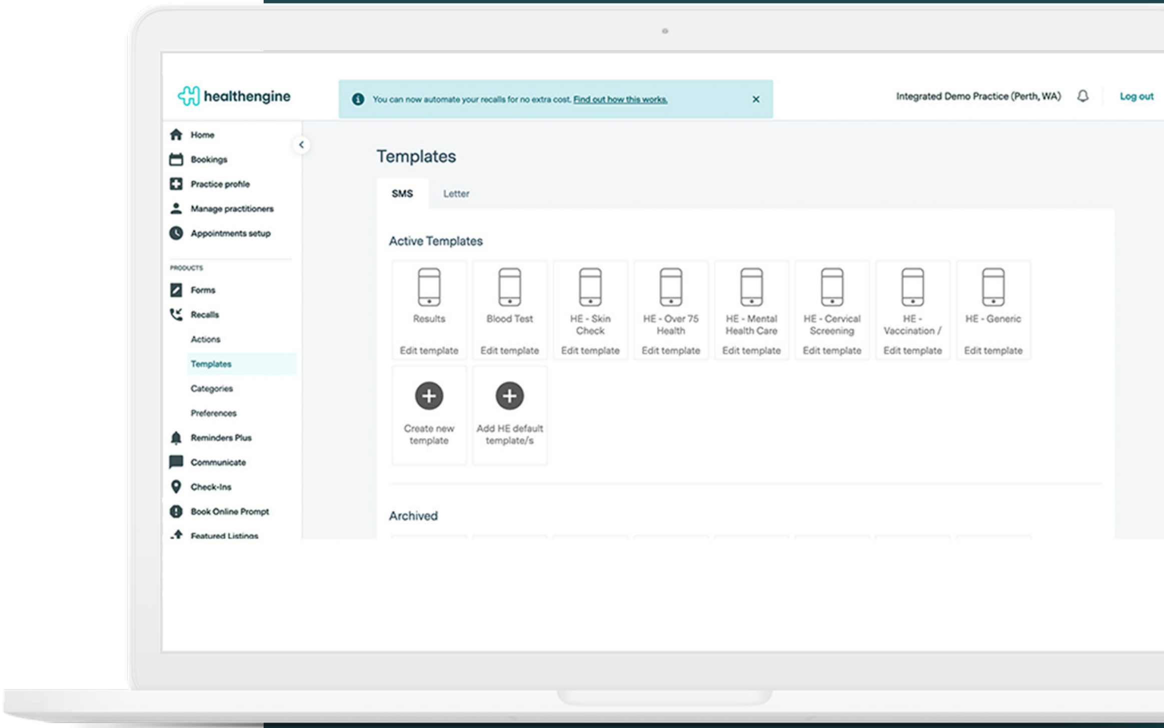
To create an SMS template, navigate to the ‘Templates’ link at the top left of the Recalls tab in Practice Admin.

Click on the ‘Add template’ button. You will be directed to the ‘Create Template’ screen, where you can now create a custom template.

In the ‘Name’ box, type in a name that will make the SMS template easily identifiable for future usage, e.g. for a blood test recall template, an ideal name would be ‘Blood Test’.

In the ‘Content’ box, add the body text of the recall message. You can use the green buttons to add ‘quick parts’ to the message that will prefill the message with the relevant information when you create an SMS recall, saving you having to manually customise each SMS recall you send.

Once you are happy with the template, click ‘Save Template’.



How to edit, archive, and delete an SMS template

To edit an SMS template, navigate to the ‘Templates’ section of Recalls and click on the template you wish to edit. You will be directed to the ‘Edit Template’ screen where you can change the template as needed.

You can also delete and archive templates from this screen. Archived templates won’t appear in the ‘Choose template’ drop down list when sending an SMS recall and can be re-added to ‘Active Templates’ at any time by clicking on them and clicking ‘Save Template’.

Deleted templates cannot be re-activated, they are permanently removed from your Recalls system.

Letter Templates

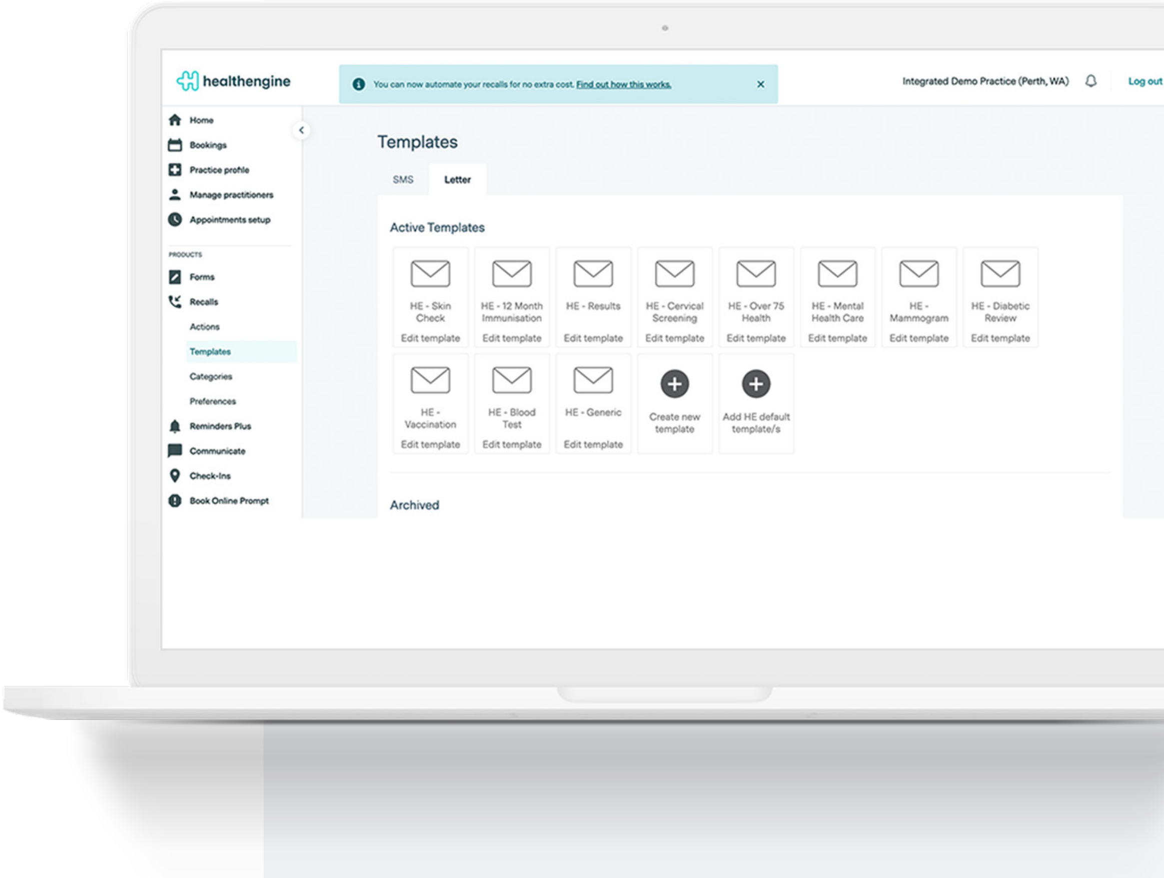
To create a letter template in Healthengine Recalls, navigate to the ‘Templates’ link at the top left of the Recalls tab in Practice Admin. Once there, click on the ‘LETTER’ tab.

