Creating and Managing Recalls in Practice Reports

A simple, comprehensive recall program is built into **Vision+ Practice Reports**. Recalls can be per patient group, per disease area or there is a facility to merge co-morbidity cohorts to facilitate streamlining of letter, phone or SMS invites.

Vision+ also keeps track of the number of letters sent to the patient, automatically updates the invite status and records an entry in the patient's record.

✏️ **Note** - The **Vision+** recall functionality uses history entries to record invite letters rather than Vision recall entries.

The following steps are required before recalling your patients:

Design your Letter/SMS Template ➤ Run your Patient Target Lists ➤ Generate a Merge from the Patient List(s)
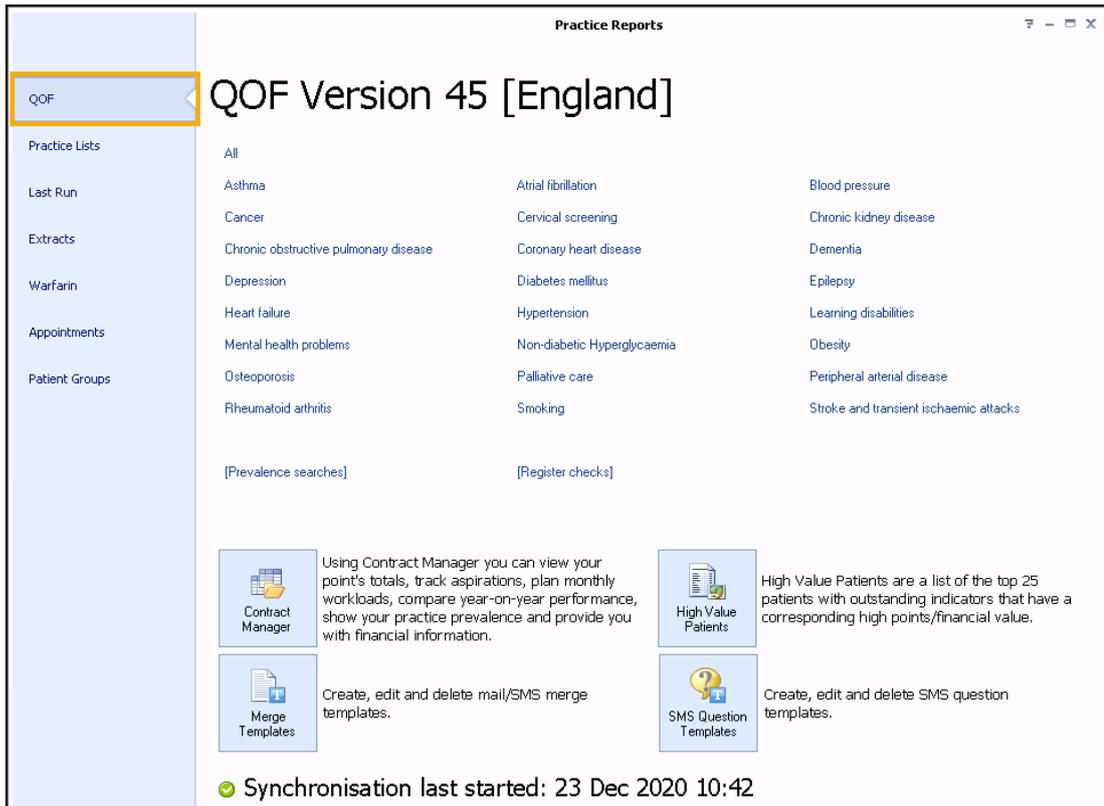
Recalls

- For designing your Letter/SMS Template, see Designing Patient Recall Templates.

- For performing a merge on your patient list, see Running a Mail Merge from Patient Target Lists.

Recalling Patients by Letter

You can send a recall letter to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF/QAIF or Enhanced areas.

To recall patients by letter:

1. **Practice Reports** opens by default on the QOF/QAIF page but you can select any report. Select the required report to run it.

