

Recall letters made easy with DRINFO SMART RECALLS and ePOST

What are “SMART” prioritised recalls?

SMART RECALLS™ is a fast and effective system applying a patented weighted formula to identify patients who most need your attention, so you can contact them as a priority.

SMART RECALLS™ then combines the selected recalls into a single letter and mails the letters to patients on your behalf – saving the practice time and money.

If the patient is overdue for a screening procedure, or eligible for an intervention or funded programme (such as the diabetes annual review or CVD risk assessment) DRINFO can summarise these ‘health checks’ into bullet points in the **SMART RECALL™** letter.

You have full control over which health checks are included in the letter and also which patients are posted a letter.

An electronic copy of the letter goes back into the patient inbox in your PMS, so your team always have a record of the letter in the patient record.

What are “ePost” single recalls?

ePOST™ offers you the ability to send single topic recall letters from the DRINFO system where you want to send a single topic recall letter to patients with more detailed information.

We can also add the list of ‘other reasons’ why the patient needs to visit the practice (as per SMART RECALLS™).

How are the letters and statements processed?

DRINFO™, in partnership with WESTERN MAILING, has created this service, called AUTOMAIL™. The letters are sent as an encrypted file from DRINFO through AutoMail™ to WESTERN MAILING.

The letters are then printed at WESTERN MAILING by automated machinery, inserted into envelopes by automated machinery and delivered to the patient by NZ Post.

Files received by 12 noon will be posted that afternoon, files received after 12 noon will be processed the following day.

Why did DRINFO™ partner with Western Mailing?

Western Mailing has been providing secure mailing services since 1984 and they process millions of envelopes every month.

Examples of clients that trust Western Mailing every day include: Vodafone, IAG New Zealand, Contact Energy, ACC, Public Trust, Telstra Clear, Westpac, Lumley, Air New Zealand and St Johns.

What does the SMART RECALL™ letter template look like?



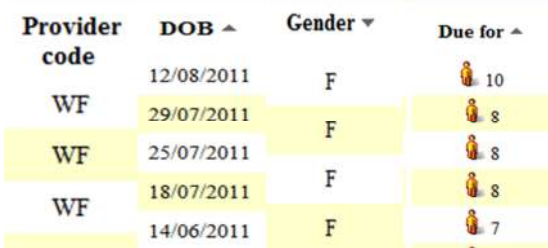
Below is the standard template, we can refine the paragraphs in the body of the letter as required.


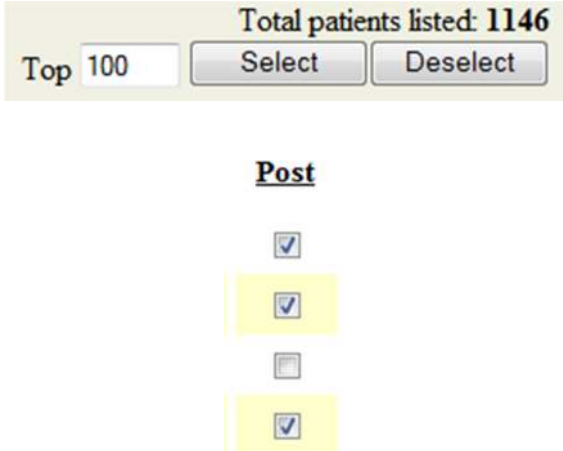
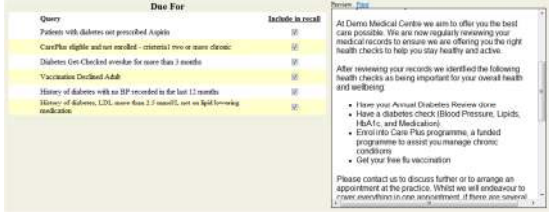




