



Monash Division

MD MEDICAL DIRECTOR

Recalls, Reminders

&

Searching Databases

Monash Division of General Practice – March 2006

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Introduction

The difference between Recalls and Reminders

Medical Director uses the term recall to cover both recalls and reminders. It is important to define the difference between a recall and a reminder.

Recalls

A recall occurs when it is crucial for a patient to attend the practice, usually in the instance of an abnormal result. Recalls are:

- Urgent
- Usually involve test results
- There are medico-legal issues involved
- Doctor has “duty of care”

Reminders

A reminder is an offer to provide patients with systematic preventative care, usually for Pap smears, diabetes and immunisations. Reminders are:

- Non-urgent
- Important
- Usually involve chronic disease management, immunisations, etc
- Patient has “duty of care”

Why use recalls and reminders

Recall system:

A good recall system is necessary as it prevents patients “falling through the cracks” when there are urgent medical problems that need to be followed up. It helps protect the practice from medico-legal complaints, and provides optimal patient care.

Reminder system:

Implementing reminder system in the practice is essential for continuing and preventative care. Reminder systems:

- Provide a systematic approach to preventative care
- Improve patient relationship with the practice
- Reinforce patient loyalty
- Help compliance with the scheduled events needed to claim PIP payments
- Encourage consistent patient care and reduces the need for opportunistic care
- Can increase practice income both from regular visits and PIP payments

It is recommended that the practice adopt a team based approach when coordinating the recall and reminder system, which includes defining the role of the GP and staff to ensure that the system is effective, fail safe and sustainable.

When using electronic recall and reminder systems it is important to acknowledge that the data is only as good as what is entered. This reinforces the need to have adequate systems, policies and procedures in place.

Standards

Recall System (Criterion 1.5.4)

A recall of the patient is implemented when follow up is determined as being clinically significant that the probability of harm will occur if adequate follow up does not occur.

On the receipt of an abnormal test result or as directed by the GP, patients will be contacted by the practice requesting the patient to attend for a follow-up appointment. The GP will inform the patient of the result during the appointment and any subsequent consultation or other action required. All attempts will be made to contact the patient so that an appointment can be made to discuss the results.

Other items that may form part of the recall system include clinically significant requests for tests or referrals.

As a minimum, the practice needs to attempt to contact the patient via the following methods:

- 3 phone calls at different times of the day.
- If the patient has not responded, then a letter will be sent via registered post asking the patient to contact the practice.
- If the patient has not responded to all communication attempts, the GP is notified and it is strongly recommended that the GP contact their medical defence organisation for their advice and this should be documented in the patient health record.
- All attempts to contact the patient must be documented in the patient's health record.
- **IMPORTANT:** Do not remove the recall flag until the patient has **ATTENDED** their appointment or if the GP has instructed you to do so.

Reminder System (Criterion 1.3.1)

Practices need to have a systematic process in place for providing patients with preventative care. Reminders may be conducted for various conditions and reasons such as immunisations, diabetic care and pap smears.

Reminders can take in place in a number of ways including:

- Flagging of patient health records for opportunistic preventive activities.
- Paper or electronic system showing due dates for preventive activities.
- Paper or electronic reminder system.
- National and State or Territory based reminder registers.
- Consent must be obtained from patients prior to placing them on a proactive reminder system, and this includes National and State or Territory based reminder registers.
- All attempts to contact the patient must be documented in the patient's health record.

Systems for reminders

- On a monthly basis, generate the reminder letter to the patient. Document in the patient's health record the date that the first letter was forwarded to the patient.
- IMPORTANT NOTE: it is essential that before contacting the patient, cross-references are made to ensure that they have not already received the information
- If the patient does not contact the practice after the first letter, send a second letter the next month. Document in the patient's health record the date that the second letter was forwarded to the patient.
- If the patient does not contact the practice after the second letter, phone the patient. Document in the patient's health record all attempts to phone them and (if applicable) the times of the day called.
- IMPORTANT: Do not remove the reminder flag until the patient has ATTENDED their appointment or if the GP has instructed you to do so.
- If the patient does not attend, advise the GP and repeat the above procedures.
- Once the patient has their appointment, remove the reminder flag.

Managing Patient Recalls

Investigations

Most pathology companies provide electronic downloads for pathology results. These should be downloaded on a regular basis into a holding file where they can be viewed by the appropriate doctor and assigned to a patient record.

The doctor will assign an action to the record, either “To return urgently”, To be discussed” or “No action”. It is also possible to add a recall at this stage.

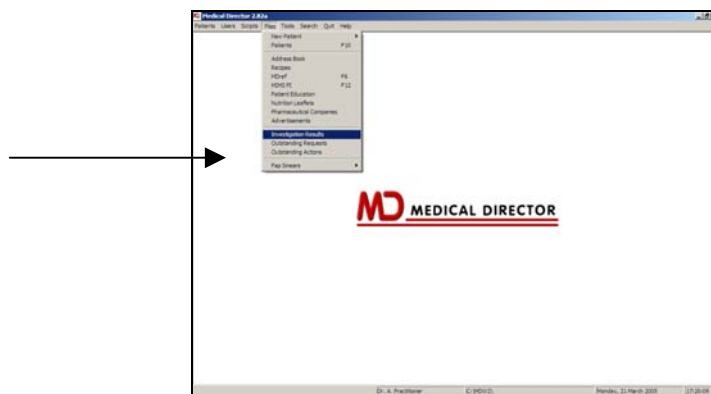
Lists of patients under these headings can be printed for each doctor, and the information added to the Outstanding Actions list so the doctor is reminded when the patient record is opened.

