



CHECK LIST

(v5.00.37 – some features may vary if using a previous version)

Patient Recall List

- Go to “Reports / Query” menu > “Quick Reports tab” > “Patient” tab
- Change “Select Report Date Range” to from and to dates of the last charge (DOS) for a patient.
- Select “Patient Recall Report”
- Create a PDF or Print the report

There is an “Exit Preview” button at the top of the screen, if that is clicked 3 times you will be able to roll over the patient name, which when clicked will bring up the patient demographic account to view or add a patient status etc.

- The “Patient” and “Claim” tabs under Quick Reports allow for the “Exit Preview” process above.