<p style="text-align: center;">Demo Medical Centre 349 Somewhere Road, Suburb, Auckland Phone: 09-777 7777 Fax: 09-333 3333 email: contact@demomedical.co.nz www.demomedical.co.nz</p> <p>Mrs Jena Smith 321 Special Road Some City 0892</p> <p>5/10/2011</p> <p>Dear Jena</p> <p>At Demo Medical Centre we aim to offer you the best care possible. We are now regularly reviewing your medical records to ensure we are offering you the right health checks to help you stay healthy and active.</p> <p>After reviewing your records we have identified the following health checks as being important for your overall health and wellbeing:</p> <ul style="list-style-type: none">• Re-enrolment in the medical centre to reduce the cost of seeing a doctor by ensuring that you continue to receive a government subsidy when you visit us• Enrol you into the free diabetes annual review programme• Have a Healthy Heart Check (Blood Pressure, Lipids, and Medication)• Have a diabetes check (Blood Pressure, Lipids, HbA1c, and Medication)• Assessment of heart disease risk• Get your free flu vaccination <p>Please contact us to discuss further or to arrange an appointment at the practice.</p> <p>If there are several items to discuss, you may require an extended appointment time or need more than one visit.</p> <p>If you have recently had any of these health checks, here or elsewhere, please let us know so we can update your medical records.</p> <p>Kind regards</p> <p>Practice Nurses and Doctors Demo Medical Centre</p> <p>P.S. Please remember to bring this letter with you to your appointment.</p>


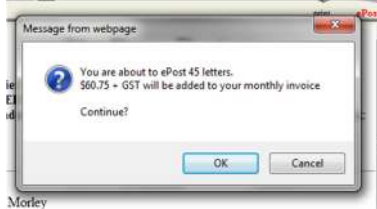
How do I send SMART RECALL™ letters from DRINFO?

(weighted, prioritised and patient centric multiple topic recalls)





Topic	Image	Notes
1. Go to SMART RECALLS in your DRINFO audit report		From any page of the DRINFO audit, click on the SMART RECALL icon at the top of the left side tool bar
2. Select patient list for recall		Firstly select which group of patients you want to contact (SELECT RECALL).
3. Select what to include in their letter		Then select what items you would like included in the letters to these patients – if relevant for that person (INCLUDE IN LETTER)
4. Click NEXT		
5. Optional: Determine what variable to rank the order of priority contact	 <p>The default order to present the patient list is by potential \$ revenue to practice</p>	<p>The SMART RECALL list of patients will be generated and prioritised by:</p> <ul style="list-style-type: none"> • High needs (M,P,Q5) • Clinical need • Number of procedures
6. Optional: Re-order the priority order of the patient lists according to the variable you require		<p>The patient list can be re-ordered by any of the column headers. Eg: by PROVIDER code by Date Of Birth (age) by GENDER by items due for</p>

<p>7. Optional: Apply any FILTER(s) if you want to select a sub set of patients</p>	 <p>Apply filters (or 'unfilter' to remove all filters)</p>	<p>Available filters:</p> <ul style="list-style-type: none"> • High needs only • Maori only • Age ranges • Funded patient only • New this month • No sent mail
<p>8. Once you have selected the patient list to SMART RECALL, select the number of patients you wish to mail today</p>		<p>Either select the top (number eg: 100)</p> <p>Manually tick / Untick individual patients</p> <p>Deselect selected all patients at any time</p>
<p>9. Optional: You can pre-view and edit the content of individual letters</p>		<p>To remove an item from the bullet point list in the letter, un-tick that item from the 'due for list' for that patient only.</p>
<p>10. When ready to send the letters, click on the envelope icon on the top tool bar</p>		<p>This takes you a screen where you have the option to preview all the letters before they are sent.</p>
<p>11. Option to preview letters 1-by-1</p>		<p>Click to view and use the arrows to scroll through each letter</p> <div data-bbox="1102 1906 1374 1951">  Page 1 of 5  </div>

12. ePost your letters!		When you are ready, click on the ePOST envelope and all the letters will be mailed without you having to print and fold them in the practice!
Notification		A message box will pop up to confirm how many letters and how much you will be invoiced. Click OK
<p>Sent by 12 noon – picked up by NZ Post the same day</p> <p>Sent after 12 noon – picked up by NZ Post next day</p>	<p>A copy of letter will be electronically sent to the patient inbox in your PMS</p> <p>NB: Set up a provider called DRINFO</p>	As long as your DRINFO inbox is set up, an electronic copy of the letter will be sent to the patients inbox


What are the options for re-ordering the SMART RECALL priorities?

The patient lists in SMART RECALLS™ are displayed in priority order. The default is that the patient list is ranked by the potential \$ that the patient could bring to the practice. You can select other ways to prioritise your list of SMART RECALL™ patients.

