Utilizing the Recall Module

Recall allows users to track specific procedure codes to generate reports for follow up and patient retention.

eTHOMAS Recall

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Recall Introduction

The Recall feature has been designed to allow users to track specific procedure codes for patients in order to call them back to the office for future appointments and procedures. With Recall, the date to be recalled is automatically populated during the posting charges process; allowing for a seamless and transparent recall process. This could ultimately help retain patients and call patients back into your office that you may have lost otherwise.

Setting up Recall

Recall is set up initially through the procedure code. Access the procedure code(s) desired in which to recall patients. When the procedure code is used through the posting charges process, the recall date will populate. The Procedure Codes are accessed through Code Files | Procedure | Procedure.

Find the desired procedure code and open the procedure to the Procedure Edit.

From within the Procedure Codes, enter the number of months in which to recall the patient. In the case above, the recall is slated for 12 months; this means that the patient will be flagged to get a recall 12 months from the date of the charges being posted.

# Posting Charges to Activate Recall

When posting charges for a procedure code in which a recall is entered, the Recall date field will be populated with the future date calculated from the Procedure Code. In this case, it is 12 months from the date of the date of service.

There is a System Setting that works in conjunction with Recall. **RecallAddNote** will add recall information to the Patient Notes in the Patient Information. This could be a beneficial system setting to activate to see the procedure and the date the procedure was performed when entering the Patient Information.

Recall List

Recall Procedures are stored within Patient | Notes |Recall. From within the Recall List, users may view the list of recall procedures for a specific patient. In fact, users may manually add a recall procedure without posting charges, if needed. This may be beneficial if there is a patient that wasn't treated in the office and the physician would like the patient to be recalled into the office. From the Recall List, add the procedure code and indicate a date to recall the patient.

There is a System Setting that works in conjunction with the Recall List. Without the System Setting eTHOMAS will validate for a valid procedure code within the code files, and use that procedure code's description. **RecallNoValidate** will allow for the entry of any information within the Recall List. This may be useful if the office wishes to recall a patient for a procedure that doesn't exist in their system or would like to type something else.

Recall List Report

The Recall List Report allows users to print off a list of Recall Procedure Codes within a specific date range. To access this report, click on Reports | Financial |Recall List. From within the Recall List, enter the parameters.

Selecting Detail will give you the results plus the patients address and phone number. This is useful information if calling the patients from the Recall List or sending out post cards manually.

Custom Report

Another way to generate a Recall List is through a Custom Report. The benefit of running a Custom Report is that it may be exported to Microsoft® Word to generate letters and mailings. You must have Microsoft® Word installed on your computer and the Computer Setting UseWord activated in order to use the merging feature of the Custom Reports.

To access the Custom Reports, click Reports | Custom and click the plus sign to add a new report.

In our example, the report criterion is going to be Recall Procedure Code Equal to 99386. Click the Add Field button. Select the Field "Recall Procedure Code". Save the Report. You will be brought back to the Custom Report List. Click to highlight the report you just made and click the R button at the top of the screen. Once in the Custom Report, click the Run button.


