

# Practice Requirements for Recalls, Reminders, Abnormal Results and Urgent Discuss Cases

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**Magali De Castro**  
Clinical Director, HotDoc

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# Practice Requirements for Recalls, Reminders, Abnormal Results and Urgent Discuss Cases

This session will cover:

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- Key differences between clinically significant recalls and health promotion and prevention reminders
  - How many times should we notify patients and what types of communication channels should be used for this
  - Overview of Accreditation requirements for a practice Recall and Reminder system under the new RACGP 5th edition standards
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## Some background on Recalls & Reminders

The terms ‘Recall’ and ‘Reminder’ have historically been used together and even interchangeably in General Practice.

***But***, the important thing to keep in mind is that they represent ***very different things***, with ***different legal implications and requirements for follow up attempts, documentation of steps taken and even methods of communication.***

Every software package with a “Recall and Reminder” system, will manage abnormal results and health promotion reminders in a slightly different way... and usually, in completely different areas, ‘holding/correspondence file’ or ‘inboxes’.



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# Clinically Significant Recalls vs Reminders for Health Promotion Activities

## Recalls (for abnormal results/investigations)

- Refers to instances where **we need to get the patient back to the clinic**
  - Abnormal test results
  - Investigations such as X-rays or Specialist reports that need discussion
- Must make **reasonable efforts to contact the patient** and ensure they attend the recall appointment
- **Medico-legal requirement** to ensure **adequate contact and follow up**
- May also apply to **ensuring patients follow through with tests the GP considers will likely be 'clinically significant'**
- Ideally, at least **3 notification attempts** with a **final attempt via registered post**
- **Document each** attempt to contact the patient

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# Clinically Significant Recalls vs Reminders for Health Promotion Activities

## Reminders (for Health Promotion & Prevention)

- Mainly used for health promotion and prevention activities:
  - Immunisation reminders
  - Routine cervical screening
  - Health assessments, care plans and reviews
- There is *no legal requirement to send or follow up* a health promotion reminder



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# Is it a Clinically Significant Recall or a Health Promotion Reminder?

## Cervical Screening



It depends!

If the patient is due for *routine screening*

-> Prevention Reminder

If the patient has already had the service and the doctor wants to discuss an *abnormal result*

-> Clinically Significant Recall

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# Different Recall Types in General Practice

## Non-Urgent Discuss Appointment for abnormal results

- Ideally, *aim* to get the patient to attend *within 1 week*
- Flag the appointment. If patients *fail to attend, restart the notification cycle*.

## Urgent Discuss Appointment for significant results

- *Most critical recall type*
- The aim is to bring in the patient *within 24-48hrs*
- Use *immediate communication methods* (e.g SMS, phone call)
- *Consider phone call and SMS on the first day* attempting contact
- *Mention timeframe*, that the doctor would like them to *book an appointment today or tomorrow*
- *If unable to get a hold of the patient within 24hrs, notify the GP*



## Discuss with Nurse for patient update, information or education

- *Not usually urgent*
- More of a reminder or *note for the nurse to contact the patient for an update* on results value *or brief advice*

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# Can patients opt out of Recalls & Reminders?

## Recalls (for abnormal results/investigations)

Patients **cannot opt-out** of receiving recalls for things like abnormal test results or investigation results/reports that require discussion with the GP

## Reminders (for Health Promotion & Prevention)

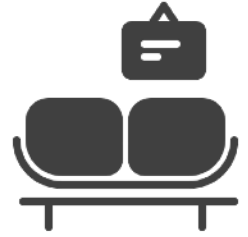
Patients **can opt-out** of receiving reminders and other health promotion information, regardless of the format (letter, call, mobile, etc).





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# Advising patients on ways to opt-out



*Inform patients that **your practice uses a Recall and Reminder system** via (Mobile Messages/Phone Calls/Letters) to notify them when they are due for health promotion and prevention services.*

*Let them know **how they can opt-out** of these notifications (Talk to reception/Clinician/Electronically, etc)*

*You can convey this with **signs in the reception/waiting room**, via your **practice information sheet**, your **practice website** and your **new patient registration form**.*

Patients can also opt-out of **certain methods of receiving information** e.g. They may opt-out of mobile notifications, but still be happy with a phone call or letter.

