

Leveraging the Downtime for a Stronger Recovery



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 certain 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.

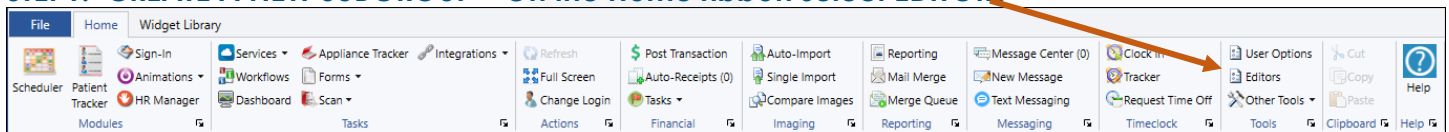
We will create instructions for these ideas by practice management software system:

ORTHO2 EDGE

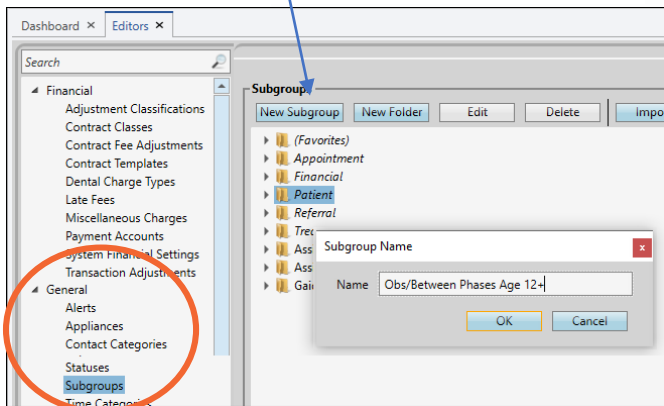
Proactive Recall Management

Identify potential starts in **Observation & Between Phases Status** or other Pre-Tx/Ph II Pending Statuses

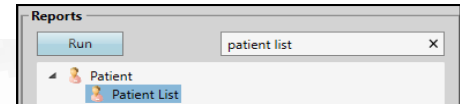
STEP 1: CREATE A NEW SUBGROUP – On the Home ribbon select EDITORS



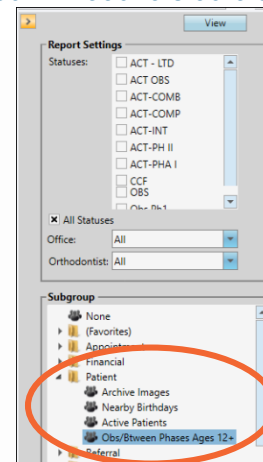
General > Subgroups > Highlight Patient > Select New Subgroup > Name Obs/Between Phases Ages 12+ / OK



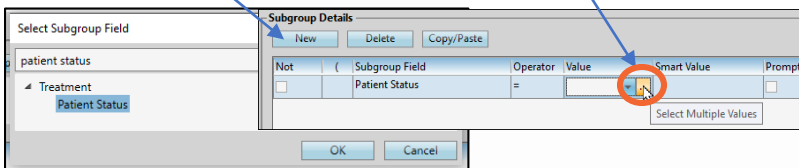
STEP 3: From the Home ribbon, select **Reporting**. In the Search box type Patient List. Select Patient List, RUN.



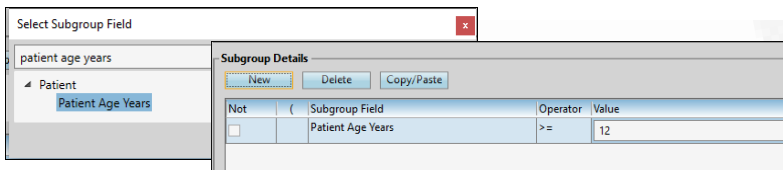
STEP 4: Under Subgroup select Patient / **Obs/Between Phases Ages 12+**. Select **View**. To see additional details on this report (i.e. next appt, age, last appt etc.) you will need to create a Widget.



STEP 2: At the bottom of the screen, under Subgroup Details select **New**. In the Subgroup Field pop-up window select **Patient Status** / OK. In the value field choose Select Multiple Values, then select your statuses / OK.



Under Subgroup Details Select **New**. In the subgroup pop-up window select **Patient Age Years** / OK. Select Operator field and select the symbol **>=** In the Value Field type **12**. **SAVE**



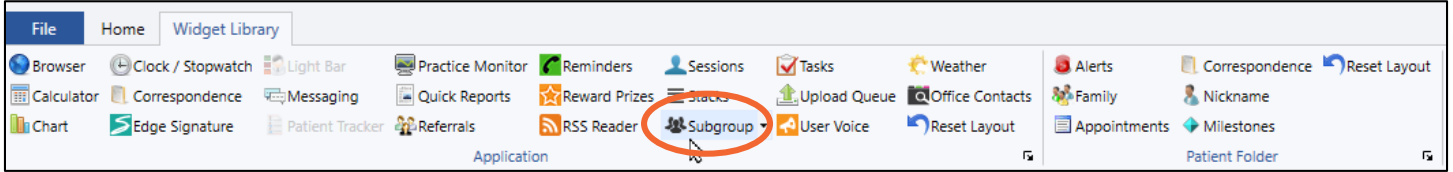
ACTION: If New Patient Calls are slow when the recovery begins, these 12-14 year olds could be the patients who fill many of the exam slots and become STARTS. Contact and schedule the appropriately due patients.

