



“Recalling the Patients you want Now!”

Webinar will start at Noon CDT
Please use Speakers, Head Set, or call Webinar
Phone Number
Keep your Audio Muted during Webinar

Sept. 20, 2012

Topics



- Update your EasyDent Software
- Evaluate your current Recall statistics
- Gathering complete information for Recall
- Types of Recall Available
Recall Cards, Labels, Quick Form Letters, and eMail
- Recall Date Triggers
ADA Codes, Scheduling Services
- How to zero in on patients for recall
- How to use report results for recall cards, labels, email, and Quick Form Letters
- Quick Review

Update EasyDent Software

- www.ezdent.com link also on bottom right of Primary Menu
- Select Technical Notes Link
- Note #18 “Internet Update Instructions”
- Call Data Tec for current Update Password

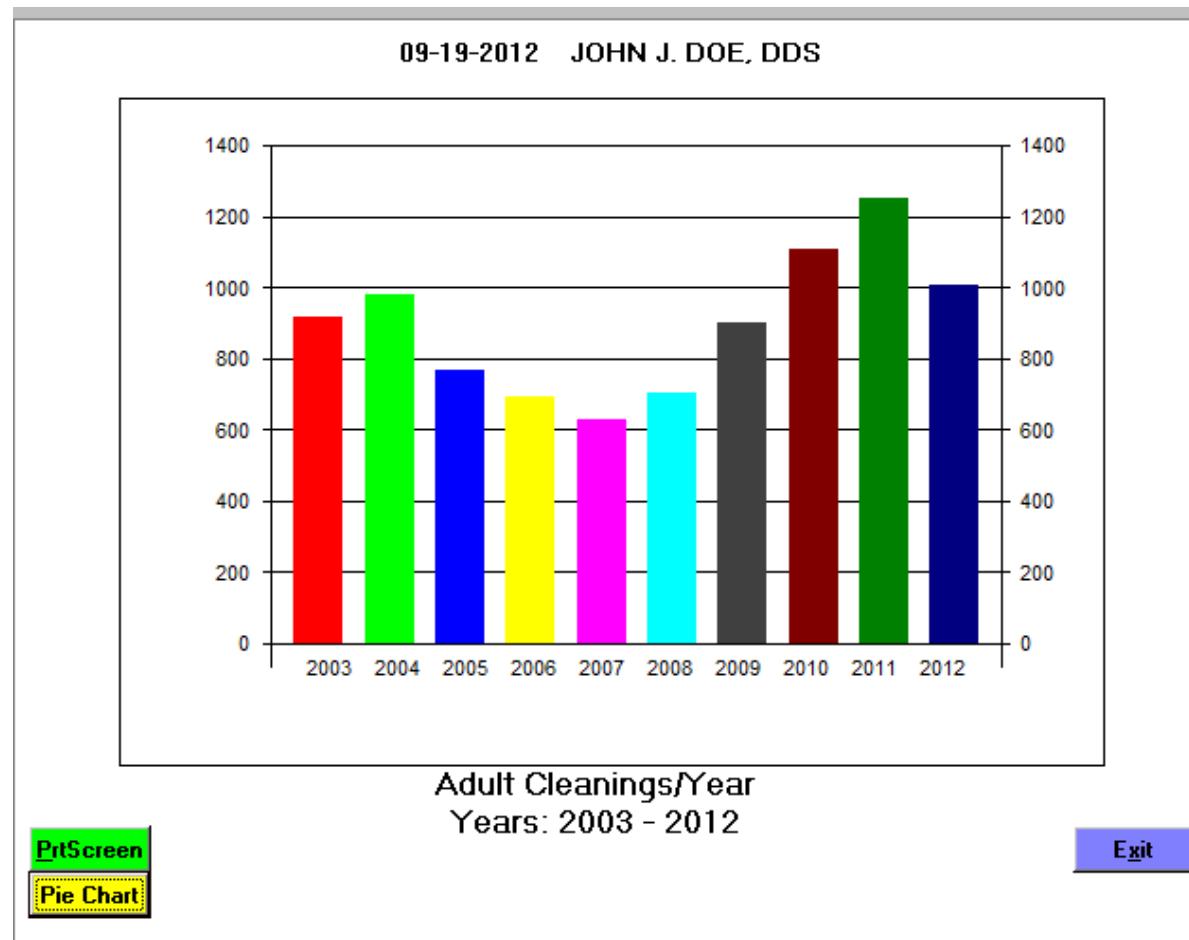
Recall Statistics

- From the Reports Menu select Monthly Reports, then Procedure Code Analysis, set the Date range within one year, use options button, then run Report.

