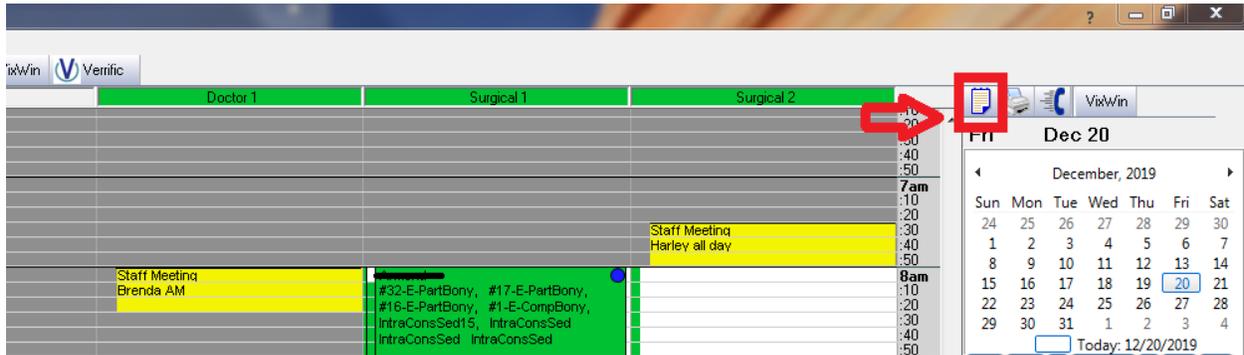


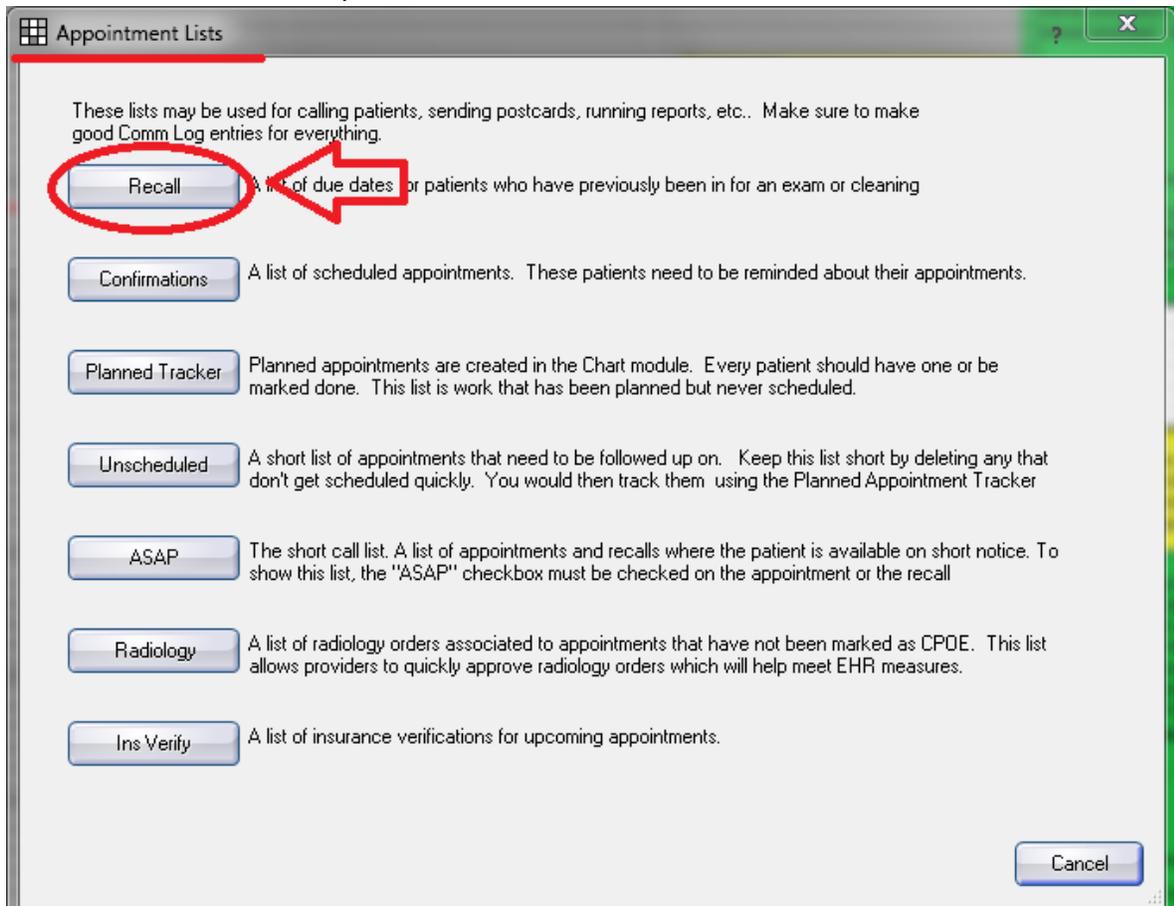
Recall List

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"



