



ORTHO2

What's in Your Toolbox?

by **Tina Byrne**

Prior to discussing consulting services with a doctor, I perform a complimentary remote evaluation of their systems and productivity. Why you ask? Frankly because I prefer a win-win working relationship, and moreover to gain insight into the depth of configuration and utilization of the practice management software (PMS) program. PMS is the most important tool for an orthodontic office. In addition to patient management, it's a means to establish efficiency, maintain productivity, and measure the success in all areas of a practice!

The majority of offices I visit for the first time are using approximately 25% of their PMS resources, are unaware of the functions, and/or are uneducated on the system. They don't know what they don't know AND they don't know what's in their toolbox!

In Edge Cloud, the Dashboard, Subgroup Widget, and Quick Reports have become my go to functions in organizing team members for task preparation and patient follow-up.

1. The Dashboard is user-defined and can be loaded with widgets specific to each team members' tasks.
2. Subgroup Widgets allow you to load a subgroup and define the fields you want to view for the patients.
3. Quick Reports allow users to save reports they use frequently. If team members are responsible for numerous reports, the reports can be placed into a folder and generated all at once.

Let's look at what is typically the team's daily preparation for patients on the schedule and the manner in which they can become more efficient with the program. These numbers can also be pulled in ViewPoint, which we address in each scenario.

Financial Coordinator

Task: Review patients beginning treatment to be certain contracts are in place and forms are prepared for signature

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Appointment Next Procedure = procedures to be reviewed
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list

Appointment Date	Appointment Next Time	Patient Full Name	Appointment Next Procedure	Insurance Company Name
11/22/2017	10:40 AM		Records Scan	
11/22/2017	8:00 AM		Records Scan	
11/22/2017	10:40 AM		Records Scan	
11/22/2017	4:00 PM		Records Scan	

- Each day, simply change the date by clicking the wrench icon to view the desired day

In ViewPoint:

- Create a subgroup with the following parameters:
 - Appointment Next Date – Prompt
 - Appointment Next Procedure = procedures to be reviewed
- View the list by clicking Actions > Subgroup List and choose your subgroup from the list

Task: Identify patients with overdue accounts for financial discussion

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Contract is Insurance = No
 - Days Past Due >= 30
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list

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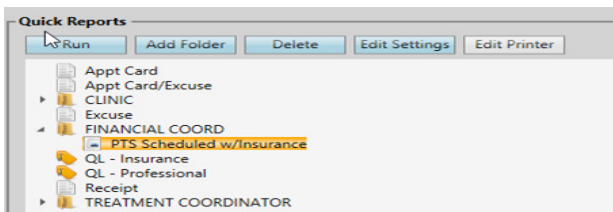
Appointment Next Ti	Patient Full Name	ResParty Full Name	Days Past Due	Contract 30 Days Past Due	Amount Due Misc Charge
11:00 AM			93	\$139.00	\$0.00
12:30 PM			73	\$0.00	\$300.00
2:40 PM			41	\$0.00	\$200.00
3:30 PM			110	\$173.30	\$0.00

- Each day, simply change the date by clicking the wrench icon to view the desired day

In ViewPoint, run the Appointment Day Sheet - Financial report.

Task: Review insurance accounts of patients in the event information or discussion is needed

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Contract is Insurance = Yes
 - Contract Balance >0
- Print the Open Insurance report with that subgroup to review for any problems with insurance account. Save it to Quick Reports



- Each day right click on your quick report, select edit settings to change the date

In ViewPoint:

- Create a subgroup with the following parameters:
 - Appointment Next Date – Prompt
 - Insurance = Yes
 - Balance – Greater than – 0
- Run the Insurance Detail By Company report and choose the subgroup you created

Clinical Team

Task: Check of appliances to be delivered for the day and that the appliances are ready

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Appointment Next Procedure = procedures to be reviewed
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list

