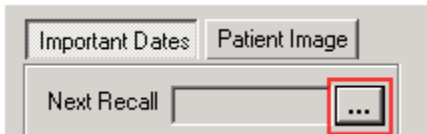


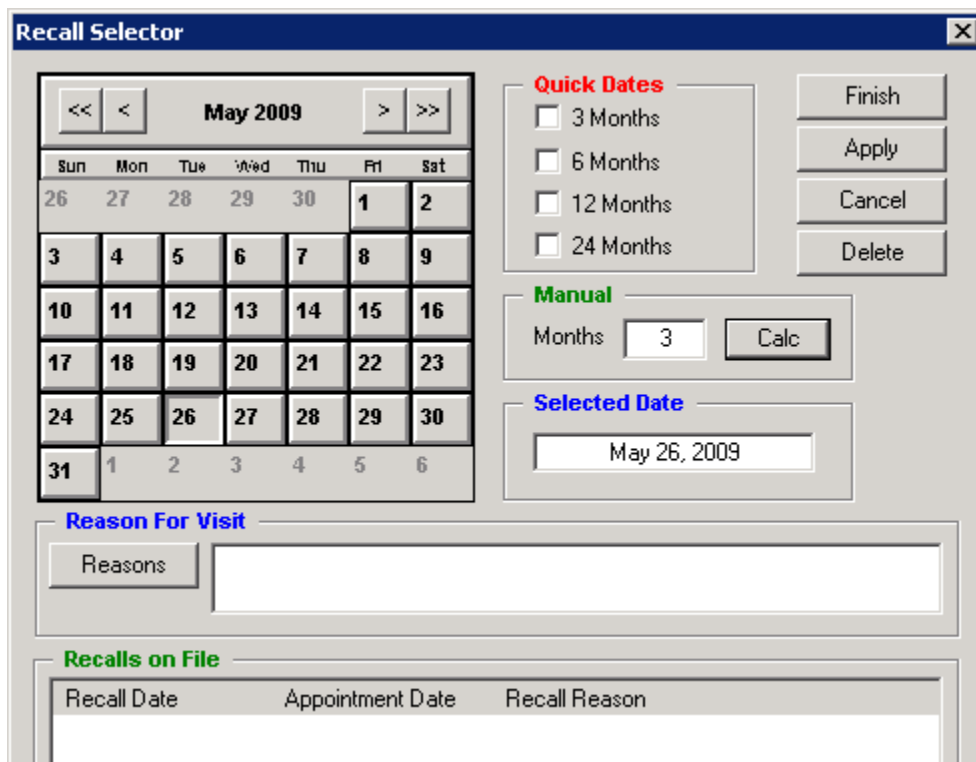
## Working with Patient Recalls

### To Create a Patient Recall

1. Browse for and make patient active
2. Click Browse button next to Next Recall date under Important Dates



3. Select Date using either the Calendar, Quick Dates or Manual method.

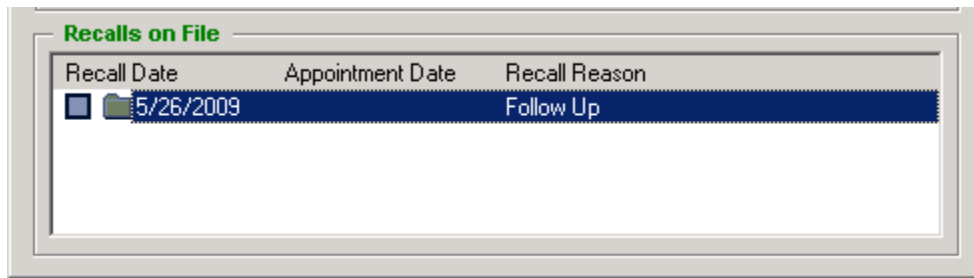


- a. To use the manual method, enter number of months and click Calc.
4. Verify date in Selected Date field
5. Click Reasons button
6. Select Reason(s)
  - a. If required, select multiple reasons depending on the provider's request.
  - b. To add a new or edit an existing reason, select category and either enter a new reason or select an existing reason, make your edits and click Add/Save
7. If necessary, add additional text
8. Click OK
9. Click Apply

10. Click Finish to close window

### To Delete a Patient Recall

1. Browse for and make patient active
2. Click Browse button next to Next Recall date under Important Dates
3. Highlight Patient Recall to Delete



4. Click Delete
5. Click Yes when you receive the following message, "Are you sure you wish to delete the selected recall?"
6. Click Finish, Cancel or close window.

Please refer to the [OD Professional – Printing Recall Reports, Letters and Labels](#) job aid.