User's Guide

Recall Manager

A business tool for recalling patients

EXACT version 11.3 SP6
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Software of Excellence International
Unit A3, 34 Triton Drive,
Albany, North Shore 0632
Auckland, New Zealand
Tel: +64 9 414 1220

Website:
http://softwareofexcellence.com/

Subscribers' Portal:
http://portal.softwareofexcellence.com/user

Partnered with Henry Schein
http://www.henryschein.co.uk

Software of Excellence UK
Medcare South,
Bailey Drive,
Gillingham Business Park,
Gillingham,
Kent ME8 0PZ
United Kingdom
Tel: 0845 345 5767

UK Support
Tel: 0845 345 5767 (Option 4)
Email: support@soeuk.com
Web: http://connect.soeidental.com/

Software of Excellence Australia and New Zealand (APAC)
Level 2, Suite 3,
39 Railway Road,
Blackburn, VIC 3130
Australia
Tel: 03 8872 5500
Fax: 03 9877 5400
APAC Support
Web: http://remote.soeidental.com/
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Automated best practice recall process.

Patient recalls constitute a significant business opportunity for most Practices. **Recall Manager** is a productivity tool and a patient retention utility that automatically runs monthly recalls, monitors the progress of appointment bookings and measures the effectiveness of the recall strategy. It integrates seamlessly with the SMS and Online Booking modules. It is available from EXACT version 11.

Are you worried that you’ll have Recalls chaos if you automate?
Here’s how to lay a solid foundation for your Recalls automation...

Are your patient recall dates in such a chaotic state that you are wary of changing to an automated system? The Support Desk personnel have advanced tools to update your disordered recall dates for all active patients. This will enable you set up and fully utilise the powerful automation capabilities of Recall Manager, SMS and / or EasyPost to recall patients successfully. Please contact your Software of Excellence Liaison or Support Desk for details.

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  http://portal.softwareofexcellence.com/video/recall-manager-1-7-overview-exact-v113

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- **Recall Automation**
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- **Statistics interpretation**
  http://portal.softwareofexcellence.com/video/recall-manager-5-7-statistics-interpretation-exact-v113

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  http://portal.softwareofexcellence.com/video/recall-manager-4-7-month-view-procedures-exact-v113


- **Training Competencies**

Primary screens:

Manage Recalls Window (See *Monitoring the graphic display* (see "*Monitoring the Effectiveness display*" on page 21) and *Interpreting the Effectiveness display* (see "*Interpreting the colour display*" on page 22)):

![Primary screen: Manage Recalls Window](image)

Recall Manager Month View (on page 31) window:

![Primary screen: Recall Manager Month View](image)
Overview of Recall Manager

This Overview section includes Recall Manager introductory information in terms of Purpose, Benefits, Features and Requirements.

See also: ▶️ Recall Manager Overview
http://portal.softwareofexcellence.com/video/recall-manager-1-7-overview-exact-v113

Purpose of Recall Manager

Patient recalls constitute a significant business opportunity for most Practices. With a Provider-Patient relationship already established, and with patient contact details already known, it is possible to automate many recall actions from the EXACT software.

A productivity tool

Recall Manager automates much of the recall effort, freeing personnel resources for other tasks. Once configured for automated recalls, it will continuously recall patients as they become due, using the SMS, Email and/or EasyPost templates that are best suited for each Patient grouping.

A Business tool for retaining patients and filling the Appointment Book

EXACT continuously monitors the progress of appointment booking, and graphically displays the effectiveness of your recall strategy in the Recall Manager interface (see "Monitoring recall effectiveness" on page 21).

Use this for monitoring, reporting and improving patient retention, and for facilitating recall bookings.

Practice Managers learn how to judge the state of recalls with just a glance at the graphical display.

A Receptionist tool

Recall Manager integrates into the Appointment Book in the form of a Recalls Tab (see "Appointment Book Recalls Tab" on page 48), providing a means for Receptionists to control recalls and contact patients by means of various media, directly from the Appointment Book interface.

With Recall Manager automation, Receptionists become participant observers rather than drivers of the recall effort.

A Provider tool

Recall Manager integrates into the Patient interface with a simplification of the Recalls tab for Providers (see "Patients Recalls Tab (for Providers)" on page 18).

In Month View (see "Recall Manager Month View" on page 31), Recall Manager displays all recall records for the month as interactive hyperlinks. Any edited information updates in real time throughout EXACT.

Benefits of Recall Manager

Stop losing patients

Many dental practices fail to recall their patients for return business. Recall Manager either fully automates recalls, or enables practices to manually run their recalls in order to optimise the returning-patient business opportunity.

Automation
EXACT can be configured to automate the patient recall process. It integrates so effectively with other automated functions such as SMS Replies and Online Bookings that Receptionists often watch in amazement as recalls go out to patients, patients respond, and the Appointment Book continuously ticks over.

**Free up Reception personnel**

In busy practices Receptionists often put in constant effort to keep the recalls rolling in. If configured appropriately, Recall Manager has the potential to completely automate this effort, freeing personnel for other work.

**Increased efficiency and profitability**

Recall Manager increases chair utilisation and efficiency, driving further profit.

**Even spread of patient contacts**

With EXACT recalling due patients daily, the recall communications (SMS, Email, EasyPost) are spread evenly, with no bulk impact on a Practice.

**Run the recalls manually, if required**

A Practice can also opt to manually run recalls for configured recall actions. This has the same effect as automated recalls.

**Measure and improve Recall strategies**

Recall strategies are measurable, so they can be monitored for effectiveness and progressively improved.

**The graphical display facilitates understanding**

With a glance at the display, an experienced user can instantly grasp the recall strategy effectiveness of a Practice. For example, red equates to "bleeding", so a lot of red in the display indicates a problem with the recall strategy.

**Real time display keeps you updated**

The Recall Manager display is real time (Live), so users can monitor statistical and graphical changes in the display.

**Recall Manager is included within the EXACT software**

Recall Manager is included within the EXACT software from version 11 so it does not require separate registration.

**Simpler than previous recall software**

It simplifies the recall functionality of earlier software, and combines it into one interface.

---

### Features of Recall Manager

**Automate your recalls**

Automate the recalls so that EXACT tracks every patient in the system and continuously recalls patients as they become due, using the best or preferred recall methods per patient. If configured properly, this recall strategy requires no practitioner inputs!

Use multiple media for these automated recalls, including SMS, Email, or EasyPost (letters, postcards etc), all customised to the practice corporate appearance.

**Customise an automated multiple-action recall strategy**
You can setup multiple **sequential** automated recall actions that EXACT will implement based on a daily calculation of due appointments. For example:

- An action to recall all those due appointments next month,
- An action to recall all those who evaded recall last month, and are due appointments this month,
- An action to recall all those who evaded the first and second recalls, and were due appointments last month.
- An action to recall all those who have repeatedly evaded recall attempts, and were due an appointment 6 months ago.
- An action to notify serial recall-evaders that the Practice will stop issuing them recalls unless notified otherwise.

**Choice of default and custom-created templates**

Customise recall templates per recall method (SMS, Email, EasyPost), and configure EXACT to send specific templates to specific groups of people. For example, automatically send

- A custom **Teen Email** template to Under 19s.
- A custom **JJ SMS** template to dentist John Jones’ patients.
- A custom **Male EasyPost card** template to male patients and a **Female EasyPost card** template to female patients.
- A custom **Reassuring Email** template to patients with a history of dentist phobia.

**Recall Success Percentages**

From EXACT version 11.3 SP5 **Success** columns are included in the graphical display:

<table>
<thead>
<tr>
<th>Month</th>
<th>Patients</th>
<th>Total Recalls</th>
<th>Total Success (%)</th>
<th>Dentist</th>
<th>Dent. Success (%)</th>
<th>Hygienist</th>
<th>Hyg. Success (%)</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2012</td>
<td>52</td>
<td>51</td>
<td>2 (6%)</td>
<td>14</td>
<td>1 (7%)</td>
<td>17</td>
<td>1 (6%)</td>
<td></td>
</tr>
<tr>
<td>April 2012</td>
<td>45</td>
<td>27</td>
<td>4 (15%)</td>
<td>17</td>
<td>4 (24%)</td>
<td>10</td>
<td>0 (0%)</td>
<td></td>
</tr>
<tr>
<td>May 2012</td>
<td>56</td>
<td>22</td>
<td>1 (5%)</td>
<td>8</td>
<td>0 (0%)</td>
<td>14</td>
<td>1 (7%)</td>
<td></td>
</tr>
<tr>
<td>June 2012</td>
<td>72</td>
<td>38</td>
<td>2 (6%)</td>
<td>23</td>
<td>3 (15%)</td>
<td>15</td>
<td>0 (0%)</td>
<td></td>
</tr>
</tbody>
</table>

Success is defined as a patient having a booked or a completed recall appointment.  
So if a practice has 100 Total Recalls in a month and only 10 patients actually book or complete their recall appointment, **Success** is 10/100 = 10%.

**Manual recalls**

You can opt to manually run the configured recall actions at times that best suit the Practice. This will run the recalls configuration in the same way as if an automated scheduled recall event had just triggered.

**Automated, live, real time information**

The data in the graphical display is **Live**, always compiled, and always up to date, and as you change parameters such as recall dates in EXACT, it updates instantly, providing a visual snapshot of your recall effectiveness at any moment.

**Graphical display**
Graphing facilitates instant comparisons and maximises the readability of statistics:

![Graphs]

**Track the status of recall media**

From the EXACT interface you can watch the recalls go out and track them by means of status indicators on the screen.

For example, track the SMS recalls to patients:

- SMS appointment reminder delivered to recipient
- SMS message received by gateway but not yet delivered to recipient
- SMS delivery failed
- Reply to an SMS reminder has been received
- SMS status is now available
- SMS status unknown
- SMS failed or not sent to gateway
- SMS status unavailable

**Month View**

This displays all recall records for the month, where each information record is a hyperlink, providing direct access to editable content.

![Month View]

For Recall Manager month view, all recall Contacts are listed as hyperlinks in the Prior Contacts column, and can be viewed by means of a single click.

