OP | Webinar Resource Handout:

Leveraging Your Demographic Data Using Demographic Analysis and Recall (DAR)

Scenario #1: Create a Patient Demographic List

Path: Practice Management tab > Demographic/Analysis Recall > Patient Demographics tab

1. Navigate to the **Patient Demographics** tab of the Demographic Analysis/Recall Report by following the path above.
2. Make a selection from the **Visit Dates** options.
3. Select one or more options to determine **which patients to include**: active only, patients with future appointments, or to exclude patients with appointments.
4. Click the **Search** button.
5. *(Optional)* Add or remove columns from the grid using the **Show/Hide Visible columns** button.
6. *(Optional)* **Sort**, **filter**, or **group** the data.
7. Take action using the **Print Letters**, **Send Messages**, or **Export** buttons. Or, proceed to the appropriate Recall tab to run recalls for the patients in the grid.

Scenario #2: Identify how many active patients are 5 years old.

Exercise A: Sort Patient Demographic List (PDL)

1. Using the PDL you created, we will sort the active patients.
2. In the age column, check off "5"

Outcome:
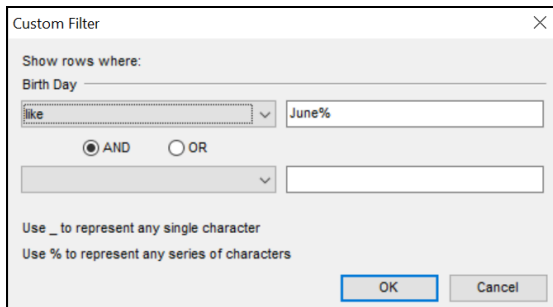How many 5-year-olds do you have?

_____

Exercise B: How many of the 5 year olds are due for a well visit?

After creating the Patient Demographic List
1. **Select: Care Plan Recall > Preventative Exam**

Outcome: Patient due for a well visit

Scenario #3: How many active patients have a Birthday in a specific month?

Exercise A. Creating List
1. Practice Management--> Demographic Analysis and Recall
2. Create Demographic List
   a. No Date Restriction
   b. Active patients only
3. Search
4. Birth Day column: Click on the filter icon like should be selected and now we will type in the Birth month with %June%, click OK.

Custom Filter

Show rows where:

Birth Day

like ∨ | June%

◉ AND ○ OR

∨ |

Use _ to represent any single character
Use % to represent any series of characters

OK   Cancel

5. You will now see a list of patients that have birthdays in June

Exercise B. Take Action by sending Messages via PMX

Recalls using Patient Message eXchange

1. In the Demographic Analysis/Recall Report window, click the Send Messages button. The Patient Message eXchange window is displayed.
2. In the Patient eXchange window, use the drop-down arrow in the Search box to select the message to send out.
3. Click the Sort Groups button.
4. Click the Create Msgs button.

If you do not have a message for this recall item, create a new message.

Recalls using Patient Message eXchange - Create Message

1. Click the Blue + next to the search drop down
2. Name the Message in the List Name field
3. Select a Message Purpose in the drop-down
4. Enter a Telephone, Email, and Text Message in the appropriate tabs
   a. Hint: You can copy from a similar recall message for each type and then just edit to the specifics of this recall
5. Click the Green check to save

Scenario #4: How many active patients have asthma and haven't been to the office in the last 6 months?

Exercise A. Creating List
1. Practice Management--> Demographic Analysis and Recall
2. Create Demographic List
   a. One visit in the last 3 years
      i. Note: (We use this date because anything past 3 years when they return to the office it would be considered a new patient visit)
   b. Active patients only
   c. Search

Exercise B: Clinical Recall Tab
1. **Select Asthma Diagnoses**
2. **Search**
3. **Find or add the "Last Visit Date" to the grid**
   a. **Hover and click the funnel icon to bring up filter options**
   b. **Click Custom**
   c. **Set the operator to Less than or equal to and enter a date 6 months previous**

Exercise C. Take Action by sending Messages via PMX

Recalls using Patient Message eXchange
1. In the Demographic Analysis/Recall Report window, click the Send Messages button. The Patient Message eXchange window is displayed.
2. In the Patient eXchange window, use the drop-down arrow in the Search box to select the message to send out.
3. Click the Sort Groups button.
4. Click the Create Msgs button.

If you do not have a message for this recall item, create a new message.

Recalls using Patient Message eXchange - Create Message

1. Click the Blue + next to the search drop down
2. Name the Message in the List Name field
3. Select a Message Purpose in the drop-down
4. Enter a Telephone, Email, and Text Message in the appropriate tabs
   a. Hint: You can copy from a similar recall message for each type and then just edit to the specifics of this recall
5. Click the Green check to save

Scenario #5: How many of my patients are due for a flu shot?

Exercise A. Creating List
1. Vaccine Status Recall
2. Forecast Status: Behind or Due
3. Vaccine Group: Flu- Seasonal
4. Search

Exercise B. Take Action by sending Messages via PMX

Recalls using Patient Message eXchange
5. In the Demographic Analysis/Recall Report window, click the Send Messages button. The Patient Message eXchange window is displayed.
6. In the Patient eXchange window, use the drop-down arrow in the Search box to select the message to send out.
7. Click the Sort Groups button.
8. Click the Create Msgs button.

If you do not have a message for this recall item, create a new message.

Recalls using Patient Message eXchange - Create Message

6. Click the Blue + next to the search drop down
7. Name the Message in the List Name field
8. Select a Message Purpose in the drop-down
9. Enter a Telephone, Email, and Text Message in the appropriate tabs
   a. Hint: You can copy from a similar recall message for each type and then just edit to the specifics of this recall
10. Click the Green check to save