

## Will-Call-Back Control

### EXAM: Will Call Back control

- ☐ If the patient/family is reluctant to schedule the records appointment, they are placed on Will Call Back (WCB) status. 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,
 

"When would be the best day and time of the day in the next week or so to call you?"
- ☐ The TC notes the date and time to call them on the Dictated Exam Form in the Exam Notes section. The patient's name, phone number and that date and time are also noted on the Phone Follow-up Call Log. The folder is filed in the Will Call Back File section of the *Communications File*.
- ☐ The **Phone Follow-up Call Log** is actually a tickler calendar. The top page contains all the patients to be called *this* week. The next page contains all of the patients to be called *next* week; the third page is the week after that, etc. If you want to call somebody in two weeks, flip down two pages and list their name, phone number and the reason for the call; call them in two weeks. If you can't get in touch with them by the end of the week, send them the appropriate follow-up letter as noted below.

Phone Call Follow-up Log		Week to Call From _____ to _____		
NAME	Phone	Reason for Call	Dates Called	OK

- ☐ If the patient/family would rather not be called, the TC notes it in the Exam Notes section. The patient's folder is placed in the WCB file with a note on it to contact them in six months should they not make a decision by then. They are placed into the OBS Recall system for six months: see 6-mo recall letter below.
- ☐ If the patient/family Will Call Back about records, but the TC cannot get in touch with them after two weeks, 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

## Treatment Will Call Back Follow-up

- ☐ If the patient/family will call back about treatment the TC notes the day and date on the Phone Follow-up Call Log in the week the patient/family said was the best time to call them back. If the TC cannot reach the patient after a few calls, she requests a Tx Consult WCB Follow-up letter.

<b>Tx Consult, Will-Call-Back Follow-up</b>	
Dear X:	Re: Patient's Full Name
<p>Thank you for your participation in (Pt's. 1st name)'s orthodontic examination, diagnostic records, and Tx Consultation, all of which helped us to diagnose and plan (his/her) orthodontic treatment needs.</p> <p>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.</p> <p>Sincerely:</p> <p>(TC's Name) for Dr. Braceman</p>	

- ☐ If the patient doesn't decide after sufficient effort, he/she is placed on the Recall List to be called in six months.
- ☐ All patient folders in the Will-Call-Back file that are on the Recall list are *called* six months after his/her Tx Consult. If the TC cannot reach the patient after a few calls, she requests a 6-Month WCB Follow-up.

<b>6-Month, Will-Call-Back</b>	
Dear X:	Re: Patient's Full Name
<p>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.</p> <p>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.</p> <p>Please call me at your convenience; thank you.</p> <p>Sincerely:</p> <p>(TC's Name) for Dr. Braceman</p>	