

## Excel TC Statistics & Will-Call-Back Control

### EXAM: Will Call Back control

- ☐ If the patient/family is reluctant to start or make future appointments they are placed on Will Call Back (WCB) status and a "1" is entered into the WCB column on the Excel spreadsheet.

DOCTOR		JANUARY				
NEW Pt. EXAM Pt. Last, First Name	Exam Date	Place a "1" in Cell, NOT a CK or X				
		Referral		Outcome of Exam		
		DDS	Non-DDS	No Tx	WCB	OBS
Example, Johnathan	03/13/22	1			1	

- ☐ In order to let the patient/family feel they are making the decisions about the follow-up communications, the TC asks them,
 

"Would it be all right if I called you to find out what your decision is?"
- ☐ If they answer "Yes" the TC asks,
 

"Would you rather me call or text you? and What is the best number to reach you?"
- ☐ The TC notes on the Excel spreadsheet, the reason for *not* starting now along with the contact date and phone number and whether to Text or Call them.

Reason for No-Tx or Will Call Back	Best phone number to Call or Text	Text or Call	Date to Text or Call Pt/Family	Made Contact? Yes or No	Date WCB Letter Sent	Date to send 6-Mo Letter
mom waiting for insurance information	1-610-435-1634	T	03/18/22	No	03/20/22	09/20/22

- ☐ If the patient/family would rather not be called or texted, the TC *notes* that in the "Best phone number to Call or Text" cell along with a date in the "Date to send 6-Mo Letter" cell
- ☐ If you schedule records after the Exam and the TC cannot get in touch with them on the text or call date, she sends a "Records Will-Call-Back, Follow-up" letter.

### Records Will-Call-Back, Follow-up letter

Dear X:

Re: Patient's Full Name

Thank you for your participation in (Pt's. 1st name)'s orthodontic examination, at which we indicated that (he/she) would benefit from orthodontic treatment.

In order to make a complete diagnosis and plan the best treatment for (Pt's. 1st name), we require a complete set of diagnostic records.

Please call me as soon as possible to set up your appointment for (his/her) diagnostic work-up, the results of which will be explained at your Tx Consult visit.

Thank you again, and if you have any questions please give me a call.

Sincerely:

(TC's Name) for Dr. Braceman

- ☐ The TC calls or texts the Exam WCB patient on the agreed date and convinces them to start. If the TC cannot reach them after a few days she enters a "No" in the "Made Contact" cell and sends a "Will Call Back Follow-up Letter" and notes the date sent in the "Date WCB Letter Sent" cell.

## Will-Call-Back Follow-up Letter

Dear X:

Re: Patient's Full Name

Thank you for your participation in (Pt's. 1st name)'s orthodontic examination and records, which helped us to diagnose and plan (his/her) orthodontic treatment needs.

As we mentioned at your last visit, this is the best time for you to start treatment, to allow us to solve the orthodontic problems in the best manner possible. Please call me within a week or two to tell us of your decision. Thank you again, and if you have any questions about treatment, please call me.

Sincerely:

(TC's Name) for Dr. Braceman

- ☐ Note the date in 6 months to send the 6-Mo letter in the “**Date to send 6-Mo letter**” cell. Also list these patients on the Recall List six months into the future as a reminder to the TC to contact them. To make sure all 6-Mo contacts are made and the letters are sent, the receptionist reviews that month’s spreadsheet and lists all patients to be contacted on the Recall Control Listing for that month for that office and doctor.
- ☐ If the TC cannot contact them in six months she sends a “**6-Month, WCB Follow-up letter**” and makes any notes in the “**Phone or Text or Letter Follow-Up Notes**” cell.

## 6-Month, WCB Follow-up Letter

Dear X:

Re: Patient's Full Name

It has been about six months since we discussed the need for (Pt's. 1st name)'s orthodontic treatment. It is important to start (his/her) treatment at this time to obtain the full benefits of growth and development. If we delay any longer, we may have to take current records to re-evaluate the case, causing unnecessary expense.

We will be happy to assist you in any way we can, to help you realize that (his/her) present and future oral health may be impaired if the orthodontic problems are not resolved.

Please call me at your convenience; thank you.

Sincerely:

(TC's Name) for Dr. Braceman

- ☐ If the patient starts their start date is noted in the “**WCB START Date**” cell, which should have a “1” in the “**WCB**” cell next to it.

Phone or Text or Letter Follow-Up Notes	W C B	WCB START Date
Dropped insurance, waiting for new INS policy	1	10/15/22

**The same procedures above used for Exam WCB follow-up are used for the Tx Consult WCB or the OBS-Recall *ready to start WCB* control.**