

The Patient Recaller

PCC



Pediatric EHR Solutions

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1. Introduction	3
2. Recall Patients for Physicals	12
3. Save and Restore Recaller Settings	18
3.1. Save a Recaller Report	18
3.2. Restore a Recaller Report	19
4. Recaller Criteria Reference	21
4.1. Age.....	22
4.2. Appointments.....	22
4.3. Appointments (or Procedures) By Provider.....	23
4.4. Birthday (next).....	23
4.5. Date Added to Partner.....	24
4.6. Date of Last Physical.....	24
4.7. Date of Last Visit.....	25
4.8. Date of Physical Due.....	26
4.9. Diagnoses.....	26
4.10. Ethnicity, Race.....	27
4.11. Flags, Account or Patient.....	27
4.12. Insurance Plan.....	28
4.13. Procedures.....	29

4.14. Provider (Primary Care).....	30
4.15. Sex.....	31
4.16. ZIP Code of Custodian.....	31
5. Recaller Output Reference.....	32
5.1. Totals.....	32
5.2. Recaller Output Types.....	32
5.2.1 Patient Lists.....	33
5.2.2 Form Letters.....	33
5.2.3 Mailing Labels.....	34
5.2.4 Subtotal By Age and Sex Report.....	35
5.3. Recaller Sorting Options.....	36
5.4. Output Selection.....	36

1. Introduction

The Patient Recaller (**recaller**) is a report that can create custom call lists, form letters, and mailing labels for your patients and families. You can create custom searches using thousands of possible criteria combinations, and the Recaller will help you contact those different groups of patients.

Use the Recaller to find the right patients and then print out physical reminders, flu shot announcements, or immunization recalls. You can also use the Recaller to do quick research and reporting on your patient populations.

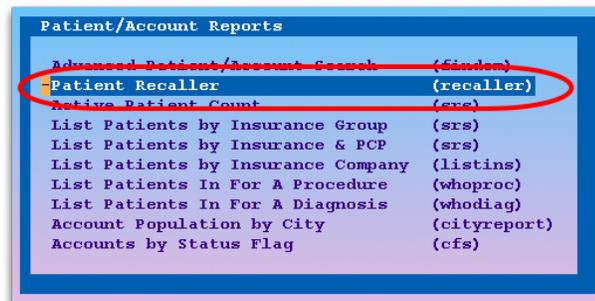
Quickstart: Recalling Patients

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. Running **recaller** works the same way regardless of your goal. Follow the procedure below.

Well Visit Recalls and Saving Report Criteria: More detailed guides to running a physical visit recall or saving and restoring report settings are available online at <http://learn.pcc.com>.

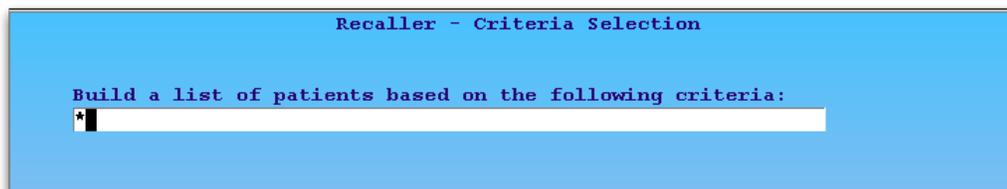
Step 1: Run the Recaller

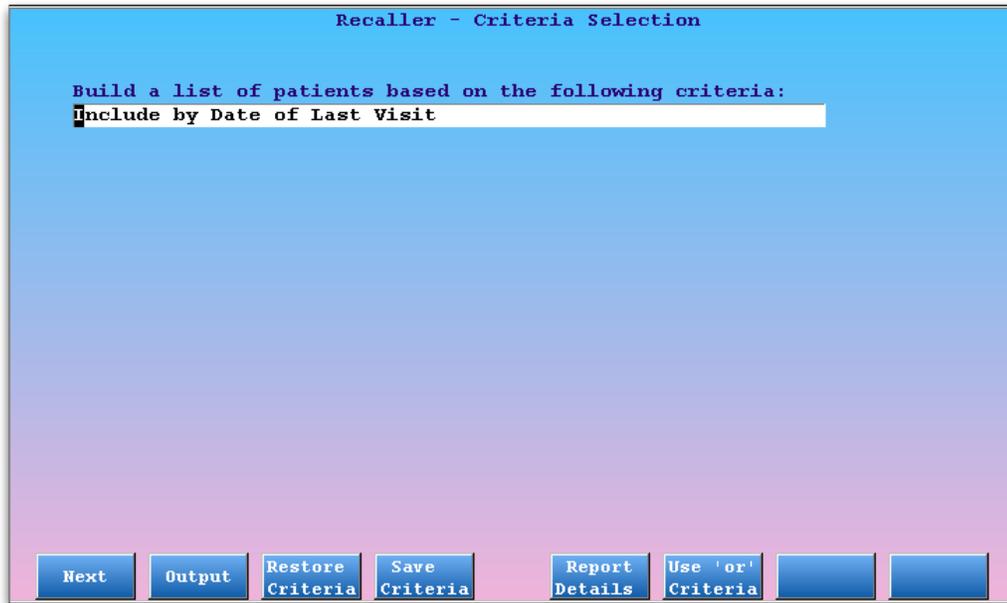
You can run **recaller** from the Patient/Account Reports window or by typing **recaller** at a command prompt.



Step 2: Enter a Criteria to Build a List of Patients

Your patient database includes thousands of patients. Enter one or more criteria that will determine which patients to recall. For a list of possible criteria, enter an asterisk and press Enter.





For the example above, the user needs to see all patients who have visited the practice in the past three years, a common way of displaying all "active" patients. They will therefore limit by the patient visit date criteria.

All Patients?: If you want to work with all patients in your database for some reason, enter no criteria and press [F2 - *Output*] to continue to the output selection screen. You can skip down to **Step 8**, below.

Step 3: Press [F1 - *Next*]

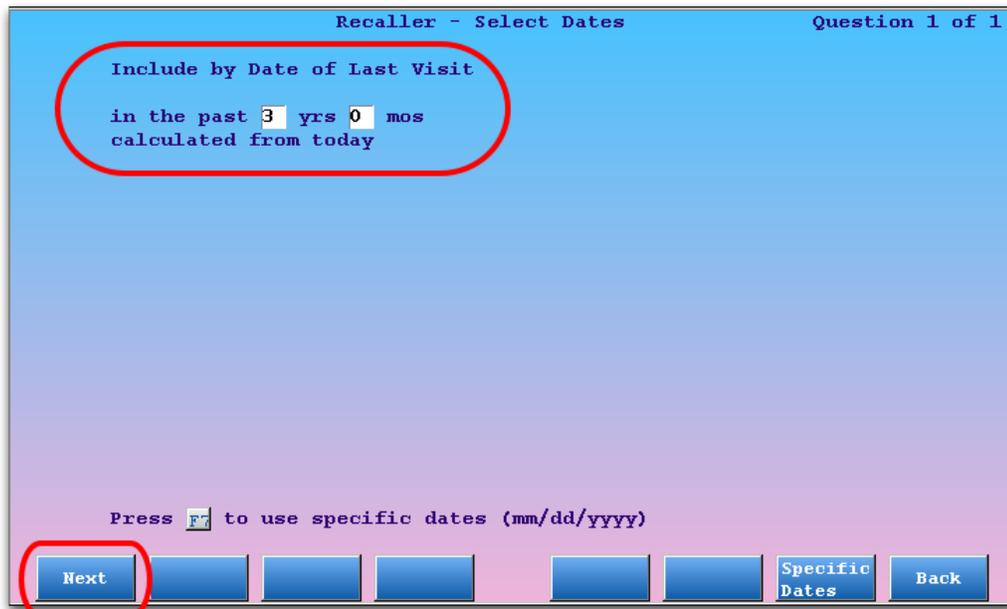
Press **F1** to add the criteria to your report and proceed to select specific details.



Step 4: Enter Criteria Details

For each criteria item you select, **recaller** will ask you for details. You will see one or more screens asking you to clarify the criteria.

