



The Leader in Dental Front Office Solutions & Training

### **RECALL POLICY**

**It is our policy that patients book their recall appointment before they leave their last appointment for any treatment with us.**

We should always try to have every patient leave here with a future visit scheduled. The reason we do this is because it's easier to remind them when their appointment is rather than having to track them down to get scheduled. Many patients might not even know what they are doing 6 months from now, but the best way to explain this policy to them is:

***"You might not even know what you have going on 6 months from now – but what we like to do at Scripps Rock Dental is go ahead and book the appointment for you now at a day and time you think might work. Then 14 days prior to the appointment you will get a reminder from our office via Revenuwell. If that day and time we previously selected does not work for you then – just call and reschedule with us. This way you have the appointment and you won't fall through the cracks."***

**FYI** - Revenuwell will remind the patient 14 days prior to the appointment via email. It will then email and text the patient to confirm that they are coming 3 business days prior to the appointment. We then leave a confirmation message 48 hours before and then they get a reminder text the day of.

If your intention (you really WANT to get them scheduled) with this is that they will be ok with scheduling, then they will. The only patients that might be difficult to book ahead are kids and college students. With that in mind, we should at least get the parents scheduled and then put a note in their appointment screen to remember to book the kids as the appointment nears.

### **Patients Not Appointed**

However, there are some patients who might sneak through the cracks, have some reason they are not able to appoint, or cancel and need to be rescheduled. For those patients, we need to follow up with a phone call to get them scheduled when they are coming. Unless there is a special request by patients or treatment planned to be less than 6 months – all appointments are to be scheduled at least 6 months and 1 week apart, so not to have any problems getting insurance claims paid (we book 1 week after 6 months so if we must move patients we don't move too far into not have insurance pay).

**Recall calls need to be made at a minimum of 1 time a month.**

Before any phone calls are made, first look in the schedule to see if the patient is already scheduled (such as – perio maintenance or dental appointments). Sometimes they are already appointed but for some reason they still appear on our list. We don't want to cause any confusion, so it is best to check

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first. This can be done by going into the schedule and selecting the “Find Pt Appt” button along the top, and then searching for the patient.

Once you have confirmed that they don’t have an appointment – review their chart and read the most recent notes to see if there is any information you should know prior to making the phone call. Sometime there are notes about the patient being on vacation or having a special arrangement. Also, make sure to see if more than one family member needs to be scheduled, so you will be prepared to schedule anyone needing an appt on the same phone call.

Look in their chart to see when their last cleaning was, make sure of what the insurance timeframe is for cleanings, and schedule them accordingly.

If there is nothing out of the ordinary, then call the patient to get them scheduled. When calling the patient, always introduce yourself and let them know why you are calling in as friendly a manner as possible. If leaving a message, do not leave too much information due to privacy issues. A good message might sound something like this:

*“This is \_\_\_\_\_ from Office Name and I am calling to remind you that it is time to get you scheduled again in our office. Please give us a call back as soon as you get this message... our number is phone number. We look forward to hearing back from you.”*

You should either schedule the patient for their appt or leave the message and then document your call in the patient notes. Make note on the recall list and move on to next patient. When done with the recare list, turn into Office Manager.

Put notes into the chart and mark called on list.

Call everyone on the overdue recall list one time a month and then turn into the Office Manager. At the end of the list, get a new one and start again.