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# FLEX

ADVANCED PRACTICE MANAGEMENT SOFTWARE

## User Guide to Recalls

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## Recalls

The Timeline on [The Home Screen](#) shows Patient Recall (Reminder) notices due to be sent out up to a certain date (default is today's date – depending on your role, you may be able to change the date). The Columns show the method of contact (Letters, Emails etc.) and the Rows show the type of notice due to be sent (Marketing, Recall, etc.)

Timeline

Show items to be sent up to  




Type	Letters	Emails	SMSs	Postcards	Phone	Total
Recall	412	0	0	0	0	<b>412</b>
Marketing	0	0	0	0	0	<b>0</b>
Notifications	0	0	0	0	0	<b>0</b>
Totals	412	0	0	0	0	<b>412</b>

By double-clicking on the “**Recall**” row, the window shown below will open.

Close Include All Report

**Timeline items due to be sent**

Date Up to: 16/12/2021 Patients: Show All

Branch: Malvern

Type: Recall, Marketing, Notifications

Contact Method: SMS, EMAIL, LETTER, TELEPHONE

Docmail Info: Est. cost: £0.00, PAF Inv.: £0.00, Balance: £0.00

SMS Credits

Timeline Count: 412

Letter Format: Webpost

Timeline Items to be Processed Items Sent

Px Ref #	Title	Px Firstname	Px Surname	Age	Scheduled Date	Recall Date	Recall Category	Contact Method	Template Name	Branch	ID	Include	Done
15788	Miss Alice Pavlu	Alice	Pavlu	6	05/11/2021	05/08/2021	6 Month Recall	LETTER	Rem2	Malvern	4955	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15578	Mrs Ellen Maycock	Ellen	Maycock	90	05/11/2021	05/08/2021	6 Month Recall	LETTER	Rem2	Malvern	4831	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15301	Mrs Christine Job	Christine	Job	76	05/11/2021	05/08/2021	12 Month Recall	LETTER	Rem2	Malvern	4716	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15151	Miss Imogen Jones	Imogen	Jones	8	05/11/2021	05/08/2021	6 Month Recall	LETTER	Rem2	Malvern	4676	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12203	Mrs Jean Powell	Jean	Powell	81	05/11/2021	05/08/2021	12 Month Recall	LETTER	Rem2	Malvern	3966	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9265	Mrs Betty Halstead	Betty	Halstead	76	05/11/2021	05/11/2021	12 Month Recall	LETTER	Rem1	Malvern	3432	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5309	Mrs Sheila Andrews	Sheila	Andrews	83	05/11/2021	05/08/2021	12 Month Recall	LETTER	Rem2	Malvern	3045	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15541	Mr Robert Palmer	Robert	Palmer	65	06/11/2021	06/08/2021	18 Month Recall	LETTER	Rem2	Malvern	4814	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15403	Mr Don Hawkins	Don	Hawkins	64	06/11/2021	06/08/2021	24 Month Recall	LETTER	Rem2	Malvern	4754	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15379	Mr Michael Hall	Michael	Hall	52	06/11/2021	06/11/2021	6 Month Recall	LETTER	Rem1	Malvern	4743	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Patient Summary

Tel H: Tel M: Tel W: Email:

Tel. Hist.:

## Timeline Items to be Sent

The window **"Timeline items to be Processed"** (shown above) will populate with all the recalls due to be sent out. Results can be sorted by clicking the column headers and searched by using the small magnifying glass on the top of each column header.

Recalls can be individually included or excluded by ticking / unticking the **Include** checkbox, or the **Include All (Exclude All)** button can be pressed.

To select multiple reminders, hold down the Ctrl key on the keyboard and single left-click the entries: tick / untick the ones you wish to print.