While Medical Director provides tools for managing recalls, they are rather cumbersome and many practices choose to use a manual system.

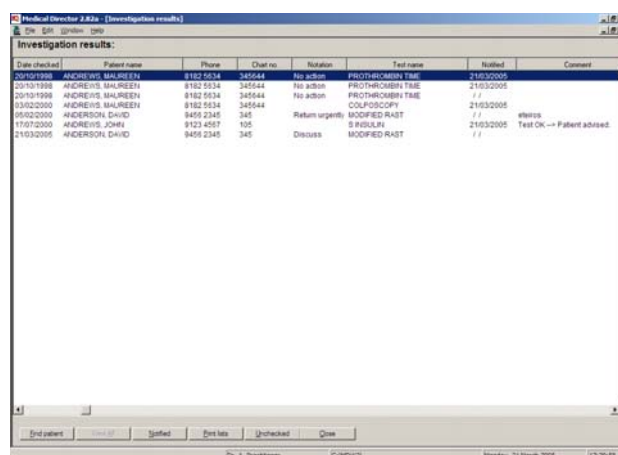
Investigation Results List

Once the results have been checked by the doctor and marked with the appropriate action, lists of each category can be printed for review.

To print the lists of investigation results, with no patient records open go to **Files > Investigation Results**.



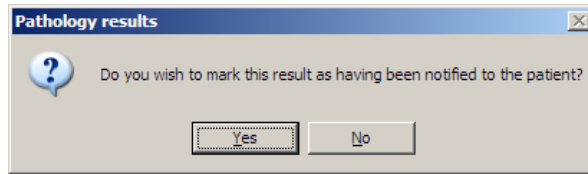
A list of all the investigations will appear. For most practices this will be a very long list, ordered by the date the results were checked.



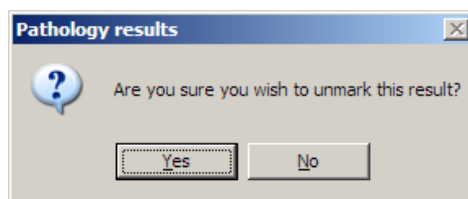
Date checked	Patient name	Phone	Chat no.	Notation	Test name	Result	Comment
20/02/2005	ANDREWS MAUREEN	0182 6534	345644	No action	PROTHROMBIN TIME	21032005	
20/02/2005	ANDREWS MAUREEN	0182 6534	345644	No action	PROTHROMBIN TIME	/ /	
20/02/2005	ANDREWS MAUREEN	0182 6534	345644		COLPOSCOPY	21032005	
05/02/2005	ANDERSON DAVID	0455 2345	345	Return urgently	MODIFIED RAFT	/ /	W/MS
17/07/2005	ANDREWS JOHN	0123 4567	105		S INSULIN	21032005	Test OK -> Patient absent.
21/03/2005	ANDERSON DAVID	0455 2345	345	Discuss	MODIFIED RAFT	/ /	

Using the **Find Patient** button, a patient name can be selected and the results for that patient only will appear. Selecting the **View All** button will return the full list to the screen.

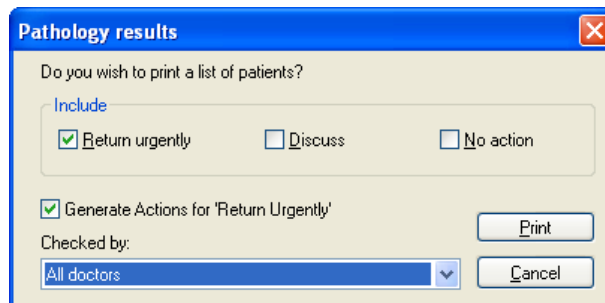
Highlighting a line and pressing the **Notified** button will allow a result to be marked as notified.



If the result is already marked as notified, the notification can be removed by highlighting the record and pressing the **Notified** button.

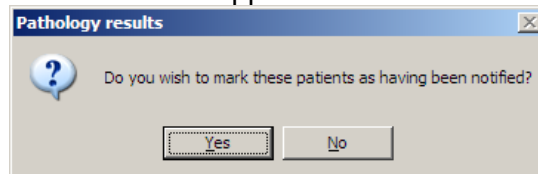


To print the lists, press the **Print lists** button, and choose which category you wish to print.



The list will print, and you will be asked if you wish to mark the results as having been notified. **Only results that have not been marked as notified** will be printed.

There is a check box to choose whether you want an action notifying the doctor that the patient has results to be discussed to appear on the outstanding actions list.



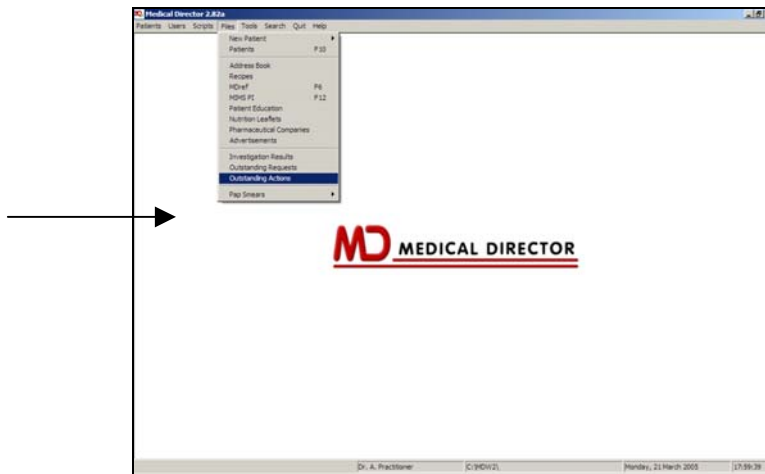
Whether you mark the results as notified at this stage depends on your practice procedures. The results can also be marked as notified under the Results tab within a patient record.