JOHN J. DOE, DDS		Procedure Analysis 01/01/2012-09/30/2012			
ADA Category Summary Breakdown					
Category		Count	Average\$	Dollars	Percentage
Diagnostic	0000-0999	2833	50.44	142896.00	31.08
Preventive	1000-1999	1317	76.47	100708.00	21.98
Restorative	2000-2999	526	209.05	109960.00	23.98
Endodontics	3000-3999	70	189.22	13245.50	2.98
Periodontics	4000-4999	165	109.56	18077.00	3.98
Prost.Removable	5000-5899	172	189.27	32554.00	7.18
Maxillofacial	5900-5999			0.00	.08
Prost.Fixed	6000-6999	195	100.54	19604.50	4.38
Oral Surgery	7000-7999	277	79.73	22086.00	4.88
Orthodontics	8000-8999	18	0.00	0.00	.08
Adjunctive	9000-9999	86	19.41	1669.00	.48
Totals		5659		460800.00	

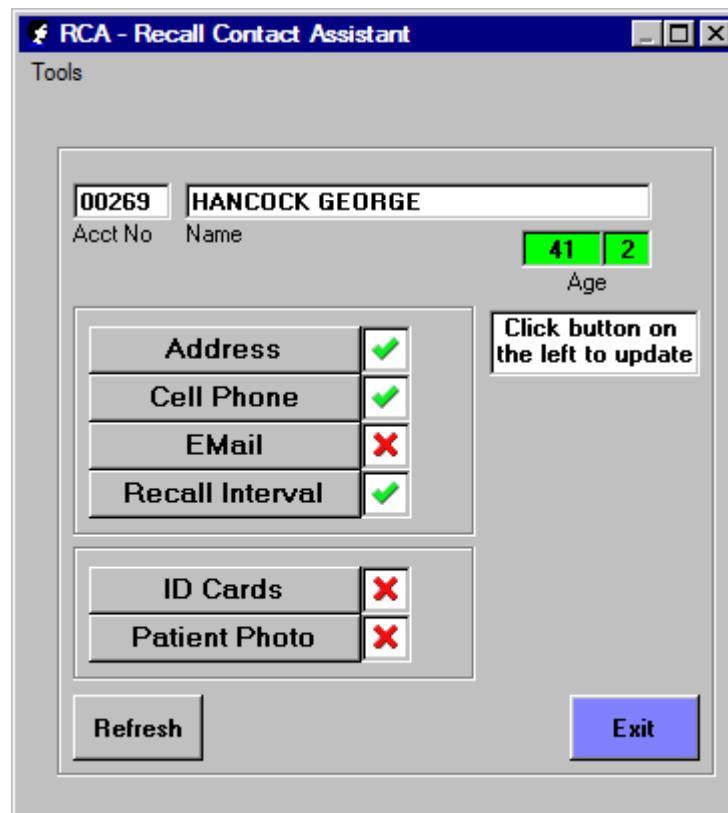
Recall Statistics

- From the Reports Menu select Management Graphics, 10 Year Graphs, Adult Cleanings, Child Cleanings, and/or Total Cleanings.



Gather Complete Info

- Make sure you have the necessary information for Recall.
- You can use the new Recall Contact Assistant, it quickly checks for key info and lets you enter it by checking the patient In and/or Out on the schedule.



