PATIENT RECALL PROTOCOL SUMMARY

Use this protocol if a patient is not on the schedule for any reason so that they are not inadvertently forgotten about or otherwise overlooked.

**Reasons:**
1. No showed for appointment and didn’t call in to reschedule
2. Cancelled and didn’t reschedule for whatever reason
   - Busy
   - Sick
   - Don’t have schedule in front of them

**Tracking:** How to set it up in your schedule

- Create a recall column (typically the far right column)
- When patient misses appointment or chooses not to reschedule, put them on the recall column immediately
  - For next day if they no show
  - For 3 days if won’t schedule due for a reason requiring time. (changes depend on patient circumstance).

  **Important:** Tell them when you will call them again.
  - Give them a specific ‘recall column color’ if you schedule using colors

**Follow up:** Call patients on the recall column everyday

- Move them to next day if don’t reschedule
  - Do this up to 3 times after the day they missed (up to 5 days if you choose to be more aggressive)

- Only leave message on the first call the day they missed the appointment and the last day (3 week call) they are on the recall column. (Do not leave a message everyday).
  **Exception:** The caller from your office really knows the patient well or is concerned about their absence.

- If you don’t reach them after the allotted recall attempts put them on the recall schedule for 3 weeks after the first call. Give provider the patient’s phone number so he or she can call to make sure the patient is doing OK. Note in the system that you did so.
  - Before the 3 week call, look in your system or patient file to make sure there is not a flag indicating any issues you need to address with the patient while on the phone with them.

**Transfer:** If they don’t reschedule on the 3 week call, then they go into reactivation system

**Scripts:**

A simple call script for leaving a message after a missed appointment
Hi Bob, this is Teresa at Dr. Smiths office, we had you on the schedule for 2 o’clock today and it’s 2:10 now so wanted to make sure you are on your way or if for some reason you can’t make it and need to reschedule, give me a call I’ll try to squeeze you in today or tomorrow so that we can keep you on the treatment schedule Dr. Smith prescribed for you. I hope everything is OK, Thanks!

A script for speaking with a patient when you reach them on a reactivation call
Hi bob, this is Theresa from Dr. Smith’s office; just following up with you to see if you had time to schedule your next appointment (Add the following if leaving a message: Give me a call when you have time at 555-1212; have a great day).