Note: It is important to mark results when the patient has been notified as this not only provides a record but also makes it possible to have meaningful lists.

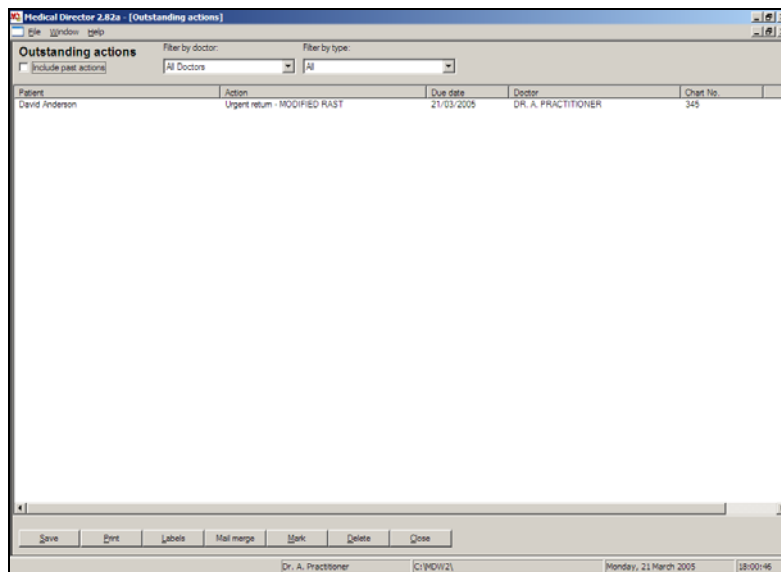
The **Unchecked** button opens the window for the doctor to check investigation results.

Outstanding Actions List

To view the Outstanding Actions list, with no patient records open, go to **Files > Outstanding Actions**.



This will bring up the list of outstanding actions which can be filtered by doctor or by type. Checking the Include past actions will bring up all the actions that have been performed.



You can **Save** this list to a file, **Print** the list, print **Labels**, or do a **Mail Merge** to a template. **Mark** allows you to mark the action as performed.

Managing Patient Recalls/Reminders

The reminder system is designed to operate in the following manner:

- ▶ Doctor defines recall/reminders for patient
- ▶ Practice staff periodically generate a patient recall/reminder list
- ▶ Patients on list are notified of due recall/reminder by either printing the list and manually contacting patients or by performing a mail merge from the generated list (this is recorded in patient notes automatically).
- ▶ During a consultation the doctor is alerted if a patient has a recall/reminder due within 30 days by the animated telephone icon

During a consultation

When a patient's record is opened a visual alert (animated telephone) will appear in the top right hand side of the patient record if the patient has a recall/reminder due within the next 30 days.

Clicking the recall button (to the right of the telephone) will open the 'Recall Items' window, this shows the current recalls/reminders due for the patient. From this window it is possible to add, remove, edit or update the recalls/reminders shown. You may also choose 'Show All' to see all recalls/reminders entered for the patient in addition to those currently due.

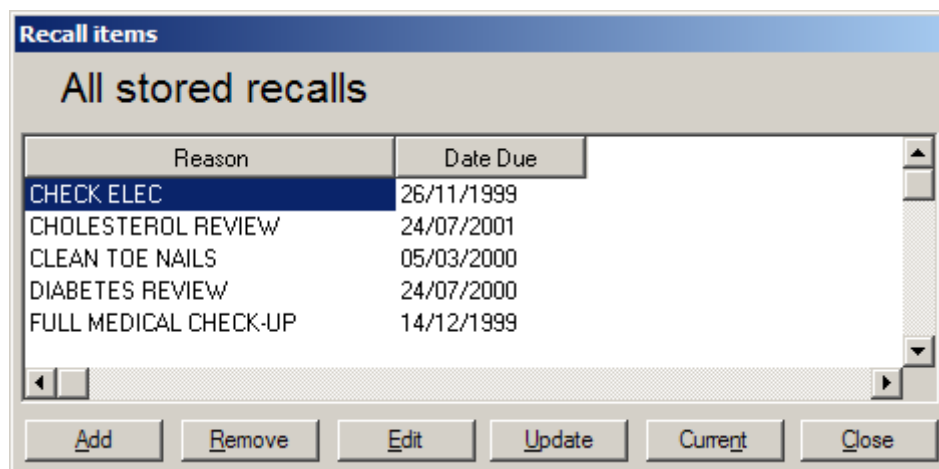
To access current recalls/reminders or to add new recalls/reminders for a patient you may also select Clinical > Recall from the menu at the top of the screen or use the keyboard shortcut Ctrl-R.

