Patient Recall Pipeline — User Guide

The Patient Recall Pipeline automatically follows up patients who are due for their next eye examination, so nobody is forgotten and nobody is chased twice. Instead of working off manual lists, patients flow through **three escalating pipelines**, and anyone who comes in for an exam is closed off automatically.

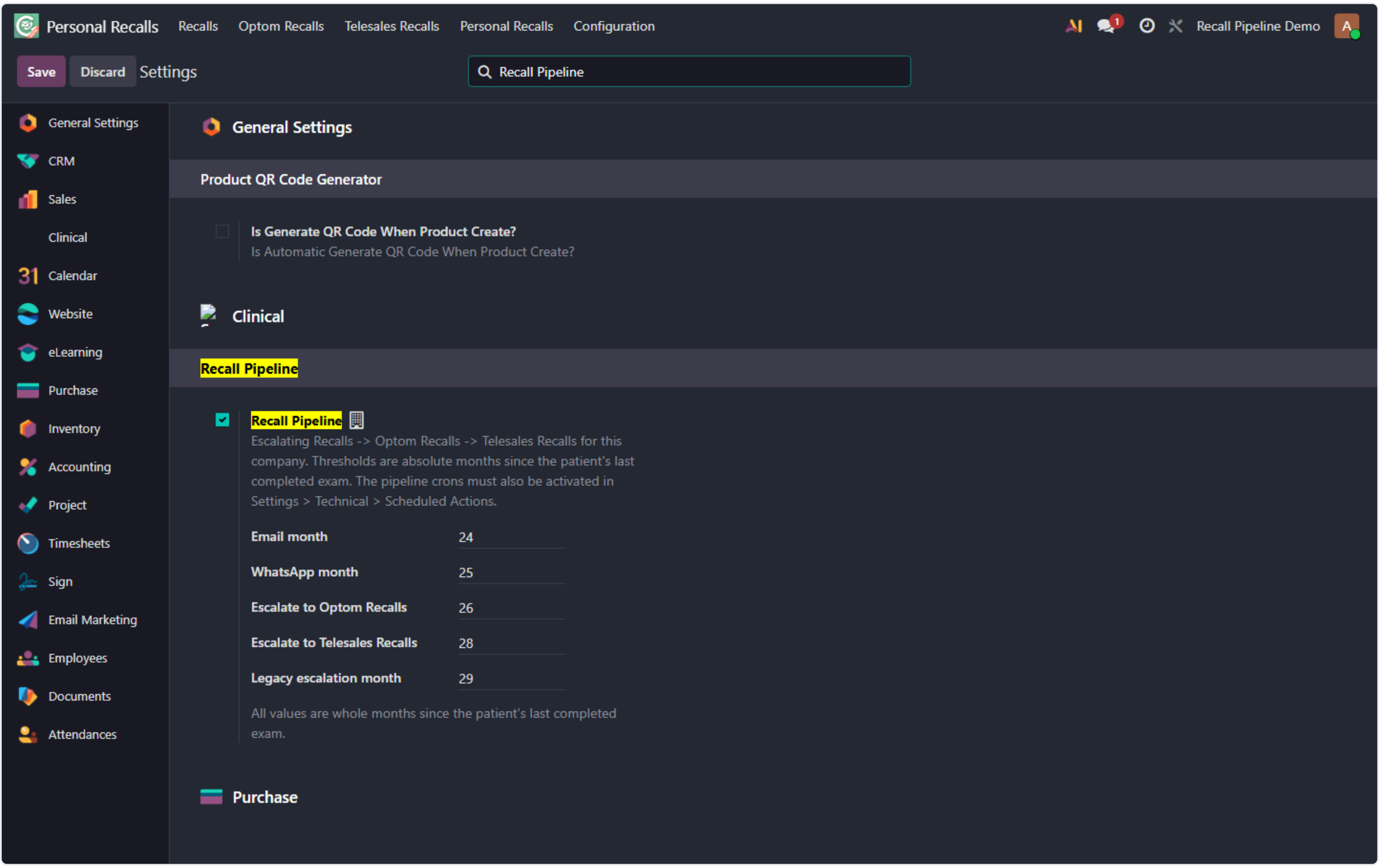
Pipeline	Menu	What it's for	Who works it
1	**Recalls**	First contact — the automated email / WhatsApp reminder	Front desk
2	**Optom Recalls**	Optometrist-led follow-up for patients who didn't respond	Optometrist
3	**Telesales Recalls**	A phone-call queue for those still outstanding	Recall caller

All three appear under the **Personal Recalls** menu at the top of the screen.

Every pipeline ends in a **Won** stage — *the patient came in, no further action is required*. When a record reaches Won (or is otherwise finished), it drops off the active board automatically, so the boards only ever show live work.

