Optician Management Software

User Guides - **Recalls**

How to use your Blink OMS system to keep in touch with patients through recalls, letters, emails and sms messages

The Recalls section of Blink can be used to get in touch with patients for a variety of reasons:

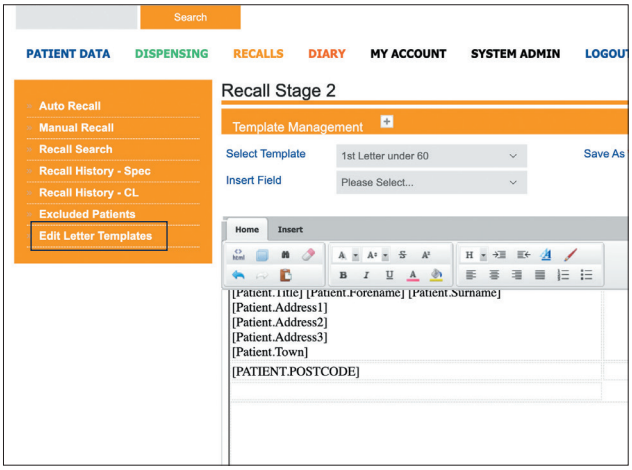
- examinations due
- special offers
- practice notifications

Recall Templates

The first thing to do before sending any type of recall is to set up the templates.

Recalls -> Edit Letter Templates - > Select Template

Here you will find a number of pre-populated templates. You can work over the top of these templates or set up new ones.

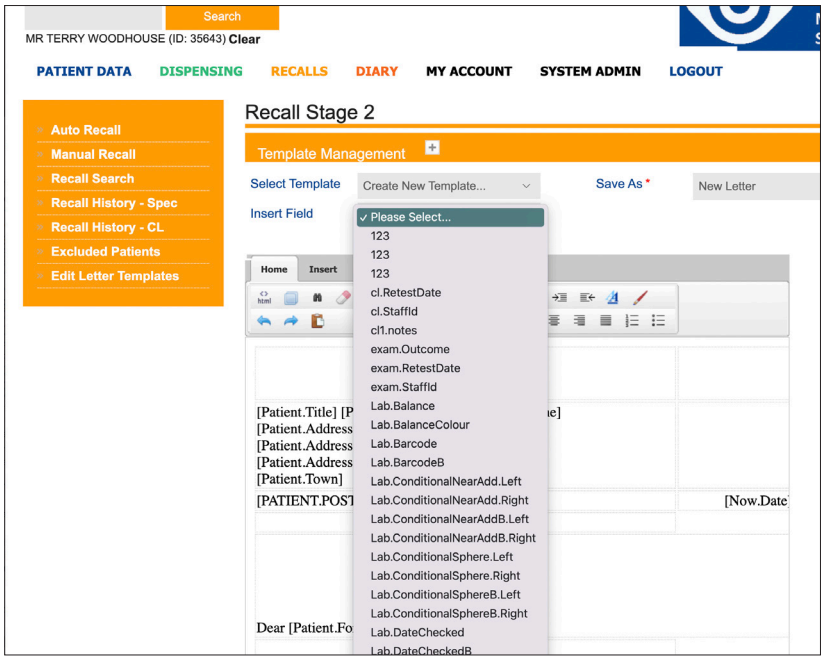


To create a new template based on an existing one, you can follow these steps:

- Select the base template
- Change the ‘Selected Template’ field to ‘Create New Template’ (the original template will still be visible)
- Make your changes to the new template

- Enter a name for the new template into the ‘Save As’ box
- Click on the ‘Save’ button

If you would like any of your templates to be populated with patient name, address or examination date, it is a good idea to work over one of the existing templates. Any information within square brackets [ ] is populated from the patient information stored within their patient data on the Blink system.