Adding Patient Recalls/Reminders

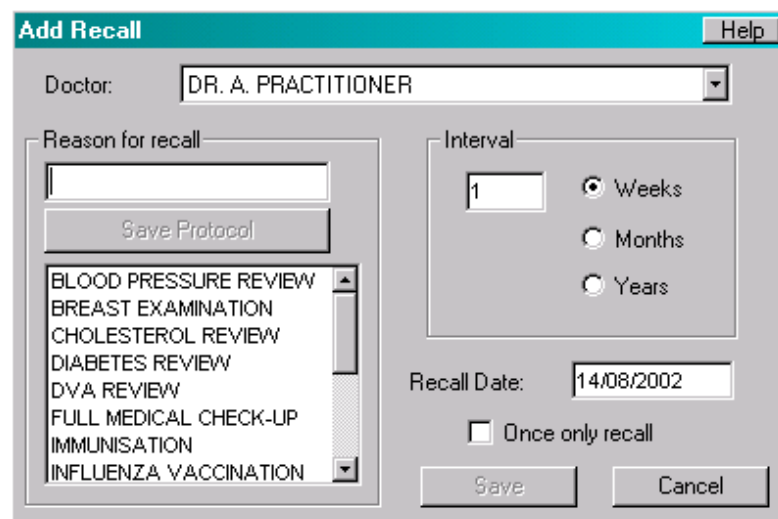
There are several ways to add reminders items to a patient's recall list. The most common and direct approach is to add reminders via the patient recall window located in the Patient's record:

To setup or add a new reminder:

- ▶ Open patient record
- ▶ Open recall window via: Clinical > Recall (Ctrl+R)



- ▶ Click the **Add** button to open the 'Add Recall' window



There are several fields where input is required, these are:

Doctor: can be used to select the doctor to whom the patient is to return.

Reason for recall: a list of standard recall/reminder protocols is displayed at the lower left. Click on a recall protocol to select it and this

will automatically select the number of number of weeks, months or years in the 'Interval' section.

If the desired reason is not shown then type the reason into the text box, set the desired time interval and then choose 'Save Protocol'. The new protocol is added to the list.

You can also *modify an existing protocol* in the same manner by selecting the protocol from the list, changing the desired time interval and selecting 'Save Protocol'. This will overwrite the existing protocol though does not affect the recall interval of patients already saved with that protocol.

You can *delete a protocol* by selecting the protocol from the list and pressing the delete key on the keyboard.

Interval: Use this section to determine when the patient should return to the doctor for a given reason.

Recall Date: This is calculated from the recall interval entered previously. This field can also be manually edited.

Once only recall: Once only items cannot be updated using the 'update' button and will be deleted when the recall is updated after printing the recall list or performing a mail merge.

- ▶ Choose **Save** to save the recall entered or choose **Cancel** to return to the patient record without adding a recall

Adding reminders from clinical areas

You can add reminders when you are in the patients record, in particular procedure areas, these include:

Immunisation

- ▶ From the immunisation tab of the patient record, select the red '+' to indicate adding a new item
- ▶ The 'Add Immunisation' window will appear
- ▶ Enter the relevant information then select **Mark for Recall**

Pap Smear

- ▶ From the smears tab of the patient record, select the red '+' to indicate adding a new item
- ▶ The 'New Pap Smear' window will appear
- ▶ Enter the relevant information then select **Mark for Recall**

Health Assessment

- ▶ From the menu at the top of the screen choose Clinical > Health Assessment
- ▶ Work through the screens adding relevant information
- ▶ Select **Add to Recall Database** and then **Save**

Pathology Results

- ▶ From the results tab of the patient record, select the red '+' to indicate adding a new item
- ▶ The 'Add Investigation Result' window will appear
- ▶ Enter the relevant information then select **Mark for Recall**
- ▶ The 'Reason for Recall' window will appear; select the required recall e.g. Cholesterol Review or type in your own reason.
- ▶ Change the interval or recall date as required.
- ▶ Select 'Once only recall' if appropriate and then **Save**

Review Patient

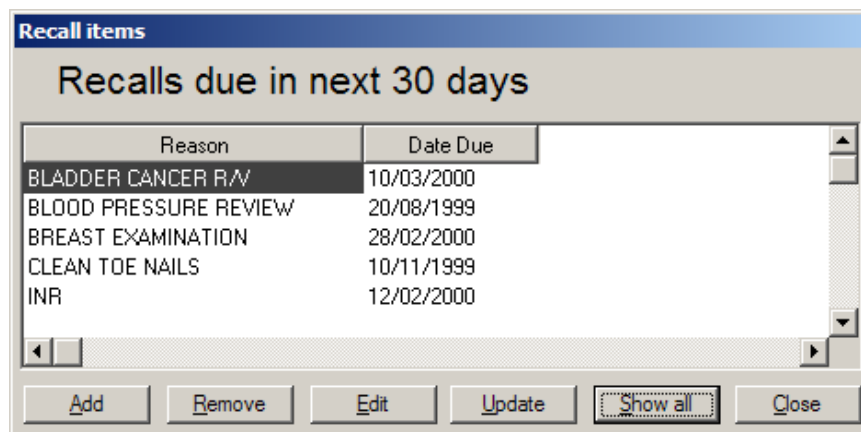
- ▶ From the progress notes tab of the patient record choose **Review** from the bottom left series of buttons on the screen.
- ▶ The 'Review Interval' window will appear.
- ▶ Select the date and then **Add to Recall Database**.
- ▶ Select **OK**

Viewing and Modifying Recalls/Reminders

From the initial 'Recall Items' window you may also choose to view, remove or update a recall/reminder.

Viewing Patient Recalls/Reminders

You are able to toggle between current and all recalls/reminders for the patient.



Current: will display all recalls/reminders due for the patient within the next 30 days.

Show All: will display all recalls/reminders entered for the patient.

