CHAPTER 5

Recalling Patients

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Recall schedules describe when a patient will be selected for a recall and, if they do not respond, how often and when to make other recall attempts.

Creating New Recall Schedules

1. On the OfficeMate main window, click Setup, and select Customization. The Customization window opens.
2. Click the Recall tab.
3. Click New Recall.
4. Type the name of the new recall schedule in the Recall Type text box.
5. Type the number of months until the patient will be recalled in the Months to Next Recall text box.
6. Type the number of weeks or months between the patient’s recall date and the notice that you are creating in the Renewal Notice Mailing Schedule # column.
7. Select Month(s) or Week(s) from the Period column drop-down menu.
8. Select After or Before from the When column drop-down menu.
9. Select the type of recall letter or postcard to print from the **Print Letters/Postcard** column drop-down menu.

**Note**
If there is no appropriate letter or postcard to select from the Print Letters/Postcard column drop-down menu, click **Compose Letter** to open CARE or the Maintain Documents window and compose a letter.

10. Repeat steps 3–9 to create additional new recall schedules.

OR

Click **OK** to close the Customization window.

**Note**
To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.
Modifying Recall Schedules

1. On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
2. Click the **Recall** tab.
3. Select a recall type from the **Select Recall Type** drop-down menu.

![Customization Window](image)

4. Modify the **Recall Type** and **Months to Next Recall**.
5. See **Creating New Recall Schedules on page 121**, steps 5–9, to modify the information in the **Recall Notice Mailing Schedule** table.
6. To delete a mailing schedule, select a line and click **Delete Line**.
7. To insert a new blank line above a completed line, select the completed line that you want to insert a new blank line above and click **Insert Line**.
8. Repeat steps 3–7 to modify additional recall schedules.

   OR

   Click **OK** to close the Customization window.

Deleting Recall Schedules

![Delete Warning Window](image)

**Note**

You can only delete recall schedules that are not linked to patients.

1. On the OfficeMate main window, click **Setup**, and select **Customization**. The **Customization** window opens.
2. Click the **Recall** tab.
3. Select a recall type from the **Select Recall Type** drop-down menu.
4. Click **Delete Recall**. The **Delete Warning** window opens.
5 Click **Yes** to continue.

![Customization window with Recall Type options]

6 Click **OK** to close the Customization window.

### Assigning Recall Dates to Patients

You can assign up to three recall schedules to a patient in the Patient Demographic window.

| Note | Before you assign recall schedules to a patient, see [Creating New Recall Schedules on page 121](#) to create a new recall schedule or [Modifying Recall Schedules on page 123](#) to modify an existing recall schedule. |

1. Open a patient record. For more information, see [Creating & Opening Patient Records on page 69](#).
2. Click the **Recall** tab in the Patient Demographic window.

#### Note
You can view the recall history for the patient in the **Recall History** box.

3. Select recall types from the **Recall Type** drop-down menus.
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Creating Recall Letters

4  To change the recall date, type or select the number of months until the next recall in the **Months to Recall** text box or type or select a recall date in the **Next Recall** text box.

**Note**  If the patient has an insurance plan with an eligibility period, the number of eligible months between exams will appear in the **Eligibility (months)** text box after you select a recall type.

Creating Recall Letters

This section tells you how to create recall letters to send to your patients including how

- To create a new recall letter, 125
- To modify a recall letter, 127

**To create a new recall letter**

1  Select a recall schedule and click **Compose** in the Customization window's Recall tab. For more information, see **Creating New Recall Schedules** on page 121.

OR

Click **Tasks** on the main window toolbar and select **Maintain Documents**. The **CARE from OfficeMate** or **Maintain Documents** window opens.

2  Click **Setup** and select **Text Files**. The **Text Files** window opens.

3  Click the **OfficeMate Documents** folder.
4 Click the **Recall** folder.

5 Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **New**.

   The **New Text File** window opens.

6 Type a title for the new text file in the **Title** box.

7 Click **OK**.

8 Type the letter in the word processing window.

9 Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **Save**.
To modify a recall letter

1. Select a recall schedule and click **Compose** in the Customization window’s Recall tab. For more information, see [Creating New Recall Schedules](#) on page 121.

   OR

   Click **Tasks** on the main window toolbar and select **Maintain Documents**. The **CARE from OfficeMate** or **Maintain Documents** window opens.

2. Click **Setup** and select **Text Files**.

   The **Text Files** window opens.

