



ORTHO2

Let's Get the Family Together

The capability in ViewPoint to link family members has many advantages for your practice. With all family members linked, both the Treatment Coordinator and the Doctor have immediate access to information about the treatment plans and fees of other family members. This can also be very helpful when adding a new sibling because Responsible Party and Insurance information can be transferred to the new account very easily. In addition, the staff can easily access appointment information for other siblings as an appointment is being scheduled. This makes coordinating appointments a breeze and is a wonderful service to busy parents.

Linking family members in an existing database is really not as daunting a task as it may seem. The first step is to go into Practice Reports. Choose the Patient tab and then choose Patient Address List. (Matching addresses really speeds up figuring out which people belong in the same family.) You may want to exclude certain Statuses (e.g. Never Treated). If so, use sub-grouping to exclude people you don't want to link. Print this list as well as the Different Last Names report (also found in the Patient section of Practice Reports). Use these reports to identify the members of each family you will be linking.

So now you have Ann Smith, Naomi Smith and Joseph Brown (same family-different last name!) and they all belong together. Open Ann's folder and click the Family tab. Select Reassign Family. Scroll down the Smiths until Naomi's name appears. Select OK. Now Ann and Naomi are linked. Go into Joseph's folder and click on the Family tab. Select Reassign Family and scroll to the Smiths until you see Ann and Naomi listed. Click OK and now all three people are linked.

Additional information about the Family tab is available in the ViewPoint Training & Users Guide and in ViewPoint Help. These resources also include instructions for adding a new sibling. Just be sure to click Make Patient if that sibling is going to be seen as a patient.

by **Natalie Beaton**

The many advantages of linking families together in ViewPoint make it well worth the effort to get it done. Once you have it set up correctly, you'll wonder how you ever got along without it! ☺

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.

Prior to forming her own consulting business, Ms. Beaton had over eighteen years of hands-on experience in both the orthodontic and dental industry in varied roles of treatment coordinator and financial administrator.

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