

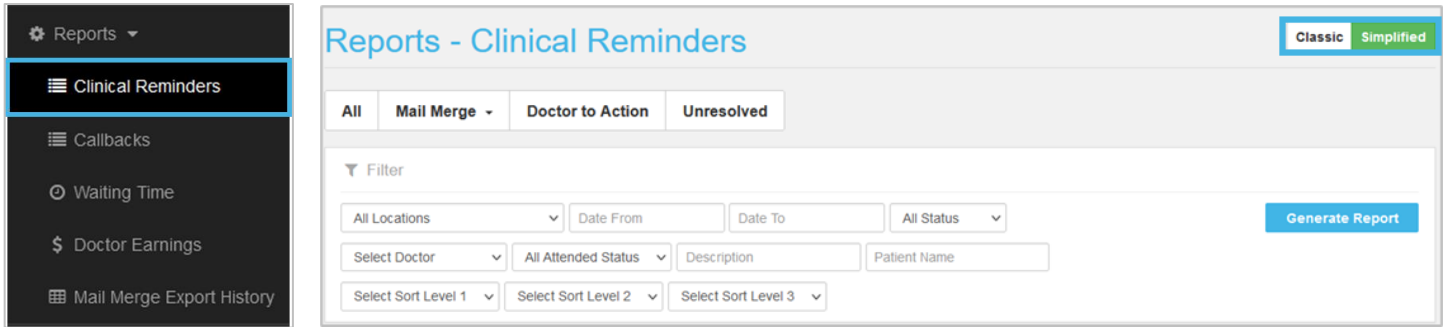
Clinical Reminders Simplified Reports Guide

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

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 a Clinical Reminder due.

Find the **Simplified Report**, in your Dashboard:

Go to Reports > Select Clinical Reminders > Click Simplified Classic Simplified



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

Reports

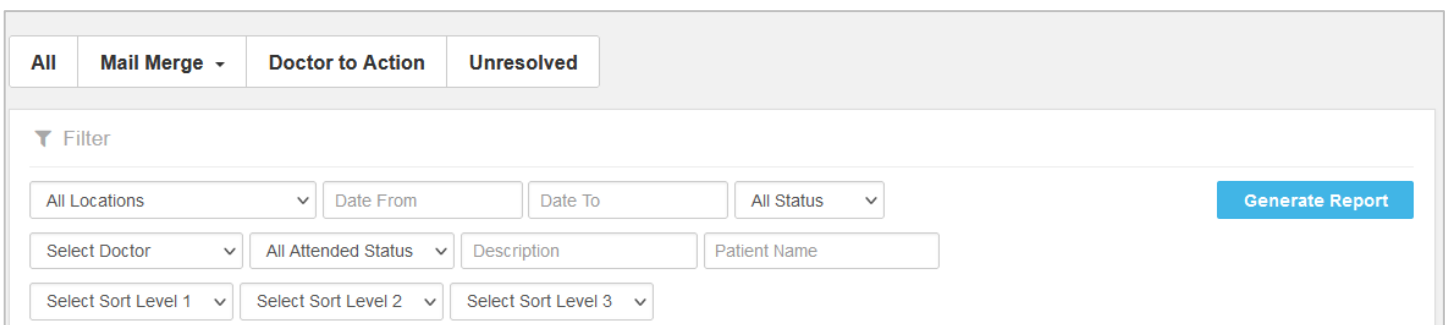
There are four reports you can run in the **Simplified Report**:

1. **All**: View everything in your report
2. **Mail Merge**: View all patients in mail merge
3. **Doctor To Action**: View patients who have attended an appointment, but their Clinical Reminder have not been marked as completed in BP or MD, by the Doctor.
4. **Unresolved**: View patients who have not booked an appointment since their Clinical Reminder was due 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
- **Status**: Select Contacted, this will show Patients who have been sent an SMS message

