How to handle Recalls in TDO

712 TDO KB September 16, 2025 Reporting Tools, TDO software 10.67K

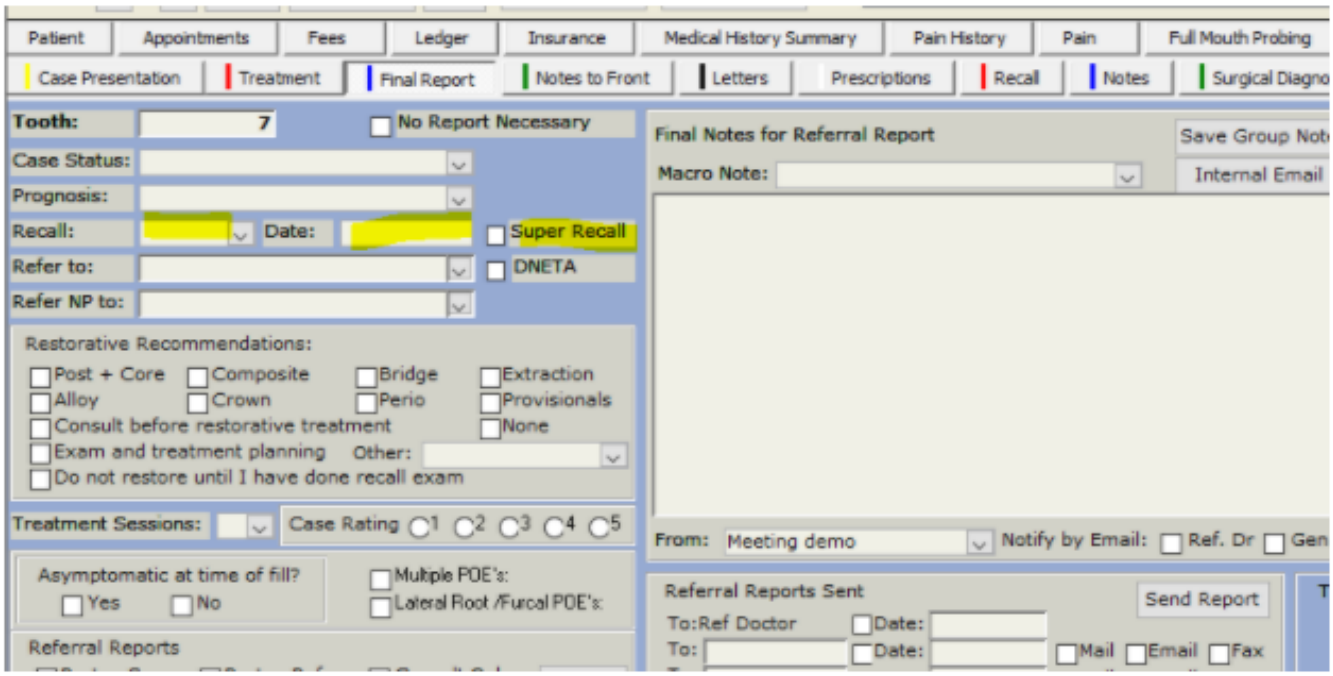
Overview

This article will show you how to mark patients as recall or super recall patients and the two different ways to send recall cards.

