



“Recalling the Patients you want Now!”

Webinar will start at Noon CDT

Please use Speakers, Head Set, or call Webinar
Phone Number

Keep your Audio Muted during Webinar

Sept. 20, 2012

Topics



- Update your EasyDent Software
- Evaluate your current Recall statistics
- Gathering complete information for Recall
- Types of Recall Available
Recall Cards, Labels, Quick Form Letters, and eMail
- Recall Date Triggers
ADA Codes, Scheduling Services
- How to zero in on patients for recall
- How to use report results for recall cards, labels, email, and Quick Form Letters
- Quick Review

Update EasyDent Software

- www.ezdent.com link also on bottom right of Primary Menu
- Select Technical Notes Link
- Note #18 “Internet Update Instructions”
- Call Data Tec for current Update Password

Recall Statistics

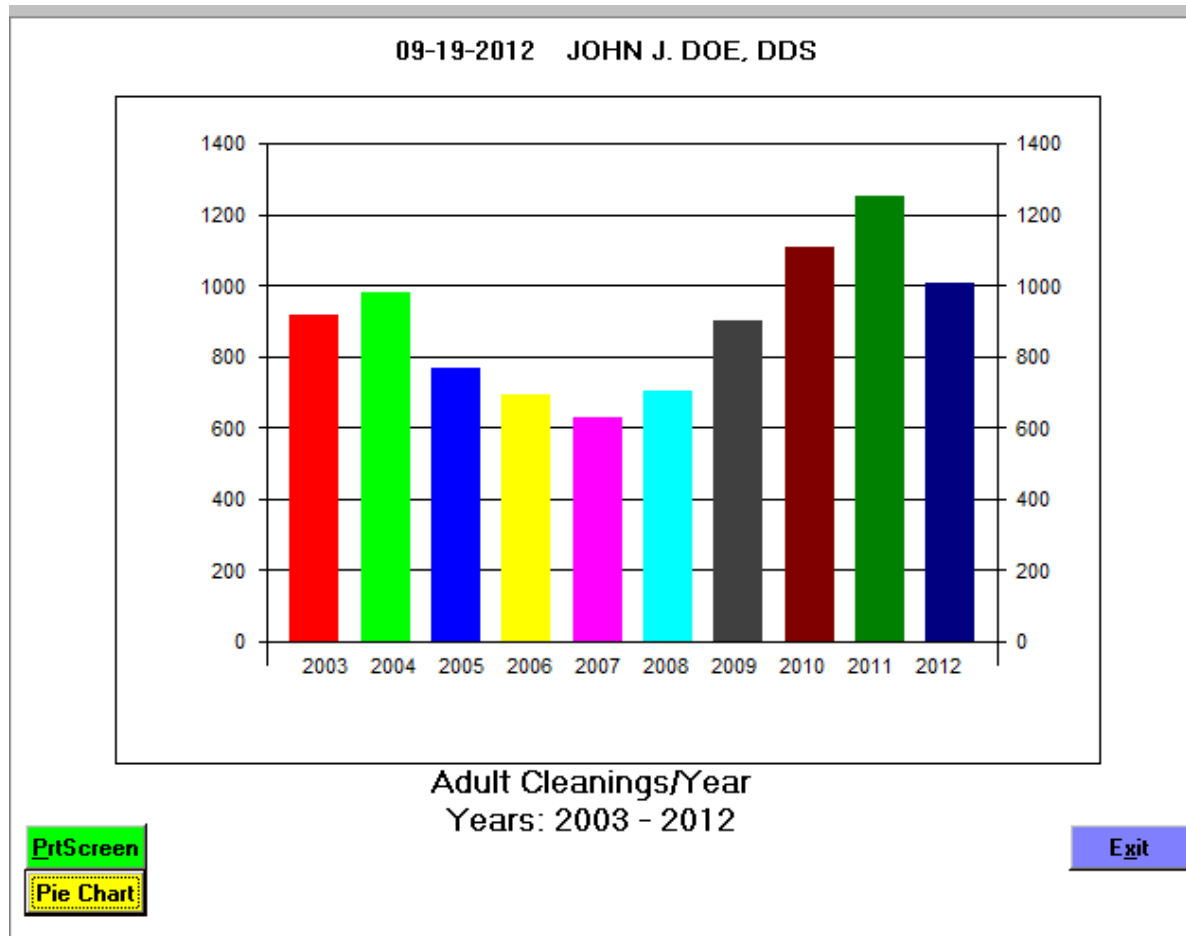
- From the Reports Menu select Monthly Reports, then Procedure Code Analysis, set the Date range within one year, use options button, then run Report.

