



ORTHO2

Times Are Changing... STACKS of Patient Files Are A-OK!

by **Tina Byrne**

As a practice consultant, visiting offices with patient files in piles throughout the office suggests to me that there are palpable issues regarding work flow and task completion. First and foremost, team members are no doubt spending enormous amounts of time looking for patient charts "missing" from the central file system. *I'll wager a guess that the "missing" are a frequent topic of discussion at your morning meetings. Second, the old sticky note system frequently fails us when trying to actually implement the necessary task once the file is removed from the pile. That is, of course, if sticky notes are not already contraband. Third, if the chart cannot be located, the doctor and team may now be required to fly by the seat of their pants regarding clinical care and communication! That's a scary thought. Last, but by no means least, there is always the question as to whether the noted task was ever actually completed. If not, we blame it on the team member who failed to return the file, or the elusive sticky note that, once again, had a mind of its own and attached itself elsewhere. Does the term "inefficiency" ring a bell... not to mention stress, frustration, finger-pointing, and ensuing conflict?!*

Kudos to the Ortho2! team for the development of the ViewPoint 5.0 STACKS feature! Having an opportunity to work with many software systems, I consider STACKS to be a feature that will transcend team communication and work flow, as well as pave the way for a bona fide "paperless" environment. Anticipating the efficiency and organization created with STACKS, I couldn't wait to update and implement ViewPoint 5.0 with my Ortho2! clients. If you haven't already taken the initiative to begin using the STACKS feature, it would be my pleasure to share with you the ways in which we are streamlining work flow with STACKS.

Decide on Types of STACKS

For practices using paper patient files, note the possible "routes" that a file may take after being pulled from

the central location. Piles of incomplete files begin to accumulate in various locations... the doctor's desk, the front desk, or an alternate location... the true meaning of a file on wheels. Practices using electronic treatment charting may have implemented other means of documenting necessary notes such as a checklist. If any of this sounds familiar, it is time to start thinking paperless!

Consider the benefits of STACKS:

- Insurance Verification – Obtain insurance information during the new patient call in order to verify benefits prior to the patient appointment and present fees during the initial exam.
- Treatment Plan – Identify a patient after the completion of diagnostic records or lab work.
- Contract/Informed Consent – Note a scheduled start procedure allowing the Financial Coordinator to prepare a proposed contract and forms for the day of the appointment.
- Patient Correspondence – Route a patient for correspondence from the treatment area to avoid generating a merge document on demand.
- Doctor Specific – Ensure follow-up for a patient with specific needs.
- Care Calls – Identify a patient due for a care call after initial placement of appliances or a difficult procedure.

Configure STACKS in ViewPoint

With a patient folder open, select the STACKS icon on the toolbar.



When the STACKS window appears, create each of your STACKS by typing the name, and clicking the Add STACK button.

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Create prompts for STACK charts

Many times a task is indicated as particular procedures are scheduled or kept. Configure ViewPoint to generate a prompt to place a patient in STACKS. This is possible by creating messages in the Message Box.

From the Main Menu click Systems Tables and System. Then open Message Box. Create your STACK messages:

STACK CARE CALL
STACK CONTRACT/INFORM CONSENT
STACK INSURANCE VERIFICATION
STACK TREATMENT PLAN

Now you will be able to link each STACK to a procedure code.

Create Auto-Events to prompt adding a patient to STACKS

Once you have created messages in the Message Box table, you want each STACK message to be displayed as an auto event when appointments are processed.

Begin by clicking the Grid icon on the ViewPoint toolbar.



Then on the Grid Scheduler toolbar, click the arrow next to Grid Tools.



Click Procedures on the menu which appears.

Select the appropriate procedure and click the Auto-Events tab.

Choose the time of processing you would like the prompt displayed in the Appointment status triggers section, and choose the prompt in the Message box to display field.

Now when processing this procedure, you will receive a reminder to send the patient to a STACKS!

By organizing the system in this manner, ViewPoint STACKS will ensure improved communication and efficiency.



Using STACKS

Adding Patients

With the patient folder open or active, simply click the STACKS icon on the toolbar, select the desired STACK(s), click Add Patient at the bottom of the screen. Unlike routing a patient chart throughout the office, the STACKS function allows for adding patients to more than one STACK at a time.

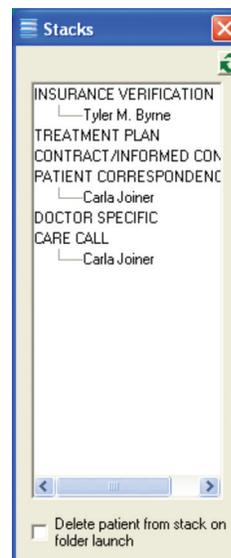


Viewing

Staying on top of the work to be done is effortless by simply clicking View on the Menu Bar, and choosing STACKS.

You are able to open patient charts by simply clicking on the patient name displayed in the STACKS window.

Removing Patients



Patients may be removed from STACKS by either electing to "Delete patient from STACK on folder launch" or by right clicking on a patient and selecting "delete." You may want to manually remove patients from STACKS at the onset and later choose to remove automatically, once you are familiar with using the feature.

Paper or paperless, your team will quickly realize how invaluable STACKS can be to managing the daily work flow. Happy STACKing! ☺

About the Author



As a practice consultant with more than 30 years of experience in the field of orthodontics, Tina Byrne has well-founded proficiencies in clinical, business, and administrative functions. As a presenter at annual Ortho2 Users Group meetings, her knowledge of ViewPoint, leadership qualities, and upbeat presentation style offer a fresh perspective on the many challenges faced daily by the entire orthodontic team.