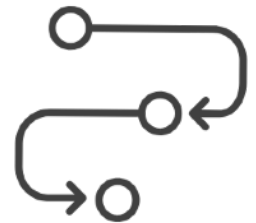
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# Accreditation Standards on Recalls

## Criterion GP2.2 – Follow-up systems Indicators

► **GP2.2 A** Pathology *results, imaging reports, investigation reports, and clinical correspondence that our practice receives are:*

- *reviewed*
- *electronically notated*, or, if on paper, signed or initialled
- *acted on* where required
- *incorporated into the patient health record.*



### You must:

- **Record** details of a **GP's review of pathology results** in the patient's health record
- Have a **process to review and manage results** received by the practice.

### You could:

- Have a **policy and/or documented procedures** for reviewing and managing results

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# Accreditation Standards on Recalls



## Criterion GP2.2 – Follow-up systems Indicators

- **GP2.2 B** Our practice *recalls patients who have clinically significant results.*

### You must:

- **Document** in the patient's health record *each attempt to contact and recall patients about clinically significant results*
- Have a **process for recalling patients** with clinically significant results.

### You could:

- Have a practice **team member who is responsible for the recall process**
- Have a **recall policy** for practice team members to follow
- Maintain **templates in a clinical software** program to trigger recalls
- **Include recall responsibilities in** relevant **position descriptions**
- Have **recalls sent through** the **clinical information system**

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# Accreditation Standards on Recalls



## Criterion GP2.2 – Follow-up systems Indicators

- **GP2.2 C** Our *patients are advised of the practice's process for follow-up of tests and results.*

### You must:

- *Document in the patient's health record what follow-up has occurred* and what treatment, if any, was required
- *Educate the practice team* members so they can tell patients about the process to receive results
- Document conversations about test results in the patient's notes.

### You could:

- Have a practice *team member who is responsible for the recall process*
- Maintain *templates in a clinical software* program to trigger recalls and reminders
- Have a *recall policy* document.

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# Accreditation Standards on Recalls

## Criterion GP2.2 – Follow-up systems Indicators

**GP2.2 D** Our practice *initiates and manages patient reminders*.



You could:

- **Document** in patient health records *when reminders have been initiated* by the practice and acted upon by the patient
- **Document the recall and reminder system**, including who is responsible for monitoring and follow-up
- Maintain **templates in a clinical software** program to trigger recalls and reminders
- **Educate the practice team** so they can tell patients about the process of sending out reminders
- Have **reminders sent through the clinical information system**.

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# Accreditation Standards on Recalls



## Criterion GP2.2 – Follow-up systems Indicators

- ▶ **GP2.2 E** *High-risk (seriously abnormal and life-threatening) results identified outside normal opening hours are managed by our practice*

### You must:

- **Give diagnostic services the contact details** of the practitioner who ordered the investigation
- Have a **process for managing high-risk results** identified **outside** of normal opening hours.

### You could:

- **Educate practice team members** about how anyone who provides diagnostic services ... can contact the practice team member/s who have access to the patient's health record
- **Provide current contact details** to diagnostic services

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# Key messages

“Failure to recall a patient may result in an *adverse outcome and the responsible practitioner may face medico-legal action.*”

“GPs are obligated to *ensure that results from all tests they have ordered are recorded and appropriately followed up* with their patients.”



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# What about tests we didn't order?