2. When you select a Practice or QOF/QAIF List '*Do you want to run this practice list now for the report date dd/mm/yyyy, or schedule it to run in the next 24 hours?*' displays:
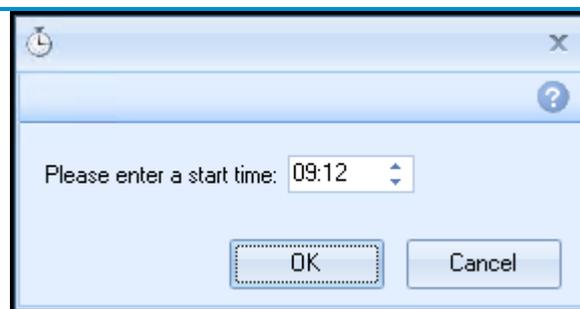
Select from:

- **Run Now** - To run the report. The report screen displays with the progress bar as normal.

🖊 **Note** - To run a report for call and recall invite purposes you must select **Run Now**.

- **Schedule** - To schedule the report in the next 24 hours, the **Schedule** screen displays, enter a start time in the next 24 hours to run the report:
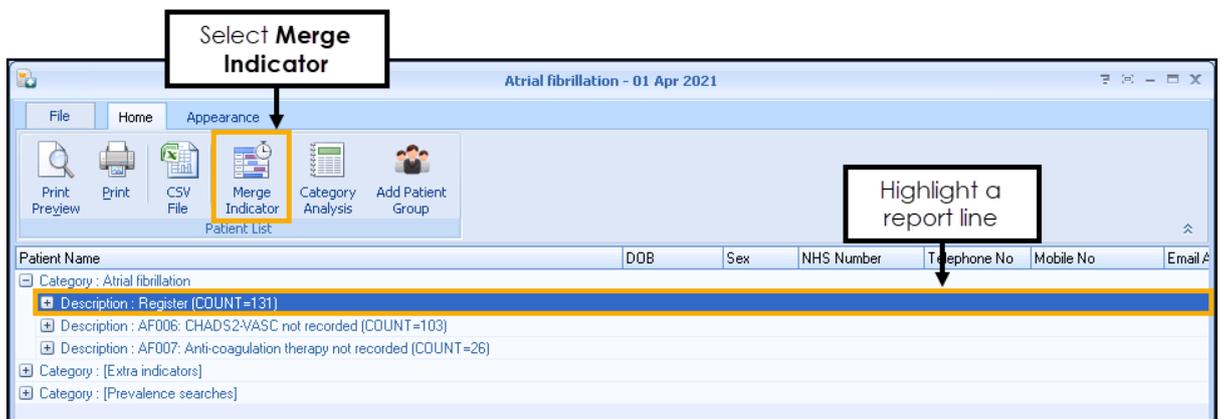

🖊 **Note** - This must be set using the 24 hour clock, for example 4pm is 16:00.

You can now continue working as usual and the report runs as per your schedule. Once a report is run as scheduled it displays in the **Practice Reports** - **Last Run** screen.
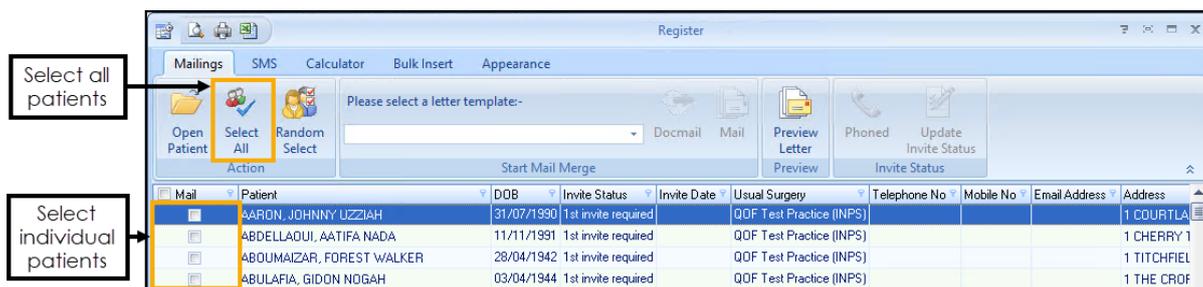
- **Cancel** - To exit the confirmation screen.

