Recalls Report

Version: 1.00 | Last Modified on 08/01/2026 2:59 pm AEDT

The Recalls Report is used to print or SMS send the First Recall letter or the recall Reminder Letter, and to print a report for doctors to review prior to their letters going out.

The report is a mail merge program that's used to print reports of patients who have recalls maturing within a selected date range, and in order to print the Recall Letters, the workstation used must have Microsoft Word installed on it.

A standard Recall letter can be setup through Microsoft Word with your letterhead using the WP Setup/FRM Documents/Mail Merge function. The same letter is used for the First and Reminder letters, the only difference being the body of the letter (the Recall Content) which is inserted from the Recall Type forms (of Practice Setup/Recall Types).

To learn more about recalls, see the Admin section.

To open the Recalls Report:

1. Go to Zedmed's **Management** tab.
2. Select **Reports > Recalls**.

    The **Recall Report** screen will open.
3. Select or update the required **Style**, **Data**, **Criteria** and **Recall Type** fields.

    - It is important to select the **Maturity Date** range with due care. You can always print a list of those recalls still active (Unattended) for the previous month, or the month before that, just by varying the dates back one or two months.
    - If you leave the **Treating Doctor** as All, just one report will print out but it will be grouped by individual doctor. You can print individual pages for each doctor by running the report multiple times, once for each doctor, and select Group By Recall Type instead.
4. Select the output option:

    - **Print** to print out the report.
    - **Screen** will open the report with print and save menu options.
    - **Send SMS** to send SMS messages to patients who are set up for SMS.

        When the letters have been sent to the printer, you will be asked if you wish to update the Further Details section of Patient Details with the letter number and the date of sending – you would normally answer **Yes**.
5. Select **Close** when you have finished.

    When letters have been printed, you will have the opportunity to record the date of the letter in the original recall entry in Patient details, so you can prove that a letter was sent on a particular date.

Recall Report

Style

- ● Single Line Details
- ○ Extra Details
- ○ Letter [▼]

Mail Merge Templates

FRM Recall Letter.doc

- ○ Send Recall via SMS [▼]

[Modify SMS Text]

Criteria

Maturity Date	04/08/2021	📅	03/09/2021	📅 ☑
Creation Date	05/07/2021	📅	04/08/2021	📅 ☐

Branch [Branch 1 ▼]

Treating Doctor [<All> ▼]

Patient [👉] [   ]

Patient Status [Not Deceased ▼] Letter Generated [▼]

Activity Status [Active ▼]

Data

Group [Doctor ▼]

Order [Patient Name ▼]

Recall Type

ID	Description
☑	All Recall Types
☐	GP Management Plan - Review*
☐	Health Assessment*
☐	Mental Health Plan - Review*
☐	Pap Test

[Print] [Screen] [Deactivate these recalls] [Send SMS] [Close]