Click on the ‘Add template’ button. You will be directed to the ‘Create Template’ screen, where you can now create a custom template.

In the ‘Name’ box, type in a name that will make the letter template easily identifiable for future usage, e.g. for a blood test recall template, an ideal name would be ‘Blood Test’.

In the ‘Content’ box, add the body text of the letter. You can use the green buttons to add ‘quick parts’ to the letter that will prefill the letter with the relevant information when you create a letter recall, saving you having to manually customise each letter recall you send.

Once you are happy with the template, click ‘Save Template’. If you wish to cancel the template creation at any time, you can do so by clicking the ‘Cancel’ button.



Phone Recalls

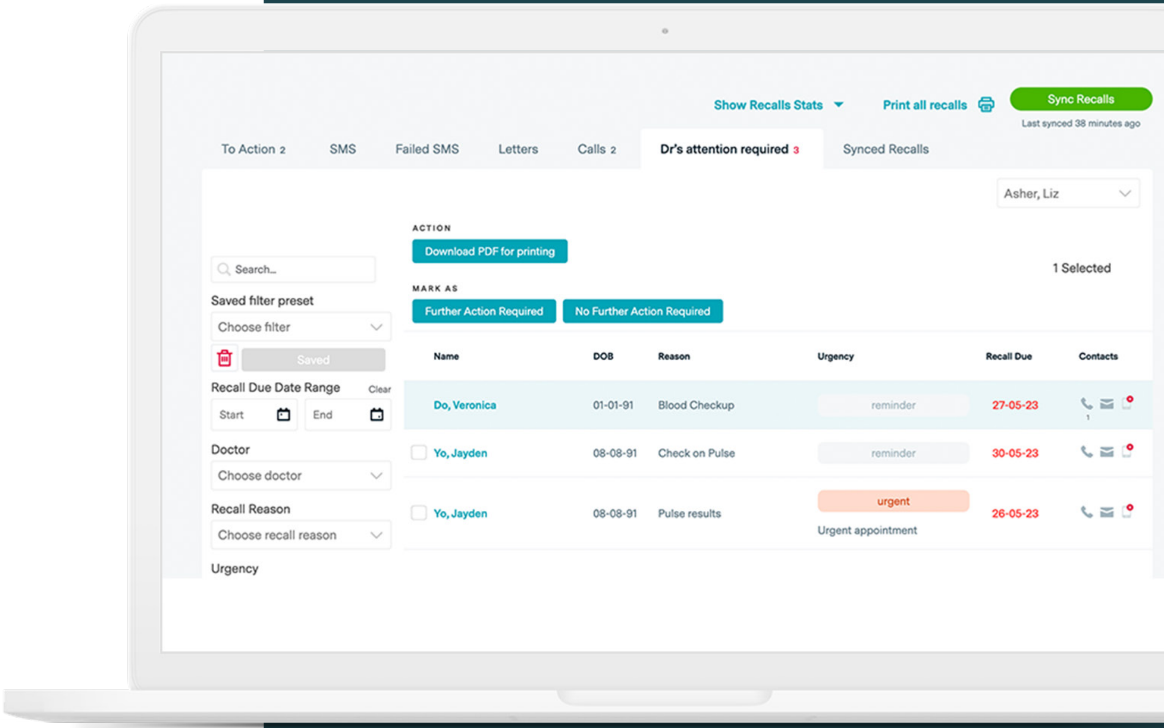
To process a recall by phone call, select the recall/s you wish to process and click the ‘Call’ button under the ‘SEND RECALL’ menu.

After clicking the ‘Call’ button, you will be taken to the ‘Calls Pending’ tab where the selected recall/s will now appear.

To process a recall from this tab, click the ‘Choose call outcome…’ drop down box, add any relevant comments, and click ‘Save’.