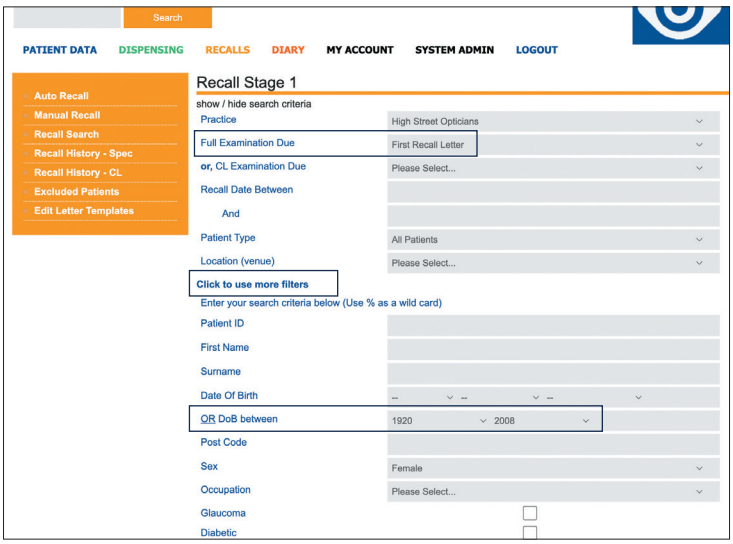
When editing a template the ‘Insert Field’ dropdown box contains all possible info that can be ‘merged’ into your final letter/email/sms.

- The merge tags should be entered inside square brackets [ ]
- Not all tags can be used in all templates.
- An additional tag which can be used in SMS specific templates is [BR] – this will insert a line break into your SMS

If you would like to include a logo or any image into any of the templates you can either:

- Hotlink to an image on the internet and insert it into the template using a <img /> html tag
- Embed an image directly into the template. The best way to do this is to save the image into a MS Word document, then copy and paste the image from Word into the Blink template. Images should be resized BEFORE saving them in the Word document, as a large image is likely to crash Blink when you try to use the template. We can help to do this.

Manual Recall - Use to send examinations due reminders



You can generate a list and send a reminder to all patients due an eye test.

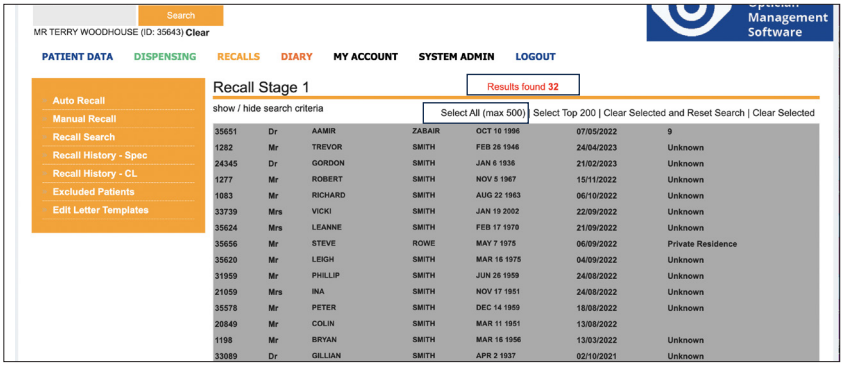
This list takes the examination due date from patients last examination.

To generate this list go to:

- Recalls and select ‘Manual Recalls’
- Full Examination Due - select ‘First Recall Letter’
- Leave the date section blank to find ALL patients who require a First Recall Letter and whose recall date has already passed.
- Select specific recall dates to narrow down the search in ‘Recall Date Between’, for example to select all patients who are due for a recall ‘next month’
- Narrow down the search further (if required) by choosing a patient type or by using the ‘Click to use more filters’ section. In this section you could for example exclude children from the recall by choosing the relevant date of birth dates (as shown in the image above)

Select ‘Find’ and all patient who haven’t received a first recall letter will be listed.

- At the top of the list in red will be the number of results found
- Select all (if you have more than 500 patients you will need to send the first 500 and re-run the process again). Alternatively click individual patients to select just a few patients.
- Select the Next button



This will take you to 'Recall Stage 2'. Here you can choose the relevant template and select a way to send the recall - see overleaf.

- Select template - from the drop down menu select the relevant template
- At the bottom of the page select the sending method
- Tick the 'clinical reasons' button. This is for GDPR – if you are using this method to send non-clinical marketing material and therefore don't tick the box, then only patients who have opted into receiving marketing material will be contacted.
- For emails make sure you have put a subject in the 'Subject' box
- Adding suitable text into the reference field will allow you to identify your batch of recalls more easily in the recall history section of Blink
- Press 'Go

If you have chosen to print the recall as a letter, a print window will open where you can send the letter to your printer or create a PDF.

You would create a PDF if you are you are planning on using a third party company, such as Post Works, to print and post your letters.

If a print window doesn't open you will need to make sure that you have allowed 'pop ups' in your browser settings.

A window will appear telling you how many have been sent. If you are sending an email or text message you will need to make sure that the patients have an email address or a mobile number stored in their 'Patient Details'.