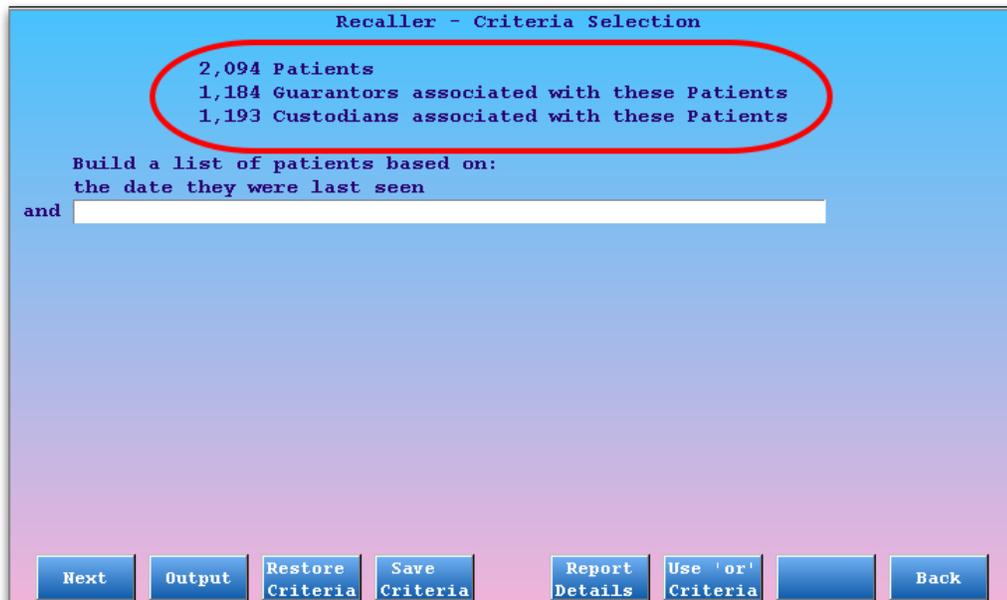
In our example, the user wishes to review a list of active patients, so they will enter a range of the past three years. The user could also press [F7 - *Specific Dates*] to find patients who had visited for a specific date range.



After answering the criteria questions, press [F1 - Next].

Step 5: Review Patient Totals

After you have entered criteria details, Partner will return you to the first **recaller** screen. At the top, you can see the current account and patient totals, based on your criteria so far.



Step 6: Optional: Add More Criteria

You can add multiple criteria for a more refined recall list. Add a criteria in the "and" fields by using the asterisk (*). Then press [F1 - Next] and answer questions to enter recall criteria details.

Recaller - Criteria Selection

2,094 Patients
1,184 Guarantors associated with these Patients
1,193 Custodians associated with these Patients

Build a list of patients based on:
the date they were last seen
and diagnoses



diagnoses they have had
in the past 3 yrs 0 mos
calculated from today



The following is a listing of Items/Groups that matched the Pattern entered. Select/Deselect items from the listing below.

* 493.00	Asthma Extrinsic NOS (Major Diagnosis)
* 493.00	Asthma Mild Intermit (Major Diagnosis)
* 493.00	Asthma Mild Persist (Major Diagnosis)
* 493.00	Asthma Mod Persist (Major Diagnosis)
* 493.00	Asthma Sev Persist (Major Diagnosis)
* 493.01	Status Asthmaticus
* 493.01	~Asthma Acute
* 493.02	Asthma Extrinsic w/Acute Exacer
* 493.10	Asthma Intrinsic NOS (Major Diagnosis)
* 493.12	Asthma Intrinsic w/Acute Exacer
* 493.22	Asthma Chron Obstr w/Acute Exac
* 493.82	Asthma Cough Variant (Major Diagnosis)
* 493.90	Asthmatic Bronchitis
* 493.91	~Status Asthmaticus

Process Select Select All Select None



Recaller - Criteria Selection

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

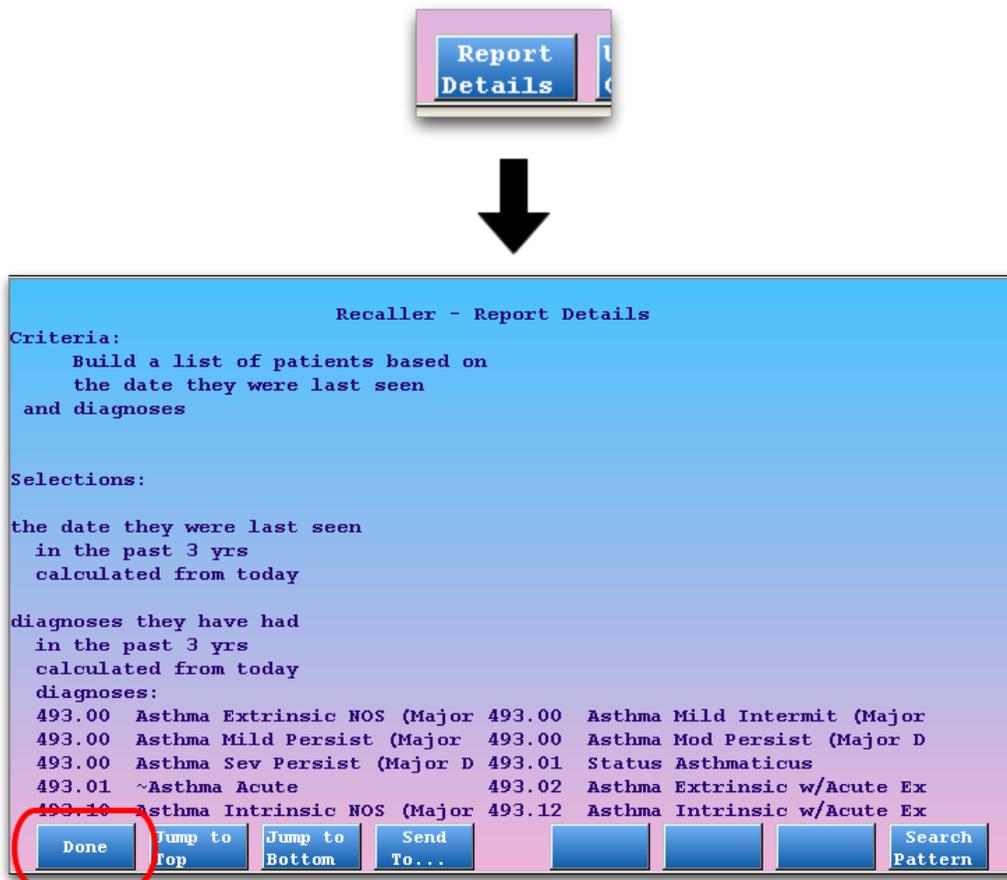
Build a list of patients based on:
the date they were last seen
and diagnoses

As you add additional criteria, the size of your recall list will shrink as the number of patients who meet all the criteria reduces. In the above example, the office now knows they have 425 patients who have had some kind of asthma diagnosis billed within the past three years.

Note: In the above example, the user wishes to limit the list of active patients to those who have had an asthma diagnosis of any kind. When entering diagnoses, they used the [F6 - *List By Pattern*] function. For more information on all recaller criteria and the tools for entering criteria details, read Recaller Criteria Reference at <http://learn.pcc.com>.

Step 7: Optional: Review Criteria Details

At any time, press [F5 - *Report Details*] to review the details of your selected criteria.



Press **F1**, or **F12** to return to the criteria list screen.

Step 8: Press [F2 - *Output*] to Continue

Once you have finished selecting your criteria, press **F2** to visit the Output screen.





Recaller - Output

To save this report for future use, press **F4**.

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

1. What type of output do you want?

<input checked="" type="checkbox"/>	Patient List	Standard List
<input type="checkbox"/>	Form Letters	Patient Form Letters
<input type="checkbox"/>	Labels	Guarantor Labels
<input type="checkbox"/>	Subtotal by Age and Sex Report	

2. How should the output be sorted?

<input checked="" type="checkbox"/>	Last Name
<input type="checkbox"/>	Zip Code
<input type="checkbox"/>	Birthday
<input type="checkbox"/>	Birth Date

Process **Save Criteria** **Report Details** **Back**

Step 9: Select Output

Use the first output selection question to choose what the Recaller should produce. The Recaller can create patient lists, form letters, labels, or a special age and sex subtotal report.

1. What type of output do you want?

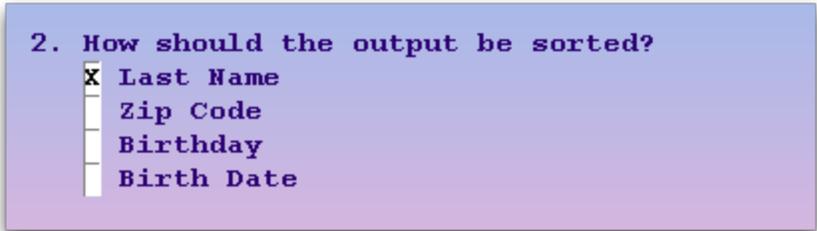
<input checked="" type="checkbox"/>	Patient List	Standard List
<input type="checkbox"/>	Form Letters	Patient Form Letters
<input type="checkbox"/>	Labels	Guarantor Labels
<input type="checkbox"/>	Subtotal by Age and Sex Report	

For the first three options, you can use an asterisk to select the specific style of patient list or form letter or label category. Some options, such as form letters or labels, will prompt you for details after you press **[F1 - Process]**.