3. Click the **OfficeMate Documents** folder.

4. Click the **Recall** folder.

5. Click on the name of the text file that you want to modify.

6. Edit the text in the word processing window.

7. Click **File** on the CARE from OfficeMate or Maintain Documents window toolbar and select **Save**.
Printing Recall Correspondences

You can print recall correspondences any time that it is convenient. Follow the instructions below:

- To print recall correspondence, 128
- To print a list of patients that you want to recall, 131
- To print labels for patients that you want to recall, 133

▶ To print recall correspondence

1. Click **Tasks** on the OfficeMate main window toolbar and select **Correspondence**.
2. Select **Recall**. The **Process Recalls** window opens.
3. Type or select dates in the Selection Range **From** and **To** boxes.
4. Select the **Last Name** or **ZIP Code** Order radio button to sort the patients alphabetically by last name or numerically by ZIP code.
5. Select the **Select all names** check box if you want to print recall correspondence for all of the patients in the date selection range.
   OR
   Deselect the **Select all names** check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the **Starting Last** text box to print recall correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box,
OfficeMate will print recall correspondence for patients with last names that begin with G–Z.

6 Click **Start Selection**.
A list of patients meeting your selection criteria is displayed.

7 Click **Print**.

The **Report Printer Selection** window opens.
8 Click one of the following buttons:
   − **Print** to print the recall letters for the selected patients.
   − **Skip** to skip the current print selection and go to the next print selection.
   − **Test Print** to print a sample recall letter.
   − **Printer Setup** to set up the printer. For more information on setting up the printer, see **Setting Up the Printer on page 33**.
   − **Options** (for postcards) to select a printing method.

9 Click **OK** in the Job Completed window.

10 Click **Yes** in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.
To print a list of patients that you want to recall

<table>
<thead>
<tr>
<th>Note</th>
<th>Print lists using 8½” x 11” paper stock.</th>
</tr>
</thead>
</table>

1. Click Tasks on the OfficeMate main window toolbar and select Correspondence.
2. Select Recall.
   The Process Recalls window opens.

   - Click History to view the recall correspondence printing history.
   - Click Printer Setup to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, see Setting Up the Printer on page 33.

3. Type or select dates in the Selection Range From and To boxes.
4. Select the Additional Printing Listing check box.
5. Select the Last Name or ZIP Code Order By radio button to sort the patients alphabetically by last name or numerically by ZIP code.
6. Select the Do Not Print Letter/Postcards check box if you only want to print a list of patients and not the actual letters and postcards.
7. Select the Select all names check box if you want to print a list of recall correspondence for all of the patients in the date selection range.
   OR
   Deselect the Select all names check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the Starting Last text box to print a list of recall correspondence for patients meeting your selection criteria. For example, if you type “G” in the Starting Last
text box, OfficeMate will print a list of recall correspondence for patients with last names that begin with G–Z.

8 Click **Start Selection**.
A list of patients meeting your selection criteria is displayed.

9 Click **Print**.

The **Report Printer Selection** window opens.
10 Click one of the following buttons:
   - **Print** to print the list of selected patients.
   - **Skip** to skip the current print selection and go to the next print selection.
   - **Test Print** to print a sample list.
   - **Printer Setup** to set up the printer. For more information on setting up the printer, see **Setting Up the Printer** on page 33.

![Report Printer Selection](image)

11 Click **Yes** in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.

![Correspondence Printing Warning](image)

**To print labels for patients that you want to recall**

<table>
<thead>
<tr>
<th>Note</th>
<th>Print labels using Avery 5260 compatible white rectangular labels. You can purchase these labels from Medical Arts Press at 1.800.328.2179 or <a href="http://www.medicalartspress.com">www.medicalartspress.com</a>.</th>
</tr>
</thead>
</table>

1 Click **Tasks** on the OfficeMate main window toolbar and select **Correspondence**.
2 Select **Recall**.
   The **Process Recalls** window opens.

| Note | • Click **History** to view the recall correspondence printing history.  
   • Click **Printer Setup** to set up the printer or select a printer other than the default OfficeMate printer. For more information on setting up the printer, see **Setting Up the Printer** on page 33. |
|------|--------------------------------------------------------------------------------------------------|

3 Type or select dates in the Selection Range **From** and **To** boxes.
4 Select the Additional Printing **Labels** check box.
5 Select the Last Name or ZIP Code Order By radio button to sort the patients alphabetically by last name or numerically by ZIP code.

6 Select the Do Not Print Letter/Postcards check box if you only want to print patient labels and not the actual letters and postcards.

7 Select the Select all names check box if you want to print labels for all of the patients in the date selection range.

OR

Deselect the Select all names check box and enter a letter (if you are ordering patients by last name) or number (if you are ordering patients by ZIP code) in the Starting Last text box to print labels for patients meeting your selection criteria. For example, if you type “G” in the Starting Last text box, OfficeMate will print labels for patients with last names that begin with G–Z.

8 Click Start Selection.

A list of patients meeting your selection criteria is displayed.
9 Click Print.

The Report Printer Selection window opens.

10 Click one of the following buttons:
   - Print to print the list of selected patients.
   - Skip to skip the current print selection and go to the next print selection.
   - Test Print to print a sample list.
   - Printer Setup to set up the printer. For more information on setting up the printer, see Setting Up the Printer on page 33.
   - Options to select a printing type.

11 Click Yes in the Correspondence Printing Warning window if you are finished printing this group of recall correspondence and you want to update the patient demographic information and recall history.