

Configure the FrontOffice+ Recall Feature

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Recall identifies patients who may be due for a follow-up appointment based on previous appointments and the configured Recall period. Before outreach, FrontOffice+ can check whether a patient already has a qualifying future appointment. Eligible patients can then enter the **Recall** outreach workflow and be encouraged to schedule their next visit.



This feature might require advanced view permissions.

Set up Recall

Turn on Recall

- Turn on **Enable Recall**.
- This activates the Recall functionality for the account.

Set the Recall lead time

- Select how many months FrontOffice+ should look back to identify patients due for follow-up.
- You can customize this by appointment profile.
 - **Example:**
 - Medication Management > 3 months
 - Annual Follow-up > 12 months

Set future appointment check days

- Define how far into the future FrontOffice+ should check for an existing appointment.
- If the patient already has a qualifying appointment scheduled within that period, FrontOffice+ doesn't recall them.
- This prevents unnecessary outreach to patients who are already scheduled.

Configure same appointment profile criteria

- Turn this setting on if FrontOffice+ should only consider future appointments with the same appointment profile.
- **On:** An appointment with a different profile doesn't prevent Recall.
- **Off:** Another qualifying future appointment may prevent the patient from entering Recall.

Example

- **Recall Lead Time:** 6 months
- **Future Appointment Check:** 60 days
- **Same Appointment Profile:** On

A patient had an eligible appointment 6 months ago.

- If the patient has the same appointment profile scheduled within the next 60 days > No Recall.
- If the patient doesn't have one scheduled > FrontOffice+ can begin the Recall workflow.

Before going live

Confirm:

- **Recall** is turned on.
- Correct appointment types are included.
- **Recall Lead Time** is configured for each appointment profile.
- **Future Appointment Check Days** are correct.
- **Same Appointment Profile Criteria** is configured appropriately.
- **Recall** messaging has been reviewed and approved.



If you require further assistance, contact our Customer Support team via in-app chat, email us at support@drchrono.com, or call us at (844) 569-8628.