“Responsibility for the timely review and action on tests and results *ultimately rests with the health professional who ordered the test.*”

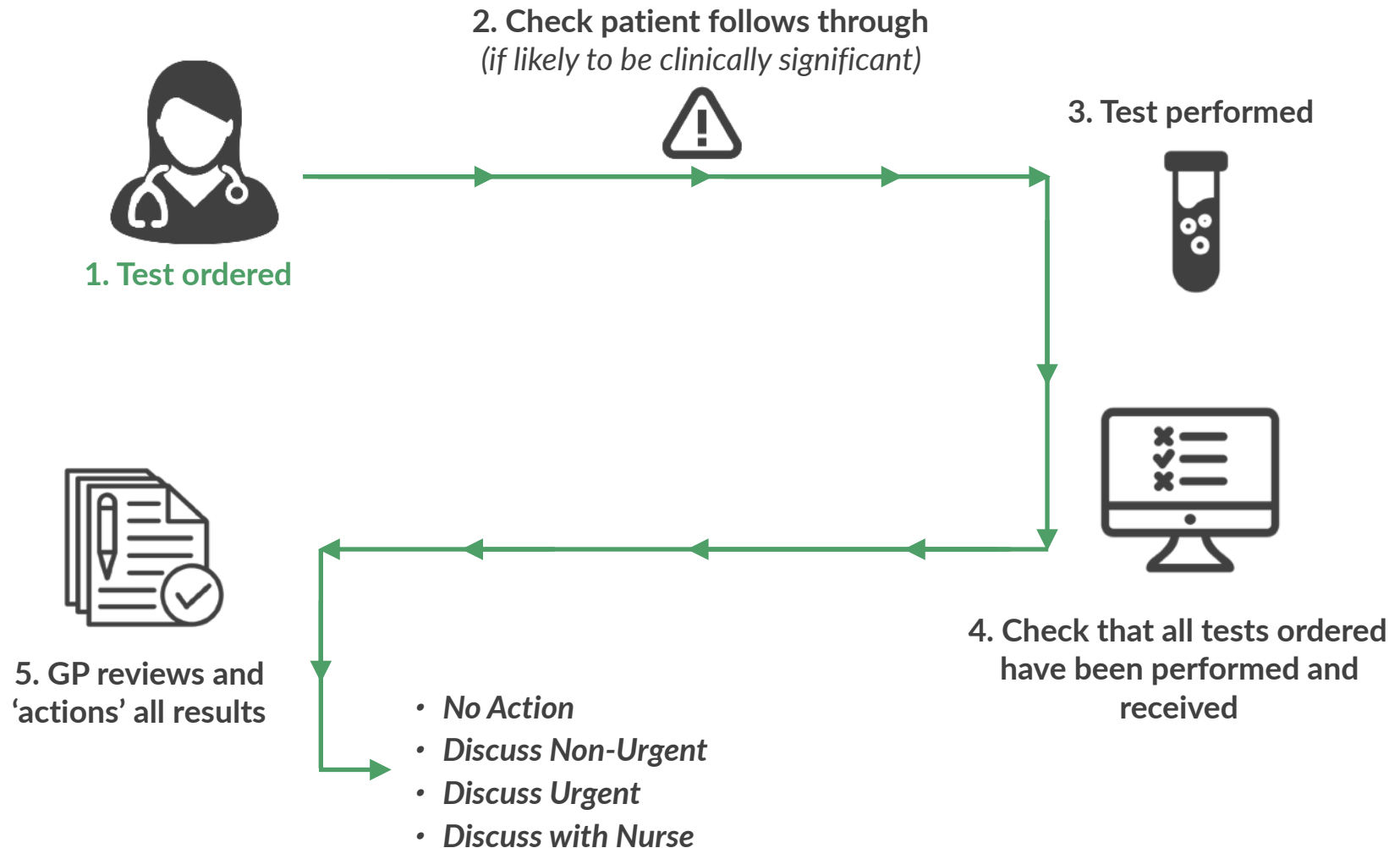
Having said that...

