

Demographic Analysis and Recall: Create a Patient Demographics List

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Version 14.19

Path: Practice Management tab > Demographic/Analysis Recall > Patient Demographics tab

About

The Patient Demographics Report can be run on its own for the purpose of identifying a list of patients with a particular insurance or birthday month. It must, however, be run prior to continuing on to run the Clinical Recall, Care Plan Recall, and Vaccine Status Recall reports. It does not need to be run prior to running the Vaccines Given reports. A [detailed video](#) demonstrating this workflow can be found below.

Summary of Steps

1. Navigate to the **Patient Demographics** tab of the Demographic Analysis/Recall Report by following the path above.
2. Make a selection from the **Visit Dates** options.
3. Select one or more options to determine **which patients to include**: active only, patients with future appointments, or to exclude patients with appointments.
4. Click the **Search** button.
5. *(Optional)* Add or remove columns from the grid using the **Show/Hide Visible columns** button.
6. *(Optional)* **Sort, filter, or group** the data.
7. Take action using the **Print Letters, Send Messages, or Export** buttons. Or, proceed to the appropriate Recall tab to run recalls for the patients in the grid.

Detailed Video

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