



ORTHO2

# Secret Tips and Tricks for Your Ortho2 System

by **Derek Dohrman**

**E**dge, the cutting-edge cloud based software, has many great features for all different types of employees. Many of these features are user-specific as well. A couple of these features that aren't often used enough are the Edge Dashboard and the Subgroup Widget.

## Edge Dashboard

The Dashboard personalizes Edge for you by keeping the information and tools you use the most right at your fingertips. You



can use the dashboard widgets to display the productivity information and applications most relevant to your tasks and professional goals. The widgets and settings you choose are specific to you and you alone. They follow your user account around no matter where you login to Edge.

There are many types of widgets available. You can display something as simple as the weather outside or a calculator, to something more in depth like charts or subgroup lists.

To add a widget to your Dashboard, go to the Widget Library on the top ribbon bar. Here you will see a list of all the widgets available to you. Click on a widget and a prompt will come up asking you to choose Dashboard or Application. Dashboard will add the widget to the Dashboard with the other widgets that you have chosen. Application will float the widget in its own window so you can display it on another monitor or dock it on another part of the Edge program. Most users usually select the Dashboard option.

Once the widget is on your Dashboard, you can click on the wrench  icon to go into the settings to customize the widget. You can also click on the button on the top right corner to expand the window so see more

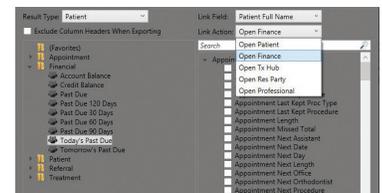
information or just simply see it bigger.

## Subgroup Widget

One of the more powerful widgets, and yet often overlooked, is the Subgroup Widget. Use this widget to keep a specific list of patients easily available to you. You can customize the fields to display in the widget, and choose to open the patient folder to a specific page. Click on the Widget Library on the top ribbon bar of Edge to access the Subgroup Widget.

In the Widget Library click on the drop down arrow next to Subgroup to pull up a list of pre-defined subgroup widgets. Then, choose a subgroup that shares the same topic as what you might be looking for. For example, if you were looking for something that has to do with patient financials, you might choose Today's Past Due. Then choose Dashboard to place this widget on your Dashboard.

Then, click on the wrench icon to go into the settings. On the left side of the settings window, you can choose which subgroup



you want to use. On the right side of the settings window, pick and choose exactly which columns you want to show up on the widget. If you want to get rid of some of the pre-selected columns, you can check the box at the bottom that says Show Selected Only, and uncheck the ones you don't want.

At the top of the settings window, you can choose one item in the widget to be a link. Use the Link Field drop down menu to select one item shown in the widget to be

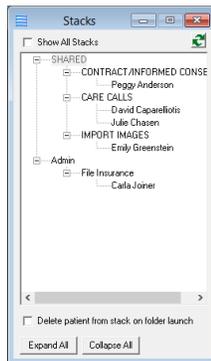
a link. Then, use the Link Action drop down menu to select what will open when you click the link.

Once you have everything setup exactly how you want it, click anywhere in the background to make this screen go away. The subgroup list should update automatically. If you do not see everything you are looking for, click on the Refresh button.

ViewPoint is a powerful software that can be used in many different ways. Because ViewPoint can do so much, some great tools can get overlooked. Stacks and Auto-Events might be the missing tools that you have been looking for.

## Stacks

One reason offices will often under-utilize Stacks is because they simply do not understand what it does or what it can do. When you think about Stacks, try to think about a physical stack of treatment charts sitting on your desk. You know why that stack of charts is there; it's to remind you to do something with that patient when you get the chance. It might be to verify insurance coverage, enter a treatment plan into the system, or even send out new patient paperwork. Using Stacks will allow you to flag patients for further action without having that chart sit on your desk. Think paperless.



To create a new Stack, simply go to Actions > Add to Stack > Edit Stacks from the ViewPoint shortcut menu. Type in the name of the New Stack that you want to create, for example, Insurance Verification, and choose the Stack Owner, or User in which this stack is for. Then simply click Add Stack.

To add a patient to your new stack, go to Actions > Add to Stack. If you did this from a patient folder, that patient's name will appear at the top, if not, simply choose Get Patient and search for a patient. Once you have your patient ready, click on the + sign next to a user name to display a list of available stacks. Then click on the stack name you want. Back at the top,

choose Add Patient(s) and the patient is now in the stack.

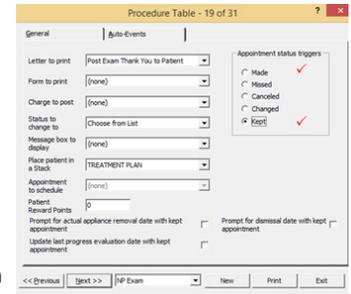
To view the list of patients in that stack, go to View at the top of ViewPoint and choose Stacks. If you want to access a patient record, simply double click on their name. You can right click on the patient name to delete them from the stack, or show all stacks by checking Show All Stacks at the top.

## Auto-Events

Auto-Events allow you to automate day-to-day processes when working with patient appointments. For example, do you always want to add a patient to a Stack and/or generate a welcome letter when your process a new patient

exam as kept? You can have ViewPoint automatically do these things for you when you processes or make an appointment. To access the Auto-Events, go to your procedure table by clicking on the Main Menu > System Tables > Patient > Appointment Procedures.

Under each procedure you can set up various events to take place. Select the procedure at the bottom, click the Auto-Events tab, and then select which trigger for when you want the event to take place (Made, Missed, etc.). On the left, select what you want to happen, i.e. print a letter or form, change a status, add a patient to a stack, or schedule the next appointment. A red check mark appears to the right of the trigger when the Auto-Event is set up correctly. ◉



# About the Author



Derek Dohrman is an Advanced Tech and Trainer with Ortho2. Derek is teaching three classes at the 2015 Users Group Meeting, including Best Practices for Edge and Best Practices for ViewPoint.