Demographic Analysis and Recall: Run a Care Plan Recall Report

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Version 20.15

> **Path: Practice Management tab > Demographic Analysis/Recall > Care Plan Recall tab**

About

Prior to running the Care Plan Recall, you will first need to create a **Patient Demographics List**. The Care Plan Recall is used to display patients who are due for items associated with a Care Plan. A **detailed video** demonstrating this workflow can be found below.

Summary of Steps

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

1. Navigate to the **Care Plan Recall** tab of the Demographic Analysis/Recall Report by following the path above.
2. Select one or more **Recall Plans** from the Recall Plan(s) drop-down.
3. Use the **Recall Item** drop-down to select the recall item associated with the recall plan.
4. *(Optional)* Select the **Co-morbid**, **Include all qualified**, or **Include if due for any item in plan** checkboxes, as appropriate.
5. Enter a **Recall Date**.
6. Click the **Search** button.
7. *(Optional)* Exclude patients, if appropriate.
8. *(Optional)* Add or remove columns from the grid using the **Show/Hide Visible columns** button.
9. *(Optional)* **Sort**, **filter**, or **group** the data.
10. *(Optional)* **Save the report** criteria for future use.
11. Take action using the **Print Letters**, **Send Messages,** or **Export** buttons.

Detailed Video

> ⊞ **Tip**: To enlarge the video, double-click it, or click the **Fullscreen** button
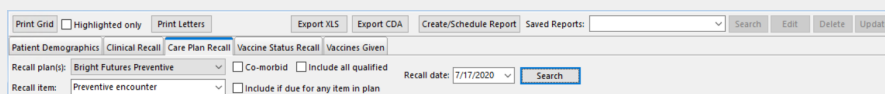>
> Version 20.14
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> > **Path: Practice Management tab > Demographic Analysis/Recall**
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> ## About
>
> Prior to running the Care Plan Recall, you will first create a **Patient Demographics List**. The Care Plan Recall is used to display patients who are due for items associated with a Care Plan.
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> ### Care Plan Recall Criteria
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> Follow the steps below to run a Care Plan Recall Report after building your Patient Demographics List:
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> 1. Complete the recall criteria by making selections from the following options.
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> - **Recall plan(s):** Use the drop-down to select a Care Plan or multiple Care Plans from the list.

- **Recall item:** Use the drop-down to select a recall item associated with the recall plan.
- **Co-morbid:** Select this checkbox if multiple Recall Plans were selected and you want to include only patients who are enrolled in all selected Care Plans.
- **Include if due for any item in plan:** Select this checkbox if a Recall item was not selected. This selection allows you to view patients that are due for all items associated with a Care Plan.
- **Include all qualified:** Select this checkbox to include patients who qualify for the specified Care Plan that have not yet been enrolled.
- **Recall Date**: The date defaults to the current date but can be set to a future date, by clicking the drop-down and selecting from the calendar, to proactively run Care Plan Recalls.

2. Click the **Search** button.

📌 **Note**: If you do not wish to include a particular patient or multiple patients in the report output or message file, select the **Exclude** checkbox next to the patient's name. For more information on the report output options, click **here**.

3. *(Optional)* To take action from the Care Plan Recall tab, use the **Print Letters**, **Send Messages**, **Export XLS**, or **Export CDA** buttons located at the top of the window.