

## Using Zedmed for patient recall and reminders

### Preparing a patient list and saving to a Recall File

Recalling male patients aged 16 to 18 years:

1. Open your Zedmed software.
2. Go to the 'Management' tab.
3. Select 'Reports'.
4. Select 'Patients'.
5. Select 'Gender' as 'male'.
6. Change the status to 'Current'.
7. Enable the 'Age Range' and enter in the ages 16 to 18.
8. Screen or Print the report.

**Patient Reports**

**Style**

- ☒ Single Line Details
- ☐ Extended Details
  - ☐ Double Spacing
- ☐ Held Accounts
- ☐ Mailing Labels
- ☐ Bar
- ☐ Line
- ☐ Pie
- ☐ CSV file
- ☐ Mail merge using:

**Group By**  
None

**Order by**  
Family Name

**Criteria**

Branch: Zedmed

Usual Doctor: All

Referral Doctor: All

Patient: All

From Surname: To Surname:

Type: All Gender: All Status: Current

Family Head: ☐ Have Email Address: ☐

ATSI

- ☐ Aboriginal but not Torres Strait Islander origin
- ☐ Torres Strait Islander but not Aboriginal origin
- ☐ Both Aboriginal and Torres Strait Islander origin
- ☐ Neither Aboriginal nor Torres Strait Islander origin
- ☐ Declined to respond
- ☐ Unable to Answer
- ☐ Not Recorded

User Field: All Value:

Postcode Range: 0 To 0 Enabled: ☐

Medicare Expiry: 25/02/2013 To 25/02/2013 Enabled: ☐

First In Date: 25/02/2013 To 25/02/2013 Enabled: ☐

Last In Date: 25/02/2013 To 25/02/2013 Enabled: ☐

Age Range: 16 To 18 Enabled: ☒

DOB Range: 25/02/2013 To 25/02/2013 Enabled: ☐

Print Screen Close Help

Recalling male patients aged 16 to 26 years:

1. Open your Zedmed software.
2. Go to the 'Management' tab.
3. Select 'Reports'.
4. Select 'Patients'.
5. Select 'Gender' as 'male'.
6. Change the status to 'Current'.
7. Enable the 'Age Range' and enter in the ages 16 to 26.
8. Screen or Print the report.

**Patient Reports**

**Style**

☒ Single Line Details  
☐ Extended Details  
☐ Double Spacing  
☐ Held Accounts  
  
☐ Mailing Labels  
☐ Bar  
☐ Line  
☐ Pie  
☐ CSV file  
☐ Mail merge using:

**Group By**

**Order by**

**Criteria**

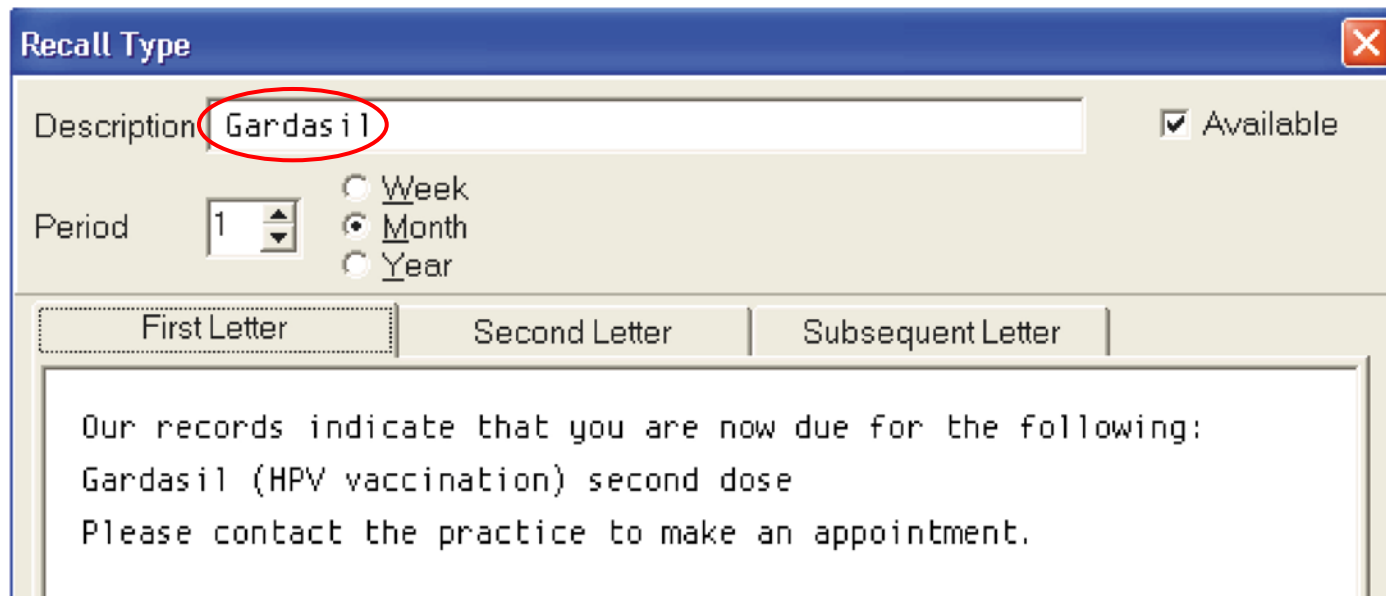
Branch  Usual Clinics ☐  
 Usual Doctor   
 Referral Doctor    
 Patient    
 From Surname  To Surname   
 Type  **Gender**  Status   
 Family Head ☐ Have Email Address ☐  
 ATSI ☐ Aboriginal but not Torres Strait Islander origin  
☐ Torres Strait Islander but not Aboriginal origin  
☐ Both Aboriginal and Torres Strait Islander origin  
☐ Neither Aboriginal nor Torres Strait Islander origin  
☐ Declined to respond  
☐ Unable to Answer  
☐ Not Recorded