Removing Patient Recalls/Reminders

Select the recall/reminders from the displayed list and choose **Remove**.

Editing Patient Recalls/Reminders

Select the recall/reminders from the displayed list and choose **Edit**.

This allows the recall/reminder date to be changed. Click Save when the date has been changed.

This option is not available for 'Once only' recalls/reminders.

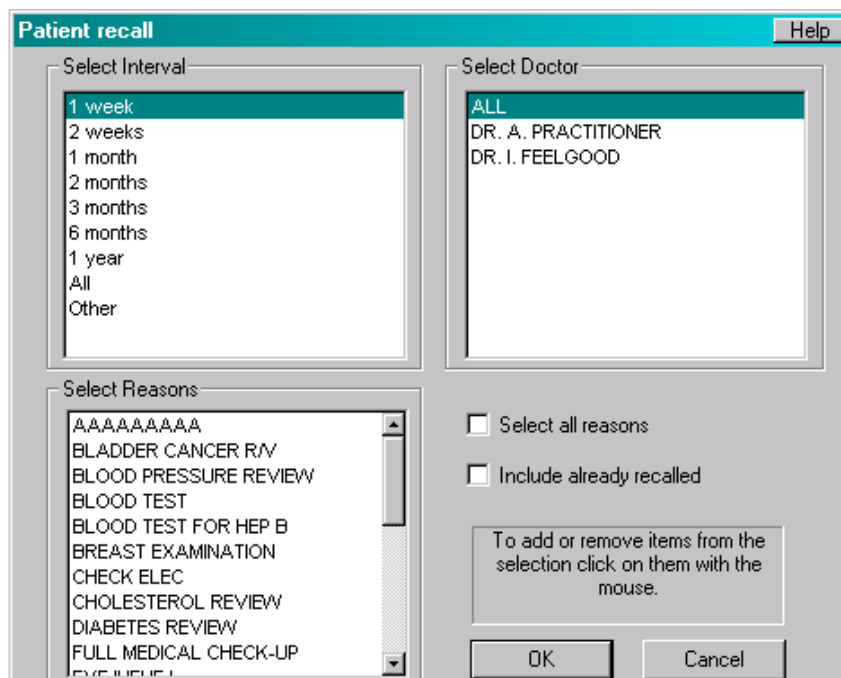
Updating Patient Recalls/Reminders

During a recall/reminder consultation the **Update** button is used to add the original time interval to the current date and update the recall/reminders. Recall/reminders items can also be automatically updated when printing Patient Recall lists.

Recalling Patients

Generating a patient recall/reminder list takes place from the main menu.

- ▶ Choose Search > Recalls
- ▶ The recall list screen opens and the 'Patient Recall' window appears



- ▶ The window prompts for you to define the criteria required.

Select Interval: Select the desired interval, e.g. Patient due for recall in the next month.

Select Doctor: can include all doctors or specify a doctor(s)

Select Reasons: select one, multiple or all reasons for the recall/reminder

Include already recalled: used to include patients in the list who have already been included in a prior recall or mail merge, this may be because the printer failed or because all patients were not contacted from the previous list.

- ▶ Select **OK** and Medical Director will generate a recall list which includes the following information for each patient: Surname, First Name, Reason, Recall Date, Doctor, Address, DOB, Sex, Phone, Business Phone, Medicare No., Pension No. and Chart No.
- ▶ Once the list is generated you have several tasks which can be performed and are indicated by the buttons at the bottom of the screen.

Add recalls to action list: adds all the recalls listed to the action list

Open: opens the patient record of a highlighted patient.

Save: allow you to save the file as a database file for viewing or editing within another program (i.e. MS Excel or MS Access)

Print: prints the entire list of patients generated. This may be a different format from that shown on the screen

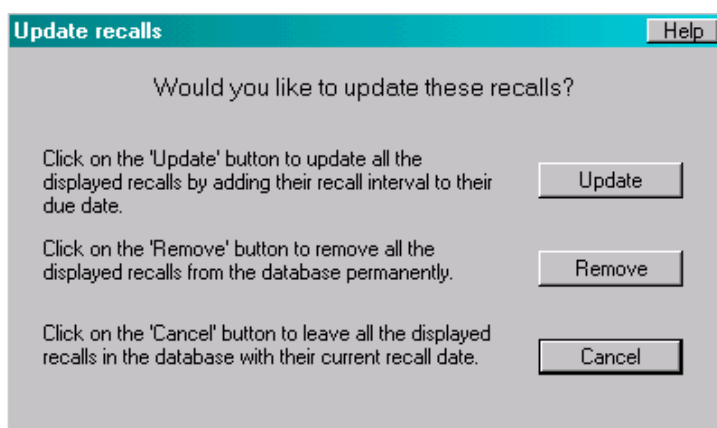
Labels: allows you to print address labels for the patients on the list

Mail Merge: allows you to perform a mail merge using a recall/reminder letter template within Medical Director. A copy of the letter is stored in the patient's letters file. Note: Mail merge letters go straight to the printer (no print preview).

Close: Close the list and return to the main screen.

Delete: To delete an item from the list, highlight the item and press the **Delete** key

- ▶ When you use the 'Print', 'Save', 'Labels' or 'Mail Merge' options you will be prompted on updating the records as follows:



- ▶ If the Update option is chosen, all of the recall entries are updated and the recalls/reminders are added to the 'Actions' databaset and appear on the "Outstanding Actions" list or as an "Outstanding Action" when the patient record is opened.
- ▶ It is recommended that the Cancel option is chosen and the patient recalls/reminders are updated when the patient attends the clinic.

