

# 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 Thompson							Cart
Dashboard		Hard of hearing							
Schedule		Summary Demographics I	nsurance Profile Financials	Encounters Claims	Statements	Documents To-Do's Recalls	Notes and Alerts 🔺	Care Team	RX History
Patients		Q. Prescribed							Ψ
Check Out		Rx Name	Sent By	Pharmacy		Rx Order Status	Rx Printed	Sent Date	Activity Log
📜 Cart		Acne keloidalis							
✓ To-Do's		cyclosporine 100 mg capsule				Created, Not Sent Electronically	No		0
Decelle	Decelle	minocycline 100 mg capsule				Created, Not Sent Electronically	No		0
Recalls	Recalls	Acne keloidalis, Acne vulgaris							
\$ Billing (776	· ·	doxycycline hyclate 100 mg capsule				Created, Not Sent Electronically	No		0
4		Acne vulgaris							
Payments		Duac 1.2 % (1 % base)-5 % topical gel				Created, Not Sent Electronically	No		0
🕁 ERA	ERA	isotretinoin 20 mg capsule				Created, Not Sent Electronically	No		0
\delta Refunds	-	Tazorac 0.05 % topical gel				Created, Not Sent Electronically	No		0
		Aczone 5 % topical gel				Created, Not Sent Electronically	No		0
Reports	~	spironolactone 25 mg tablet				Created, Not Sent Electronically	No		0
									•

### 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 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 Licar 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 > Barbara Thompson	Cart				
- 13	Dashboard	Hard of hearing	-				
12	Schedule	Summary Demographics Insurance Profile Financials Encounters Claims Statements Documents To-Do's Recalls Notes and Alerts 🛕 Care	Team				
	Patients	RX History					
	Check Out	🛛 1 selected Q =					
	Cart	Due date: 02/19/2026 No Problem(s) I use of this Object Created by: FZDERM Doctor	MD				
~	To-Do's	Change Recall status >     Change Recall status >     Provider     Schedule appointment >     Change Recall status >     Provider     Provider					
1	Recalls	Override Email Message Recall Status					
		Send email Problem(s) Active					
s	Billing (775)	Email Message 💭 This is a friendly reminder to schedule your annual skin check. Regular screenings are essential for early detection and maintain beathy skin	ng				
	Payments	To secure your preferred time, you can conveniently schedule online at https://ezderm.com/ or call us at 877-443-9337.					
+	⊳ ERA						
ŝ	) Refunds 🔍	Internal Note					
	Reports						
~	Custom Reports	Created on: 02/19/2025 07:41:06 PM					
R	Prescription Peports	s	ave				
	Audit Log						
	Audit Lõg	Comments History					
	Fax Log	Comment					
	Export / Import						

## Sending Individual Recall from EHR

		Barbara Thompson (¥ 44   07/04/1980) +	Close
Ŧ	Recalls	Recall Type 1-year Skin	Check
Q		Due Date 2/19/2	026 >
	Due date: 02/19/2026	Provider EZDERM Doctor,	MD >
Send Email	No Problem(s)	Recall Status Ac	tive >
	i your okin oncok	Problem(s)	>
		Created by EZDERM Doctor, MD on February 19, 2025 at 7:41	: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) +	Close
₹	Recalls	Recall Type 1-year Skin Chr	eck
Q		Due Date 2/19/2026	>
9/2026		Provider EZDERM Doctor, MD	>
) eck	appointment	Recall Status Active	>
		Problem(s)	>
		Created by EZDERM Doctor, MD on February 19, 2025 at 7:41:06	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	

### 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	2-week follow-up	
	Appointment Types	3-month follow-up	
	Recall Types	3-week follow-up	
	Contacts	6-month follow-up	
	Ez Check In Settings	6-week follow-up	
	🔅 Financial Settings 👻		
	Clinics		
	Accounts		
	Dashboard		
	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.