1. Turning it on

Go to **Settings** → **Clinical** → **Recall Pipeline** (type "Recall Pipeline" in the settings search to jump straight to it).



- Tick **Recall Pipeline** to enable it for the current company. **Each branch/company is controlled separately** — switch company first if you run more than one.
- The values below are the **number of months since the patient's last completed exam** at which each step happens:
  - **Email month (24)** — a Recall is opened, the email reminder goes out, and the Recall is marked *Contacted*.
  - **WhatsApp month (25)** — the WhatsApp reminder is sent and the Recall is marked *WhatsApp Sent*.
  - **Escalate to Optom Recalls (26)** — if the patient still hasn't returned, they move to the optometrist follow-up.
  - **Escalate to Telesales Recalls (28)** — contacted Optom Recalls that still haven't returned move to the call queue.
  - **Legacy escalation month (29)** — the final fall-back threshold.

  Adjust these numbers to match how your practice likes to recall patients.

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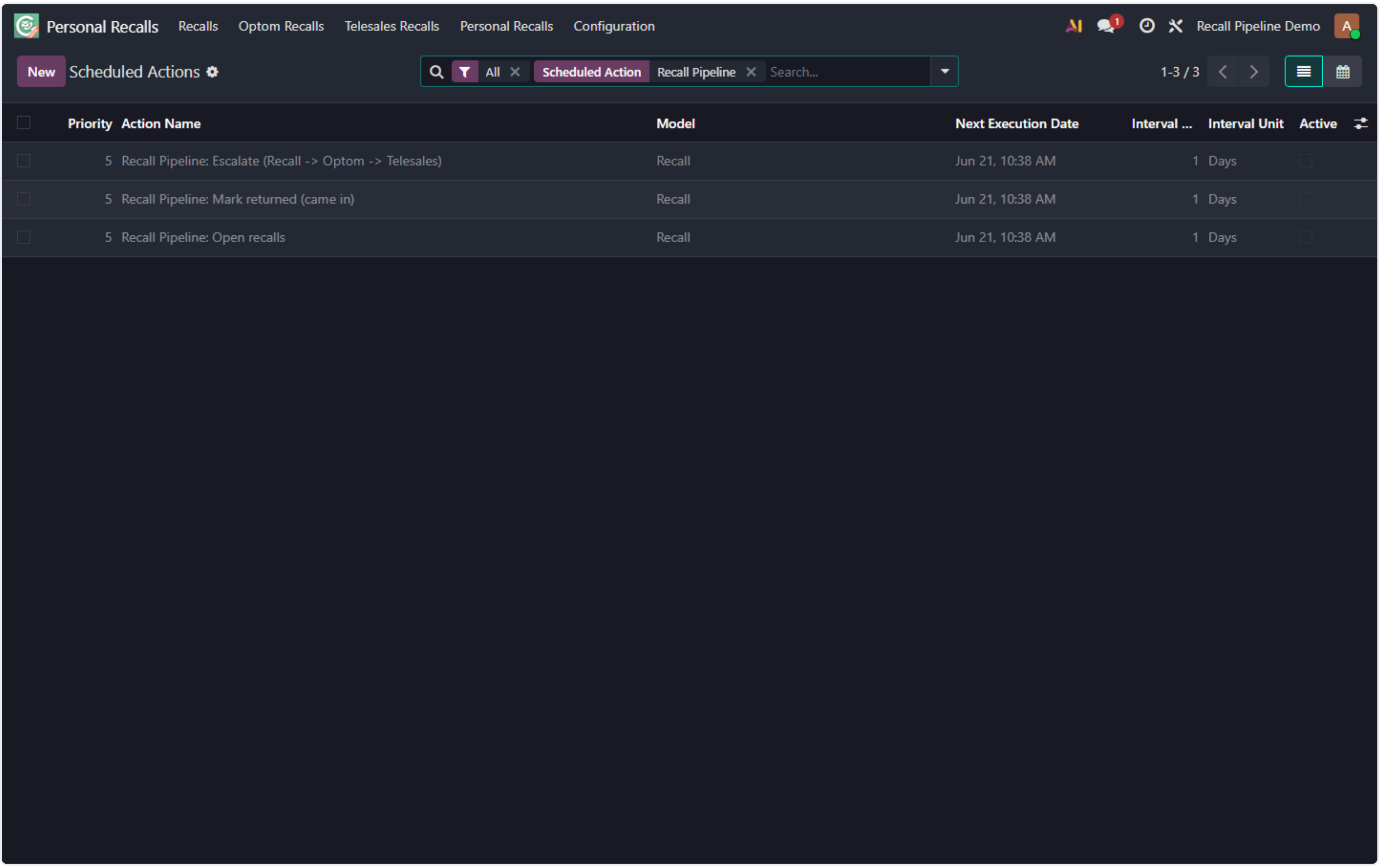
2. Activating the daily schedule

