

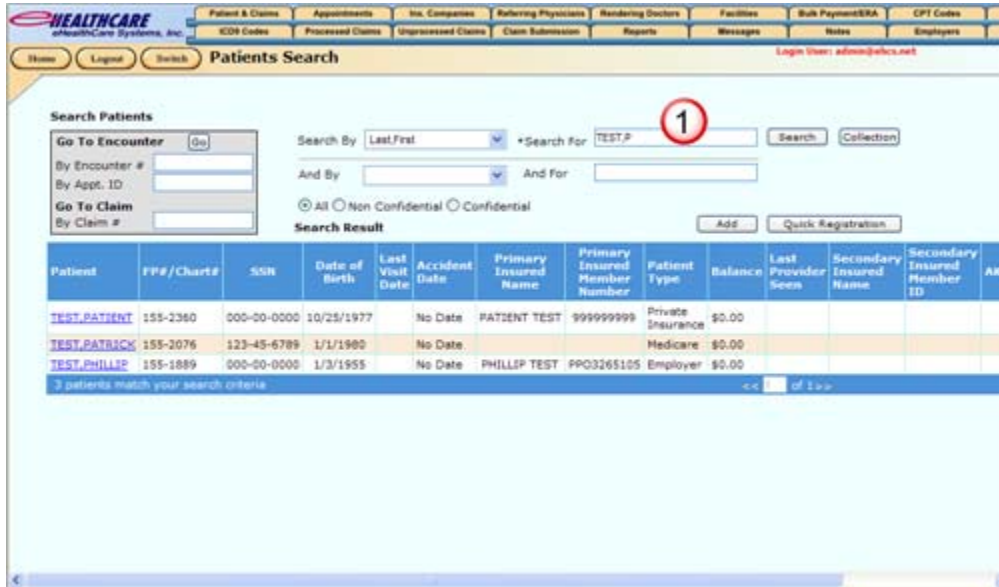
## Recalls

Currently, patient recalls must be manually entered either from the claim details page or from the patient's contact page.

### From Patients & Claims Program

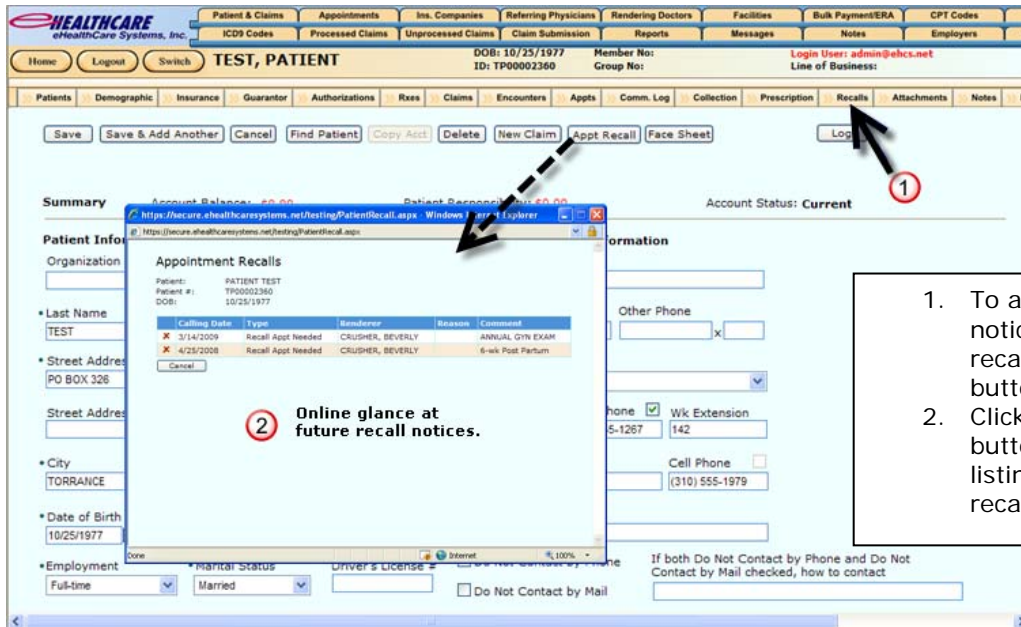
To enter recall notices from the patient's record, you must open the patient's record first.