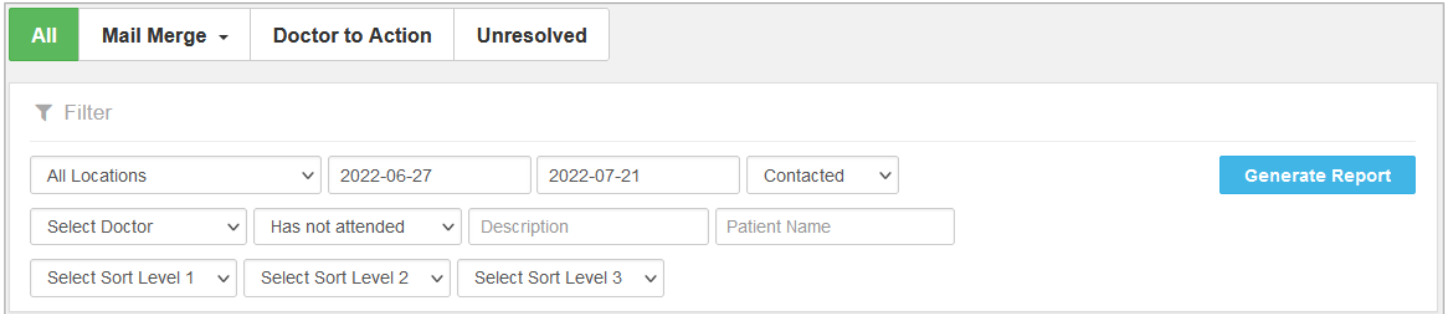


Other Filters

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 Clinical Reminder was due

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



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)**

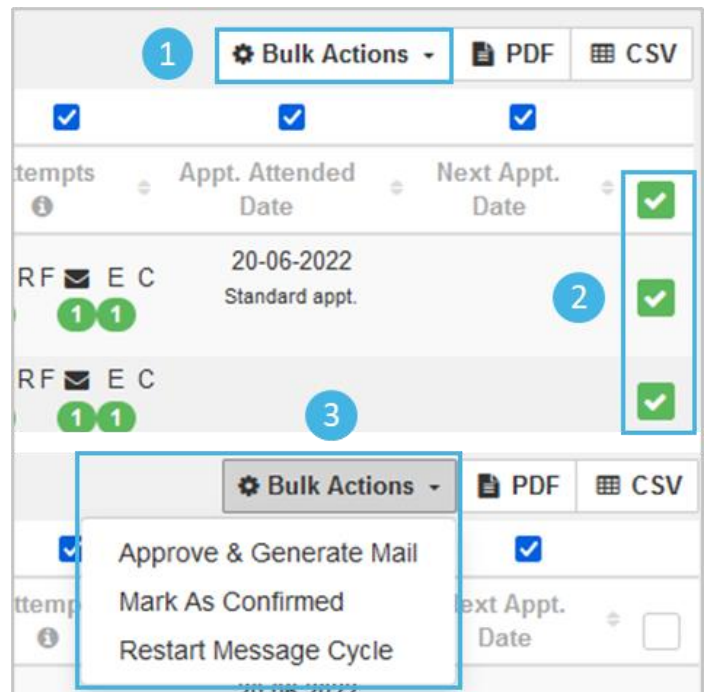
Mark as Confirmed: Mark results as Confirmed – this terminates the message cycle.

Restart Message Cycle: Restart the 2nd SMS and Mail Merge Process for patients.

The **Restart Message Cycle** will restart the message process from the **2nd 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**



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 Clinical Reminders.

All Mail Merge Doctor to Action Unresolved									
Filter									
All Locations		2022-07-11	2022-07-21	Contacted		Generate Report			
Select Doctor	Has not attended	Description	Patient Name						
Select Sort Level 1	Select Sort Level 2	Select Sort Level 3							
<input type="text" value="Search"/> Bulk Actions PDF CSV									
Patient	Mobile	Description	PMS Status	Due Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date	
	<input checked="" type="checkbox"/>	Prolia due	CONTACTED	20-07-2022		1	18-07-2022 Care Plan Review - Doctor	11-08-2022 Standard appt.	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Care Plan - New	CONTACTED	20-07-2022		1	07-07-2022 Immunisation	09-08-2022 Health Assessment	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Care Plan Review	CONTACTED	17-07-2022		1		08-08-2022 Care Plan Review - Doctor	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Care Plan Review	CONTACTED	17-07-2022		1		08-08-2022 Care Plan Review - Doctor	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	Care Plan Review	CONTACTED	14-07-2022		2		05-08-2022 Care Plan Review - Doctor	<input type="checkbox"/>

