

Recall

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Summary

Continuing Care and Recall are both features that allow you to reach your patients who are in need of a regular, return visit. You may call these return visits recall or recare.

Some practice management systems (PMS's) have the ability to track patients who are eligible for recall/recare by assigning a specific future date the patient should have their next recall appointment.

If you are using this feature within your PMS, then Recall is for you.

Note: We do not recommend using both the Continuing Care and Recall feature simultaneously in Patient Communicator.

When using Recall, you will set the future recall date within your PMS. Your system will see the patients recall date you have set and send your patient a reminder based on the settings in your recall notification set up.

A recall notification will never be sent to a patient that has a future scheduled recall appointment of the type you've set up in your PMS, ensuring that a patient will only receive a reminder when there is a need to schedule a future appointment.

Create & Enable a Recall Notification

Note: When creating and enabling a *Recall* notification, all of the following steps must be completed: Not setting or incompletely setting any step below may prevent messages from being delivered to your patients. Remember to name and set the preferred delivery day and time if different than the default settings.

You can recognize a Recall reminder in the Timeline view by their blue color within the *Automated Recall* tab.

To create an enable a recall notification follow the steps below:

1. Message delivery method: Choose any combination of *Email*, *SMS*, or *Voice* by toggling the buttons to the *ON*(green) position.

2. Enable: Turn on the notification by toggling the button *ON*(green).

3. When to send notification: Each notification allows you to determine when the notification will be delivered. Patient Communicator will look for the recall date you set for the patient in your PMS and deliver the notification at the time you set here.

In the example above, a notification is being sent to patients 2 weeks before the recall date set for the patient in your PMS. We will check our PMS every day to see which patients fall into this time frame and message any patient who does not have a future Recall type appointment.

4. Send at: The time of day the notification is to be sent.

5. Voice: Recall notifications have the option to deliver a voice message to the Patient's home phone. We recommend using the voice feature to your patients with no email or cell phone contact information to ensure that your recall message is delivered. To enable an automated voice call:

- **Call at:** Set the time of day to make the call
- **Speaker:** Select the voice to use
- **Language:** English is always default. You may choose Spanish, Mexico for a voice message in Spanish if Alice is chosen as Speaker. Choosing Spanish, Spain enables Conchita.
- **Call when:** Choose what contact information (or lack of) triggers a call
- **Option to call Office:** Will the patient be able to press a button to call the office telephone
- **Office Number:** Displays what phone number the patient will reach when Option to call Office is enabled



Voice Call Settings

Call at: 7:00 PM

Days Before: 2

Speaker: Cathy

Language: English, United States

Call when: Always Call

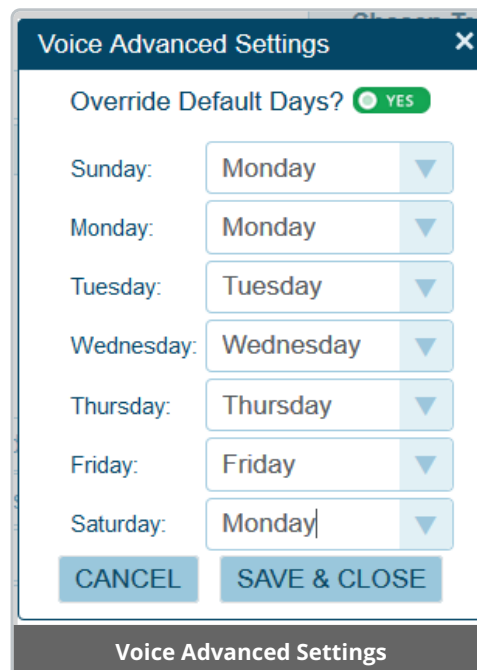
Option to call Office: Yes

Office Number: 555-555-5555

[Advanced Settings](#)

Voice Call Settings

- **Advanced Settings:** A practice may decide to send a voice call recall on a day other than scheduled. In the example below, the voice reminder call scheduled for Saturday and Sunday (left column) have been changed to the following Monday (right column).