“It is *good practice for a GP to assume that clinically significant test results ordered by others may not have been appropriately acted on.*”

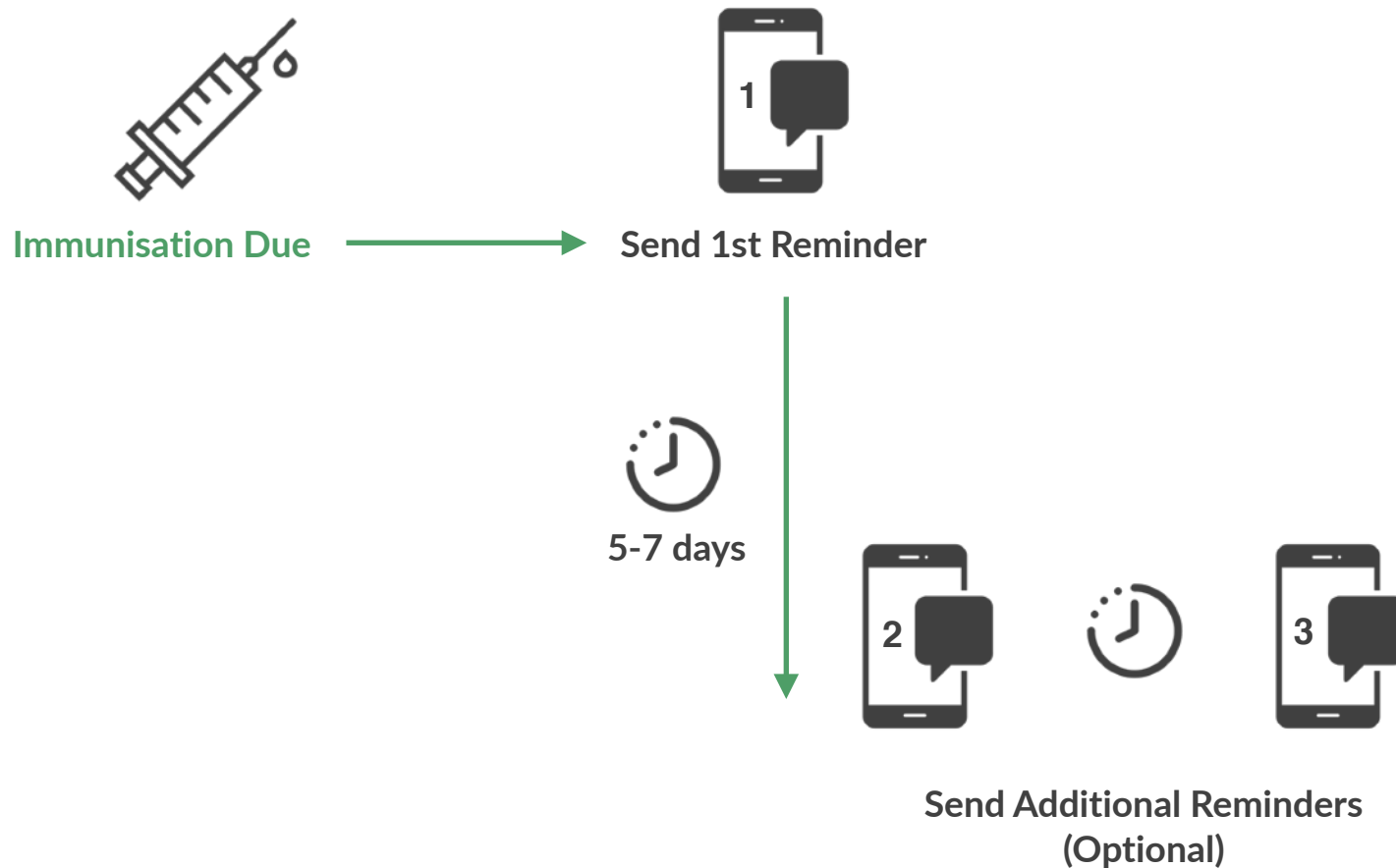
... the GP could contact the person who ordered the test and find out whether they recommend any follow-up, and/or suggest to the patient that they follow-up themselves.”



