

# 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

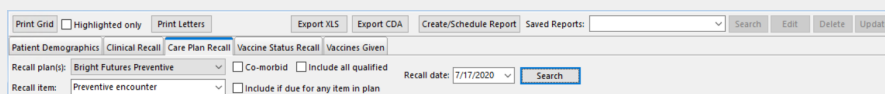
Version 20.14

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

## 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.

## Care Plan Recall Criteria



The screenshot shows a software interface for setting recall criteria. At the top, there are buttons for 'Print Grid', 'Highlighted only', 'Print Letters', 'Export XLS', 'Export CDA', 'Create/Schedule Report', and 'Saved Reports:'. Below these are tabs for 'Patient Demographics', 'Clinical Recall', 'Care Plan Recall', 'Vaccine Status Recall', and 'Vaccines Given'. The 'Care Plan Recall' tab is active. Under this tab, there are two rows of options. The first row has a dropdown for 'Recall plan(s):' set to 'Bright Futures Preventive', a checkbox for 'Co-morbid', a checkbox for 'Include all qualified', and a dropdown for 'Recall date:' set to '7/17/2020'. The second row has a dropdown for 'Recall item:' set to 'Preventive encounter' and a checkbox for 'Include if due for any item in plan'. A 'Search' button is located to the right of the 'Recall date:' dropdown.

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

1. Complete the recall criteria by making selections from the following options.

- **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.