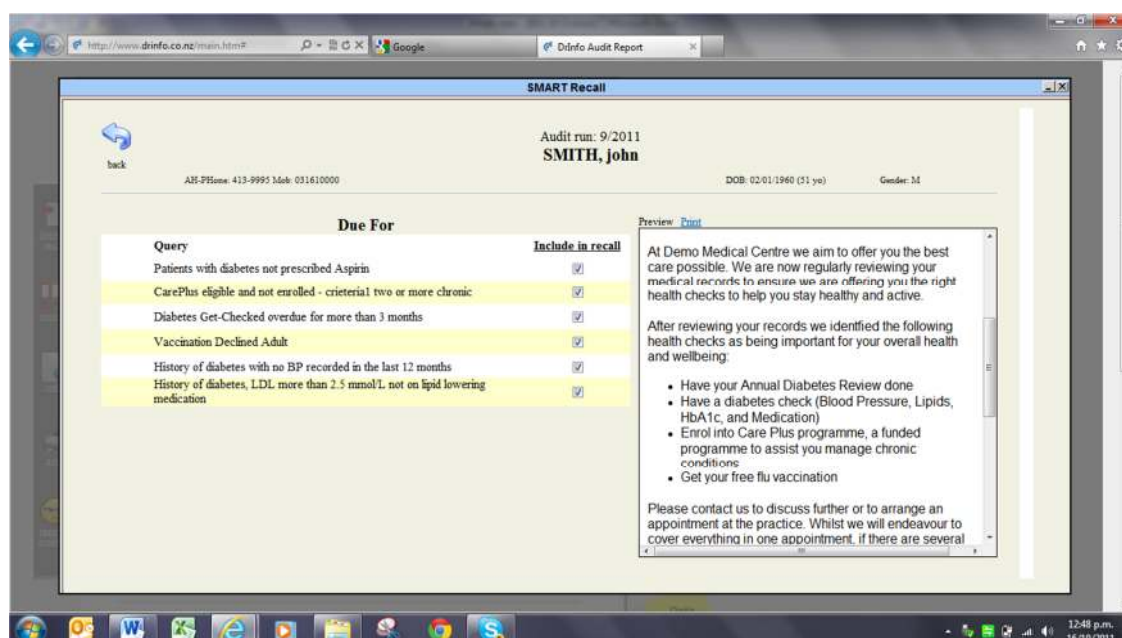
Column header	Description of 'order display' and how to activate
NAME	Display patient list ordered alphabetically by surname Click on the Name header at top of column to sort patient list by A-Z, or Z-A order
NHI	Display patient list ordered by NHI Click on the NHI header at top of column to sort patient list by ascending, or descending order for NHI number order
PROVIDER CODE	Display patient list in order By Provider or, filtered for One Provider only Click on the Provider code header, or the provider initials in patient list To deselect click on the unfilter icon
DOB	Display patient list ordered by Date of Birth Click on the DOB header at top of column to sort patient list by ascending, or descending ordered by DOB (age) of patient
GENDER	Display patient list ordered by gender, or filtered for MALE or FEMALE only Click on the Gender header at top of column for showing FEMALE , MALE and UNKNOWN genders in a block. Click on M , F , or U in the patient list to display single gender only
DATE LAST SEEN	Display patient list ordered by date Last Seen (i.e. date last invoiced, will recognise zero invoices) Click on Last seen header at top of column to sort patient list by ascending or descending order of when the patient was last invoiced
POTENTIAL REVENUE	Display patient list ordered by Potential Revenue for the practice by patient Click on the Potential Revenue header at top of column for ascending or descending order of the approximate potential revenue the patient could bring to the practice via funded programmes or initiatives
ESTIMATED TIME REQUIRED	Display patient list ordered by Estimated Time Required Click on the Estimated Time Required header at top of column to sort patient list by ascending, or descending, order of estimated time required to action all the items indicated in the 'Due for' list for each patient
DUE FOR 	Display patient list ordered by the number of items the patient is due for , or require review (i.e. the number of times a patient appears on a list in the DRINFO audit)
POST and 	You can now view who has been posted a SMART RECALL letter in the current month. New filter – No mail sent (in current month.)

