

Patient Rewards for Edge and ViewPoint

by Wesley DeShaw

Edge and ViewPoint have a new feature - Patient Rewards. This system allows you to calculate points and track rewards you offer as incentive to motivate patient attendance, treatment cooperation, oral hygiene, and more.

Patients can trade the points they earn by completing common treatment activities for prizes from your office. This use of positive reinforcement helps motivate patients to be prompt to their appointments, scheduling their next appointment while in the office, filling out online forms, and even keeping their six-month dental checkup.

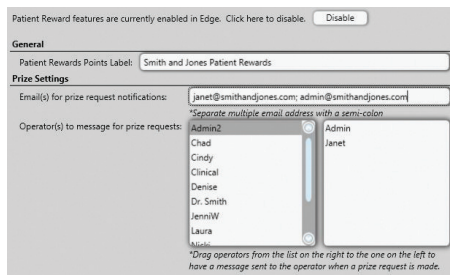
It's easy to start using this system with every patient, including recall patients. Patients use customized cards to keep track of their points each time they sign in.

Patient Rewards Setup

Setting up your reward system in Edge and ViewPoint is the same once you navigate to the setup screen.

In Edge, click Editors in the Tools tab of the Home ribbon bar. Click Setup under Patient Rewards.

In ViewPoint, click Patient Rewards in the Home ribbon bar, and choose Setup. Then click the Setup tab.

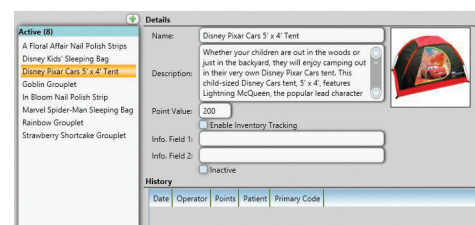


Use the Patient Rewards Points Label field to name your patient rewards. This is the label that will print on appointment cards, and is what patients will see when they receive point notifications and use the Prize Selector to review their point balance and redeem points for prizes. Use the table on this page to set up who receives an

e-mail or message when a prize is requested.

Next, fill in information about the prizes your office will give out. In Edge, click Prizes in the Editors. In ViewPoint, click the Prizes tab of the Patient Reward Setup window.

- **Name** – Enter a description of the prize. The name appears in the Prize Selector that patients see when they are browsing for prizes.
- **Description** – Enter a detailed description of the prize.
- **Point Value** – Enter the default number of points a patient must redeem to obtain this prize.
- **Enable Inventory Tracking** – Enable this option if you want the Patient Rewards system to automatically decrease the number of prizes in your inventory whenever this prize is processed for a patient.
- **Quantity** – Enter the number of this type of prize that you currently have in your inventory.
- **Pending Requests** – This field indicates the number of pending patient requests for this prize, to help you decide whether re-stocking the item is necessary.
- **Info. Fields** – Use the two Info. Fields to track additional information about the prize, such as where you purchase the items, or how much they cost.
- **Image** – Optional. Drag a picture of the prize onto the photo box, or click the box to browse for a picture file you have stored on your computer. This image appears in the Prize Selector that patients see when they are browsing for prizes.



Each program allows you to designate events when patients earn or lose points for common patient actions such as early sign-in, scheduling an appointment before leaving the office, keeping dental checkups, logging into mobile apps, and referring a patient.

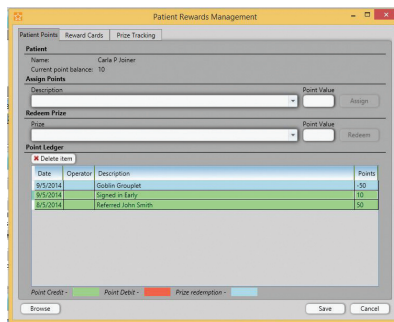
To do this in Edge, click Point Triggers in your Editors under Practice Connect. In ViewPoint, click the Reward Triggers tab of the Patient Reward Setup window.

Finally, create a list of additional ways individual patients and subgroups of patients can earn points, such as attending your office open house, earning good grades at school, or volunteering in your community.

In Edge, use the Custom Point List Editor. In ViewPoint, click the Custom Point List tab of the Patient Reward Setup window. Click the green plus sign to add a new action. Then enter a description and point value. Save your changes.

Managing Patient Points and Prizes

Use the Patient Rewards Management window to add and deduct patient reward points, redeem prizes, and review the patient's reward ledger.



In Edge, open a patient folder, and select Patient Rewards in the Patient tab. In ViewPoint, click Patient Rewards in the Home ribbon bar, then click Manage Patient Rewards. If you don't have a patient active, use Fast Find to search for a patient.

The Patient Points tab shows the patient's name and current point balance, as well as the patient's ledger of how points have been accrued. Additionally, you can assign points for items that are not included in either the Point Triggers or the Patient Reward Custom Point lists. You can also redeem prizes the patient has requested.

The Reward Cards tab allows you to associate and inactivate patient reward cards. To associate a card, click the green plus sign next to Associate Card, and then swipe the card. That card is now registered to the patient. You can enter a description of the card, such as the patient's nickname, if desired. Contact Quality Resource Group to order personalized patient rewards cards. In addition, you will also need an unencrypted keyboard emulation swiper, such as the one you use to process credit and debit card payments.

The Prize Tracking tab allows you to view all prizes that have been redeemed in the time frame selected.

Assigning Reward Points to Subgroups

In Edge, click Other Tools > Assign Reward Points via Subgroup in the Tools tab of the Home ribbon bar. Select the description to use from your Custom Points table, or type a new description for the award. You can then change the default point value to assign, if needed. Next choose the subgroup that should receive the reward points. The list of patients who will receive the points shows up in the Patient portion of the window. Individual patients can be removed from the list by selecting the desired patient and pressing the delete key.

In ViewPoint, click Patient Rewards > Assign Points to Subgroup in the Home ribbon bar. Choose a subgroup to assign the points to and click OK. Select the description to use from your Custom Points table, or type a new description for the award. You can then change the default point value to assign, if needed. Review the list of patients that will receive the points and click Assign Reward Points.

Selecting Prizes

Patients can view the Prize Selector, review their point balance, and redeem their points for prizes as they use your Patient Sign-In station. In addition, Edge customers can allow patients do the above through the Practice Connect app.



For both Edge and ViewPoint, add the Browse Prizes button to your Sign-In screen. Patients should either swipe their patient rewards card or enter their birth month and day to initiate the prize selector. If you have patients use their birthday month and day to select prizes, they must have an appointment for today. However, patients can view prizes at any time if they use their patient rewards card.

Patients can see how many points they have at the top of the screen, all available prizes, and points required for each prize. In addition, they can request prizes through the screen. ☺

About the Author



Wesley DeShaw is the Systems Consultant for the Southern Association of Orthodontists, as well as Alberta, British Columbia, Manitoba, Saskatchewan, and British West Indies. He will be teaching the Edge 101 class at the 2015 UGM.