3. When the report is complete, it displays on a new tab. Highlight a cohort line of patients that you want to send a letter to and select

Merge Indicator :

4. The **Mailings** screen displays, select the **Mail** checkbox for each patient that you want to recall:

Select all patients

Select individual patients

💡 **Training Tip** - If you want to select or clear all the checkboxes, use **Select All** from the toolbar, this is useful for managing larger lists.

5. Next, from **Please select a letter template** on the toolbar, select the

required template and then select **Mail** :

Select a letter template from the list

Select **Mail**
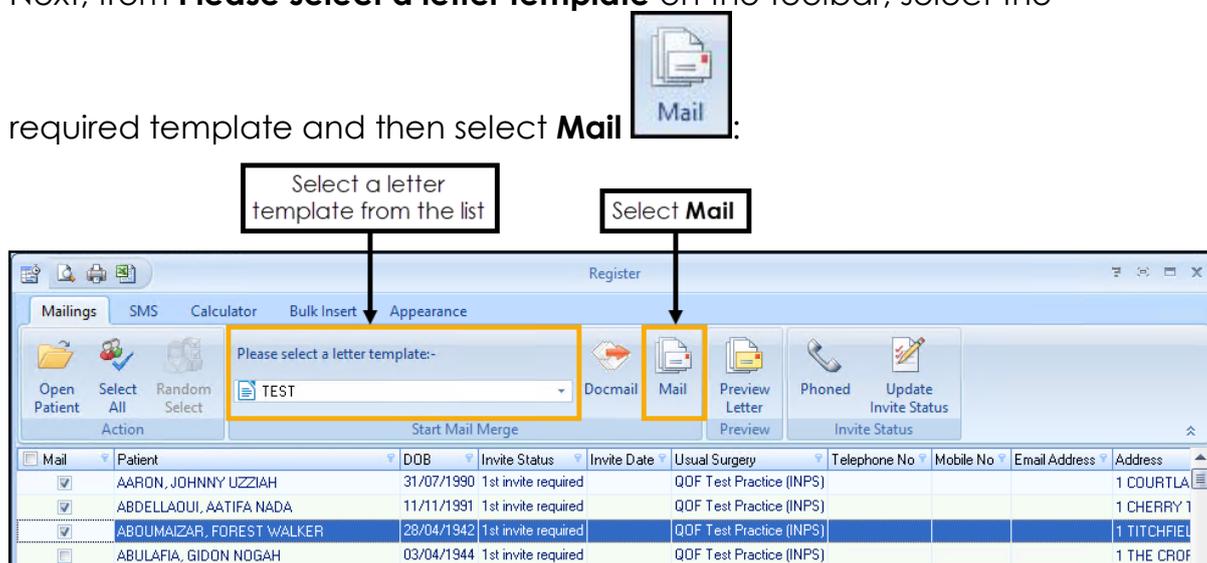
6. The recall letters open in a single document, ready to be printed. **Vision+** also adds an appropriate Clinical term into the patient's medical record to help manage the recall status. For more information on the recall status, see Managing the Recall Invite Status.

7. Print the recall letters and select **Update** to update the invite status:

8. The mail merge letters automatically save in the patient's record along with the relevant clinical code as a history entry:

Clinical term recorded and letter attached

Viewing a Saved Letter

To view a saved letter:

1. From **Vision 3** - **Consultation Manager**, find the letter in the patient's record or select it from the **Miscellaneous** folder on the **Navigation Pane**:
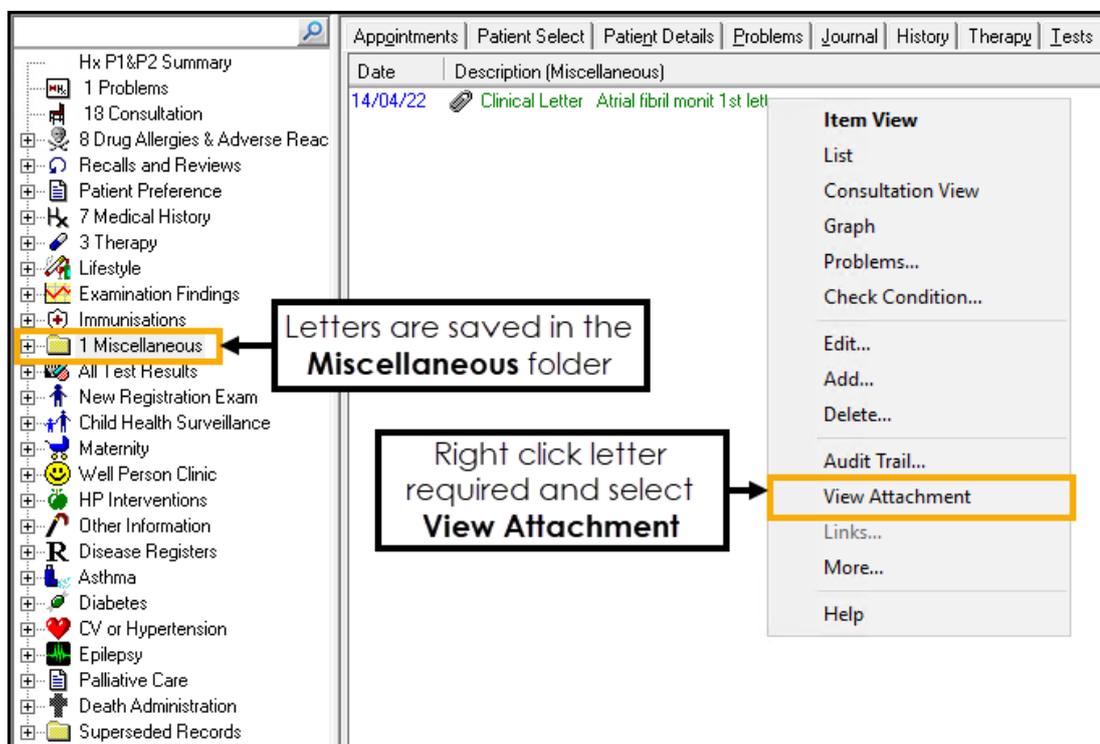
2. Right click on the required letter and select **View Attachment**.

✏ **Note** - The letters save as individual documents in the P:\attach folder.
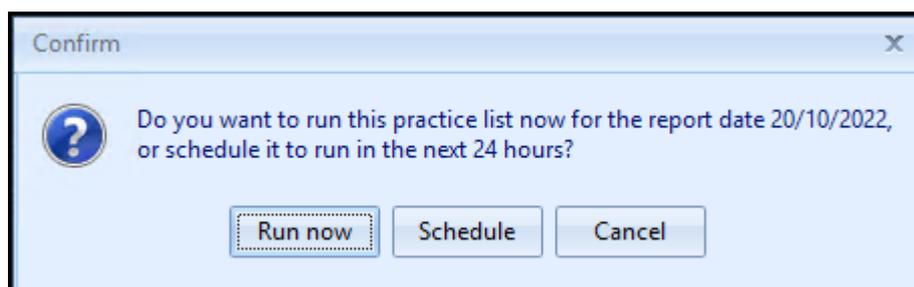

Recalling Patients by SMS Messaging

You can send a recall SMS text message to a group of patients using specific reports in **Vision+ Practice Reports**. This is particularly useful when recalling patients for specific QOF/QAIF or Enhanced areas.