Merging to Labels in Microsoft® Word

Once it has generated the patients, you will get a prompt of the number of results returned. Click OK and click on the MS Word button to open a Word document.
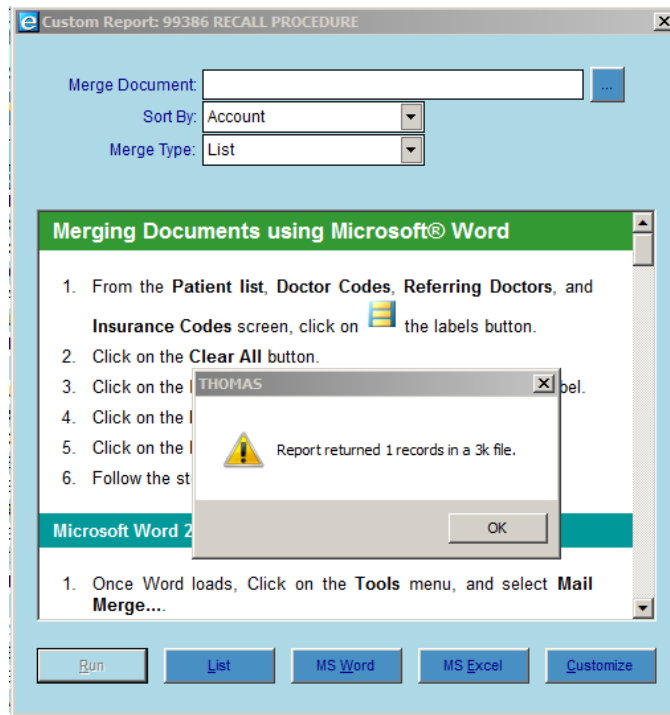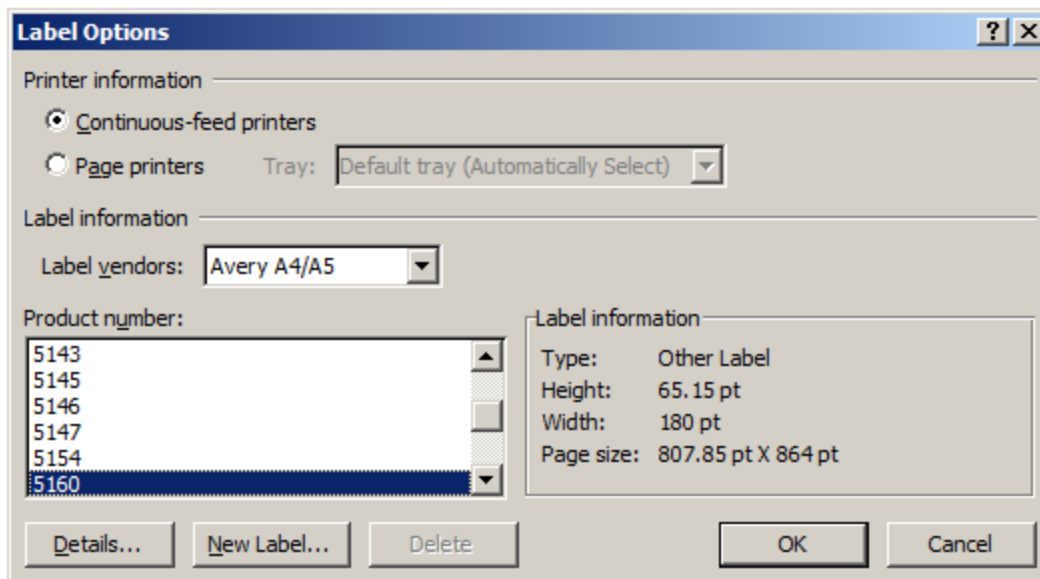
You will be presented with a blank word document. In this case, I am going to create labels to affix to a recall postcard for the patient.

Click on Start Mail Merge and select the Document Type desired. In this case, I am going to select Labels.
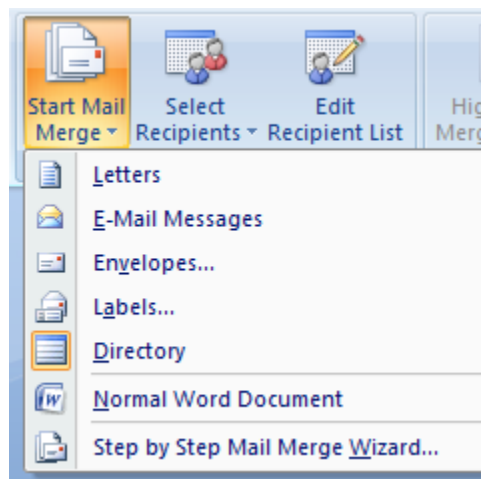
Once you have selected Labels, you will be presented with the Label Options. Select the type of label desired from the Label Options. If you have a generic brand of labels, they typically will list the brand equivalent somewhere. If not, you can always measure the labels and find the most appropriate label.

