Care Plan Item: Recall Schedule

Last Modified on 07/28/2021 10:49 am EDT

Version 14.19

Path: Clinical tab > Care Plans

About

The Care Plan Items tab allows you to indicate whether the items added into the system are an Action, Trigger, or both for the Care Plans being created. You are also able to set the default interval in which the items are recalled for a patient as well as a Recall Schedule if the particular item would be recalled over an extended period of time.

Setting a Recall Schedule

1. Open the **Manage Care Plans** window by following the path above.
2. Click the **Care Plan Items** tab. Here, you'll see all items that can be associated with a Care Plan.
3. Click to select the **Item** you would like to set a Recall Schedule for.
4. The **Default Interval** is what the Care Plan Item defaults to when added to a Care Plan. Edit the **Default Interval** if it differs for your Practice. If no additional Recall Schedule is set, the Item will recall as per the default interval for all enrolled patients.
5. At the bottom of the screen for each highlighted item, a Recall Schedule can be set by clicking in the area to add a new rule for recall.

Recall Schedule for selected item			
Begin Age (months) △	Interval (months)	Recurrence Rule	Associated Item Name
Click here to add a new rule to the recall schedule			

6. Enter in the **Age** in months for when you would like the recall to begin.
7. Enter the **Interval** in months to have the item recalled.
8. Select a **Recurrence Rule** from the drop-down menu.

> 📌 **Note**: Select an **Associated Item** to utilize the same Recall Schedule. Otherwise, leave the field blank.

Recurrence Rule	How it works with the Care Plan
Display only, no recall needed	Displays the Care Plan Item but does not recall it.
Recall Per interval as of begin-at age	Recall set according to the interval listed beginning at the age in months indicated.
Once after begin at age	Recall the care plan item one time after the age in months indicated.
Suppress display after begin-at age	After the age indicated, no longer display the care plan item.
Same schedule as associated item	Replicate the schedule of another associated Care Plan Item.

9. Repeat as necessary using the **Add** button ➕ .
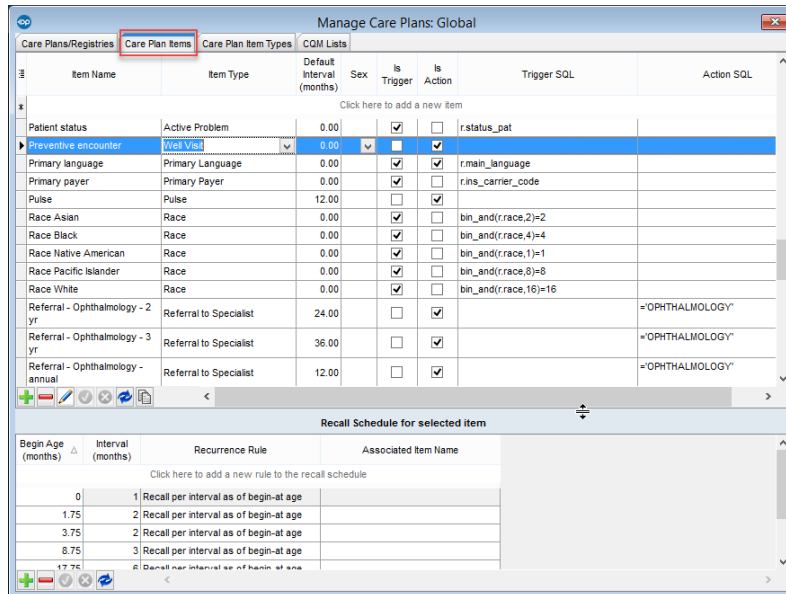10. Click the **Save** button ✔ to save changes.

