

Demographic Analysis and Recall (DAR) Send Messages for Recall

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Path: Practice Management tab > Demographic Analysis/Recall > Send Messages

About


Prior to sending messages from the Demographic Analysis/Recall report, you will need to create a Patient Demographics List or a Recall report. Messages can be sent from the following tabs: **Patient Demographics**, **Clinical Recall**, **Care Plan Recall**, and **Vaccine Status Recall**. You must make sure that each patient is enabled to receive Recall messages per their setup in **Clinical**, **Practice Management**, or **Billing tab > Patient Chart button > Family Contacts > Preferred Contact Method section > Recalls**. A **detailed video** demonstrating this workflow can be found below.

Summary of Steps

Follow the steps below to send Messages after building your Patient Demographics List or running the appropriate Recall report.

1. In the Demographic Analysis/Recall Report window, click the **Send Messages** button. The Patient Message eXchange window is displayed.
2. In the Patient eXchange window, use the drop-down arrow in the Search box to select the message to send out.
3. Click the **Sort Groups** button.
4. Click the **Create Msgs** button. A window is displayed showing you the number of credits that will be used.

Detailed Video

 **Tip:** To enlarge the video, double-click it, or click the **Fullscreen** button