Lakeside Family Dental
100 Lakeside Way, Suite 1, Harbor City, CA

Hygiene Recall Procedure

Owner: Hygiene coordinator | Reviewed every January | Version 3

Purpose

Every active patient should always have a next hygiene visit on the schedule. A patient who leaves without one is the patient most likely to fall away from care, so this procedure starts at checkout, not months later.

Recall intervals

- Healthy adults and children: every six months.
- Periodontal maintenance: every three or four months, as the hygienist notes in the chart.
- The interval is set by the hygienist at each visit and entered before the patient leaves the chair.

Pre-appointing at checkout

The hygienist walks the patient to the front desk and says the interval out loud: "We will see you again in six months." The front desk books that visit before taking payment and texts the confirmation while the patient is still there.

Working the unscheduled list

Twice a week, Tuesday and Thursday mornings, the hygiene coordinator works the list of active patients who are due or overdue with nothing booked. Each patient gets up to three touches:

- Two weeks before the due date: an automated text with a booking link.
- On the due date: a personal phone call. Leave one short voicemail, never more than one a week.
- Thirty days overdue: a letter or email from the hygienist by name.

What to say on a recall call

"Hi, this is (your name) from Lakeside. (Hygienist) asked me to reach out. You are due for your cleaning, and I have a morning or an afternoon open next week. Which is better for you?"

Recording the outcome

- Log every attempt in the patient's contact notes the same day: date, method and result.
- A patient who asks to stop hearing from us is flagged "do not contact" and removed from the list.
- A patient who has moved or chosen another office is made inactive, with the reason.

Checking the results

Once a month the office manager reviews how many active patients have a hygiene visit booked and

how many are overdue, and shares both numbers at the team meeting.