Keep Patients Coming Back with Partner's Patient Recaller

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RECALLER

You can use recaller to find and contact patients who need flu shots, patients due for physicals, or any other subset of your patient population

Also known as the "LIST" Report

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RECALLER

We will cover the following in this class today:

- How to run a Recaller Report / List

- How to Recall Patients for Physicals

- How to save and restore Recaller Reports / Lists

- Criteria References

- Output References

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How to run a Recaller / "List" Report

First things first... opening the Recaller Program!

Building your Report / "List"

Choosing your criteria (this is a "*" field!)
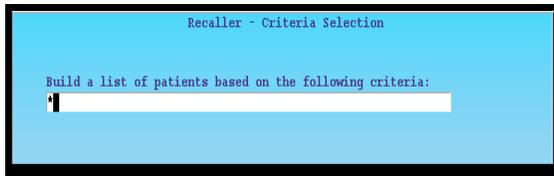
Building your Report / "List"

Select your desired criteria one at a time
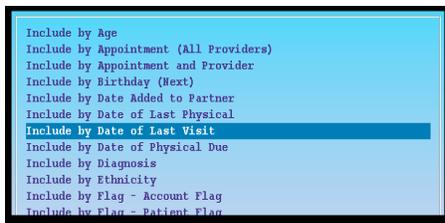
Building your Report / "List"

Once you select your desired criteria:

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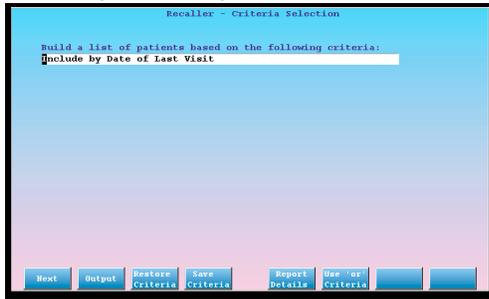
Building your Report / "List"

<F1> to add your criteria to your list and to add your details:

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Building your Report / "List"

Enter your details:

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Building your Report / "List"

Press <F1> to "save/next" and you now have your LIST!

Building your Report / "List"

Let's narrow down this list!
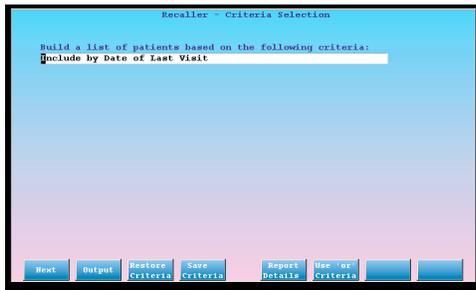
Building your Report / "List"
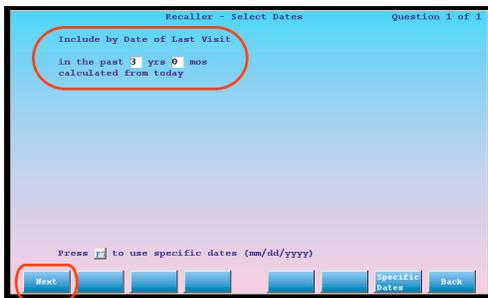
Building your Report / "List"

We just narrowed our list by 75%!

```
            Recaller - Criteria Selection

        425 Patients
        330 Guarantors associated with these Patients
        329 Custodians associated with these Patients

    Build a list of patients based on:
    the date they were last seen
and diagnoses
and █
```
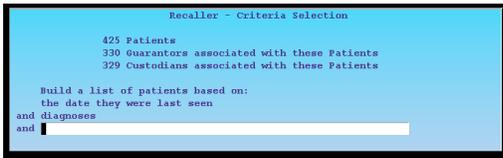
Report / "List" Details
Press <F5> to view the report details:

```
            Recaller - Report Details
Criteria:
    Build a list of patients based on
    the date they were last seen
 and diagnoses


Selections:

the date they were last seen
  in the past 3 yrs
  calculated from today

diagnoses they have had
  in the past 3 yrs
  calculated from today
  diagnoses:
  493.00  Asthma Extrinsic NOS (Major 493.00  Asthma Mild Intermit (Major
  493.00  Asthma Mild Persist (Major  493.00  Asthma Mod Persist (Major D
  493.00  Asthma Sev Persist (Major D 493.01  Status Asthmaticus
  493.01  ~Asthma Acute               493.02  Asthma Extrinsic w/Acute Ex
  493.10  Asthma Intrinsic NOS (Major 493.12  Asthma Intrinsic w/Acute Ex
```
```
  Done    Jump to  Jump to  Send                        Search
          Top      Bottom   To...                       Pattern
```