How do I view and edit individual SMART RECALL™ letters?

If you want to view an individual patient letter, rather than a whole mail merge batch, you can do so by clicking the ‘Due for’ icon:


Icon	Description
	Now by clicking on the ‘Due for icon’ you can view not only the list of due for items (i.e. queries where the patient name appears in the DRINFO audit report) but you can also view the letter that could be automatically sent to the patient. If you do not want to include any items in the letter, just un-tick the items from the ‘Due for’ list and the letter will refresh to remove them from the bullet point list.

You can also remove any of the bullet points listed from individual patient letters by un-ticking “include in letter”:



Can I print the SMART RECALL letters on our practice printer?

YES you can print individual patient letters in the practice from the screen above.

	<p>Click on PRINT just above the preview of the letter.</p> <p>NB: Only if sending electronically via the ePOST icon will a copy of the letter be sent electronically to the patient PMS record.</p> <p>If you are printing the letter at the practice, no electronic copy of the letter will be viewable in the PMS.</p>
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How do I send ePost™ single recall letters?



Topic	Image	Notes
Select patient list		Open the list of patients
Select individual patients		Tick 'post' for patients you want to ePost™ a letter to
Merge the selected names with the letter template	 ePost	Click on ePOST™ To merge the names with the letter template
View the letters		Click on to view each letter
ePost		Click ePost™ to post selected letters ePost
By 12 noon – NZ Post same day After 12 noon – NZ Post next day	Copy sent to PMS inbox	As long as a provider called DRINFO is set up, an electronic copy of the letter will be sent to the patients inbox

How do we see, in the DRINFO patient list, when a letter has been posted this month?

When a letter has been sent using **SMART RECALLS™** or **ePOST™** from within DRINFO, the tick box will be replaced by the words '**letter posted**' under the **Post** column. This applies to letters posted from the current month DRINFO audit report.



How do we see, in our PMS, the content of a letter that has been posted from DRINFO via SMART RECALLS™ or ePOST™ single recalls?

As long as you have set up a **PROVIDER** called **DRINFO** set up in your PMS, an electronic copy of all the letters sent to patients via SMART RECALLS™ or ePOST™ will be sent to the **patient inbox** in your PMS.

Can we use our own template letters?

Yes. Just send us a copy of the letters that you would like loaded as templates and we will set them up in your DRINFO system.

Does DRINFO have standard letters?

Yes. DRINFO has standard letter templates and you are welcome to edit them to suit your needs.

How does your practice get started with SMART RECALLS™ and ePOST™?

Get started in 3 simple steps:

1. **LETTERHEAD REQUEST** – details of your letterhead set up.

Email or fax to DRINFO. If you would like us to load your current recall letters to DRINFO so you can send them via ePOST, please provide us with copies (or ask us for the DRINFO template)

2. **SET UP DRINFO as a PROVIDER** - Set up a PROVIDER called DRINFO in your Practice Management System

Set up a **PROVIDER** in your PMS called **DRINFO** so that electronic copies of the letters sent via SMART RECALLS™, ePOST™ will be sent to the **patient inbox**.

Please contact rob@drinfo if you would like help to do this.

3. **CONFIRMATION** - **DRINFO** will then be in contact with you to confirm you are ready to go.

We will also offer to help you through your first automated mailing.

Request to set up your practice letterhead in DRINFO – for sending SMART RECALL™ and ePOST™ single recall letters

Practice details:

Practice name	
Street address	
Phone number	
Fax number	
Email	
Website	

Set up for receiving electronic copy of letters sent back into the patient inbox of your PMS:

EDI	
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Contact person:

	Practice Manager contact	Nurse / Clinical Assistant contact
Names		
Email addresses		

Do you use a Terminal Server or Citrix environment? (If unsure please refer to your IT support person)	YES / NO
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Fax: (09) 441 9355

Or post: DRINFO LLC, M287 Private Bag 300987, Albany, Auckland 0752

How much does the automated mailing service cost?

There is no set up fee to start using SMART RECALLS™, ePOST™ single recalls, or AUTOMAIL printer for statements.

You only pay for the letters as you send them at a cost of **\$1.35 + GST** for a single page and an additional **15 cents + GST** for extra pages in the same envelope.