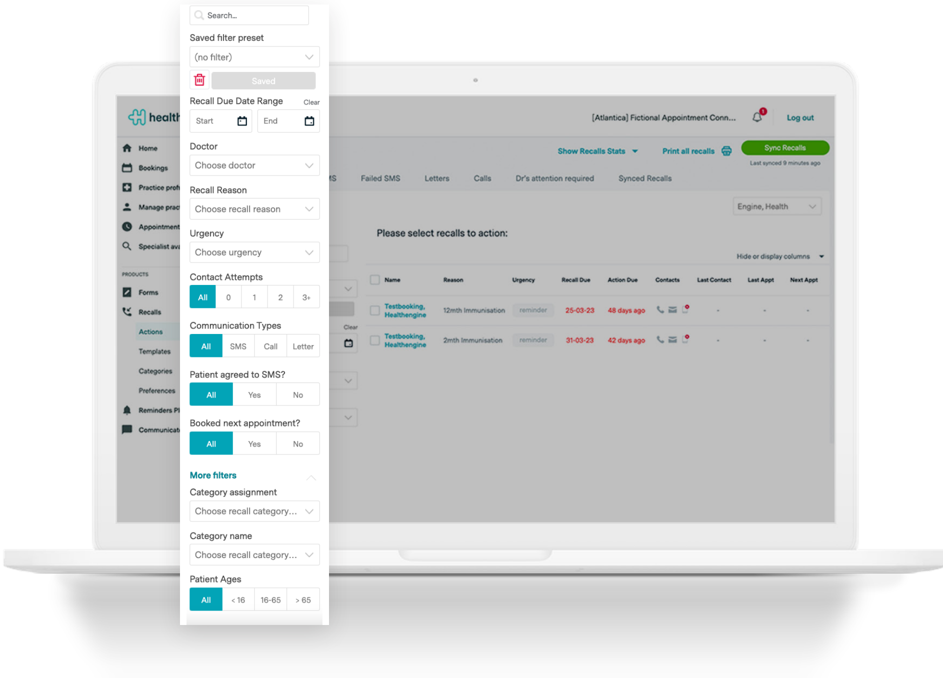
To cancel a pending call, simply click ‘Cancel Call’ under the recall you wish to cancel. *Note that each recall has a menu that you can show by clicking on the ‘>’ arrow button next to the relevant patient name.*

After saving, the recall will appear in the ‘All Synced Recalls’ tab and will remain there until the pre-set number of days have passed before it will return to the ‘To Action’ tab and you will need to process the recall again or mark as ‘No Further Action Required’ which will archive the recall in the ‘All Synced Recalls’ tab (it will appear greyed out).



Filters Available

In the Healthengine Recalls system, you have the below filters to assist you in processing recalls more efficiently.



Free text search

This allows you to search by patient name or recall type.

Doctor

This allows you to filter the recalls by the associated doctor.

Recall Type

This allows you to filter the recalls by their recall type.

Urgency

This allows you to filter the recalls by their urgency.

Contact Attempts

This allows you to filter the recalls by the number of contact attempts that have been made against it.

Communication Types

This allows you to filter the recalls by the communication types that are possible for that recall; for example, by clicking on ‘SMS’, this shows only recalls that can be sent as an SMS (i.e. the patient record associated with that recall has a valid mobile number against it in your PMS).

Patient agreed to SMS?

This allows you to filter out any recalls for which the associated patient has or hasn’t agreed to receive SMS communications from your practice. Not relevant for Best Practice users. Best Practice users will see a red cross on their mobile icon for this reason.

Booked next appointment?

This allows you to filter out any recalls for which the patient has already booked an upcoming appointment.

You can also sort the recalls by ascending or descending order for each column heading by clicking on that column heading.

You can combine filters and sorting as much as you like to narrow down the list of recalls that are displayed.

Customise Column Display

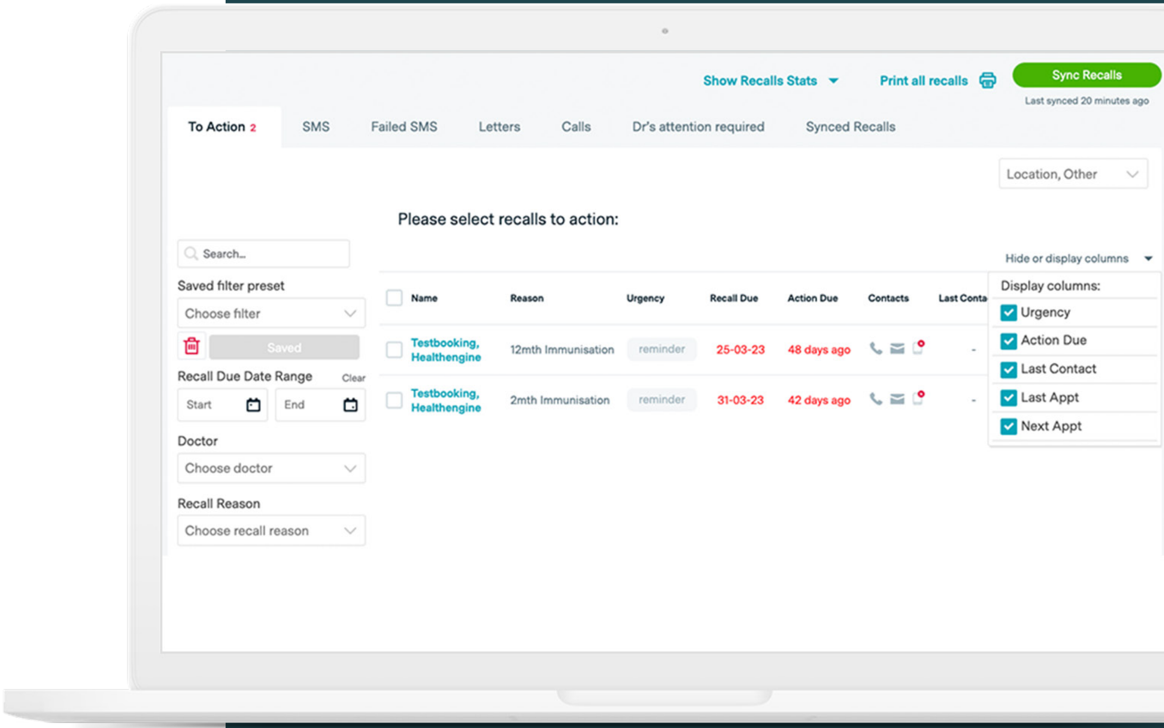
If your practice has set columns you wish to view each time you log into your Recalls Dashboard, you can customise the column display which will be reflected for all users within your practice account.