OUTPUT Options
Press <F2> to select your output options:

```
    Page Up                 F12                Page Down
                    Recaller - Output

To save this report for future use, press F4.

    120 Patients
    119 Guarantors associated with these Patients
    119 Custodians associated with these Patients

1. What type of output do you want?
   X Standard Lists Patient Standard List
     Form Letters   Custodian Form Letters
     Labels         Patient Labels
     Subtotal by Age and Sex Report

2. How should the output be sorted?
   X Last Name
     Zip Code
     Birthday
     Birth Date
```
```
  Process                 Save      Report              Back
                          Criteria  Details
                                            6:11         NUM
```

OUTPUT Options

How do you want this list to present?

```
1. What type of output do you want?
   X Standard Lists  Patient Standard List
     Form Letters    Custodian Form Letters
     Labels          Patient Labels
     Subtotal by Age and Sex Report
```

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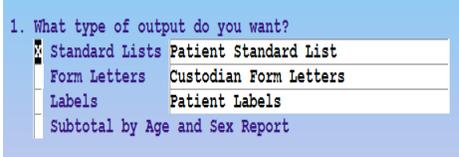
OUTPUT Options

Select Output Sorting Options:

(Birthday or Birthdate? If you are printing physical reminders or birthday
cards, you may want to sort the patient list by their birthday, regardless of
the year of their birth. If you are generating other materials, by age, you may
wish to sort patients by actual birthdate, including the year.)

```
2. How should the output be sorted?
   X Last Name
     Zip Code
     Birthday
     Birth Date
```

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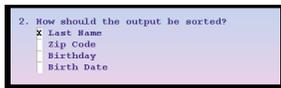
OUTPUT DESTINATION

Press <F1> to "Process" / Continue and then
Decide where you want to send your list:

```
           Recaller - Output Selection

   X View on Screen
     Print
     E-mail
     Save to Workstation
     Save to 'srsfiles'
```

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REVIEW YOUR LIST

RECALL PATIENTS FOR PHYSICALS

Reminding patients and families about their physicals is good for your patients and good for your practice!

A healthy patient is a happy patient!

RECALL PATIENTS FOR PHYSICALS

Select "Include by Date of Physical Due"

RECALL PATIENTS FOR PHYSICALS

Enter the date range that will include patients who have recently missed their physical due date and / or those for whom the time for a physical is approaching (A patient's next due physical date is set, based on your office's custom physical schedule, whenever they are billed for a Well Child procedure)

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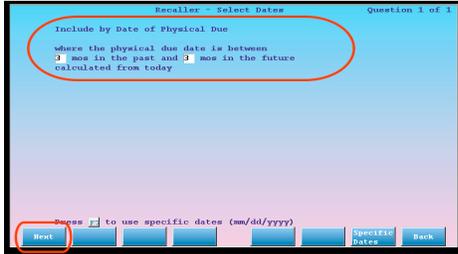
RECALL PATIENTS FOR PHYSICALS

Let's narrow down this list for active patients only:

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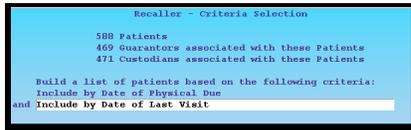
RECALL PATIENTS FOR PHYSICALS

Let's say patient's who have visited in the past three years:

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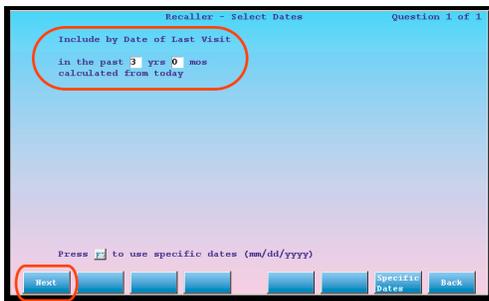
RECALL PATIENTS FOR PHYSICALS

