

Leveraging the Downturn to Prepare for the Upturn



As practices are facing the most profound and extreme business challenges imaginable, we want to share our expertise and “best practice” ideas as well as those we are witnessing from clients and colleagues. While some practices have a small team on site, others are mandated to be closed. Many practices have specific staff who can dial in to the office from home or via internet access the cloud management software. We'll offer some proactive suggestions that will be posted weekly. We feel these ideas will allow you to be proactive and prepared when the time arrives to start recovery.

We will create instructions for these ideas by practice management software system:

Dolphin

Proactive Recall Management

Identify **Observation & Between Phases Status** that are 12 years of age and will be turning 12 years old in 2020. These are the potential Starts that will front-load practice recovery!

- Select **Patient** Under the **Field Categories** box
- Then under **Available Fields** Select the highlighted attributes

New Interactive Report

Select a category and the fields in the category will show. Then drag and drop the fields to the 'Selected' list or use the arrow buttons to move the fields back and forth among the lists to select the fields you want to use. Use the Shift or Control keys to select more than one field at a time.

Report Category

Doctor Employee Non-Patient Patient School

Field Categories

- Next Appointment Including Today
- Non-Patients
- Patient**
- Patient Alerts
- Patient Carecalls
- Patient Comments (Beta)
- Patient Current Status
- Patient Custom Fields
- Patient Insurance
- Patient Letter History (Beta)
- Patient Models
- Patient Phone Numbers
- Patient Previous Status
- Patient Professional
- Patient Schools
- Patient Status History

Available Fields

Search: All

- Patient's Gender
- Patient's Greeting
- Patient's Group Membership
- Patient's ID
- Patient's ID (Guid)
- Patient's Keywords
- Patient's Last Name
- Patient's Name (First Last)
- Patient's New Patient Exam Date
- Patient's Next BirthDate

Selected Fields

- Patient's Name (Last First)
- Patient's Age (Years and Months)

Help OK Cancel

- Return to the **Field Category** box and select **Patient Current Status**
- Under the Available fields select the highlighted attributes

New Interactive Report

Select a category and the fields in the category will show. Then drag and drop the fields to the 'Selected' list or use the arrow buttons to move the fields back and forth among the lists to select the fields you want to use. Use the Shift or Control keys to select more than one field at a time.

Report Category

Doctor Employee Non-Patient Patient School

Field Categories

- Patient Current Status**
- Patient Custom Fields
- Patient Insurance
- Patient Letter History (Beta)
- Patient Models
- Patient Phone Numbers
- Patient Previous Status
- Patient Professional
- Patient Schools
- Patient Status History
- Questionnaire:Extraction Request
- Questionnaire:New Patient Exam
- Questionnaire:Roncone - Clinical Exam Su
- Questionnaire:Roncone - Composite Code:
- Questionnaire:Roncone - Database
- Questionnaire:Roncone - Diagnostic Reco

Available Fields

Search: All

- Patient Is In Phase II and Full Retention**
- Patient Is In Pre-Treatment Statuses Stat
- Patient Is In Retention Status
- Patient Is In Starts Needed Status
- Patient Is In Starts Scheduled Status
- Patient Is In Treatment Status
- Patient's Actual Months in Status
- Patient's Current Status Code
- Patient's Current Status Start Date
- Patient's Estimated Completion Date

Selected Fields

- Patient's Name (Last First)
- Patient's Age (Years and Months)
- Patient's Current Status Description

Help OK Cancel

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- Continue to return to the **Field Category** box and follow the pictures to acquire the needed attributes

New Interactive Report

Select a category and the fields in the category will show. Then drag and drop the fields to the 'Selected' list or use the arrow buttons to move the fields back and forth among the lists to select the fields you want to use. Use the Shift or Control keys to select more than one field at a time.