If you have columns that you would like added into your dashboard default display, you can add these using the below steps:

Click on the right hand drop down arrow and pick and choose the columns you want to see.

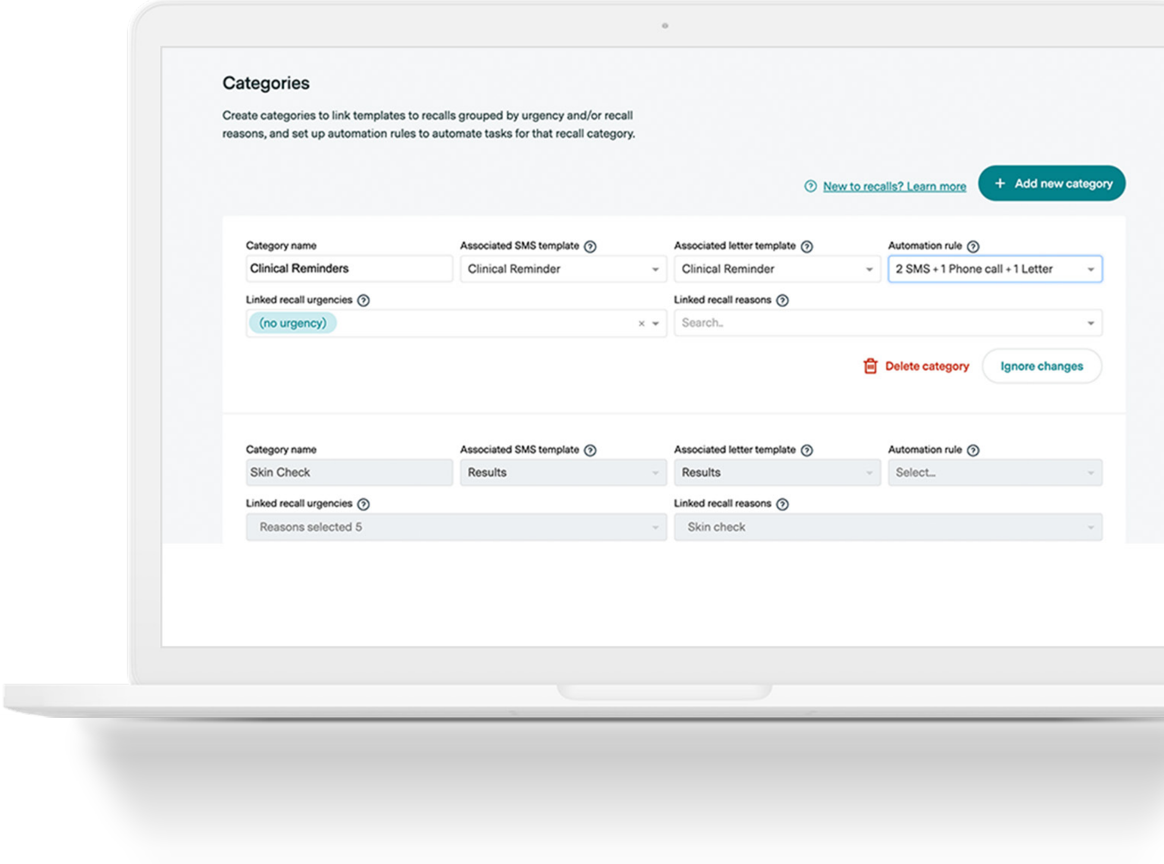
This will automatically be saved when you click out of the drop down menu.

It is important to note all greyed-out check boxes cannot be unselected as they are required fields.



Recall Categories

If you have multiple recall types that have been entered by your Doctors in your Practice Management System (PMS), you can group these into categories to make sending a breeze.



An example of this is if you have recall type 'blood test' and another entered as 'pathology recall', you can create a Category called 'Blood Tests' and link these names into one group. This saves Doctors needing to rename recall types and helps you do all the same recalls at once.

To set up Recall Categories, follow the steps below:

1. Go to Templates in your top navigation
2. Select 'Categories' tab and insert your new category e.g. 'Blood Test Results'
3. In the 'Link Recall Type' box, start typing the name of the Recall Types you wish to group together
4. Select the template that you use for certain recall types

When the system detects multiple recalls within the same category being sent to one patient, the Recalls system automatically groups them into one recall message. Make sure you associate the right template with the category, as you will not be able to edit it when you go to send your recalls. You can edit it in the Templates page.

You can use urgencies with or instead of reasons to stop patients receiving multiple messages. Using urgencies helps keep clinical reminders and results separate. Example: You're setting up a category for the SMS sent to patients who are due for cervical screening. You create a category, call it 'cervical screening', and assign the recall reason for cervical screening. If a patient had their test performed, and the results are named cervical screening they will also fall into this category and receive an SMS saying they are due for a test.

To prevent this, assign the urgency 'no urgency' to their category so that only patients due for a clinical reminder get the SMS.

