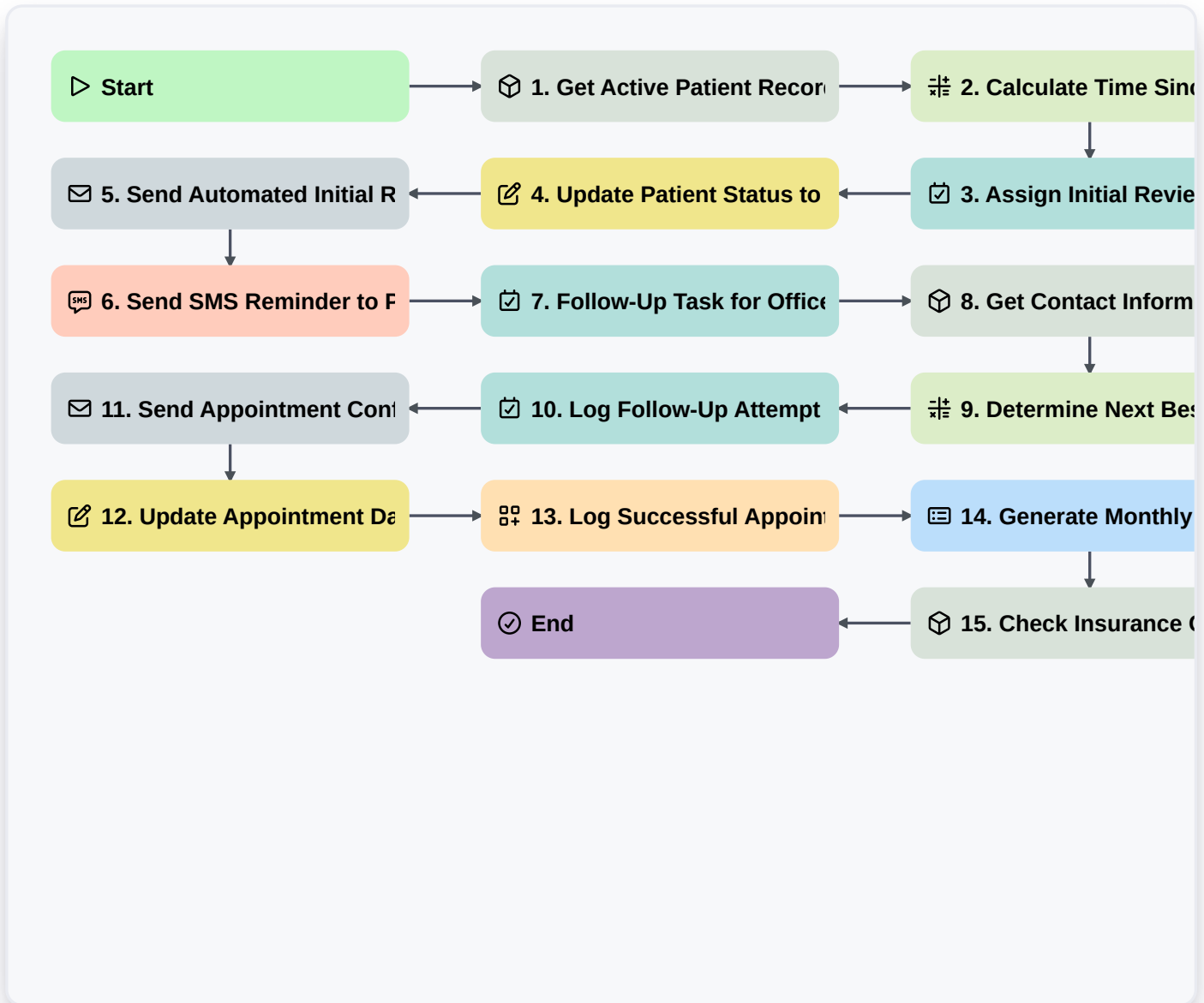


# Dental Recall & Hygiene Reminder Workflow: Boost Patient Retention



## ▶ Start

Start of the Workflow/Process.

## 📦 1. Get Active Patient Records

Retrieve all patients due for recall or hygiene check based on last visit date.

## 📅 2. Calculate Time Since Last Visit

Determine the time difference between today and the patient's last appointment date.

## 📝 3. Assign Initial Review Task to Hygienist

Create a task for the designated hygienist to review eligible patients and confirm service codes.

## 📝 4. Update Patient Status to 'Needs Contact'

Flag the patient record as requiring outbound communication.

## ✉️ 5. Send Automated Initial Recall Email

Send a personalized, branded email reminder to the patient suggesting a hygiene appointment.

 **6. Send SMS Reminder to Patients (Day 1)**

Send a friendly, brief text message reminder 7 days before the due date.

 **7. Follow-Up Task for Office Coordinator**

Create a task for the admin staff to call patients who haven't responded to the email/SMS.

 **8. Get Contact Information for Follow-Up**

Pull phone numbers and preferred contact methods for follow-up calls.

 **9. Determine Next Best Contact Attempt**

Logic to decide whether to call, text, or leave a message based on previous attempts.

 **10. Log Follow-Up Attempt**

Create a task for the staff member to document the call attempt details (date, outcome).

 **11. Send Appointment Confirmation/Reschedule Link**

Send follow-up email containing a direct link to book/reschedule their appointment.

 **12. Update Appointment Date on Patient Record**

Update the patient's next due date/appointment date upon successful booking.

 **13. Log Successful Appointment Booking**

Create a new entry recording the scheduled appointment details and provider.

 **14. Generate Monthly Recall Rate Report**

Compile a report showing the percentage of recalled patients who successfully booked an appointment.

 **15. Check Insurance Coverage Status**

Verify the patient's current insurance eligibility before offering services.

 **End**

Start of the Workflow/Process.