

Recall Flowchart/Protocol

1. Identify team members

Who needs to be involved in each step? IT, contact, reviews, audit	Reception, HCA, pharmacist, care co-ordinator, nurse, GP, practice manager,	
What will they be doing?	Managing searches? Contacting patients? Carrying out reviews? Assessing the process?	
Do they need training? Any new IT being used?	Maybe? May need teaching about codes and recall process so they understand how the patients are identified?	
Who is the diabetes lead/overseeing the new programme?	GP or nurse	
Who isn't involved directly but needs to know? Practice meeting to update everyone?	Other GPs/nurses not doing reviews but can remind patients when to expect to be called?	
How to ensure everyone buys in?	Practice meeting? Ensure staff understand why changes are being made	
Any auxiliary staff/PCN who can help/be involved?	Any PCN staff who can be utilised?	

2. Identify eligible patients and divide recall into MoB format

What is the current recall format?	Random or process in place?	
How to create MoB Diabetes only? Include QoF requirements also? Is there anyone who should be excluded?	SWL ICB to create and send out based on practice needs.	
What code will it be searching for to identify the patients? What code will signal a review has been done? Should the search pick up outstanding patients/DNAs from last	What codes is current practice using? Who is responsible for this/when is it done (at the end of annual review)? How to avoid other reviews being mistakenly coded as this?	

month? What time frame will you accept for recent reviews?		
Who is going to run the search?	Reception? HCA? One person or multiple people? Blocked admin time to do it?	
What month will you start? How soon before this will you be recalling patients?	Just before QoF or mid year? Start 4 weeks before the next month (start of March for April MoB)	
What extra checking will be done in month one/two to ensure the process is working ok?	Manually go through some notes as a spot check? Who will do this?	

3. Making contact.

Method of contact?	Letter/text (accuRx)/call? Can this be done as a block message? Will the practice be communicating with all PwD in advance or only in their MoB?	
Prebooked slot or patient to arrange?	Book 1st appointment or both or patient to call in and book both? Protected clinic slots needed?	
Who will be doing this? Who will be following up to check patient's booking in/how often (weekly)?	Reception? HCA?	
How and who will remind patients to book in for the 2 nd /3 rd time? What method of contact?	Reception? HCA?	
What will be sent?	Invite letter explaining new MoB format, pre-questions/questionnaire?	
How will all staff know when the new programme is starting?	Practice meeting	

4. Test and Checks appointment

Who will be doing this?	HCA? Nurse?	
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When will this be?	Dedicated clinic or in mixed into normal clinic	
Will they see the phlebotomist first (or elsewhere)?	May need longer appt if bloods to also be done	
What will it involve/how long for (any variability between amount of work to be done or staff experience)?	Bloods and checks - feet, eyes, BP, discuss concerns, PIL. Is there a template? Use the YoC template?	
Who is making the follow up appointment? Is there a blocked clinic for this already?	HCA to book in the T+C appointment?	
How do patients want to get their results?	Where will this be documented? Will this be communicated back to reception?	
Time to discuss other lifestyle interventions?		

5. Communicating results to patients before next appointment

How will this be?	Letter or text or both?	
Who is going to do this?	HCA? Or reception?	
Is there a template document to automatically pull all the information together?	SWL ICB to create one	
How much information do you want to send?	Explanation of results, previous result, target for patient, meds, other lifestyle information?	
How will you ensure patients aren't contacted outside of this process by other staff for abnormal results?	Agree process with clinical staff? Results indication to be called 'T+C' when requested so all staff know follow up appointment booked?	

6. Annual review appointment

Who will be doing this?	Nurse/GP	
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When – will there be blocked clinics or adhoc booking?		
How long after T+C appt? Will there be a reminder text?		
What will be discussed? Will there be a template?	Interpreting results, medication changes (diabetes, cholesterol, BP) YoC template	
Will there be an action plan developed? How/when will this be given to the patient?	In appt or post/text later? SWL ICB to create sample	

7. Follow up missed patients, special groups?

How will this be done? Will they be recontacted in a few months?	Manually go through each search to find outstanding patients? Keep track on excel file?	
Care home/housebound patients, learning disability?	Separate process?	

8. Troubleshooting?

What will be the process for patients who's previous review is out of line with planned upcoming review (eg only 6 months ago but now is their MoB)?	Is there an allowable window either side of MoB?	
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9. Review of processes?

When will you get feedback from staff? And how?	Meeting after 2 months?	
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10. Future steps?