For a guide to all available output formats, read the Recaller Output Reference at <http://learn.pcc.com>.

Step 10: Select Sorting Option

Select whether your lists, form letters, or other output should be sorted by Last Name, ZIP code, Birthday, or Birthdate.



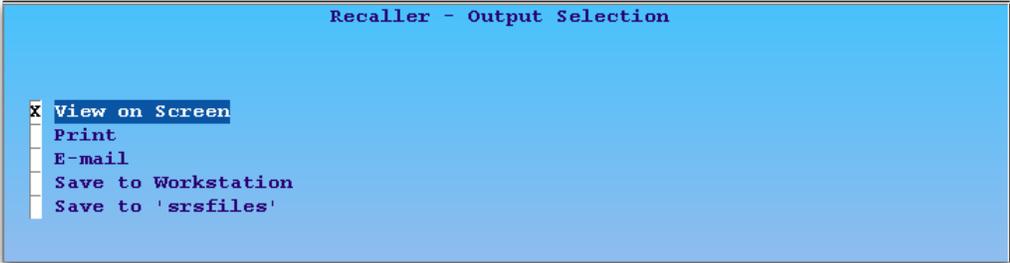
Birthday or Birthdate? If you are printing physical reminders or birthday cards, you may want to sort the patient list by their birthday, regardless of the year of their birth. If you are generating other materials, by age, you may wish to sort patients by actual birthdate, including the year.

Step 11: Press [F1 - Process] to Continue



Step 12: Choose Output Destination

On the Output Selection screen, choose whether to send your resulting output to the screen, printer, e-mail, or file. Then press [F1 - Process] to continue.



Step 13: Review Results, Optionally Select New Output

The default output is a patient call-back list, with custodian information, on the screen:

Achey, Diane	Custodian: Jeremy Achey	Phone: 802-474-7187
575 Old Ford Drive	Cabot, VT 05647	
Addington, Michael	Custodian: Jeffrey Addington	Phone: 802-130-6763
730 Grandview Drive	Saint Albans Bay, VT 05481	
Aftosmes, Lais T.	Custodian: Cheryl Aftosmes	Phone: 802-290-3167
Saint Albans Bay, VT	05481	
Alwine, Kyle	Custodian: Dawn Sweigart	Phone: 802-778-1654
83 Jury Street	Ely, VT 05044	
Amos, Dustin	Custodian: William I Amos	Phone: 802-380-2702
5735 Mapledale Road	Putney, VT 05346	
Anderson, Jennifer M	Custodian: Debra Anderson	Phone: 802-413-9166
734 North Street, Apt 5	Websterville, VT 05678	
Andrus, Eric	Custodian: Richard Andrus	Phone: 802-911-3478
46 Bonnywick Drive	Newport, VT 05855	
Ardire, Adrian	Custodian: Gerald Ardire	Phone: 802-327-8692
866 South OTh Street	Westfield, VT 05874	
Arndt, Chris	Custodian: Kevin Arndt	Phone: 802-453-8438
576 E Water Street	Richford, VT 05476	
Atnip, Andrew	Custodian: Connie Atnip	Phone: 802-782-5029
760 Snyder Drive	Hartland Four Corners, VT 05049	
Atnip, Melissa	Custodian: Connie Atnip	Phone: 802-782-5029
760 Snyder Drive	Hartland Four Corners, VT 05049	

Press **F12** or **F4** to select a different output. Press **F12** twice to return to the Criteria screen and add or change recall criteria.

For more information and a complete manual to the Recaller, visit learn.pcc.com.

2. Recall Patients for Physicals

Reminding patients and families about their physicals is good for your patients and good for your practice. The Recaller can produce phone lists, form letters, and mailing labels for patients who are overdue for a physical or have a physical due date coming up soon.

Read the steps below to learn how an office could recall for physicals.

Step 1: Add Physical Due Date Criteria

After running the Recaller, select the "Include by Date of Physical Due" for a physical criteria. You can search for it by entering "*due*", as shown.

Recaller - Criteria Selection

Build a list of patients based on the following criteria:

due



Recaller - Criteria Selection

Build a list of patients based on the following criteria:

Include by Date of Physical Due



Recaller - Select Dates Question 1 of 1

Include by Date of Physical Due

where the physical due date is between
 mos in the past and mos in the future
 calculated from today

Press to use specific dates (mm/dd/yyyy)

Next

Specific
Dates
Back

Enter a 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.

Note: 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. You can also change a patient's physical due date in the Patient Editor (**notjane**).

Step 2: Add Last Visit Date Criteria to Find Active Patients

Use the Last Visit criteria to limit your recall to active patients, those who have visited your practice in the past three years or so.

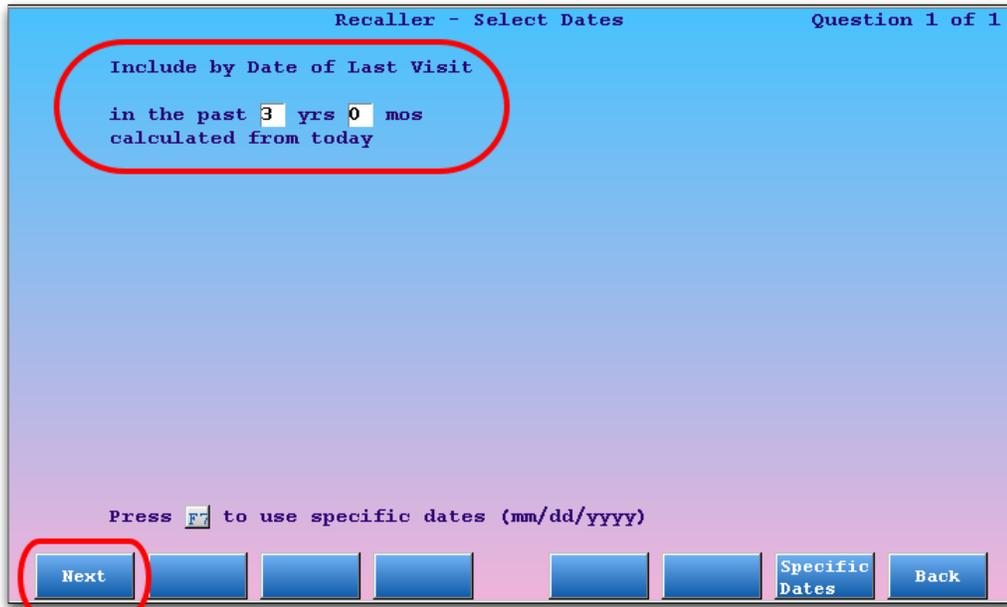
Recaller - Criteria Selection

588 Patients
 469 Guarantors associated with these Patients
 471 Custodians associated with these Patients

Build a list of patients based on the following criteria:

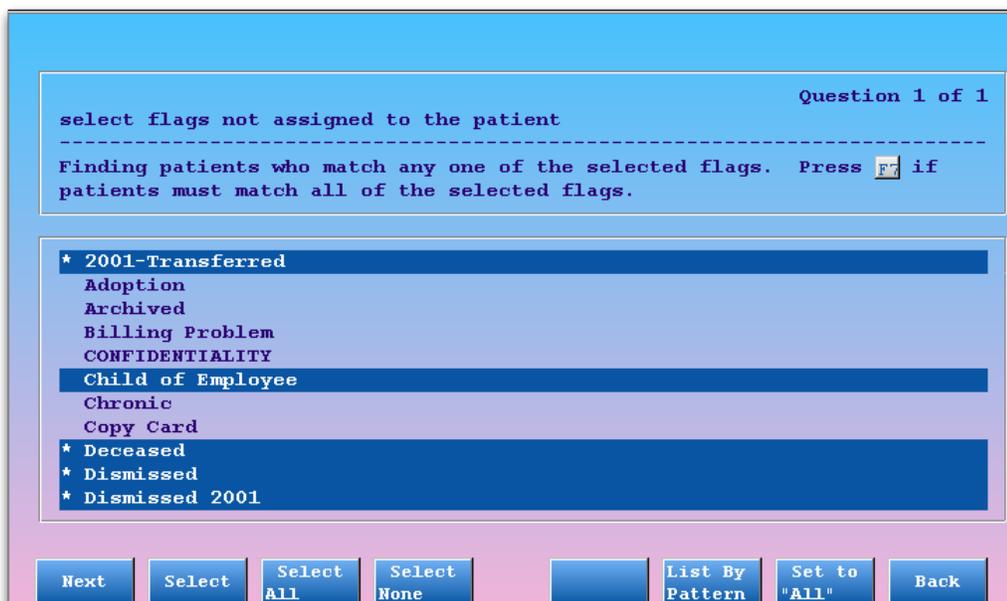
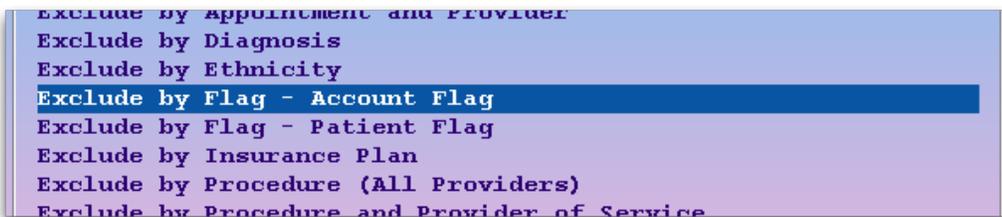
Include by Date of Physical Due
 and





Step 3: Add Account and Patient Flag Criteria to Exclude Removed Patients

Use the two "Exclude by Flag" criteria to remove Inactive, Dismissed, Deceased, or other sets of patients or accounts that you do not want to include in your recall.