Simply click for details of a Contact
Recalls Tab

Receptionists monitor and control recalls directly in the Appointment Book by means of a Recalls Tab on the Activity Bar:

Recalls Outbox

A Recalls Outbox contains a single list of all recall contacts who have not been actioned:

Audit trail for patient recall contacts

All communications are recorded in a Patient file Contacts tab, where you can see a history of contacts for each patient:

Recall Statuses

"Recall Statuses" are explained by means of a colour key in the Manage Recalls tooltip:
New recall statuses have been added to the software from version 11:

- Recalls that were postponed after the recall date passed without the patient having an appointment are referred to as **Moved On**.
- Recalls that have been set to no recall, or where the patient has been set to inactive are referred to as **No Recall**.

**Optionally assign Therapists to Hygienist Recall Type**

In earlier software versions, Therapists were assigned the Dentist Recall Type. From version 11, you can **re-assign Providers for Recall Type**, which is particularly useful for Therapists, who for practical reasons can be re-assigned to the Hygienist Recall Type.

**Recall Prompt constraints**

EXACT sets constraints on Recall Prompt functions from version 11 onwards:

- Only Providers with the appropriate setting in the Recall Manager configuration see the Recall Prompt.
- Receptionists do not see the Recall Prompt.
- The Recall Prompt only displays when EXACT calculates that some patient recall parameter needs to change.

**Adjust notification settings on-the-fly**

EXACT users can quickly access the automation settings screen by means of a Recall Automation hyperlink.

**Using Recall Manager is optional**

It is not essential to use or monitor Recall Manager; the software functions automatically, so it does not rely on manual intervention, and can optionally be left unobtrusively running in the background.

**Warning on unsent recalls**

When a user opens the Recall Manager, warnings display if any recalls were not sent automatically.

---

**Requirements for Recall Manager**

Requirements are:

- **EXACT** software version 11.1 or later.
  
  Note that when EXACT is **updated** to version 11, Recall Manager adopts the recall configuration from the earlier software, and these parameters can then later be edited if necessary.

- Presentation Manager module switched on

- These **EXACT** communications tools are highly recommended for optimal automation:
  - SMS and SMS Replies
  - EasyPost
  - Email
  - Online Booking

- For **new** installations of EXACT, recall parameters must be configured from the **Recall Manager Configuration** (see "**Configuring Recall Manager**" on page 73).

**NOTE:** Recall Manager will not attempt to contact INACTIVE patients.
Using Recall Manager

This section includes procedures for using Recall Manager in the EXACT interface.

See also:

- Recall Manager Statistics interpretation
  http://portal.softwareofexcellence.com/video/recall-manager-5-7-statistics-interpretation-exact-v113
- Recall Manager - Recalls tab in Appointment Book
  http://portal.softwareofexcellence.com/video/recall-manager-6-7-appointment-book-exact-v113
- Recall Manager - procedures in the Month View
  http://portal.softwareofexcellence.com/video/recall-manager-4-7-month-view-procedures-exact-v113

Opening Recall Manager

To open Recall Manager

Open Recall Manager either from Administration > Manage Recalls...

...or from a manually-created shortcut on your task bar:

![Manage Recalls screen](image)

This opens the Manage Recalls screen and populates it with historical recall records. See the Manage Recalls screen (see "Manage Recalls (main) screen" on page 16).

Manage Recalls (main) screen

(See also: Recall Manager Statistics interpretation

The Manage Recalls screen is the main management interface for monitoring and managing recalls.
It displays a month summary per line, with an **Effectiveness summary** (see "Interpreting the colour display" on page 22) bar chart in colours that represent the Recall-health of the Practice:

<table>
<thead>
<tr>
<th>Month</th>
<th>Patients</th>
<th>Total Recalls</th>
<th>Total Success (%)</th>
<th>Dentist</th>
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<td>2</td>
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<td>4 (24%)</td>
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<td>0 (0%)</td>
<td>14</td>
<td>1 (6%)</td>
<td>2</td>
</tr>
<tr>
<td>June 2012</td>
<td>30</td>
<td>18</td>
<td>0 (0%)</td>
<td>22</td>
<td>2 (10%)</td>
<td>45</td>
<td>0 (0%)</td>
<td>0</td>
</tr>
</tbody>
</table>

The current month is displayed with bold text.

There is no red displayed in the future:

The display is real-time (Live), so you can see these figures changing when recalls are being issued to patients.

At bottom right is a toolbar:

**Run Recalls button**

This appears if you have configured for manual initiation of the automated recall parameters. **Click the button to run the recalls according to the configured parameters** (see "Manually running EXACT's automated recalls" on page 54).

**My Recalls Procedure button**

A notepad to type up procedures for quick reference. See **Notepad - My Recalls Procedure** (on page 29).

**Print Report button**

Click to print the **Recall Breakdown Report** (see "Recall Breakdown Report (Print, Email, Export)" on page 24).

**Set up Recalls button**

This is the means to configure Recall Manager. Click to display the **Recall Parameters screen** (see "Configuring the Recall Parameters Screen" on page 73).
How Providers set the Recall Details

Each patient has a Recalls tab in the Patients screen.

On this tab is a summary of Recalls Due for both Dentist and Hygienist.

When Providers treat the patient and go to finalise the treatment, EXACT pops up amended Recalls Due suggestions.

Providers accept or edit this suggested information, which then becomes the Recalls Due information on the Patients Recalls tab.

See:

Patients screen Recalls Tab (for Providers) (see "Patients Recalls Tab (for Providers)" on page 18)

Provider edits EXACT Recalls suggestions (see "Edit the EXACT Recalls Prompt suggestions" on page 19)

Patients Recalls Tab (for Providers)

The Recalls tab of the Patient File shows a number of appointment-related areas:

1. Patient’s Recalls Due status for both the Dentist and Hygienist - See Recalls Due area
2. Patient Appointment Preferences - See Updating Patient Appointment Preferences
3. Past appointments and modifications to appointments - See Viewing historical Patient Appointment information
4. Information to help you track patient referrals to other practitioners and specialists - See Tracking Patient Referrals

![Diagram of Patient File with annotations]

- **1.** Patient’s Recalls Due status for both the Dentist and Hygienist - See Recalls Due area
- **2.** Patient Appointment Preferences - See Updating Patient Appointment Preferences
- **3.** Past appointments and modifications to appointments - See Viewing historical Patient Appointment information
- **4.** Information to help you track patient referrals to other practitioners and specialists - See Tracking Patient Referrals
Edit the EXACT Recalls Prompt suggestions

When a Provider completes a treatment, EXACT prompts for confirmation of Recall details for that particular patient. The Provider can reject or edit suggestions before confirming the recall details.

Changes:

- From EXACT version 11, the Recall Prompt is constrained:
  - Only Providers with the appropriate setting in the Recall Manager configuration see the Recall Prompt.
  - Receptionists do not see the Recall Prompt.
  - The Recall Prompt only displays when EXACT calculates that some patient recall parameter needs to change, in which case it identifies suggested changes in red text.

- From EXACT version 11.3 SP6, the recall prompt allows Providers to either reject EXACT suggested recall updates: ✗, or re-instate them after rejection: ✦.

To set the Recalls based on EXACT suggestions

1. When Providers with the appropriate settings finalise a treatment, they are prompted for patient recalls.
   
   For example:

   ![Image of recall prompt with examples]

   The words in red text are suggestions from EXACT, following the treatment that the Provider is now completing.

   ![Image of recall prompt with examples]

   There are three possible actions to perform with the screen:

   ![Image of possible actions]

   - Click to edit recall details
   - Select to reject suggested changes
   - Suggested change - that the date be moved on
   - Repeat this last-seen Dentist next time
   - A new recall date, following today’s treatment
   - No change to the recall treatment

   The reason for this suggested change

   The Hygienist Recall is unmodified (no red text) (today was a Dentist treatment only)

   The reason that this Hygienist Recall is unmodified
2. To reject these changes, select the button and then click OK. Note that once you reject the changes, the button toggles to , which you can click to reinstate the suggested changes that you rejected.

3. To edit these recall details, click the blue Recall hyperlink/s, for an Edit Recall Detail screen, change the fields, then click the Update button:

4. To accept these suggestions and / or any edits that you made, simply click OK. The information will then be updated in the Recalls Due area in the Patient’s Recalls Tab. See also: Patients Recalls Tab (see "Patients Recalls Tab (for Providers)" on page 18)

Other:

If you set the recall to Do not recall patient...
... then the recall details screen will include both toggle buttons, enabling you to either reject suggestions or reinstate the previous suggestions:

![Recall Manager Screen](image)

**Monitoring recall effectiveness**

This section considers how EXACT enables you to track your recall efforts and monitor the effectiveness of your strategies.

- *Recall Manager Statistics interpretation*
  

**Monitoring the Effectiveness display**

This is a Live, real time display, so if you change a recall date, the list updates immediately.

You can double-click any month for a detailed *Month View* (see "*Recall Manager Month View*" on page 31).

**The main screen displays statistics per month:**

The main screen displays figures and a colour graphical display per month:

![Graphical Display](image)

**Columns:**

From v11.3 SP5 the display includes *Success* percentages:

<table>
<thead>
<tr>
<th>Month</th>
<th>Patients</th>
<th>Total Recalls</th>
<th>Total Success (%)</th>
<th>Dentist</th>
<th>Dent. Success (%)</th>
<th>Hygienist</th>
<th>Hyg. Success (%)</th>
<th>Effectiveness</th>
</tr>
</thead>
<tbody>
<tr>
<td>March 2012</td>
<td>52</td>
<td>31</td>
<td>(0%)</td>
<td>14</td>
<td>1 (7%)</td>
<td>17</td>
<td>1 (6%)</td>
<td></td>
</tr>
<tr>
<td>April 2012</td>
<td>45</td>
<td>27</td>
<td>(15%)</td>
<td>17</td>
<td>4 (24%)</td>
<td>10</td>
<td>0 (0%)</td>
<td></td>
</tr>
<tr>
<td>May 2012</td>
<td>56</td>
<td>22</td>
<td>(5%)</td>
<td>8</td>
<td>0 (0%)</td>
<td>14</td>
<td>1 (7%)</td>
<td></td>
</tr>
</tbody>
</table>
How these column figures are calculated:

- (minus)   + (plus)   / (divided by)

Patients        If a patient has more than one recall, the recall is counted as one
Total Recalls    Total - Inactive - Do Not Recall
Total Success    Booked + Completed
Total Success %  Total Success / Total Recalls
Dentist          Dentist Total - Dentist Inactive - Dentist Do Not Recall
Dentist Success  Dentist Booked + Dentist Completed
Dentist Success % Dentist Success / Dentist
Hygienist        Hygienist Total - Hygienist Inactive - Hygienist Do Not Recall
Hygienist Success Hygienist Booked + Hygienist Completed
Hygienist Success % Hygienist Success / Hygienist
Therapist Recalls These could constitute part of either the Dentist or the Hygienist figures, depending how you have configured the Recall Manager.

