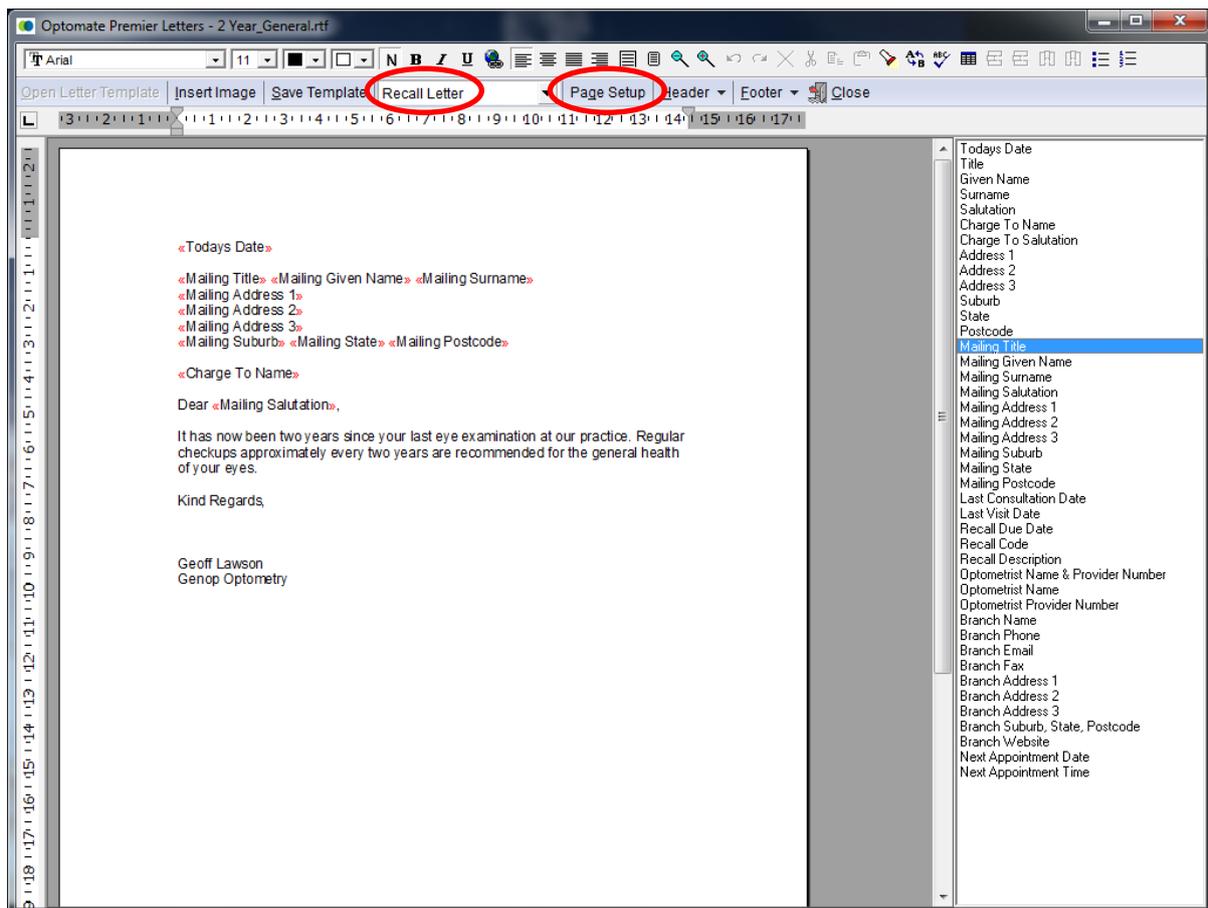# Patient Letters and Recalls

Setting up Patient Recalls with Optomate Premier Series

Recalls are triggered by the Patient information on their 'Recalls' tab. The two recall sections run independently of each other, so you can use the first recall section as the standard 24month Recall and the second recall section for a special recall such as a 6 month Glaucoma Recall or a Contact Lens Recall.