### The Patient Search Page



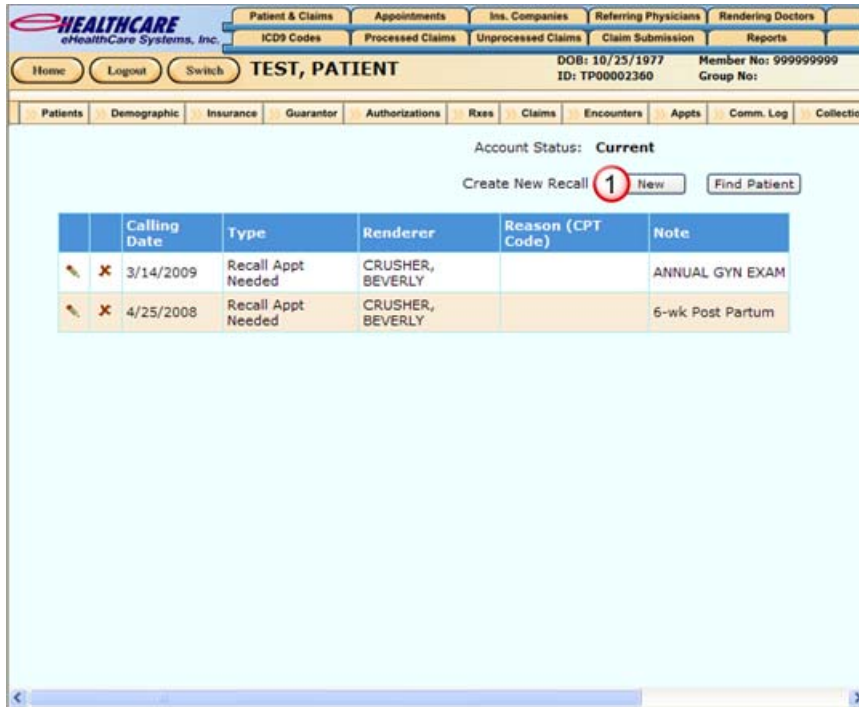
1. Once logged in, from the **Home Page**, click *Patients & Claims Tab*. Search for the patient by preferred search by method. Once the search results appear, select patient record from list

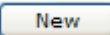

### The Patient Page



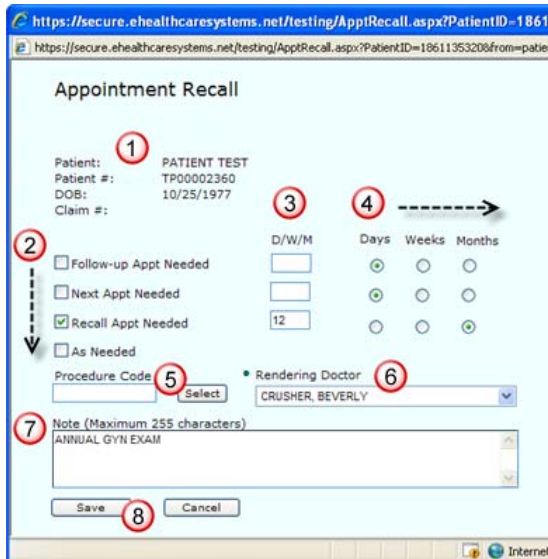
1. To access existing recall notices or to create a new recall notice, click *Recalls* button
2. Click **Appt Recall** event button to view an online listing of existing patient recall notices.

### The Recall Summary Page



1. To create a new recall notice, click 
2. To edit an existing recall notice, click 

### The Recall Notice Window



1. Confirm the selected patient
2. Choose the *type* of recall notice being added
  - a. **Caution:** To make retrieving recall notices easier, be sure your staff uses recall type consistently
  - b. Suggestions:
    - i. **Follow-up** use for return to clinic when regular appointment cannot be scheduled
    - ii. **Next Apt Needed** use when subsequent appointment is needed but is not a follow-up to today's visit
    - iii. **Recall Appt Needed** use for periodic recalls such as annual visits
    - iv. **As Needed** informational only and not reportable
3. Enter a numeric value for the number of days, weeks, or months in which the patient must be notified
4. Select days, weeks, or months option
5. A procedure code may be entered but is optional
6. Enter the intended rendering doctor the patient will see (**required**)
7. The *Note* is used to describe the reason for notifying the patient
8. Be sure to click Save. Cancel will close the window but will not save updates or additions

## Reports

Once recalls are saved, you will periodically print an *Appointment Recall* report in advance of the upcoming month.