When running manual recalls, if a patient is included in an recall batch sent via; email but the patient does not have a stored email address, or SMS and they don't have a valid mobile number in Blink, then they will not be contacted and will NOT move on to the next recall stage – therefore you are advised to re-run the 'first recall' process and select and alternative sending method.

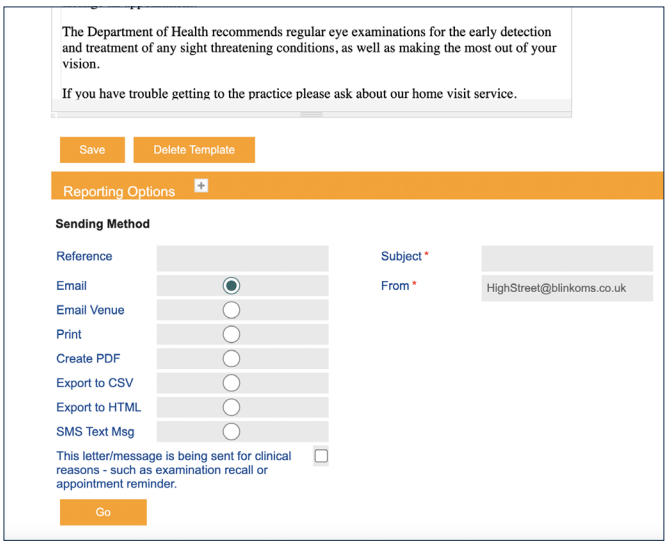
This is slightly different for Auto Recalls, see later.

Once a patient has been sent a 'First Recall' letter they will then move to the 'Second Recall' and so on.

We can help to set up templates for letters and emails if needed.

Sending Methods

You can send your messages in various ways including:



Email & Email Venue

- Please see separate section on email configuration to be clear which email address will be used to send your emails
- Email Venue is only applicable to domiciliary users, contacting a single email address about multiple patients

SMS

- Make sure you have a valid SMS account with our partner Faretext and it contains enough credits
- See the chapter on SMS Messages for help setting this up

Print

- Letters can be sent to your printer – ensure that ‘pop ups’ are NOT blocked by your browser before trying to send letters to a printer
- Most letters are best printed with margins set to ‘none’ in your printer settings
- You may also want to ensure that your printer does not auto add a header and footer to each letter (only applies if you have margins set)

Create PDF

- This is similar to Print, however, creates one or more pdfs which can then be uploaded to Postworks (ask about the Postworks service if you’d like the Blink team to manage this for you)
- Note the ‘create pdf’ method requires very specifically created templates – ask if you need help with this
- An alternative/better method to create pdfs is to select the Print option, and then use the ‘Save As PDF’ option in the printer settings

Export to CSV

- Use this method to create a pdf of all patients included in your recall list
- You do not necessarily need to select a template for this

