

A1 Recall Definitions Sheet

Every place an active patient can be on the recall schedule, the rule, and where each rule came from.

PRACTICE _____

DATE _____

PART 1 Where a patient can be

STATUS	RULE AT THIS PRACTICE	WHERE IT CAME FROM
Scheduled	Active, with a hygiene visit on the schedule	
Not yet due	Active, nothing booked, due date still ahead	
Overdue, stage 1	From the due date to _____ months past due, nothing booked	
Overdue, stage 2	_____ to _____ months past due, nothing booked	
Overdue, stage 3	_____ months past due, up to the inactive line	
No interval	Active, nothing booked, no recall interval on the chart	
Inactive	Last completed visit _____ months ago or more	
Excluded	Deceased, duplicate, asked not to be contacted, moved away, checked in that order	

PART 2 The count

LINE	ENTRY
Counted from	Last completed visit
Interval set by	
Count owned by	
Reviewed	
Last month's recall visits / booked before leaving / left unbooked	_____ / _____ / _____

For record keeping, the ADA counts a patient inactive once 24 months pass without dental service. Your outreach line can come sooner; this sheet should say which one it follows.

Stages are a scheduling rule. Each patient's recall interval is set by the dentist.

SIGNED _____ (DENTIST) DATE _____

Counts and totals only: no patient names on this sheet.