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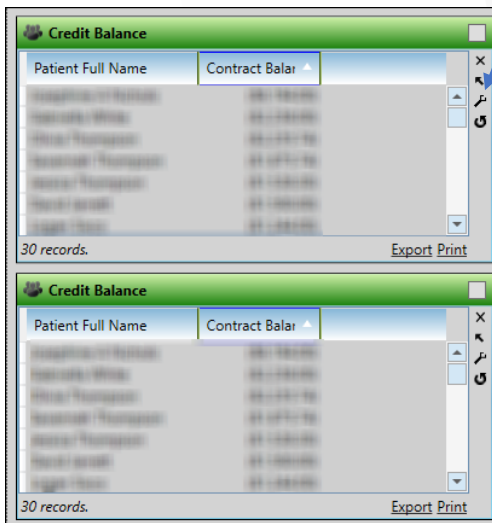


CREATING A WIDGET

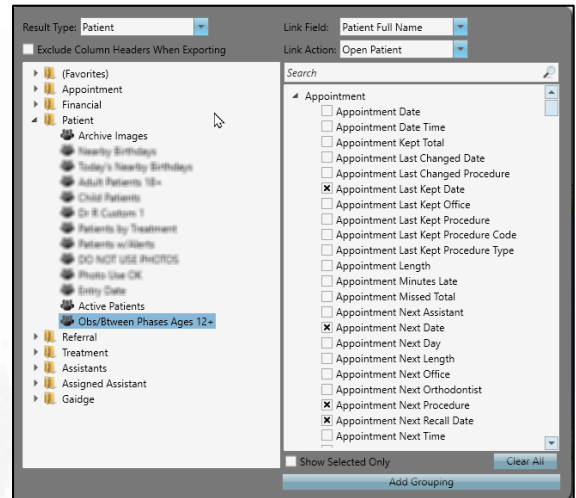
STEP 1: On the Widget Library ribbon click on the word **Subgroup** – this will copy and paste the last widget you created. Once you complete step 4 your Widget will automatically be renamed.



Step 2: On the copied Widget select the wrench

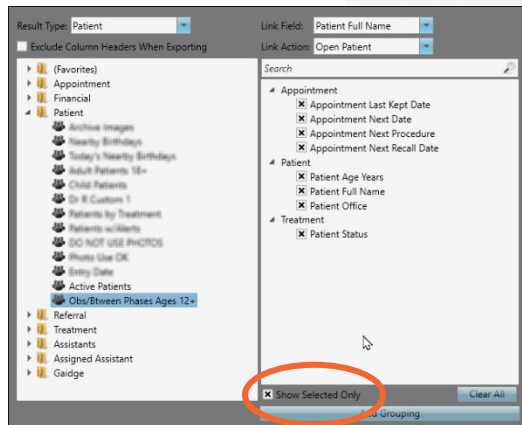


Step 3: Select **Patient** and **Obs Between Phases Ages 12+** (this will rename your widget) Select the following criteria from the list: Appointment Last Kept Date, Appointment Next Date, Appointment Next Procedure, Appointment Next Recall Date, Patient Status, Patient Age Years, Patient Full Name, Office Abbreviation (multiple locations) multiple offices



Step 4: Check the Show Selected Only box to review your list of criteria. Uncheck any details you do not want to see on your report.

THERE IS NO SAVE OR CLOSE BUTTON



Step 5: Click on a column header to sort by that criteria. Drag the headers to resort the columns. Click on a name to open the patient. Select the white box to expand the view.

Patient Full Name	Appointment Last Kept Date	Appointment Next Date	Appointment Next Procedure	Patient Status	Patient Age Years	Appointment Next Recall Date	Patient Office
Archie, Elizabeth	12/16/2019	12/14/2020	Prog Con, ck to start	OBS	12		FRE
Colburn, David	11/11/2019	11/10/2020	Active Progress Consultation	ACT OBS	12		FRE
Colburn, Connor	2/26/2020	11/4/2020	Prog Con, ck to start	OBS	12		FRE
William, D. McLeod	3/3/2020	11/2/2020	Progress Consult	OBS	12		FRE
Alvarado, Benjamin	10/23/2019	10/21/2020	Prog Con, ck to start	OBS	12		MTN
Walt, C. Crawford	10/16/2019	10/13/2020	Progress Consult	OBS	12		FRE
Oliver, David	10/8/2019	10/5/2020	Prog Con, ck to start	OBS	12		MTN
Wheeler, Nicholas	10/2/2019	9/30/2020	Prog Con, ck to start	OBS	12		FRE
Colburn, David	11/6/2019	8/3/2020	Progress Consult	OBS	12		FRE
Wheeler, Benjamin	8/8/2019	8/3/2020	Active Prog Con, ck to start	ACT OBS	12		MTN