The Effectiveness graphic display has a colour code, and you can mouseover (hover your mouse cursor over) any line to see a detailed tooltip breakdown of recall types. See Interpreting the Effectiveness display (see "Interpreting the colour display" on page 22).

Interpreting the colour display

Recall Manager provides automated, live, real time status information. The data in the graphical display is Live, so as you change recall dates in EXACT, it updates instantly, providing a visual snapshot of your recall effectiveness at any moment:

Because recalls are a critical element to the success of most dental practices, this display can be used as an instant snapshot of business health. Over time you can use it as a dynamic barometer to gauge the effectiveness of your recall policies.

For example, the predominance of red in a screen would be worrying.
Roll over any graph area for tooltip Effectiveness statistics display:

<table>
<thead>
<tr>
<th>Colour</th>
<th>Representing</th>
<th>Good or bad indicator?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dark green</td>
<td>Booked: Patients with recalls whose appointments have been booked.</td>
<td>Committed business - this is the best recall status. The more dark green in the display, the better.</td>
</tr>
<tr>
<td>Light green</td>
<td>Future: Patients with recalls in the future who do not have appointments.</td>
<td>Still good. Patients remain as likely revenue for the future.</td>
</tr>
<tr>
<td>Light blue</td>
<td>Completed: Patients who completed treatment.</td>
<td>Indicates work done.</td>
</tr>
<tr>
<td>Dark blue</td>
<td>Moved On: Patients with appointments that have been postponed.</td>
<td>Okay. &quot;The appointment did not happen, but we haven’t lost them yet; they are still in the system.”</td>
</tr>
<tr>
<td>Grey</td>
<td>Inactive: patients who are permanently lost to the Practice.</td>
<td>Lost - there will be no further business from these patients.</td>
</tr>
<tr>
<td>Dark red</td>
<td>Do not recall: whether due to a patient decision or a Provider decision.</td>
<td>Not lost just yet. We will not recall them, but these patients may still choose to come back for further treatment.</td>
</tr>
<tr>
<td>Red</td>
<td>Failures: Patients who failed to be recalled, with no further planned recalls or appointment bookings.</td>
<td>&quot;The life blood of the Practice draining away&quot;. These patients were allowed to walk away. NOTE: The Recall Display should not show much red. If the Practice hasn’t seen patients for a few years, or if they are otherwise lost to the Practice, they should either be de-activated (grey status), or the Practice should have a marketing drive to bring them back; they should not be left at &quot;red&quot; status.</td>
</tr>
</tbody>
</table>

See also: Differentiating Moved On and Future Bookings (on page 24)
**Differentiating Moved On and Future Bookings**

When you edit / advance a recall, the result depends on the nature of that recall. So,

If you recall this booking **20/07/2012** (failed to be recalled) for 6 months later, the result is **Moved on**.

If you recall this booking **20/07/2012** (a recall in the future) for 6 months later, the result is **20/01/2013**.

The difference? One starts from a *failed recall in the past* (red icon) and the other starts from a *possible future recall* (green icon).

---

**Edit Recall**

**Result:**

**Starting from a Failed Recall (in the past, red icon):**

Because it started in the past, we record the fact that this patient did not come in, and we have moved the patient on to a new date. There is a change of recall status, so the colour changes.

**Starting from a Future Recall (green icon):**

We don't count this as a "Moved On" because the change in recall date is not an appointment failure, but simply a change from one *possible* date to another *possible* date. There is no change of recall status, so the colour remains the same.

---

**Recall Breakdown Report (Print, Email, Export)**

The **Recall Breakdown Report** is accessible from the Recall Manager interface.

This report gives a breakdown per Provider/s per month of every patient.

It follows the same logic as the display summary, but *by Provider/s*:

<table>
<thead>
<tr>
<th>July 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inactive: 0</td>
</tr>
<tr>
<td>Do Not Recall: 7</td>
</tr>
<tr>
<td>Completed: 0</td>
</tr>
<tr>
<td>Moved On: 0</td>
</tr>
<tr>
<td>Booked: 56</td>
</tr>
<tr>
<td>Failed: 315</td>
</tr>
<tr>
<td>Future: 133</td>
</tr>
</tbody>
</table>

**To access the Recall Breakdown Report:**

1. Click the **Print Recall Breakdown** button at the bottom right of the Recall Manager main screen or Recall Manager Month View:
2. The Print Recall Breakdown configuration screen displays:

Optionally select **Multiple** Providers:

3. Modify the parameters as you require.
4. Optionally view the Print Preview.
5. Either Print, Email or Export the Report.

*See also:*

- **Print the Recall Breakdown Report** (see "Printing the Recall Breakdown Report" on page 25)
- **Email the Recall Breakdown Report** (see "Emailing the Recall Breakdown Report" on page 26)
- **Export the Recall Breakdown Report** (see "Exporting the Recall Breakdown Report" on page 28)

**Printing the Recall Breakdown Report**

Recall Breakdown printing configuration:
The Recall Breakdown Report is configured for printing in **Configure > Printing Setup...**

If required fields are missing you may be prompted when you attempt to print this report.

**To Print the Recall Breakdown Report**

1. **Access the Recall Breakdown Report and select report parameters** (see "Recall Breakdown Report (Print, Email, Export)" on page 24).
2. **Click the Print button and follow instructions.**

**Emailing the Recall Breakdown Report**

**To Email the Recall Breakdown Report**

1. **Access the Recall Breakdown Report and select report parameters** (see "Recall Breakdown Report (Print, Email, Export)" on page 24).
2. Click the Email button.

The **Contact by Email** screen displays:

**NOTE:** You need to specify Provider and Specialist if your email template has these as merge fields.
3. Click OK to display the Create Email screen:

4. Complete all required fields and click Send.

Exporting the Recall Breakdown Report

EXACT provides the means to export reports in .CSV (comma-separated values) format, which is readable in common consumer, business, and scientific applications, including Microsoft Excel.

To Export the Recall Breakdown Report in .CSV format

1. Access the Recall Breakdown Report and select report parameters (see "Recall Breakdown Report (Print, Email, Export)" on page 24).

2. Click the Export button.

3. If necessary, name the file when prompted, and save to a custom folder (by default exported files are saved in .CSV format to C:\EXACT Exported Reports).
You may see a popup explanation screen:

Notepad - My Recalls Procedure

The Manage Recalls screen has a "Notepad" in which you can type reminders and procedures.

For example, document how your recalls are normally set up so that you can reference this information if you ever need it (before ringing Support in the event you have problems with your recalls).

To open and edit the My Recalls Procedure Notepad

1. From the Recalls Manager screen, click at bottom right.
2. Type notes in the window and then click OK:
The window has a header **Detailed Recalls Procedure for [practicename]** where the practice name is defaulted by EXACT. The text field below it is a custom notes field.

3. Click in the field and type, or edit the existing text, and then click **OK**.

**To limit who can change this Notepad text**

A security setting is enabled by default for this Notepad, but if it is disabled, a user will see only a read only copy of this window.

**Recommendation:** Once your recall procedure is documented, use this security setting to limit the number of people who can change the screen.

Set permissions by security group from **Configure > Security > Administration > Manage Recalls > Edit My Recalls Procedure**.

In this example, Receptionists have been limited from editing the content:
Recall Manager Month View

(See also: Recall Manager - procedures in the Month View
http://portal.softwareofexcellence.com/video/recall-manager-4-7-month-view-procedures-exact-v113)

To open a Recall Manager Month View

From the Recall Manager screen:

Double-click a month (line) in the Effectiveness display screen:

The Month View displays the details of its recall patients.

Hyperlinks

Note: all line entries in this screen are hyperlinks. The functionality is the same as for the Appointment Book Recalls Tab (see "Appointment Book Recalls Tab" on page 48).

Month Selector

Use this to change the month:

Column headers

The default sort order is Last Name, alphabetical.

Click a column header to sort the list by that parameter.

First Name / Last Name

Click a First or Last name to open the Patient Information tab.

You can then edit any Patient fields that need updating.
Dates

These are the Recall dates.

Coloured icons represent the same colour recall statuses as for the Effectiveness Tooltip display (see "Interpreting the colour display" on page 22).

Click any of these dates for editable information for the recall.

If you edit these fields and click Update, it will immediately update the display.

Prior contacts with patients are recorded as icons in the Prior Contacts Column. Click a Prior Contact icon to display details of the contact.

Click any of these hyperlinks to display a contact screen. A small star behind the icon indicates the preferred method of contact.

Home Address. Recall is by letter.
Business phone.
Home phone.
Home phone, SMS.
Mobile phone.
Mobile phone, SMS.
Email.

To view Recall History for a patient Month View

1. Open Recall Manager from Administration > Manage Recalls...
2. Double-click a month (line) in the Effectiveness display screen:

The Month View displays the details of its recall patients.

To view prior contacts made with a patient

Click an icon in the Prior Contacts column:
SEE ALSO:

Managing single Patients from the Recalls list (see "Contacting single Patients from the Recalls List" on page 56)

Managing multiple patients from the Recalls list (see "Contacting multiple patients from the Recalls List" on page 62)

Recall Manager - procedures in the Month View
http://portal.softwareofexcellence.com/video/recall-manager-4-7-month-view-procedures-exact-v113

Filtering the month view

By default the month view displays with all information for both dentists and hygienists.

But the month view has a Filter mechanism that you can use to isolate more specific information on the screen. This is located on the month view toolbar at bottom right of the month view screen:

IMPORTANT:
The button functions on this toolbar apply to just the data that displays on the screen. For example, if you apply a filter and then click the Email button to recall patients by email, EXACT will issue email recalls only to the patients represented in the filtered data on the screen (not to all recall patients).
Recall Manager will not attempt to contact INACTIVE patients.