Know your icons

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

1	Patient has been sent one SMS message	2 1	Mail merge generated
2	Patient has been sent two SMS messages	2 1 1	Clinical Reminder has been exported a letter
1	Patient has no mobile, mail merge generated	2 1 1	Clinical Reminder has been marked as confirmed
28-06-2022 Standard appt.	Upcoming appointment type booked. Note: The report also displays the Doctor's name		
	Click the cog icon, to view patient info, appointments, leave notes, send SMS messages and mark confirm		
	Clinical Reminders with this icon has been marked as Clinically Significant in the Practice Management Systems		

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,

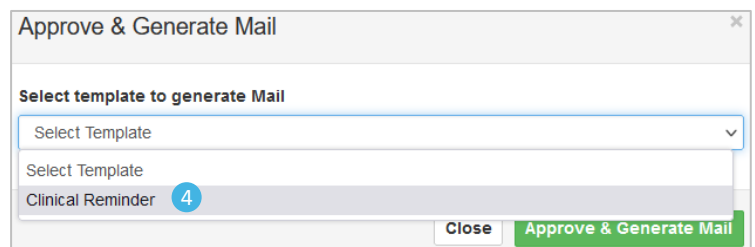
Confirmed: Clinical Reminders previously marked as confirmed

All Mail Merge Doctor to Action Unresolved									
Filter									
All Locations		2022-07-11	2022-07-21	Contacted		Generate Report			
Select Doctor	Has not attended	Description		Patient Name					
Select Sort Level 1	Select Sort Level 2	Select Sort Level 3							
Search									
Bulk Actions PDF CSV									
Patient	Mobile	Description	PMS Status	Due Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date	
		Depo contraception	CONTACTED	14-07-2022		2 R F E C			
		Imaging test due	CONTACTED	13-07-2022		2 R F E C		21-07-2022 Standard appt.	
		Health assessment - 75 + in clinic	CONTACTED	15-07-2022		1 R F E C			
		Mammogram	CONTACTED	13-07-2022		2 R F E C			
		Depo contraception	CONTACTED	12-07-2022		2 R F E C	11-07-2022 Immunisation		
		Blood Test	CONTACTED	13-07-2022		2 R F E C			

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**

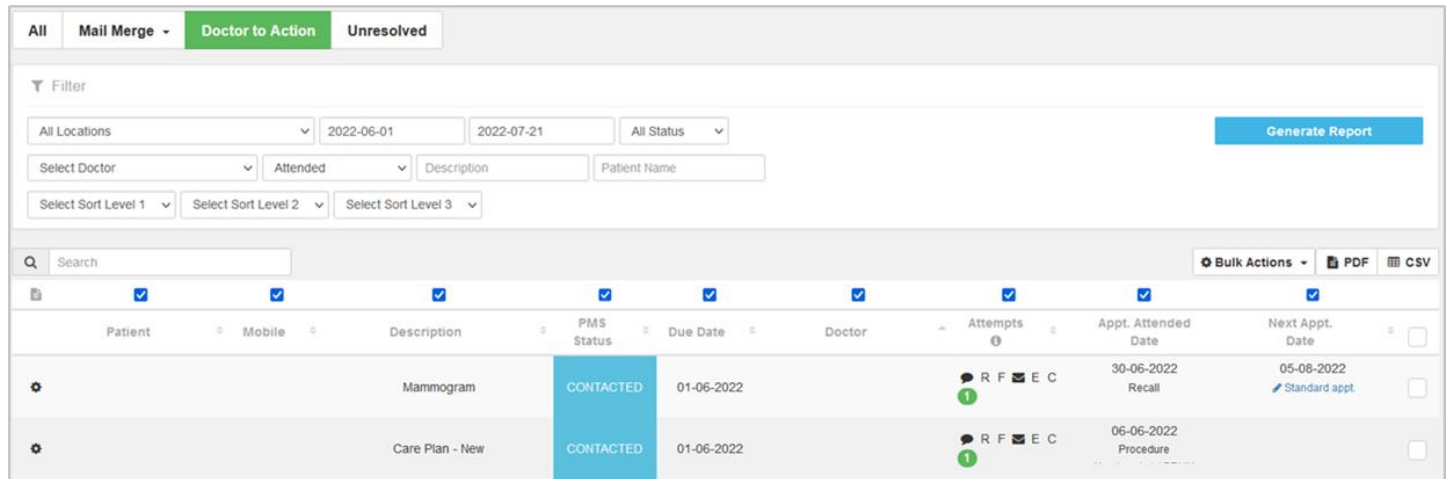


Report - Doctor to Action

Use this Report: To view patients who have attended an appointment, but their Clinical Reminder has not been completed in BP or 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.