Let's exclude patients that are no longer yours:

```
Exclude by Appointment and Provider
Exclude by Diagnosis
Exclude by Ethnicity
Exclude by Flag - Account Flag
Exclude by Flag - Patient Flag
Exclude by Insurance Plan
Exclude by Procedure (All Providers)
Exclude by Procedure and Provider of Service
```
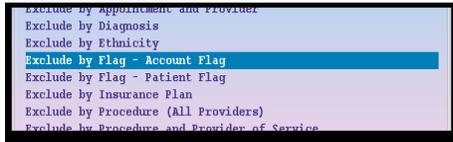
RECALL PATIENTS FOR PHYSICALS

Use the two "Exclude by Flag" criteria to remove Inactive, Dismissed, Deceased, and / or other sets of patient and account flags that you do not want to recall:
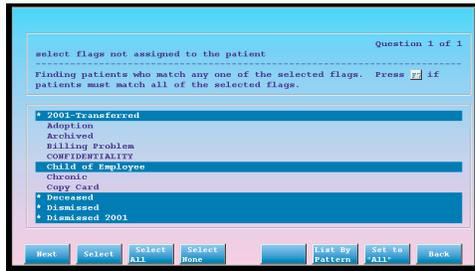
```
                                                  Question 1 of 1
select flags not assigned to the patient
----------------------------------------------------------------
Finding patients who match any one of the selected flags.  Press r if
patients must match all of the selected flags.


* 2001-Transferred
  Adoption
  Archived
  Billing Problem
  CONFIDENTIALITY
  Child of Employee
  Chronic
  Copy Card
* Deceased
* Dismissed
* Dismissed 2001

Next    Select   Select   Select              List By   Set to   Back
                 All      None                 Pattern   "All"
```

RECALL PATIENTS FOR PHYSICALS

Exclude by Appointment Criteria to Avoid Patient's who are already scheduled for their Physical:

```
              Recaller - Criteria Selection
     427 Patients
     383 Guarantors associated with these Patients
     386 Custodians associated with these Patients

Build a list of patients based on the following criteria:
Include by Date of Physical Due
Include by Date of Last Visit
Exclude by Flag - Patient Flag
Exclude by Flag - Account Flag
Exclude by Appointment (All Providers)
```
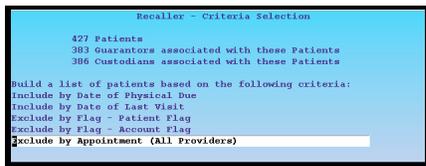
RECALL PATIENTS FOR PHYSICALS

Exclude by Appointment Criteria to Avoid Patient's who are
already scheduled for their Physical:
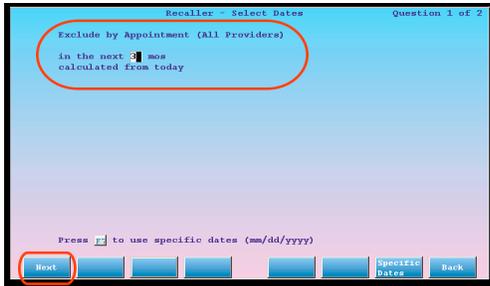
RECALL PATIENTS FOR PHYSICALS

Exclude by Appointment Criteria to Avoid Patient's who are
already scheduled for their Physical:

RECALL PATIENTS FOR PHYSICALS

At any time, press <F5> "Report Info" to review the specific details
you have entered for each criteria in your recaller report / list:
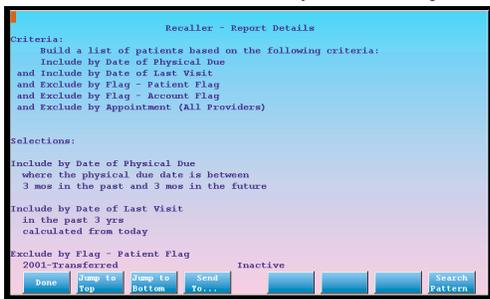
RECALL PATIENTS FOR PHYSICALS

You can press <F4> to save and restore your criteria settings for this report if you like it so you do not have to take the time to build it again next time you want to recall patients for physicals due.