To Reformat the Printed Recall List

The columns and column widths of the recall list can be adjusted.

With no patient records open

Select **Tools > Print Options** and click on the **Recall sheet** tab

Select the items to printed and the column widths

Click **Save**

Tidying up the recall list

Medical Director comes with a predefined set of recall reasons and intervals, but GPs frequently add their own, sometimes inadvertently. If the list becomes difficult to manage, it can be tidied up by merging reasons or deleting unused reasons. It is a good idea to have a formal procedure in a practice for adding recall reasons.

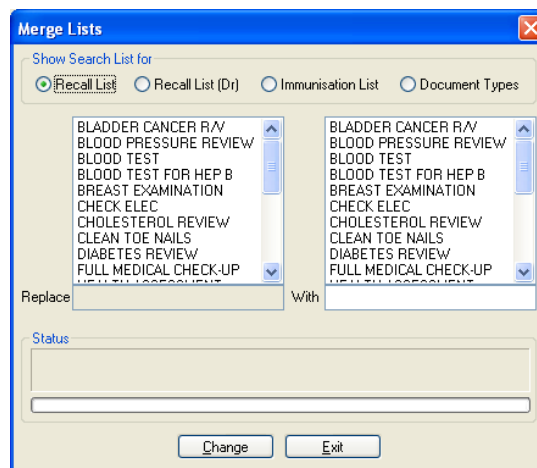
To merge recall/reminder reasons

Close Medical Director and do a backup.

Start MD maintenance either from Start > Programs > Medical Director > Maintenance or from the icon on the desktop.

Click on the Data Management tab

Click on the Merge Search Lists button, the following window will appear



Select Recall List (Recall List (Dr) is provided for handling custom 'free text' reasons type in the doctor)

Select the reason you wish to merge (the one you want to replace) from the list on the left, the name appears in the grey **Replace** box.

Select the reason you wish to replace it with from the list on the right. If the reason does not appear, you may type your own in the **With** box

Click **Change** to begin the replacement

Repeat the steps until you have completed the replacements needed

Click **Exit** to close the utility

To delete reasons:

First use the **Search recalls** facility to identify patients with recalls for the reasons, and update the patient records if required

Note: If a recall reason is deleted, the recall is not deleted from the patient record, and can be searched for under the **Search** facility, but will not appear on the recall list

Open the recall window as if to add a recall/reminder

Click on the reason to be deleted to highlight it, and press the **Delete** key

Action List

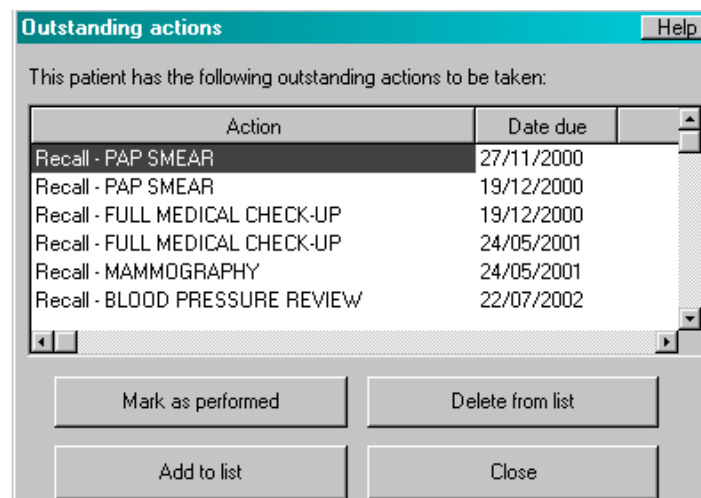
The Action function can be used for recording special needs or actions to be performed. Actions are entered into the actions database from either the clinical menu of a patients record, when printing the investigations list or when processing a recall list. Upon entering a patient record the doctor is prompted with any outstanding actions. All Outstanding actions may also be viewed in the actions database.

Setting up the Action List

- ▶ From the main menu select Tools > Options
- ▶ Select the 'Prompts' tab and under 'Patient Prompts' ensure that the Action List checkbox has a tick in it.

Using the Action List

- ▶ From the patient record select Clinical > Action List
- ▶ You have the option here to add or delete an action, or to mark an action as performed.



Viewing Outstanding Actions

All actions entered into the actions database can be viewed via the main menu by selecting: Files > Outstanding Actions.

This displays a list of all actions not yet performed. The window offers the ability to include past actions, as well as to filter actions by doctor or type.

The bottom of the 'Outstanding Actions' window offers several options:

Save: allow you to save the file as a database file for viewing or editing within another program (i.e. MS Excel or MS Access)

Print: prints the list of actions.

Labels: allows you to print address labels for the patients on the list

Mail Merge: allows you to perform a mail merge using a letter template within Medical Director, once printed a copy of the letter will be added to the patient's record.

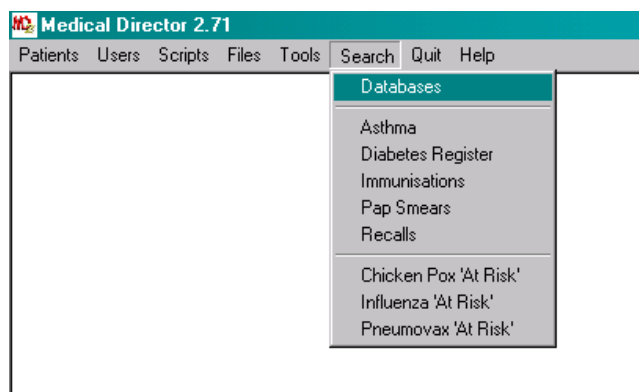
Mark: Mark the action as being performed, this removes the action from the patient's outstanding actions list.

