

Demographic Analysis and Recall Overview

Last Modified on 12/28/2021 4:23 pm EST

Version 14.19

About

The Demographic Analysis and Recall is a report you can use within OP to generate a list of patients according to specific criteria. Unlike financial reports, this report is primarily used to obtain patient lists meeting specific clinical information. All recall reports require a patient list using the input from the Patient Demographics tab. You can customize your patient demographics list to include only patients within a certain age range, or other criteria including provider, insurance carrier, and zip code.

The Clinical Recall will produce a report, by a date range, for patients with the selected problems, medication allergies, medications, or lab results. A Care Plan Recall uses OP or Practice-created Care Plans to produce a report of past due items. A Practice would use the Vaccine Status Recall to generate a list of patients who would be due or past due for a specific vaccine or all vaccines. The Vaccines Given report is the only report group that does not require a patient demographics list. The report will allow a Practice to review vaccines administered during a specified date range. This report can be run by VFC and Non-VFC lots.

For additional information on setup and running each report, click the link to the report below.

- [Patient Demographics](#)
- [Clinical Recall](#)
- [Care Plan Recall](#)
- [Vaccine Status Recall](#)
- [Vaccines Given](#)

Report Actions

In the Demographic Analysis/Recall report, there are common actions used when navigating the report tabs. Below you will find how each can be used.

Item	Action
Print Grid	The Print Grid button is used to print the report output.
Highlighted only	The Highlighted only checkbox is used to print a single selection from the generated list.
Print Letters	Selecting the Print Letters button opens the General Letters Saved Templates window, which enables you to print letters or labels. If your practice has not saved any general letter templates, you will want to do so prior to using the Print Letters button. Click here for information on building General Letters.
Send Messages	Send Messages uses OP's integrated Patient Message eXchange . The selection of the Send Messages button allows a practice to send a message specific to a Contact's preferred method.
Export XLS	The report will export to Excel. The option only works if Excel is installed on your local computer.
Export CDA	Export CDA will create a CDA file for a selected patient.

Version 14.10

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