

Step-by-Step Guide Implementing Planned Recall



Each step outlined below is described in more detail in the module.

Click the video icon to hear what other BC physicians have to say about implementing planned recall. The video can also be downloaded from www.practicesupport.bc.ca.

Stage 1 Plan

Assess your needs.

- See the Practice Profile section in the [In-Depth Practice Self-Assessment Questionnaire](#).

Create an action plan.

- See the completed [Sample Action Plan](#) included in the [Resources](#) section of this guide.
- For detailed steps, see the [Create an Action Plan Tips](#) on the Implementing Planned Recall page at www.practicesupport.bc.ca. Blank action plan forms are also available there.

Stage 2 Do

Select the condition and patients.

- Test and streamline a planned recall system by starting with a particular condition.

Establish a recall process.

Generate a recall report.

Carry out patient recall.

Improve the efficiency of your recall system.

Generate follow-up Recall Reports.

Stage 3 Study

Assess patient care and management and clinical progress.

Assess patient and staff satisfaction.

Complete the [Implementing Planned Recall Self-Evaluation Form](#) in the [Resources](#) section of this guide.

Report and share your results.

Stage 4 **Act**

Rerun the cycle to refine it, or make it more complex.

Expand planned recall to other patients.

Sustain planned recall by making permanent the system and procedures required to maintain it.

Consider other strategies.

- See the [Enabling Patient Self-Management](#) and [Introducing Group Visits](#) Practice Guides.