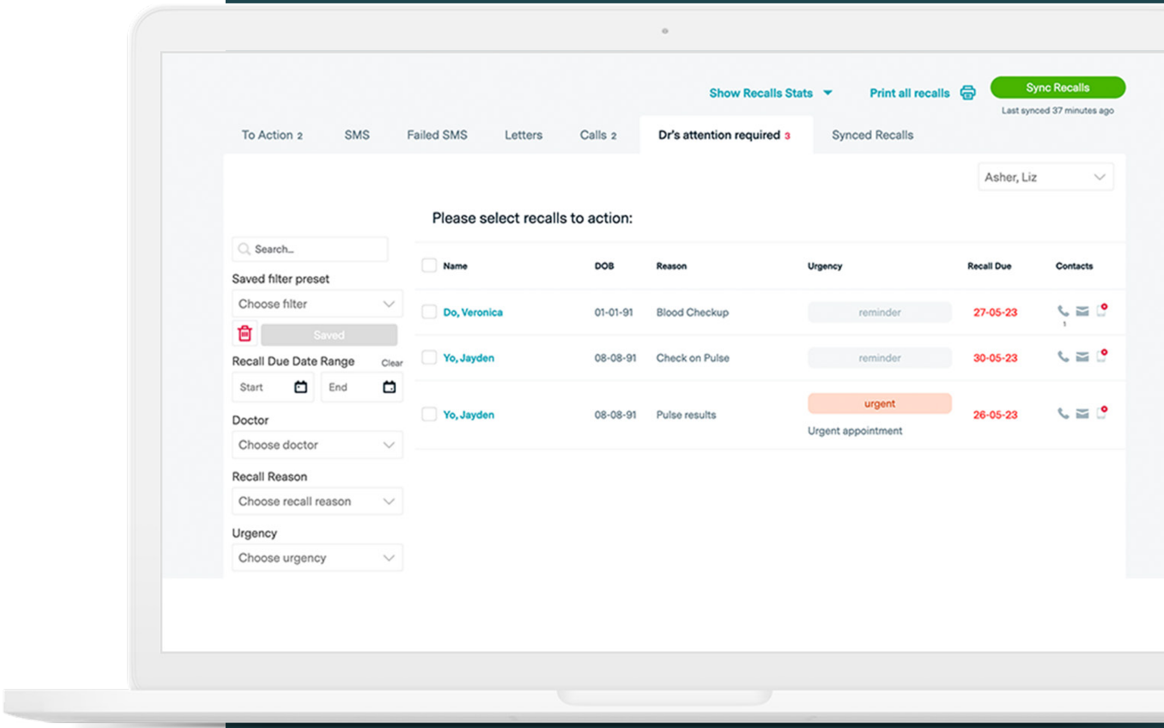
Automating Recalls

This feature enables your practice to automate certain tasks in Recalls, such as sending an SMS, queuing a phone call contact attempt, and queuing a letter contact attempt.

To set up Recalls Automation you'll take the following steps:

1. Assign a PMS user for automated actions
2. Assign your urgencies to the 3 urgency types
3. Assign your recall reasons and/or urgencies to categories
4. Add automation rules to your categories
5. Review your Recalls 'Preferences'.

We'd love to help you automate your Healthengine Recalls. Please reach out to your Customer Success Manager or your friendly customer support person to help you set this up.



‘Doctor’s Attention Required’

How To Mark A Recall As ‘Doctor’s Attention Required’

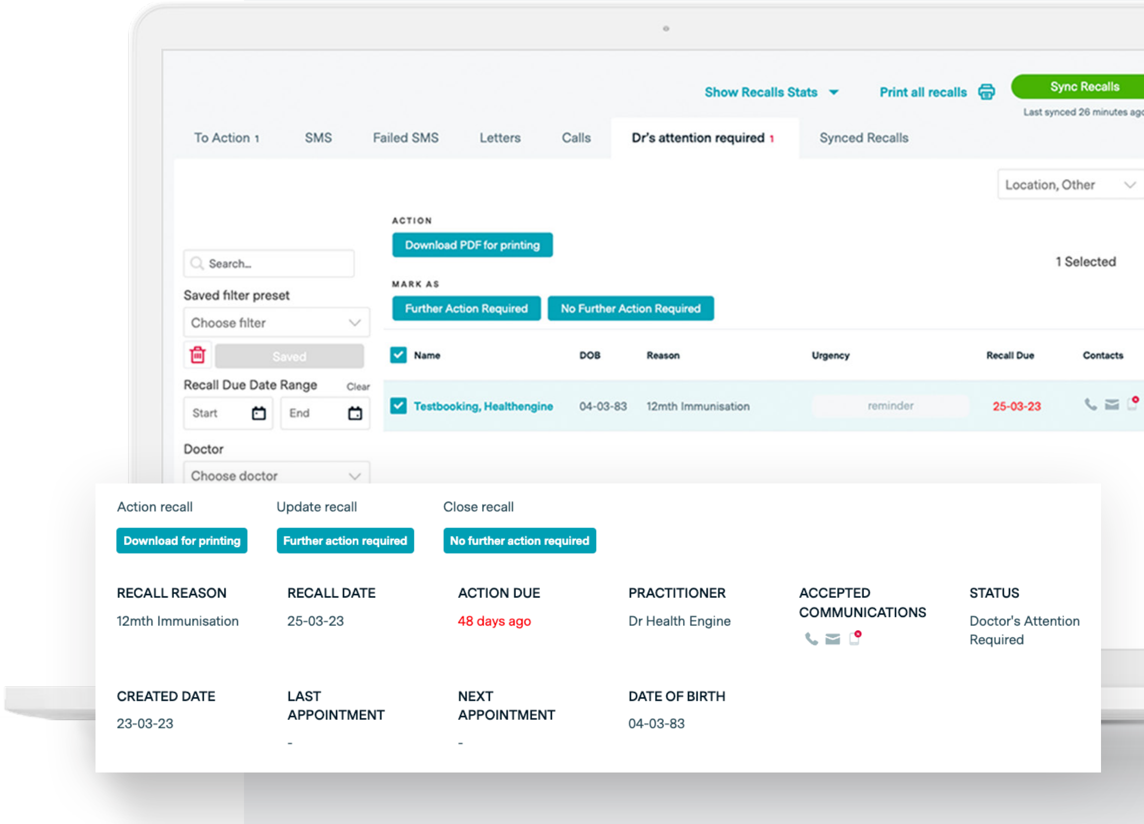
When a recall has had several contact attempts with no response from the patient, you may need to get advice from the doctor on how to proceed. In this case, you can mark the recall as requiring the doctor’s attention.