You can also use the Exclude by Flag criteria to remove patients and families who have asked not to be contacted. Read Exclude Patients From Recaller and Notify to learn more.

Step 4: Add Exclude by Appointment Criteria to Avoid Patients with Upcoming Appointments

Since you don't want your Recaller output to include patients who already scheduled an upcoming physical, select the "Exclude by Appointment" criteria. Then enter a date range and select all physical visits.

```
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)
```



```
Recaller - Select Dates Question 1 of 2

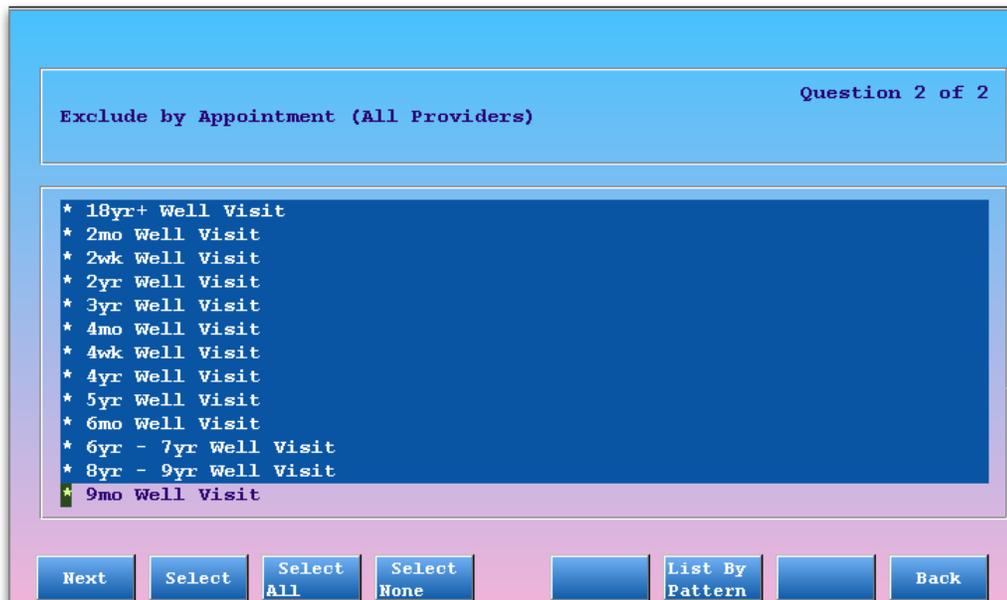
Exclude by Appointment (All Providers)

in the next 3 mos
calculated from today

Press F7 to use specific dates (mm/dd/yyyy)

Next [ ] [ ] [ ] [ ] [ ] Specific Dates Back
```



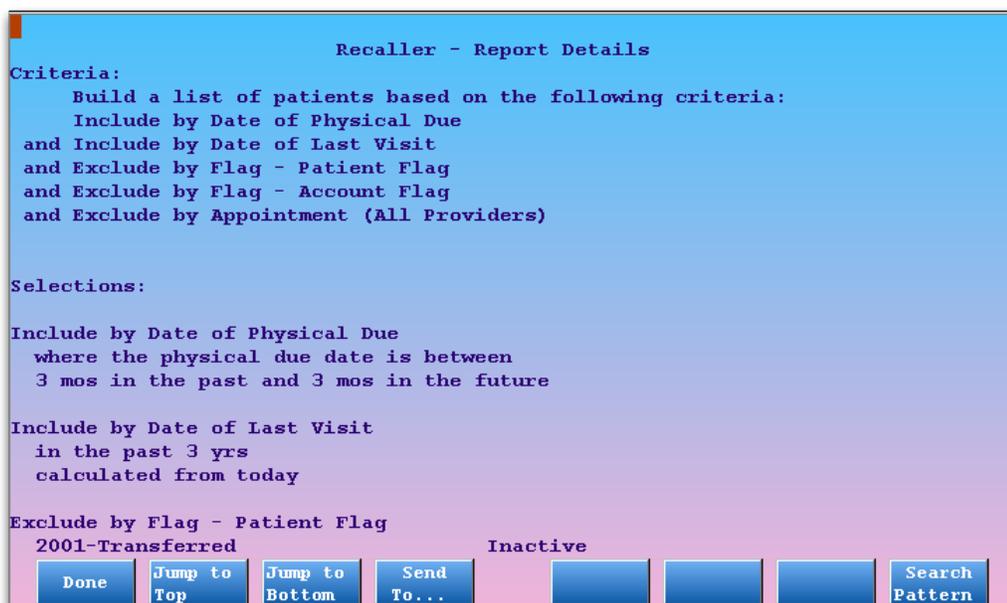


Step 5: Optional: Add Additional Criteria

You may also choose to limit your well child recall to certain geographical locations (by zip code), primary care physician, or other criteria.

Step 6: Optional: Review Criteria

At any time, press [F5 - Report Info] to review the specific details you have entered for each criteria in your recall.



Press [F1 - Done] to continue.

Step 7: Optional: Save Your Physical Recall for Later Use

You can save and restore your criteria settings for a report so you will not have to rebuild them whenever you run a physical recall. Press [F4 - *Save Criteria*] from the criteria screen, enter a name, and press F1.

For a complete guide to re-using Recaller report sets, read *Saving and Restoring Recaller Settings*.

Step 8: Select Output, Finish Recall

Press [F2 - *Output*] and select your output. You can produce custom form letters, mailing labels, or a simple contact list. For a complete guide to Recaller output, read the *Recaller Output Reference*.