Step A: Setting up a Patient Letter or Recall

Since the introduction of Optomate Premier Series, the format of recalls can now be customised within the Optomate program without the need to merge into an external word processing program.

To create a Recall Letter, go into: **Setup ▶ General ▶ Letter Templates**.

1. Change the Letter type to '**Recall Letter**' by clicking on the drop-down list as circled above.

2. Click the [Page Setup] button and set your paper size.

3. Include the mailing details at the top of the letter
   *by default you should always use the 'mailing' fields to ensure that a patients' mailing address is used (if no mailing address is entered for a patient, their general address will still appear).
   *Also, include the 'Charge to Name' field which will print "*In relation to (patients' name)*" if there is a 'Charge To' person entered on the patient file (i.e. In the case of a child patient).
   To add fields, simply double-click on the item in the right menu, ensuring that you include a space between each field, for example:

<<Mailing Title>> << Mailing Given Name>> << Mailing Surname>
<<Mailing address 1>> <<Mailing Address 2 >> << Mailing address 3>>
<<Mailing Suburb>> << Mailing State>> <<Mailing Postcode>>

Below this you can type the body of your letter. To change the type face or any other formatting, select the text you wish to change followed by your desired settings.

Once you are happy with your Recall letter, click on the [Save Template] button at the top and save in the 'Recalls' folder.

If you want to edit an existing letter, click [Open Letter Template] and select your document. Simply save the template with the same name when you are done. If you want to use an existing letter then alter it for a different template, make the changes then save with a NEW name.
*Remember to create a second letter for any recalls that include a 'Subsequent Recall'.

Setting up Recall Types
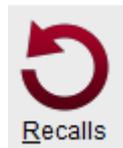
The next step is setting up the Types of recalls you require.
To begin, click on the **Recalls** button at the bottom of the main screen.

1. To create a new recall type click on [New]. Enter a new '*Code*' and '*Name*'.

2. Set the '*Number of Months before Initial Sent*' - i.e. for a 2 year recall, enter '24' - this is the amount of months before a recall will be due.

3. If you intend to send subsequent recalls, enter the '*Number of Subsequent Recalls*', then set the '*Number of Months Apart*' – (how many months to wait before the subsequent recall is sent).

4. Click on the browse button for 'Initial Document Location', as circled in the image above, and locate the letter you created for this recall type. Do the same for the 'Subsequent Document Location' if required. Save and Close.

5. If you intend to send some of your recalls via email, enter in the 'Initial Email Subject' and 'Subsequent Email Subject' fields.

Add a Patients Recall Type(s)

From the Patient file, go to the 'Recalls' tab. Select the type of Recall(s) required for the patient. As shown in the image below, patient Master Varis Hyslop has been setup to receive the 2 Year General Recall. When the 'Next Recall Due' date lapses the date will be highlighted in red and the patient will be automatically added to the 'Recall Listing'. You can manually manipulate the Recall date to make this happen at a more suitable time if needed.

