# TOTAL RECALL

Introduction

In our practices one of the hardest things is to manage our patients getting back to the office when the doctor wants to see them. This schedule can be a challenge to keep under control. We will cover in this class a step by step system that will help staff use all resources available to contact the patients and get them back to your office when you want to see them.

I. Pre-Appointing

   a. A consistent patient flow and a full schedule book help to ensure the profitability of the office. There is more to pre-appointing than just telling the patient to return on a certain date a year from now. Here are the steps involved in ensuring that the patients return when they are supposed to. These steps are initiated by you and are not reliant upon any action by the patient who will most likely forget to make an appointment or forget when their appointment is.

   b. Doctor-Tell the patient during the exam when you want them to return.
   c. Staff-Make the next two appointments the doctor has scheduled for the patient. For example: VF, photos, and then their yearly exam.
   d. Have the patient complete the confirmation card for their yearly exam.

   e. Give the patient an appointment card for each appointment you have made for them.

   f. IF A PATIENT DOES NOT LEAVE YOUR OFFICE WITH AN APPOINTMENT CARD, THEY DO NOT HAVE AN APPOINTMENT!!

II. Recall

   a. Set a recall on the computer for each patient as a back-up if they do not keep their scheduled appointment. They will be on your recall list to be worked through when it is past time for their appointment.
   b. This system relies solely on the patient calling you back and they are now in control rather than you. This is why we do not use this system as the primary source of getting patients back in.

III. One Month Before Appointment Send E-Mail

   a. Set your Patient Management System (We will discuss below) to contact the patient to get a confirmation.
   b. Give them one week to respond.

IV. Three Weeks Before Appointment Mail Out the Confirmation Cards

   a. One week after you send e-mail pull out the confirmation cards for the next month and look through them and pull out all confirmed patients cards. The unconfirmed patients get their cards mailed to them.

    b. The confirmation card should have the patient's appointment time, date, and a statement that they need to call our office to confirm their appointment within the next 48 hours.

V. <u>Two Weeks Before Appointment</u>
    a. Pull up your schedule on the computer and call all patients that have not called you to confirm.
    b. Try first thing in the morning and any you cannot reach, call them back in the late afternoon.
    c. Make multiple attempts to confirm with the patient at different times during the day.
    d. If a patient cannot be reached within one week of their appointment, double book the appointment
    e. This is best done at the beginning of the week so they have a full week to call you before you double book at one week out
    f. IF A PATIENT IS NOT CONFIRMED ON THE SCHEDULE ONE WEEK PRIOR TO THEIR APPOINTMENT, ASSUME THEY ARE NOT COMING!!

VI. <u>Day Before the Appointment: Reminder Call</u>
    a. Call all confirmed patients to remind them of their appointment the following day.
    b. If you have unconfirmed patients that you have not double booked, try to reach them and confirm the appointment at that time.
    c. The unconfirmed appointments that have been double booked, try to reach them to reschedule for a time that is good for them.

VII. <u>One Month After Appointment: Recalls for Cancellations and No-Shows</u>
    a. Any unconfirmed patients who do not show for their appointments or any patients that cancel their appointments and do not reschedule for another time should appear on your recall list.
    b. Pull your recalls for the previous month and send a recall postcard stating it is past time for their eye exam or print a call list call those people to reschedule them.

VIII. <u>Patients Over Their One Year Appointment</u>
    a. A staff member should be assigned to consistently manage these patients. Optimum would be using a Patient Management System in combination with phone calls from our staff.
    b. Pairing these two together is more efficient use of staff time and more cost effective for the practice.
    c. DO NOT LET THESE PEOPLE FALL THROUGH THE CRACKS BECAUSE THEY ARE ON A TREATMENT PLAN! THEY ARE OUR RESPONSIBILITY AND WE ARE LIABLE FOR THEIR EYE HEALTH!!!

IX. <u>Patient Management Systems</u>

a. There are multiple companies that will work in conjunction with your staff to help with contacting your patients.
b. These companies use multiple ways of communication. If you have the appropriate information in the computer they will text, e-mail and some companies will even make phone calls for you.
c. This does not replace totally staff involvement it just gives staff tools that minimize the phone calls they have to make which makes the practice more efficient.
d. The Recall is the part of this system that seems to get dropped. These are the patients that have not been seen in over a year. Those are the patients that can become a liability for the practice if they are not managed properly.
e. These companies use the latest technology to help you with this part of the system. The tracking part of these programs give you all the information on the patients with current appointments along with the patients they have contacted from your recall list.

SUMMARY:

As you can see, you are the driver. You stay in control of this process from start to finish. The schedule is one of the heart beats of your practice. Utilize every tool you have to make your practice more efficient which means more profitable. Remember, no appointment, not patient; no patient, no revenue; no revenue, no job!!

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