Be sure to allow enough time to report and prepare your mailing. A general rule of thumb is to process these notices for two months from the current month. For example, if the current month is March, you would be preparing your mailing for May.

## Reports Menu



1. To access the reports menu, click the *Reports* system tab (see above image)

## Reporting Appointment Recalls

The *Appointment Recall* report lists saved notices by the date range specified. From the **Report:** droplist, select **Appointment Recall**

1. Enter desired from/to date range
  - a. You may choose a facility, but the option is only available for patients' registered facility
2. All recall types cannot be reported simultaneously, so you will need to run each type of recall separately. Choose the desired option
3. Click  to produce the recall report

## Recall List

Appointment Recall Report									
HEALTHCARE ASSOCIATES TEST SITE									
Type: Recall Appt Needed									
From 04/25/2008 To 09/30/2008									
09/14/2008 12:54 PM									
Patient Name	Chart No	Renderer Name	Recall Date	Patient Type	Reason	Home Phone	Work Phone		
TEST, PATIENT	155-2360	CRUSHER, BEVERLY	04/25/2008	Private Insurance	6-wk Post Partum	(310) 555-1212	(714) 555-1267		
Number of Recalls: 1									
Total of Recalls: 1									

1. Report Heading; 2. Patient Name; 3. Chart No; 4. Selected Rendering Doctor; 5. Recall Date; 6. Patient Type is the patient's financial type; 7. Reason is your *Note*; 8. Patient's home & work phone numbers; 9. Grand Total number of notices

## Recall Labels

Labels for any recall notices, regardless of type, are printed using the *Patient List*.

1. From *Reports* droplist, choose **Patient List**
2. Enter desired *Recall* from/to dates – do not use Last Visit From/To dates option
3. Select the desired report – in this case, you will choose *Patient Labels*
4. When ready, click

## Labels



- These labels are design for use with laser label standard labels with 30 labels per page

## Enter Recall Notices when Entering Charges

While you are entering charges, you may enter a recall, follow-up, or next appointment notice. However, many offices charge this task to the front office when the patient 'checks out'.

### The Charge Entry Page

The screenshot shows the 'Appointment Recall' window overlaid on the 'Charge Entry Page'. The window contains the following fields and options:

- Patient Information:** PATIENT TEST, Patient #: TPO002360, DOB: 10/25/1977, Claim #: 1841002147.
- Recall Type:**  Follow-up Appt Needed,  Next Appt Needed,  Recall Appt Needed,  As Needed.
- Frequency:** D/W/M: 2, Days: , Weeks: , Months: .
- Procedure Code:** 99211 (with a 'Select' dropdown).
- Rendering Doctor:** CRUSHER, BEVERLY (with a dropdown arrow).
- Note:** Recheck (with a text area).
- Buttons:** Save, Cancel.

The main charge entry page shows a procedure code of 99205 and a total cost of 192.00. The 'Appt Recall' button is highlighted in the bottom navigation bar.

1. Enter all charges
2. Click Appt Recall button
3. From the Appointment Recall window, verify the notice being entered is for the correct patient
4. Select the appropriate recall type
5. Enter a numeric value for the number of days, weeks, or month to the matching recall type
6. Select whether the numeric value entered represents number of days or weeks or months
7. In this example a procedure code *was* added, however, a procedure code entry is optional
8. The rendering doctor is automatically entered using the rendering doctor from today's claim
9. Notes explains the reason for the notice
10. Once the recall data is satisfactorily entered, click save
11. Now the claim must be saved. Click Save/Batch, Save/Hold, Save/Demand Insurance Form, or Save/Demand Statement
  - a. Your claim, along with the recall, will be saved