Press <F2> to select your desired output for this report / list.

SAVE & RESTORE LIST SETTINGS

Press <F4> after entering your criteria to save your list:
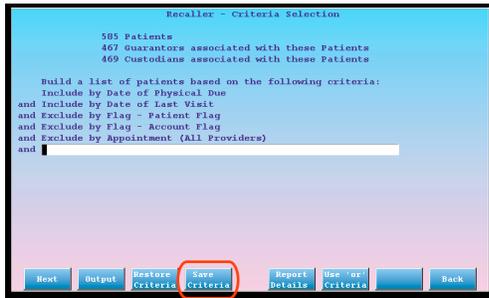
SAVE & RESTORE LIST SETTINGS

Name your report / list and add a description so you know what this list is and then press <F1> to save it:
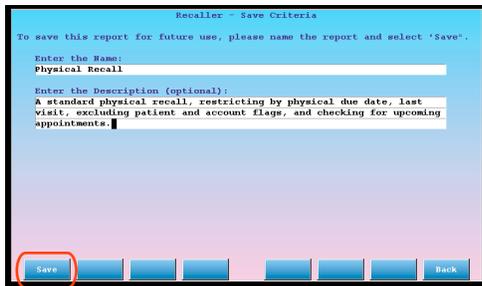
SAVE & RESTORE LIST SETTINGS
Press <F3> to "Restore Criteria":

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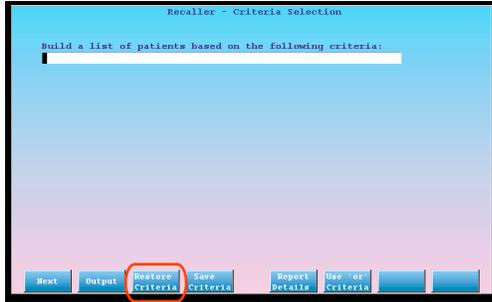
SAVE & RESTORE LIST SETTINGS

Select which saved report / list you'd like to use:

If you can't remember what the report is for you can press <F4> and / or <F5> to read the description or see the criteria details:

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SAVE & RESTORE LIST SETTINGS

Press <F1> to "Jump to Output" and go directly to the report's output options:

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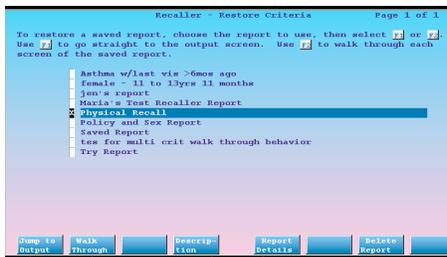
SAVE & RESTORE LIST SETTINGS

Press <F2> if you'd like to "Walk Through" to tweak it and make any slight changes

Press <F7> to delete any reports / list that you no longer need
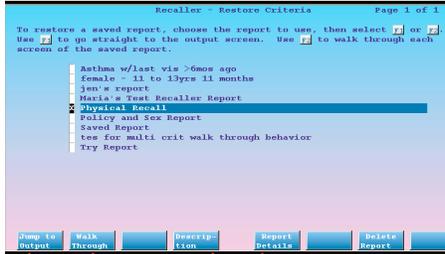
CRITERIA REFERENCE

- Age
- Appointments by Providers
- Procedures by Providers
- Next Birthday
- Date added to Partner
- Date of last physical
- Date of last visit

CRITERIA REFERENCE

- Date of physical due
- Diagnoses
- Ethnicity, Race
- Account and Patient Flags
- Insurance Plans
- Preferred Languages
- Procedures

CRITERIA REFERENCE

- Primary Care Provider
- Sex
- Zip code of Custodian

OUTPUT REFERENCE

- Output Types:

```
1. What type of output do you want?
   X Standard Lists  Patient Standard List
     Form Letters    Custodian Form Letters
     Labels          Patient Labels
     Subtotal by Age and Sex Report
```