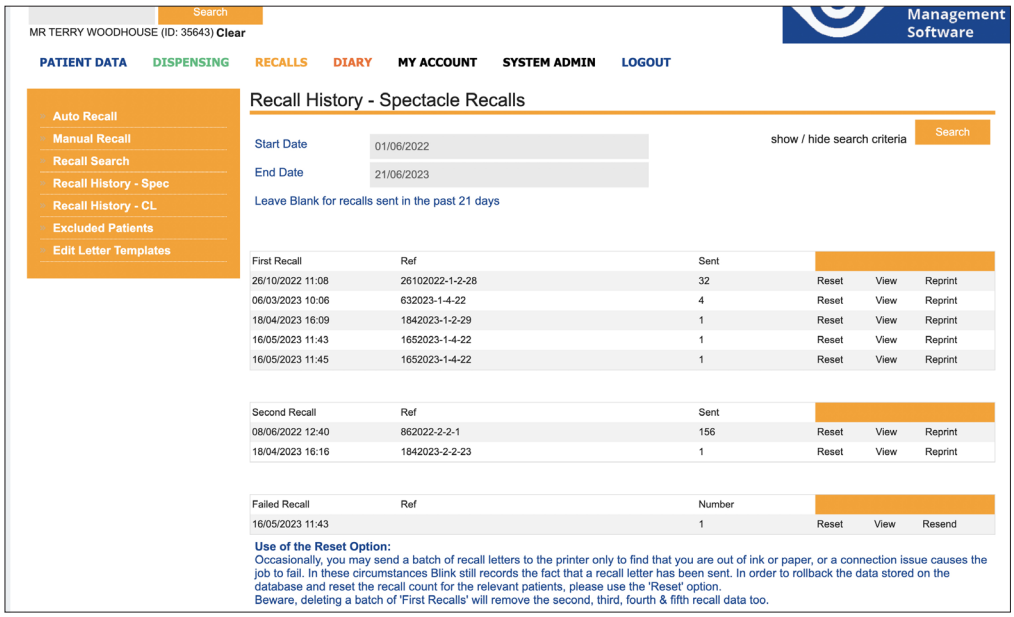
Recall History

When a recall has been sent it will show on the Recall History page. You can reprint the recall here and also reset the recall.

Use of the Reset Option:

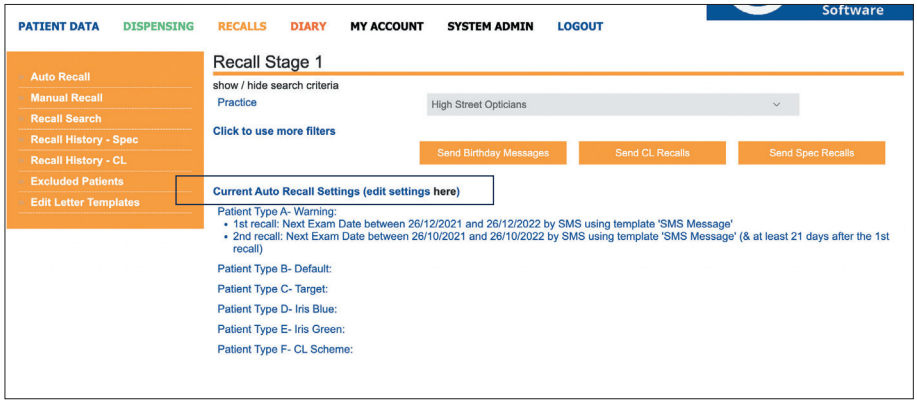
Occasionally, you may send a batch of recall letters to the printer only to find that you are out of ink or paper, or a connection issue causes the job to fail. In these circumstances Blink still records the fact that a recall letter has been sent. In order to roll-back the data stored on the database and reset the recall count for the relevant patients, please use the ‘Reset’ option.

Beware, deleting a batch of ‘First Recalls’ will remove the second, third, fourth & fifth recall data too.



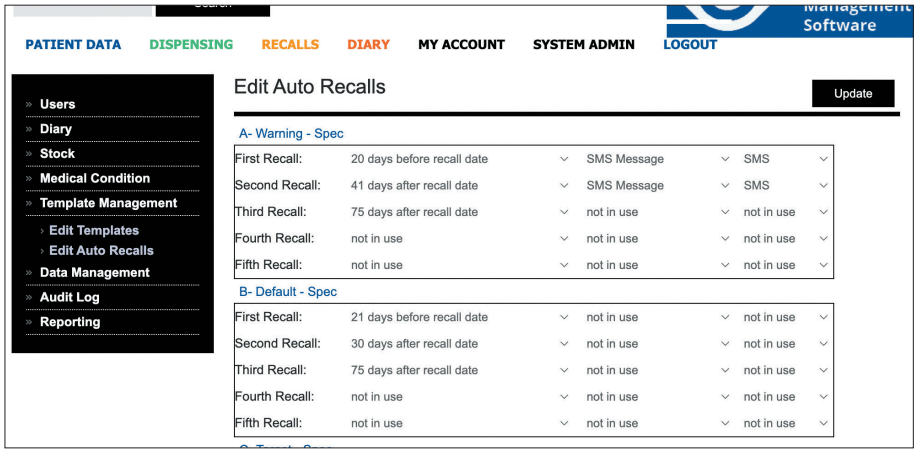
Auto Recall - Use to send examinations due reminders

You can set up auto recalls. Once set up it is a quick and easy way of sending appointment reminders. You simply have to go into Recalls - > Auto Recalls and press 'Send Spec Recalls' and the current batch will be automatically sent (similar for CL recalls).



