

Recall Journeys Configuration Guide

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Recall Journeys let clinics automatically text patients whose last appointment was a set number of days ago and who haven't booked their next visit. FrontOffice+ sends up to five messages (touches) inviting the patient to schedule. The sequence stops as soon as the patient books or declines, or when the journey window ends. The goal is to bring back patients who are due for a follow-up visit without staff having to call them one by one.

Key configuration options

General settings

- **Enable Recall Journeys:** Turns the feature on for the account.
- **Same Appointment Profile Criteria:** When turned on, FrontOffice+ only counts a future appointment with the same appointment profile as "already booked." For example, if a patient due for a Cleaning only has a Consultation booked, they still receive the recall.
- **Flexibility Days:** Extra days after the last touch during which the patient can still reply and book. Options are 1–90 days (default: 7). When this window ends, the journey closes for that patient.

Weekly email report

- **Weekly Email Report:** Sends a recap of **Recall Journey** activity every Monday.
- **Report Email Address:** The email that receives the report. If left empty, the account profile email is used.
- **Send Hour:** The hour of the day (on Monday) when the report is sent.

Journeys

- Each journey is an independent recall campaign. Select **Add Journey** to create one, the pencil icon to rename it, and the toggle to turn it on or off.
- **Past Days Reach:** How long after the original appointment the first message is sent (30, 60, 90, 180, or 365 days). For example, with 180 days, patients seen exactly 180 days ago become candidates.
- **Future Check Days:** How many days ahead FrontOffice+ checks the EHR for an existing booking (30–365 days). Patients who already have an upcoming appointment are skipped. Canceled, rescheduled, bumped, and no-show appointments don't count as booked.
- **Appointment Profiles / Providers / Locations:** Selection menus (**Select All / None**) that define which past appointments make a patient eligible. A patient qualifies only if the original appointment matches all three.
- **Number of Reminders:** Total number of messages (touches) in the sequence, from 1 to 5.

Custom messages

- **Touch 1:** Sent on the day the **Past Days Reach** is met ("Sent X days after original appointment").
- **Touch 2–5:** Each one is sent a set number of days after the previous touch. Touch 2 is counted from the first reminder.
- **Language:** You can edit the **English (EN)** and **Spanish (ES)** versions separately.
- **Labels:** Insert the patient's name (first, last, or full), mobile number, and the office name or phone number.
- **Length:** Each message can be up to 300 characters.

How the patient responds

- **Yes:** FrontOffice+ continues the conversation to book the appointment.
- **No:** FrontOffice+ thanks the patient, shares the office phone number, and stops the journey.
- **Replies after the window ends:** FrontOffice+ tells the patient the scheduling window has passed and asks them to call the office.



- **Required filters:** You can only turn on a journey if it has at least one appointment profile, one provider, and one location selected.
- **Conflict warning:** A warning icon appears if two journeys share the same profile, provider, and location combination, because the same patient could be targeted twice.
- **Account filters:** The account's excluded appointment profiles, providers, locations, and rooms are also respected.

Example

- **Scenario:** A dental practice wants patients seen for a Cleaning six months ago to come back for their next one.
- **Setup:** Turn on **Recall Journeys** and **Same Appointment Profile Criteria**. Add a journey named "6-Month Cleaning" with:
 - **Past Days Reach:** 180 days
 - **Future Check Days:** 60 days
 - **Appointment Profile:** Cleaning, with all providers and locations
 - **Number of Reminders:** 3, with Touch 2 after 7 days and Touch 3 after 14 days
- **Outcome:** Every day, FrontOffice+ finds patients whose Cleaning was exactly 180 days ago. It skips anyone who already has a Cleaning booked in the next 60 days and texts the rest. Patients who reply **Yes** are guided to book, and the sequence stops as soon as they do.

Before going live

Confirm:

- **Filter accuracy:** The selected appointment profiles, providers, and locations only cover visits that actually require a recall.
- **No overlapping journeys:** No journey shows the conflict warning, so patients don't receive duplicate recall messages.
- **Timing:** **Past Days Reach** matches the practice's recall interval, and the touch spacing isn't too aggressive for patients.
- **Message review:** The messages for each touch are reviewed in both **English** and **Spanish** (if used), include the office phone number, and stay under 300 characters.
- **Report recipient:** The **Weekly Email Report** goes to the person who follows up on recall results.



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