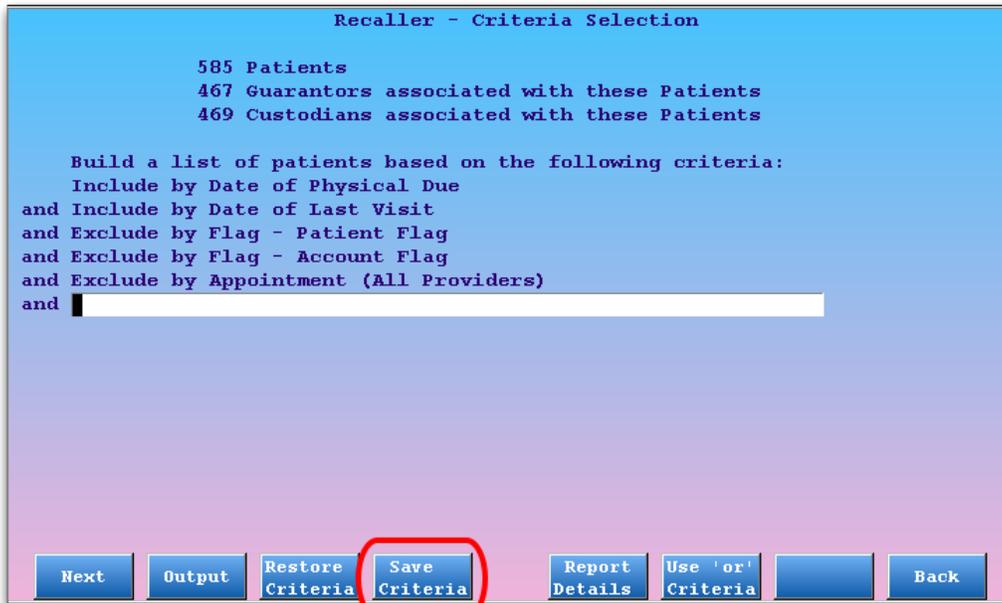
3. Save and Restore Recaller Settings

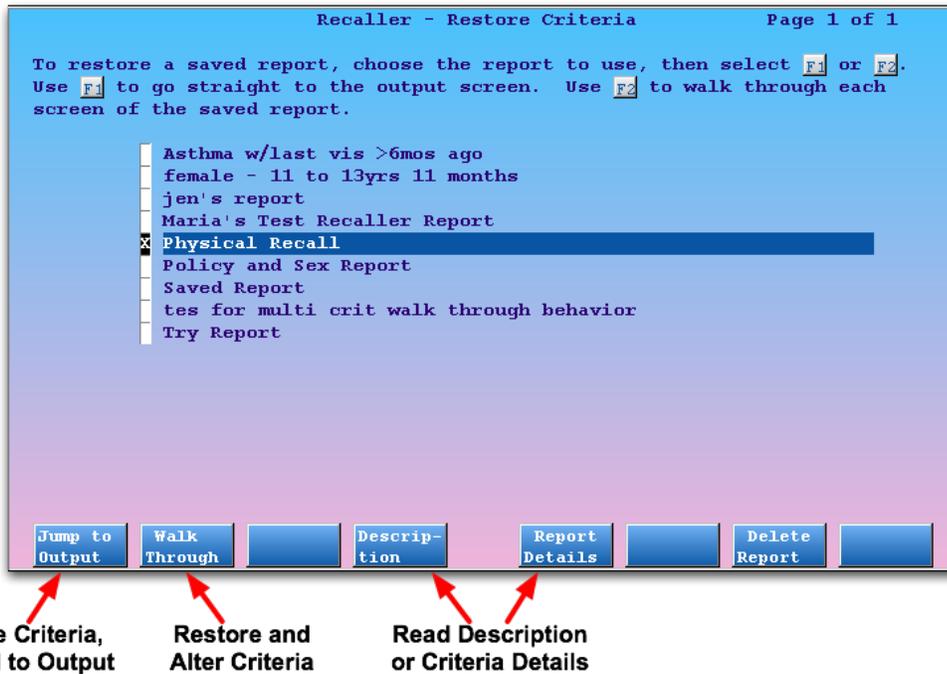
You can save, and later restore, complex sets of report criteria for the Recaller. The Recaller has a wide range of criteria, with thousands of possible criteria combinations. After setting up a recall report, you may wish to save the criteria. When you return to the Recaller later, you can restore your old criteria, tweak any slight adjustments (such as a date range or type of patient to recall), and re-run the output.

Relative Dates: Many of the Recaller's date-specific criteria use relative dates. For example, if you use the "Last Visit Date" criteria, the report will calculate for the number of days from whatever date you run the report. Since relative dates will keep your reports current and accurate, many types of reports can be saved and restored.

3.1. Save a Recaller Report

After entering your report criteria, press [F4 - *Save Criteria*] and enter a name and description to save your report.





Arrows for the two options, one is "Restore Recall Criteria, Jump to Output", "Restore and Review/Alter Criteria"

Choose from your list of criteria and then press [F1 - *Jump to Output*] to proceed to the report's output.

Which Report Did I Want, Again? If you have trouble discerning the report you wish to restore, you can select one and press [F4 - *Description*] to review the description or [F5 - *Report Details*] to read the details of the criteria settings.

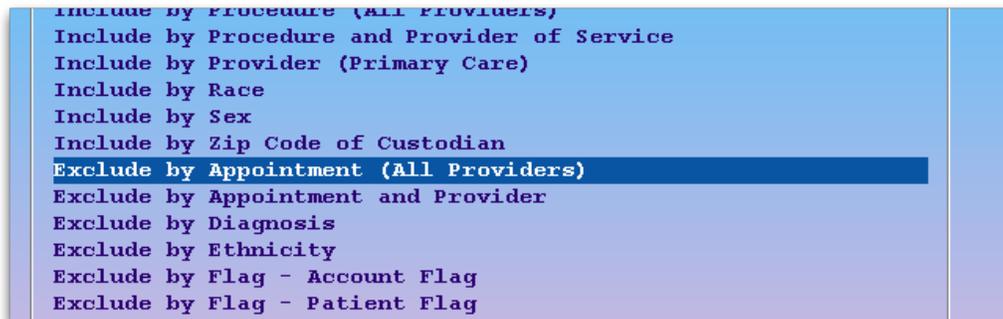
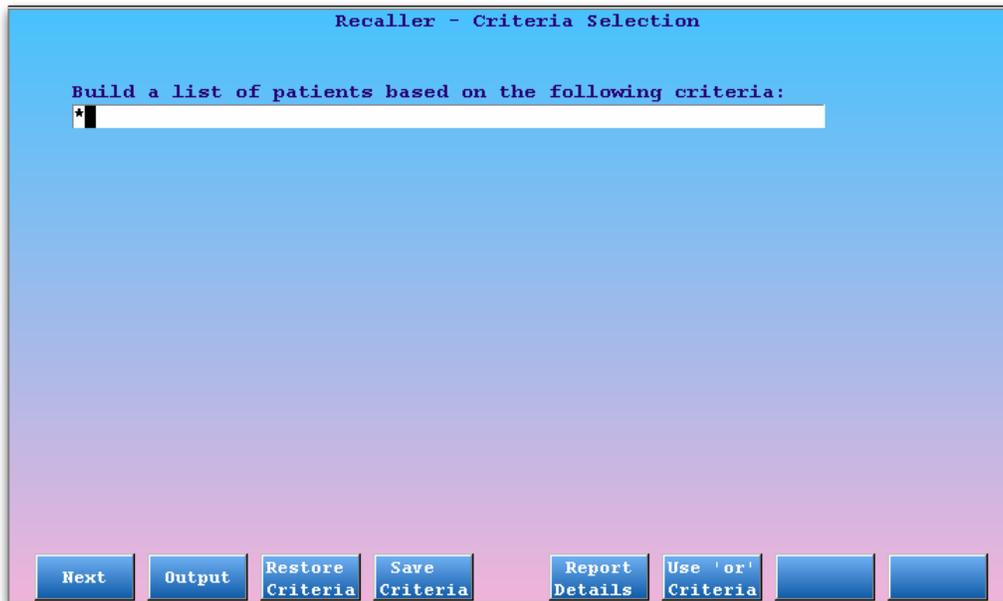
Walk-Through Instead: If you want to restore a report and then tweak it, making slight changes to the criteria used for the recall, press [F2 - *Walk Through*] instead of F1. You will see the list of the recall's criteria. You can then use [F1 - *Next*] to walk through each criteria and adjust dates or selected items.

Delete Old Reports: Select any Recaller report on the Restore Criteria screen and press [F8 - *Delete*] to delete it.

4. Recaller Criteria Reference

When you run the Recaller, you begin by adding one or more criteria to limit the output. The criteria determine which patients will be part of your recall.

How do each of the Recaller criteria work? What would each one be useful for? The catalog of criteria options below explains the purpose and effect of each criteria, as well as how to fill them out.



Selecting and Searching for Criteria: You can use an asterisk to see a list of all available criteria. Criteria are listed in alphabetical order, separated into "Include by" and "Exclude by" lists.

You can also search for a criteria by surrounding a search term with asterisks (i.e., enter "*due*" to search for criteria with the word "due" in the description).

You can add several different criteria, building a more and more refined list of patients for your recall. For examples of selecting and entering criteria, read the Recaller Quickstart or the Recall Patients for Physicals help articles.

4.1. Age

Select the age criteria in order to limit your recall according to patient's age or date of birth.

When you select the age criteria, the Recaller will prompt you to enter an age range.



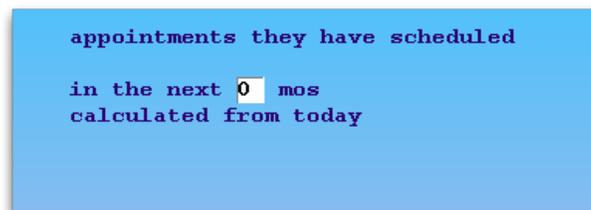
Optionally, you can press [F7 - *Specific Dates*] to enter a birth date range.

Uses: The age or birth date criteria can create a list of all patients of a certain age. You could use this criteria to recall certain patient age groups for flu shots or other services.

4.2. Appointments

Select an appointment criteria to include or exclude patients based on appointments in the Partner scheduler, either for any provider or a specific provider.

When you select an appointment criteria, the Recaller will prompt you for an appointment date range and a visit reason or reasons.





Use Select All: You may only care about a patient's appointment date, regardless of the visit reason. Note that you can use the Select All function on the Visit Reason screen to remove that item from the Recaller's filtering.

Uses: An appointment-based recall helps you exclude patients with scheduled appointments from physical reminders. You could also find all patients who are scheduled for a certain visit reason.

4.3. Appointments (or Procedures) By Provider

You may wish to see a list of all patients who have had certain procedures or appointments *with a specific provider or providers*. Use the "By Provider" criteria in the lists.