The pipeline is driven by three daily background tasks. They are delivered **switched off**, so nothing happens until you're ready. Turn them on under **Settings** → **Technical** → **Scheduled Actions** (search "Recall Pipeline"):

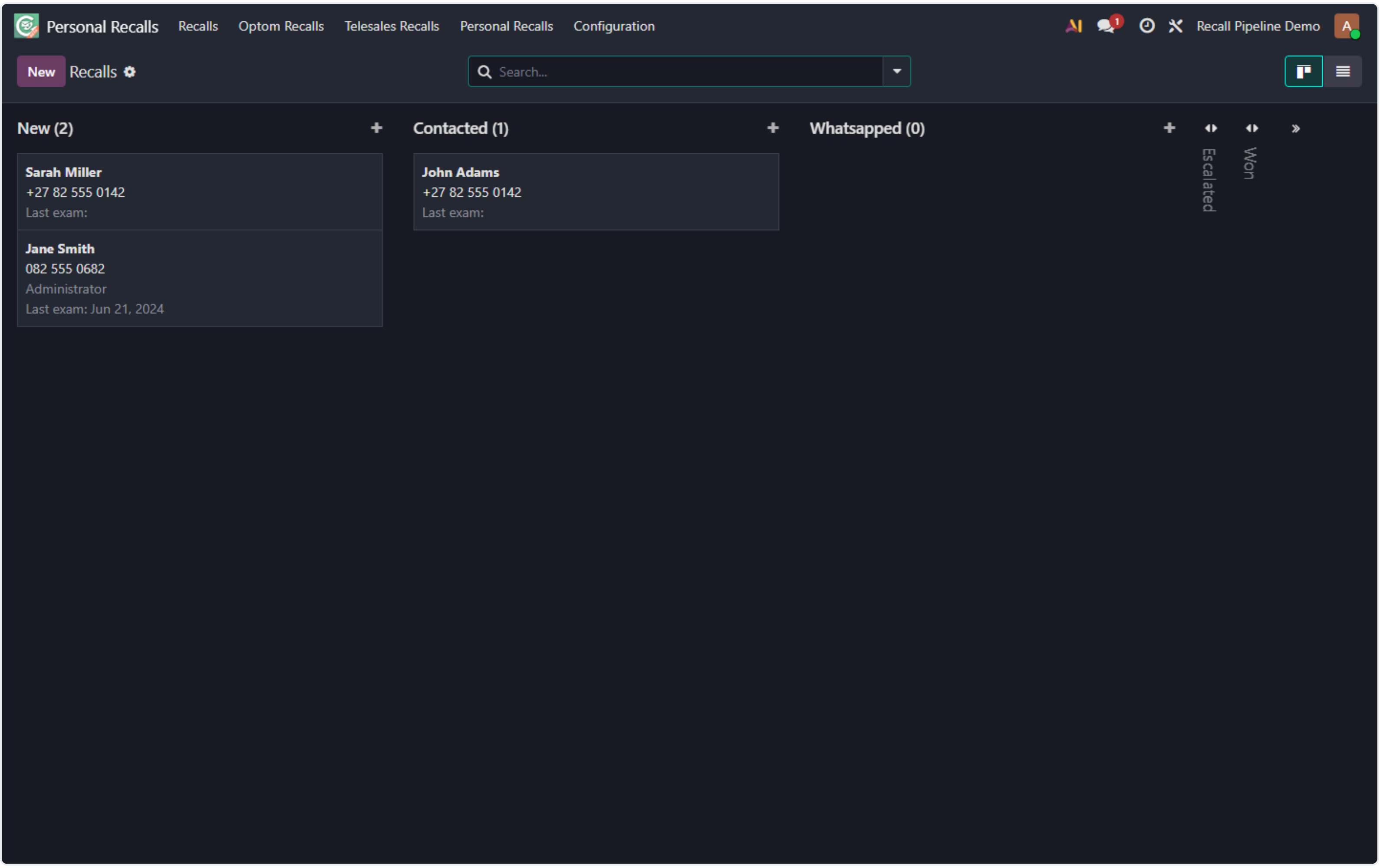


Scheduled action	What it does each day
Open recalls	Opens a new Recall for every patient who has reached the Email month
Mark returned (came in)	Closes any recall whose patient has since come in for an exam
Escalate	Moves patients down the pipeline (Recalls → Optom → Telesales) as they pass each threshold

Tick the **Active** box on each to start. They only ever act on companies where the pipeline is enabled, and they never touch your existing recall, SMS or contact-lens reminders.