Voice Advanced Settings

Override Default Days? ☒ YES

Sunday: Monday

Monday: Monday

Tuesday: Tuesday

Wednesday: Wednesday

Thursday: Thursday

Friday: Friday

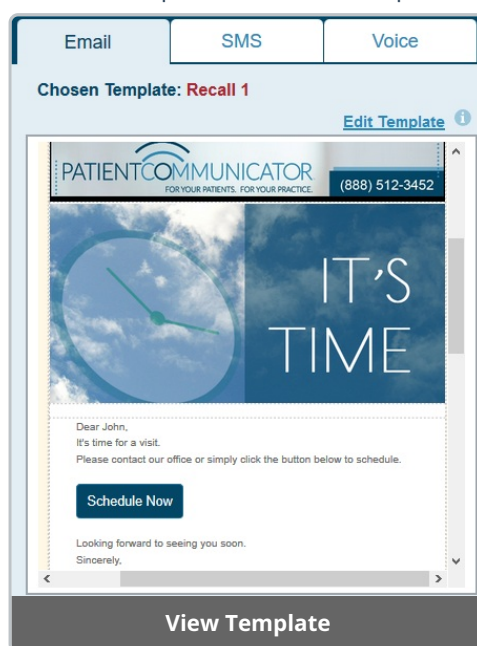
Saturday: Monday

CANCEL **SAVE & CLOSE**

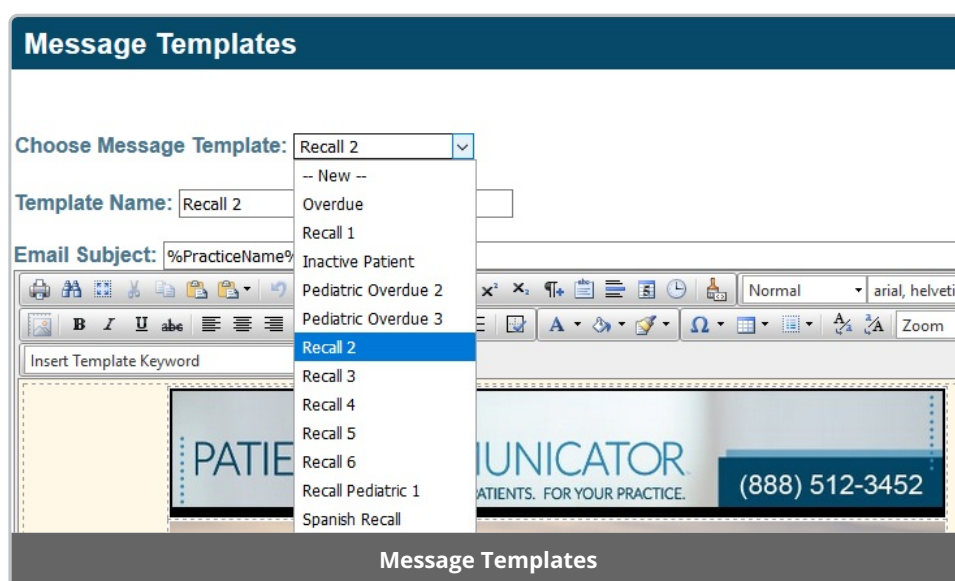
Voice Advanced Settings

6. Templates: Each notification will preload with a default template when the message delivery method is turned on.

- To view the current enable template, click the template tab in the notification for enabled delivery method. To change or edit the current template, click Edit Template.



- To change templates, choose a different template from the drop down menu in the Message Template screen. When done, click **SAVE & CLOSE**



After completing steps 1-6 above, the notification is enabled and will be automated on the next calendar day.

To edit or create new templates, see articles for [Email & SMS Templates](#) or [Voice Templates](#).

<End of Article>
