

# Boost Patient Visits Leveraging the Recalls & Online Scheduling Module

### Webinar Goal

A hands-on working session where you'll log into your EZDERM PM account to set up your Recall Settings and follow along with a test patient.

By the end of our session, you'll feel confident training your staff on how to add patients to your recall list right away!

## Housekeeping

- This session will be recorded.
- Please ask questions via the question box and Erica is on stand by to address and we will also pause to address live!



### **Recent Release Recap**

- RX History Tab on PM
- New RX Report
- Ability to add Patient Favorite Pharmacy from Summary Page on PM
- Letter Template Creation on PM (Check Out and right click on any appointment)
- Ability to Search Treatment Plan by ICD-10 and CPT Code
- Sadio and EZLINK Last Activity Pop-Up

Demo Practice	Patients > Barbara Tho	mpson						Ca	
Dashboard	Hard of hearing								
12 Schedule	Summary Demographics	Insurance Profile Financials	Encounters Claims	Statements D	Documents To-Do's Re	calls Notes and Alerts 🛕	Care Team	RX Histo	
Patients	Q Prescribed								
Check Out	Rx Name	Sent By	Pharmacy	Rx C	Order Status	Rx Printed	Sent Date	Activ Log	
Cart	Acne keloidalis								
✓ To-Do's	cyclosporine 100 mg capsule			Crea	ated, Not Sent Electronically	No			
_	minocycline 100 mg capsule			Crea	eated, Not Sent Electronically	No			
Recalls	Acne keloidalis, Acne vulgaris								
S Billing 776	doxycycline hyclate 100 mg capsule			Crea	eated, Not Sent Electronically	No			
4	Acne vulgaris								
Payments	Duac 1.2 % (1 % base)-5 % topical gel			Crea	eated, Not Sent Electronically	No			
🖙 ERA	isotretinoin 20 mg capsule			Crea	eated, Not Sent Electronically	No			
s) Refunds -	Tazorac 0.05 % topical gel			Crea	eated, Not Sent Electronically	No			
	Aczone 5 % topical gel			Crea	ated, Not Sent Electronically	No			
Reports -	spironolactone 25 mg tablet			Crea	ated, Not Sent Electronically	No			
	E								

### Sending Batch Recall Emails from the PM

Click to go back, hold to see history zderm.com/recalls x) Ø @ 🗢 🖸 | Relaunch to update : 🔡 M Inbox 😰 Pipedrive 🤣 EZDERM 🚱 DEMO 💲 SiriusXM 🗅 Applications 🗅 Forms 🗅 Responses 🗅 HR 🗅 Product 🗁 CS 🗁 Sales 🗁 Social 🗁 Finances 🗁 Recruiting 🚳 ChatGP1 All Bookmarks Recalls Demo Practice Clinics 7 selected Q Overdue Change Recall Status Le Accounts Dation 2 Prol Emails are currently Stephany Restrepo Nec 2/20/2024 10/15/2024 EZDERM Doctor, MD (239) 438-8327 3456 Seminole... srestrepo@ezd. Dashboard Override Email Message Stephanie Achesor 2/27/2024 Damo Liner MD (201) 602-4659 127 Centennial shall1262/8cm sent manually by Send Email ~ Tiffany Jones 1/12/2025 EZDERM Doctor MD (252) 867-5200 12245 an Patients ~ Juniper Wilson 1-week follow-up 01/13/2025 02/10/2025 03/13/2025 Genera EZDERM Doctor, MD (269) 413-3343 123 Pine Dr. Fe., kwils your practice. 02/10/2025 03/13/2025 EZDERM Doctor, MD (269) 413-3343 123 Pine Dr. Fe. Check Out Juniper Wilson -month follow-up 01/16/2025 Genera Chelsie Smith Acne vulgaria I-month follow-up 01/23/2025 02/17/2025 03/04/2025 Genera EZDERM Doctor, MD 4850 Tamiami ... chelsie757@q., Englis E Cart EZDERM Doctor, MD (269) 413-3343 123 Pine Dr, Fe., kwilson@ezder., English Mobile Phone Juniper Wilson 1-month follow-up 02/06/2025 02/10/2025 03/13/2025 Genera We're working on To-Do's Showing 7 of 7 entries automating this 2 Recalls process in a future Billing 775 update, along with Payments ⇒ ERA adding SMS (s) Refunds capabilities. Reports 🚄 Custom Reports Prescription Reports Audit Log 📕 Fax Log Export / Import CPT copyright 2025 American Medical Association. All Rights Reserve Designed with Love in the USA G Copyright © 2025 Powered by OPSRM

### **Creating Recalls**

There are 3 places where you can create a recall for a patient:

- 1. Linear Progress Note on the EHR (Follow Up Icon) 🛟
- 2. Check Out Tab (EHR or PM)
- 3. Patient Chart > Recalls Tab (EHR or PM)

### **Action Items:**

Create a recall for a test patient who has your email in their profile > send a recall

	Demo Practice	Check Out > Recall for Barbara Thompson A
-	Dashboard	Cart Follow Up Recall Letters
12	Schedule	Thursday, February 19, 2026
Ð	Patients	
=	Check Out	Create Recall
Έ	Cart	
	To-Do's	
) ()	Recalls	