User Field  Value

Postcode Range	<input type="text" value="0"/>	To	<input type="text" value="0"/>	Enabled	<input type="checkbox"/>
Medicare Expiry	<input type="text" value="25/02/2013"/>	To	<input type="text" value="25/02/2013"/>	Enabled	<input type="checkbox"/>
First In Date	<input type="text" value="25/02/2013"/>	To	<input type="text" value="25/02/2013"/>	Enabled	<input type="checkbox"/>
Last In Date	<input type="text" value="25/02/2013"/>	To	<input type="text" value="25/02/2013"/>	Enabled	<input type="checkbox"/>
Age Range	<input type="text" value="16"/>	To	<input type="text" value="26"/>	Enabled	<input checked="" type="checkbox"/>
DOB Range	<input type="text" value="25/02/2013"/>	To	<input type="text" value="25/02/2013"/>	Enabled	<input type="checkbox"/>

## Preparing recall letter and mail merge for patient recall letters and mailing labels

1. The first step is to create a 'Recall Type' and your recall letter. To create a new recall type, select the 'Management' tab, then 'Practice Setup', then 'Recall Types', and 'New'.
2. Enter in the description name and the time period of the new recall e.g. "Gardasil recall 2<sup>nd</sup> dose, 1 month."
3. Select First, Second or Subsequent Letter.
4. Fill in the text of the recall letter in free text area.
5. Click 'close' to save your recall letter.



6. The next step is to print your recall letters. Go to the 'Management' tab, 'WP Setup', 'FRM documents' and select the 'Mail Merge' tab.
7. When creating recall letters to be sent out, you will need to define the letter to be sent. Select 'Style', click the 'letter' button, then 'first' in the drop down menu.
8. Select 'FRM Recall Letter'.

Recall Report

**Style**

☒ Single Line Details  
☐ Extra Details  
☒ Letter First

Mail Merge Template First  
FRM Recall Letter Second  
FRM Recall Letter Subsequent

**Data**

Group Doctor  
Order Patient Name

**Criteria**

Maturity Date 12/04/2011 12/05/2011 ☒  
Creation Date 13/03/2011 12/04/2011 ☐  
Branch Albert Rd Medical Centre  
Treating Doctor <All>  
Patient   
Patient Status Not Deceased Letter Generated   
Activity Status Active

**Recall Type**

☒ All Recall Types  
☐ Fluvax  
☐ Health Assessment  
☐ Management Plan Review  
☐ Mental Health Review

Print Screen Deactivate these recalls Close Help

9. Enter the 'Maturity Date'.
10. Select 'Recall Type'.
11. Then 'Print'.

Recall Report

**Style**

☒ Single Line Details  
☐ Extra Details  
☒ Letter First

Mail Merge Template First  
FRM Recall Letter Second  
FRM Recall Letter Subsequent

**Data**

Group Doctor  
Order Patient Name

**Criteria**

Maturity Date 12/04/2011 12/05/2011 ☒  
Creation Date 13/03/2011 12/04/2011 ☐  
Branch Albert Rd Medical Centre  
Treating Doctor <All>  
Patient   
Patient Status Not Deceased Letter Generated   
Activity Status Active

