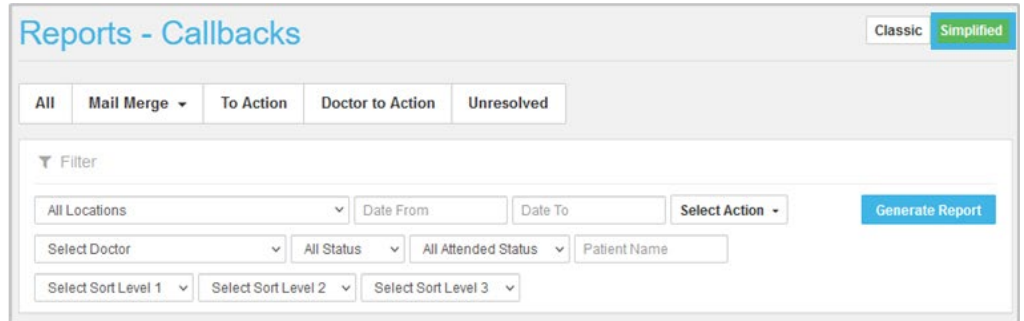
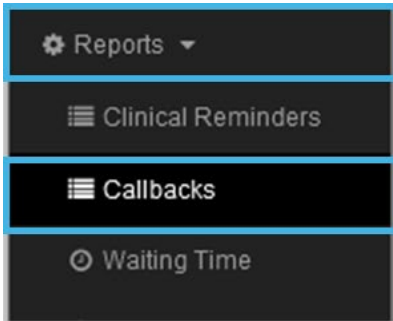


# Callbacks Simplified Reports Guide

This guide will take you through how to use the **Simplified Report** for results.

The **Simplified Report** shows the same data as in our **Classic Report**, with added views to help you action and follow up patients who have had a result or correspondence return.

Find the **Simplified Report**, in your Dashboard. **Go to Reports > Select Callbacks > Click Simplified**



To change back to **Classic Reports**, Click **Classic**.



## Reports

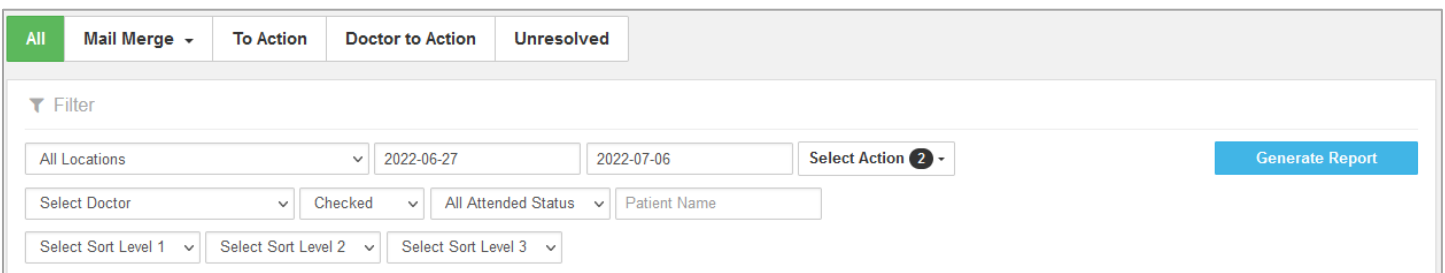
There are five reports you can run in the **Simplified Report**:

1. **All**: View everything in your report
2. **Mail Merge**: View all patients in mail merge
3. **To Action**: View all patients who have an upcoming appointment which is not relating to discussing their results
4. **Doctor To Action**: View patients who have attended an appointment, but their results have not been marked as "Given to Patient" in BP or "Notified" in MD, by the Doctor.
5. **Unresolved**: View patients who have not booked an appointment since their results were checked and the follow up timeframe has finished

## Filters

There are a range of filters to choose for the report. Listed below are the **recommended filters** to include each time the report is run:

- **Date From**: You can run the report for up to 90 days at a time
- **Date To**: Recommend to set to today's date
- **Select Action**: Choose one or multiple Results actions
- **Status**: Select Checked, this will show Results given an action by the Doctor