These criteria work like the procedures and appointments criteria, described in the sections above, except that the Recaller will also ask you to specify which providers should cause the patient to be included or excluded from the recall.

Uses: You can use these criteria to create a list of all the patients a certain provider performed a Well Child diagnoses for, or find out how many recheck visits are in the schedule for a certain nurse.

4.4. Birthday (next)

Use the upcoming birthday criteria to find patients with birthdays occurring within a specified future time frame.

When you select this criteria, the Recaller will ask you how far forward it should look when collecting birthdays.



Optionally, you can press [F7 - *Specific Dates*] to enter a birthday date range.

Uses: You could use this criteria to send birthday cards.

4.5. Date Added to Partner

Select the Partner date criteria to recall patients based on when they were added to the Partner system.

When you select this criteria, the Recaller will prompt you to enter a time frame.

Recaller - Select Dates Question 1 of 1

the date they were added to the Partner system

in the past 0 yrs 0 mos
calculated from today

Press **F7** to use specific dates (mm/dd/yyyy)

Next [] [] [] [] Specific Dates Back

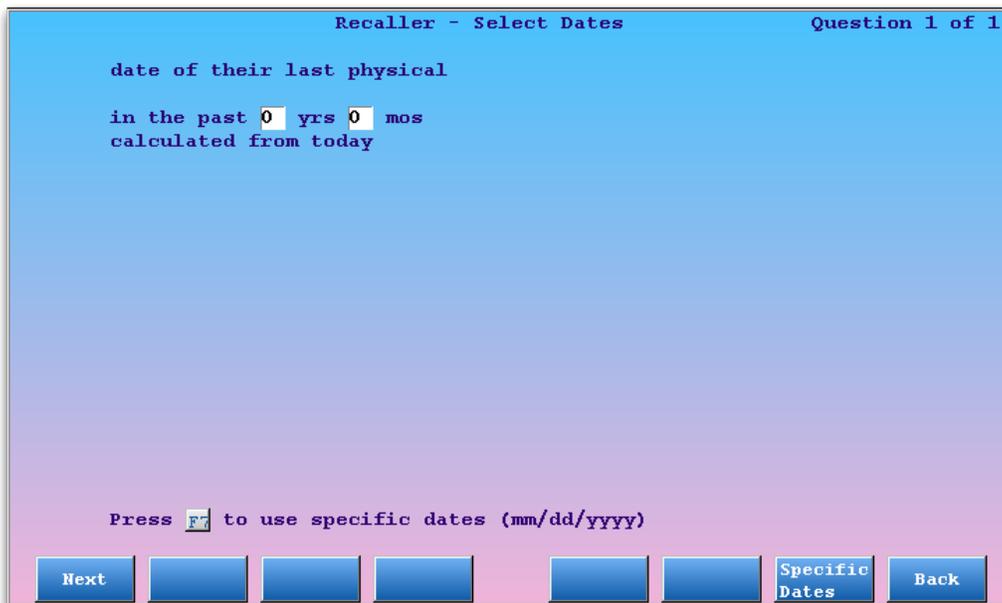
Optionally, you can press [**F7** - *Specific Dates*] to choose a precise date range.

Uses: This criteria can help you find new patients or families, regardless of their visit history. You could create a list of all patients added to your Partner system in the past year. During a data conversion from another billing system, this recall criteria could list precisely those patients added to your system on a certain day.

4.6. Date of Last Physical

You can build a list of patients based on the date of their last physical.

After selecting this criteria, the Recaller will ask you to input a range of time within which the patient's last physical must have occurred to be included in the recall.



Optionally, you can press [F7 - *Specific Dates*] to enter a specific date range instead of a time relative to today.

4.7. Date of Last Visit

Select the patient's last visit date criteria in order to limit your recall to all patients who were seen within a specified time frame.

When you select this criteria, the Recaller will prompt you to enter a length of time to search for past patient appointments.



The Recaller will run a search relative to today (the time you run the report) and include patients with visits in that time period. Optionally, you can press [F7 - *Specific Dates*] and enter a precise date range.

the date they were last seen
between 04/10/10 and 05/10/10

Uses: The visit date criteria is often used to limit a recall to *active* patients, as determined by those who have visited your practice within the past three years. You could also use it to create a list of patients whose last visit was several years ago so that their charts may be archived.

4.8. Date of Physical Due

Select the physical due date criteria in order to limit your recall according to a patient's physical schedule.

When you select the physical due date criteria, the Recaller will prompt you to enter a time frame for when the patient's next physical is due. Keep in mind that this may include both patients who are overdue for a physical or will be due for one soon.

whether they are due and/or overdue for a physical
where the physical due date is between
0 mos in the past and 0 mos in the future
calculated from today

Note: Partner enters a "Due Date for Next Physical" into a patient's record when their guarantor is billed a Well Child procedure during checkout. It uses a customizable physical schedule for your office, originally based on the AAP's recommendations. Run the Patient Editor (**notjane**) to see any patient's next physical due date.

Uses: The physical criteria can help you find all patients who are overdue for a physical or have a physical due during the coming months. You can use the Recaller to print mailing labels for reminder postcards.

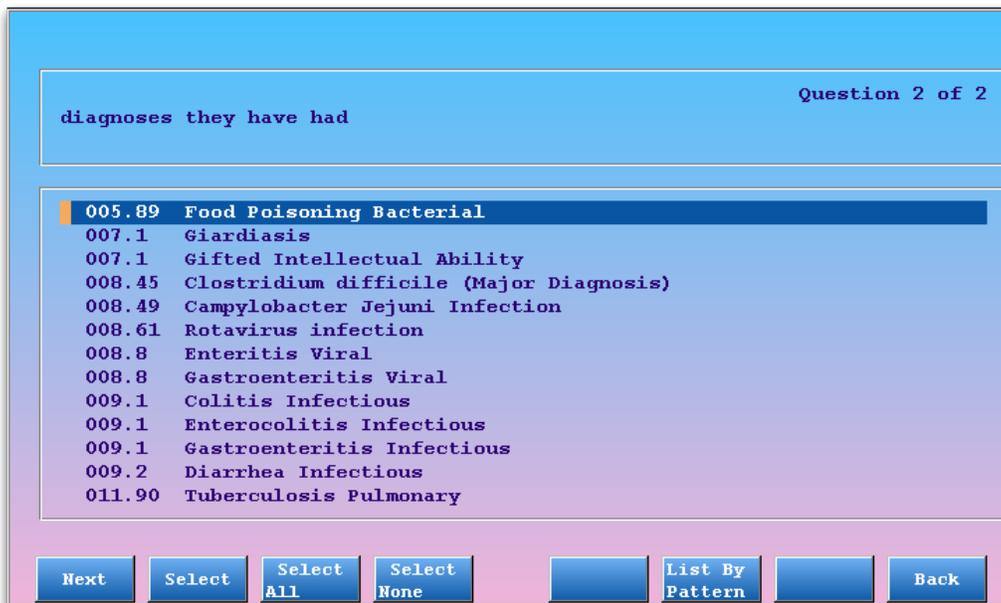
4.9. Diagnoses

Select a diagnoses criteria to include or exclude patients who have received certain diagnoses.

When you select a Diagnoses criteria, the Recaller will prompt you to select a date range and then a diagnosis or diagnoses.

diagnoses they have had
in the past 0 yrs 0 mos
calculated from today



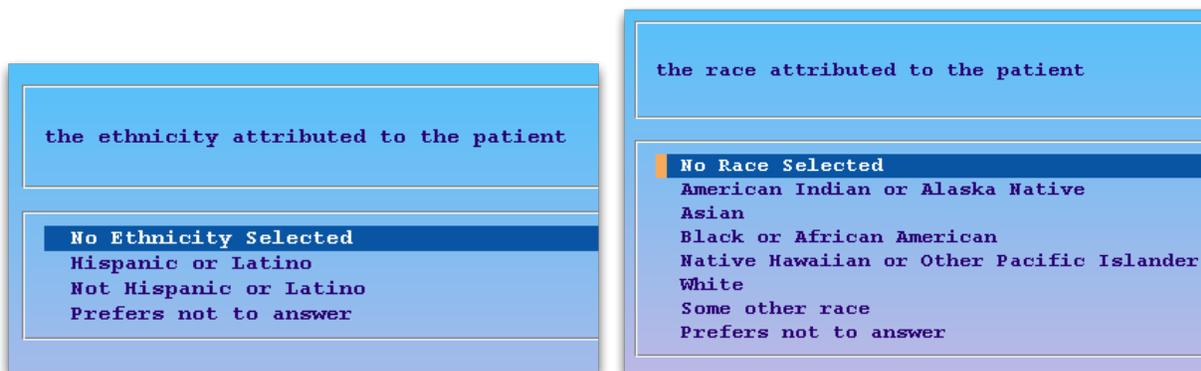


Uses: A diagnoses recall is ideal for finding all asthma patients, all ADD patients, or all patients suffering from any other diagnoses, in order to remind them of services or opportunities. You could also run a recall using a list of diagnoses to remind high-risk patients of a flu clinic.

