



ORTHO2

New Report: Let the Computer Do the Work

It is with tremendous excitement that I can let you know about a new way to let the computer gather your data for the next day's morning meeting. After communicating with numerous consultants and looking at what many offices use for their morning meeting, I designed a generic Morning Meeting Report that I hope will meet most offices' needs. Tricia Rose is creating the report for use with ViewPoint, and it will be available on the Ortho2 website in the Report Repository by the end of April.

The Morning Meeting Report includes the following sections and information:

- New Patients scheduled—patient name, age, dentist, referral source, and responsible party phone number
- Starts scheduled—patient name, procedure code, appointment reminder, and responsible party and phone number
- Debands scheduled—patient name, procedure code, appointment reminder, number of months in treatment, account balance, and number of previously kept, missed, and cancelled appointments
- Comfort Care, Special, or Emergency Patients scheduled—patient name, procedure code, appointment reminder, number of months in treatment, last kept appointment, and next scheduled appointment
- Cancellations—patient name, procedure code, appointment time, account balance, and responsible party phone number
- Statistics—number of new patient entries last working day, number of new patient exams last working day, records goals and records to date, and start goals and starts to date
- Comments—notes for the day or absent staff members

by **Natalie Beaton**

To download this report, visit www.ortho2.com > Support > Report Repository and click "Download Instructions." Then click the plus [+] for Appointment, and click "Download" next to Morning Meeting Report. Follow the download instructions and save the report in the Appointment folder. If you need further assistance, contact Ortho2 Software Support at (800) 346-4504.

Be sure to e-mail Tricia at trose@ortho2.com to let her know how awesome she is! She can, at the standard custom report rate, also further customize this report for offices that need slightly different information. ☺

About the Author



Over 17 years of hands-on experience in the orthodontic and dental industry and a warm teaching style has allowed Natalie Beaton to guide orthodontic teams around the country to greater practice success. Natalie's concrete, customized plans, training, and follow-up ensure that changes become an integral part of practice growth. She can be reached at joyfulchange@comcast.net or (804) 608-0780. Her website is www.joyfulchange.net.

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