

RECALLS

Recalls in Crystal allow you to track when a patient is due for an appointment and provides several ways to send out reminders.

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[Recall Alternatives \(outsourcing\)](#)

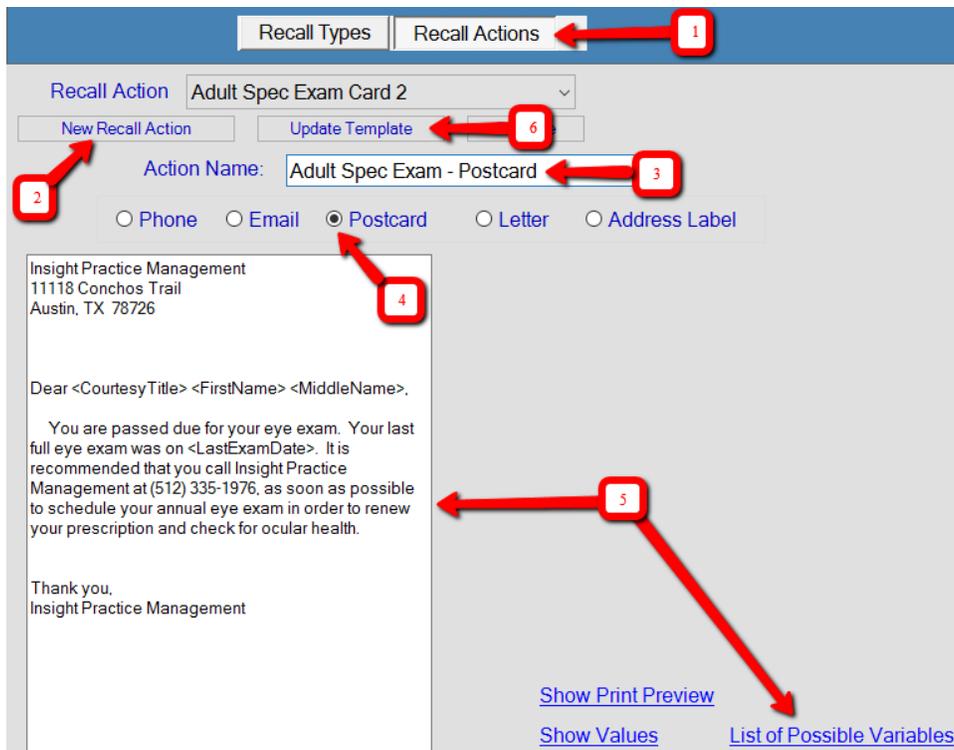
To set up the Recalls:

In the example below, I am going to create an Annual Spec Exam recall type that will prompt me to send a **postcard one month before** the one year mark. It will also remind me to **call the patient on the one year mark** if they have not yet scheduled an appointment. And lastly, the report will prompt me to **send an email to the patient at thirteen months** out if an appointment still has not been scheduled.

You can create multiple recall types as well as multiple contact types and times for each type.

To set this up, you'll need to set up your first Recall Action, **Postcard**.

1. Go to Admin > Recall, click on the Recall Actions tab.
2. Click New Recall Action.
3. Enter your action name. (*I named mine "Adult Spec Exam – Postcard".*)
4. Select Postcard.
5. In the white box, type the letter you want to print onto your postcard. Click on "List of Possible Variable" to get your merge variables like name, billing address, last exam date, etc.
6. Click Create Template.



Recall Types | Recall Actions **1**

Recall Action: Adult Spec Exam Card 2

New Recall Action | Update Template **6**

Action Name: Adult Spec Exam - Postcard **3**

Phone Email Postcard Letter Address Label

2

Insight Practice Management
11118 Conchos Trail
Austin, TX 78726 **4**

Dear <CourtesyTitle> <FirstName> <MiddleName>.

You are passed due for your eye exam. Your last full eye exam was on <LastExamDate>. It is recommended that you call Insight Practice Management at (512) 335-1976, as soon as possible to schedule your annual eye exam in order to renew your prescription and check for ocular health.

Thank you,
Insight Practice Management

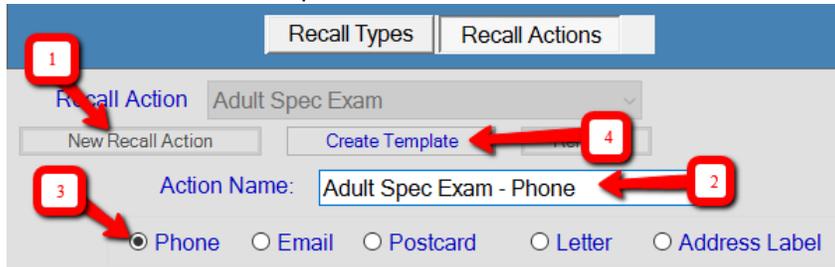
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[Show Print Preview](#)
[Show Values](#) [List of Possible Variables](#)

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Now I'm going to create my second recall action, **Phone**.