To recall patients by SMS text message:

1. From the **Windows Notification Area**, right click **Vision+** [+] and select **Practice Reports**. **Practice Reports** opens by default on the QOF/QAIF screen, but you can select any report or patient group from the menu:
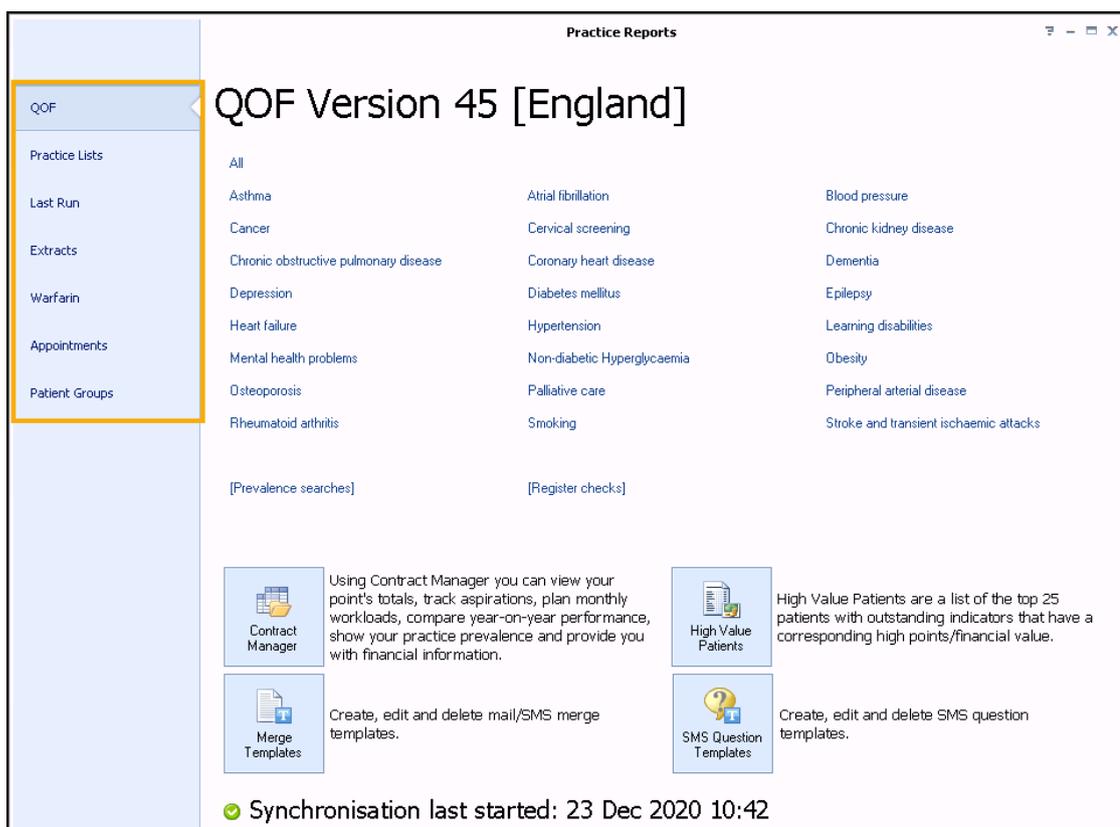
2. Select a report to run.

3. When you select a Practice or QOF/QAIF List '*Do you want to run this practice list now for the report date dd/mm/yyyy, or schedule it to run in the next 24 hours?*' displays:
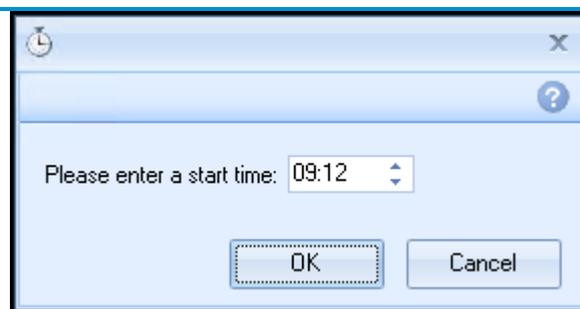
Select from:

- **Run Now** - To run the report. The report screen displays with the progress bar as normal.

Note - To run a report for call and recall invite purposes you must select **Run Now**.


