



October 2020

## Newsflash

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### ***Want to Generate more End-of-Year Revenue?***

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

#### **Example Case:**

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

#### **Creating the Account Number File:**

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

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

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

**Phone (636) 256-7401**

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## Example Criteria:

Patient Recall Search

Find Patients that .....

1) have been seen in the last  Months

2) have NOT been seen recently, within  Months

3) are NOT Marked as Collections or Special

4) are NOT Marked as Cash Only

5) are NOT marked "NO-BILL"

6) do NOT have any Future Appointments scheduled before:

7) have a Treatment Plan

8) are marked as Active

9) Does have an Insurance Carrier

9b) Does Not have an Insurance Carrier

10) Account Balance is  Dollars or Less

11) Skip Patients that have YTD Insurance Payments over:

12) General screen Recall Sent Date is Blank or older than:  Months

13) are in the Age Range of:

Based on Insurance Payment Profile

14) Deductible has been met for the year

15) have Not reached Annual Max Benefit

16) use Default Good Ins Profile for Patient's without Ins Profile Numbers

17) has a Cell Phone Number

18) has an Email Address

Account Work File Number

Resp Acct Number

Patient Acct Number

Only Select Patient if User Flag Matches

1  2  3  4  5

Skip Patient if User Flags Matches

1  2  3  4  5

Run

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

Exit

Cordially,

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