Default filter selection

When you first click the filter it displays with the default selection:
Includes Overdue (red) and Future (green) listings on the screen.

**Patients with a contact preference**

Select which preferences. For example:

![Image showing contact preference options]

This will result in a display where each patient has one contact preference (indicated by a subtle star behind the icon):

![Image showing contact methods]

**The month view toolbar**

![Image showing month view toolbar]

**Manually contacting just one recall patient**

The icons in the Month View screen are interactive, so you can at any time click a contact method for a particular patient.

**Example: Printing a recall letter for one patient:**

*To print a recall letter for one patient from the month view screen*

Click the Print Letter icon for that patient, complete fields for the Letter tab and the Label tab:
Optionally **Display** before clicking the Print button.

You can at any time check the Prior Contacts column to confirm that a letter was printed:

---

**Example: Phoning one patient**

**To phone a single patient from the Month View screen**

1. Click the Phone icon for that patient.
2. Optionally type a Description for records purposes.
3. Optionally type contact notes.
4. If you have the CTI module installed, click for digital dialling:
5. You can at any time click the equivalent phone icon that appears in the Prior Contacts column to see all details of the call.

**Manually printing recall letters for multiple patients**

It is possible to filter a list of patients for recall, and then to have EXACT print letters to all of them, with their correct recall details.

**To print recall letters for multiple patients**

[Overview of this procedure: By means of the Month View screen, filter/define which patients to recall, then by means of the Document Details screen, specify a print template, and print to your printer.]

1. Access the *month view screen* (see "Recall Manager Month View" on page 31).
2. Optionally *apply a month view filter* (see "Filtering the month view" on page 33).
3. Click the *Print letters for patient recalls button*:

   ![Print letters for patient recalls]

   ... to display the Contact Patients window (this example shows a Query Template selected):

   ![Contact Patients]

   Note the wording on this screen:
   "Send multiple letters using the currently filtered list of patients or *limit the list further* using the options below."

4. You now have the option of simply selecting OK to print letters to the patients listed on the screen, or of further filtering the list on the screen by means of Query Templates before you click OK (see below for how to *filter further with Query Templates*).

   (Only if you selected a Query Template) If you selected a Query Template, you may be prompted for more information when you click OK. For example:
5. Click OK to display the Document Details screen, from where you can specify appropriate options and select a letter template:

Provider:
It is only important to specify a Provider if your template contains a provider merge field.

Specialist:
It is only important to select a Specialist if your template contains a specialist merge field.

Category:
Optional.

**Description:**
This is either pulled from the selected Template, or you can type it manually.

6. When you click the Print button, you may be prompted to select a default printer:

7. Click OK to print.

**To further filter the month view screen with Query Templates**

To further filter the patient recalls displayed in the month view screen, select a Query Template, which will be applied to the list on the screen as a second-level filter.

Either scroll up and down to locate a Query Template...

... or select from a pop-up screen:
Manually printing labels for multiple patient recall letters

It is possible to filter a list of patients for recall, and then to have EXACT print letter labels with their correct recall details.

**To print recall letter labels for multiple patients**

[Overview of this procedure: By means of the Month View screen, filter/define which patients to recall, then by means of the Document Details screen, specify a print template and print to your printer.]

1. Access the *month view screen* (see "Recall Manager Month View" on page 31).
2. Optionally *apply a month view filter* (see "Filtering the month view" on page 33).
3. Click the *Print labels for patient recalls* button:

   ![Print labels for patient recalls](image)

   ... to display the Contact Patients window:

   ![Contact Patients](image)

Note the wording on this screen:
"Send multiple labels using the currently filtered list of patients or *limit the list further* using the options below."
4. You now have the option of simply selecting **OK** to print letters to the patients listed on the screen, or of further filtering the list on the screen by means of Query Templates before you click **OK** (*see below for how to filter further with Query Templates*).

(Only if you selected a Query Template) If you selected a Query Template, you may be prompted for more information when you click OK. For example:

5. Click **OK** to display the **Document Details** screen, from where you can specify appropriate options and select a letter template:

   ![Document Details Screen](image)

   **Provider:**
   
   It is only important to specify a Provider if your template contains a provider merge field.

   ![Provider Screen](image)

   **Description:**
   
   This is either pulled from the selected Template, or you can type it manually.

   ![Description Screen](image)

6. When you click the Print button, you may be prompted to select a default printer:
7. Click OK to print.

**To further filter the month view screen with Query Templates**

To further filter the patient recalls displayed in the month view screen, select a Query Template, which will be applied to the list on the screen as a second-level filter.

Either scroll up and down to locate a Query Template...

... or select from a pop-up screen:

These are pre-defined Query Templates that could also be used elsewhere in EXACT. Optionally use the toolbar below to import or export Query Templates, or to edit, add and delete them.
Manually sending recall emails to multiple patients

It is possible to filter a list of patients for recall, and then to have EXACT email these patients with recall details.

To send recall emails to patient recalls displayed in the Month View window

[Overview of this procedure: By means of the Month View screen, filter/define which patients to recall, then by means of the Email Details screen, specify details of the email such as provider and email template, and finally, by means of the Create Email screen, create and send the email.]

1. Access the *month view screen* (see "Recall Manager Month View" on page 31).
2. Optionally *apply a month view filter* (see "Filtering the month view" on page 33).
3. Click the Send Email for patient recalls button:

   ![Send Email for patient recalls button]

   ... to display the Contact Patients window:

   ![Contact Patients window]

   Note the wording on this screen:
   "Send multiple email using the currently filtered list of patients or *limit the list further* using the options below."

4. You now have the option of simply selecting OK to automatically email the patients listed on the screen, or of further filtering the list on the screen by means of Query Templates before you click OK (see below for how to *filter further with Query Templates*).

5. When you click OK the *Email Details* screen displays. Specify details for the emails that will be sent to recall patients:

   ![Email Details screen]

   **Provider:**
   
   It is only important to specify a Provider if your email template contains a provider merge field.
Specialist:

It is only important to select a Specialist if your email template contains a specialist merge field.

Email template:

This is optional. If you leave it blank, you will still have the means to draft the email from scratch.

Category:

Optional.

Description:

This is either pulled from the selected Email Template, or you can type it manually if you do not select an Email. It will constitute the "Subject" field of the Email.

6. With all Email Details specified, click OK to advance to the Create Email screen. This will either be blank (if you did not specify an Email template), or it will contain the Email Template that you specified:

Blank:
7. Complete the email as you require and then click the large Send button to have EXACT automatically send off the emails to the specified recall patients.

*To further filter the month view screen with Query Templates*

To further filter the patient recalls displayed in the month view screen, select a Query Template, which will be applied to the list on the screen, as a second-level filter.

Either scroll up and down to locate a Query Template...
Print, Email, Export a list of recall patients

It is possible to print, preview, email or export the recall list as displayed in the month view.

**To Access the Recall List Print screen displayed in the Month View window**

1. Access the month view screen (see "Recall Manager Month View" on page 31).
2. Optionally apply a month view filter (see "Filtering the month view" on page 33).
3. Click the Print Recall List button:

The Print Recall List window displays:

See also:

*Printing the Recall List* (on page 46)
Emailing the Recall List (on page 46)

Exporting the Recall List (on page 48)

Printing the Recall List

Recall List printing configuration:

The Recall List is configured for printing in Configure > Printing Setup...

If required fields are missing you may be prompted when you attempt to print this list.

To Print the Recall List

1. Access the Recall List Print screen and select report parameters (see "Print, Email, Export a list of recall patients" on page 45).
2. Click the Print button.

Emailing the Recall List

To Print the Recall List

1. Access the Recall List Print screen and select report parameters (see "Print, Email, Export a list of recall patients" on page 45).
2. Click the Email button:

The Contact by Email screen displays:

3. Click OK to display the Create Email screen:
Exporting the Recall List

EXACT provides the means to export reports in .CSV (comma-separated values) format, which is readable in common consumer, business, and scientific applications, including Microsoft Excel.

To Export the Recall List in .CSV format

1. Access the Recall List Print screen and select report parameters (see "Print, Email, Export a list of recall patients" on page 45).
2. Click the Export button:

![Export button](image)

3. If necessary, name the file when prompted, and save to a custom folder (by default exported files are saved in .CSV format to C:\EXACT Exported Reports).

You may see a popup explanation screen:

![Popup explanation screen](image)

Appointment Book Recalls Tab

(See also: Recall Manager - Recalls tab in Appointment Book http://portal.softwareofexcellence.com/video/recall-manager-6-7-appointment-book-exact-v113)

The primary means of managing Recalls is likely to be the Appointment Book Recalls Tab.

This is a tab in the Activity Bar that displays identical recalls information as the Month View (see "Recall Manager Month View" on page 31).

Select the Appointments interface.
When enabled (see "Enabling the Appointment Book Recalls Tab" on page 49), the Recalls tab displays at the bottom of the screen:

SEE ALSO:

Managing single Patients from the Recalls list (see "Contacting single Patients from the Recalls List" on page 56)
Managing multiple patients from the Recalls list (see "Contacting multiple patients from the Recalls List" on page 62)

Recall Manager - Recalls tab in Appointment Book
http://portal.softwareofexcellence.com/video/recall-manager-6-7-appointment-book-exact-v113

Enabling the Appointment Book Recalls Tab

To enable the Recalls Tab in the Appointment Book

1. Select the Setup icon:

2. When the Setup Wizard displays, tick Select the tabs for your activity bar, and then click Next:
You will see a screen with this message:

Changes in the tabs for your activity bar applies to the current logged in user only, and applies to all appointment books for this user. To setup the tabs for other users go to the 'Configure Menu', 'User Names'.

3. Click the Next button.

In the Select Tabs screen, move Recalls from the Available Tabs column to the Selected Tabs column, and then arrange the tab order with the Up/Down arrows:

4. Click the Finish button.

The Recalls tab appears in the Activity Bar, in Month View (see "Recall Manager Month View" on page 31):

Note: All records in this tab are hyperlinks.

Adding Recalls to Appointment Book slots

NOTE: This does not apply to automated recalls, for which appointments may be confirmed without user intervention.