To do this, simply select the recall/s you wish the doctor to provide advice on, and click the ‘Doctor’s Attention Required’ button under the ‘MARK AS’ menu options.

Once you have clicked this button, you will be directed to the ‘Doctor’s Attention Required’ tab. From this tab, you can download a PDF of all selected recalls to give to the doctor. This PDF summarises the key information of each recall and has a section for the doctor to add their notes against the recall.

Once the doctor has provided their feedback on how to proceed, you can send a recall back to the ‘To Action’ tab by clicking ‘Further Action Required’, thus taking it out of the ‘Doctor’s Attention Required’ queue.

Alternatively, if no further action is required, you can click ‘No Further Action Required’ to archive a recall and send it to the ‘All Synced Recalls’ tab.



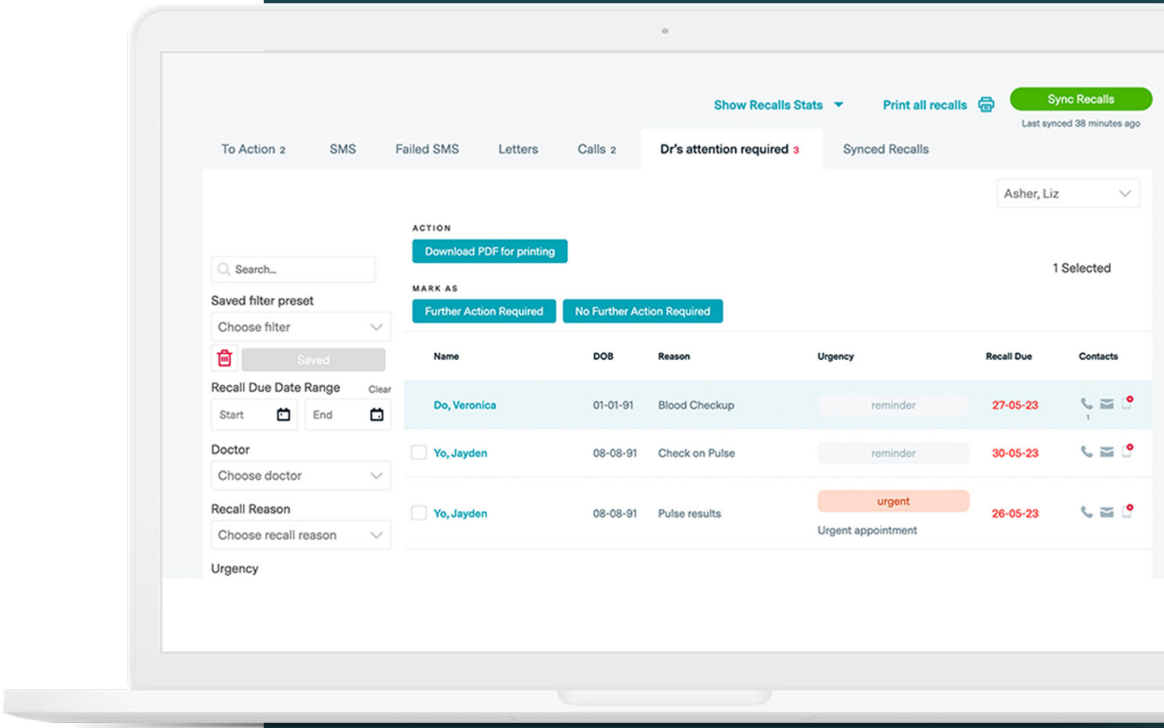
Archive A Recall

To archive a recall so that it no longer gets sent to the 'To Action' tab, select the recall/s you wish to archive, and click on the 'No Further Action Required' button.

Once you have done this, click on the 'All Synced Recalls' tab. The archived recall will now appear in this list with a grey background.

This recall will no longer be sent to the 'To Action' tab for actioning. If you wish to unarchive a recall, simply select the recall from the 'All Synced Recalls' tab and click on the 'Further Action Required' button.

The recall will now be reactivated and will return to the 'To Action' tab when it's due date is coming up. *Note that if the due date is in the past or within the date range in your settings, it will immediately return to the 'To Action' tab.*

