

## ***REVISED* OBS RECALL Control**

*Observation Recall* refers to patients who are too young to start active orthodontic treatment because they need more permanent teeth. *OBS Recall Control* refers to making sure that at least 65% of the patients placed on OBS Recall are started in active treatment. This is accomplished in a four-step program.

- \* Accounting for patients already placed on OBS Recall who *might have been lost*.
- \* Managing OBS Recall visits and encouraging patients to *invest* in their future Tx.
- \* ***Take Control of Patients on OBS Recall.***

When your **OBS Conversion Ratio** on your **Super Report** is about 45%, you are average; when over 65% you are doing well; and, when over 75% you are exceptional.

### **\* ACCOUNTING FOR OBS Recall Patients:**

1. Use an "OBS" (or OB) appt. code for OBS Recall patients and an OB1 (or O1) code for Ph-I Recall patients.
2. **After the exam, place the patient on OBS and enter the following data to that OBS file, if possible:**
  - a. Exam Date
  - b. Age
  - c. Possible Start Month/Year
3. If available, use a computer printout of all OBS Recall patients and check to see when they were last seen.
  - a. First, schedule an appointment ASAP for all OBS Recall patients not seen in 12 months.
  - b. Second, schedule an appointment for all OBS Recall patients not seen in 6 months.
  - c. Schedule a Tx Consult for all patients who are ready to start treatment and get them started.

### **\* Managing Recall Visits and Encouraging OBS Recall Patients to Start with YOU!**

1. Use a Pre-Orthodontic Guidance (**POG**) program to make the patient feel as if they are already in treatment. *All* of your OBS Recall patients are automatically in the program (whether they pay for it or not).
  - a. Take a Panograph and Digital Photos after the exam and take more if needed during the program. If they are not in the POG program, charge them for the records and emphasize the financial advantages of the program.
  - b. Charge a POG program fee: typically \$115 for a 1- to 2-year program or \$135 for a 2+-year program. Set up a POG Charge Code on your computer to account for them being in the program.
  - c. Reduce their *INITIAL PAYMENT* (*not* their records fee) by the POG fee amount when they start active treatment. They won't waste their investment if they know they will get it back when they start (but they could start elsewhere with your records if you reduce their records fee by the POG fee).
2. Schedule OBS Recall appointments in the **TC column** on your scheduling system.
  - a. This allows the TC to have full control over all patients who have not yet started.
  - b. Schedule OBS Recall appointments at 6-month intervals (9-12-month intervals if 8 or younger).
  - c. At each OBS Recall visit give the patient something to look for in their tooth development to report on to you at the next visit. If desired, have them come in when the event has occurred, but don't go more than 6 months between appointments if they are over 8 or else they might lose motivation to start.
  - d. Give the patient a possible start date at every appointment and make them aware of the teeth that need to erupt to start.
3. Establish a TC program that allows the patient/family to **pay towards their initial payment** in monthly installments during Recall OBS (whether in they are in the POG program or not). This is a common practice that many

patient/families appreciate and desire, but you must present it to them in such a way as to make those who do not ask to also be aware of it. There is a two-step program for pre-payment:

- a. **Step-1:** Once you place them on the POG program and give them the Pre-Orthodontic Guidance program card, make the following suggestion:

**“Many of our patients ask us if they could make monthly payments towards their initial payment for treatment, significantly reducing or eliminating their initial payment when they start.”**

—pause for a second—

**“Our initial payments average about \$1,200, so a two-year Pre-Orthodontic Guidance program would eliminate the initial payment if you paid \$50 per month. Is that something that you might be interested in?”**

—pause for a second—

If they say YES, set up the payment plan using a “Pre-Payment, Payment Card”

If they say NO and mean it, just consider them as on the POG program (whether they pay for it or not) and check them out.

If they say seem interested, but don't accept it yet you might go to step two.

- b. **Step-2:** This is to encourage those interested in pre-payment, but who have not actually accepted it yet; make the following suggestion:

**“One of the concerns about future treatment is the increase in fees due to inflation. We can freeze your treatment fee and initial payments at their current level if you are willing to pay towards your initial payment during your Pre-Orthodontic Guidance program”**

—pause for a second—

**“Is that something that you might be interested in?”**

—pause for a second—

If they say YES, set up the entire contract and payment plan and give them a “Pre-Payment, Payment Card” to use during the POG program.

If they say NO, just consider them as in the POG program (whether they pay for it or not) and check them out.

✱ **Please Note: Most of the above can also be used for Ph-II patients finishing Ph-I Tx and going on Ph-I Recall.**

✱ **Take Control of *OLD* Patients on OBS Recall:**

1. Print a computer list of all patients on OBS recall.
  - a. Highlight every patient who has been on OBS for more than two years.
  - b. Review their Tx Charts and determine whether they seem ready to start.
  - c. Enter a note on the Tx chart to possibly get them started on their next appointment.
2. If it has been more than one year since their last appointment (as determined from the Tx Chart):
  - a. List (see form below) every patient and the pertinent information.
  - b. Highlight those who are above the age you usually start them (males and females).
  - c. Have the TC call the patient/family and schedule them for an appointment.
  - d. At the appointment, set a start date and have the TC follow-up on it to make sure they are started.

**\* Take Control of *NEW* Patients on OBS Recall:**

1. Each month, print a list of all OBS patients that have an appointment that month; the list should include:
  - a. The patient's exam date
  - b. The patient's age when first examined
  - c. The possible start month/year
2. Highlight all patients who have a possible start date that month and note it on their Tx Chart.
3. At the visit, closely evaluate the start date (now, 1-mo, 3-mo, etc.) and make the appropriate appointments

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