- 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”

- 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
- ★ Script 1
 - **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*

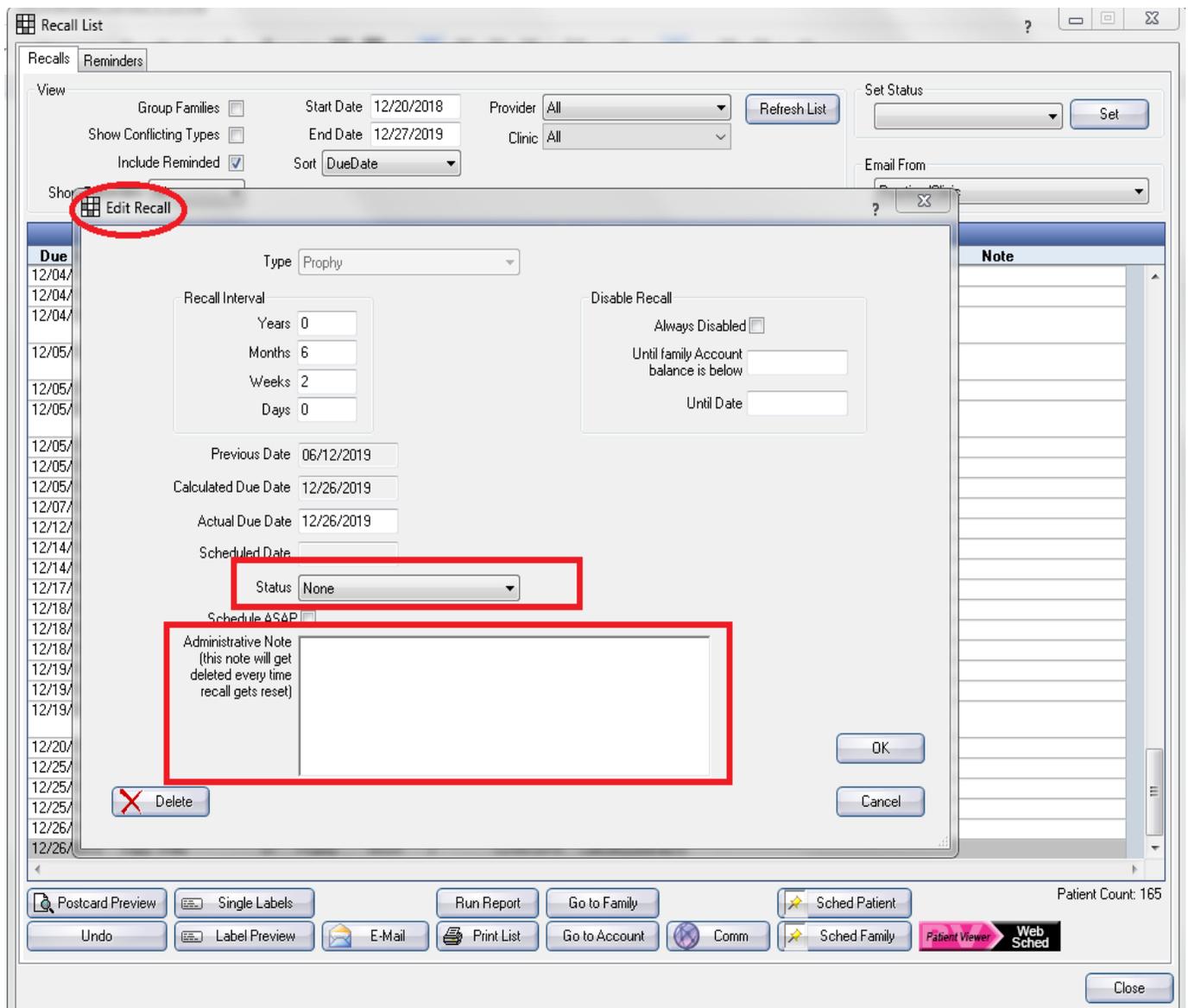
be sure to take advantage of their insurance, and we are happy to help them keep track of what they can use. Our hygienist (Hygienist's name) has time next Wednesday at 2 pm and Thursday at 9 am, which of these appointments would you prefer?

★ Script 2

- 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" pop-up will appear
 - Change the status (appointment scheduled, call back/not ready, pt will call us, left voicemail, etc.)
 - Make any notes you feel necessary



- If scheduled, pt will be removed from removed from the recall list automatically