Once you have selected your labels you will be presented with what appears to be a blank word document. It is, however, not blank. There will be labels. It is recommended to show the borders of the labels. To do so, right click on the crosshairs to access the pop-up menu. Select Borders and Shading.
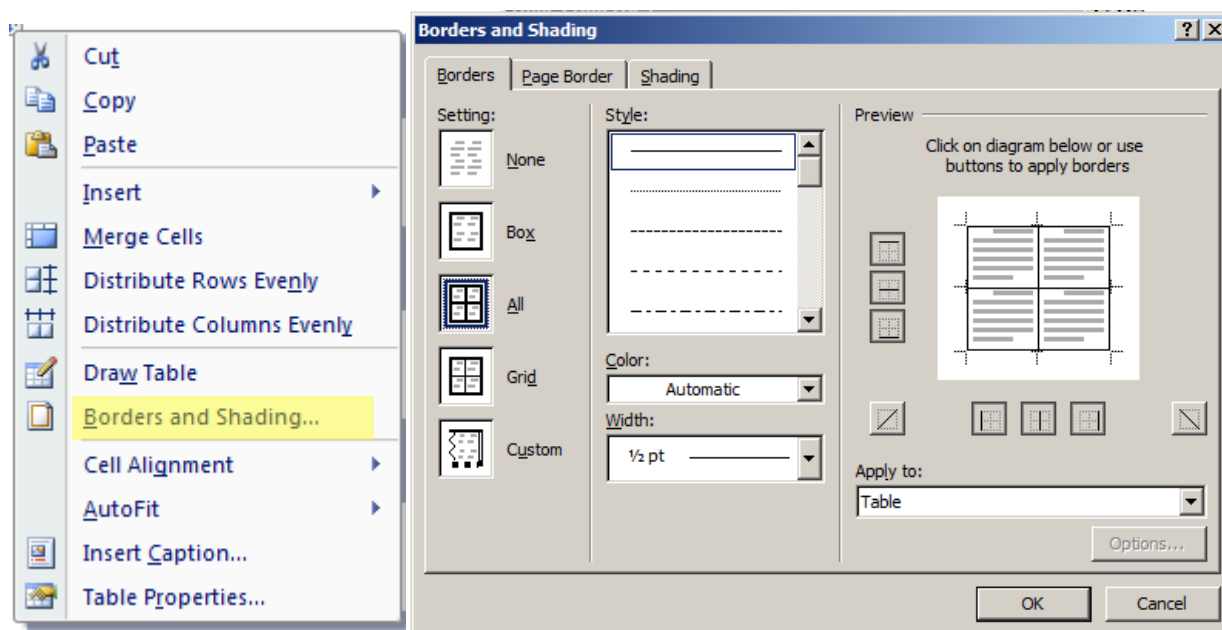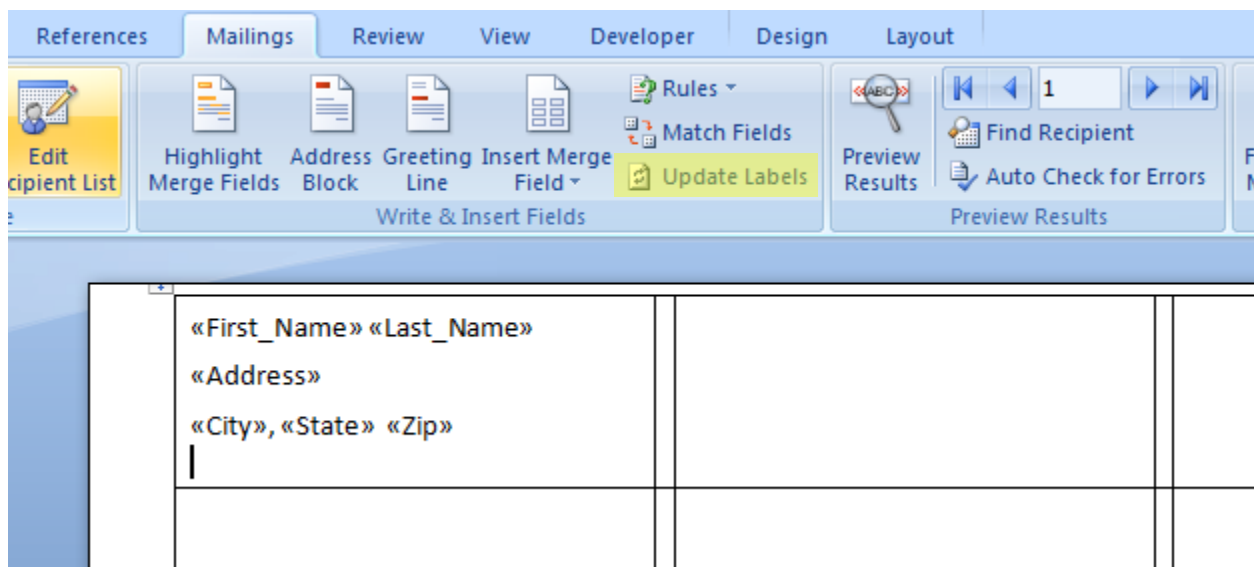

