



**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!



EZDERM

- Demo Practice

Dashboard

Schedule

Patients

Check Out

Cart

To-Do's

Recalls

Billing 776

Payments

ERA

Refunds

Reports

Patients > Barbara Thompson

Cart

Hard of hearing

Summary

Demographics

Insurance Profile

Financials

Encounters

Claims

Statements

Documents

To-Do's

Recalls

Notes and Alerts

Care Team

RX History

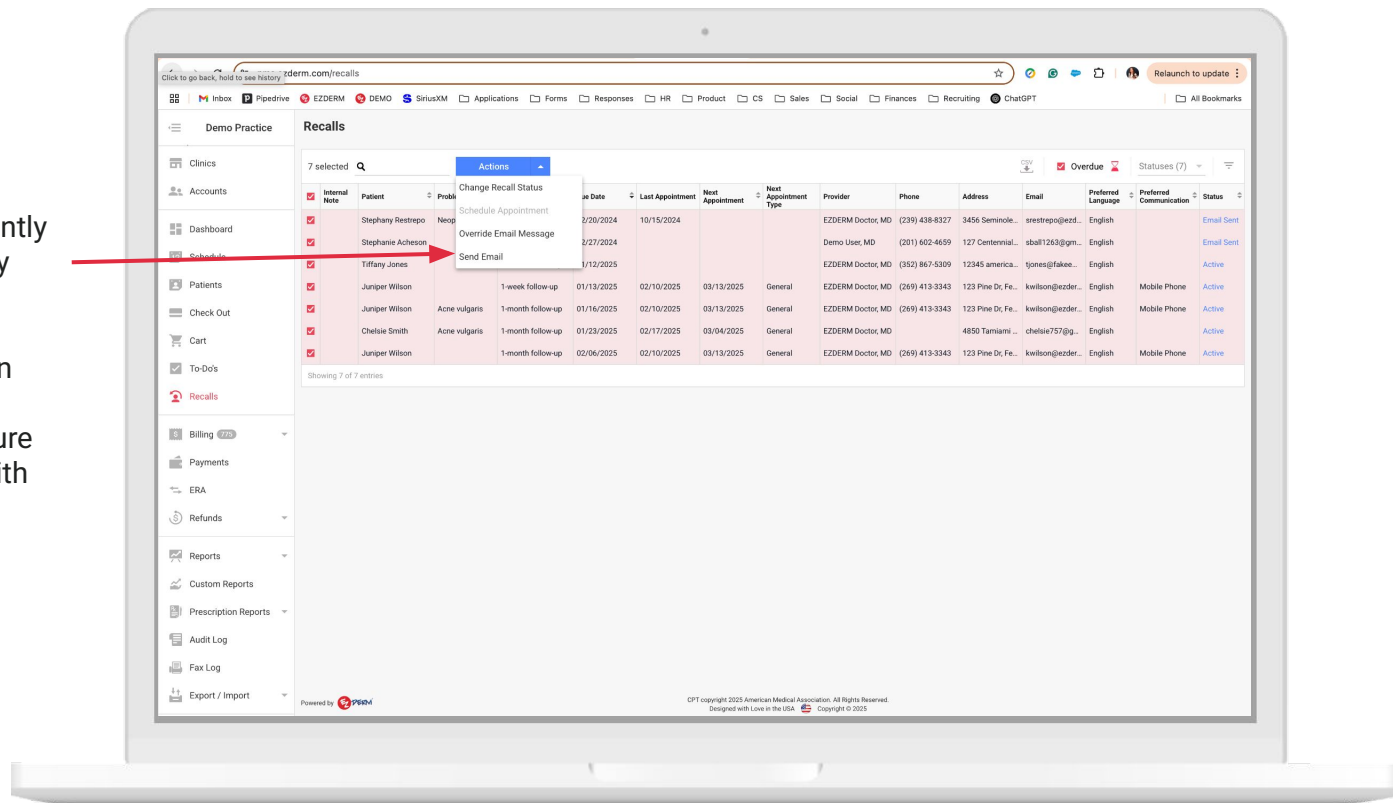
Prescribed

Rx Name	Sent By	Pharmacy	Rx Order Status	Rx Printed	Sent Date	Activity Log
Acne keloidalis						
cyclosporine 100 mg capsule			Created, Not Sent Electronically	No		
minocycline 100 mg capsule			Created, Not Sent Electronically	No		
Acne keloidalis, Acne vulgaris						
doxycycline hyclate 100 mg capsule			Created, Not Sent Electronically	No		
Acne vulgaris						
Duac 1.2 % (1 % base)-5 % topical gel			Created, Not Sent Electronically	No		
isotretinoin 20 mg capsule			Created, Not Sent Electronically	No		
Tazorac 0.05 % topical gel			Created, Not Sent Electronically	No		
Aczone 5 % topical gel			Created, Not Sent Electronically	No		
spironolactone 25 mg tablet			Created, Not Sent Electronically	No		

Sending Batch Recall Emails from the PM


Emails are currently sent manually by your practice.