To add a recall to an appointment book slot
1. Double-click the Recall Date **15/07/2012** in the Recalls Tab to display details for the Recall:

![Recall Manager GUI](image)

This shows the duration of the appointment needed (taken by default from the services configuration), the service type, and the last seen Provider. Ideally your appointment should be to this same Provider for this duration. The service type may be important for booking if your Practice groups services by dates and times.

2. Locate an available slot in the Appointment Book to match the Provider in the recall (Dentist or Hygienist). Note that EXACT won't let you add a Dentist booking to a Hygienist Provider, or vice versa.

3. Drag the recall date from either the Dentist or Hygienist column in the Recalls Tab, and drop it in the slot.

   ![Drag](image)

   The Patient details will show in the appointment booking, and the recall will show as "Booked" in the Recalls Tab:
Cancelling Recall Appointments

To cancel a Recall Appointment

A Recall that you have booked as an appointment shows an occupied appointment slot, and a "Booked" status in the Recalls Tab:

1. To cancel this booking, click to select it in the Appointment Book, and then click the Cancel button at lower right of the screen:

2. Click Yes to confirm in the confirmation screen:

3. Use the selector controls to add a Cancellation Reason, and then click OK:

4. Type Notes if necessary, and then click OK:

The appointment slot again becomes available, and the Recall reverts to its previous status in the Recalls Tab:
(Note how in this example the Recall has reverted from "Booked" (green) status back to "Failed" (red) status. This happens when an appointment date is missed and the appointment is not moved on. A Booked status only applies when it assists in the future.)

Recalling Patients

EXACT provides multiple options for recalling patients:

**Automation:**
Configure automated recall parameters and set EXACT to contact patients daily.  
*Recalling patients automatically* (on page 53)

**Semi-automation:**
Configure automated recall parameters and opt to initiate these recalls by means of a Run Recalls button.  
*Manually running EXACT’s automated recalls* (on page 54)

**Contact manually:**
Manually contacting patients from Recalls List (on page 55)

Contact single Patients from the Recalls List  
*Contact individuals* (see "Contacting single Patients from the Recalls List" on page 56)

Contact multiple Patients from the Recalls List  
*Contact multiple patients* (see "Contacting multiple patients from the Recalls List" on page 62)

**Recalling patients automatically**

EXACT can be configured to daily calculate which patient recalls are due and then automatically send recall notifications to those patients in multiple media (SMS, Email, EasyPost).
The options for automation include automatically sending acknowledgements when patients reply, and configuring custom templates for particular groups of patients.

See also: Automating Recalls (on page 81) | Monitoring Recalls with Recall Manager (see "Monitoring recall effectiveness" on page 21)

Manually running EXACT’s automated recalls

The setup for EXACT’s automated recalls (see “Automating Recalls” on page 81) includes

- WHEN to contact patients.
- The methods for HOW to contact patients, and which TEMPLATES to use for each method.
- The preferred ORDER of contact methods for patients who do not have a preferred method for contacts (for example, first try SMS, then Email, then posted letter).
- Specific templates for custom patient groups.

EXACT can run this set of recall parameters automatically every day, or a user can manually initiate these recall parameters at will.

Configuration required for manual operation:

Open Recall Manager > Click the Configure Recalls button > Click the Automation button > de-select (un-check) the Run Recalls automatically checkbox:

To manually run EXACT’s automated recall parameters

1. Open Recall Manager either from Administration > Manage Recalls... or from a manually-created shortcut on your task bar:

2. Click the Run Recalls button at bottom right of the screen:

3. Take note of the popup message, identifying when last the recalls were run (another user may already have
run them). Select Yes to continue:

EXACT then runs the configured recall parameters.

4. (Optional) Locate the current month in the Recall Manager display and watch the statistics change in real time (Live) as EXACT processes the recalls:

<table>
<thead>
<tr>
<th>Month</th>
<th>2012</th>
<th>2012</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>August</td>
<td>400</td>
<td>634</td>
<td>390</td>
</tr>
<tr>
<td>September</td>
<td>51</td>
<td>72</td>
<td>49</td>
</tr>
<tr>
<td>October</td>
<td>14</td>
<td>20</td>
<td>11</td>
</tr>
<tr>
<td>November</td>
<td>9</td>
<td>17</td>
<td>9</td>
</tr>
<tr>
<td>December</td>
<td>1</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>January</td>
<td>16</td>
<td>24</td>
<td>14</td>
</tr>
<tr>
<td>February</td>
<td>13</td>
<td>17</td>
<td>13</td>
</tr>
</tbody>
</table>

5. (Optional) double-click to open the month view and watch the status of recall notifications to individual patients. These will appear under the Prior Contacts column as icons representing the recall media:

You can click any icon for details of that particular patient recall.

See also: Automating Recalls (on page 81) | Monitoring Recalls with Recall Manager (see "Monitoring recall effectiveness" on page 21)

Manually contacting patients from Recalls List

From release 11, it is possible to configure automated recalls and then either 1) let EXACT continuously contact patients based on this automated recalls configuration or 2) manually initiate this automated recalls configuration.

Or you can manually contact patients in relation to their recalls, either singly or in multiples...

The Recalls List is duplicated across two locations:
- The Recall Manager Month View (on page 31)
- The Recalls Tab in the Appointment Book (see "Appointment Book Recalls Tab" on page 48)

Contact either from the hyperlinks or from the buttons:
- Contact individuals (see "Contacting single Patients from the Recalls List" on page 56) by means of the hyperlinks in the list:
  
  - Available Contact Methods:
    - 55538932
    - 55528048 055529
    - 55518039 555373
    - 55538868 555376
    - 055514900 05
    - 55524303 555239
    - 55538344 055535

- Contact multiple patients (see "Contacting multiple patients from the Recalls List" on page 62) by filtering
the list and then applying the action buttons in the toolbar beneath the Recall List to the entire filtered list:

**Contacting single Patients from the Recalls List**

This section applies to the Recalls list in both the *Month View* (see "Recall Manager Month View" on page 31) and the *Appointment Book Recalls Tab* (on page 48).

Click any of these hyperlinks to display a contact screen. A small star behind the icon indicates the *preferred* method of contact.

<table>
<thead>
<tr>
<th>Available Contact Methods</th>
<th>Click any of these hyperlinks to display a contact screen. A small star behind the icon indicates the preferred method of contact.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Address. Recall is by letter.</td>
<td><img src="image" alt="Contact Methods" /> Home Address. Recall is by letter.</td>
</tr>
<tr>
<td>Business phone.</td>
<td><img src="image" alt="Contact Methods" /> Business phone.</td>
</tr>
<tr>
<td>Home phone.</td>
<td><img src="image" alt="Contact Methods" /> Home phone.</td>
</tr>
<tr>
<td>Home phone, SMS.</td>
<td><img src="image" alt="Contact Methods" /> Home phone, SMS.</td>
</tr>
<tr>
<td>Mobile phone.</td>
<td><img src="image" alt="Contact Methods" /> Mobile phone.</td>
</tr>
<tr>
<td>Mobile phone, SMS.</td>
<td><img src="image" alt="Contact Methods" /> Mobile phone, SMS.</td>
</tr>
<tr>
<td>Email.</td>
<td><img src="image" alt="Contact Methods" /> Email.</td>
</tr>
</tbody>
</table>

**NOTE:** A small star behind the icon identifies the Patient’s preferred means of contact. For example: 🔥.

**Changing Recall parameters for a Patient**

*To change Recall parameters for a patient*

(Appplies to both *Month View* (see "Recall Manager Month View" on page 31) and *Appointment Book Recalls Tab* (on page 48))

1. Locate the Patient and click a Recall Hyperlink from the Patient’s Dentist or Hygienist column.

   For example:

   ![Recall Details](image)

   Click **Do not recall** to see these details:

   ![Recall Details](image)

   Note the **History** button - click this to view the historical recalls:
In this example the Patient is set to Do Not Recall for this month, but has a Recall scheduled for 6 months in the future.

2. Update the editable details and then click Update.
   The changes are immediately updated in the Recalls screens.

**Viewing Prior Contacts from the Recalls List**

**To view a Prior Contact from the Recalls List**

(Applies to both Month View (see “Recall Manager Month View” on page 31) and Appointment Book Recalls Tab (on page 48))

These contacts are listed as icons under the Prior Contacts column.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Dentist</th>
<th>Hygienist</th>
<th>Date</th>
<th>Prior Contacts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nazrey</td>
<td>Aegraven</td>
<td></td>
<td></td>
<td>5/07/2012</td>
<td></td>
</tr>
<tr>
<td>Itsa</td>
<td>Albadan</td>
<td></td>
<td></td>
<td>6/07/2012</td>
<td></td>
</tr>
<tr>
<td>Ralf</td>
<td>Albadan</td>
<td></td>
<td></td>
<td>18/07/2012</td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Different icons are used for Labels 🔄 and Letters 📄 so that users can tell them apart.

Double-click an icon to open the Contact Information screen:

**Contacting a Patient by Home Address (Letter)**

**To contact a patient by Home Address (Letter)**

(Applies to both Month View (see “Recall Manager Month View” on page 31) and Appointment Book Recalls Tab (on page 48))

1. Click the Patient’s Home Address icon 📄 to display the Letter Contact screen.
2. Complete all fields in the Letter tab.
3. Optionally Display the Letter to check your selection.
4. When ready, click the Print button to print the letter (requires functional printer setup).
5. Repeat this process for the Label tab.

**Contacting a Patient by Mobile**

**To contact a Patient by Mobile**

(Appplies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. Click the Patient's Mobile phone number to display the Phone Contact screen.

2. Optionally type Contact Notes before or after the call (for example, details of the call).
3. If you have CTI, click the Dial button to dial directly.
4. Click OK when completed.
5. The call is recorded as a Phone contact in the Month View.

**Contacting a Patient by SMS**

**To contact a patient by SMS**

(Appplies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. Click the Patient's SMS Mobile icon or SMS Home phone icon to display the SMS contact window.
2. Select the Provider, Specialist and SMS templates (click in each field to activate the selection controls for that field).
3. If you select a Category, it will be added against the SMS and displayed in the Category column in the Contacts tab as EXACT does for letters, as a quick reference to identify the purpose of the message.
4. Click the button to open the Create SMS window, with the Description and Message fields defaulted (if you chose an SMS template), or the screen blank to enable you to enter your own details. In the case of a defaulted message, you still have the option to edit the details (see below).
5. In this window, you can edit the **Description** - which is used for the Contacts tab - and can also edit the message to be sent. If the message to be sent is a Flash message, tick the Flash checkbox, if it is not already ticked by default for the SMS Template (if one is used). Alternatively, if the template is for a Flash message, you can untick the checkbox to send it as an ordinary SMS if you wish.