4.10. Ethnicity, Race

Use the ethnicity and/or race criteria to limit your recall to specific ethnicity or race, based upon the U.S. Federal Government's standard values.

The Recaller will ask you to select races/ethnicity to include or exclude.

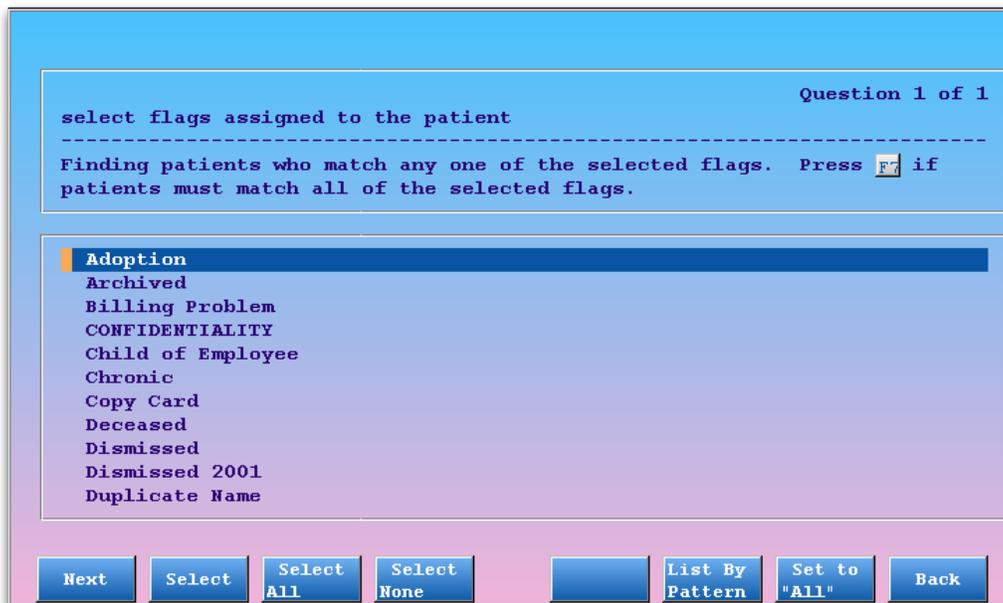


Note: Race and ethnicity are stored in the Patient Editor (notjane). These criteria will only be useful if your practice collects this information.

4.11. Flags, Account or Patient

Select one of the four status flag criteria to filter Recaller results by patient or account status flags. You can include or exclude by patient or account flags.

When you select any of the status flag criteria, the Recaller will prompt you to select the flags.



Any, or All? By default, when you are including patients by flag, *any* of the selected flags will cause them to be included in the recall. When you are excluding by flag, the Recaller will knock them out of the recall if they have *any one* of the selected flags. You can change these default behaviors by pressing [**F7** - Set to All/Any]. For example, if you want to recall patients who are both Special Needs and Referred, you would select both flags and then press **F7** to indicate that patients needed *all* flags to be included in the recall.

Auto-Selected: You may notice that certain status flags are already marked for exclusion by default. You can set the default behavior for excluding flags in the Table Editor (**ted**).

Uses: Status flags are used to categorize and mark accounts and patients for a wide variety of reasons, any of which may be a good reason to recall a patient or exclude them from a recall. If a patient record is flagged deceased, dismissed, or transferred, for example, you would want to exclude them from a physical reminder recall. You could also use the Recaller to send a form letter to all accounts flagged "Collection", or to exclude all families that have asked not to receive recall messages.

4.12. Insurance Plan

Select an insurance plan criteria in order to limit your recall to all patients who have (or do not have) specific insurance plans.

When you select an insurance plan criteria, the Recaller will prompt you to select a plan or group of plans.



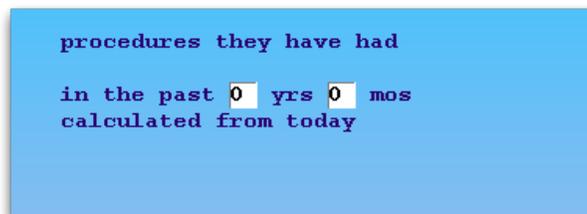
Use function keys at the bottom of the screen to select individual plans, all plans, deselect all plans, list and select plans by insurance group, or search for a plan.

Uses: You may need to contact all families under a certain insurance plan to inform them of a change in policy or that you are dropping the plan. You may wish to inform your patient population of a new service, but only inform patients with insurance policies that permit the service.

4.13. Procedures

Select a procedure criteria to find or exclude patients who received (were billed for) certain procedures.

When you select a procedures criteria, the Recaller will prompt you to select a date range and a procedure or procedures.



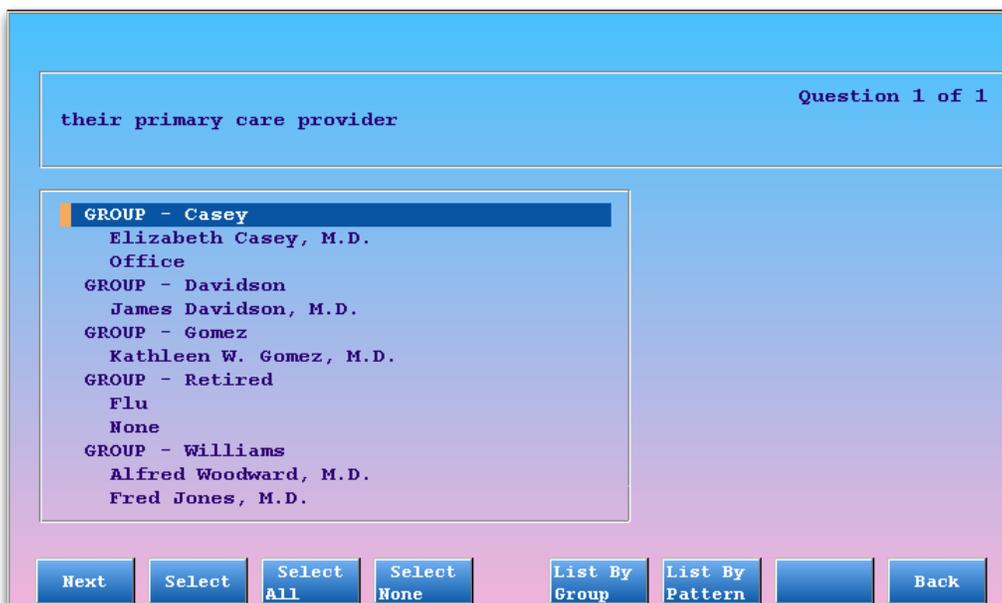


Uses: A procedure recall is ideal for performing an immunization recall when you discover a bad immunization lot. You could also combine the exclude procedure criteria with the "Patient's Date of Birth" criteria to find all patients of a certain age who have not received a specific immunization or other recommended procedure.

4.14. Provider (Primary Care)

Select the primary care provider criteria to include only a specific provider's (or providers') patients in a recall.

When you select this criteria, the Recaller will prompt you to select providers or provider groups.



Note: Primary care provider information is stored in the Patient Editor (notjane). This criteria will only be useful if your practice assigns this information.

Uses: Add this criteria to limit your recall to a subset of your providers. You may need to inform all of a

provider's patients that a physician has new office hours or that he or she is retiring.

4.15. Sex

Select the sex criteria to find only male or female patients.

When you select the sex criteria, the Recaller will prompt you to select male or female patients.

Which gender to include?

Include Female Patients.

Include Male Patients.

Uses: You can limit any recall, for any reason, to one gender or the other. You could use the sex criteria to send Gardasil information, for example.

4.16. ZIP Code of Custodian

Select the ZIP code criteria to find patients living in a certain area.

When you select the ZIP code criteria, the Recaller will prompt you to enter a ZIP code or ZIP code range.