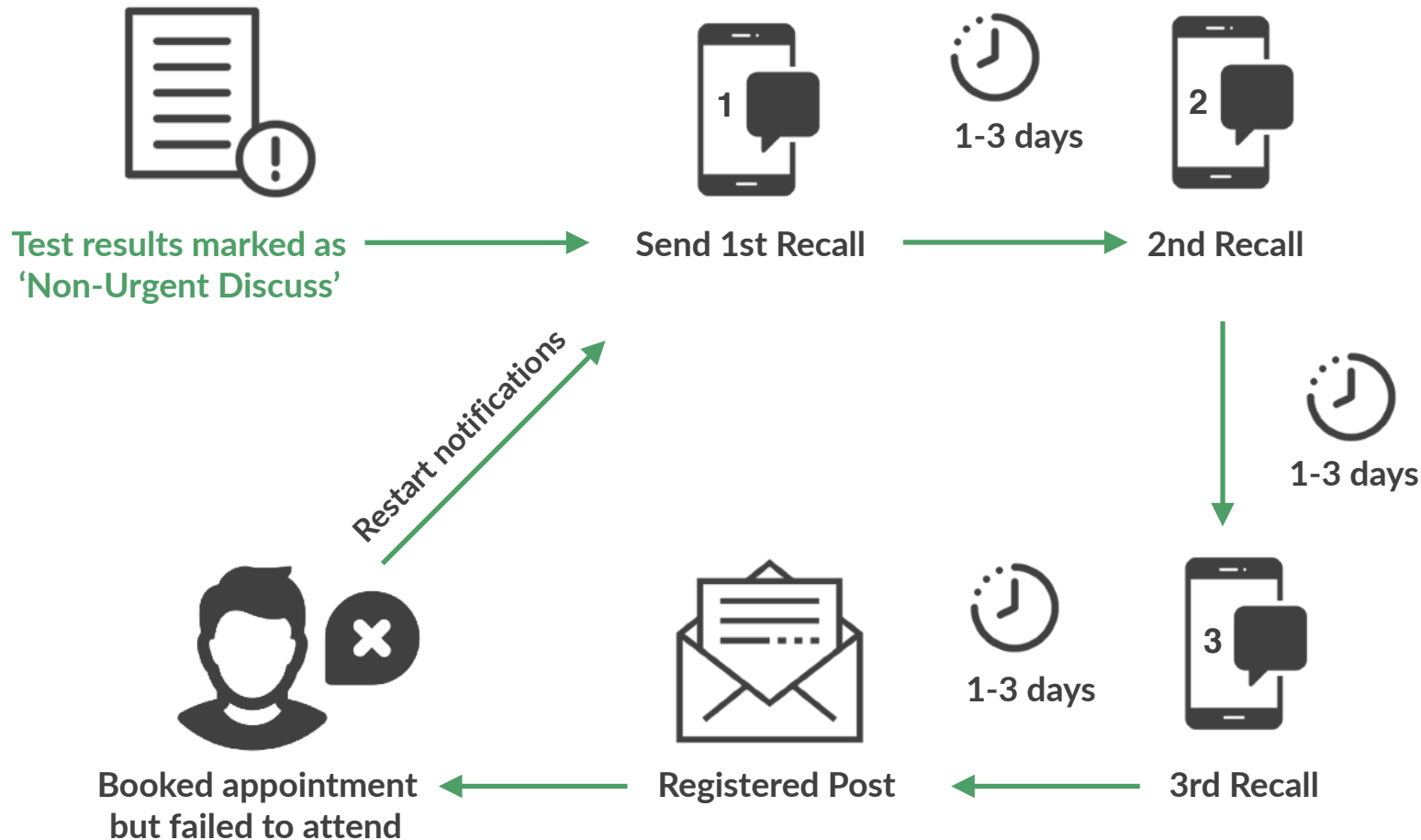
# Practice Workflow for Test Results & Investigations