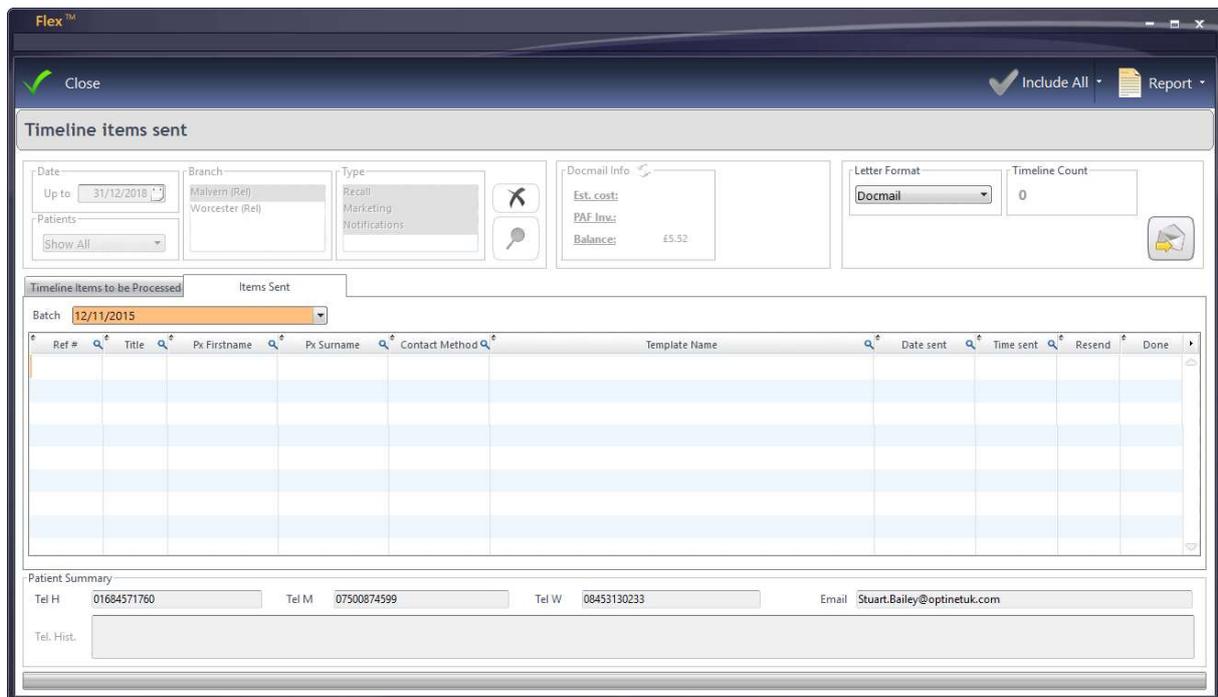
To select blocks of reminders, hold down the Shift key on the keyboard and single left-click the first and last entries of the block you wish to print.

You can choose your recall destination under **Letter Format**. Here, you can select whether your recalls are going to be **Printed**, **Exported** (which goes into a CSV file you can use), directly to **Webpost**, **Docmail** or to **Labels**. The only size label that we cater for is Avery L7160 (or compatible sheets of 3 labels across by 7 labels down).

Press the Envelope button shown towards the top-right of the screen to send the letters / emails / texts. *Please remember to have your printer ready, if you print in practice.* Once a batch has been dispatched, they are moved to **"Items Sent"**.

Emails and SMS messages are sent automatically, a list of telephone reminders can be printed using the **Report** button, and your reminder letters will go to the practice.

If you need to reprint some reminders, clicking the **Items Sent** tab brings up the previously sent recalls. These can be sorted by selecting a Batch from the drop-down menu. This is shown below.



When you are happy, the Resend button appears where the Send button previously was. When you are happy with your work, press **Close**.

## Reminders and Recalls Setup

There are three inherent considerations for the setup of recalls and reminder:

- How to set up the types of templates to be sent (i.e. the content and style of letters, emails and text messages).

These templates are found under Menu > Setup > Communication

The schedules of the templates to be sent (i.e. on the due date, and the increments of weeks / months and their methods going forward).

These templates are found under Setup > Examination > ST/CL Recall.

- The number of days before a Patient's recall due date that the reminder is generated (the scheduled date) – found in setup>Branch>timeline