- **Schedule** - To schedule the report in the next 24 hours, the **Schedule** screen displays, enter a start time in the next 24 hours to run the report:

Note - This must be set using the 24 hour clock, for example 4pm is 16:00.


You can now continue working as usual and the report runs as per your schedule. Once a report is run as scheduled it displays in the **Practice Reports** - **Last Run** screen.
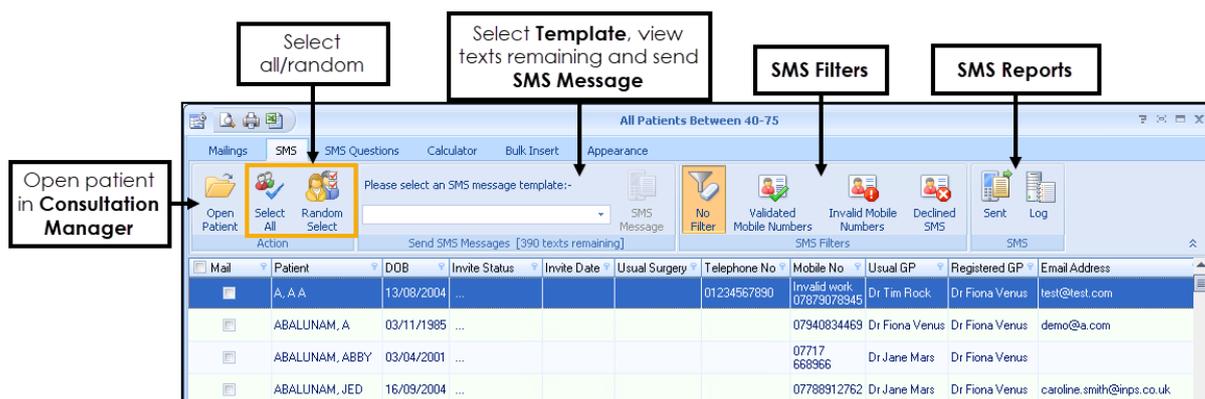
- **Cancel** - To exit the confirmation screen.

4. When the report is complete, highlight a cohort line of patients that you want to send a text message to and select either **Merge Indicator**, **Merge Category** or **Merge Patient Group**, depending on what report you have selected:
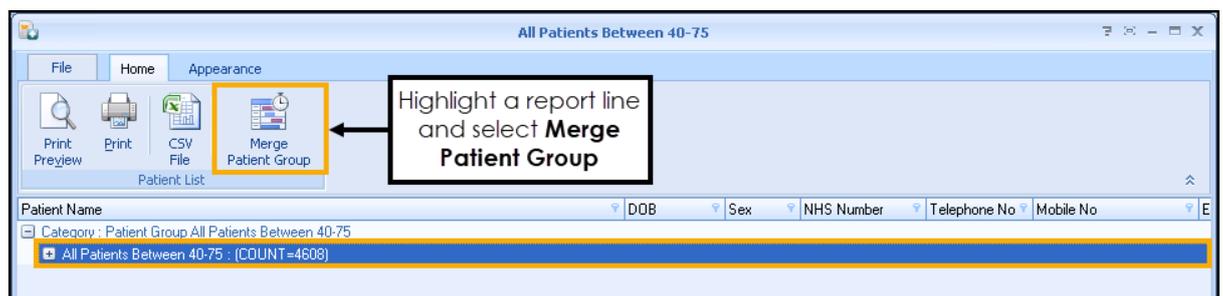
5. The **Mailings** screen displays, select **SMS**:
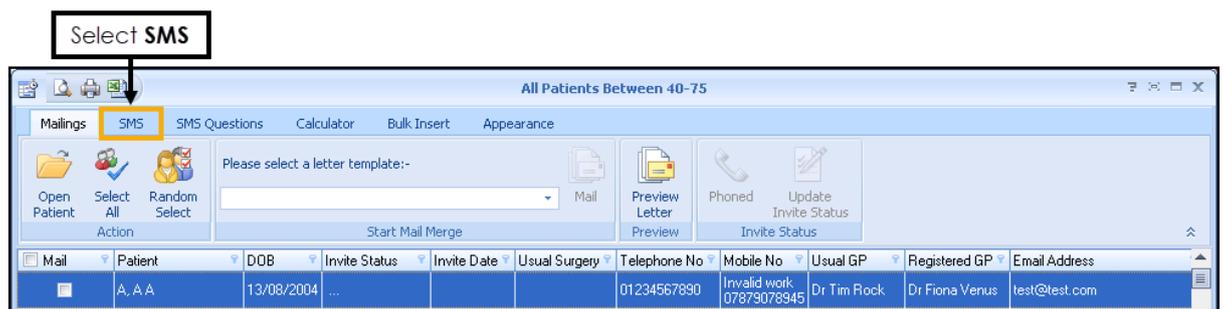
6. The **SMS** screen displays:


From here you can:

- **Open Patient** - Select to open the highlighted patient in **Consultation Manager**.

- **Select All** - Select to flag all the patients in the list with valid mobile numbers. You can then deselect as required.

- **Random Select** - Randomly selects patients in the list. You can deselect/select as required.

- **Please select an SMS messages template** - Select the predefined template required (the content of the text message).

Note - You have different SMS templates available for QOF/QAIF and non-QOF/QAIF **Vision+** templates. If you cannot see one of your SMS templates, it may be attached to another practice list.

- **Send SMS Messages (nn Texts Remaining)** - Displays how many text messages are available to your practice. If you have selected more patients than the balance in your SMS account, you must either:

    - De-select patients down to the account balance, or

    - Purchase more SMS messages.

Note - For practices that have an EE contract, the send SMS messages is automatically maintained for you and displays the message '*EE providing texts*'.

- **SMS Filters** - Filters the patients by:
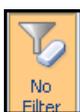
    - **No Filter** - Selected by default, all patients within the patient list display. Patients with no mobile number, an invalid mobile number or who have opted out of the SMS text messaging service display in the no filter list but you cannot select them.
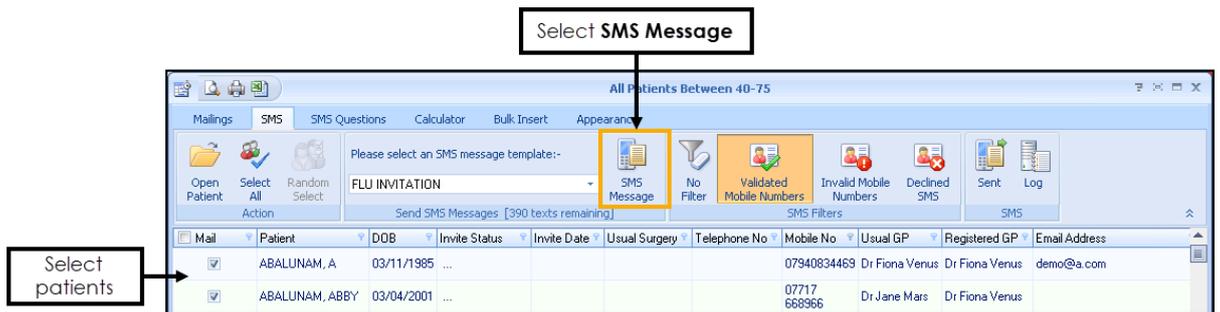
- **Validated Mobile Numbers** - Select to display patients with valid mobile number only.

- **Invalid Mobile Numbers** - Select to display patients who have an invalid first mobile number only.

- **Declined SMS** - Select to display patients who have opted out of SMS text messaging.

💡 **Training Tip** - You can use the column headings to sort the report list, for example, if you want to display patients with mobile numbers at the top of the list, select the mobile number column heading.

7. Place a tick against the patients you want to send a message to or select **Select All**:


8. Select **SMS Message** to send the messages to the selected patients.

💡 **Training Tip** - If you are not on an EE contract you cannot send text messages unless your SMS account is in credit. The status bar above the patient list shows how many SMS messages remain. If you have selected more patients than the balance in your account, **SMS Message** is unavailable. You must either de-select patients down to the account balance or purchase more SMS messages.