To set up Auto Recalls go to:

- Recalls and select 'Auto Recalls'
- Click on 'Current Auto Recall Settings (edit settings **here**)', as shown above.
- This will take you to a page as per the image below
- Here you can set up the number of days before an eye test is due, that the recalls are sent and also the type of recall and the specific message template
- Once set up select 'Update'



Sending Auto Recalls

- Whenever you would like to send the auto recalls simply go to: *Recalls -> Auto Recalls* and press 'Send Spec Recalls'. All of the recalls will be sent
- You can check the sent recalls by going to *Recalls -> Recall History - Spec*

Auto Recalls rules:

When setting up auto recalls it is important to make sure that patient records are up to date and relevant for the type of message you would like to send. For example: make sure patients have an email address if sending the recall by email or a mobile number if sending an SMS text message.

- All patient types need to be set an action (even if they are not in use)

If sending method is "email" and email address is invalid or fails to send

- Blink will attempt to send an SMS instead (system needs to be configured to specify the template ID of the SMS message template)
- If no backup template is set up, then Blink will temporarily switch the method to CSV for this patient – this means that all valid messages will be sent but any invalid will be added to a CSV file and downloaded to the desktop (for processing offline or so you can update your records etc.)
- The patient is still marked as having been sent their recall, so that the next recall will be scheduled as planned

If sending method is "SMS" and mobile is invalid or fails to send

- Blink will temporarily switch the method to CSV for this patient – this means that all valid messages will be sent but any invalid will be added to a CSV file and downloaded to the desktop (for processing offline or so you can update your records etc.)
- The patient is still marked as having been sent their recall, so that the next recall will be scheduled as planned

Note: Auto recalls are designed to 'catch up' on missed recalls by including patients for the previous x days who may have not received their recall. This means that although you might run the auto recalls daily or weekly, it is not an issue if you only run monthly or less frequently.

If a patient is sent their 1st recall via this 'catch up' process but then immediately meets the 2nd recall criteria – they will not receive their 2nd recall until a minimum of y days has passed

X is set to 365 by default

Y is set to 21 by default

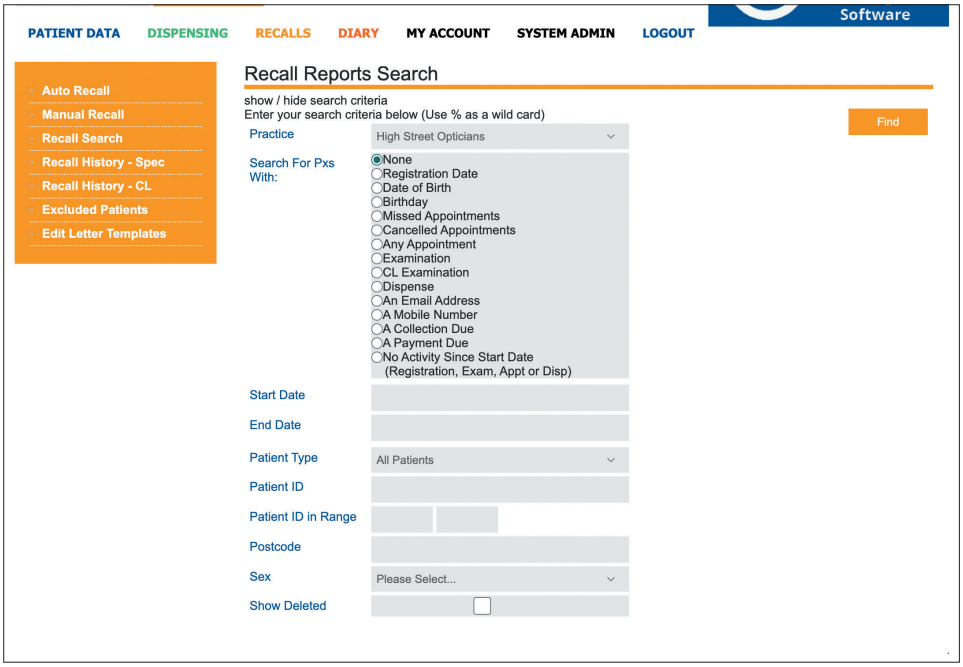
Recall Search

Use to send blanket mail shots or patient specific messages

Use recall search to send a mail shot letter to all patients on your system, or a specific message to a group of patients. By using recall search your recall history is not affected and appointment reminders are kept separate.

Sending mail shot letter to ALL patients on your system

- *Select Recalls -> Recalls Search*
- *Search for Pxs with -> Click None*, or if you know that you are sending an email or text message, it is a good idea to select this, then only patients with an email or mobile number in their records will be found
- Leave start and end dates empty and make sure ‘Patient Type’ is ‘All Patients’
- A maximum of 500 letters can be sent at one time, if there are more than this number of patients on your system it is a good idea send them in batches. Do this by first selecting male etc.



