Recall List

Obtaining Recall List

• Click the List icon on the top right hand corner in open dental



An "Appointment Lists" pop-up will appear
 Click the top button "Recall"

Appointment Lists ? X									
These lists may be used for calling patients, sending postcards, running reports, etc Make sure to make good Comm Log entries for everything. Recall Action of due dates for patients who have previously been in for an exam or cleaning									
Confirmations A list of scheduled appointments. These patients need to be reminded about their appointments.									
Planned Tracker Planned appointments are created in the Chart module. Every patient should have one or be marked done. This list is work that has been planned but never scheduled.									
Unscheduled A short list of appointments that need to be followed up on. Keep this list short by deleting any that don't get scheduled quickly. You would then track them using the Planned Appointment Tracker									
ASAP The short call list. A list of appointments and recalls where the patient is available on short notice. To show this list, the "ASAP" checkbox must be checked on the appointment or the recall									
Radiology A list of radiology orders associated to appointments that have not been marked as CPOE. This list allows providers to quickly approve radiology orders which will help meet EHR measures.									
Ins Verify A list of insurance verifications for upcoming appointments.									
Cancel									

- To populate an accurate list, be mindful of three things:
 - Make SURE the "Include Reminded" box is checked
 - Double check your date range

- Under "Clinic" make sure "All" is selected
- Click "Refresh List"

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- Have an additional Open Dental open so you can check the chart/account for any notes regarding scheduling
 - Check balances and commlogs (just in case there are reasons as to why we haven't scheduled back/also to familiarize yourself with the pt) before calling
- ★ <u>Script 1</u>
 - **Scheduler** Hello! This is (your name) from Capital Dental calling for (pt's name).
 - PT- This is she/he
 - Scheduler- I'm very happy I was able to reach you today. Our records show that your last professional cleaning and oral health exam was (date of last cleaning) As you know, your dental insurance covers at least two cleanings and exams each year, but does not carry over that benefit into the next calendar year. In other words, if the benefit is not used you lose it. Most of our patients want to

be sure to take advantage of their insurance, and we are happy to help them keep track of what they can use. Our hygienist (Hygienist's name) has time next Wednesday at 2 pm and Thursday at 9 am, which of these appointments would you prefer?

- ★ <u>Script 2</u>
 - Hi (pt's name), this is (your name) over at Capital Dental. Our records show that your last professional cleaning and oral health exam was (last cleaning). At that time Dr. (blank) also noted that he wanted to check two teeth on your top left side when you returned. We missed seeing you in (date due), and want to be sure that you are getting the follow-up care you need.
- ★ NOTE- If you have to leave a message, just say you are calling about their next/upcoming appointment (even if no appointment is scheduled). That way they will call you back wondering what you are referring to. Once you have them on the phone, you can talk about rescheduling. If you say you're calling to schedule an appointment they are more than likely not going to call back.
- After calling the patient to schedule, double click on their name and an "Edit Recall" popup will appear
 - Change the status (appointment scheduled, call back/not ready, pt will call us, left voicemail, etc.)
 - Make any notes you feel necessary

Recall	List						? 😐	□ X
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• If scheduled, pt will be removed from removed from the recall list automatically