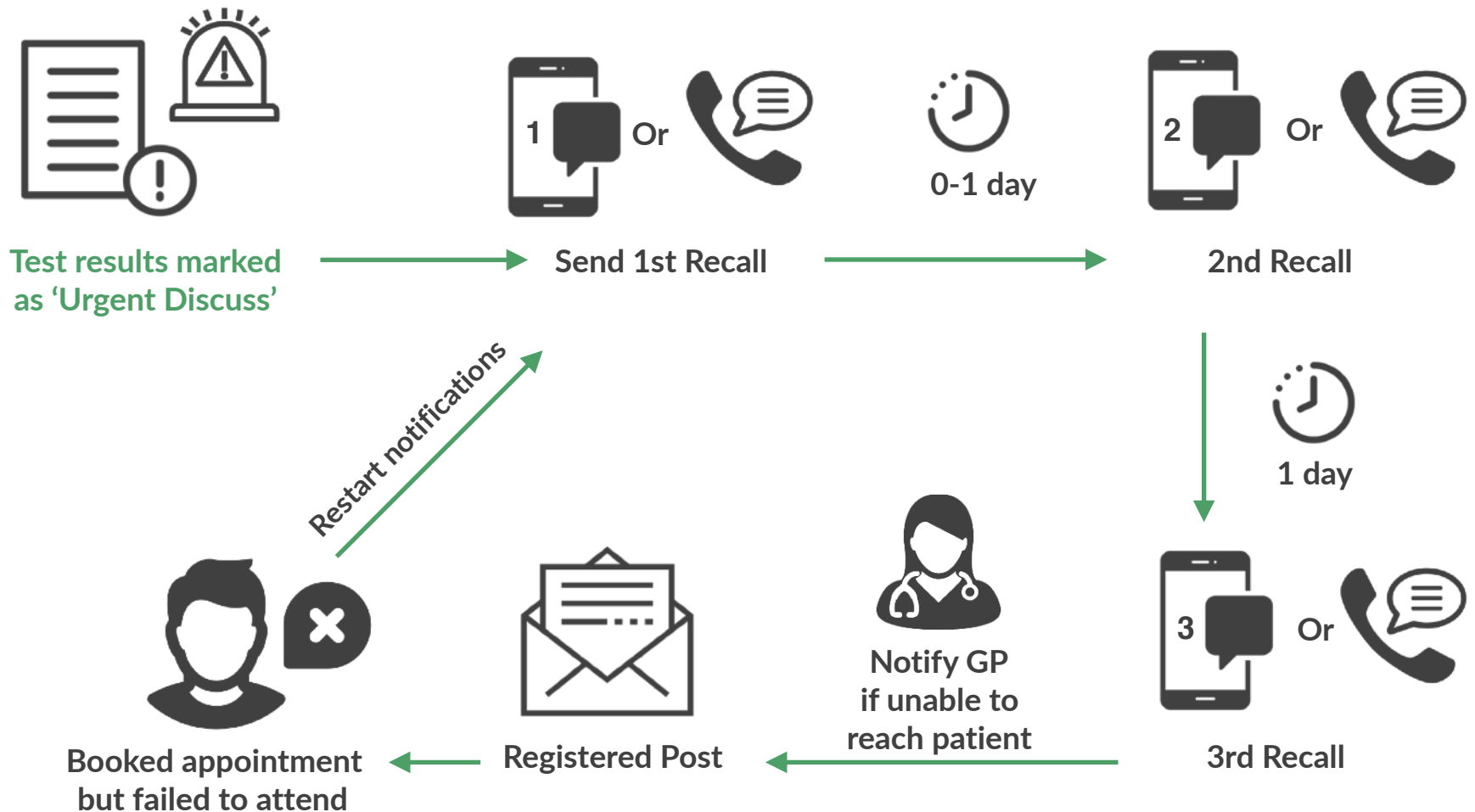
# Practice Workflow for Prevention Reminders