This includes – paper, printing, envelope, postage and Of most impact to the practice ... time.

How do we pay for the letters sent?

A monthly invoice will be sent to you.

You can also view your account balance via your on-line AUTOMAIL™ account at any time, as well as view an archive of all letters posted.

What is “AutoMail™” printer for statements?

AUTOMAIL™ printer allows you to use the same technology as SMART RECALLS™ and ePOST™ for documents but outside the DRINFO audit system. For example statements posted directly from your PMS. Using AutoMail™ for statements gives you the flexibility to:

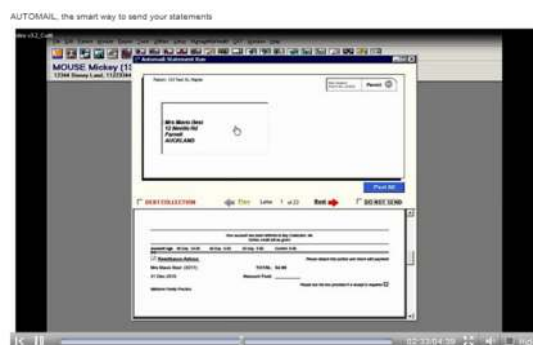
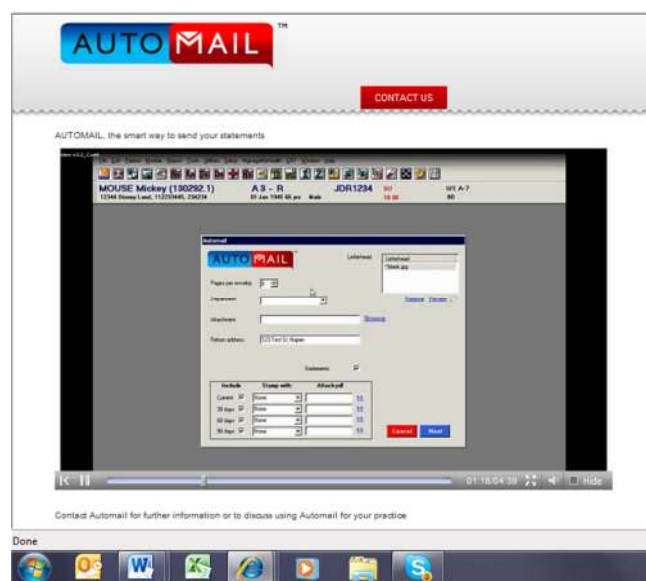
- Send only 30, 60 or 90 days statements
- ‘Do not send’ individual patient statements
- Include a newsletter with all statements, or include separate letters with overdue accounts
- Add stamps such as ‘Final demand’ or ‘Friendly reminder’

How do I use AutoMail™ to send our statements?



View this 4 minute video and see how you could save hours of your administration team time. What else could they be doing?

<http://www.epost-automail.co.nz/downloads/automail.asp>



www.automail.co.nz

Archive record available through the AutoMail™ customer portal where you can track & search all statements and attached newsletters or letters that have been sent



How does your practice get started with AUTOMAIL™ printer?

Get started in 3 simple steps:

1. REQUEST: Complete the 'Request for AUTOMAIL™ installation' form

Email or fax to DRINFO. (Fax number is on the bottom of the form).

2. INSTALL: DRINFO will then contact you to arrange a time for the AUTOMAIL™ installation (done via remote access over the phone)

Someone from the DRINFO technical team will phone you and arrange to install the AUTOMAIL™ printer remotely – please allow about 30 minutes for this.

DRINFO will take you through a trial statement run.

We will also confirm your user name and password for your AutoMail™ on-line tracking account www.automail.co.nz

You can then practice sending statements using the features in AUTOMAIL™ as your account will not be 'activated' until you complete the AUTOMAIL™ account application form.

3. ACTIVATE: Complete AUTOMAIL™ account application form to activate your account

For your account to be activated you need to complete the AutoMail account application form and fax back to Western Mailing.

When you are ready to send your first statement run via AUTOMAIL™, please return the AUTOMAIL™ account application form to WESTERN MAILING (fax number on the bottom of the form).

Someone from Western Mailing will then be in contact to welcome you to the service.