Select ‘Find’ and all patients on the system will be found (excluding any that have opted out of recalls)

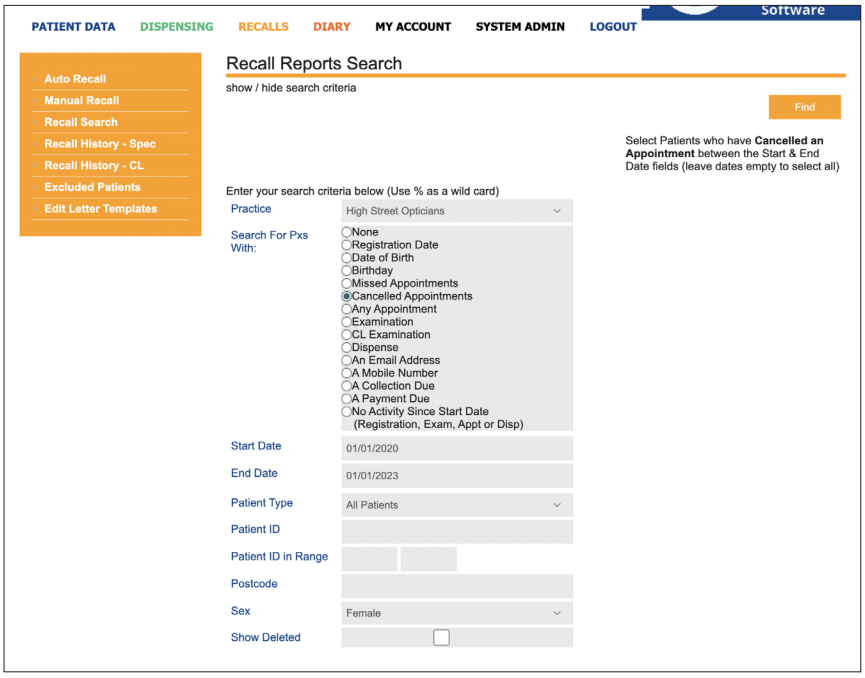
- At the top of the list in red will be the number of results found
- Select all (if you have more than 500 patients you will need to send the letters in batches. A good way of doing this is to send all male patients first, then female etc.)
- Select the Next button

This will take you to 'Recall Stage 2'. Here you can choose the relevant template and way to send the recall - either email, letter or SMS text message.

- Select template - from the drop down menu select the relevant template
- At the bottom of the page select the sending method
- Tick the 'clinical reasons' button
- Make sure you have put a subject in the 'Subject' box (for emails only)
- Press 'Go

Sending mail shot letter to a TARGETED GROUP of patients on your system

- *Select Recalls -> Recalls Search*
- *Search for Pxs with ->* This is where you can choose a targeted group of patients For example choose 'Cancelled Appointments' to send a targeted letter to everyone who has cancelled an appointment
- You could also use the date range fields to narrow the search down further
- A maximum of 500 letters can be sent at one time, if there are more than this number of patients on your system it is a good idea send them in batches. Do this by first selecting male etc.



Select 'Find' and all patients on the system will be found (excluding any that have opted out of recalls)

- At the top of the list in red will be the number of results found
- Select all (if you have more than 500 patients you will need to send the letters in batches. A good way of doing this is to send all male patients first, then female etc.)
- Select the Next button

This will take you to 'Recall Stage 2'. Here you can choose the relevant template and way to send the recall - either email, letter or SMS text message.

- Select template - from the drop down menu select the relevant template
- At the bottom of the page select the sending method
- Tick the 'clinical reasons' button
- Make sure you have put a subject in the 'Subject' box
- Press 'Go

Opting a patient opt out of promotional mailings or even recall letters

There are various ways of communication that a patient is able to opt out of.

- To change these settings, select the patient and go to *Patient Data -> Patient Information -> Lifestyle Notes*
- On the 'Lifestyle Notes' page towards the bottom of the page
- 'Are you happy to receive promotional communication?' The patient can choose Yes or No
- 'Are you happy to receive communication for the purposes of health care, including Recalls? The patient can choose Yes or No

Contact

If you need guidance regarding any aspect of Blink you can contact us on the support email, where we will always try to respond within 24 hours:

support@blinkoms.co.uk

Alternatively you can call us on the support line: 07748 500430

Or call the office phone: 0116 431 8284