

Add a patient recall

Version: 1.01 | Last Modified on 07/04/2026 1:16 pm AEST

Recall a patient to the practice. The recalls start as Active and are set to Inactive when the patient attends, or if they do not respond to recall requests. Recalls remain as a permanent record to confirm your efforts to recall the patient for a test that may be important to their future health.

Other Recall guides

- [Scheduling SMS recall reminders](#)
- [Manually send a recall SMS](#)
- [Run the Recalls Report](#)
- [Create Recall types](#)

How a Recall works

A recall is added to a Patient Record, and the Recall Type selected determines the Recall Maturity Date, which is the period of time from the recall creation that the patient should attend the practice. Zedmed will automatically send up to three SMS reminders in the lead-up to the maturity date. When the patient arrives for the appointment, reception manually records that date in the recall, and it is recommended that they also deactivate it.

These are scheduled by the number of days before the maturity date.

Recalls can be set to repeat so that when one reaches its maturity date, another is created.

Adding a Recall

1. Open the patient's record.
2. Select the **Recalls** tab.
3. Select **New**.

The **New Recall** screen will open.

4. Select the **Doctor** initiating the recall.
5. Select the **Recall Type**.
6. Set the **Maturity Date** (which will usually default). The Letter date will automatically be set when you send recall letters.
7. Set a date if there is a Second Letter.
8. Select **Close** to save and exit.

When the patient attends, you should enter the date in the **Attendance Date** field and deactivate the entry. This may require some co-operation between the doctors and nurses in the practice and the clerical staff. Alternatively, the return of a pathology result form may be used to trigger the Attendance Date.

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Acc Enquiry Attend Bill Clinical Information Print Quote Receipt Waiting Room Appointments Extras

Patient Details

Further Details

Recalls

Notepad

eHealth

Messages

Payment Cards

Show Active New Details

Send Recall 4

Description	Created	Maturity Date	Doctor	Clinic	Status	Letter Date	Attd. Date	On Going	Notes
Team Care Arrange	24/05/2023	24/08/2023	PD	MED				Y	
Health Assessment	25/10/2023	25/10/2024	PD	MED				Y	
Mental Health Plan	25/10/2023	26/10/2023	PD	MED	1	25/10/2023		Y	
Health Assessment	8/01/2026	8/01/2027	???	MED				Y	

New Recall

Repeated

Doctor:

Recall Type:

Maturity Date:

Attendance Date:

First Letter:

Second Letter:

Recall Notes

History Close Cancel

Delete Print Patient Verification Find Close Cancel