## Sending Individual Recall from PM

	Demo Practice	Patients > Barb	ara Thompson									Cart
Da	ashboard	Hard of hearing										-
12 Sc	chedule	Summary Demogr	aphics Insurance Profile	Financials	Encounters	Claims	Statements	Docum	nents To-Do's	Recalls	Notes and Alerts 🛕	Care Team
🗾 Pa	atients	RX History		~								
CH	heck Out	✓ 1 selected	Q =	Barbara	Thompson (BAT	H0044)						Create Recall
📜 Ca	art	Due date: 02/19/2 No Problem(s) 1-year Skin Check	026	1-year Sk	rin Check						Created by: EZDERM	Doctor MD
✓ To	o-Do's		Change Recall status > Schedule appointment >	Provider					Due Date			
🕥 Re	ecalls		Override Email Message	EZDERM Do	ctor, MD			X ¥	02/19/2026 Recall Status			12
			Send email	Problem(s)				Ŧ	Active			*
s Bi	illing 775 🔹					chedule yo	ur annual skin c	heck. Reg	gular screenings a	re essential f	or early detection and ma	aintaining
Pa	ayments			healthy skin.	ur proforrad time	V011 000 00	nyoniontly opho	dulo oplir	aa at https://azdar	m com/ or o	all us at 877-443-9337.	
⇒ EF	RA			To secure yo	ui preferred time,	you can co	inveniently sche		ne at https://ezdei		an us at 677-445-5557.	
s) Re	efunds 👻			Internal Note								
	eports 👻			Created on: 0	2/19/2025 07:41	:06 PM						
🚄 Ci	ustom Reports											Save
🖹 Pr	rescription Reports 🔍											
E Au	udit Log			Comments His	story							
Fa	ax Log			Comment								
. <sup>↓</sup> ↑. Fx	xport / Import 🗸 👻											

## Sending Individual Recall from EHR

		Barbara Thompson (¥ 44   07/04/1980) +	- Close
Ŧ	Recalls	Recall Type 1-year Skir	1 Check
Q		Due Date 2/19/2	2026 >
	Due date: 02/19/2026	Provider EZDERM Doctor	, MD >
Send Email	No Problem(s) 1-year Skin Check	Recall Status A	ctive >
	i your okin oncok	Problem(s)	>
		Created by EZDERM Doctor, MD on February 19, 2025 at 7:4	1:06 PM
		EMAIL MESSAGE	
		This is a friendly reminder to schedule your annual skin check. Regular screenings are essential for early detection and maintaining healthy skin.	
		To secure your preferred time, you can conveniently schedule online at https://ezderm.com/ or call us at 877-443-9337.	>
		We look forward to seeing you soon!	
		INTERNAL NOTE	
			>
		Comment(s) History Add Comment	

## Schedule Appt for Recall

		Barbara Thompson (\$44   07/04/1980) + Cl	lose
▼	Recalls	Recall Type 1-year Skin Chec	:k
Q		Due Date 2/19/2026	>
9/2026	Ochochdo	Provider EZDERM Doctor, MD	>
) eck	Schedule appointment	Recall Status Active	>
		Problem(s)	>
		Created by EZDERM Doctor, MD on February 19, 2025 at 7:41:06 PM	М
		EMAIL MESSAGE	
		This is a friendly reminder to schedule your annual skin check. Regular screenings are essential for early detection and maintaining healthy skin.	
		To secure your preferred time, you can conveniently schedule online at https://ezderm.com/ or call us at 877-443-9337.	>
		We look forward to seeing you soon!	
		INTERNAL NOTE	
			>
		Comment(s) History	
		Add Comment	

### Link Recall to Appointment

New Appointment 🛕 First Available Appointment 5 Hard of hearing Q Patient Barbara Thompson (F, Jul 04, 1980, BATH0044) Clinic Status LA Derm Scheduled Provider Not Arrived Yet Demo User, MD Date of Service Chief Complaint 02/20/2025 12 Other Start Time End Time Appointment Type 01:30 PM 01:35 PM General **Referring Physician** Recall John Smith, MD 02:00 Vincent (V 1-year Skin Check (02/19/2026) Established Patient Prior Authorization O New Established Appointment Note **Billing Note** Appointment Reminder Note 🗇 A photo ID is required for all patients. Please make sure we accept your insurance

## Setting Up Recall Types

Click on Your Logo in upper left corner > General Settings > Recall Types

- Only Admin users can
  create and edit recall types
- System has default types already created

### Action Items:

- Review default Recall Type email messages
- Add new Recall Types

	. ⊡ Demo Practice	Recall Types	New Recall Type
	🔔 My Profile 👻	٩	
	Billing Configurations	1-month follow-up	
	General Settings	1-week follow-up	
	General Info Security	1-year Skin Check	
	Consents	2-month follow-up	
	HIPAA Consent Resources	2-week follow-up	
	Appointment Types	3-month follow-up	
	Recall Types Access Permissions	3-week follow-up	
	Contacts	6-month follow-up	
	Ez Check In Settings	6-week follow-up	
	🄅 Financial Settings 👻		
	Clinics		
	Accounts		
	Dashboard		
- 1	10 Schedule		

### **Increase Your Email Open Rate**

Personalize the email address from which your practice's email communications are sent.

#### **Action Items:**

Email <u>techsupport@ezderm.com</u> with your preference for the following 3 items: Practice Name, Short Practice Name, and Sender Name

#### Example:

Practice Name: Clear Skin Dermatology and Aesthetic Solutions Short Practice Name: ClearSkinDermatology Sender Name: Clear Skin Dermatology and Aesthetic Solutions

**Customized email address:** "From: Clear Skin Dermatology and Aesthetic Solutions <clearskindermatology-noreply@sadio.com>



### Get Appt Requests Faster via Online Scheduling

When patients receive the email that it is time for their appointment, allow them to book directly on your website via EZDERM's online scheduling module.

#### **Action Items:**

- Email <u>customersuccess@ezderm.com</u> to learn more about turning online scheduling on for your account
- If you already have it activated, add your practice website to the email reminder text.