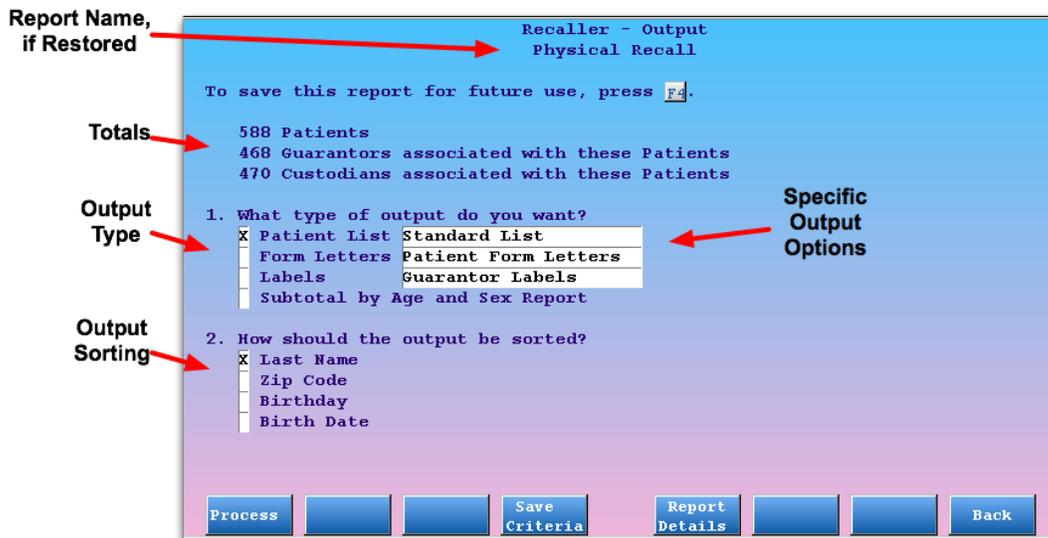
the custodian's zip code

Range is between 00000 and 99999 .

Uses: A ZIP code recall could help you notify families and patients of regional issues, such as a new office location or new city and state ordinances.

5. Recaller Output Reference

After selecting criteria or restoring a saved Recaller report, use the Output screens to specify what you will generate with the Recaller results. You can create patient lists, form letters, mailing labels, or a subtotal report.

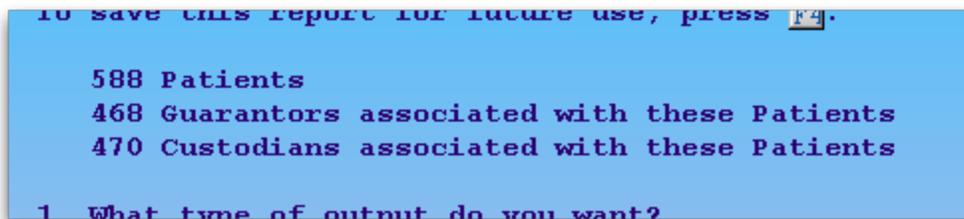


After selecting an output type and a sorting method, press [F1 - Process] to proceed to additional output questions or the final output selection screen.

Details on each section of the Output screen and options, along with information about the additional questions or screens for each output type, appear in the reference below.

5.1. Totals

The top section of the screen indicates report totals. Since the Recaller finds patients by both patient and family characteristics, it lists patient, guarantor, and custodian totals. These numbers will differ because some families have more than one patient meeting your recall criteria, and patients may have different custodians and guarantors.



5.2. Recaller Output Types

The first question on the Output screen asks what type of report output you wish to generate.

```

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

```

5.2.1 Patient Lists

A patient list includes basic information about each found patient. You might use a patient list to contact a list of patients by phone, or export the list to another program or an auto-calling system.

After checking off "Patient Lists", use the asterisk (*) to select the specific patient list.

```

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

```



```

Standard List
Newborn Referral Info List
School Nurse Meds List
Medical Records
Transfer List

```

Customize Patient Lists: Patient lists work just like form letters, described below, except that they use only a line or two for each patient.. You can create a patient list using **waffle**, including any text and patient or account variables. PCC Support can move your custom lists from the form letter section to the list section.

5.2.2 Form Letters

You can output a form letter for each patient found in your Recaller results. Select the Form Letters option, and then choose which list of form letters to select from.

```

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

```



```

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

When you press [F1 - Process], the Recaller will prompt you to choose a specific form letter and may ask you form-letter specific questions.

Page 1 of 1

FORM GENERATOR Doctors Office

- Medical Records
- Referral/Newborn Letter
- School Nurse Meds Admin
- School/PE Excuse
- Sports Form
- Termination - Missed Appt
- Transfer Form
- Physical Reminder Letter

Custom Form Letters: You can create, edit, and share form letter templates using the **waffle** program.

5.2.3 Mailing Labels

You can create printable labels, formatted to standard Avery sizes or your own custom label. Select the Labels output, and then indicate whether you want one label for each patient, custodian, or guarantor.

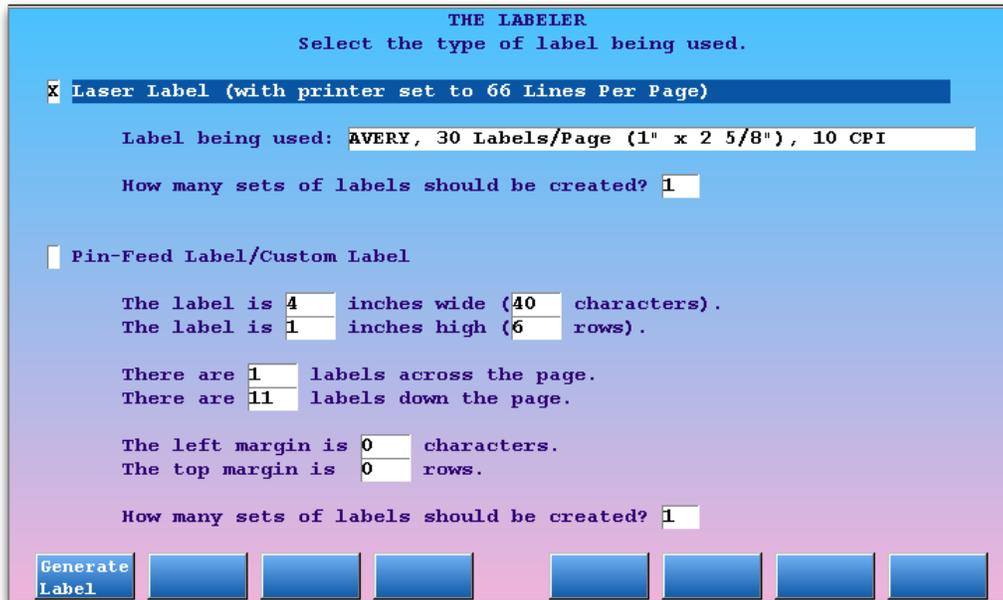
```

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





When you press [F1 - Process], the Recaller will prompt you to select or design your label.



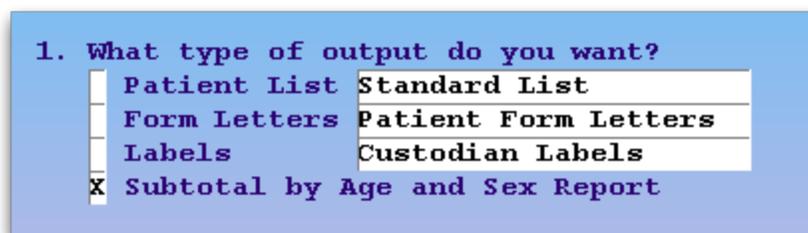
Laser Labels: Select the Laser Labels option, select your Avery label, and put the labels in your printer's drawer or manual feed. Note that your printer should be configured to 66 lines per-page. PCC Support configures all printers to 66 lines per-page during our installation visit to your office, but you may want to create a test recall with only a few patients before printing a large batch.

Pin-Feed or Custom Labels: Select the Pin-Feed Labels option, enter your label dimensions, and load the labels into your printer.

Multiple Sets: If you need two or more copies of each label, enter a number for the "How many sets of labels should be created?" question under the Laser Labels or Pin-Feed Labels sections.

5.2.4 Subtotal By Age and Sex Report

Sometimes, instead of contacting a list of patients, you may wish to view detailed totals of the patients found by your Recaller criteria. Select the Subtotal By Age and Sex Report and press [F1 - Process].





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

5.3. Recaller Sorting Options

After selecting your output type, you can indicate a sorting method. You can sort the output, whether it is a list or a stack of form letters, by last name, zipcode, birthday or birth date.

2. How should the output be sorted?

- Last Name
- Zip Code
- Birthday
- Birth Date

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.

5.4. Output Selection

After choosing an output, pressing [F1 - Process], and answer any additional questions. The Recaller will display the standard Partner Output Selection screen.

Recaller - Output Selection

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

You can view the results on the screen, send them to a specific printer or e-mail address, or save the results to a computer or the **srsfiles** program. You could also review items on the screen first, and then press **F12** or **F4** to return to these options and send the output to the printer.

For more information about the Partner default Output Selection screen, read Report Destination Selection, available at <http://learn.pcc.com>.