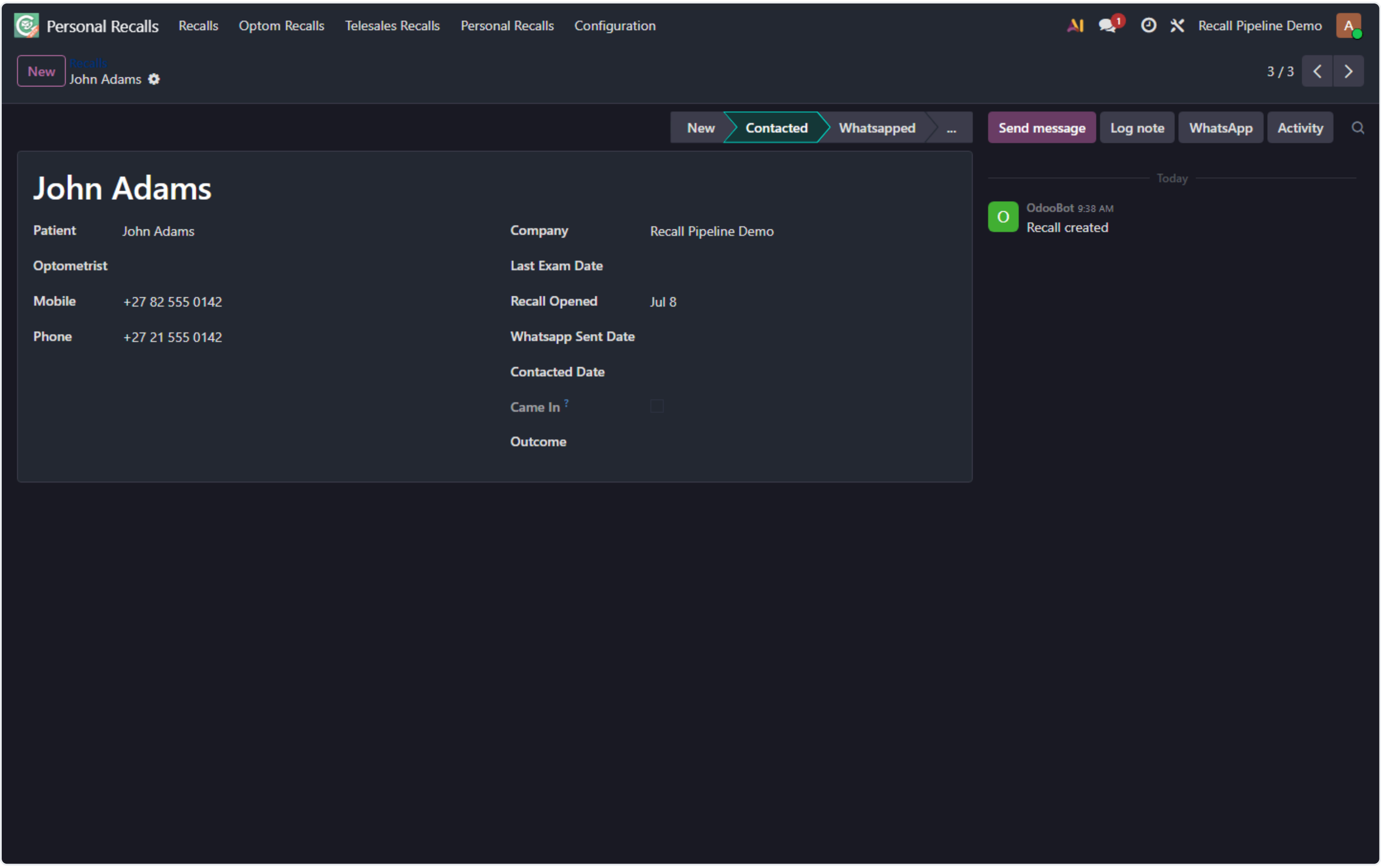
3. Stage 1 — Recalls (front desk)

The **Recalls** board shows patients at first-contact stage, grouped by progress:



- **New** — a reminder is due, or has just gone out.
- **Contacted** — the email reminder has been sent.
- **WhatsApp Sent** — the WhatsApp reminder has also gone out, one month later.
- **Escalated** — the patient didn't respond in time and has been handed to **Optom Recalls** (this column is folded away; the record archives off the board).
- **Won** — the patient came back in (folded; archives off the board).

Click any card to open the full record:



Here you can see the patient's contact details, their optometrist, the last exam date, when the recall was opened, and whether the reminders have gone out. **Came In** ticks automatically once the patient has a completed exam dated after the recall was opened — at which point the recall moves to **Won**. A **Mark Contacted** button is available on brand-new records for logging a manual follow-up.

What the front desk does here: work the **New** and **Contacted** columns. If a patient phones back or books, that's handled by their exam — the system closes the recall for you. There's nothing to do in the Escalated or Won columns; those are handled automatically.