OUTPUT REFERENCE

- Patient Lists
  - Includes basic information about each found patient

```
1. What type of output do you want?
   X Standard Lists  *
     Form Letters    Custodian Form Letters
     Labels          Patient Labels
     Subtotal by Age and Sex Report

        Patient Standard List
        Custodian Standard List
        Guarantor Standard List
```

OUTPUT REFERENCE

- Form Letters
  - Each patient on the list would receive their own letter

```
1. What type of output do you want?
     Standard Lists Patient Standard List
  X  Form Letters   *
     Labels          Patient Labels
     Subtotal by Age and Sex Report

          Custodian Form Letters
          Guarantor Form Letters
          Patient Form Letters
```

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OUTPUT REFERENCE

- Form Letters

```
                                    Page 1 of 1
FORM GENERATOR                      Anthony Kaminski

    Failed Eye Exam         █  Transfer Form
 █  Medical Records
 █  Physical Due
 █  Referral/Newborn Letter
 █  School Nurse Meds Admin
 █  School/PE Excuse
 █  Sports Form
 █  Termination - Missed Appt


rocess
Forms
```

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OUTPUT REFERENCE

- Mailing Labels
  - Formatted to standard Avery sizes or your own custom label.

```
1. What type of output do you want?
     Standard Lists Patient Standard List
     Form Letters    Patient Form Letters
  X  Labels          *
     Subtotal by Age and Sex Report

          Custodian Labels
          Guarantor Labels
          Patient Labels
```

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OUTPUT REFERENCE

- Mailing Labels
  - Laser Labels
    - PCC Configs this at 66 lines per page
  - Custom Labels
    - Enter your label dimensions and load the labels into your printer
  - Multiple Sets
    - Need more than one label per patient?
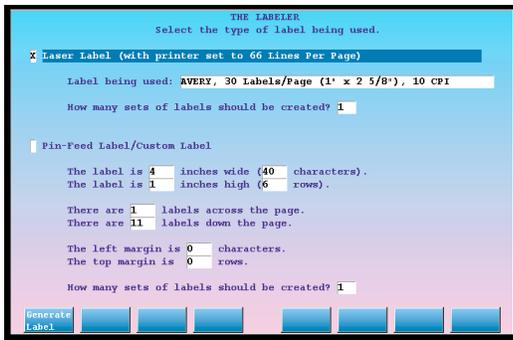
OUTPUT REFERENCE

OUTPUT REFERENCE

- Subtotal by Age and Sex Report
  - View detailed totals of the patients based on your search criteria
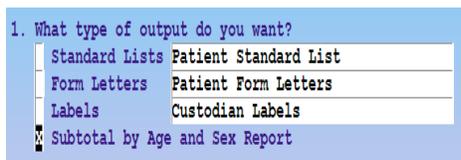
OUTPUT REFERENCE

• Subtotal by Age and Sex Report

```
Recaller - Subtotal by Age and Sex Report

Age Range       Female  Male   Total
Not Available      0      0       0
Under 1 Month      0      0       0
1 Month            0      0       0
2 Months           0      0       0
3 Months           3      1       4
4 Months           4      4       8
5 Months           3      2       5
6 Months           7      5      12
7 Months           4      2       6
8 Months           2      0       2
9 Months           2      2       4
10 Months          4      4       8
11 Months          3      1       4
1 Year            42     35      77
2 Years           19     26      45
3 Years           20     29      49
4 Years           19     25      44
5 Years           21     23      44
6 Years           22     16      38
```

| Done | Jump to Top | Jump to Bottom | Send To... | | | | Search Pattern |

RECALLER SORTING OPTIONS

• Sorting your output
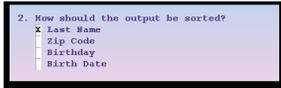
```
2. How should the output be sorted?
X Last Name
  Zip Code
  Birthday
  Birth Date
```

• Birthday or Birthdate

  – If you are printing physical reminders or birthday cards, you may
    want to sort patients by their birthday, regardless of the year of
    their birth

  – If you are generating other materials, by age, you may wish to sort
    patients by actual birthdate, including the year.

OUTPUT SELECTION

```
Recaller - Output Selection




X View on Screen
  Print
  E-mail
  Save to Workstation
  Save to 'srsfiles'
```

Keep Patients Coming Back with Partner's Patient Recaller