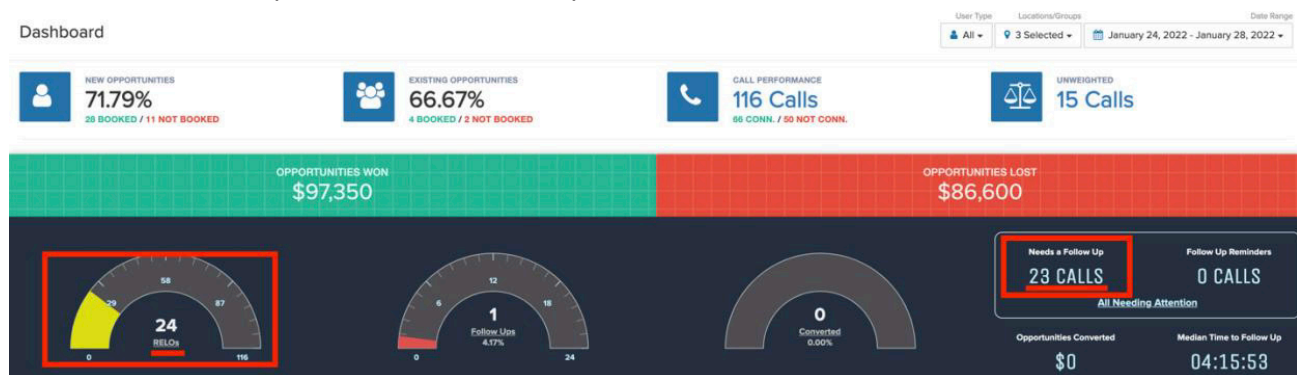


Following up on a RELO alert

(RELO = Re-Engage Lost Opportunity)

1. Patient Prism will send a RELO when a new patient does not book an appointment.
2. The alert will be sent to the specified user(s) email address(es).

Note: You can always access RELOs easily from the Dashboard. *(shown below)*



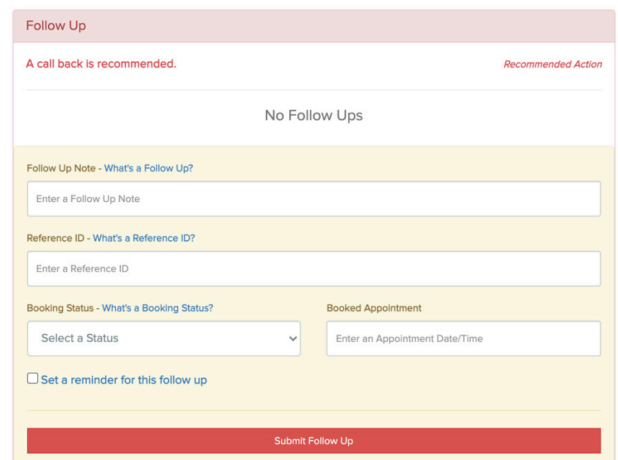
3. The person assigned to make follow up calls with patients should access the RELO'd call.
4. Once the call record is open, thoroughly read the notes we provided. For further information and training, watch the attached videos. *To increase success - immediate call back is recommended.*
5. Call the patient back and attempt to book the appointment.
6. Enter a note in the **"Follow Up Notes"** section of what occurred on the call.
7. Use the **"Booking Status"** drop-down list to indicate whether the patient booked an appointment or not.

The box will change color depending on what is selected:

- Green: An appointment was booked
- Red: An appointment was not booked
- Yellow: A booking status was not selected

Note: The Booking Status field is crucial for accurate reporting. You will want to always make sure you are selecting "booked" if the follow up was successful.

8. Select **"Submit Follow Up"**.



The 'Follow Up' form includes the following fields and options:

- Message:** A call back is recommended. (Recommended Action)
- Status:** No Follow Ups
- Follow Up Note - What's a Follow Up?:** Enter a Follow Up Note
- Reference ID - What's a Reference ID?:** Enter a Reference ID
- Booking Status - What's a Booking Status?:** Select a Status (dropdown menu)
- Booked Appointment:** Enter an Appointment Date/Time
- Set a reminder for this follow up
- Submit Follow Up** (button)

Turn missed opportunities into new patient revenue through our Re-Engage Opportunity alerts.

Visit [Support.PatientPrism.com](https://support.patientprism.com) to schedule training with your account manager.