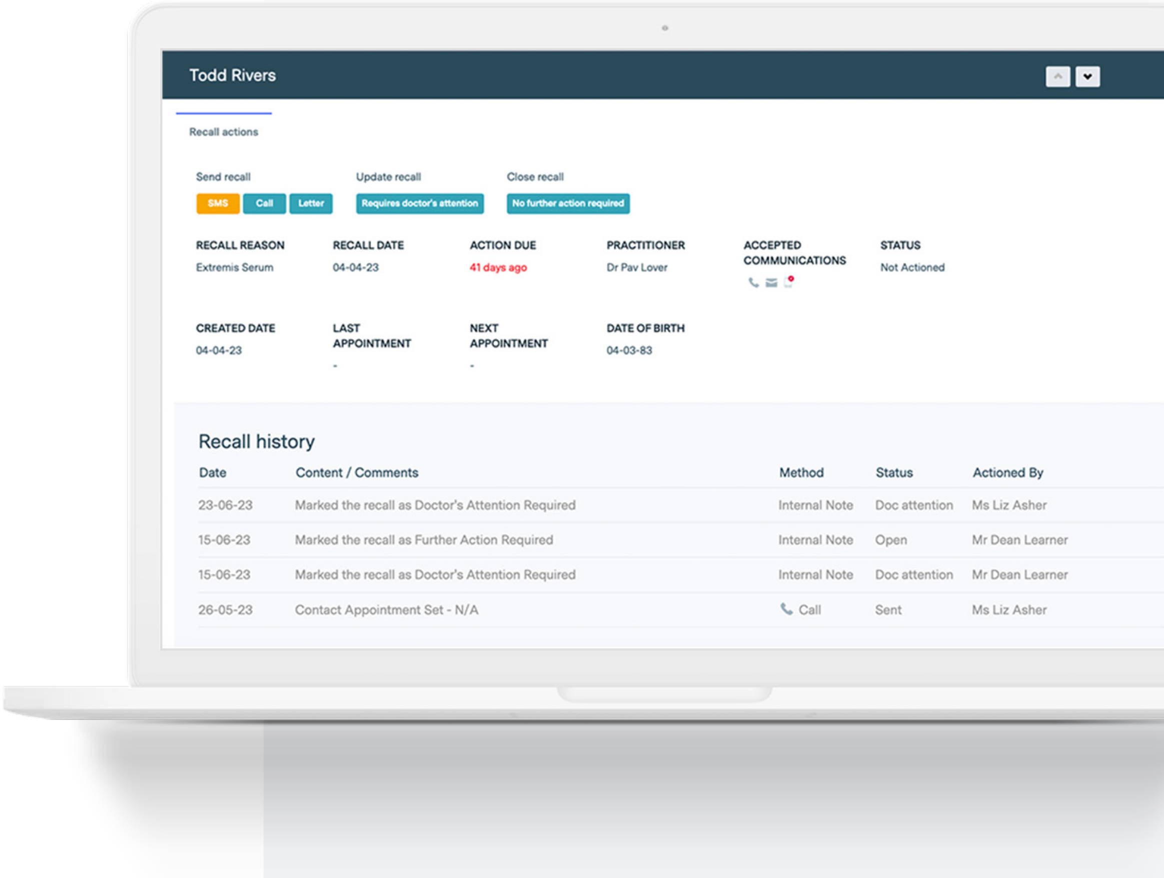


Patient Detail View

By clicking on a patient name in Healthengine Recalls you receive a holistic view of their recall status and details.

1. Patient name - This is the name of the patient that the recall is for
2. Recall Status - This is the overall, current status of the recall
3. Next/Last Recall arrows - These arrow buttons allow you to move between different recalls within the detail view
4. Recalls details - All of the details of the recall, including doctor name, recall type, etc.
5. Recall history - Provides an overview of the history of the recall, i.e. all actions performed against that recall in the Healthengine Recalls system
6. Send Recall buttons - These buttons allow you to send the individual recall from the detail view
7. Mark As buttons - These buttons allow you to mark the individual recall as requiring the doctor's attention or no further action required

To exit the detail view, simply click outside of the white area.



Your Marketing Resources

It is important to inform patients about your plans to send recalls and reminders by SMS. You may wish to:

- Place a poster at reception and in the waiting room
- Hand out flyers to patients upon arrival at your practice
- Update your letter footer telling patients about SMS Recalls
- Send an email or SMS notification if you have patient permission

To assist you with this, we have created a poster and flyer. You can contact your Account Manager at Healthengine and they will post professionally printed posters to your door.

Want to print it on your end? You can login to your Practice Admin Portal > and download the posters for printing.

Where Notes Are Added:

Best Practice

When a recall is processed through Healthengine Recalls, the system puts notes against the recall in Best Practice. Depending on the recall type, this could be in one of a few locations.

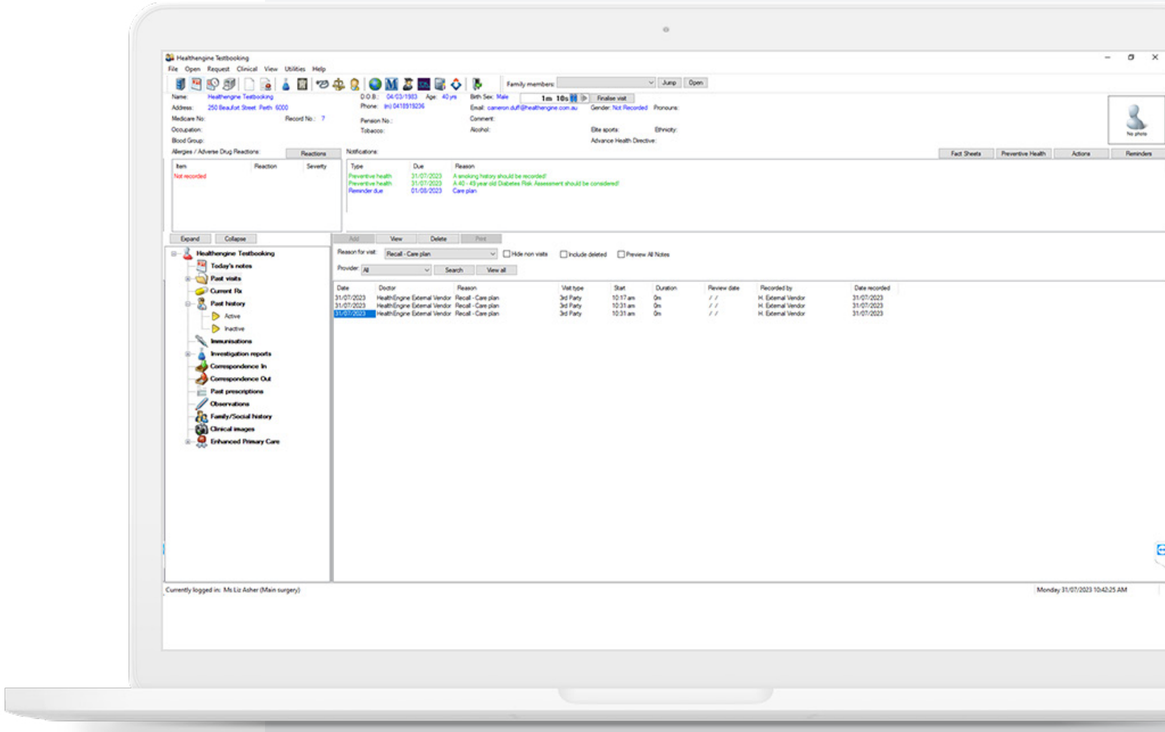
For reminder type recalls, such as pap smears, skin checks, etc., Healthengine Recalls will create a record of any actions performed against that recall into the Past Visits section (NOTE: you will need to have the ‘Hide non visits’ checkbox UNCHECKED in order to view these records). When right-clicking on one of the non-visit entries, choose ‘view’ from the drop down menu to see the record content.

