Demographic Analysis and Recall: Saved Reports

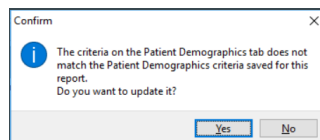Last Modified on 12/10/2021 4:18 pm EST

Version 20.15

About

Office Practicum has designed recall functionality, within OP, which is referred to as Callie. From the Demographic Analysis and Recall report, you have the ability to create saved reports. Saving the report criteria will allow the practice to easily run common reports. Reports may be saved from all tabs in the Demographic Analysis and Recall report. The saved reports are specific to the tab they were created and saved, which allows the user to view only those reports that may be run from the selected tab.

Create a Saved Report

1. Create the report to save.
2. Click the **Create/Save Report** button.
3. Enter the name of the report in the **Name** field.
4. Add a description of the report in the **Description** field.
5. Click the **Save** button.

Run a Saved Report

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select a report.
3. A confirmation window displays.

   - **Yes**: Click the Yes button only if you have created a different Patient Demographics list from the saved report.
   - **No**: Click the No button to retain the saved reports Patient Demographics list from the saved report.
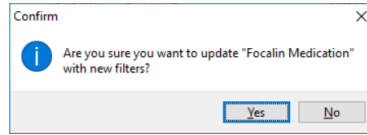

4. The selected report displays using the saved report information.

Modify and Update a Saved Report

When a saved report is run it will use the Patient Demographics list and the tabs dates and selected information. There may be times when the Patient Demographics list or the Patient Demographics list and the report information need to be changed. Below are the steps to take to modify and update a saved report.

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select a report.
3. The selected report is displayed using the saved report information.
4. Modify the report information.

   - **Patient Demographics**: Click the Patient Demographics tab and modify the information to reflect the changes for the patient list.
   - **Clinical Recall, Care Plan Recall, Vaccine Status Recall, Vaccines Given**: Click the tab, if not already on the tab, and modify the information to reflect the changes.

5. Click the **Search** button, the report displays using the modified information.

6. Click the **Update** button.
7. A confirmation window display.

- **Yes**: Click the Yes button to update the saved report with the modified information.
- **No**: Click the No button if you do not wish to save the modified information.

Delete a Saved Report

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select the report to delete.
3. Click the Delete button, a confirmation window displays.

- **Yes**: Click the Yes button to delete the saved report.
- **No**: Click the No button to exit deleting the saved report.
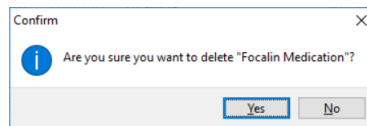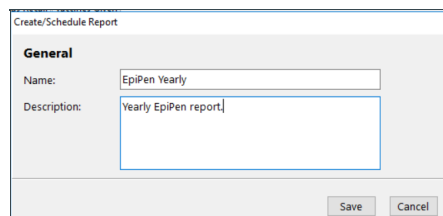

Version 20.14

Overview

Office Practicum has designed recall functionality, within OP, which is referred to as Callie. From the Demographic Analysis and Recall report you have the ability to create saved reports. Saving the report criteria will allow the practice to easily run common reports. Reports may be saved from all tabs in the Demographic Analysis and Recall report. The saved reports are specific to the tab they were created and saved, which allows the user to view only those reports that may be run from the selected tab.
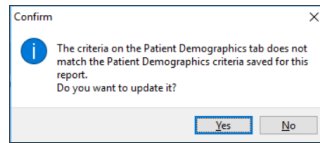
Create a Saved Report

1. Create the report to save.
2. Click the **Create/Schedule Report** button, the *Create/Schedule Report* window displays.
3. Enter the name of the report in the **Name** field.
4. Add a description of the report in the **Description** field.
5. Click the **Save** button.

Run a Saved Report

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select a report.
3. A confirmation window displays.

- **Yes**: Click the Yes button only if you have created a different Patient Demographics list from the saved report.
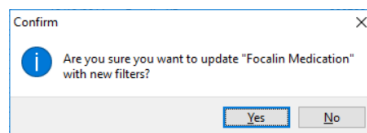- **No**: Click the No button to retain the saved reports Patient Demographics list from the saved report.

4. The selected report displays using the saved report information.

Modify and Update a Saved Report

When a saved report is run it will use the Patient Demographics list and the tabs dates and selected information. There may be times when the Patient Demographics list or the Patient Demographics list and the report information need to be changed. Below are the steps to take to modify and update a saved report.

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select a report.
3. The selected report displays using the saved report information.
4. Modify the report information.

   - **Patient Demographics**: Click the Patient Demographics tab and modify the information to reflect the changes for the patient list.
   - **Clinical Recall, Care Plan Recall, Vaccine Status Recall, Vaccines Given**: Click the tab, if not already on the tab, and modify the information to reflect the changes.

5. Click the **Search** button, the report displays using the modified information.
6. Click the **Update** button.
7. A confirmation window display.

   - **Yes**: Click the Yes button to update the saved report with the modified information.
   - **No**: Click the No button if you do not wish to save the modified information.

Delete a Saved Report

1. Navigate to the tab where the report was saved.
2. Click the drop-down in the **Saved Reports** field and select the report to delete.
3. A confirmation window displays.

   - **Yes**: Click the Yes button to delete the saved report.
   - **No**: Click the No button to exit deleting the saved report.