



MMEEx User Manual

Managing Patient Follow-up

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Managing Patient Follow-up

Acknowledgement of IUIH

We would like to thank the [Institute of Urban Indigenous Health](#) (Queensland) for sharing their clinic workflows which are the framework for these workflow pages.

These workflows are intended as a guide only, to show how you might use MMEx to efficiently manage patients and workload.

Patient Follow-up

Patient follow up in primary health care can be organised by:

1. Opportunistic follow up
2. One off recalls
3. Long term/recurring recalls

MMEx is set up to help staff manage all types of patient recall.

Opportunistic follow up

The most resource efficient way to provide timely care and follow up is to complete tasks when the patient is attending for another reason. It recognises that the patient is already present and quite often willing to participate in health care/promotion beyond what they had originally attended the clinic for. It adds value to every patient-staff contact.

For effective opportunistic care, health services must

- know what follow up/monitoring the patient is due for
- be organised to offer this as the patient attends their service

Using MMEx, staff are prompted to provide opportunistic care through the patient's 'To Do List'. The To Do List button is found on the Patient's Summary screen. It is coloured red when there are outstanding tasks or activities to be done.

JB Bloggs, Jimmy (Joe), Mr

JB Bloggs, Jimmy (Joe), Mr 6 0:25 Bill Patient To Do List

DOB 9/02/1965 **Address** 23 Jump Street, West Perth Perth, WA 6005
Age 53 **Phone** 3800 0000
Gender Male **Emergency Contact** Mrs Julie Bloggs (Wife)

Problems Asthma
Alerts Test Alert2, NSAIDs not indicated
Allergies bees, Penicillamine, Penicillins, Phenergan
Patient Tags Diabetes Education Group, Exercise Group, Stop Smoking Group, WBS **Primary**
 The Viewer

Within the To Do List:

- The Tasks tab lists the one off / short term tasks – these tasks are created by an MMEx user
- The Care Plan Activities tab lists the long term surveillance / monitoring for lifetime surveillance or known health problems (which are currently due / overdue) – these activities are generated by the Care Plans which have been applied to the patient.

To Do List

Patient Name Jimmy Bloggs

Patient Alerts: Test Alert2, NSAIDs not indicated

Tasks Care Plan Activities Observations

Completing a Task

To Do List

Patient Name Jimmy Bloggs **DOB** 9/02/1965

Patient Alerts: Test Alert2, NSAIDs not indicated

Tasks Care Plan Activities Observations

Type keywords... Not Completed Show current All Importances See All Tasks Print New Task

Advanced

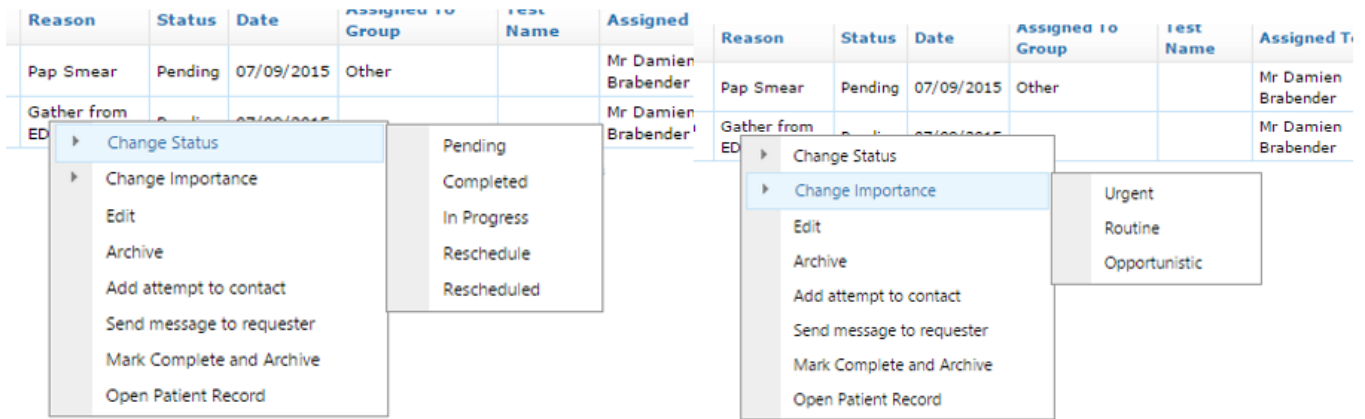
Date From **Date To** **Organisation** Any Org **Group** Any

