



October 2020

Newsflash

Want to Generate more End-of-Year Revenue?

It's easy to generate a list of active patients that haven't been seen recently and sent them End-of-the-Year Text and/or Email messages. Here's how:

Example Case:

It's October 2020 and you want to Text or Email Patients that have Insurance a reminder to schedule their dental recall exam before the end of the year.

Creating the Account Number File:

- 1) From the Primary Menu select the Reports Menu then Patient Recall Search.
- 2) Select the criteria you want to use. Be sure to check **#17** for **Text** messages or **#18** for **Email** Messages. See the next page for example criteria.
- 3) Click the red **Run** button.

Now, you can view a report of the patients that matched the criteria you entered in step #2. Additionally, you can send text message or emails to the patients on this list. Remember to run this report on the same workstation where you will be sending the Texts or Emails.

If you don't have Texting and/or Email messaging set up for your office, please give us a call we will gladly help you.

Phone (636) 256-7401

Continued Next Page

Example Criteria:

Patient Recall Search

Find Patients that

- 1) have been seen in the last: 36 Months
- 2) have NOT been seen recently, within 12 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: 12312020
- 7) have a Treatment Plan
- 8) are marked as Active
- 9) Does have an Insurance Carrier
- 9b) Does Not have an Insurance Carrier
- 10) Account Balance is 10.00 Dollars or Less
- 11) Skip Patients that have YTD Insurance Payments over:
- 12) General screen Recall Sent Date is Blank or older than: 07 Months
- 13) are in the Age Range of: 019 <--> 100

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

Account Work File Number

- Resp Acct Number
- Patient Acct Number

17) has a Cell Phone Number

- 18) has an Email Address

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

Cordially,

Peter Goodall & All The Staff At Data Tec, Inc.