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JOHN J. DOE, DDS
Wednesday Sep 19, 2012
Procedure Analysis 01/01/2012-09/30/2012
-----
ADA Category Summary Breakdown
-----
Category                Count  Average$  Dollars  Percentage
-----
Diagnostic      0000-0999  2833    50.44   142896.00  31.0%
Preventive      1000-1999  1317    76.47   100708.00  21.9%
Restorative     2000-2999   526   209.05   109960.00  23.9%
Endodontics    3000-3999    70   189.22   13245.50   2.9%
Periodontics   4000-4999   165   109.56   18077.00   3.9%
Prost.Removable 5000-5899   172   189.27   32554.00   7.1%
Maxillofacial  5900-5999    0     0.00     0.00     .0%
Prost.Fixed    6000-6999   195   100.54   19604.50   4.3%
Oral Surgery   7000-7999   277    79.73   22086.00   4.8%
Orthodontics   8000-8999    18     0.00     0.00     .0%
Adjunctive     9000-9999    86    19.41   1669.00    .4%
-----
Totals                5659                460800.00
-----
Procedure Analysis - Report End
  
```

Recall Statistics

- From the Reports Menu select Management Graphics, 10 Year Graphs, Adult Cleanings, Child Cleanings, and/or Total Cleanings.



Gather Complete Info

- Make sure you have the necessary information for Recall.
- You can use the new Recall Contact Assistant, it quickly checks for key info and lets you enter it by checking the patient In and/or Out on the schedule.

The screenshot shows a software window titled "RCA - Recall Contact Assistant". The window contains a "Tools" section with the following information:

- Acct No: 00269
- Name: HANCOCK GEORGE
- Age: 41 2

Below this information are two groups of checkboxes, each with a status indicator (green checkmark for present, red X for missing):

- Group 1:
 - Address:
 - Cell Phone:
 - E-Mail:
 - Recall Interval:
- Group 2:
 - ID Cards:
 - Patient Photo:

At the bottom of the window are two buttons: "Refresh" and "Exit". A text box on the right side of the interface says "Click button on the left to update".

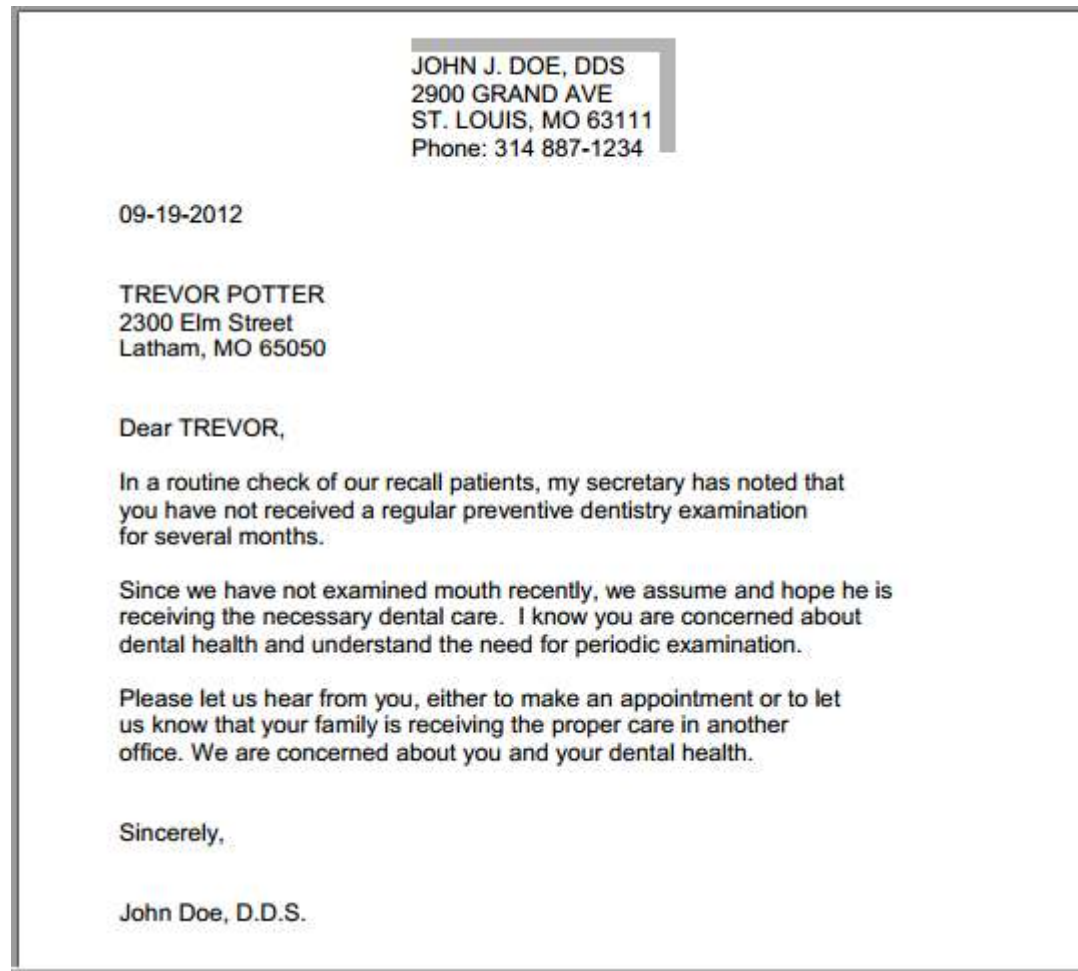
Types of Recall

- Types of Recall Available
Recall Cards, [Labels](#), Quick Form Letters, and eMail

Selena K. Patrick 751 Hill St Fairfax, MO 64446	Bryson Owen 11691 Manchester Ave Mine La Motte, MO 63645	Nicholas A. Guerrero 6673 Washington St Adair, MO 63533
