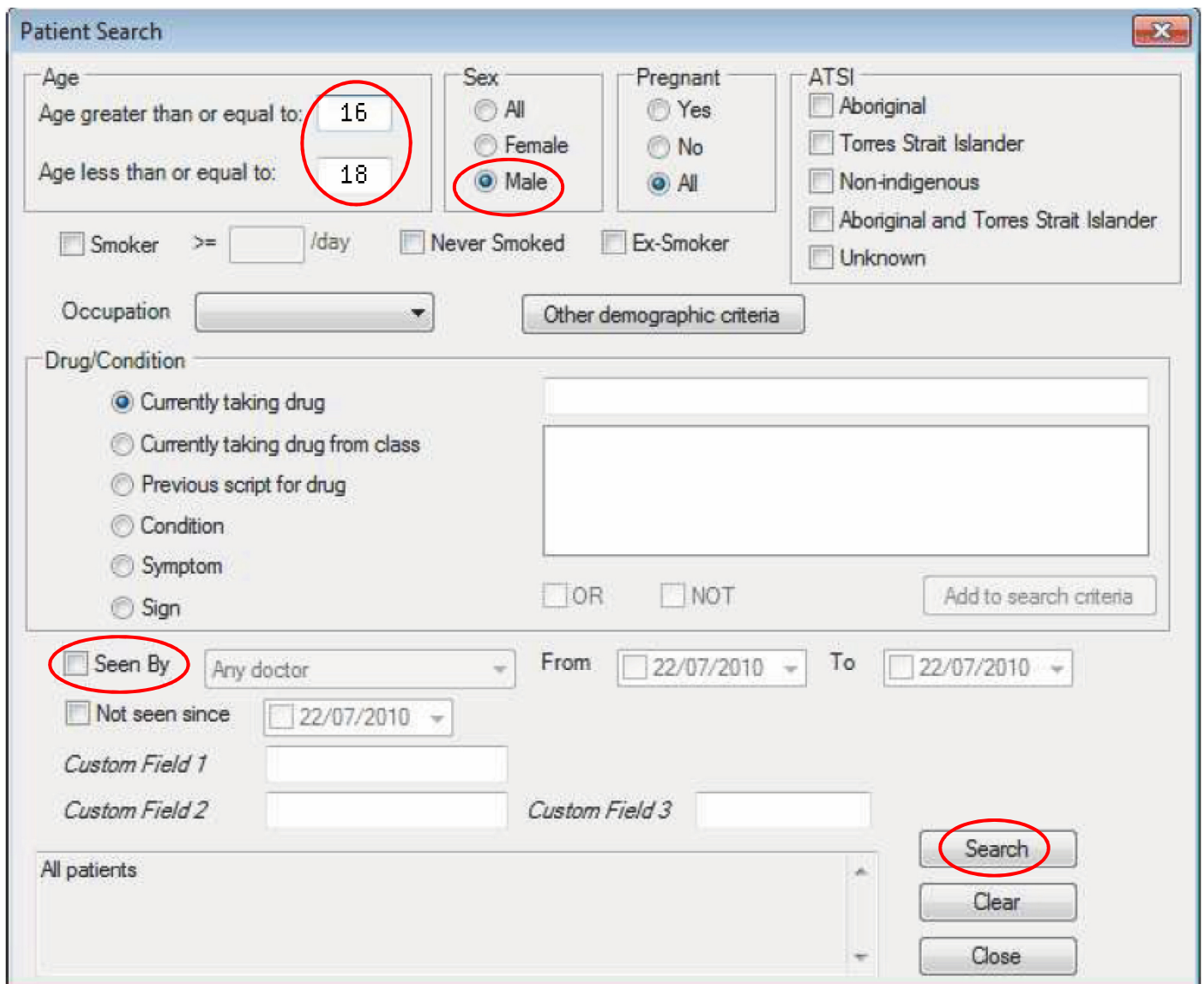![community Immunity - Immunisation resource]

Using Medical Director 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 Medical Director software.
2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
3. In the age window: 'Age greater than or equal to: type "16".
4. In the age window: 'Age less than or equal to: type "18".
5. Select 'Sex' as 'Male'.
6. Complete the 'Seen by' and the date section.
7. You can check your selected search criteria in the 'All patients' window at the bottom of the screen.
8. Click 'Search'.

Recalling male patients aged 16 to 26 years:

1. Open your Medical Director software.
2. From the clinical window, select 'Search' and then 'Patient'. The patient search window appears.
3. In the age window: 'Age greater than or equal to: type "16".
4. In the age window: 'Age less than or equal to: type "26".
5. Select 'Sex' as 'Male'.
6. Complete the 'Seen by' and the date section.
7. You can check your selected search criteria in the 'All patients' window at the bottom of the screen.
8. Click 'Search'.

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

Once the patient list is generated you can create a mail merge letter via the mail merge button on the patient list. Ensure you have a **template** available to act as the basis for the letters you intend to print in bulk.