Patient Full Name	Patient Status	Appointment Date	Appointment Next Procedure
	RET	11/20/2017	DEL ESSIX
	FUL-C	11/20/2017	DB / Del Haw Ret

- Each day, simply change the date by clicking the wrench

icon to view the desired day

In ViewPoint:

- Create a subgroup with the following parameters:
 - Appointment Next Date – Prompt
 - Appointment Next Procedure = procedures to be reviewed
- View the list by clicking Actions > Subgroup List and choose your subgroup from the list

Task: Review of patients on the schedule over treatment time or nearing treatment time

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Patient Status = all active treatment statuses
 - Treatment Expected Removal <= Today
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list

Appointment Time	Patient Full Name	Patient Status	Treatment Expected Removal	Treatment Actual Removal
4:20 PM		C2P	7/8/2017	
4:00 PM		FUL-C	11/3/2017	
11:50 AM		FUL-C	9/30/2017	
2:00 PM		MF-A	12/30/2016	
10:00 AM		FUL-C	6/7/2017	

- Each day, simply change the date by clicking the wrench icon to view the desired day

In ViewPoint:

- Create a subgroup with the following parameters:
 - Appointment Next Date – Prompt
 - Status = all active treatment statuses
- Run the Exceeds Length of Treatment report and choose the subgroup you created

Task: Care Calls to Previous Days Start Procedures

- Create a subgroup with the following parameters:
 - Appointment Date – Prompt
 - Appointment Status = Kept
 - Appointment Last Kept Procedure = all start procedures
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list

Patient Full Name	ResParty Full Name	Appointment Last Kept Procedure	ResParty Phone
		Start Appt - Bonding U/L	6851
		BOND U/L	3602
		Start Appt Bond 1 Arch	-1163
		BOND U/L	-1136

- Each day, simply change the date by clicking the wrench

icon to view the desired day

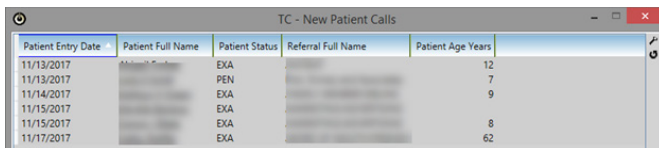
In ViewPoint:

- Create a subgroup with the following parameters:
 - Last kept date – Prompt
 - Last kept procedure = all start procedures
- View the list by clicking Actions > Subgroup List and choose your subgroup from the list

Treatment or Marketing Coordinator

Task: Report New Patient Calls and Referral Sources

- Create a subgroup with the following parameters:
 - Patient Entry Date >= Prompt
 - Patient Entry Date <= Prompt
- Dock a Subgroup Widget on the Dashboard, select the fields below to be visible, and review the patients in the list



Patient Entry Date	Patient Full Name	Patient Status	Referral Full Name	Patient Age Years
11/13/2017		EXA		12
11/13/2017		PEN		7
11/14/2017		EXA		9
11/15/2017		EXA		
11/15/2017		EXA		8
11/17/2017		EXA		62

- Each day, simply change the date(s) by clicking the wrench icon to view the desired day(s)

In ViewPoint

- Create a subgroup with the following parameters:
 - Entry date – Range of dates - Prompt
- Run either the Patient Biographical report or Subgroup List depending on what you plan to do with the patient.

These are only a few examples of the set up for several daily tasks utilizing only three functions of Edge Cloud. The possibilities are endless!

If your team is unaware of all the functions your program offers, I encourage you to take advantage of the online training materials at www.ortho2.com > Support and Learning > Visual Help . Don't hesitate to contact Ortho2 support for assistance with configuration of your subgroups, and if you want to take your practice to the next level with your program – attend the Ortho2 Users Group Meeting. You won't be disappointed. ☺

About the Author



Tina Byrne's leadership qualities and upbeat presentation style provide a fresh perspective on the many challenges faced daily by the entire orthodontic team. Tina is presenting at the 2018 Users Group Meeting in Savannah, Georgia.