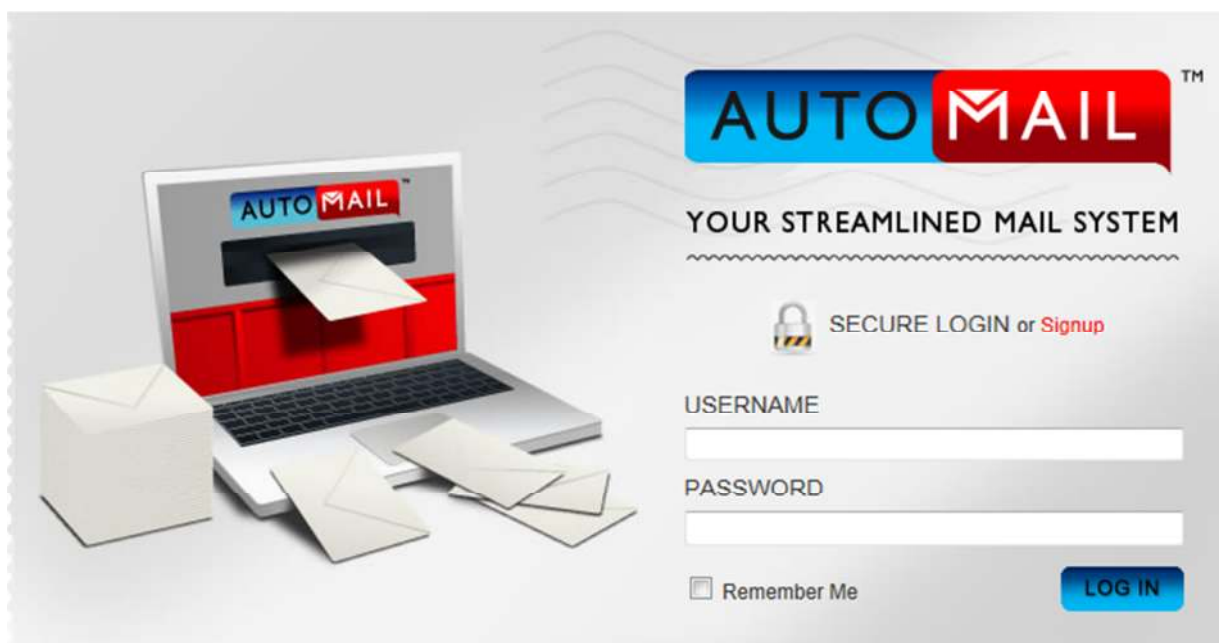
How do we track how many statements we have sent each month?

Once your AutoMail™ account has been activated with Western Mailing, DRINFO will then create an on-line AutoMail™ account for you so you can track all statements sent from your practice. We will notify you when this has been done.



www.automail.co.nz

You can access your account via the **LOG IN CUSTOMER PORTAL** using the email address you provide on the AutoMail account Form and password.



The image shows the AutoMail login portal. On the left is a 3D illustration of a laptop with the AutoMail logo on its screen, a stack of envelopes, and a printer printing an envelope. On the right is the login form. At the top right is the 'AUTO MAIL' logo with a trademark symbol. Below it is the text 'YOUR STREAMLINED MAIL SYSTEM' followed by a wavy line. Underneath is a padlock icon and the text 'SECURE LOGIN or Signup'. There are two input fields: 'USERNAME' and 'PASSWORD'. Below the password field is a checkbox labeled 'Remember Me'. At the bottom right is a blue 'LOG IN' button.

Once you have logged in, click on the 'VIEW ARCHIVED MAILOUTS' button to see all the letters sent from your practice within the date timeframe you select.



ARCHIVE

Letters sent **in the last month** ▼

List

Search

Date Sent	Batch Number	Send to	Return Address	Content
21/10/2011 12:11:45 p.m.	4KE03246jicv121144	WINDOW	Your practice return address shows here	VIEW
21/10/2011 12:04:45 p.m.	7S58757ar6L2120445	WINDOW	Your practice return address shows here	VIEW
21/10/2011 12:03:47 p.m.	1b7F0v13996i120346	WINDOW	Your practice return address shows here	VIEW

Letters sent

You can list and view the letters sent:

- In the last 24 hours
- In the last week
- In the last month
- In the last 60 days
- In the last 6 months
- In the last year
- All
- By date from to (enter dates)

Search

You can also search for a patient name or any text within the letters.