Delete: Removes the action from the list.

Close: Close the list and return to the main screen.

Searching Databases

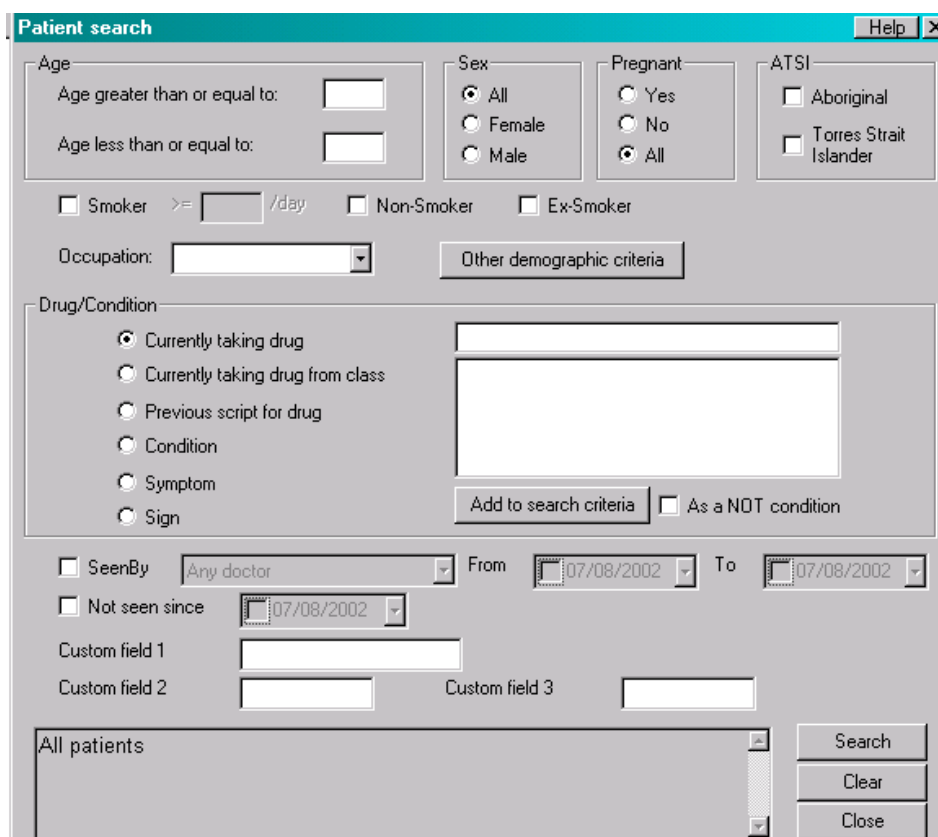
The Search function on the main menu is a powerful tool for accessing information stored in the databases of Medical Director.



Databases

This utility can be used to produce a list of patients matching criteria selected by the user. It is accessed via the main menu: Search > Databases

- ▶ The 'Patient Search' window appears and required criteria can be entered.

A screenshot of the "Patient search" window. The window has a title bar with "Patient search" and "Help X" buttons. The main area contains several sections of search criteria:

- Age:** Two input fields for "Age greater than or equal to:" and "Age less than or equal to:".
- Sex:** Radio buttons for "All", "Female", and "Male".
- Pregnant:** Radio buttons for "Yes", "No", and "All".
- ATSI:** Checkboxes for "Aboriginal" and "Torres Strait Islander".
- Smoking:** Checkboxes for "Smoker" (with a "/day" field), "Non-Smoker", and "Ex-Smoker".
- Occupation:** A dropdown menu and a button labeled "Other demographic criteria".
- Drug/Condition:** Radio buttons for "Currently taking drug", "Currently taking drug from class", "Previous script for drug", "Condition", "Symptom", and "Sign". A large text input field is present, along with "Add to search criteria" and "As a NOT condition" options.
- SeenBy:** A dropdown menu set to "Any doctor", "From" and "To" date pickers both set to "07/08/2002".
- Not seen since:** A date picker set to "07/08/2002".
- Custom fields:** Three input fields labeled "Custom field 1", "Custom field 2", and "Custom field 3".

At the bottom, there is a list box containing "All patients" and three buttons: "Search", "Clear", and "Close".

- ▶ The description of your particular search will be displayed in the box at the bottom of the screen.

- ▶ The custom fields relate to fields that you can set in the 'Notes' section of the Patient Details window (In patient file: Edit > Patient Details and select notes tab).
- ▶ Click the **Clear** button on the right to reset the search criteria.
- ▶ Upon viewing the resulting list of patients there are several options at the bottom of the screen:

Setup Search Criteria: restart your search with new criteria

Open: open a selected patient record

Recall: add a recall entry to the record of every patient listed

Save: save the list as a DBF file for use in another program

Print: print the list

Labels: print patient labels

Mail Merge: perform mail merge with a medical director template document

Close: returns to main menu

Specific Searches

Asthma

- ▶ Accessed via the main menu: Search > Asthma
- ▶ Allows the user to perform an asthma search using search criteria specific to asthma

Asthma Search Help X

Search for

all patients who have asthma listed in their past history

patients who have Asthma listed in their Past History and

whose last Asthma Action Plan was recorded > 1 year ago

who have no Asthma Plan recorded

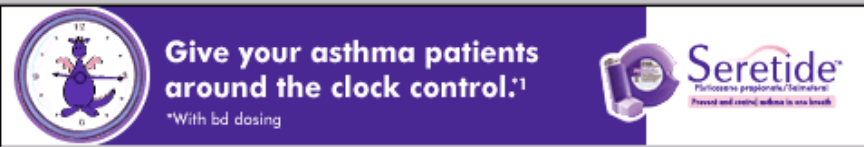
who have not had a visit recorded within the last year

or

patients who do not have Asthma listed in their Past history, but have an Asthma Action Plan recorded

Only include if Asthma is marked as an Active condition?