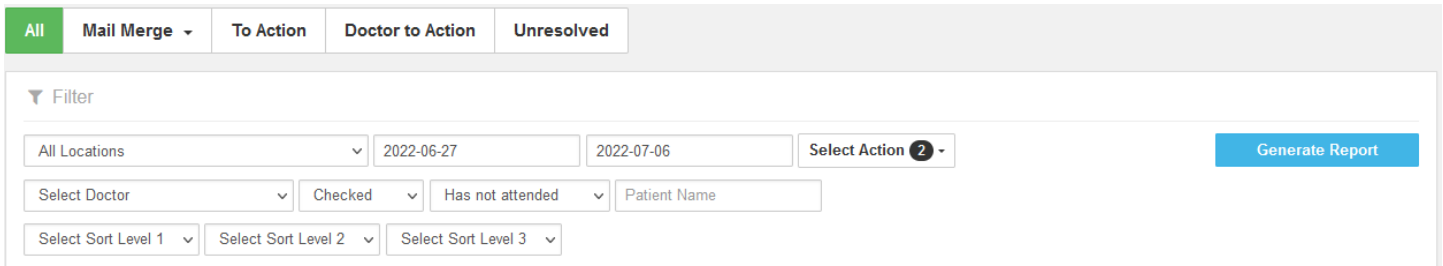


## Other Filters

Listed below are what the other filters will show in the report:

- **All Locations:** View all locations or select a specific location in the report
- **Select Doctor:** View all Doctors or select a specific Doctor in the report
- **Attended Status:** View patients who have or have not attended an appointment since their result was checked

**Note:** Sort Level 1, 2 and 3 will sort the order information is displayed in your report according to what you choose



The screenshot shows a filter interface with the following elements:

- Buttons: All, Mail Merge (dropdown), To Action, Doctor to Action, Unresolved
- Filter section:
  - Dropdown: All Locations
  - Date range: 2022-06-27 to 2022-07-06
  - Action: Select Action (2)
  - Generate Report button
  - Dropdown: Select Doctor
  - Dropdown: Checked
  - Dropdown: Has not attended
  - Text input: Patient Name
  - Dropdown: Select Sort Level 1
  - Dropdown: Select Sort Level 2
  - Dropdown: Select Sort Level 3

## Bulk Actions

The Simplified Report has **Bulk Actions** which lets you do the following actions for your patients:

**Approve & Generate Mail:** Generate and download letters to post to your patients. **(only in Mail Merge report)**

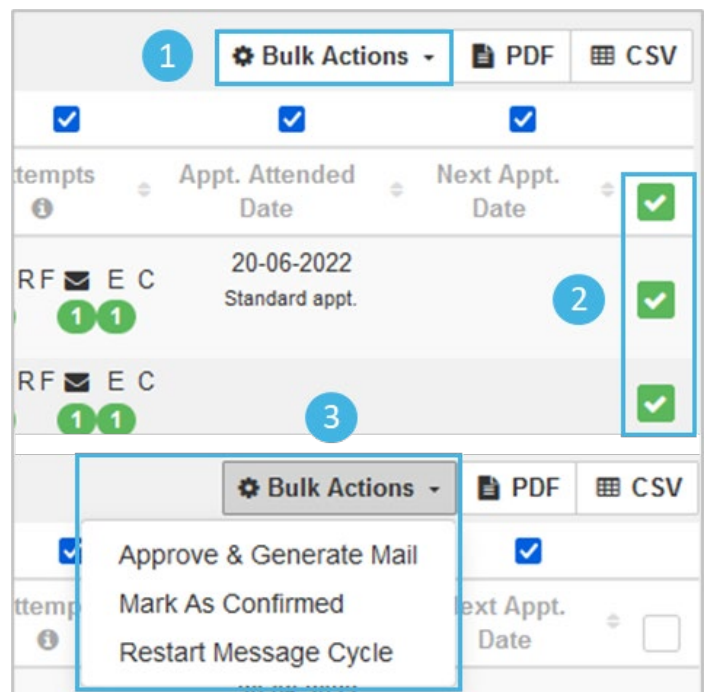
**Mark as Confirmed:** Mark results as Confirmed – this terminates the message cycle.

**Restart Message Cycle:** Restart the 2<sup>nd</sup> SMS and Mail Merge Process for patients.

The **Restart Message Cycle** will restart the message process from the **2<sup>nd</sup> SMS message**, and will be sent to the patient the next day. The mail merge will be created according to your Clinic's timeframe.

## How to use Bulk Actions

1. **Bulk tick** or **individually tick** the required patients
2. Click **Bulk Actions**
3. Select the required **Bulk Action**



The screenshot illustrates the Bulk Actions process in a patient report table. The table has columns for 'tempts', 'Appt. Attended Date', and 'Next Appt. Date'. Three rows are visible, each with a checked box in the 'Next Appt. Date' column. A 'Bulk Actions' dropdown menu is open, showing three options: 'Approve & Generate Mail', 'Mark As Confirmed', and 'Restart Message Cycle'. The menu is highlighted with a blue box, and the 'Bulk Actions' button in the table header is also highlighted with a blue box and a circled '1'. The 'Next Appt. Date' column header is circled with a '2', and the 'Bulk Actions' dropdown is circled with a '3'.