Types of Recall

- Types of Recall Available

Recall Cards, Labels, Quick Form Letters, and eMail

<p>John & Mary Jones, DDS, Ltd. #55 North 5th Street St. Louis, MO., 63111 (314) 555-3333</p> <p>JUST A FRIENDLY REMINDER... You are due for a Dental Appointment. TREVOR POTTER 2908 South 9th Street Latham, MO 65050</p> <p>Your last exam was 03/22/2012</p> <p>Please call our office to schedule your appointment.</p> <p>ADDRESS CORRECTION REQUESTED</p>	<p>John & Mary Jones, DDS, Ltd. #55 North 5th Street St. Louis, MO., 63111 (314) 555-3333</p> <p>JUST A FRIENDLY REMINDER... You are due for a Dental Appointment. ELLIE POTTS 4574 Third Ave St. Louis, MO 63171</p> <p>Your last exam was / /</p> <p>Please call our office to schedule your appointment.</p> <p>ADDRESS CORRECTION REQUESTED</p>
<p>John & Mary Jones, DDS, Ltd. #55 North 5th Street St. Louis, MO., 63111 (314) 555-3333</p> <p>JUST A FRIENDLY REMINDER... You are due for a Dental Appointment. MARIO POWELL 8801 Washington St Eudora, MO 65645</p> <p>Your last exam was 03/26/2012</p> <p>Please call our office to schedule your appointment.</p> <p>ADDRESS CORRECTION REQUESTED</p>	<p>John & Mary Jones, DDS, Ltd. #55 North 5th Street St. Louis, MO., 63111 (314) 555-3333</p> <p>JUST A FRIENDLY REMINDER... You are due for a Dental Appointment. TREVOR POWELL 2206 Lake Ln Black, MO 63625</p> <p>Your last exam was / /</p> <p>Please call our office to schedule your appointment.</p> <p>ADDRESS CORRECTION REQUESTED</p>

Types of Recall

- Types of Recall Available
Recall Cards, **Labels**, Quick Form Letters, and eMail