1. Click New Recall Action.
2. Enter your action name. (I named mine "Adult Spec Exam – Phone".)
3. Select Phone.
4. Click Create Template.



The screenshot shows the 'Recall Actions' tab in a software interface. At the top, there are two tabs: 'Recall Types' and 'Recall Actions'. Below the tabs, there is a 'Recall Action' section with a dropdown menu set to 'Adult Spec Exam'. Below this, there are two buttons: 'New Recall Action' and 'Create Template'. The 'Create Template' button is highlighted with a red circle and an arrow labeled '4'. Below the buttons, there is a text input field for 'Action Name' containing 'Adult Spec Exam - Phone', with a red circle and arrow labeled '2' pointing to it. Below the text field, there are five radio button options: 'Phone', 'Email', 'Postcard', 'Letter', and 'Address Label'. The 'Phone' option is selected, with a red circle and arrow labeled '3' pointing to it.

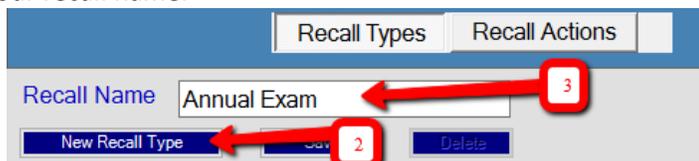
And finally, I'll create my third recall action, **Email**.

1. Click **New Recall Action**.
2. Enter your action name. (I named mine "Adult Spec Exam – Email".)
3. Select **Email**.
4. Enter your company name, your email address, and the subject of the email.
5. In the white box, type the message you want to send in your email. Click on **List of Possible Variable** to get your merge variables like name, billing address, last exam date, etc.
6. Click **Create Template**.

***To send an Email recall type, you must have your non-direct email set up in Crystal. See document "EMAIL SETUP IN CRYSTAL PM" for instructions on how to do this.*

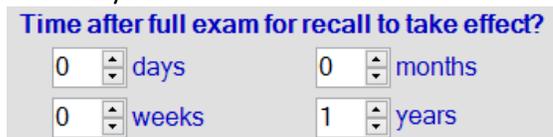
Now that I've set up my Recall Actions, I'm going to set up my Recall Types.

1. Click on **Recall Types**.
2. Create your first recall by clicking **New Recall Type**.
3. Enter your recall name.



The screenshot shows the 'Recall Types' tab in a software interface. At the top, there are two tabs: 'Recall Types' and 'Recall Actions'. Below the tabs, there is a 'Recall Name' section with a text input field containing 'Annual Exam', with a red circle and arrow labeled '3' pointing to it. Below the text field, there are three buttons: 'New Recall Type', 'Save', and 'Delete'. The 'New Recall Type' button is highlighted with a red circle and arrow labeled '2'.

4. Click **Add Another Action to Recall**.
5. Determine when you want to make first contact with the patient after their full exam. If, for example, you want to contact them 1 year after their exam, change the "Time after full exam for recall to take effect" to 1 year.



The screenshot shows a section titled "Time after full exam for recall to take effect?". It contains four dropdown menus with labels: '0 days', '0 months', '0 weeks', and '1 years'. The '1 years' option is selected.

6. Next, if your recall type is set at one year, you'll determine when you want each notification to be sent from the recall date. For example, in the "Add Action" section, I would choose my postcard template and set it to 1 month before recall date.
7. Click **Add New Action** and you'll see your recall action pull into the white box.

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Add Action

days
 weeks
 months

1

Before Before or After Recall Date

Adult Spec Exam - postca Recall Template

Add New Action

8. Follow the same steps to create a phone recall on the recall date and an email recall one month after the recall date.

Add Action

days
 weeks
 months

0

Before Before or After Recall Date

Adult Spec Exam - Phone Recall Template

Add New Action

Add Action

days
 weeks
 months

1

After Before or After Recall Date

Adult Spec Exam - postca Recall Template

Add New Action

9. Once all of your actions are set up, click **Save**.

Recall Name Annual Exam

Default Recall Date

Time after full exam for recall to take effect?

0 days 0 months

0 weeks 1 years

Time	Before/After	Recall Template
1 months	Before	Adult Spec Exam - p...
	On Recall Date	Adult Spec Exam - P...
1 months	After	Adult Spec Exam - p...

To Add a Recall to a Patient File:

Recalls can be added manually to a patient's account at any time by going to Patient > Additional Info. Under the Recalls section, you can click **Add Recall** and select the recall type and date. A patient is not limited to a single recall type. You can add multiple if necessary.