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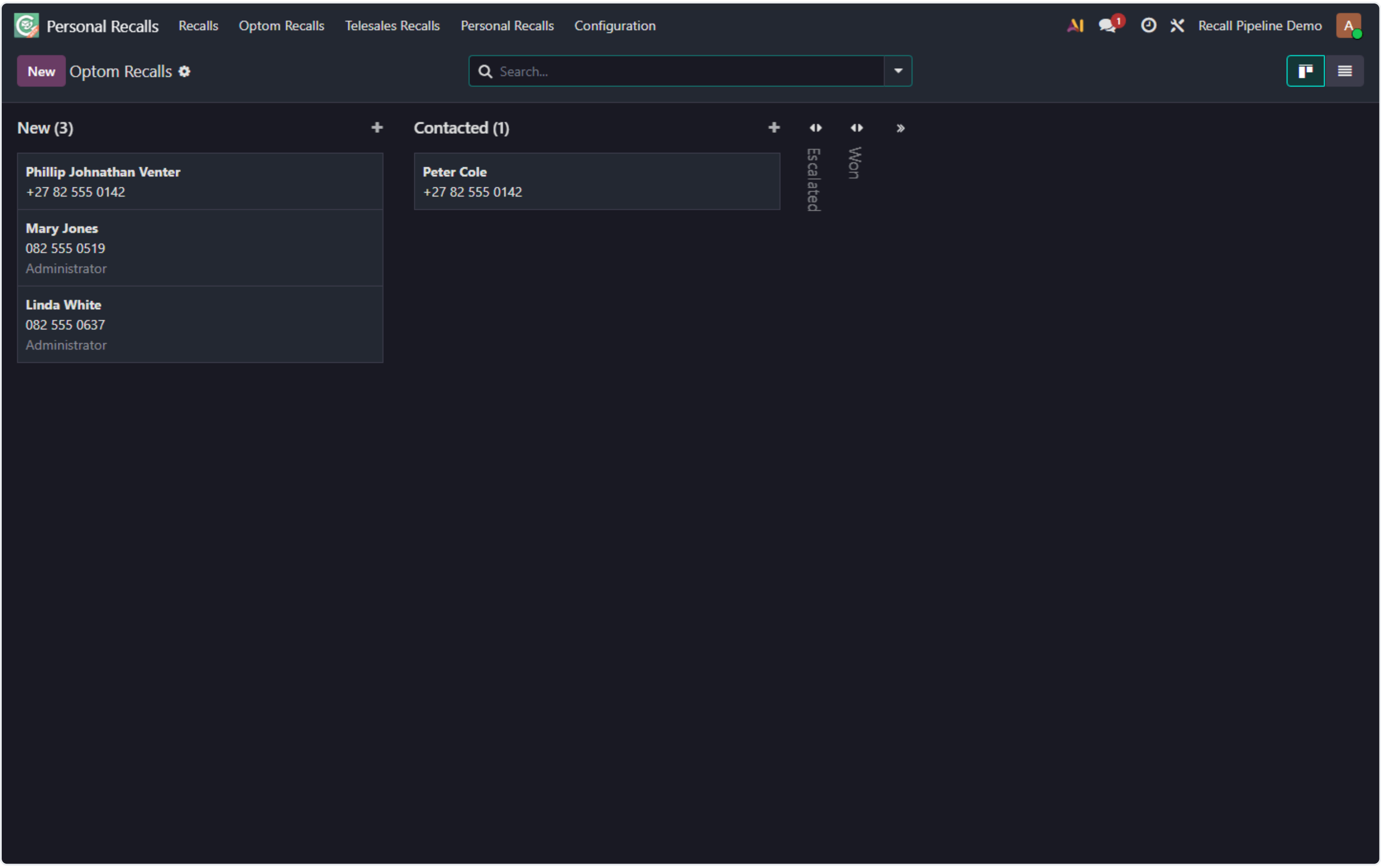
4. Stage 2 — Optom Recalls (optometrist)

Patients who don't return in time escalate here for an optometrist-led follow-up. The stages are **New** → **Contacted** → **Won**.



Each Optom Recall remembers the original Recall it came from — open the record and use **Source Recall** to see the full history. Move a patient to **Contacted** once you've reached out. If they still don't return, they escalate again to the Telesales call queue; if they come in, the record moves to **Won** and archives.

