

Recall: Who and When?

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Session Goals

1. How do you know you need to recall patients?
2. Knowing the reports to use
3. Tools that PCC offers to assist



We slow down this time of year



Reports for recalling your patients

Financial Pulse



53

Clinical Pulse



89

Dashboard News

Release 9.4 includes an update to the [COVID-19](#) page to include your COVID-19 vaccination rate trends for various age groups. See how many of your patients are vaccinated at various dose levels (0, 1+, 2+, or 3+ doses) and compare to the PCC benchmark.

Top Priorities

Score Measure

- 0 [Weight Assessment and Counseling - Nutritional Counseling](#)
- 0 [Weight Assessment and Counseling - Physical Activity Counseling](#)
- 18 [Fluoride Varnish Rate](#)

Next Priorities

Score Measure

- 23 [Revenue-per-Visit](#)
- 31 [Coding Expertise](#)
- 35 [RVUs-per-Visit](#)
- 44 [Revenue-per-Visit \(Without Imms\)](#)
- 49 [E&M Coding Distribution](#)
- 56 [Diagnoses-per-Visit](#)
- 63 [Missed Appointment Rate](#)
- 65 [Developmental Screening Rate - Infants](#)
- 69 [Sick-to-Well Visit Ratio](#)
- 77 [Well Visit Rates - Patients 12-21 Years](#)
- 79 [A/R 60-90 Days Old](#)
- 85 [Depression Screening Rate - Adolescents](#)
- 86 [Pricing](#)
- 89 [A/R Days](#)
- 89 [A/R Over 60 Days Old](#)
- 94 [Immunization Rates - Influenza \(Asthma\)](#)
- 94 [Well Visit Rates - Patients 15-36 Months](#)
- 97 [Immunization Rates - Meningococcal](#)
- 97 [Immunization Rates - Tdap](#)



Reports for recalling your patients

Content

Reports	Scheduled Reports	Saved Results
Reports		
▶ Patient Portal		
▼ Patient Recall		
Name ▲		
Broadcast Messaging Patient List ✦		
Broadcast Messaging Patient List - CUSTOM		
Chronic Condition Recall ✦		
Chronic Condition Recall - CUSTOM		
Overdue Vaccine Recall ✦		
Overdue Vaccine Recall - CUSTOM		
Overdue Vaccine Recall - custom from a custom recall - 2 yr old		
Overdue Vaccine Recall - custom from a custom recall - 4 yr old		
Overdue Vaccine Recall - custom recall		
Patient Immunization Administration Summary ✦		
Patient List ✦		
Patient List - CUSTOM		
Patients Overdue for Weight Management ✦		
Preventive Care Recall ✦		
Preventive Care Recall - CUSTOM		
Preventive Care Recall - custom last 90 days		
Well Visit Recall		
▶ Prescription		

Next Priorities

Score	Measure
23	Revenue-per-Visit
31	Coding Expertise
35	RVUs-per-Visit
44	Revenue-per-Visit (Without Imms)
49	E&M Coding Distribution
56	Diagnoses-per-Visit
63	Missed Appointment Rate
65	Developmental Screening Rate - Infants
69	Sick-to-Well Visit Ratio
77	Well Visit Rates - Patients 12-21 Years
79	A/R 60-90 Days Old
85	Depression Screening Rate - Adolescents
86	Pricing
89	A/R Days
89	A/R Over 60 Days Old
94	Immunization Rates - Influenza (Asthma)
94	Well Visit Rates - Patients 15-36 Months
97	Immunization Rates - Meningococcal



Tools you have to accomplish this

Practice Vitals Dashboard

Sample Practice
Winooski, VT

Patients Overdue For a Well Visit (Under 15 Months old)

Why are these 5 patients overdue?

Data is up-to-date as of 6/4/2022

- They have been seen by someone in your practice at **least once before they were six weeks old**
- AND
- They are **not flagged** with any inactive flags
- AND
- They had fewer than six well visits before they turned 15 months of age

Save as Spreadsheet File Spreadsheet file is in .csv format and includes patient address.

First Name	Last Name	Date of Birth	Patient PCC #	Primary Care Provider	Patient Flags	Date of Last Well Visit	Date of Last Visit	Date of Next Scheduled Visit	Reason for Next Scheduled Visit	Phone Number	Email Address
First	Last	03/19/20	13250	Provider 13		03/22/22	03/22/22	10/11/22	2.5Year PE		
First	Last	05/09/20	13273	Provider 13		07/06/20	07/06/20				
First	Last	10/02/20	13825	Provider 13		04/09/21	03/02/22				
First	Last	12/27/20	13913	Provider		07/06/21	07/06/21				
First	Last	12/15/20	13921	Provider 13		02/19/21	02/19/21				

Export

Save as PDF
 Save as CSV
 Send Message to Patients via Text (SMS), Email

Text (SMS) messages are sent to mobile phone, work phone, cell phone, emergency and portal user phone.
 Text (SMS)

Email messages are sent to email address.
 Email

Subject:

1/160



Session Takeaways

1. How to keep staff busy during slow times
2. PCC Reports to set goal(s)
3. PCC Tools to achieve goal(s)



References

Your Practices Dashboard

Jim's brain

Reports Library



What Questions Do You Have?

Questions posted in the Socio will be read aloud by moderator for the presenter to answer. Please post your questions in Socio now.



Later Viewing

This and all other UC2022 course recordings will be available for later viewing through Socio and [PCC's YouTube Channel](#)