View letter content

Click on the **VIEW** icon to open the letter and view what was sent.



Your AutoMail™ account is your secure back up storage archive
So you can track, monitor and easily view the statements sent by your practice team.
Remember a copy of the letter will also be sent to the patient inbox in your PMS.

Request to install AUTOMAIL™ printer

Practice details:

Practice name	
Street address	
Phone number	
Fax number	
EDI	

Contact person:

Name	
Position	
Email address	

AUTOMAIL™ printer will be installed on one PC initially:

How many PC's are you likely to want to have AUTOMAIL™ printer installed on in the future?	
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Set up for AutoMail™ account log in:

USER NAME	Will be the email address of the contact person unless otherwise specified:
PASSWORD	Please chose at least 6 characters:

IT set up:

Do you use a Terminal Server or Citrix environment? (If unsure please refer to your IT support person)	YES / NO
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Best days and time to contact me:

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Please return this form to DRINFO via fax, email or post.

DRINFO will then be in contact soon.

Fax: (09) 441 9355

Or post: DRINFO LLC, M287 Private Bag 300987, Albany, Auckland 0752

Or email: rob@drinfo.co.nz

Account Application Form



CUSTOMER DETAILS

IRD GST NUMBER

FULL LEGAL NAME

TRADING NAME

POSTAL ADDRESS

PHYSICAL ADDRESS

PRIMARY CONTACT

EMAIL

BUSINESS OWNER

EMAIL

PHONE

FAX

MOBILE

CUSTOMER SETUP

PLEASE USE THIS EMAIL ADDRESS FOR OUR ACCOUNT

EMAIL

CREDIT DETAILS

MAXIMUM CREDIT REQUESTED

\$

TYPE OF BUSINESS

YEARS UNDER PRESENT OWNERSHIP

A/C PAYABLE CONTACT

DATE ESTABLISHED

DETAILS OF DIRECTOR(S) / PARTNER(S) / OWNER

NAME

EMAIL

PHONE

NAME

EMAIL

PHONE

TRADE REFERENCES

NAME

CONTACT

PHONE

NAME

CONTACT

PHONE

NAME

CONTACT

PHONE

Privacy Act 1993

I/We authorise any person or company to provide you with such information as you may require in response to your credit request. I/We acknowledge that information collected by you has been collected to assess the application, and will be held by securely Auto mail Ltd at it's offices in Avondale. It is intended in the accordance with the authorisation above, we may furnish details of information to third parties, who for the purpose of our assessment of your credit application and any ongoing dealings are required to comment upon that information.

DECLARATION

I hereby declare the above information to be correct and that I have read and understood the Terms and Conditions. I sign below as a duly authorised person or officer.

SIGNED

WITNESS

NAME

NAME

TITLE

TITLE

DATE

DATE

GUARANTEE AND INDEMNITY IN CONSIDERATION OF CREDIT BEING EXTENDED TO:

(customer)

The Customer at the request of the undersigned ("the Guarantor") (as hereby admitted) the Customer and Guarantor are jointly and severally liable for payment of all monies from time to time owing by the Customer to the Company and or the due and punctual performance of all Terms and Conditions set out in the reverse of this form. The liability of the Guarantor shall be as principal and this guarantee shall not be prejudiced affected or released by the release or insolvency of the Customer, the unenforceability of any other security, delay, other indulgence of variation of terms of trading or any other factor whereby sureties or guarantors may be prejudiced, affected or released.

This guarantee shall be continuing guarantee with effect that the liability of the Guarantor shall not cease until all monies owed by the Customer to the Company have been paid and all Terms and Conditions performed.

As a separate and additional obligation the Guarantor hereby agrees to indemnify and hold harmless the Company against all losses, costs, liabilities and actions suffered or incurred as a consequence of the Customers default in payment to the Company or observance of the Terms and Conditions set on the reverse page.

All the monies payable by the Guarantor under this Guarantee and Indemnity shall be payable immediately upon demand made in writing to the Guarantor.

GUARANTOR

NAME

DATE

PHONE 09 829 0800

FAX 09 829 0850

service@automail.co.nz