The 'Number of Recalls Sent' lets you know how many recalls the patient has already been sent. The 'Date of Last Recall' is the date the patient was last flagged as having a recall sent to them.
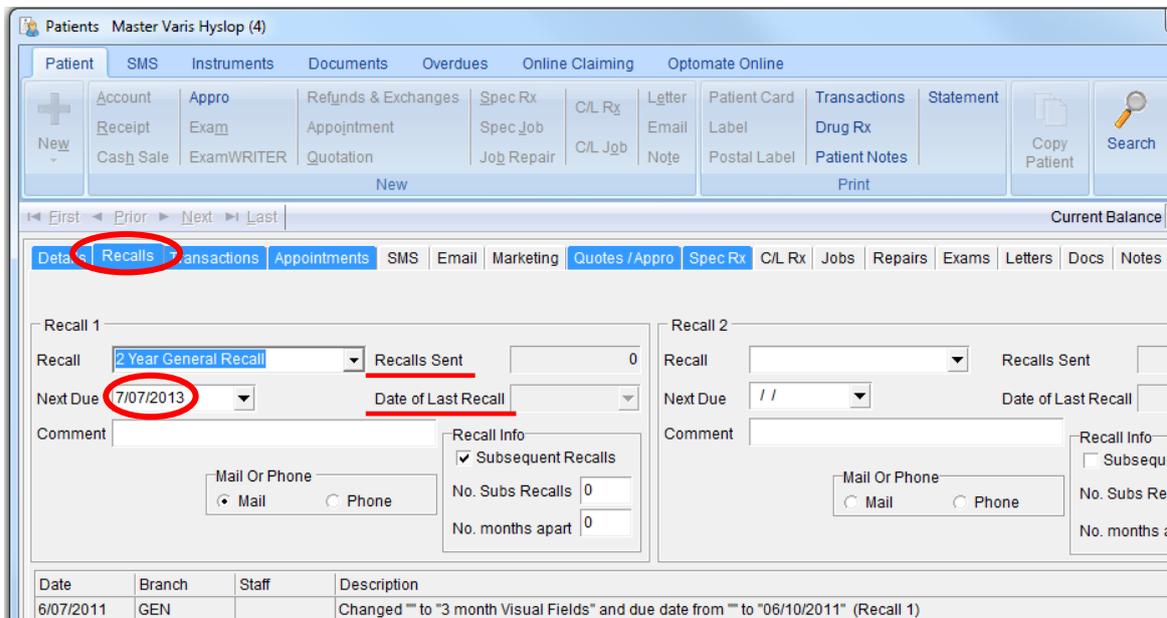
Printing Patient Recalls
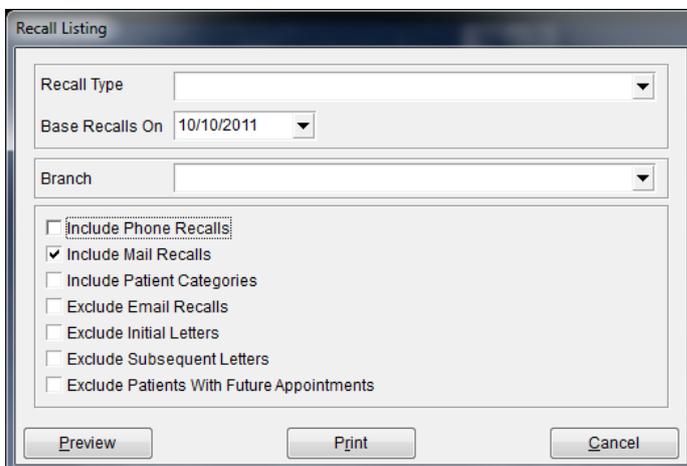
Now that the setup is finished you can print your Recall Listing and Recall Letters.
To begin, click on the **Recalls** button at the bottom of the main screen.

1. First click on the [Recall Listing] button and either Preview or Print so that you can check that the listing is correct.

2. Next click on the [Recall Letters] button. A new window will open where you can specify which recalls you wish to print based on your preferences.

Step B – Printing the Letters

Patient Letters

Follow the procedures in Step A to create a Patient Letter Template, now produce your patient letter.

1. Go into the Patient file and click on the [Letter] button at the top of the screen.

1. Click on [Open Letter Template]

2. The Merge Fields will automatically update with the patient details.

3. Make any changes required then click [Save Letter] – the letter will automatically be named the Patients' last name, followed by Patient Number, today's date, and then letter number.
**e.g.** '*SMITH112_220807_1.rtf*'

To open previous Patient Letters, go to the 'Letters' tab for the required Patient and double click on a letter in the list.

Marketing Letters

Once you have created a Marketing Letter Template following the procedure in Step A, you will need to create a new Marketing List to target specific Patients:

1. Click on the Marketing icon from the main screen.

2. Click on **Marketing List - New**
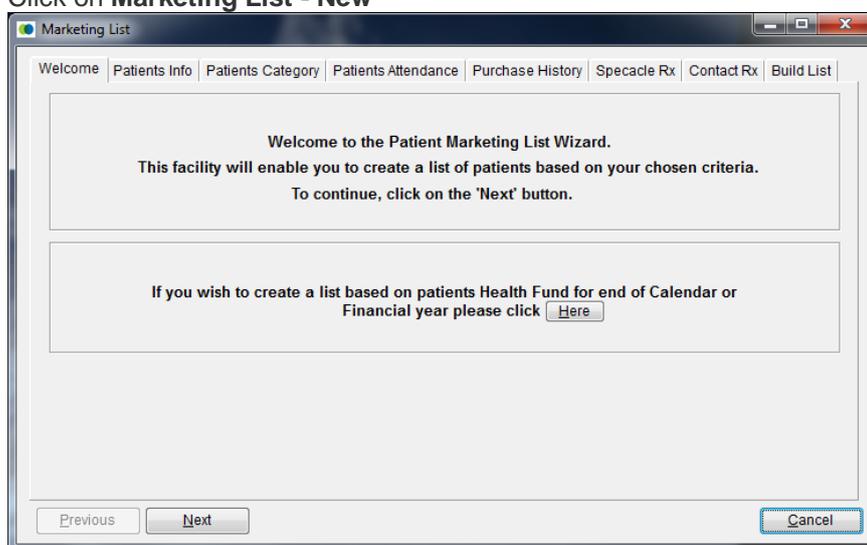
The Marketing Wizard will open. Click on the tabs on the top to open the relevant areas requiring any specific information you want to base the marketing on, for your marketing list. When you have completed all of the required information, click on the "Build List" tab. Click "Build list at the bottom of the window.

3. The Marketing Wizard will display the Patients in the list.
By default All Patients will be ticked to Include in the Marketing list.
You can un-tick any that you don't want to include.

4. Specify a **List Name** and **List Description** that will be referenced in the following step then click [Done].

Create the Marketing Letters using the existing Template and Marketing List:

1. Click on the Marketing icon from the main screen.

2. Click on the [Marketing Letters] button.

3. Select the **Marketing List** and the **Letter Name** and click [Print].

Overdue Account Letters

Once you have created the Overdue Account letter templates following the procedures in Step A, you will need to go into setup and link the corresponding letter to each Overdue Account Type:

1. Go to *Setup ► Patients ► Overdue Messages*

2. Click on the [New] button. The window as shown, below will open.


3. Enter the Number of Days overdue, along with a Description.

4. Click on the Browse button (as circled) and locate the corresponding Letter Template.

5. Save and Close.

The Overdue Messages Setup screen will display a list of the Overdue Types you have setup in Optomate. To print a list of these, click the [Print Overdue Messages] button in the Print section.
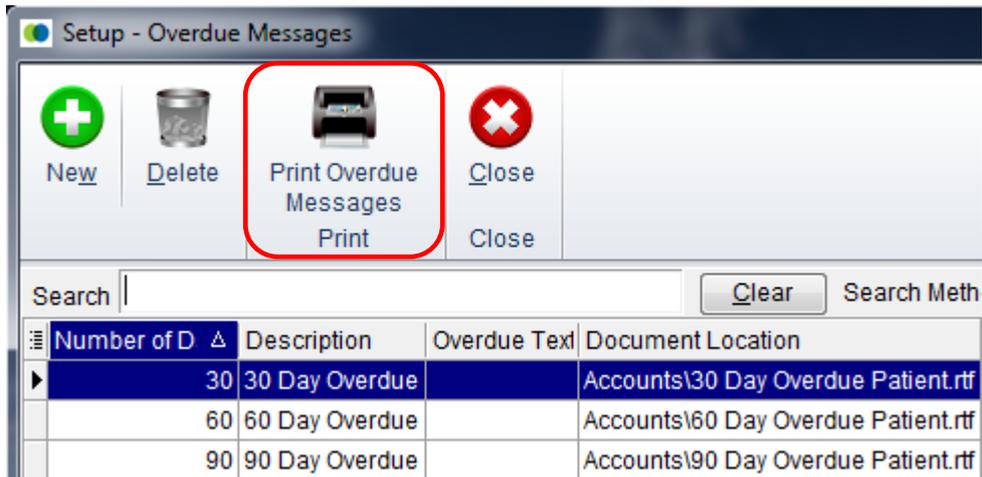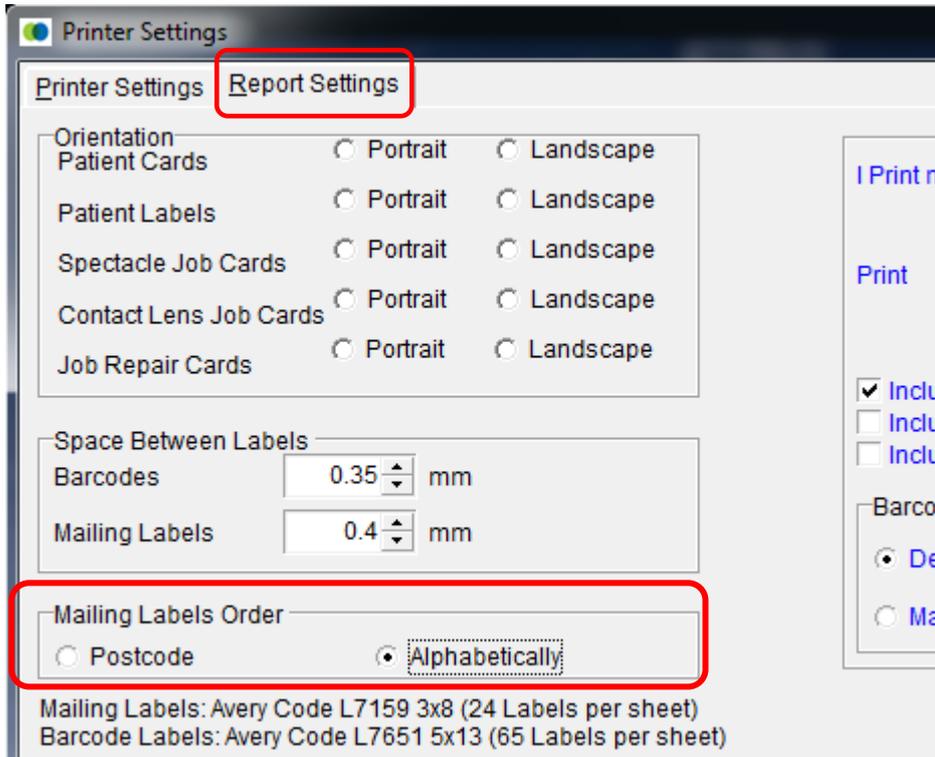

Printing the Overdue Account Letters

1. In the Patient screen, Click the "**Overdues**" Tab (top row) and select **Print Overdue Letters**.
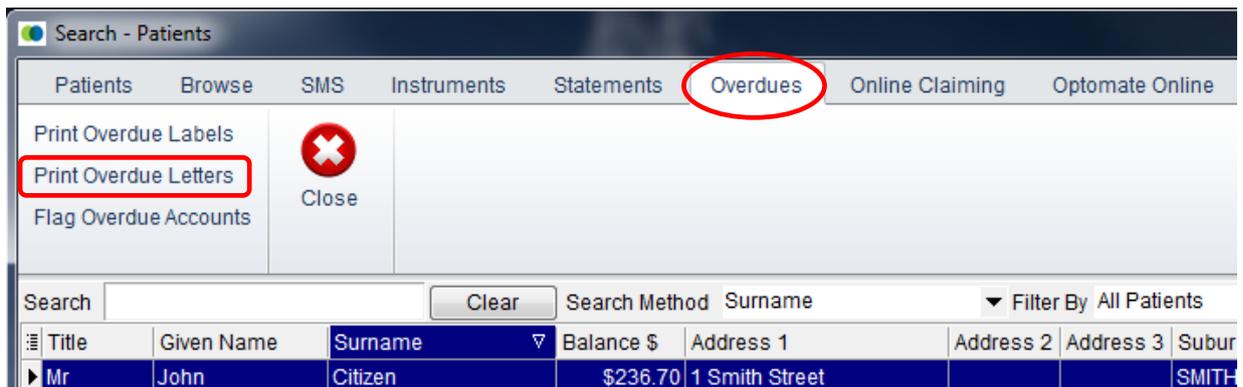
2. Once the letters have been printed, you can print out the Patient Labels for sending. Click the "Overdues" Tab (top row) and select **Print Overdue Labels**.