6. As you enter text, the line under the message box will display the *approximate character count*, and how many 153-character SMS messages this represents, which will be charged against your SMS account credit. If you wish to limit this, you can either delete text and/or merge fields (such as the patients name, or other details) to shorten the message, or click in the Truncate To field and select the maximum length of the message, in message unit multiples (1 to 9) of approximately 160 character length (1 SMS) or 153 characters for longer messages.

7. Clicking the **OK** button on this window will create the SMS messages for the selected patient in **EXACT**, and either send the SMS message or queue it to be sent, depending on your settings. The contact list entry will be updated with the appropriate SMS status icon in the Type column.

   For an SMS message, one of the following icons may appear, depending on the status:
   - 📮 SMS appointment reminder sent to recipient (delivered)
   - 📬 SMS message received by gateway (sent, but not yet delivered)
   - 🔴 SMS delivery failed (where SOE is the SMS provider; password is wrong, insufficient credit, etc.)
   - 📞 Reply received (for SMS reminder sent to patient)
   - 🙋 SMS status is now available
   - 📬 SMS status unknown (TXTConncexions / Icetrak / 4Production)
   - 📬 SMS failed or not sent to gateway
   - 📬 SMS status unavailable (other SMS providers)

   **A tooltip displays when you hover your mouse cursor over each of the icons.**

8. The SMS message will also appear in the Email Outbox until it is sent, when it will be removed and will appear in the Sent tab.

   It will have the appropriate icon in the Status column.

   Only email replies will appear in the Email Inbox.

   If staggered recall settings are in effect, the column marked with a clock icon 🕒 will have a corresponding icon for any items in the Outbox which are subject to the settings.

   If you hover your mouse cursor over the icon, a tooltip will tell you when the SMS is due to be sent, as in this
Contacting a Patient by Email

To contact a Patient by Email

(Applies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. Click the Patient’s Email icon.

The Email Details window displays:

- **Provider**: It is only important to specify a Provider if your email template contains a provider merge field.
- **Specialist**: It is only important to select a Specialist if your email template contains a specialist merge field.
- If you wish to include details from the provider and/or the specialist files, you MUST select the appropriate provider and/or specialist. If you also want to email a copy to the specialist, tick the **Email the Selected Specialist** checkbox.
- Select an **Email Template** or leave the field blank if you intend simply typing a message.
- If you select a **Category** it will be added against the email and displayed in the Category column in the Contacts tab as <exact> does for letters, as a quick reference to identify the purpose of the email.
- **Description**: This is the Subject field of the Email. It is either retrieved from the selected Email Template, or you can type it manually if you do not select an Email Template.
- If you have a pre-configured email signature, you can be add it to the tail of the message, by checking (ticking) the **Include Email Signature** checkbox. This checkbox will not be available (as in the above image) if you have no pre-configured Email signature.

2. With all Email details specified, click **OK** to advance to the Create Email screen.

This will either be blank (if you did not specify an Email template), or it will contain the Email Template that you specified.

Blank:
3. Optionally **Attach** any documents, image files (x-rays, photos, etc.) or other files.

When you select Finish, the attachment/s appear in the Create Email screen. You can right-click them to see further options:
To add a further attachment, click the +1 button.

To delete an attachment, select it then click the Delete button.

To save an attachment to another location, select it, click the Save button, and specify the location.

To open (view) an attachment, select it then click the Open button; this will open the attachment with the appropriate program.

4. Complete the email as you require and then click the large **Send** button to have `<exact>` automatically send the email to the patient:

5. Optionally preview the email message in the Outbox folder where it is queued for sending.

6. Once sent you can locate the Email in the patient Contacts Tab.

**Contacting multiple patients from the Recalls List**

This section applies to the Recalls list in both the *Month View* (see "Recall Manager Month View" on page 31) and the *Appointment Book Recalls Tab* (on page 48).

**To deal with multiple recalls**

1. **Filter the Recalls List** (see "Filtering the Recalls List" on page 63) to specify patients.

2. Select actions from the Recalls List toolbar:

   ![Recall Manager toolbar]

   - See also *Recall Manager Month View* (on page 31)
Filtering the Recalls List

The Recalls List can be filtered to show only those entries that meet required parameters.

To filter the Recalls List

(Appplies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. Click the Filter button at bottom right of the Month View screen:

2. Select the options:

A common template is Dentist and Hygienist, providing a comprehensive display:

Printing the Recalls List

To Print the Recalls List

(Appplies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. (Optional) Filter the Recalls list (see "Filtering the Recalls List" on page 63) to specify the information that you want to print.

2. Click the Print button at bottom right of the screen:

The Print Recall List screen displays:
3. (Optional) Click to **Preview** the print job.

4. Modify other options if necessary: Select **Number of copies**, **Printer**, and **Edit the Layout**.

5. Click the **Print** button.

---

### Printing multiple Letter and Label Contacts from the Recalls list

#### To Print Letter and Label Contacts from the Recalls list

(Applies to both *Month View* (see "Recall Manager Month View" on page 31) and *Appointment Book Recalls Tab* (on page 48))

1. (Optional) **Filter the Recalls list** (see "Filtering the Recalls List" on page 63) to specify the patients whom you wish to contact by Letter.

2. Click the **Letter Contact** button or the **Label Contact** button at bottom right of the screen:

![Filter button](image)

The **Contact Patients** screen displays (the same screen is used for both Letters and Labels):

![Contact Patients screen](image)

Here you can fine-tune the selection:

- Specify the **From** and **To** range of Patient names
- Select Patients by means of a Query: click in the **Select Patients** field to see controls for Query selection:

![Select Patients field](image)

3. Select **OK**.

The **Document Details / Label details** screen displays. For example:
4. Select a **Provider**, **Specialist**, and **Category** as required.

5. Type a **Description** for the print job.

6. Select a **Template** from the list. (Refer to Document Templates (Presentation Manager) or Letter Templates for further information.)

7. Click **Print** to print the Letters / Labels.
   
   **Important:** *Once commenced, you cannot stop printing until all letters / Labels are printed.* To check for any mistakes in the letter before they are sent out, print or preview a single letter *before* starting a batch.

### Sending multiple SMS messages from the Recalls List

#### To send multiple SMS messages from the Recalls List

(Applies to both **Month View** (see "Recall Manager Month View" on page 31) and **Appointment Book Recalls Tab** (on page 48))

1. (Optional) **Filter the Recalls list** (see "Filtering the Recalls List" on page 63) to specify the patients to whom you wish to send SMS messages.

2. Click the **SMS** button at bottom right of the screen:

3. You will be presented with the following screen, if you have set up staggered recalls in your email configuration:

   ![Stagger SMS dialog box]

   At this point, you can either:
   
   - Click the Send all SMS straight away to send the SMS messages.
   - Accept the staggered SMS settings, as listed.
   - Change any of the delivery times by clicking on a line, and then delete the line using the **Delete** button.
button. A new delivery time can then be added via the Add button.

- Accept the delivery times, but change the delivery frequency.

Once you have reviewed (and edited the staggered settings, if required), click the OK button.

4. The SMS Details window is now displayed, to enable you to enter Provider and/or Specialist codes, if there are pertinent merge fields that need to be included in the SMS:

If you wish to also send an SMS to a specialist, select their code in the Specialist field, then tick the Email the Selected Specialist checkbox.

You can also choose an SMS template if you wish to use a preset message as a basis for the SMS. If you do so, the Description field is automatically filled, but may be edited if required. Similarly, the Category field is usually defaulted but can be changed or deleted if you wish.

5. Click the OK button; the Create SMS window will now be displayed, as for the single SMS option. If you have selected an SMS template, the text from the template will be displayed, but you may still edit the details of this if you wish, by clicking in the field.

Note the following:

- The Flash box is checked for Flash SMS messages; do not delete the FLASH inserted at the beginning of the message - this tells the SMS provider to send this as a Flash message.

- The text in the box is counted in the Character count field below it, to let you know how long the message is. This will not be accurate if any merge fields are present, so you will have to estimate how long each merge field is likely to be, based on what it represents.
6. Clicking the **OK** button on this window will create the SMS messages for the selected patients in EXACT, and either send the SMS messages or queue them to be sent, depending on your settings. The contact list entries will be updated with the appropriate SMS status icon in the Type column.

For an SMS message, one of the following icons may appear, depending on the status:

- SMS appointment reminder sent to recipient (delivered)
- SMS message received by gateway (sent, but not yet delivered)
- SMS delivery failed (where SOE is the SMS provider; password is wrong, insufficient credit, etc.)
- Reply received (for SMS reminder sent to patient)
- SMS status is now available
- SMS status unknown (TXTConnexions / Icetrak / 4Production)
- SMS failed or not sent to gateway
- SMS status unavailable (other SMS providers)

A **tooltip displays when you hover your mouse cursor over each of the icons.**

7. The SMS messages will also appear in the Email Outbox until they are sent, when they will be removed and will appear in the Sent tab. In each case they will have the appropriate icon in the Status column.

Only email replies will appear in the Email Inbox.

If staggered recall settings are in effect, the column marked with a clock icon **will have a corresponding icon for any items in the Outbox that are subject to the settings.**

If you hover your mouse cursor over the icon, a tooltip will tell you when the SMS is due to be sent, as in this example:

```
Deliver no earlier than Tue 24-02-2009 18:02
```

<table>
<thead>
<tr>
<th>Pickering</th>
<th>SMS Reminder eMail</th>
</tr>
</thead>
<tbody>
<tr>
<td>face</td>
<td>SMS Reminder eMail</td>
</tr>
</tbody>
</table>

---

Recall Manager

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Sending multiple Emails from the Recalls List

To send multiple Emails from the Recalls List

(Appplies to both Month View (see "Recall Manager Month View" on page 31) and Appointment Book Recalls Tab (on page 48))

1. (Optional) Filter the Recalls list (see "Filtering the Recalls List" on page 63) to specify the patients to whom you wish to send Emails.