9. If the patient has already received an appointment or recall invite in the last 28 days, the following message displays. Select **Yes** to continue:
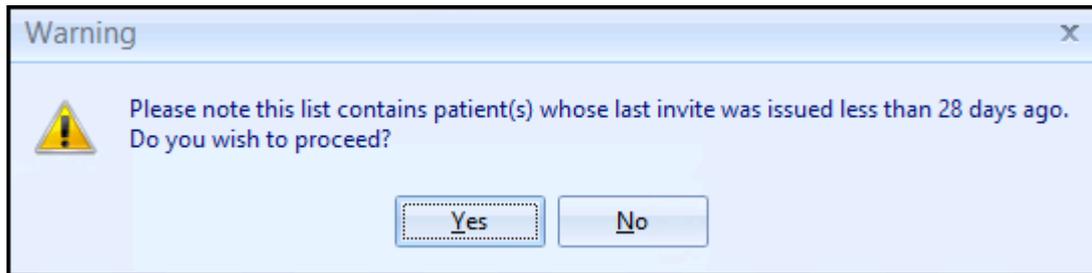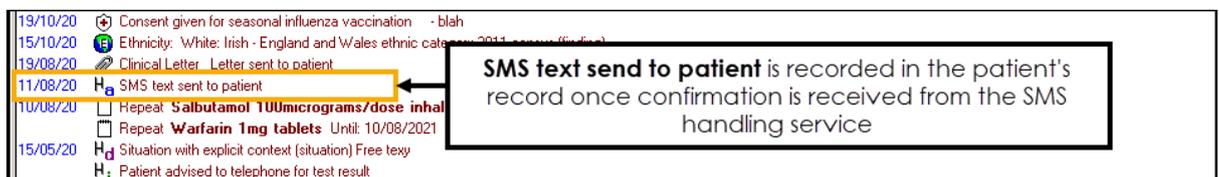

10. The invite status automatically updates on the **Mailings** screen, displaying in the **Invite Status** column:

11. Once **Vision+** receives confirmation from the SMS handling service that the message is sent, a clinical term automatically records to the patient's record:

💡 **Important** - If the message fails to deliver, no entry is made in the patient record and the invite status reverts back to the previous status.

Here is an example of a recall SMS text message received by a patient:
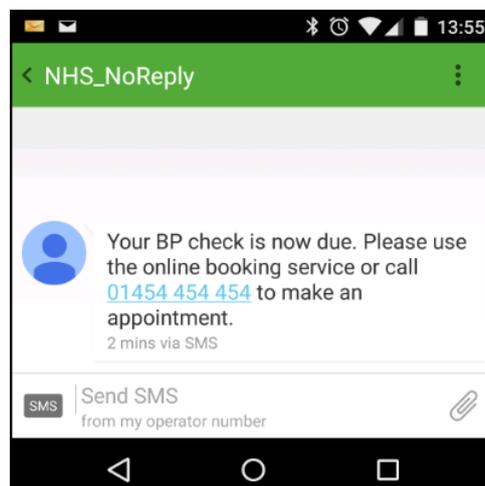
Please note the following:

- Where patients share the same mobile number and are within the same group for SMS invitations, only one SMS message is sent and charged for, but both patient records update with the clinical term.

- Patients who receive SMS text messages whilst abroad are not charged.

- The following SMS reports are available:

  - **Sent** - Select to display a list of patients who have been sent a text message along with details of the message description, date sent and message status.

  - **Log** - The **SMS Log** is for support purposes and displays sent, invalid and declined messages for all sent messages. The file name contains the date and time the SMS messages were sent.

More Information

Select the links below for more information:

- Managing the Recall Invite Status
- Adding Codes to Multiple Patient Records
- Mail Merge All QOF/QAIF Categories
- Mail Merge All Categories
- Recalling Patients by Phone