For results-based recall types, such as blood test results and other pathology results, the record is updated against the relevant result in ‘Investigation Reports’. When right-clicking on the relevant result, choose the ‘View Notes’ option from the drop down menu.

By double-clicking on the note entries, you can view the full details of the notes.

For all other recall types, such as discharge summaries, the record will be updated against the relevant entry in ‘Correspondence In’. When right-clicking on the relevant entry, choose the ‘View notes’ option from the drop down menu (see image below).

The note has ‘HE’ prepended to it to distinguish notes created by Healthengine Recalls from those created by/in Best Practice. If using Healthengine to generate a Letter, the letter populates in the ‘Correspondence OUT’ section of the patient file in Best Practice.



Where Notes Are Added:

MedicalDirector PracSoft

When a recall is processed through Healthengine Recalls, the system puts notes against the recall in.

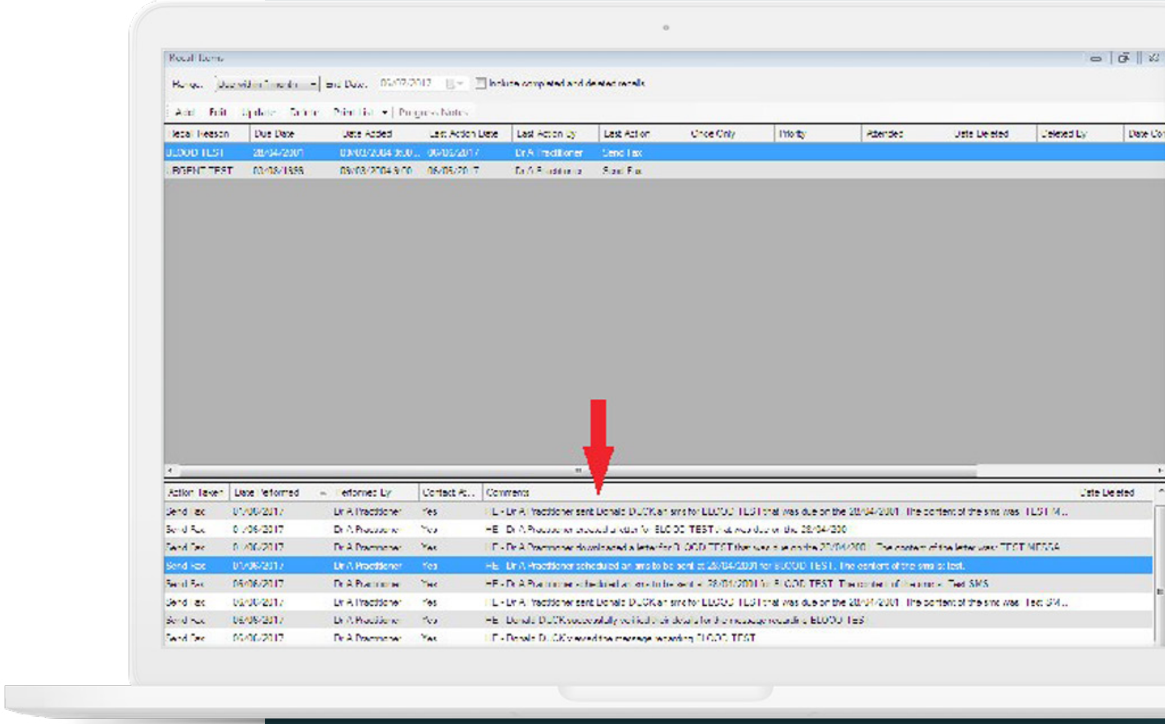
These are recorded in the ‘Recalls’ or ‘Recall Items’ section of , which can be accessed through the patient record by clicking on the ‘Recalls’ button.

All actions completed within the Healthengine Recalls system will be recorded here, including changes to the recall status and whether the patient was able to successfully verify their details and view the message for SMS recalls.

For recalls sent by letter, a copy of the letter content will be saved to the patient record in the ‘Letters’ tab.

Additionally, you will find some notes added to the ‘Progress’ tab of the patient record.

Please be aware that all notes recorded in by the Healthengine Recalls system will begin with ‘HE - ‘. This is to signify that the note was added by our system to make it easy to distinguish between these notes and any notes recorded in by your practice.



Any Questions?

For the most recent list of FAQs, you can visit Help Centre via your Practice Admin. If your question isn't answered there, feel free to get in touch with the friendly Support team at Healthengine.

1300 377 639 | support@healthengine.com.au | practices.healthengine.com.au