From within Borders and Shading, select the All option to show all the borders of the labels.

Now you can begin inserting Merge Fields into the first label. Make sure to input a space and punctuation where needed.
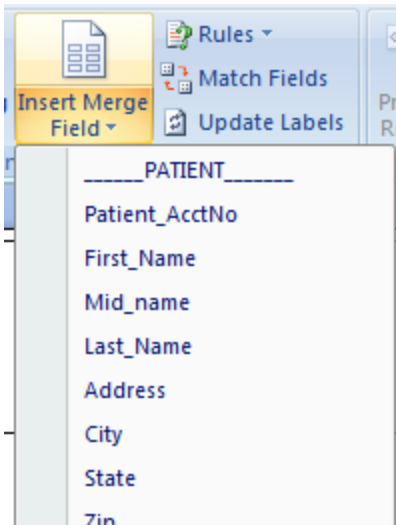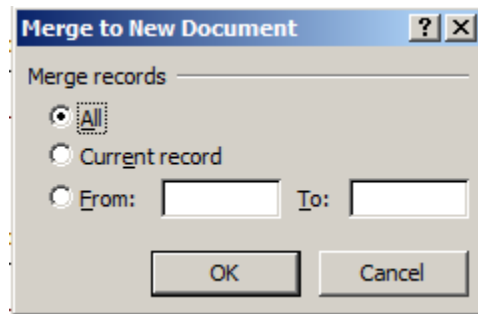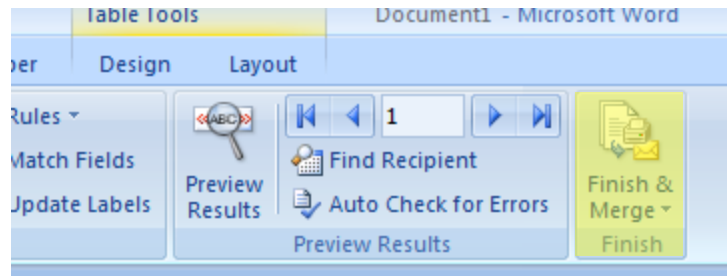
For the labels, I use First, Last Name, Address, City, State, and Zip. Click the Update Labels to update all labels on the sheet with the information.

Once the labels have been updated, click on the Finish & Merge, Merge to New Document.

If you plan on creating labels in the future, it is recommended to save the template so that you don't have to create it again later.