2. Click the Email button at bottom right of the screen:

The Email Details window displays:

- **Provider**: It is only important to specify a Provider if your email template contains a provider merge field.
- **Specialist**: It is only important to select a Specialist if your email template contains a specialist merge field.

If you wish to include details from the provider and/or the specialist files, you MUST select the appropriate provider and/or specialist. If you also want to email a copy to the specialist, tick the **Email the Selected Specialist** checkbox.

Select an **Email Template** or leave the field blank if you intend simply typing a message.

If you select a **Category** it will be added against the email and displayed in the Category column in the Contacts tab as <exact> does for letters, as a quick reference to identify the purpose of the email.

**Description**: This is the Subject field of the Email. It is either retrieved from the selected Email Template, or you can type it manually if you do not select an Email Template.

If you have a pre-configured email signature, you can be add it to the tail of the message, by checking (ticking) the **Include Email Signature** checkbox. This checkbox will not be available (as in the above image) if you have no pre-configured Email signature.

3. With all Email details specified, click OK to advance to the Create Email screen.

This will either be blank (if you did not specify an Email template), or it will contain the Email Template that you specified.

Blank:
4. Optionally **Attach** any documents, image files (x-rays, photos, etc.) or other files.

When you select Finish, the attachment/s appear in the Create Email screen. You can right-click them to see further options:
To add a further attachment, click the +1 button.
To delete an attachment, select it then click the Delete button.
To save an attachment to another location, select it, click the Save button, and specify the location.
To open (view) an attachment, select it then click the Open button; this will open the attachment with the appropriate program.

5. Complete the email as you require and then click the large **Send** button to have <exact> automatically send the email to the patient:

6. Optionally preview the email message in the Outbox folder where it is queued for sending.

7. Once sent you can locate the Email in the patient Contacts Tab.
Viewing Patient Recall History

To view Patient Recall History

1. Locate the Patient and click a Recall Hyperlink from the Patient’s Dentist or Hygienist column to display editable details:

2. Click the History button to display the Recall History for the Patient:

3. Optionally click the Show Audit button to display all historical changes.

4. Click Close to return to Month View.

Prebooking patient recalls

Prebooking is when a patient recall is booked before the patient leaves the Practice.

Prebooking is indicated by means of a dark green graphical bar:

The light green represents patients who should potentially be prebooked, but for some reason are not. A high level of prebooking is a health-indicator for a Practice, so the more dark green the better.

The Appointment Workflow is a patient retention utility that facilitates prebooking.

Recall information deriving from Recall Manager can be listed as a booking task on the Receptionist’s departure
task list for each patient. This task list integrates with appointment books, and lists the tasks for the Receptionist to complete during a patient's departure.

For example, here the Receptionist is viewing a task to issue a brochure:
Configuring Recall Manager

Recall Manager does not require registration as it comes with EXACT software version 11 or later.

Configuration is simply a matter of defining the Recall Parameters (see "Configuring the Recall Parameters Screen" on page 73), and its sub-screens.

For an upgrade, all settings that you configured in a previous software version are collated and defaulted on a single Recall Parameters screen.

See also:

- Recall Manager Overview and Configuration
  http://portal.softwareofexcellence.com/video/recall-manager-2-7-configuration-exact-v113

- Recall Automation
  http://portal.softwareofexcellence.com/video/recall-manager-3-7-automation-exact-v113

Configuring the Recall Parameters Screen

To configure the Recall Parameters screen

1. Open the Recall Manager (see "Opening Recall Manager" on page 16).
2. Click the Configure Recalls button:

The Recall Parameters Screen displays:

![Recall Parameters Screen](image)

**NOTE:** Each time that you upgrade the EXACT software, existing settings will propagate into the upgraded Recall Manager.

3. Configure the different Recall Parameters as indicated below:
| **Recall Types** | Dentist and Hygienist, with Providers listed for each. This table is a summary. To configure Dentist and Hygienists, see:  
*Edit Recall Type for Dentist or Hygienist* (on page 75)  
*Tip:* You can manually override the default assignment of Providers to Dentist / Hygienist Recall Type. For example, you can re-assign Therapists to the Hygienist Recall Type for practical recall reasons, as they are not permitted to do diagnostics. |
|-----------------|---------------------------------------------------------------------------------------------------------------|
| **Merge Fields** | Click to open a Merge Fields Window. From here you can see how the merge fields will appear in patient communications. This includes:  
- Combinations of Dentist and Hygienist recalls.  
- Family recalls.  
- Combined dentist and Hygienist Service (co-ordinated duties) - this must be activated. Click in this field to see the selection controls.  
*Important:* This screen provides a means of specifying whether Dentist and Hygienist recall appointments should be booked *separately* or *in combination*, which affects how Receptionists book recalls in the Appointment Book.  
*See:* *Editing the Merge Fields* (on page 80) |
| **Online Recalls** | Click this button to open a screen for configuring the times during which patients can book recalls online. |
| **Automation** | Configure EXACT to automatically send recalls by available means such as SMS, Email and EasyPost.  
*See:* *Automating Recalls* (on page 81) |
Edit Recall Type for Dentist or Hygienist

To configure the Recall Type for Dentist or Hygienist

1. Open the Recall Manager (see "Opening Recall Manager" on page 16).
2. Click the Configure Recalls button:

The Recall Parameters Screen (see "Configuring the Recall Parameters Screen" on page 73) displays:

![Recall Parameters Screen](image)

(For information on this screen, see Recall Parameters Screen (see "Configuring the Recall Parameters Screen" on page 73))

3. On the Recall parameters screen, click either the Dentist or Hygienist Recall Type, to display the Edit Recall Type screen. For example (Dentist):

![Edit Recall Type Screen](image)
See also: *Editing Recall Type Advanced Settings* (on page 77)

<table>
<thead>
<tr>
<th><strong>Show on recall Letter as</strong></th>
<th>Select the kind of service for which the recall is initiated.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Default Booking Service</strong></td>
<td>This is for new patients, and can be changed. Select the service from the selection controls.</td>
</tr>
<tr>
<td><strong>Default interval</strong></td>
<td>This is for new patients. Select from the controls. Any customised interval for a patient will be carried forward.</td>
</tr>
<tr>
<td><strong>Providers assigned to this recall type</strong></td>
<td>The Providers involved.</td>
</tr>
</tbody>
</table>

**Advancing the Recall Date:** How the recall will be moved on into the future, after charting appointments:

- **At every appointment**
  - This is an informal arrangement. The Provider simply wants to see patients at regular intervals after treatments. So if a patient has a course of treatments ranging across a month, the final recall date will be set after the last treatment.

- **If the recall date is overdue or is in the next 30 days**
  - This is where you set a recall date, the patient comes in, and when they have the appointment, the recall date gets moved on. If they have further treatment, it *doesn't* get moved on because the recall date is not yet overdue. This maintains the regular, interval-based recall cycle, even if patients have further treatment within that cycle. The period (such as 30 days) acts as a buffer during which recall considerations are ignored.
  - The 30 days allows some flexibility, depending on the scheme being run in the Practice. See "To Edit Recall Type Advanced Settings", below.

- **If one of these services was completed**
  - (Selectable from the controls)

  With this option, a recall is only created when *one* of a specified number of services has been completed (you can have multiple other appointments with no recalls triggered). For example, you want to do exams every 6 months regardless of other treatments, so you set recalls based on a list of possible services at those exams only.

**Advanced Settings:** See *Editing Recall Type Advanced Settings* (on page 77)
Editing Recall Type Advanced Settings

To Edit Recall Type Advanced Settings

In the Edit Recall Type screen (see "Edit Recall Type for Dentist or Hygienist" on page 75), click Advanced Settings.

The Edit Recall Type Advanced Settings screen displays:

Recalls Ahead of the Recall Date
You can change the settings all the way down to 0 days, in which case the Edit Recall Type screen option changes from

- If the recall date is overdue or is in the next 30 days

... to

- If the recall date is overdue

and the recall is activated only when overdue.

Automatically set patients to No Recall
You can simply specify all patients for no recall, or you may have a reason to identify specific patients for no recall.

For example, your Practice performs specialist services based on referrals from other Practices, and there are to be no patient recalls following these referrals, because these patients are recalled only by their referring Practices.

The trick is to identify just those patients that are referrals. This is done by means of a Query. Click in the text box to see controls for identifying and creating Queries.

IMPORTANT: By default this lists all Providers with Provider Type "Dentist", just as the Hygienist Recall Type parameters will display "Hygienist" Providers. However, this is only a default arrangement. You can re-assign Providers for Recall Type, which is particularly useful for Therapists, who have the Dentist Provider Type, but for practical reasons can be re-assigned to the Hygienist Recall Type because they are not permitted to do diagnostics. See Re-assigning Providers to Recall Type (on page 80)

SEE ALSO: Adding and Removing Providers (see "Adding and Removing Providers from the Recall Type" on page 78)
Adding and Removing Providers from the Recall Type

To add a Provider to Dentist or Hygienist Recall Type

1. Open the Configure Recall Parameters screen (see "Configuring the Recall Parameters Screen" on page 73).

![Configure Recall Parameters screen]

2. Click either Dentist or Hygienist Recall Type, depending on which Provider type you want to add. The Edit Recall Type screen (see "Edit Recall Type for Dentist or Hygienist" on page 75) displays:

![Edit Recall Type screen]

3. Click the Add button.

4. Select a Provider, and then click OK.
5. You will be prompted whether this Provider is to see Recall Prompts. Click either Yes or No.
   If YES, when this Provider saves a treatment, they will be prompted to specify Recall parameters for the patient.
   Only Providers with this setting will see the Recall Prompt. Receptionists will not see the Recall Prompt.

To remove a Provider from Dentist or Hygienist Recall Type
1. Open the Configure Recalls screen.
2. Click either Dentist or Hygienist Recall Type, depending on which Provider type you want to remove.
3. The Edit Recall Type screen (see "Edit Recall Type for Dentist or Hygienist" on page 75) displays.
4. Click the Provider name to be removed under Providers Assigned to this Recall Type, and then click the
   Remove button.
   You will be prompted "Remove this Recall Type Provider?".
5. Click Yes.
Re-assigning Providers to Recall Type

Before EXACT version 11, a Dentist Provider was locked into the Dentist recall type. Therapists were identified as Dentist Providers and had to be defined as Dentist Recalls.