Assigned To User Any Assignee **Assigned By User** Any Assignee **Reason** Any Reason Filter

Clear Export

Task	Reason	Status	Date	Assigned To Group	Test Name	Assigned To	Assigned By	Importance	Contacted
<input type="checkbox"/>	Recall Patient	Pending	24/11/2015	Other		Mr Damien Brabender	Mr Damien Brabender	Routine	0 attempts

Right-Click will reveal a menu with a range of options to assist you to manage the task.



You can also track your attempts to contact a patient about this task.

Edit Task

Total Attempts	1
Date	04/06/2018 <input type="button" value="Calendar"/>
Comment	<input style="width: 100%;" type="text"/>

Attempts To Contact

Date	Comment	
04/06/2018	Left message for patient to call back	<input type="button" value="Remove"/>

Additional Information about the **Tasks** Feature can be found [here](#)

Completing a Care Plan Activity

As patients are seen, staff decide what follow up can be included in the current consult (within their scope of practice) and may decide with the patient to schedule a further appointment to complete any outstanding tasks and reviews if necessary.

To Do List

Patient Name	Jimmy Bloggs	DOB	9/02/1965
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Patient Alerts: Test Alert2, NSAIDs not indicated

Tasks **Care Plan Activities** Observations

Save Selected Activities **Activities performed on** Today Specify Date

Blood Pathology

HbA1c - Overdue (09/04/2018) + Expand

Blood sugar Level - Overdue (10/09/2017) + Expand

Calcium - Overdue (15/05/2018) + Expand

eGFR - Overdue (15/05/2018) + Expand

Expand the **Care Plan Activity** and enter the relevant information in the available fields. You may add additional comments to detail where, when or by whom the task was completed if it was done elsewhere, or on a different date.

Click **Save Selected Activities**

Tasks **Care Plan Activities** Observations

Save Selected Activities **Activities performed on** Today Specify Date

Blood Pathology

HbA1c - Overdue (09/04/2018) + Expand

Calcium - Overdue (15/05/2018) Mark Completed Collapse

And the task will be removed from the **To Do List**. You may complete multiple tasks and save them all with one click.

When patients don't attend within the time due to meet all their screening / follow up needs opportunistically (or when resources to maximise opportunistic care are insufficient / less organised), the health service has a duty of care to organise the recall of patients who are due or have become overdue for their essential follow up care.

Recalls

Organising recalls can be done by searching **Tasks** and **Care Plan Activities**

One-off recalls

One off recalls are best managed as **Tasks** in MMEEx.

Tasks are set up to prompt separately to care plans to ensure they stand out and not be mixed in with other routine care plan prompts. (E.g. a high BP is observed in a patient with no previous history of hypertension. Their BP needs to be repeated before a diagnosis and management commenced. Adding the follow up BP review as a **Task** means it can be searched for easily – without being lost amongst care plan prompts for BP checks.)

You can add a new task using the **New Task** button. Additional Information about the Tasks Feature can be found [here](#)

To Do List

Patient Name Jimmy Bloggs DOB 9/02/1965

Patient Alerts: Test Alert2, NSAIDs not indicated

Tasks Care Plan Activities Observations

Type keywords... Not Completed Show current All Importances See All Tasks Print **+ New Task**

Advanced

Date From Date To Organisation Group

Any Org Any

Assigned To User Assigned By User Reason

Any Assignee Any Assignee Any Reason Filter

Clear Export

Task	Reason	Status	Date	Assigned To Group	Test Name	Assigned To	Assigned By	Importance	Contacted
Recall Patient	Medication Review and Update	Pending	24/11/2015	Other		Mr Damien Brabender	Mr Damien Brabender	Routine	1 attempt

It is recommended that Services designate a staff member(s) to oversee the MMEEx Task list. Responsibilities would include:

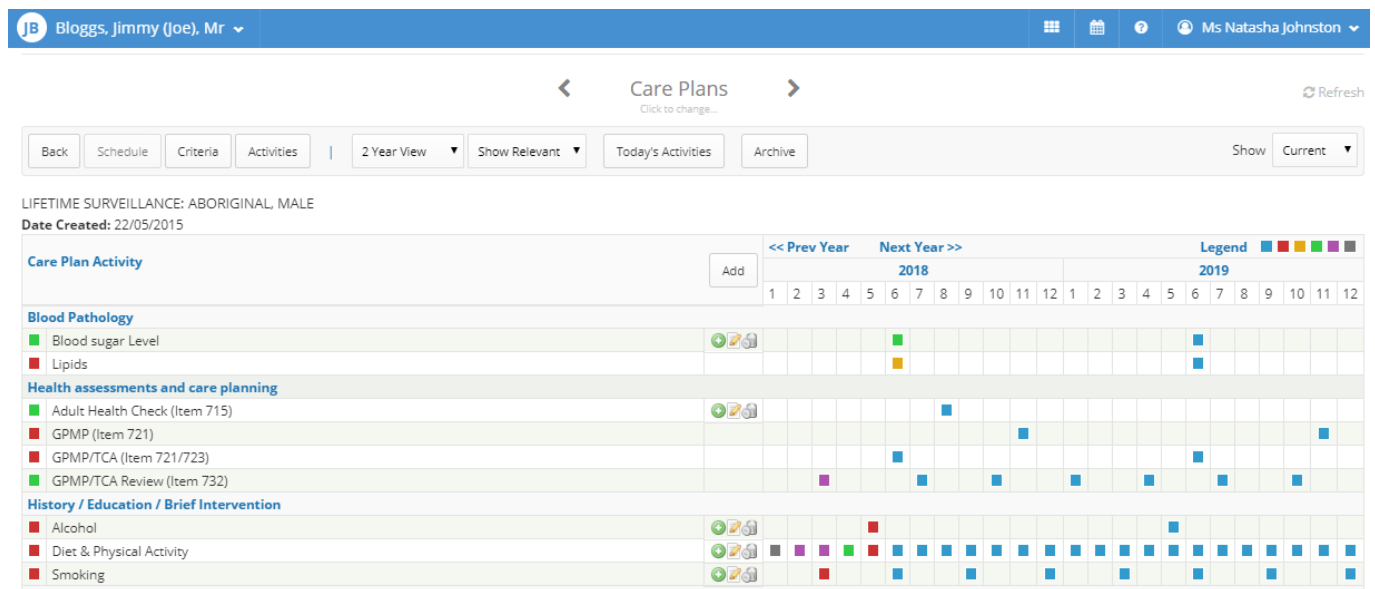
- A daily search for tasks that are overdue and due today and provide direction/support to staff to perform them
- Ensure priority is given to the most urgent Tasks and that staff update each Task when complete (or attempt to perform).
- Archive each Task once they are complete
- Services should agree on the number of attempts staff should make to complete. Once this is reached, staff can send the requester a message to decide whether follow up can be abandoned (and the Task can be archived without completion) or whether the service should keep trying.
- Encourage discussion of any issues regarding managing Tasks with individual staff and at staff meetings.

Long term (Ongoing) recalls

Long term recalls are best managed through MMEEx Care Plans

The reasons these need to be organised separately to **Tasks** include:

- The MMEEx **Lifetime Surveillance Care Plan** sets the foundation to manage long term screening, immunisation and health promotion throughout life and are based on the patient's age, gender and ethnicity.
- As significant health risks/problems which require long term monitoring are diagnosed, additional care plans can be assigned and together these form an integrated schedule and standing order of care for the patient.
- Criteria for diagnosis must be met before an **Care Plan** is assigned, so while these criteria is still being established, Tasks should be used to ensure these patients are followed up.
- Assigning a **Care Plan** applies a schedule of evidence based care which updates the **Lifetime Surveillance Care Plan** schedule. This integrated schedule is reportable – it informs reports on disease prevalence, coverage of care provision and identifies which patients are overdue essential care (or becoming due timely care in the near future).



Additional information about **Care Plans** is available [here](#).