# Practice Workflow for Non-Urgent Discuss Results

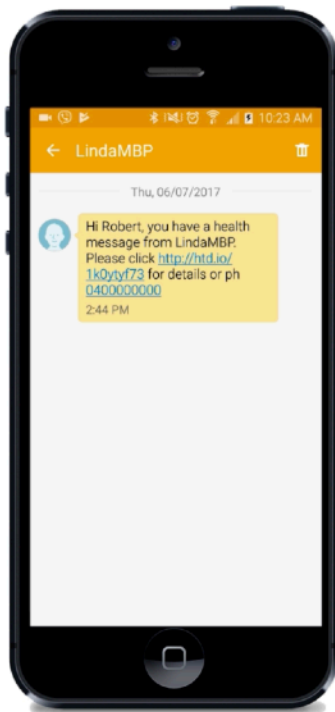


# Practice Workflow for Urgent Discuss Results

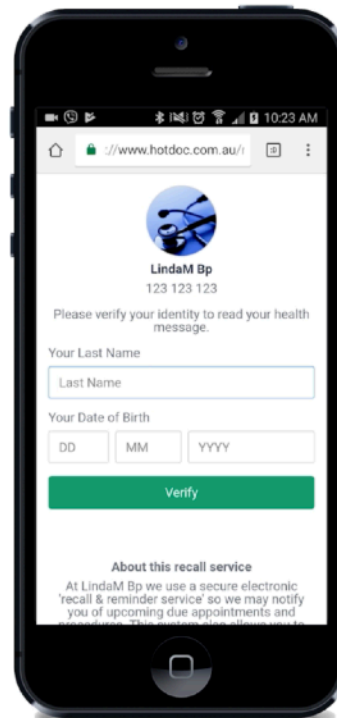


# HotDoc Recalls Tool

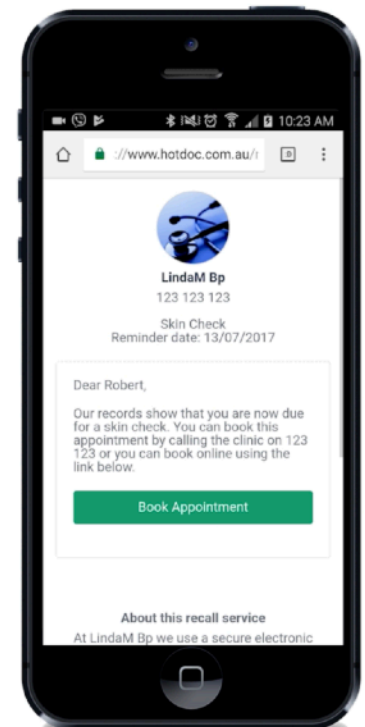
Allows practices to effortlessly send patient notifications for recalls and reminders by SMS.



1) Patient receives SMS health reminder



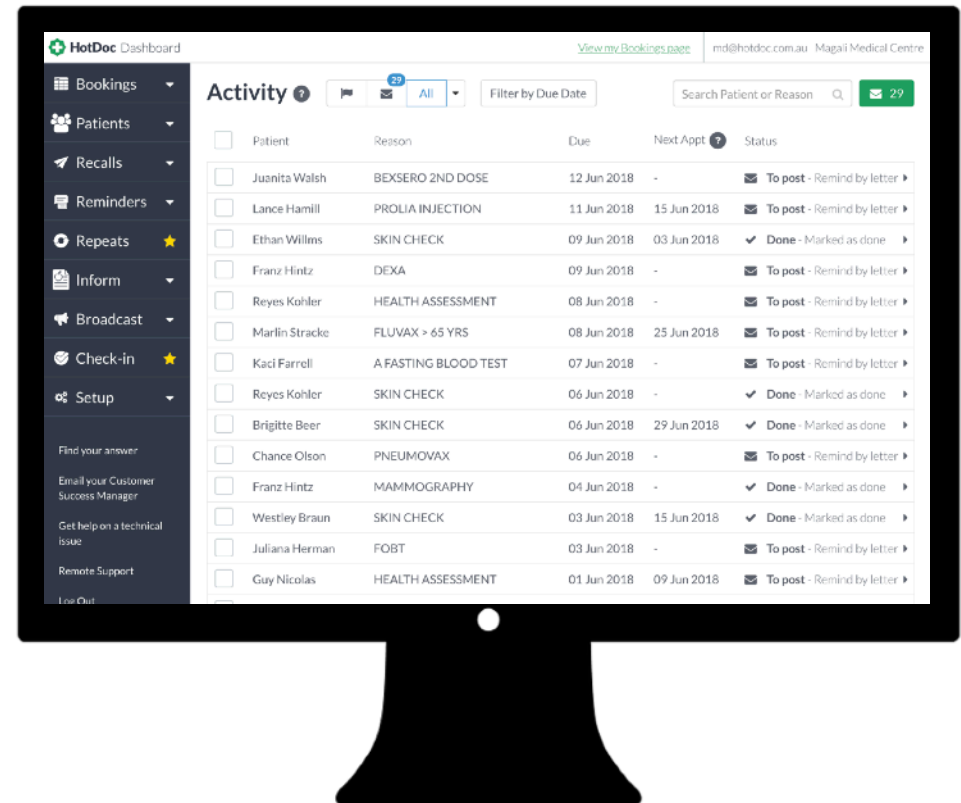
2) Patient verifies 3-point identity check