From version 11, you can re-assign Providers for Recall Type, which is particularly useful for Therapists.

The principle for re-assigning is to delete the Provider from one assignment and then add the Provider to the other.

To re-assign a Dentist Provider to the Hygienist Recall Type

(For example, to specify a Therapist as the Hygienist Recall Type)

1. In the Recall Manager configuration (see "Configuring Recall Manager" on page 73), under the Dentist Recall Type, click the Provider name under Providers Assigned to this Recall Type, and then click the Remove button.

You will be prompted "Remove this Recall Type Provider?":

2. Click Yes.

3. Go to the Configure Hygienist Recall Type window and add this Provider (see "Adding and Removing Providers from the Recall Type" on page 78) to the Hygienist Recall Type list.

To re-assign a Hygienist Provider to the Dentist Recall type

Follow the same procedure as above, but from Hygienist to Dentist Recall Type.

Editing the Merge Fields

Purpose of the Merge Fields window:

- Use it to determine how the merge fields will appear in patient recall communications. This includes:
  - Combinations of Dentist and Hygienist recalls.
  - Family recalls.
  - Combined dentist and Hygienist Service (co-ordinated duties) - this must be activated. Click in this field to see the selection controls.
- This window provides a means of specifying whether Dentist and Hygienist recall appointments should be booked separately or in combination, which affects how Receptionists book recalls in the Appointment Book.

To edit the Merge Fields window

1. Open the Recall Parameters screen (see "Configuring the Recall Parameters Screen" on page 73) and click the Merge Fields button to display the Merge Fields window:
2. Type the text that will display for the [recall.type] merge field for a Dentist plus Hygienist appointment.
3. Type the text that will display for the [recall.type] merge field for a Family appointment.
4. Click in the Combined Dentist and Hygienist Service text box to display selector controls, and use these to select the appropriate service.
5. Click OK.

**Automating Recalls**

See also: [Recall Automation](http://portal.softwareofexcellence.com/video/recall-manager-3-7-automation-exact-v113)

**Overview**

EXACT can be configured to automatically send recalls by SMS, Email and / or EasyPost.

You can either send a default recall template to all patients or customise recall templates to match custom groups of patients.

You can configure EXACT to automatically run recalls every day, or specify that recalls will only be run manually from the Manage Recalls screen.

You can also simplify the recalls automation setup by not using Hygienists in automated recalls.

**To open the Recall Automation screen**

1. **Open the Recall Manager** (see "Opening Recall Manager" on page 16).
2. Click the Configure Recalls button:

   ![Configuration button](image)

3. From the **Recall Parameters Screen** (see "Configuring the Recall Parameters Screen" on page 73), click the Automation button.

**To configure EXACT to automatically run recalls every day**
To configure EXACT so that recalls can only be run manually from the Manage Recalls screen

When deselected, EXACT users need to manually click the Run Recalls button in the Manage Recalls screen. The recalls are then not as evenly spread as they are when run automatically.

To configure EXACT to either include or exclude Hygienists in automated recalls

This is deselected by default because the majority of practices do not send Hygienist recalls.

SEE ALSO: Recall Automation
http://portal.softwareofexcellence.com/video/recall-manager-3-7-automation-exact-v113
Configuring the Automated Recalls

See also: Recall Automation
http://portal.softwareofexcellence.com/video/recall-manager-3-7-automation-exact-v113

The broad steps to configure automated recalls are:

- Specify WHEN to contact patients.
- Specify the methods for HOW to contact patients, and which TEMPLATES to use for each method.
- For patients who do not have a preferred method for contacts, specify the preferred ORDER of contact methods (for example, first try SMS, then Email, then posted letter).
- Optionally add custom patient groups if you want specific people to be recalled by means of specific templates (for example, use a teen template for an Under 19s group).

To automate recalls

(Requires access rights to recall configuration)

1. Open Recall Manager either from Administration > Manage Recalls... or from a manually-created shortcut on your task bar:

2. Click the Configure Recalls button at the bottom right of the Recall Manager screen:

3. Click the Automation button in the Recall Parameters screen:

The Recall Automation screen displays:
The purpose of this screen is to specify whom to contact, when, how frequently, and what communications to send (SMS, Email, EasyPost). It only applies to patients who are due for recalls; it does not send to Patients who have booked.

Start by checking (ticking) the Run Recalls automatically checkbox.

You can setup multiple sequential custom recall actions. For example:

- o Next Month recalls all those due appointments next month,
- o This Month recalls all those who evaded recall last month, and are due appointments this month,
- o Last Month recalls all those who evaded recall in the first two actions action, and were due appointments last month.
- o 6 Months Ago recalls all those who evaded recall in all of the above actions, and were due an appointment 6 months ago.
- o 12 months ago is not a recall but a notification that the Practice will stop issuing recalls.

4. Specify WHEN:

Start by selecting when you will contact patients based on when their recalls become due.

The above screenshot displays Contact Points for Next Month, This Month and Last Month. However, you can easily create further Contact Points.

To create a Contact Point:

Click the Add Contact Point hyperlink: Add Contact Point.

Complete the details in the Contact Point Detail screen, and then click OK:

You will see a Select Contact Methods screen, for adding methods to the Contact Point (how EXACT will contact a patient):
5. **Specify HOW:**

Click a Contact Method on the left and click the `>>` button. For example, SMS:

![Select Contact Methods for recalls due 12 months ago](image)

A **Select Templates** screen immediately displays, from which you can specify which templates to send for single patient or for family:

![Select Templates for recalls due 12 months ago](image)

(In the above example we are working with the default **All Patients** group, for which we will be adding templates. However, what if you want to use **different** templates for some people within that grouping? Or what if you want to use a custom template per **Provider**?

In this case you need to **Add patient groups**, and specify the particular templates per group. When **EXACT** then sends recalls it will first try the custom group before trying the All Patients group. **See also: Using multiple custom templates (adding Patient groups)** (on page 88))

**Specify templates for the Contact Method:**

Any dropdown option that you leave blank will simply be ignored by **EXACT**.

As you highlight a dropdown, a selector appears next to it:

![Dropdown selector](image)

You then have the option to select a template from the dropdown menu or by clicking the selector and opening the View Templates window:
Select appropriate templates, until you have identified the templates that you require (leave boxes blank where you do not need templates):

Click **OK** to return to the Select Contact Methods screen, with your Method now correctly positioned at right:

6. Repeat this procedure for further Contact Methods.

7. **Check the ordering of your Contact Methods:**
   - When recalling, EXACT will attempt contacts in the specified order of Contact Methods, unless the Patient has a preference registered in the Patient File, in which case EXACT will use that preferred contact method.
For a Patient **without any registered preference**, EXACT will try to contact a patient by means of the first method, and if this fails, it will try the next, and then the next if necessary:

**To re-order the Automated recall Contact Methods**
Select a Method and then use the up/down arrows:

**To edit the Automated Recall Contact Method**
Select it and then click the Edit button:

- or -
You can also edit by clicking a contact method from the Recall Automation screen:
Using multiple custom templates (adding Patient groups)

This facility enables you to use multiple templates for SMS, Email or EasyPost recalls.

For example,

- Send teen templates to Under 19s.
- Send Provider-customised templates to regular patients of each Provider.

The way to achieve this is to create particular Patient Groups and match them to specific recall templates. So for example, for the Under 19s, 1) create an Under 19s group, 2) create a teen template for SMS, Email and/or EasyPost, and 3) specify that patients who meet the criteria of "under 19" are recalled by means of these teen templates only.

**To add a custom patient group and specify particular templates**

1. Open Recall Manager either from Administration > Manage Recalls... or from a manually-created shortcut on your task bar:

2. Click the Configure Recalls button at the bottom right of the Recall Manager screen:

3. Click the Automation button in the Recall Parameters screen:

4. The Recall Automation screen displays. All fields in this screen are hyperlinks. Click one of the Contact Methods for which you want to customise templates for a group:
5. Then select one of the Contact Methods from the Select Contact Methods screen:

The current Select Contact Methods screen displays:

Your aim is to Add another patient group, and specify different templates for that group.

**Note:** The group must already exist.

6. Click the Add another patient group hyperlink. Add another patient group.

7. Select a patient Group using either the Up/Down arrows or the selector box, and then click OK:

8. In the Select Templates screen you will then see a new section, and you may notice that the default group All Patients has now changed to All Other Patients. Add template/s where appropriate, keeping in mind that whatever is blank will be ignored:
How EXACT deals with multiple groups / multiple templates:

EXACT searches from the top down and acts only upon the first instance of a template type (Dentist, Hygienist, Dentist & Hygienist) that it discovers per Patient.

If the Patient belongs to more than one group, it will not send multiples of one template type (it will not for example send two dentist templates; it will only send the first valid dentist template it discovers when moving down the list).

Examples, following the above screen:

For a Dentist recall, EXACT does not match Belinda, aged 45, in the Under 19s group, but picks up the appropriate DENT-REC1 recall remplate for her in the All Other Patients Group.

For a Dentist recall, EXACT picks up the DENT-REC1-U19 recall template for Tim, aged 16, in the Under 19s Group, and looks no further for Dentist recall templates.

9. Repeat the above configuration procedure to add as many patient groups as you require. You may eventually have multiple patient groups:
The ordering of these Patient Groups is very important in determining which templates patients receive.

10. **To sort these Patient Groups**, select a group and then click the **Arrow buttons** in the small toolbar that appears:

11. **To delete a Patient Group**, select a group and then click the **Bin button** in the small toolbar:

**Simplified automation - Dentists only**

*To simplify automation configuration by disabling Hygienist recalls*

Automation setup is much simplified if you de-select the Hygienist option:

---

**With** Hygienist recalls:
Without Hygienist recalls:

- **Select Templates** for recalls due 6 months ago by S/HS.

<table>
<thead>
<tr>
<th>All Patients</th>
<th>Single Patient</th>
<th>Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dentist Templates</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>Hygienist Templates</td>
<td>*</td>
<td>*</td>
</tr>
<tr>
<td>General Hygienist Templates</td>
<td>*</td>
<td>*</td>
</tr>
</tbody>
</table>

**Without** Hygienist recalls:
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