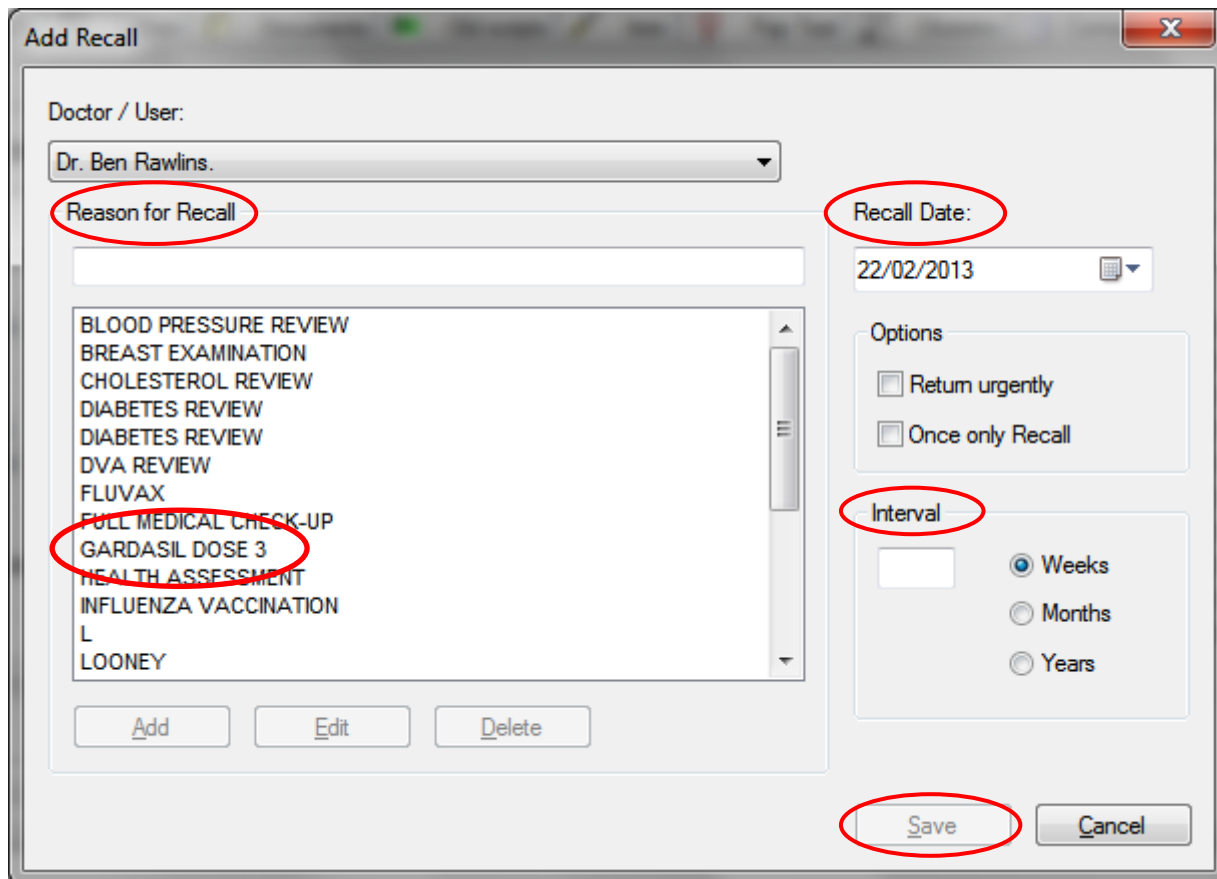
**Recall Type**

☒ All Recall Types  
☐ Fluvax  
☐ Health Assessment  
☐ Management Plan Review  
☐ Mental Health Review