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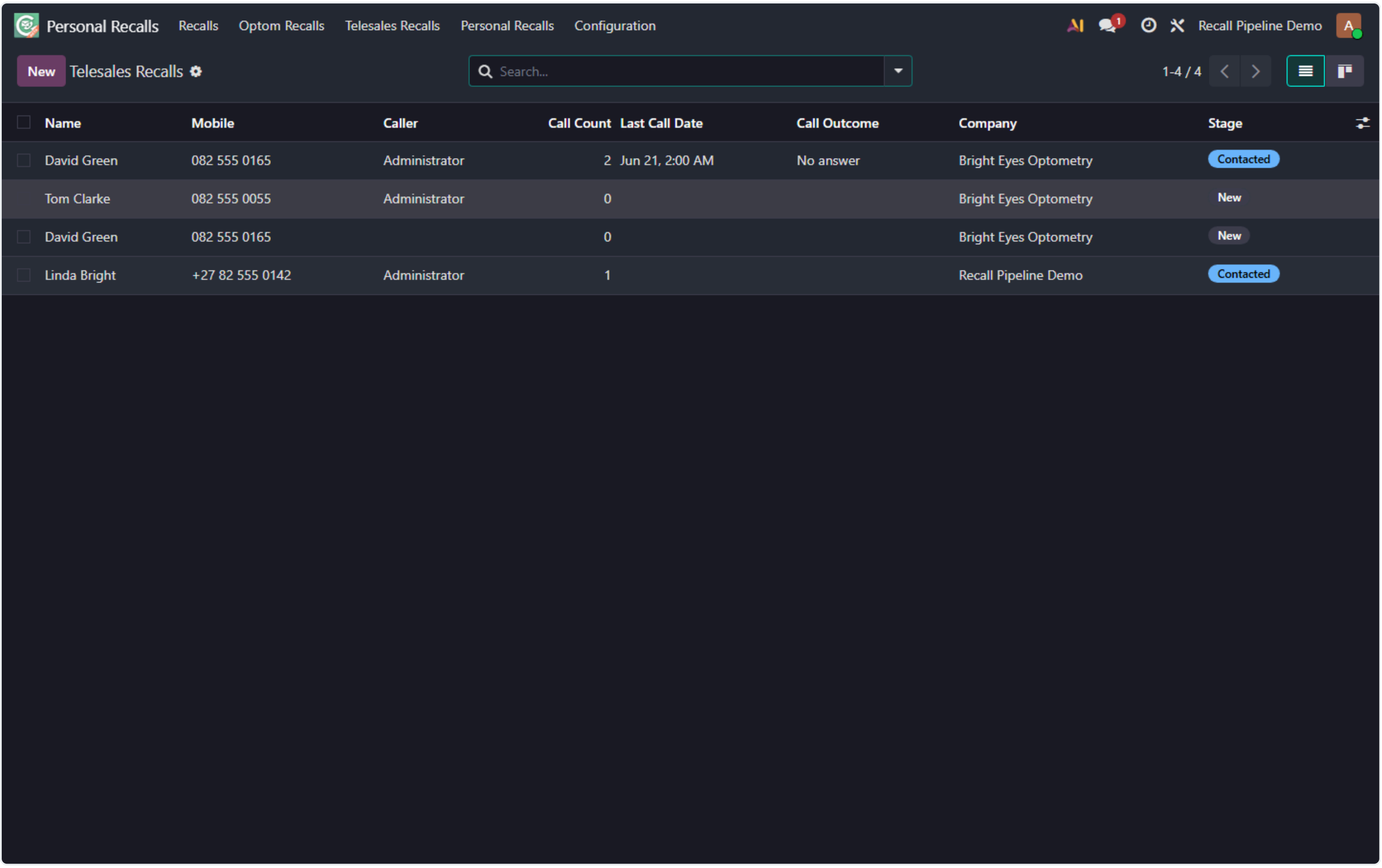