Jose N. Conway 12429 Eighth St St. Louis, MO 63145	Erica Lambert 4204 View Ave Zell, MO 63670	Camila I. Moreno 9371 First St Elsberry, MO 63343
Bradley M. Hester 13216 Manchester Ave Benton, MO 63736	Genesis N. Ortega 15392 Cedar Ave Rea, MO 64480	Ariel P. Farmer 8746 Second Ave Cpe Girardeau, MO 63701
Jackson K. Barber 14281 Ninth Ave Sparta, MO 65753	Mary M. Farmer 1245 Fifth Ave St. Marys, MO 63673	Ariel P. Farmer 8746 Second Ave Cpe Girardeau, MO 63701
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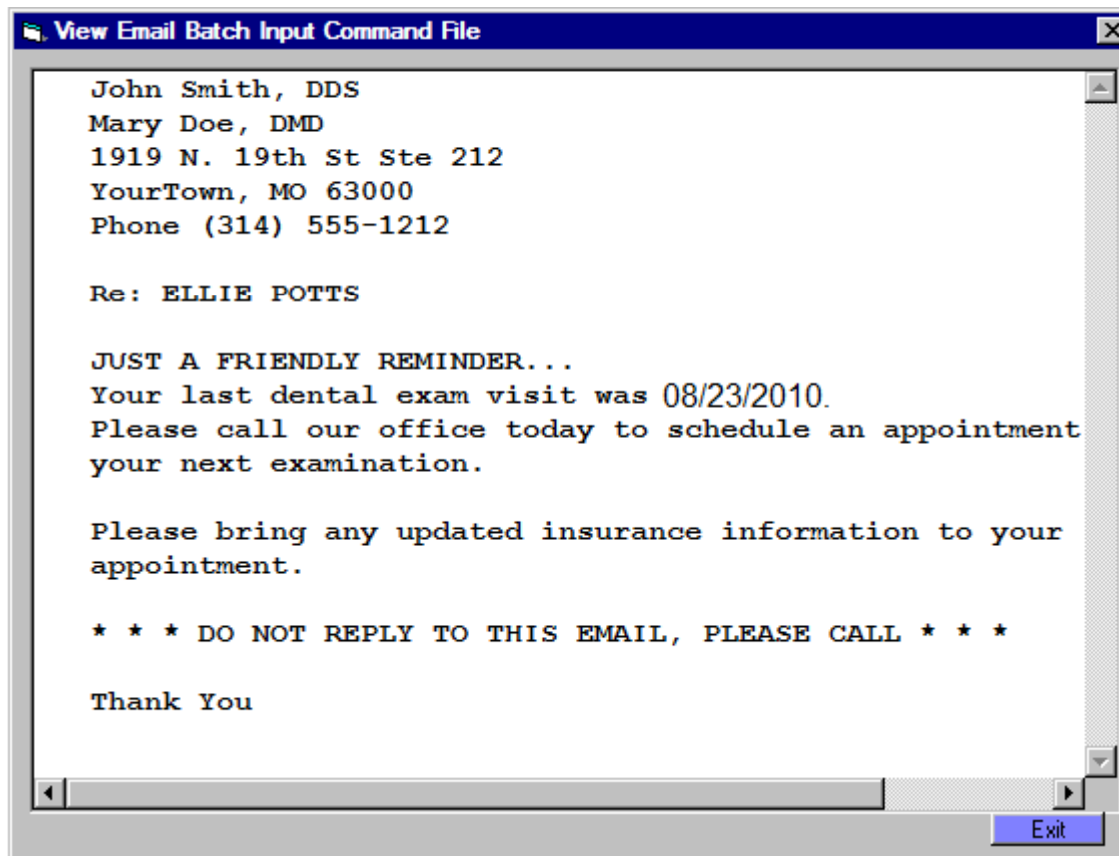
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Standard Recall Date Triggers

- ADA Codes marked in the Base Fee Schedule, typically Cleanings and Full Series of X-Rays

Fee Schedule											0	Name		Base Fees	
ADA Code	Short Hand	Dollar Amount	Procedure Description	Tooth No/Surface		Insur Print*	New Pat. Recall	CPT Code HCFA	In Act	Note	Taxable				
000481		0.00	Electron Microscopy Diag	NA	NA	00481					<input type="checkbox"/>				
000482		0.00	Direct Immunofluoresence	NA	NA	00482					<input type="checkbox"/>				
000483		0.00	Indirect Immunofluoresenc	NA	NA	00483					<input type="checkbox"/>				
000484		0.00	Consult Slides From Elsew	NA	NA	00484					<input type="checkbox"/>				
000485		0.00	Consult Include Prepslide	NA	NA	00485					<input type="checkbox"/>				
000486		0.00	Accession Of Brush Biopsy			00486					<input type="checkbox"/>				
000502		0.00	Other Oral Path Proc By/r			00502					<input type="checkbox"/>				
000999		0.00	Unspecified Diag. Proced.	NA	NA	00999					<input type="checkbox"/>				
001110		52.00	Adult Prophylaxis	NA	NA	01110	X				<input type="checkbox"/>				
001120		38.00	Child Prophylaxis	NA	NA	01120	X				<input type="checkbox"/>				
001203		19.00	Top. Appl. fluoride/child	NA	NA	01203					<input type="checkbox"/>				
001204		19.00	Fluoride Treatment/adult	NA	NA	01204					<input type="checkbox"/>				
001206		0.00	Topical Fluoride Varnish;			01206					<input type="checkbox"/>				
001310		0.00	Dietary Plan	NA	NA	01310					<input type="checkbox"/>				

Standard Recall Date Triggers

- Scheduling Service Codes

Number	Description	Code	Slots	Dir	Recall	Color	Dollar Value	Form No.