We're working on automating this process in a future update, along with adding SMS capabilities.



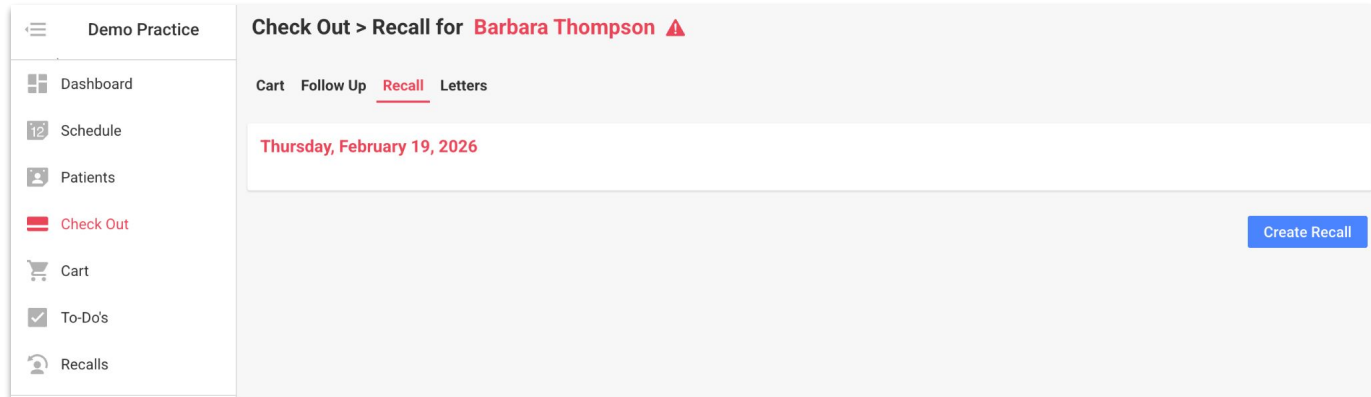
Creating Recalls

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



Sending Individual Recall from PM

Demo Practice

Dashboard

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Patients

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Payments

ERA

Refunds

Reports

Custom Reports

Prescription Reports

Audit Log

Fax Log

Export / Import

Patients > Barbara Thompson

Cart

Hard of hearing

SummaryDemographicsInsurance ProfileFinancialsEncountersClaimsStatementsDocumentsTo-Do'sRecallsNotes and Alerts▲Care Team

RX History

1 selected

Due date: 02/19/2026

No Problem(s)

1-year Skin Check

Change Recall status >

Schedule appointment >

Override Email Message

Send email

Barbara Thompson (BATH0044)

Create Recall

1-year Skin Check

Created by: EZDERM Doctor, MD

Provider

EZDERM Doctor, MD

Due Date

02/19/2026

Problem(s)

Recall Status

Active

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.

Internal Note

Created on: 02/19/2025 07:41:06 PM

Save

CommentsHistory

Comment

EZDERM

Sending Individual Recall from EHR

Barbara Thompson (♀ 44 | 07/04/1980)

+ Close

Recalls

Send Email

Due date: 02/19/2026
No Problem(s)
1-year Skin Check

Recall Type

1-year Skin Check

Due Date

2/19/2026 >

Provider

EZDERM Doctor, MD >

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

Schedule Appt for Recall

Recalls

9/2026

ck

Schedule appointment

Barbara Thompson (♀ 44 | 07/04/1980)

+ Close

Recall Type

1-year Skin Check

Due Date

2/19/2026 >

Provider

EZDERM Doctor, MD >

Recall Status

Active >

Problem(s)

>

Created by EZDERM Doctor, MD on February 19, 2025 at 7:41:06 PM

EMAIL MESSAGE

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We look forward to seeing you soon!

INTERNAL NOTE

>

Comment(s)

History

+ Add Comment

Link Recall to Appointment

The screenshot displays a medical practice management software interface. A modal window titled "New Appointment" is open, showing appointment details for a patient named Barbara Thompson. The appointment is scheduled for 02/20/2025 at 01:30 PM. The "Appointment Type" dropdown is set to "Recall", and a red arrow points to the "1-year Skin Check (02/19/2026)" option. The "Status" is "Scheduled", and the "Referring Physician" is "John Smith, MD". The "Appointment Note" field is empty. The "Billing Note" field is empty. The "Appointment Reminder Note" field contains the text: "A photo ID is required for all patients. Please make sure we accept your insurance".