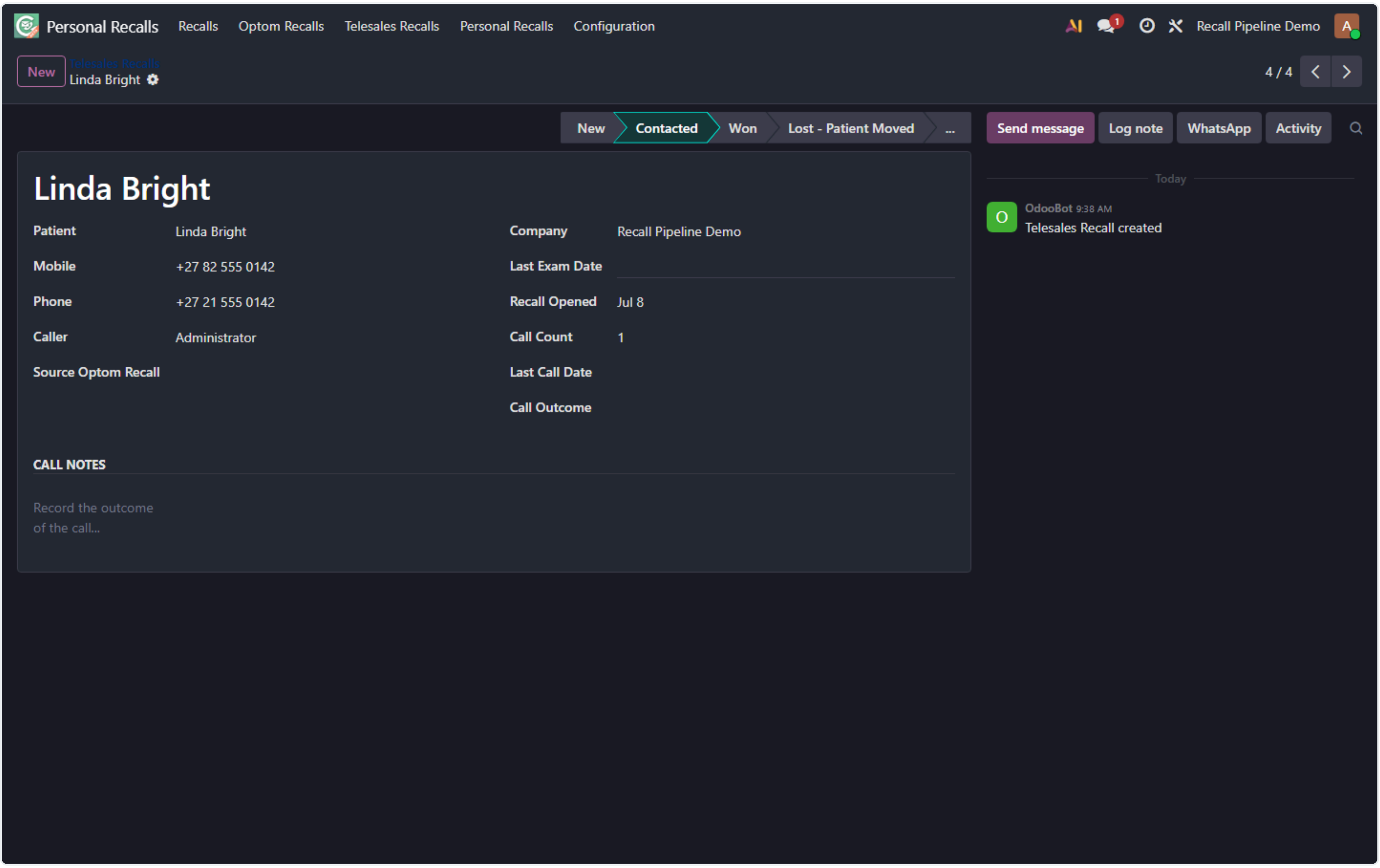
5. Stage 3 — Telesales Recalls (call queue)