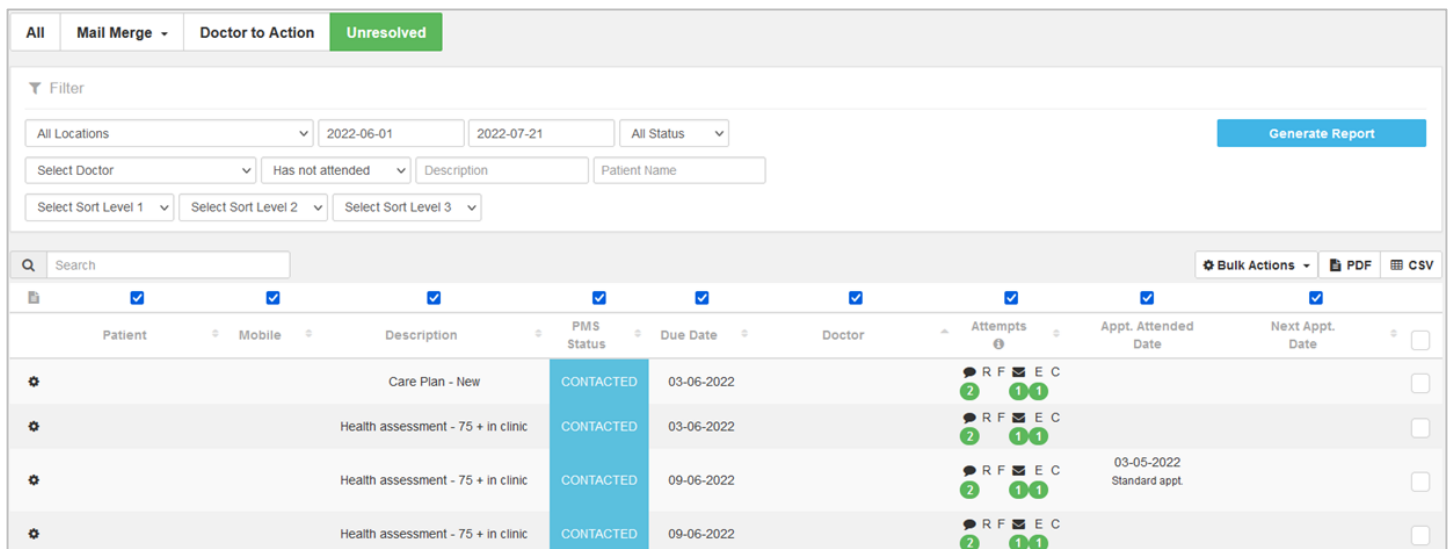
Patient	Mobile	Description	PMS Status	Due Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
		Mammogram	CONTACTED	01-06-2022		R F E C 1	30-06-2022 Recall	05-08-2022 Standard appt
		Care Plan - New	CONTACTED	01-06-2022		R F E C 1	06-06-2022 Procedure	

Report - Unresolved

Use this Report: To view patients who have not booked an appointment since their Clinical Reminder was due 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.



Patient	Mobile	Description	PMS Status	Due Date	Doctor	Attempts	Appt. Attended Date	Next Appt. Date
		Care Plan - New	CONTACTED	03-06-2022		R F E C 2 1 1		
		Health assessment - 75 + in clinic	CONTACTED	03-06-2022		R F E C 2 1 1		
		Health assessment - 75 + in clinic	CONTACTED	09-06-2022		R F E C 2 1 1	03-05-2022 Standard appt	
		Health assessment - 75 + in clinic	CONTACTED	09-06-2022		R F E C 2 1 1		