Born between and

**Give your asthma patients around the clock control.***
*With bd dosing
Seretide
Fluticasone propionate/Salmeterol
Prevent and control asthma in one breath.

Before prescribing, please refer to Product Information in this program by clicking on PI.

Diabetes Register

- ▶ Accessed via the main menu: Search > Diabetes Register

Name	Last visit	HBA1C	Eye exam	Foot exam	Height	Weight	BP	Lipids	Microalbumin	Diabetes recall
John Andrews	15/07/2003	13/02/2000	12/12/1999	//	13/02/2000	13/02/2000	13/02/2000	13/02/2000	13/02/2000	15/01/2004
Michael Andrews	15/07/2003	//	//	//	//	//	//	//	//	

- ▶ Displays all of the patients who have been recorded as being diagnosed with diabetes mellitus along with the dates that nine activity items have been added or amended.
- ▶ Has an option to include patients with Gestational Diabetes
- ▶ The 'Display when next due' checkbox allows you to toggle between displaying the date an activity was last performed and the date when an activity is next due
- ▶ Items displayed in red indicate that attention is due for that item
- ▶ This screen offers several options at the bottom:

Select All/Deselect All: selects or deselect patients, places an asterisk next to patient

Summary: provides a diabetes summary for a selected patient

Statistics: provides statistics for the entire diabetes register

Open patient: opens selected patient

Add Recall: adds a recall entry to patients selected

Print list: prints list of patients

Close: returns to main menu

Immunisations

- ▶ Accessed via the main menu: Search > Immunisations

The 'Immunisation list' window contains the following elements:

- Select Interval:** All, Today, Yesterday, 1 Week, 1 Month, 3 Months, 6 Months, 1 Year, Other
- Select Doctor:** All doctors, DR. A. PRACTITIONER, DR. I. FEELGOOD
- Select Immunisations:** ACELLULAR DTP, ADT, CDT, CHOLERA, DTP, HEPATITIS A, HEPATITIS B, HIB, HIBTITER, INFLUENZA, MMR
- Checkboxes:**
 - Ignore if previously printed
 - Childhood immunisations only
 - Over 65/ATSI over 50
 - Select all
 - Exclude if not given here
- Text Box:** To add or remove items from the selection click on them with the mouse.
- Buttons:** OK, Cancel

- ▶ The 'Immunisation list' window appears
- ▶ Select criteria according to needs

Pap Smears

- ▶ Accessed via the main menu: Search > Pap Smears

The 'Pap Smear search' window contains the following elements:

- Search for:**
 - Last smear > 1 year ago
 - Last smear > 2 years ago
 - Last smear > 4 years ago
 - No recorded smears
 - Custom search
- Born between:** 06/08/1932 and 07/08/1989
- Custom criteria:**
 - Result of smear:** Negative, Unsatisfactory, Low Grade abnormality, High Grade abnormality, Inconclusive, Inflammatory, Atypia, C.I.N. 1, C.I.N. 2, C.I.N. 3, Invasive Ca.
 - Endocervical cells present:** Yes, No, All
 - HPV changes present:** Yes, No, All
 - Time interval:** > < [] Months
- Buttons:** Search, Cancel

- ▶ Enter required criteria

Chicken Pox 'At Risk'

- ▶ Accessed via main menu: Search > Chicken Pox 'At Risk'
- ▶ Searches the database for all patients between 12 months and 12 years of age who have never been immunised against or have had Chicken Pox.

Influenza 'At Risk'

- ▶ Accessed via main menu: Search > Influenza 'At Risk'
- ▶ You may search all patients over 65 years of age or you may specify a typically at risk population in the age group below 65.

Influenza 'At risk' search Help

Select age: > 65 yrs (1)
< 65 yrs (2)

Note 1: >=50Yrs for Aboriginals and Torres Straight Islanders
Note 2: <50Yrs for Aboriginals and Torres Straight Islanders

Condition(s): Select All conditions

Chronic respiratory disease	<input type="checkbox"/>	Asthma	<input type="checkbox"/>
Heart failure/Cardiomyopathy	<input type="checkbox"/>	Congenital Heart Disease	<input type="checkbox"/>
Diabetes Mellitus	<input type="checkbox"/>	Renal Dysfunction	<input type="checkbox"/>
Cystic Fibrosis	<input type="checkbox"/>	Immunosuppression	<input type="checkbox"/>
Haemoglobinopathies	<input type="checkbox"/>	Smokes > 25/day	<input type="checkbox"/>

AUTOreport

Pneumovax 'At Risk'

- ▶ Accessed via main menu: Search > Pneumovax 'At Risk'
- ▶ You may search all patients over 65 years of age or you may specify a typically at risk population in the age group below 65.