Patients still outstanding after the optometrist follow-up move into the **Telesales Recalls** call queue — a worklist for the team making recall phone calls:



Open a record to make and log a call:



- **Caller** — who the call is assigned to.
- **Call Count / Last Call Date** — updated each time a call is logged.

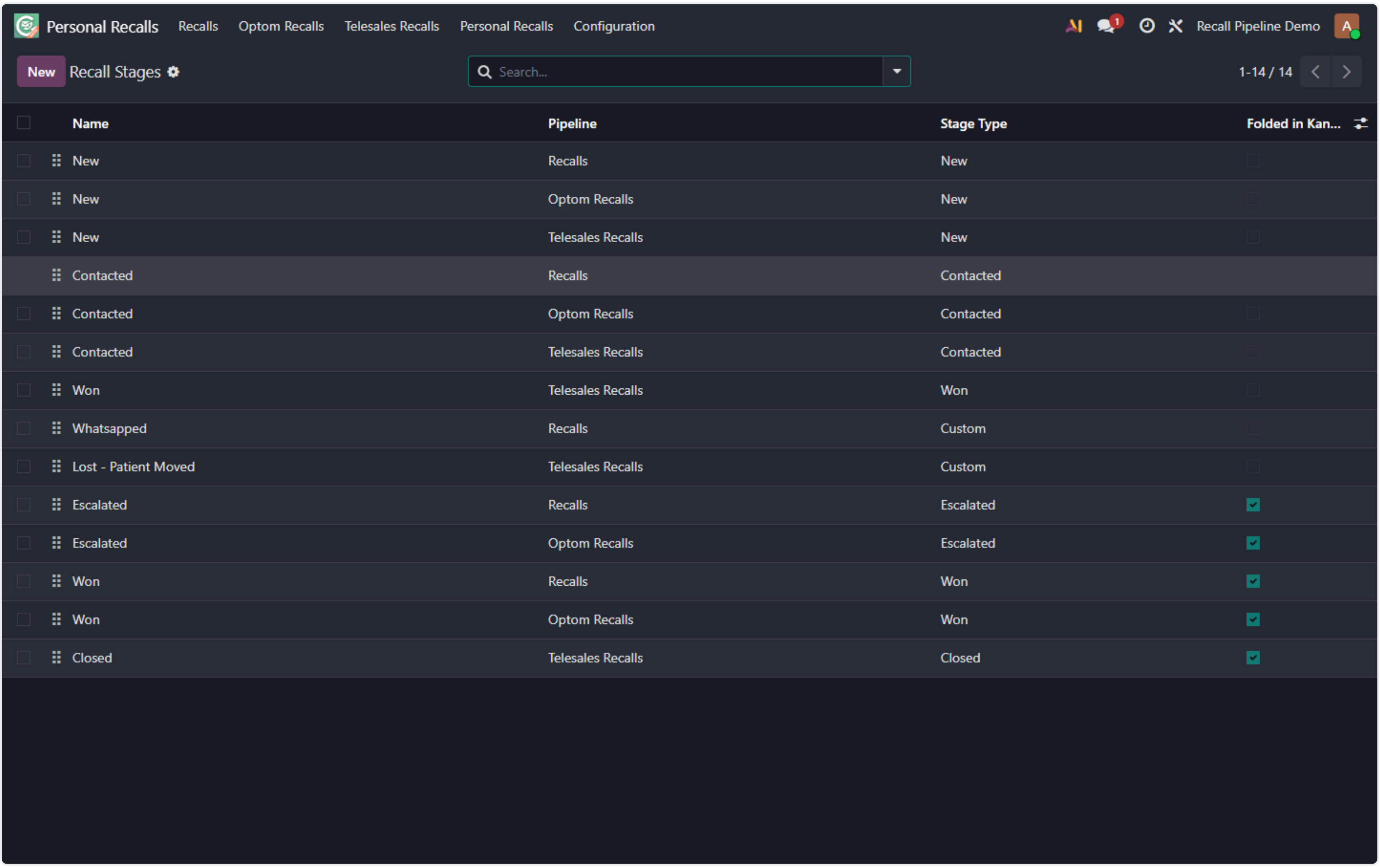
- **Call Outcome** — Booked, Not interested, No answer, or Wrong number.
- **Call Notes** — free text to record what was said.

Filter the queue to **Open Queue** (still to call) or **My Calls** (assigned to you). Booking the patient in marks the record **Won** (and archives it). When you've exhausted a patient, move them to **Closed**.

6. Managing your stages (like a CRM board)

Each pipeline's columns are yours to shape, just like a sales board. On any board you can:

- **Add a stage** — click the **+** next to the last column and give it a name (e.g. *Left Voicemail*). It's added to that pipeline only.
- **Rename or reorder** — use the column's gear menu, or drag columns left/right.
- **Fold** a column to tuck it away.



Name	Pipeline	Stage Type	Folded in Kan...
New	Recalls	New	
New	Optom Recalls	New	
New	Telesales Recalls	New	
Contacted	Recalls	Contacted	
Contacted	Optom Recalls	Contacted	
Contacted	Telesales Recalls	Contacted	
Won	Telesales Recalls	Won	
Whatsapped	Recalls	Custom	
Lost - Patient Moved	Telesales Recalls	Custom	
Escalated	Recalls	Escalated	✓
Escalated	Optom Recalls	Escalated	✓
Won	Recalls	Won	✓
Won	Optom Recalls	Won	✓
Closed	Telesales Recalls	Closed	✓

The **Won** stage is **locked** — it can't be renamed, reordered, folded or deleted, so "the patient came in" always means the same thing across every branch. The other system stages (New, Contacted, Escalated, Closed) can be renamed and reordered, but not deleted, because the automatic follow-ups rely on them. Any custom stage you add is fully yours to edit or remove.

You can also review every stage in one place under **Personal Recalls** → **Configuration** → **Recall Stages**.

7. Where finished recalls go (archiving)

To keep the boards focused on live work, a record **automatically archives** the moment it reaches a finished stage:

- **Won** — the patient came in.
- **Escalated** — handed on to the next pipeline (the new record carries on there).
- **Closed** — the telesales team has exhausted the patient.

Archived records aren't deleted — they're simply hidden from the active board. To see them, open the **Filters** menu on any board and choose **Archived**. If you ever need to reopen one, drag it back to a working stage (New / Contacted) and it returns to the board automatically.

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8. How patients leave the pipeline

A patient is removed from any pipeline as soon as they come in for an examination — the system detects the completed exam and closes the recall as **Won**. Otherwise they escalate through the stages at the month thresholds you set: Recalls → Optom Recalls → Telesales Recalls. Nobody is forgotten, and because a patient only ever has one open record at a time, nobody is chased twice.

Need this enabled, or the thresholds configured for your practice? Contact the Humint support team and we'll set it up with you.