Print Screen Deactivate these recalls Close Help

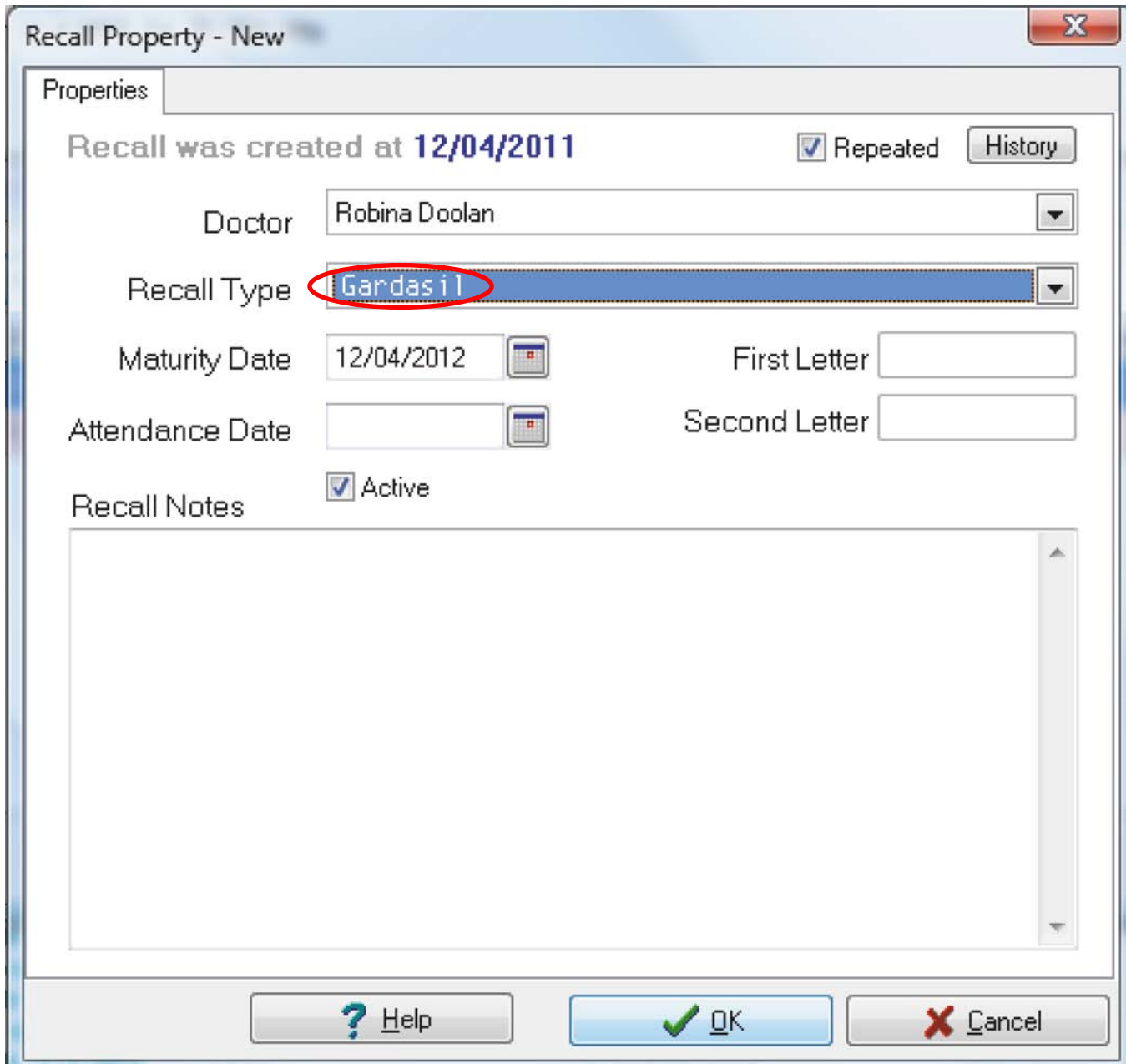
## Recording patient recall 'reason' and date sent in patient records

1. For each patient you will need to go to the clinical menu.
2. Open 'Recall/actions' in the drop down menu.
3. In the 'Add Recall' window enter the 'Reason for recall' or select a reason that is already in the scroll down menu.
4. Fill in the 'Recall Date' and the recall 'Interval' as required.
5. Once completed, select 'Save'.



## Adding a reminder for when the immunisation is due

1. When a patient attends for immunisation, enter the attendance date into the recall details. This will make the recall inactive.



Recall Property - New

Properties

Recall was created at 12/04/2011

☒ Repeated

Doctor: Robina Doolan

Recall Type: **Gardasil**

Maturity Date: 12/04/2012

First Letter:

Attendance Date:

Second Letter:

☒ Active

Recall Notes

? Help OK Cancel

2. When the patient attends for their immunisation, set up a new recall for when the next immunisation is due. For each patient you will need to go to the clinical menu, and open 'Recall/actions' in the drop down menu.
3. In the 'Add Recall' window enter the 'Reason for recall' or select a reason that is already in the scroll down menu.
4. Fill in the 'Recall Date' and the recall 'Interval' as required.
5. Once completed, select 'Save'.

This tips sheet is intended for use as a guide only, with the information based on the medical practice software version available as of July 2013. There may be other procedures and/or considerations relevant to this tips sheet that may not have been taken into account. Any use of this tips sheet from bioCSL is at the user's own risk and bioCSL Pty Ltd will not be responsible for any actions taken based on the use of this tips sheet. To the extent permitted by law, bioCSL Pty Ltd excludes all liability arising howsoever from the use of this tips sheet.