Version 14.10

Utilities > Manage Clinical Features > Care Plans

Overview

The **Care Plan Items** tab allows you to indicate whether the items added into the system are an action, trigger, or both for the Care Plans being created. You are also able to set the default interval in which the items are recalled for a patient as well as a recall schedule if the particular item would be recalled over an extended period of time.
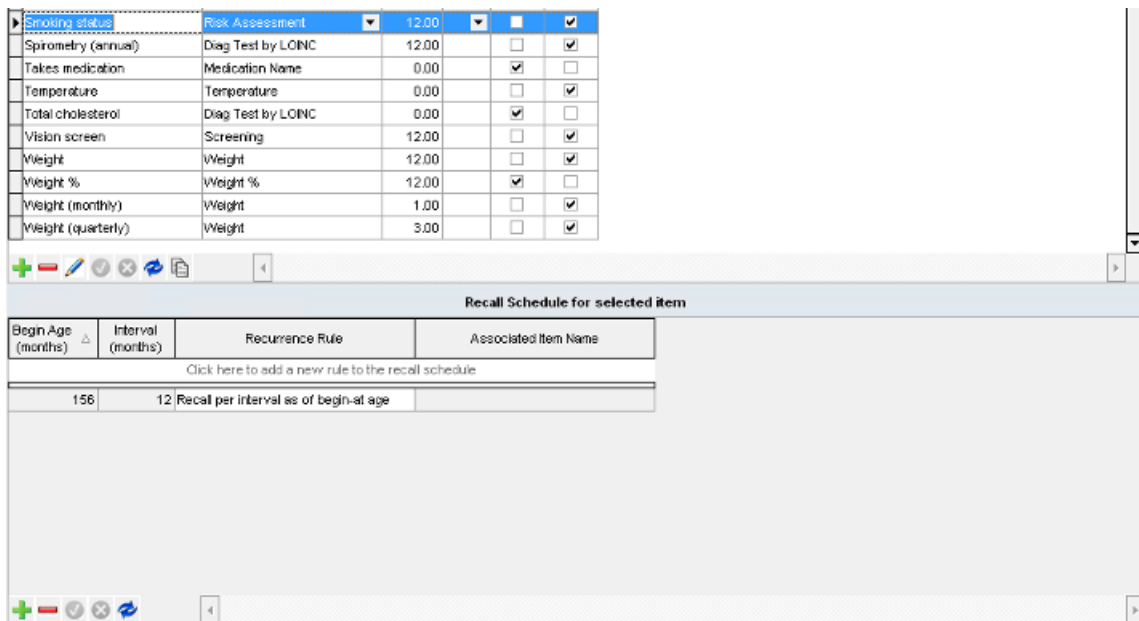
Setting a Recall Schedule

1. Open the Manage Care Plans window.
2. Click on the **Care Plan Items** tab, which will then display all items that can be associated with a Care Plan.

3. Click to highlight the item you would like to set a recall schedule for.

4. The default interval is what the Care Plan Item defaults to when added to a Care Plan, type to change the default interval if it differs for your practice. If no additional recall schedule is set, the item will recall as per the default internal for all enrolled patients.

Default Interval (months)
6.00
12.00
12.00
12.00
3.00
0.00
0.00
1.00
12.00
0.00

5. At the bottom of the screen for each highlighted item, a recall schedule can be set by clicking in the area to add a new rule for recall.

Recall Schedule for selected item

Begin Age (months) △	Interval (months)	Recurrence Rule	Associated Item Name
Click here to add a new rule to the recall schedule			

6. *Type* in the age in months for when you would like the recall to begin.
7. *Type* in the interval in months to have the item recalled.
8. Use the *dropdown* to pick a recurrence rule:

⚠ **Note**: You only need to choose an associated item if you wish to utilize the same recall schedule, otherwise that field can be left blank.

Recurrence Rule	How it works with the Care Plan
Display only, no recall needed	Displays the Care Plan Item but does not recall it.
Recall Per interval as of begin-at age	Recall set according to the interval listed beginning at the age in months indicated.
Once after begin at age	Recall the care plan item one time after the age in months indicated.
Suppress display after begin-at age	After the age indicated, no longer display the care plan item.
Same schedule as associated item	Replicate the schedule of another associated Care Plan Item.

9. Repeat as necessary using the **Insert Record** button ➕ .
10. Use the **Post Edit** button ✅ to save changes.

An example of a completed recall schedule:

Preventive encounter	Well Visit	0.00	▼	■	☑
Pulse	Pulse	12.00		☐	☑
Sex	Sex	0.00		☑	☐
Smoking status	Risk Assessment	12.00		☐	☑
Spirometry (annual)	Diag Test by LOINC	12.00		☐	☑
Takes medication	Medication Name	0.00		☑	☐
Temperature	Temperature	0.00		☐	☑
Total cholesterol	Diag Test by LOINC	0.00		☑	☐
Vision screen	Screening	12.00		☐	☑
Weight	Weight %	12.00		☐	☑
Weight %	Weight %	12.00		☑	☐
Weight (monthly)	Weight	1.00		☐	☑
Weight (quarterly)	Weight	3.00		☐	☑

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Recall Schedule for selected item

Begin Age (months) △	Interval (months)	Recurrence Rule	Associated Item Name
		Click here to add a new rule to the recall schedule	
0	1	Recall per interval as of begin-at age	
1.75	2	Recall per interval as of begin-at age	
3.75	12	Recall per interval as of begin-at age	
8.75	3	Recall per interval as of begin-at age	
23.75	6	Recall per interval as of begin-at age	

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