Labels will be printed in either Alphabetical Order or Postcode Order. To alter your order preference, go into *File* ► *Printer Settings*, click on the **'Report settings'** Tab then adjust the 'Mailing Labels Order'.

3. Once you have printed the Letters and Labels, you need to Flag the letters as sent. Click the "Overdues" Tab (top row) and select **Flag Overdue Accounts**.

IMORTANT:
Flagging cannot be reversed. Please ensure that all letters are sent before flagging.
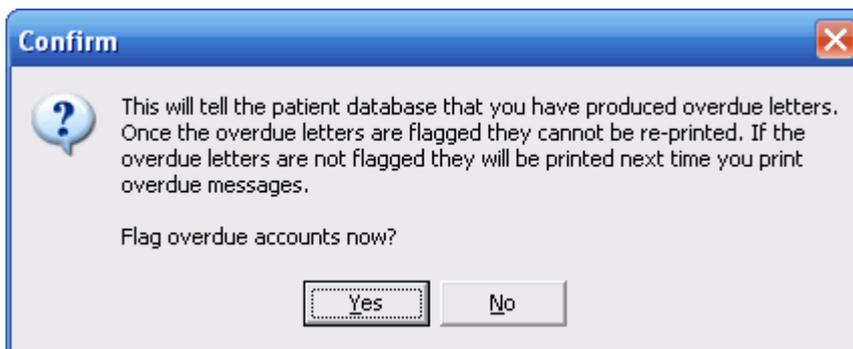
Recalls
Printing Recall Envelope Labels

To print envelope labels for your letters, click the [Recall Labels] button within the Recalls screen. You will need to specify exactly the same preferences used to create the recall letters.

Envelope labels are setup in Optomate for **Avery Label L7159** - 3 x 8 (24 labels per sheet).

Email Recalls

Optomate also provides the ability to do your recalls by email. This is the most cost effective method for businesses setup with an email program such as Microsoft Outlook.

Preparing Optomate for Email

1. Optomate 'System Settings' must have your email account settings defined before the email function will work. This is setup in *File ►System Settings ►Links – General*.
If this is not already setup, contact your IT personnel to provide you with your settings.

Sending Recall Emails

1. Click on the [Recall] button at the bottom of the main screen

2. Click on the [Send Recall Emails] button.

3. Select your preferences and click [Email].

4. A dialogue box will appear when done advising you how many emails were sent. To confirm an email was sent to a particular patient, go into the Patient file then click on the [Email] tab.

5. You can then Flag these Recalls as sent, as explained below.

Phone Recalls

You may prefer to do your recalls by telephone. If this is the case you will need to do the following:

1. Mark the patients recall type as a 'Phone' in the patient screen and save.

2. Print a 'Recall Listing' via the 'Recalls' screen.

◄**Only Include Phone Recalls.**

3. Use the list to contact your patients and tick them off as you go.

Flagging Patient Recalls

Flagging recalls tells the patient database they have successfully been completed. If the recalls are not flagged, they will be printed again next time you produce a recall run.

To begin, click on the [Flag Patient Recalls] button from the Recalls screen.
A new window will open where you should specify the same preferences used to create the recall letters. You must use the same date and options otherwise the patients that get flagged may not be the same patients that you actually ran your letters for.

If you don't want to flag all of the patients at once, you can do 'Individual Flagging'. This will bring up a list of patients currently due for a recall. You can tick off only the patients you wish to flag. This feature is particularly useful for phone recalls where you don't want to flag patients that you haven't been able to contact as yet.

When flagged, the 'Next Recall Due Date' will be automatically updated in the patient file by the 'Number of Months Apart' defined for that recall type.

* Warning - Flagging patient recalls can NOT be reversed. Once you have flagged the recalls, you will not be able to reprint the letters or labels and the patients will no longer appear on the 'Recall Listing'.

Activity: Demonstrate how to set a Patient Recall for yourself and print yourself a recall letter.