Demographic Analysis and Recall: Run a Clinical Recall Report

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Version 14.19

> **Path: Practice Management tab > Demographic/Analysis Recall > Clinical Recall tab**

About

Prior to running the Clinical Recall Report, you will first need to create a **Patient Demographics List**. The Clinical Recall Report displays a list of patients and/or recalls by using the following search criteria. **Detailed videos** demonstrating the workflow for running Clinical Recalls are found below.

Summary of Steps

Follow the steps below to run a Clinical Recall Report after building your Patient Demographics List:

1. Navigate to the **Clinical Recall** tab of the Demographic Analysis/Recall Report by following the path above.
2. Enter a **Date Range**, if not entered during the creation of the Patient Demographics List. The range entered determines the selections in the Problems, Med Allergies, Medications, and Lab Results drop-downs.
3. Select the Problem, Med Allergy, Medication, and/or Lab Results checkboxes.

> 📌 **Notes**:
> - **Problem Recalls**: A patient must meet specified criteria before being added to the Demographic Analysis and Recall diagnosis (Problem) recall report. See **Diagnosis Recall Criteria** for more information.
> - **Lab Result Recalls**: Up to three different lab tests (or the same test from three different labs) can be included. Use the **and/or** radio buttons, as appropriate. You can also display just patients with "high" or "low" results utilizing the **L** or **H** checkboxes.

4. Use the corresponding drop-down(s) for the selection(s) in the step above to further build your report criteria.
5. *(Optional)* Select the checkbox to include problems and medication allergies in "Tracking" status.
6. Click the **Search** button.
7. *(Optional)* Add or remove columns from the grid using the **Show/Hide Visible columns** button.
8. *(Optional)* **Sort**, **filter**, or **group** the data.
9. Take action using the **Print Letters**, **Send Messages,** or **Export** buttons.
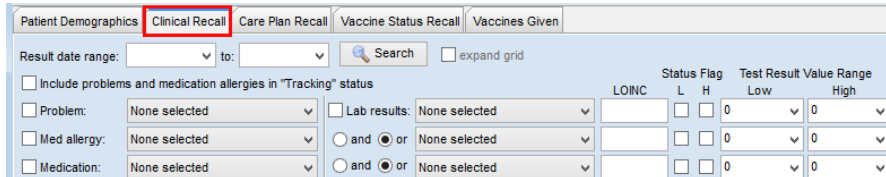
Detailed Videos

> 🎞 **Tips**: Below is a collection of short videos on how to run Clinical Recalls for **Medication Allergies**, **Medications**, and **Labs**. As each short video ends, you'll have the opportunity to click to move to the next video. Or, you can select a specific video from the playlist in the upper left-hand corner of the video. To enlarge the video, double-click it, or click the **Fullscreen** button ⬚ . When you're done viewing, press **Esc** to exit fullscreen mode.
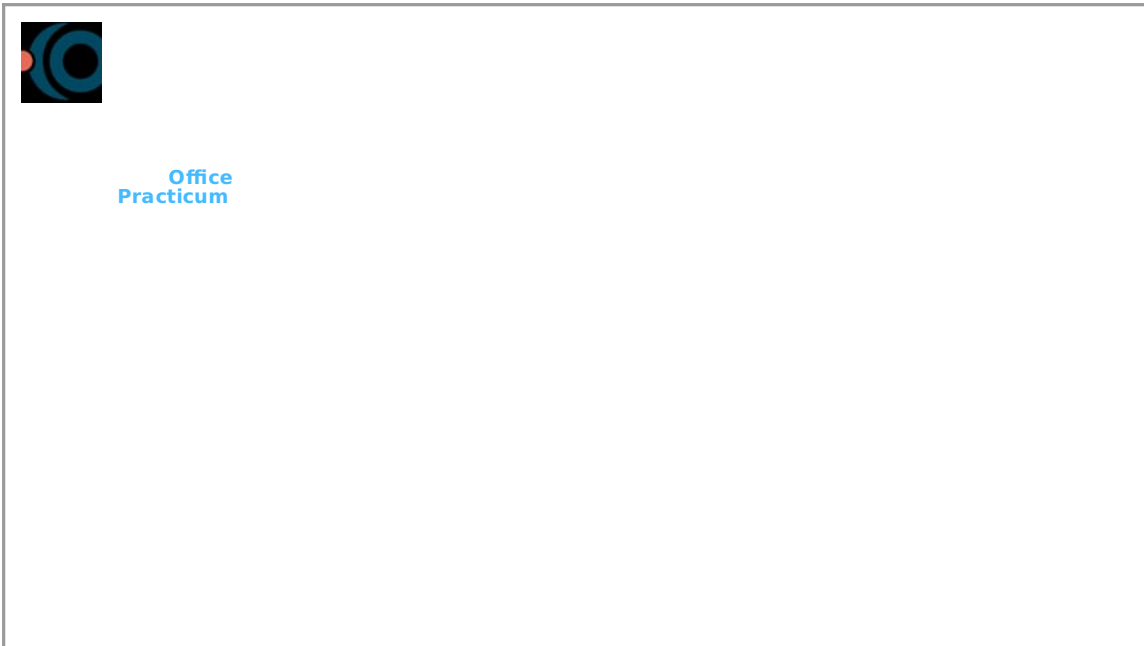
Version 14.10

Prior to running the Clinical Recall Report, you will first need to run the Patient Demographics Report. The Clinical Recall Report displays a list of patients and/or recalls by using the following search criteria.

Clinical Recall Report

To run a Clinical Recall Report, enter the following criteria before clicking the **Search** button:

- **Result Date Range**: A date range is required for results to display. This will default to a one month date range (where the latest date is the current calendar date) if you chose the 'At least one visit since' radio button in the Patient Demographics tab. However, it can be changed. The date range entered will dictate the dropdown items that will appear for Problems, Med Allergies, Medications, and Lab Results.
- **Include problems and medication allergies in "Tracking" status**: Select this checkbox to include problems or medication allergies that have been marked with the "Tracking" status in the patient chart.
- **Problem**: Select this checkbox to include Problems as listed in the patient charts. After selecting the checkbox to include Problems, use the dropdown to select the individual Problem entries.

> ℹ️ **Note**: A patient must meet specified criteria before being added the the Demographic Analysis and Recall diagnosis (Problem) recall report. See **Diagnosis Recall Criteria** for more information.

- **Med Allergies**: Select this checkbox to include Medication Allergies as listed in the patient charts. After selecting the checkbox to include Med Allergies, use the dropdown to select the individual Med Allergy entries.
- **Medication**: Select this checkbox to include Patients actively prescribed a particular medication(s). After selecting the checkbox to include Medications, use the dropdown to select the individual Medication entries.
- **Lab Results**: To display a list of patients who have had a specific lab test. Select the **Lab results** checkbox and select a lab test from the dropdown.

  - You can include up to three different lab tests (or same test from three different labs). Choose **and/or** radio buttons as

appropriate.
- You can also display for just patients with "high" or "low" results utilizing the **L** or **H** checkboxes.