001	AD PROPHY, 0120	PRO	3		Y	B		
002	AD PRO, 0180	PROX	5		Y	B		
003	CHILD PROPHY	CPRO	3		Y	B		
004	FILL #	FIL#	4		N	P		
005	T BRK ANT/BIC	TBRK	4		N	R		
006	LOST FIL #	LFIL	4		N	P		
007	ADJ	ADJ	2		N	E		
008	CROWN #	CR	6		N	G		
009	TA #	TA	4		N	R	0	
010	BRIDGE #	BR	9		N	G	0	
011	DENTURE-FIN	DENT	5		N	A	0	
012	PARTIAL-FIN	PART	5		N	A	0	
013	TRY-IN	TRY	2		N	A	0	
014	PERIO 1 OF 2	P1	6		N	G	0	
015	RCT-ANT #	RCTA	5		N	G	0	

Zero in on Patients for Recall

- For normal monthly recall review you can use Report Menu
 - Recall Individuals
 - Recall Family Style
- For Overdue Patient use Report Menu then “Patient Recall Search” report.
 - Specify multiple criteria to find overdue patients.
 - View and/or print patient list
 - Generates Account Number file that can be used to print labels, recall cards, quick form letters, and/or send email.

Report Menu – Patient Recall Search

Patient Recall Search

Find Patients that

- 1) have been seen in the last: 36 Months
- 2) have NOT been seen recently, within 13 Months
- 3) are NOT Marked as Collections or Special
- 4) are NOT Marked as Cash Only
- 5) are NOT marked "NO-BILL"
- 6) do NOT have any Future Appointments scheduled before: 12312012
- 7) have a Treatment Plan
- 8) are marked as Active
- 9) have an Insurance Carrier
- 10) Account Balance is 10.00 Dollars or Less
- 11) Skip Patients that have YTD Insurance Payments over 800.00
- 12) General screen Recall Sent Date is Blank or older than: 06 Months
- 13) are in the Age Range of: 005 <-> 130

Based on Insurance Payment Profile

- 14) Deductible has been met for the year
- 15) have Not reached Annual Max Benefit
- 16) use Default Good Ins Profile for Patient's without Ins Profile Numbers

Only Select Patient if User Flag Matches

1 2 3 4 5

Skip Patient if User Flags Matches

1 2 3 4 5

Run After to you run this report the Account Number Work File will be created on this computer with the matching Accounts. **Exit**

Merge Recall with Quick Forms

How to Merge Quick forms with Patient Recall Search - List

- (1) Create the quick form letter that you want to send to your Patients.
- (2) From Reports Menu select the "Patient Recall Search".
- (3) Once you have established your criteria run the report.