It is recommended that Health Services designate a staff member(s) who are responsible for regularly pulling recall information from MMEEx and organising the health team to perform the work and update MMEEx information.

Bulk Mailouts - recall letters for Care Plan Activities

Reports / Patient Reporting provides an option to generate a Bulk Action of Recall letters to be sent to Patients for specific Care Plan Activities

Your service may create templates for frequent “recall” activities such as:

- 715 Recall Letter
- Childhood Immunisation Recall
- GPMP Recall
- GPMP Review Recall
- Pap Smear Recall

• Fluvax Recall

These letters are set up in a Word doc and uploaded to Reminder Mailing. Selecting appropriate letters will generate a multipage Word doc with an individual patient letter per page. These letters can be mailed, or given to a worker to hand deliver to a patient.

Open the **Reports** page and select **Patient Reporting** Select the relevant **Demographic** parameters For Example:

Patient Reporting

Saved Queries: New query Manage Query Templates

Demographic Consent Smoking Care Plans Care Plan Activities Results Medications Antenatal Medical History Columns

Gender	<input checked="" type="checkbox"/> Male <input checked="" type="checkbox"/> Female <input type="checkbox"/> Unknown <input type="checkbox"/> Unspecified	Aboriginality	<input checked="" type="checkbox"/> Aboriginal <input checked="" type="checkbox"/> TSI <input checked="" type="checkbox"/> ATSI <input checked="" type="checkbox"/> Neither <input checked="" type="checkbox"/> Unknown
Postcode	Any	Medicare Number	Any
Age	From <input type="text"/> years to <input type="text"/> years	Health Fund	Any
Patient-Provider Status	All	Patient Status	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Inactive Show: <input checked="" type="radio"/> All <input type="radio"/> Deceased <input type="radio"/> Alive
Attendance	Any		
My Patients	<input type="checkbox"/>		
Patient Record Created Date	From: <input type="text"/> To: <input type="text"/>		
Community	<input checked="" type="checkbox"/> All Communities <input type="checkbox"/> Kununurra	<input checked="" type="checkbox"/> No Community Specified <input type="checkbox"/> Pormpuraaw	<input type="checkbox"/> Aurukun <input type="checkbox"/> Warmun / Turkey Creek <input type="checkbox"/> Hopevale <input type="checkbox"/> Wollongong
Tags	<input checked="" type="checkbox"/> All <input type="checkbox"/> Antenatal Group <input type="checkbox"/> CTG <input type="checkbox"/> Drug seeker <input type="checkbox"/> Healthy Lifestyle <input type="checkbox"/> Mums & Bubs <input type="checkbox"/> New group <input type="checkbox"/> Self-Managing <input type="checkbox"/> Tuesday Walking Group	<input type="checkbox"/> 30/50 diabetes group <input type="checkbox"/> Batmobile <input type="checkbox"/> Diabetes <input type="checkbox"/> Exercise Group <input type="checkbox"/> Home O2 <input type="checkbox"/> NDIS <input type="checkbox"/> Public Guardian <input type="checkbox"/> Shannon <input type="checkbox"/> WBS	<input type="checkbox"/> Allergic <input type="checkbox"/> Child care <input type="checkbox"/> Diabetes Education Group <input type="checkbox"/> Group X <input type="checkbox"/> ITC Program <input type="checkbox"/> NDIS client <input type="checkbox"/> Research group <input type="checkbox"/> Stop Smoking Group <input type="checkbox"/> Yoga <input type="checkbox"/> Anonymous <input type="checkbox"/> Cognitive Therapy <input type="checkbox"/> Drug Awareness group <input type="checkbox"/> Healthy Heart <input type="checkbox"/> Men's Group <input type="checkbox"/> Needs transport <input type="checkbox"/> Research Group Y <input type="checkbox"/> Test Group <input type="checkbox"/> Young Mens MH Group

Search Review Clear Search Save As New Query

From the **Care Plan Activities** tab select the relevant care plan activity for which you want to generate recall letters.