## Reports - All

**Use this Report:** To view everything in your report

**Bulk Actions in this Report:** Mark as Confirmed and Restart Message Cycle.

**How can this Report be used:** Run this report if you would like an overview of what is happening with your results.

All
Mail Merge ▾
To Action
Doctor to Action
Unresolved

Filter

Search

	Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Non-urgent appt		CHECKED 28-06-2022	28-06-2022		RF E C 2 1	24-06-2022 Standard appt.	16-08-2022 <a href="#">Recall</a>
			Non-urgent appt		CHECKED 27-06-2022	27-06-2022		RF E C 1 1	24-06-2022 Standard appt.	12-08-2022 <a href="#">Care Plan - Doctor</a>
			Non-urgent appt		CHECKED 29-06-2022	29-06-2022		RF E C 2		10-08-2022 <a href="#">Standard appt.</a>
			Non-urgent appt		CHECKED 30-06-2022	30-06-2022		RF E C 2	20-06-2022 Standard appt.	09-08-2022 <a href="#">Recall</a>
			Non-urgent appt		CHECKED 30-06-2022	30-06-2022		RF E C 2		04-08-2022 <a href="#">Recall</a>

## Know your icons

Listed below are the common icons you'll see in the report

	Patient has been sent one SMS message		Mail merge generated
	Patient has been sent two SMS messages		Result has been exported a letter
	Patient has no mobile, mail merge generated		Result has been marked as confirmed
	Upcoming appointment type booked. <b>Note:</b> The report also displays the Doctor's name		
	Results with this icon has been marked as abnormal by the Doctor		
	Click the cog icon, to view patient info, appointments, leave notes, send SMS messages and mark confirm		

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## Report - Mail Merge

**Use this Report:** To view all patients in mail merge.

**Bulk Actions in this Report:** Approve and Generate Mail, Mark as Confirmed and Restart Message Cycle.

**How can this Report be used:** To export letters to patients, mark patients as confirmed and view patients who have been previously exported a letter, or who have been marked as confirmed.

### What the filters show:

**All:** Everything in mail merge

**To Post:** Patients who have not been exported a letter or not marked as confirmed

**Exported:** Mail Merge Letters previously exported to patients,

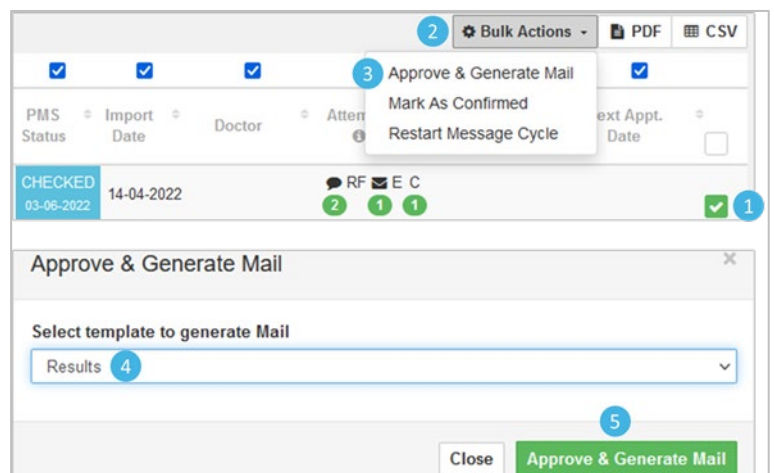
**Confirmed:** Results previously marked as confirmed

All <b>Mail Merge</b> To Action Doctor to Action Unresolved										
Filter										
All Locations		2022-06-27		2022-07-06		Select Action 2		Generate Report		
Select Doctor		Checked		All Attended Status		Patient Name				
Select Sort Level 1		Select Sort Level 2		Select Sort Level 3						
Search <span style="float: right;">Bulk Actions PDF CSV</span>										
Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date	
			Non-urgent appt	CHECKED 28-06-2022	25-05-2022		RF E C 2 1			
			Non-urgent appt	CHECKED 27-06-2022	30-05-2022		RF E C 2 1	14-06-2022 Standard appt.	31-07-2022 Recall	

## Mail Merge – Generate and Export Letter

To generate and export a letter for a patient:

1. Bulk select or individually select the required patients
2. Click **Bulk Action**
3. Click **Approve and Generate Mail**
4. Choose the **letter**
5. Click **Approve and Generate Mail**



The screenshot shows the 'Bulk Actions' menu with options: Approve & Generate Mail, Mark As Confirmed, and Restart Message Cycle. The 'Approve & Generate Mail' dialog box is open, showing a dropdown menu for 'Results' and an 'Approve & Generate Mail' button.