- (4) Read the text in yellow, it will tell you that you have created your patient list for Quick forms.
- (5) Go to your Forms menu and select "Quick Form Mail Merge" select the Form you want, check to update patient recall date, and print the letters.
- (6) Use "View Sample Form" to preview on screen.
- (7) When ready to print use "Print Forms Now" button.

Recall Labels

Patient Labels - Fill In Multiple Criteria

Social Sec No Dentist No Location Code

BirthDate Thru

Last Visit Date Thru

First Visit Date Thru

Next Recall Date Thru

Last Recall Date Thru

Balance Range Thru

Insurance Carrier Thru

YTD Insur Payments Thru

Birthdate Month

User Flags 1 2 3 4 5

Patient Has Insurance

Next Recall Month Next Recall Month

Use Generated Account Number File Num Account Numbers in File

Options

- Eliminate Dependent Labels
- Print Last Name FIRST.....
- Put Account Number on Label
- Telephone Numbers On Label
- Leave Names all Cap Letters
- Use Resp Name if Present Not Pat Name
- Update Patient's Recall Sent Date**

Patient Status - General Screen

Active All InAct NotPat

Restart Account Number

View Selection List before Printing

Recall Cards or Email

Recall Cards or Email

Start and End Dates: [] [] Print or Email Format Name: **RECALL01** Restart Account Num: []

Selection Criteria

Doctor Number to Select on or 00 for all

Based on Next Recall Date
 Based on Last Recall Date
 Use Generated Account Number File []

Update Recall Sent Date on General Screen?
 Check if you want to Include CASH Only Patients

Appt Day Doesn't Matter (with or without appt)
 Appt Day Must be Filled In (must have an appt)
 Appt Day Must be Blank or 00 (has no appt)

Don't Print Card if Patient has Future Appointment Scheduled
 Update Recall Sent Date, But Don't Print the Cards
 Select Only Fee Schedule Zero!
 Skip Patients with Email Addresses when printing cards

Optional User Flag Matches 1 2 3 4 5

Special for PDF Single File

Patient Status
 Active All
 InAct NoPat

Number Cards/Sheet
 4 Cards
 2 Cards

[]
Pause Printing after this Number of Cards Print
 Special Print Option

Print **Printer Options** **Save** **Email** **Edit Print or Email Format** **Help** **Cancel** **Save Exit**

The End