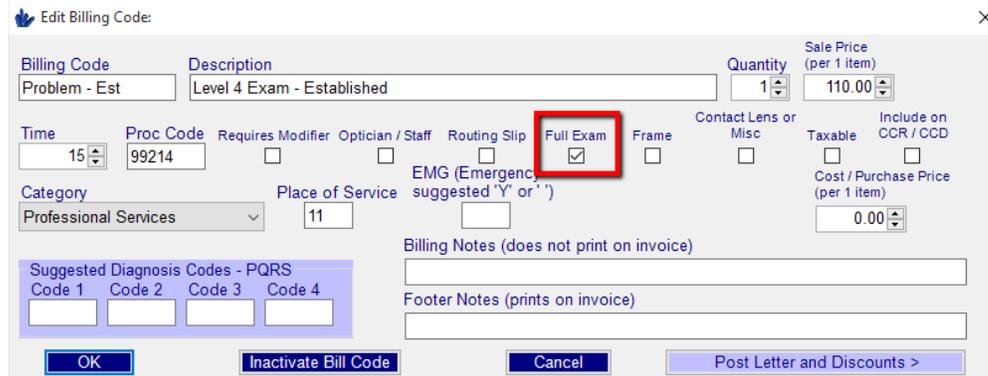
Recalls

Type	Date
Adult Spec Exam	11/05/2016

* Double click to change Date

RECALLS

You can also have Crystal prompt you to add recalls after a patient has been billed for a full exam. To set this up, make sure Full Exams are marked as such in Admin > Billing:



Edit Billing Code: X

Billing Code	Description	Quantity	Sale Price (per 1 item)
Problem - Est	Level 4 Exam - Established	1	110.00

Time: 15 Proc Code: 99214 Requires Modifier: Optician / Staff: Routing Slip: Full Exam: Frame: Contact Lens or Misc: Taxable: Include on CCR / CCD: Cost / Purchase Price (per 1 item): 0.00

Category: Professional Services Place of Service: 11

Suggested Diagnosis Codes - PQRS: Code 1, Code 2, Code 3, Code 4

Buttons: OK, Inactivate Bill Code, Cancel, Post Letter and Discounts >

When a patient is billed for a code marked as full exam, the last exam date shows in the Patient > Quick View tab. You can also manually add or change a date by double clicking in the date area.



Mr. DISCO, STU

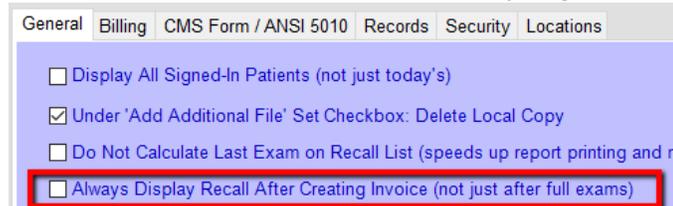
5581 Thomy Bristle Cove
Springfield, MO 65812
stu_loves_disco@gmail.com

Home # () - Cell # (817) 465-4983
Work # () - Other # () -

Preferred Contact Method: Cell Phone

Primary Location	1: Springfield
Insurance Balance	0.00
Patient Balance	0.00
Last Exam	11/02/2015
Last Paid	10/30/2015
Last Frame Order	10/30/2015
Last CL Order	
Courtesy Discount	0%

In Admin > Company > General tab, there is a setting that will have Crystal prompt you to set a recall after every single invoice. Most offices leave this blank and just get the auto prompts after full exams.



General | Billing | CMS Form / ANSI 5010 | Records | Security | Locations

- Display All Signed-In Patients (not just today's)
- Under 'Add Additional File' Set Checkbox: Delete Local Copy
- Do Not Calculate Last Exam on Recall List (speeds up report printing and n
- Always Display Recall After Creating Invoice (not just after full exams)

Recalls Report:

1. Go to Admin > Reports > Recall Report
2. Enter the date span you are going to recall and click **Generate Report**.
3. This report will first show you how many of each recall type there are.
4. You can click into this to get the full list of each patient and recall type.

For the **Phone** recall type, click Print to **Print/Send** to print a list of names and phone numbers to call or click **Print to File** to send the list to an Excel spreadsheet.

For the **Address Label** recall type, click the **Print Labels** button to print to Avery 5160 labels.

For the **Letter** recall type, click **Print/Send** to print out your letters. You can also use the **Send to Office Template** if you prefer to create your letter in Microsoft Word and merge your data into the Word document.

For the **Postcard** recall type, click **Print/Send** to print four postcards per page.

For the **Email** recall type, click **Print/Send** to send your email.

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Recall Alternatives:

If you prefer to outsource your recalls, Crystal PM integrates with several companies that can help.

1. Solution Reach - <http://www.solutionreach.com/COMPANY/Request-SR-Demo-Form?affid=Aff-SR-DR-Starbucks10&affname=Mark-Crowley-03763>
2. Websystem3 – <https://www.websystem3.com/Home/>
3. Patient Communicator – <http://mypatientcommunicator.com/>
4. 4PatientCare – <https://4patientcare.com/>
5. Demand Force – <http://www.demandforce.com/>