For Example:

Demographic Consent Smoking Care Plans Care Plan Activities Results Medications Medical History Columns

New Care Plan Filter

Care Plan: Any

Activity/Immunisations: Activity Immunisations

Activity: Adult Health Check (Item 715)

Where the activity is: becoming due within the next 7 days

Add Filter

Active Care Plan Activity Filters

Patients that match Any of these filters.

Caveats: This will only match patients with pending or overdue events. Cancelled, completed or in-progress events will not be matched. This will also not match patients who do not have a valid DOB entered.

Care Plan	Activity/Immunisations	Due
Any	Adult Health Check (Item 715)	Becoming due within the next 7 days

Remove Filter

Search Review Clear Search Save As New Query

Patient gender: Male, Female
 ATSI status: Aboriginal, TSI, ATSI
 Patient activity: Active
 Patient provider status: Primary (Regular) Patients
 Patient matches any of the following care plan activities:
 Care plan: Any; Activity: Adult Health Check (Item 715); becoming due within the next 7 days

Male: 9 Female: 14 Total: 23

Bulk Action Select Bulk Action Export to Excel Show all results

After selecting ALL parameters for a care plan activities recall report, run the report by clicking **Search**

Patient Reporting

Saved Queries: New query Manage Query Templates

Demographic Consent Smoking Care Plans **Care Plan Activities** Results Medications Antenatal Medical History Columns

New Care Plan Filter

Care Plan: Any

Activity/Immunisations: Activity Immunisations

Activity: Adult Health Check (Item 715)

Where the activity is: becoming due within the next 7 days

Active Care Plan Activity Filters

Patients that match Any of these filters.

List all activities during the time frame

Caveats: This will only match patients with pending or overdue events. Cancelled, completed or in-progress events will not be matched. This will also **not match** patients who do not have a valid DOB entered.

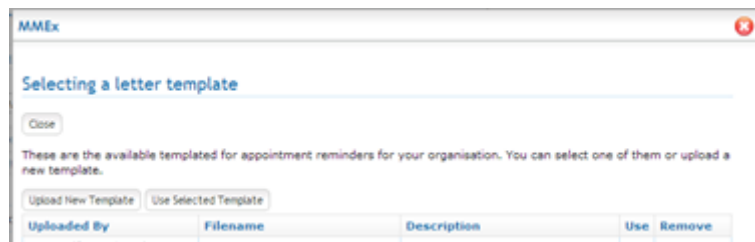
Care Plan	Activity/Immunisations	Due	
Any	Adult Health Check (Item 715)	Becoming due within the next 7 days	<input type="button" value="Remove Filter"/>


Patient gender: Male, Female
 Patient activity: Active
 Patient matches any of the following care plan activities:
 Care plan: Any; Activity: Adult Health Check (Item 715); becoming due within the next 7 days

Male: 1 Female: 0 Total: 1

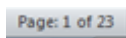
ID	Last Name	First Name	DOB	Age	Medicare Number	Gender	URN	Matching Activities
1697	Adult	Test	1/01/1985	33		Male		Adult Health Check (Item 715) (Last Complete: 09/06/2017, Next Due: 09/06/2018)

When you have a list of names select *Generate Letters* from the bulk action drop down box Click on **Bulk Action** This opens a new box



Click on Use next to the Required Template  Click **Use Selected Template** This will generate a Word doc with multiple pages. This will open in Downloads as a *Reminder Letters.doc* (usually on bottom left of screen). Clicking on the download will open Word. Click **Enable Editing** to open.

When the Word document has opened, the bottom left will indicate how many pages are generated



When word doc is generated check that there are no TEST patients there, you can delete them by highlighting and deleting just the relevant pages - or by selecting only the relevant pages to print.

The word doc will generate a letter per page for each patient and the relevant recall.

The following is a sample RECALL letter. Note that all templates created autofill with the date and patients details. However the sender (eg Clinic Nurse or Practice Manager) is hard typed into the initial template.

<<PatientName>>
<<PatientAddress>>

28/04/2014

Dear <<PatientName>>,

Our records show that you are due for your **annual health check**. Please call our friendly staff to **organise** an appointment at your earliest convenience

Please remember to let the front reception know when you are booking that you would like to book for a health check.

When you visit our clinic remember to bring your Medicare card for verification.

We look forward to seeing you soon.

Regards