Report Category
 Doctor Employee Non-Patient Patient School

Field Categories

- Financial Fields
- Financials All Accounts
- Financials Billing Party Amounts
- Financials Insurance Only Accounts
- Financials Patient Amounts
- Last Appointment
- Last Dismissed Appointment
- Ledger Items (Beta)
- Next Appointment**
- Next Appointment Including Today
- Non-Patients
- Patient
- Patient Alerts
- Patient Carecalls
- Patient Comments (Beta)
- Patient Current Status

Available Fields

Search: All

- Next Appointment Reminder Method = PI ^
- Next Appointment Reminder Method = S
- Next Appointment Sooner if Possible
- Next Appointment Specialty Code
- Next Appointment Specialty Description
- Next Appointment Status Code
- Next Appointment Time
- Next Appointment Type Code
- Next Appointment Was Confirmed
- Patient Has a Future Appointment

Selected Fields

- Patient's Name (Last First)
- Patient's Age (Years and Months)
- Patient's Current Status Description
- Next Appointment Date**
- Next Appointment Type Description**

Help OK Cancel

New Interactive Report

Select a category and the fields in the category will show. Then drag and drop the fields to the 'Selected' list or use the arrow buttons to move the fields back and forth among the lists to select the fields you want to use. Use the Shift or Control keys to select more than one field at a time.

Report Category
 Doctor Employee Non-Patient Patient School

Field Categories

- Questionnaire: Roncone - Composite Code
- Questionnaire: Roncone - Database
- Questionnaire: Roncone - Diagnostic Reco
- Questionnaire: Roncone - New Patient Exa
- Questionnaire: Roncone - Post Diagnostic
- Questionnaire: Roncone - Post TX Evaluati
- Questionnaire: Roncone - Pre-Deband Che
- Questionnaire: Roncone - Treatment Plan
- Questionnaire: Sample for Aquarium
- Questionnaire: TxOrganizerData
- Recall**
- Referred In By
- Referred Out To
- Schedule
- Scheduled Charge
- Super Questionnaire: AAO - Informed Cons

Available Fields

Search: All

- Has a Recall Date
- Recall Code
- Recall Comment
- Recall Provider Name (First Last)
- Recall Provider Name (Last First)
- Recall Specialty Code
- Recall Specialty Description
- Recall Type is Patient Exam
- Recall Type Minutes

Selected Fields

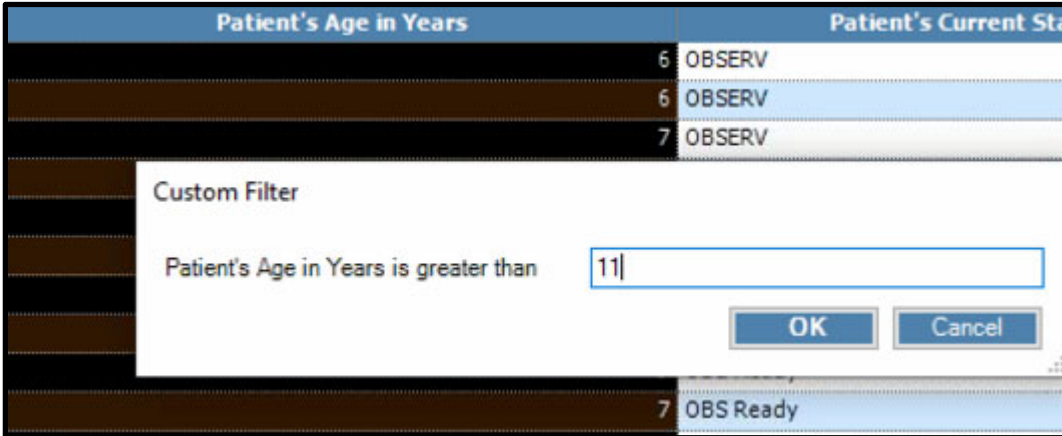
- Patient's Name (Last First)
- Patient's Age (Years and Months)
- Patient's Current Status Description
- Next Appointment Date
- Next Appointment Type Description
- Recall Date**
- Recall Description**

Help OK Cancel

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Begin to Filter the Report

- Once all fields are selected, select OK.
- Now let's sort the report
 - Right mouse click on the title – **Patients' Age in Years**
 - Select **Number Filters...**
 - Select **Greater Than and enter the desired age** – example is 11, click OK



- Right mouse click on the title – **Recall Date**
- Select- Sort **Oldest to Newest** – this will put the patients without a Dolphin Recall at the top
- Review the list and begin to contact patients that do not have a Recall or have an expired Recall