Selena K. Patrick
751 Hill St
Fairfax, MO 64446

Bryson Owen
11691 Manchester Ave
Mine La Motte, MO 63645

Nicholas A. Guerrero
6673 Washington St
Adair, MO 63533

Jose N. Conway
12429 Eighth St
St. Louis, MO 63145

Erica Lambert
4204 View Ave
Zell, MO 63670

Camila I. Moreno
9371 First St
Elsberry, MO 63343

Bradley M. Hester
13216 Manchester Ave
Benton, MO 63736

Genesis N. Ortega
15392 Cedar Ave
Rea, MO 64480

Ariel P. Farmer
8746 Second Ave
Cpe Girardeau, MO 63701

Jackson K. Barber
14281 Ninth Ave
Sparta, MO 65753

Mary M. Farmer
1245 Fifth Ave
St. Marys, MO 63673

Ariel P. Farmer
8746 Second Ave
Cpe Girardeau, MO 63701

Laura F. Wood
1830 Washington St
Grandview, MO 64030

Ayden E. Keller
1991 Brentwood Rd
Caledonia, MO 63631

Tiffany N. Olsen
5011 Third Ave
BRM Springfield, MO 65890

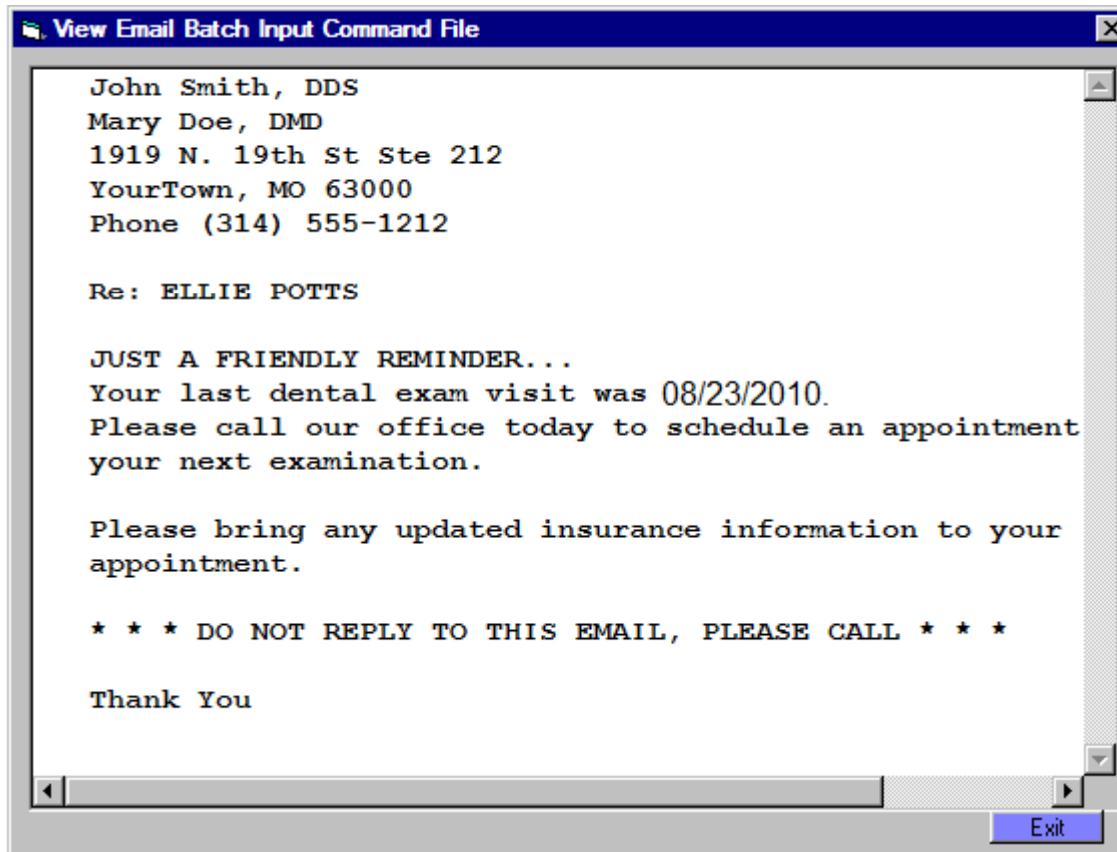
Types of Recall

- Types of Recall Available
Recall Cards, Labels, **Quick Form Letters**, and eMail

<p>JOHN J. DOE, DDS 2900 GRAND AVE ST. LOUIS, MO 63111 Phone: 314 887-1234</p> <p>09-19-2012</p> <p>TREVOR POTTER 2300 Elm Street Latham, MO 65050</p> <p>Dear TREVOR,</p> <p>In a routine check of our recall patients, my secretary has noted that you have not received a regular preventive dentistry examination for several months.</p> <p>Since we have not examined mouth recently, we assume and hope he is receiving the necessary dental care. I know you are concerned about dental health and understand the need for periodic examination.</p> <p>Please let us hear from you, either to make an appointment or to let us know that your family is receiving the proper care in another office. We are concerned about you and your dental health.</p> <p>Sincerely,</p> <p>John Doe, D.D.S.</p>
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Types of Recall

- Types of Recall Available
Recall Cards, Labels, Quick Form Letters, and **eMail**



Standard Recall Date Triggers

- ADA Codes marked in the Base Fee Schedule, typically Cleanings and Full Series of X-Rays

Fee Schedule 0										Name	Base Fees
ADA Code	Short Hand	Dollar Amount	Procedure Description	Tooth No/Surface	Insur Print*	New Pat. Recall	CRT Code	In Act HCFA	In Act	Note	Taxable
000481		0.00	Electron Microscopy Diag	NA NA	00481						
000482		0.00	Direct Immunofluoresence	NA NA	00482						
000483		0.00	Indirect Immunofluoresenc	NA NA	00483						
000484		0.00	Consult Slides From Elsew	NA NA	00484						
000485		0.00	Consult Include Prepslide	NA NA	00485						
000486		0.00	Accession Of Brush Biopsy		00486						
000502		0.00	Other Oral Path Proc By/r		00502						
000999		0.00	Unspecified Diag. Proced.	NA NA	00999						
001110		52.00	Adult Prophylaxis	NA NA	01110	X					
001120		38.00	Child Prophylaxis	NA NA	01120	X					
001203		19.00	Top. Appl. fluoride/child	NA NA	01203						
001204		19.00	Fluoride Treatment/adult	NA NA	01204						
001206		0.00	Topical Fluoride Varnish;		01206						
001310		0.00	Dietary Plan	NA NA	01310						

Standard Recall Date Triggers

- Scheduling Service Codes

Number	Description	Code	Slots	Recall		FillChar	Dollar Value	Form No.
				Dir	Color			
001	AD PROPHY, 0120	PRO	3	<input type="checkbox"/>	Y	B	.	
002	AD PRO, 0180	PROX	5	<input type="checkbox"/>	Y	B	.	
003	CHILD PROPHY	CPRO	3	<input type="checkbox"/>	Y	B	.	
004	FILL #	FIL#	4	<input type="checkbox"/>	N	P	.	
005	T BRK ANT/BIC	TBRK	4	<input type="checkbox"/>	N	R	.	
006	LOST FIL #	LFIL	4	<input type="checkbox"/>	N	P	.	
007	ADJ	ADJ	2	<input type="checkbox"/>	N	E	.	
008	CROWN #	CR	6	<input type="checkbox"/>	N	G	.	
009	TA #	TA	4	<input type="checkbox"/>	N	R	.	0
010	BRIDGE #	BR	9	<input type="checkbox"/>	N	G	.	0
011	DENTURE-FIN	DENT	5	<input type="checkbox"/>	N	A	.	0
012	PARTIAL-FIN	PART	5	<input type="checkbox"/>	N	A	.	0
013	TRY-IN	TRY	2	<input type="checkbox"/>	N	A	.	0
014	PERIO 1 OF 2	P1	6	<input type="checkbox"/>	N	G	.	0
015	RCT-ANT #	RCTA	5	<input type="checkbox"/>	N	G	.	0