New Appointment First Available Appointment

Hard of hearing

Patient
Barbara Thompson (F, Jul 04, 1980, BATH0044)

Clinic
LA Derm

Provider
Demo User, MD

Chief Complaint
Other

Appointment Type
General
Recall
1-year Skin Check (02/19/2026)

Status
Scheduled
Not Arrived Yet

Date of Service
02/20/2025

Start Time
01:30 PM

End Time
01:35 PM

Referring Physician
John Smith, MD

Established Patient
☐ New
☒ Established

Appointment Note

Billing Note

Appointment Reminder Note
A photo ID is required for all patients. Please make sure we accept your insurance

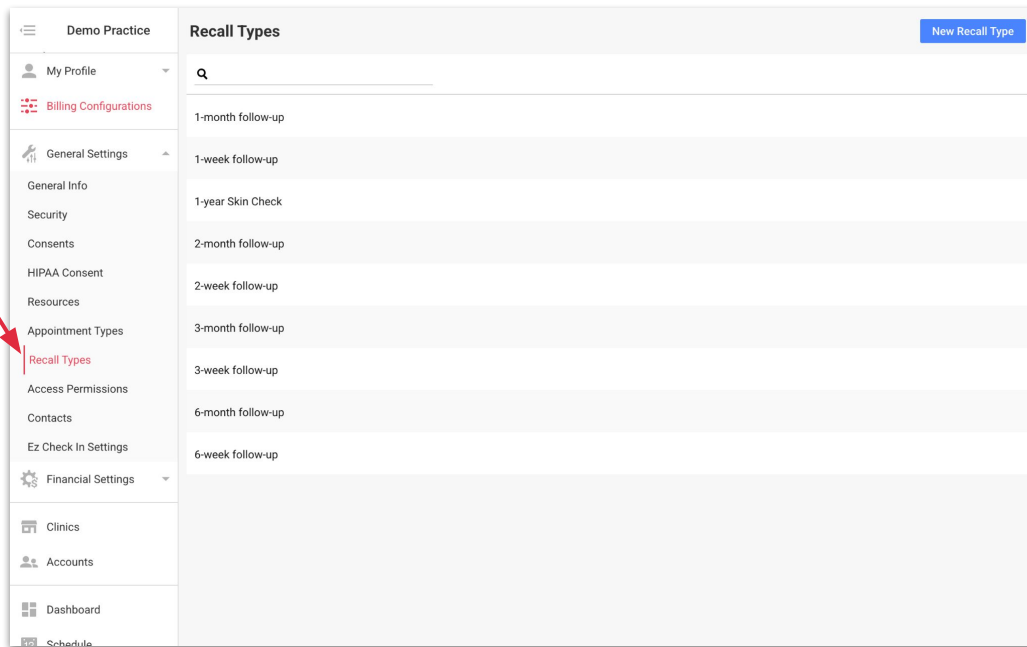
Setting Up Recall Types

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



Increase Your Email Open Rate

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

Action Items:

- ❏ Email techsupport@ezderm.com with your preference for the following 3 items: Practice Name, Short Practice Name, and Sender Name

Example:

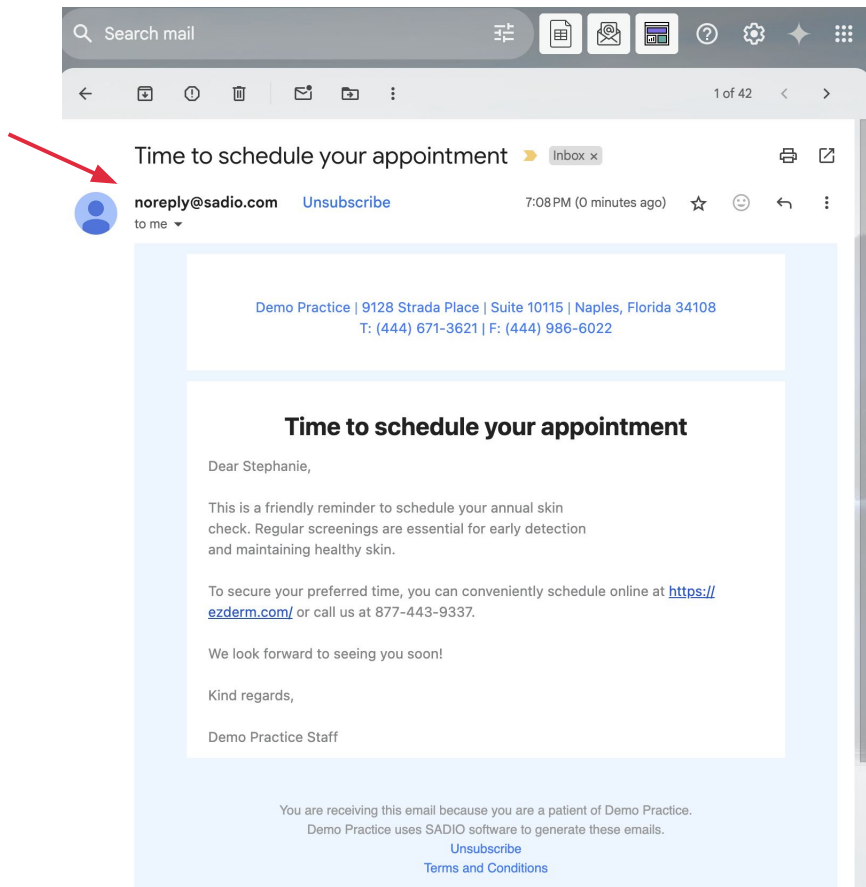
Practice Name: Clear Skin Dermatology and Aesthetic Solutions

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 customersuccess@ezderm.com 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.

