

Working with Workflows

Our annual Users Group Meeting covers many topics that offices can easily take back with them and implement right away. One of the topics we heard users were unfamiliar with is workflows.

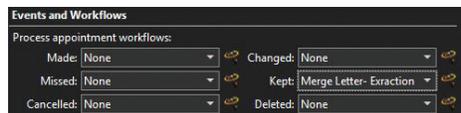
A workflow is a sequence of events or actions required by your office protocol. Depending on the type of workflow, you may be prompted to complete an action before you can continue with another task.

The possibilities are endless with workflows, but here are some of the more common ones we see in offices.

Merging Letters

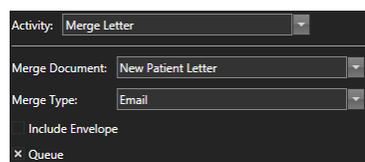
Do you often merge a letter after a specific appointment is kept? For example, perhaps you send a Consultation to Dentist letter after an exam is kept. Or maybe you want to start sending a New Patient Welcome Letter after patients make their first appointment. Workflows allows you to do so without even thinking about it!

In the Editors select Procedures from the list



on the left. Once logged in, choose the procedure you want to work with. Select the wizard icon next to the appointment status you want to work with. For example, if you want to send a letter to the patient's dentist after an appointment was kept, you would choose the workflow wizard by the Kept status.

In the Activity drop down, choose Merge Letter. This will then give you additional options to pick the



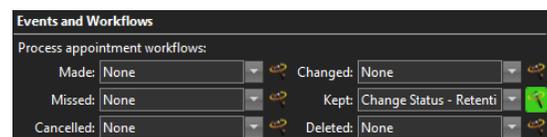
letter, select your merge type, include an envelope, and if you want to send it to the print later queue. Click Ok to exit the window. Back in the Editors window, use the drop down menu by the status you were working with to select

the workflow you created. It will look like: Merge Letter – Letter Name.

Status Changes

When patients keep their New Patient Exam, you more than likely also change their status. When you enable a workflow, each time that appointment is marked as kept, you can be prompted with changing the status. Another way to use the status change workflow is to change a patient's status to retention when a deband appointment is kept.

To change a patient's status to retention when a deband appointment is kept, go into the Editors, and find Procedures in the list on the left. Once logged in, find your deband appointment and click on the wizard icon to the right of Kept. Click on the Activity drop down and choose Change Status. In the New Status drop down, choose your retention status and click OK. In the drop down list for Kept, you will now see Change Status – Retention.



If you want Edge to prompt you to choose a status to change the patient into, follow these same steps, but in the New Status drop down, choose none. When you click OK, you will now have a workflow called Change Status – Prompt.

Stacks

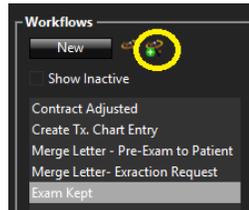
Another powerful feature in Edge is stacks. When stacks and workflows are combined, you can do things such as add a patient to a stack to verify insurance after all new exams are kept. You can also add patients to a treatment plan stack for the doctor to complete after appointments. Note that you should have the stack already set up for this

process to work.

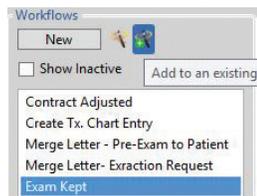
Choose your procedure in the Procedures Editor, and click on the wizard icon next to the status you want to work with. In the Activity drop down, choose New Stack Entry. You will then see a list of all of the current stacks in your list. Choose the stack you want to add these patients to and click OK. It's that easy. You now have a workflow called New Stack Entry – Stack Name to use.

Combining Workflows

You can also combine workflows to, for example, change a patient's status and merge a letter. Because this workflow is going to do more than one thing at a time, we need to go to a different screen to create it. In the Editors list on the left, scroll down to the bottom of the list and find Workflows. On this screen we can manually create workflows without the wizard, or use wizard to add to an existing workflow.



To begin, click on New. In the top of the screen, change New Workflow 1 to the name of your new workflow. When you're doing multiple activities, give the workflow a name based on how it's used. In this example I will call it Exam Kept. The easiest way to then create this workflow is to click on the wizard icon that has the green plus sign next to it. Choose your Change Status activity and select the appropriate status. When you're done, simply click on the same wizard icon with the green plus sign and set up your letter. Your workflow now has two activities. Once you click save in the top left corner, this workflow will be available to use in the Procedures Editor.



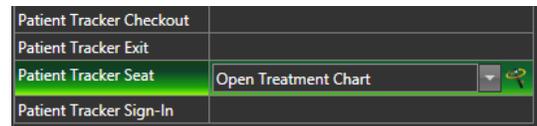
Opening a Treatment Chart when Seating a Patient

Opening a patient's treatment chart when you seat the patient is another common workflow. Please note, you will need to use the computer by the chair the patient is seated in for this workflow to function properly. To set this workflow up, you will again need to use the Workflows Editor.

In the Workflows Editor, click on New at the top and give your workflow a name. In this example, I am going to call it Open Treatment Chart. In the middle of the screen, you'll see the list of activities. Simply click and drag the Open Patient activity over to the empty Workflow Activities box to the right of it. If you drag the wrong item over, simply press delete on the keyboard to remove it.

Once Open Patient is in the middle of the screen, click on it so it displays the Activities Properties. On the right side of the screen, you will now see an option that says TabToOpen. Click on the drop down to the right of it and choose Tx. Hub. Save it and the workflow is created.

Next we need to set it up so this workflow fires every time we seat a patient. To do this, we need to go to the Triggers Editor. This is at the bottom of the Editors list to the left. In here, you will see a list of Triggers that you can run a Workflow with. The Triggers are used to fire a Workflow every time a certain event happens, such as every time you seat a patient, each time you process ANY appointment as Missed, or any time a contract is changed.



Click on the empty box to the right of Patient Tracker Seat. Click again on the drop down that just showed up, and select Open Treatment Chart. If this option isn't available, make sure you saved your workflow in the previous step. Click save. It's just that easy and it's all set up.

These are just a few examples of what you can do with the powerful workflows function. If you would like to learn more about workflows or see a video on how to set them up, watch our Visual Help video on Workflows. You can find it in Edge by going to the File menu, hovering over help, and choosing Visual Help. Once logged in, scroll down to the Webinars section and Click on Edge Workflows. [👉](#)