3) Patient can then book their appointment

# Practice Dashboard

- *Track status* of notifications
- *See all contact attempts*
- Check patients *received and read their notification*
- *Customise the content and number of contact attempts* by recall/reminder reason
- *Mail merge any remaining letters* for patients who were unreachable via mobile

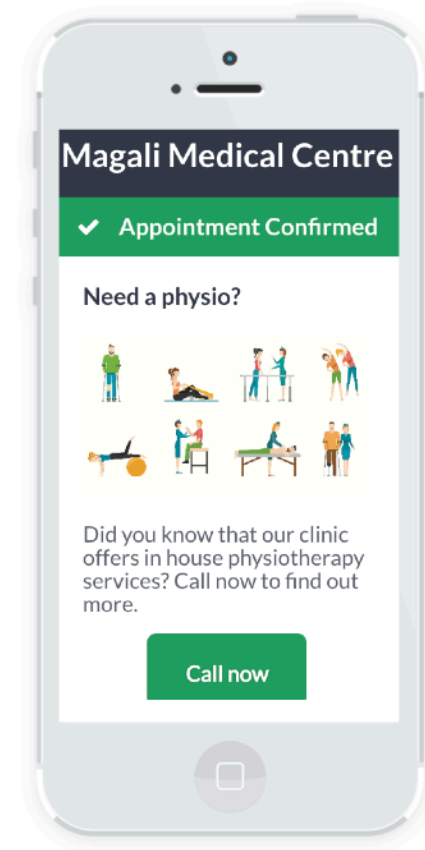


Contact attempts are automatically updated in the patient file

# HotDoc Inform

## Your Practice-Centric Marketing Tool

- **20+ tested health campaigns** to choose from *or create your own*
- **Target individuals based on their demographics**, such as age or gender, to ensure patients only see campaigns *relevant to them*
- **Decide at which stage of the patient journey you want patients to see the campaign** (ie. when a patient books an appointment, confirms a booking reminder or checks in via a HotDoc kiosk or mobile app)



# HotDoc SMS Broadcast

*Customise and send SMS' to keep patients updated* on changes to your clinic.

For instance, letting them know about *time sensitive services, such as flu clinics*, or more casual notifications, such as information on *changes to your hours of operation*

HotDoc Dashboard [View my Bookings page](#) [md@hotdoc.com.au](mailto:md@hotdoc.com.au) Magali Medical Centre

**Create Broadcast**

Customise the SMS copy and select which patient group receives the campaign.

**Name**  
Flu Clinic

**Message**  
Hi {{patient-first-name}}, Book your flu shot at {{clinic}} now. Call {{phone}} to book. {{opt-out}}

Insert placeholder ▼ Clear

121 characters | 1 credit

**Preview:** Hi Jacob, Book your flu shot at Magali Medical Centre now. Call 03 1234 5678 to book. Reply STOP to opt out



# Thank you for participating!

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Got a question?  
Email: [md@hotdoc.com.au](mailto:md@hotdoc.com.au)