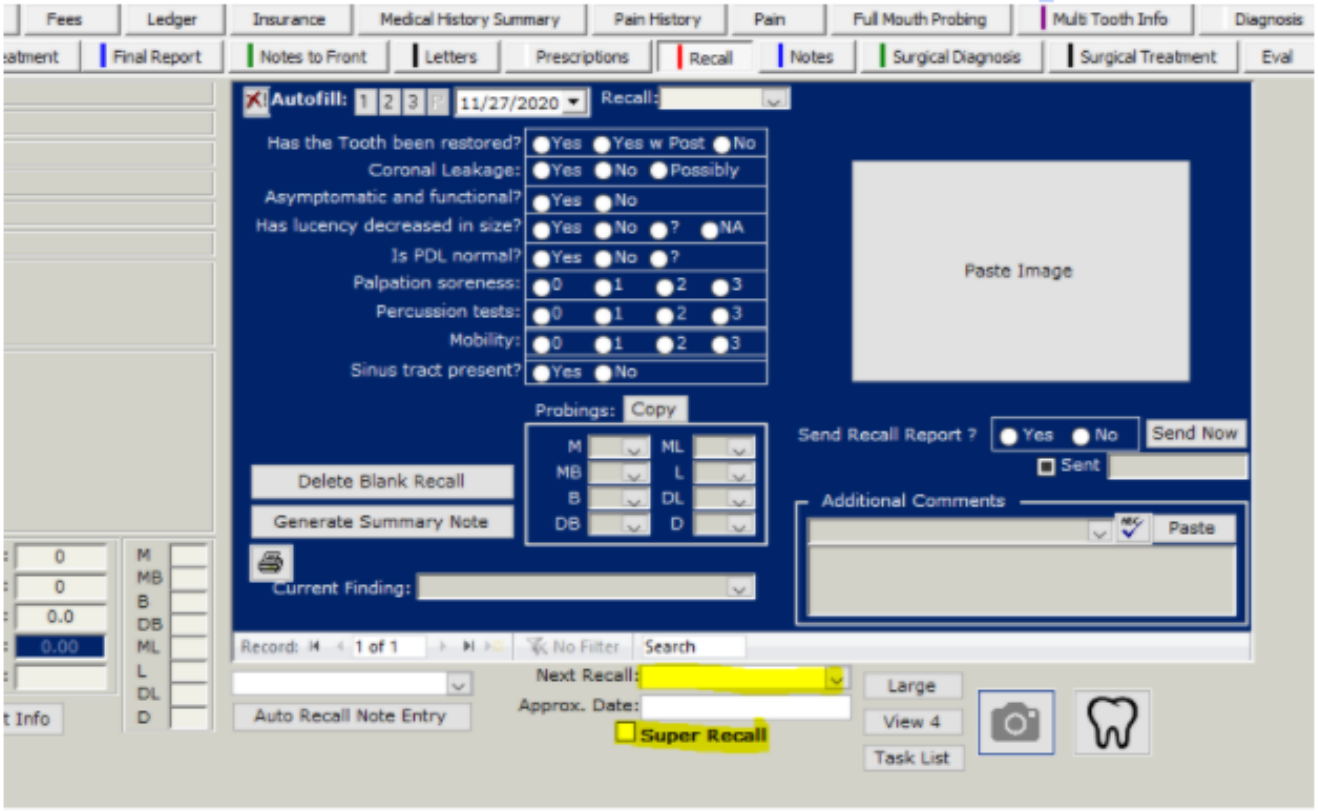
How To Add A Recall Patient in TDO

There are two places you can mark a patient as a recall patient: the 'Final Report' tab or the 'Recall' tab, either of these will populate to the same place. On the Final Report tab, there is a drop-down menu on the left-hand side. You choose how long until you want to see the patient again (ex 1 month or 1 year), and it will automatically calculate the estimated recall date in the next box.

Note: Select the Super Recall checkbox in cases where it is essential that the patient return to the office for a follow-up appointment.



The Recall tab has the same dropdown, but it is near the bottom right of the tab.



Viewing recall patients

Once you mark the patient as needing a recall report sent, they show up under **Reporting Tools > Daily Reports > Recall Reports** to be Completed.

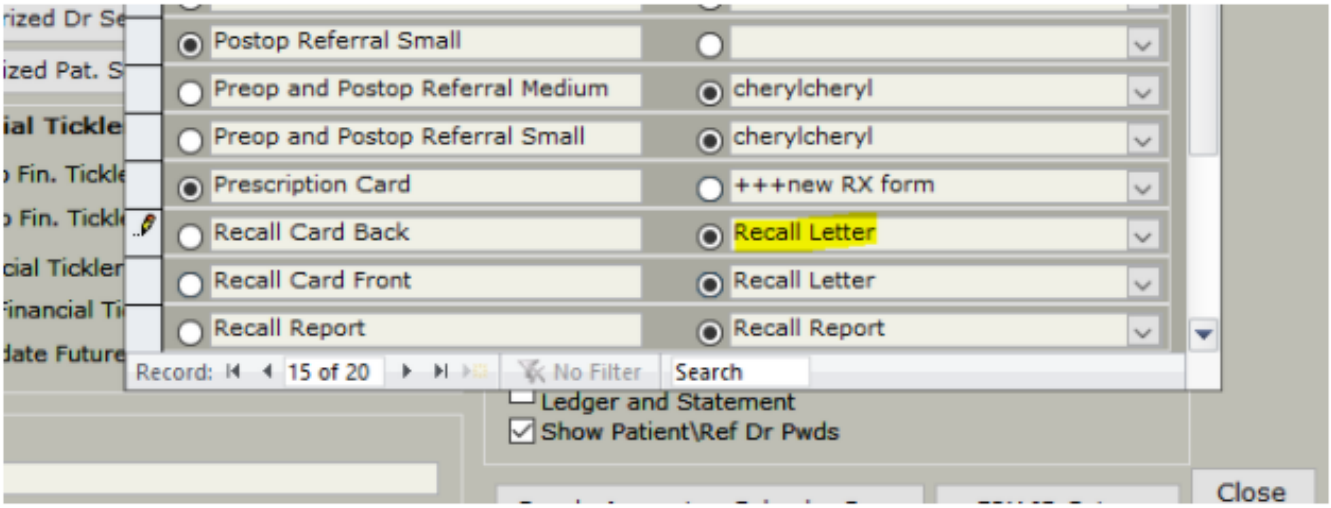
To view the patients due for a recall appointments for a certain time frame, go to **Reporting Tools > Administrative > Recall Appointments > Recall Appointments**

To view the patients marked as super recall, go to **Reporting Tools > Administrative > Recall Appointments > Super Recalls,** and you can choose more or less than 30 days.

Creating Recall Cards

Recall Reports Using the Letters Module (Preferred Method):

Edit your Recall Letter in the letters module to your liking. Once that is complete, go into **Setup > Site Configuration > Edit Control Table > Application Settings** and click the button that says **Reports…** and change **Recall Card Back** to your recall report.



Editing the existing recall template:

If you prefer to print 4x4 cards to mail to patients, you can create a custom message by going to **Setup > Program Setup > Recall > Message Options**.

Sending Recall Cards

Here is a step-by-step guide for printing recall cards:

1. Go to **Reporting Tools > Administrative > Recall Appointments > Recall Card Back**. (If you chose to print recall cards, you can print them from here. Once printed, flip the paper and repeat the process using **Reporting Tools > Administrative > Recall Appointments > Recall Card Front** if you chose the letters module, continue onto the next steps.

2. Select the dates for the recall cards.

3. The letters will begin batching in the letters module

4. When the batching is complete, go to **Reporting Tools > Daily Reports > Letters to Send** and send the letters from there.

Using the Recall Tab

If you need information on how to use the recall tab, watch this video

Online URL: https://kb.tdo4endo.com/article.php?id=712