## Report - To Action

**Use this Report:** To view all patients who have an upcoming appointment which is not relating to discussing their results.

**Bulk Actions in this Report:** Mark as Confirmed and Restart Message Cycle.

**How can this Report be used:** To update the patient's appointment to the correct one, or use **Bulk Actions** to either mark a result as confirmed or restart the message cycle.

**Note:** This report will show appointments which do not include Result or Recall in the Appointment name. Once the appointment is change to a Result or Recall appointment, it will no longer appear in the **To Action Report**

<span>All</span> <span>Mail Merge</span> <span>To Action</span> <span>Doctor to Action</span> <span>Unresolved</span>										
Filter										
All Locations		2022-06-27		2022-07-06		Select Action 2		Generate Report		
Select Doctor		Checked		All Attended Status		Patient Name				
Select Sort Level 1		Select Sort Level 2		Select Sort Level 3						
Search										Bulk Actions PDF CSV
Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date	
			Non-urgent appt	CHECKED 01-07-2022	07-06-2022		R F E C 2		06-07-2022 MHCP	<input type="checkbox"/>
		GP PLUS MARION	Non-urgent appt	CHECKED 04-07-2022	22-06-2022		R F E C 1	28-06-2022 Standard appt.	19-07-2022 Standard appt.	<input type="checkbox"/>

## To Action - Change Appointment

To change the Appointment type:

1. Click on the appointment
2. Select the **appointment type**
3. Click **Confirm**

To change multiple appointments, update all appointments and then click **Confirm**.

**Remember:** Once the appointment is change to a Result or Recall appointment, it will no longer appear in the **To Action Report**.

**Note:** The Appointment type is only updated in the report after you click **Generate Report**. You can change as many appointment types as needed and click the **Generate Report** button once done.

Attempts	Appt. Attended Date	Next Appt. Date
R F E C 2		06-07-2022 MHCP Dr Mehedi Hossain

### Change Appointment Type

Change Appointment Type to 2

Select Appointment Type

Close Confirm

3 Generate Report

Bulk Actions
PDF
CSV

## Report - Doctor to Action

**Use this Report:** To view patients who have attended an appointment, but their results have not been marked as “Given to Patient” in BP or “Notified” in MD, by the Doctor.

**Bulk Actions in this Report:** Mark as Confirmed and Restart Message Cycle.

**How can this Report be used:** Run this report to provide a list for your Doctors that they can update in the Practice Management Systems. This report can be run for individual Doctors and exported to a PDF.

All	Mail Merge	To Action	Doctor to Action	Unresolved					
Filter All Locations: [v] 2022-06-27 [v] 2022-07-06 [v] Select Action [2] - [v] <span>Generate Report</span>									
Select Doctor [v] Checked [v] All Attended Status [v] Patient Name [v]									
Select Sort Level 1 [v] Select Sort Level 2 [v] Select Sort Level 3 [v]									
Search [v] <span>Bulk Actions</span> <span>PDF</span> <span>CSV</span>									
Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
			Non-urgent appt	CHECKED 29-06-2022	21-06-2022		RF E C 1 1	04-07-2022 Long appt.	<input type="checkbox"/>
			Non-urgent appt	CHECKED 28-06-2022	22-06-2022		RF E C 1 1	29-06-2022 Telephone consult	20-07-2022 <a href="#">Recall</a> <input type="checkbox"/>

## Report - Unresolved

**Use this Report:** To view patients who have not booked an appointment since their results were checked and the follow up timeframe has finished.

**Bulk Actions in this Report:** Mark as Confirmed and Restart Message Cycle.

**How can this Report be used:** Follow up patients according to your Clinic’s processes, or use **Bulk Actions** to either mark a result as confirmed or restart the message cycle.

All	Mail Merge	To Action	Doctor to Action	Unresolved					
Filter All Locations: [v] 2022-06-27 [v] 2022-07-06 [v] Select Action [2] - [v] <span>Generate Report</span>									
Select Doctor [v] Checked [v] All Attended Status [v] Patient Name [v]									
Select Sort Level 1 [v] Select Sort Level 2 [v] Select Sort Level 3 [v]									
Search [v] <span>Bulk Actions</span> <span>PDF</span> <span>CSV</span>									
Patient	Mobile	Description	Action	PMS Status	Import Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
			Non-urgent appt	CHECKED 28-06-2022	25-05-2022		RF E C 2 1		<input type="checkbox"/>
			Non-urgent appt	CHECKED 28-06-2022	02-06-2022		RF E C 2 1		<input type="checkbox"/>