1. Select the 'Mail merge' button at the bottom of the search window.
2. The 'Select Mail Merge Template' window appears.
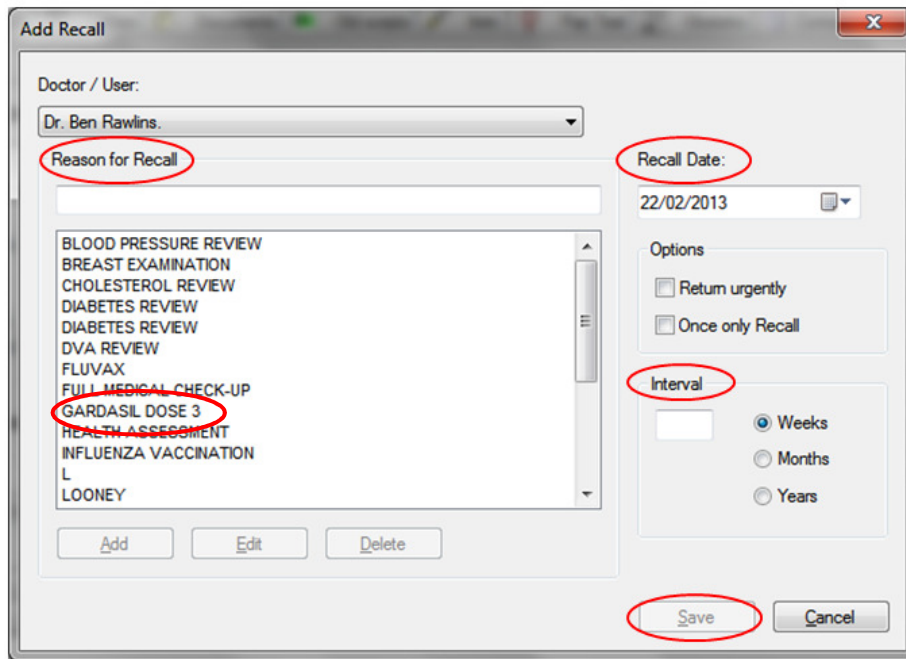3. Select a template from the 'User Defined' or 'Supplied' lists and click 'Open'.
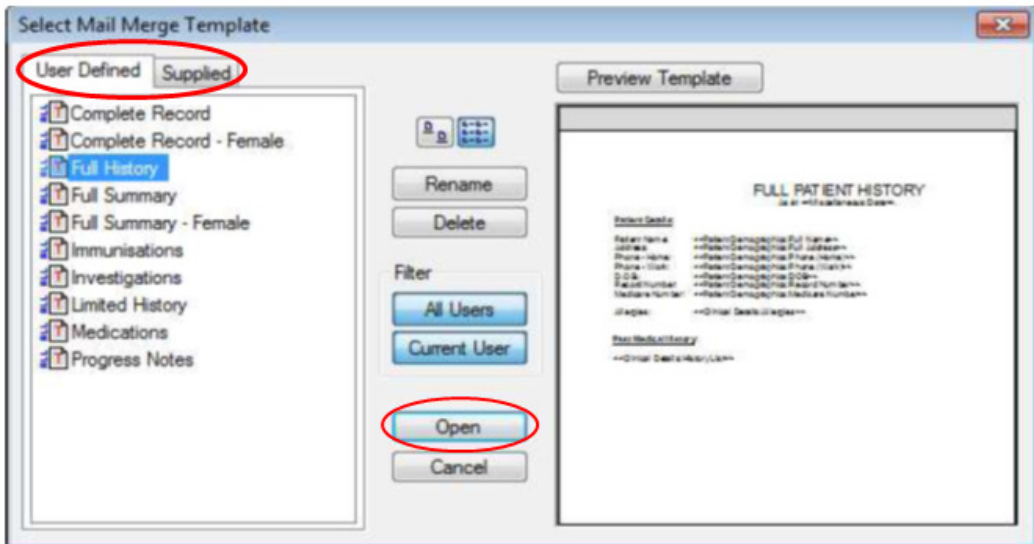
4. Medical Director begins to assemble your letters, merging the details of the patients you have selected into them. If the template you selected contains fields, you may be prompted for further information to be added to the letters.
5. The letters are automatically printed, using your current print options. A copy of the letter is added to each patient record and can be viewed using the Letters tab on the patient's clinical window.
6. (Optional) You may be prompted to enter a description for the mail merge. In the case of a failed print run, this description can be used in conjunction with the Mail Merge Utility to help you identify which mail merge print runs need to be resumed. The Mail Merge Utility is part of the HCN Maintenance suite. For the Mail Merge Description box to appear you must enable it via 'Mail Merge Print Options'.
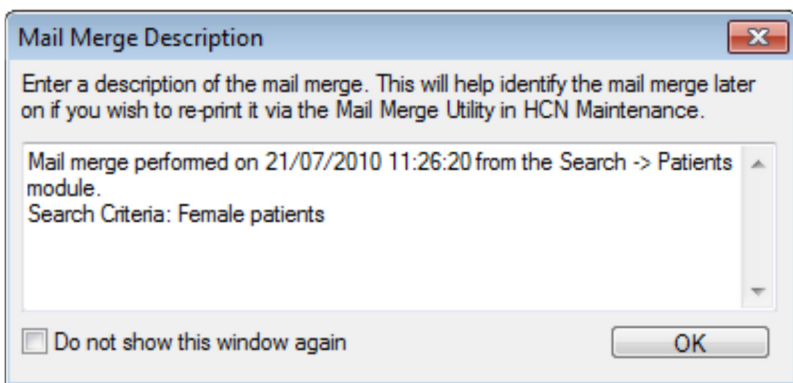
Recording patient recall 'reason' and date sent in patient records

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 next immunisation is due

When a patient attends for immunisation, mark the recall as complete and enter a new reminder for when the patient next requires immunising as above. This will enable an easy recall for the following year.