



ORTHO2

Examining and Updating Status and Phase on Existing Patients

So you've read the Phase and Status article and decided that the Phase and Statuses listed on your active patients are inconsistently correct and need some work. The question now is how to you get from where you are now to having corrected Phases and Statuses on your active patients and then keeping them that way.

These are simply suggestions and you may need to modify the system to better meet the needs of your office:

1. Download the report Patient Name/Status and Phase from Report Repository
2. Read Status and Phase in Consultant's Corner and decide what Statuses and Phases you would like to keep or eliminate or add.
3. If you have certain Phases or Statuses that you would like to inactivate (e.g., Converted), I would suggest simply going into tables and typing a z in front of the name prior to running the report. This makes it very easy to see on the report and quicker to correct.
4. Create a sub-group for active patients. This usually cannot depend on Phase or Status since this may not be correct. You may want it to be based on all patients last seen within the last two years or something like that. Call support with any questions.
5. Run new report with the subgroup.
6. You will need to look at each patient and start correcting their Phase and Status.
 - a. To figure out Phase
 - i. Look at fee
 - ii. Look at treatment plan
 - iii. Look at treatment notes
 - b. To figure out Status
 - i. Look at appointment history
 - ii. Look at treatment notes

by **Natalie Beaton**

7. There may be a little guess work involved. Be sure to add in appliance removal date if that is appropriate and dismissal date also if that needs to be done. Consider adding Auto Events to procedure codes for Status changes whenever possible for the future so that the computer will prompt you to change the Status.
8. You may want to download (if you haven't) the New Patient Tracking Report (have your TC call support) and have her work on Phase and Status for all NP Exams for the last two years. She may remember a lot of them and it will go faster for her. There may be a lot of Will Calls that have fallen through the cracks that with a little follow through, is money in the bank.

Good Luck! If everyone works on it a little at a time, this can get done. I have found if each team member takes a single page and keeps it with them; they can do one or two patients during short breaks in their schedule. It's also a great project for non-Doctor days. Maybe not GREAT but very rewarding once it is done. ☺

"When you have a great and difficult task, something perhaps almost impossible, if you only work a little at a time, every day a little, suddenly the work will finish itself." - Isak Dinesen

About the Author



Working exclusively with Ortho2 clients, Ms. Beaton has a practice management focus that maximizes the use of the technology specific to ViewPoint software. Ms. Beaton's extensive knowledge of both the most current practice management trends and the ViewPoint system allows her to help any office to turn ideas into day- to-day reality.