Save Chgs **Scroll Up** **Scroll Down** **UnDo** **CANCEL** **SAVE/EXIT**

Zero in on Patients for Recall

- For normal monthly recall review you can use Report Menu
 - Recall Individuals
 - Recall Family Style
- For Overdue Patient use Report Menu then “Patient Recall Search” report.
 - Specify multiple criteria to find overdue patients.
 - View and/or print patient list
 - Generates Account Number file that can be used to print labels, recall cards, quick form letters, and/or send email.

Report Menu – Patient Recall Search

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) 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

Only Select Patient if User Flag Matches Skip Patient if User Flags Matches

1 2 3 4 5 1 2 3 4 5

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

Merge Recall with Quick Forms

How to Merge Quick forms with Patient Recall Search - List

- (1) Create the quick form letter that you want to send to your Patients.
- (2) From Reports Menu select the “Patient Recall Search”.
- (3) Once you have established your criteria run the report.
- (4) Read the text in yellow, it will tell you that you have created your patient list for Quick forms.
- (5) Go to your Forms menu and select "Quick Form Mail Merge" select the Form you want, check to update patient recall date, and print the letters.
- (6) Use “View Sample Form” to preview on screen.
- (7) When ready to print use “Print Forms Now” button.

Recall Labels

Patient Labels - Fill In Multiple Criteria

Social Sec No	<input type="text"/>	Dentist No	00	Location Code	<input type="text"/>
BirthDate	<input type="text"/>	Thru	<input type="text"/>		
Last Visit Date	<input type="text"/>	Thru	<input type="text"/>		
First Visit Date	<input type="text"/>	Thru	<input type="text"/>		
Next Recall Date	<input type="text"/>	Thru	<input type="text"/>		
Last Recall Date	<input type="text"/>	Thru	<input type="text"/>		
Balance Range	<input type="text"/>	Thru	<input type="text"/>		
Insurance Carrier	<input type="text"/>	Thru	<input type="text"/>		
YTD Insur Payments	<input type="text"/>	Thru	<input type="text"/>		
Birthdate Month	<input type="text"/>				
User Flags	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5
Patient Has Insurance	<input type="checkbox"/>				
Next Recall Month	<input type="text"/>	Next Recall Month	<input type="text"/>		

Use Generated Account Number File 210 Num Account Numbers in File

Options

- Eliminate Dependent Labels
- Print Last Name FIRST.....
- Put Account Number on Label
- Telephone Numbers On Label
- Leave Names all Cap Letters
- Use Resp Name if Present Not Pat Name
- Update Patient's Recall Sent Date

Patient Status - General Screen

Active All InAct NotPat

Restart Account Number

View Selection List before Printing

Print Labels Create Label File Help Exit

Recall Cards or Email

Recall Cards or Email

Start and End Dates Print or Email Format Name **RECALL01** Restart Account Num

Selection Criteria
00 Doctor Number to Select on or 00 for all

Based on Next Recall Date
 Based on Last Recall Date
 Use Generated Account Number File

Update Recall Sent Date on General Screen?
 Check if you want to Include CASH Only Patients

Appt Day Doesn't Matter (with or without appt)
 Appt Day Must be Filled In (must have an appt)
 Appt Day Must be Blank or 00 (has no appt)

Don't Print Card if Patient has Future Appointment Scheduled
 Update Recall Sent Date, But Don't Print the Cards
 Select Only Fee Schedule Zero!
 Skip Patients with Email Addresses when printing cards

Optional User Flag
Matches 1 2 3 4 5

Special for PDF Single File
Patient Status
 Active All
 InAct NoPat

Number Cards/Sheet
 4 Cards
 2 Cards

Pause Printing after this Number of Cards Print
 Special Print Option

The End

