



ORTHO2

Creating Computerized Reminders with Auto-Events

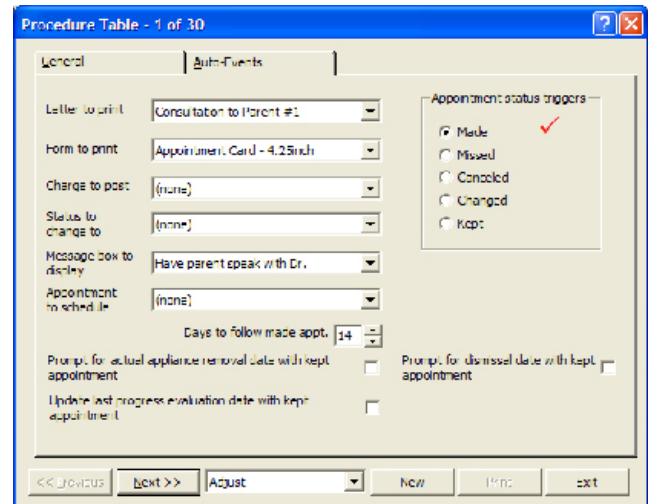
by **Natalie Beaton**

The Auto-Events feature that ties into your Procedure Codes can be very helpful in ensuring that certain events are not overlooked during busy moments. Auto-Events are simply reminders to do things so that there is consistency in your office.

Auto-Events can be set up to happen when appointments are Made, Missed, Cancelled, Changed or Kept. Selecting Procedures from the Grid Tools drop down menu accesses this feature. Once you've selected the Procedure Code for which you want to create an Auto-Event, simply select the Auto-Events tab. The left side lists the Events choices and the right side lets you choose the appointment status that you want to trigger the event.

Understanding how other offices have used each event can be helpful in setting up Auto-Events for your office:

1. LETTER TO PRINT can be used to print a New Patient letter when an exam is scheduled, to send a Missed Appt postcard when any procedure is missed, or to make sure a Deband letter is sent to the GP when a deband appointment is kept, for example.
2. FORM TO PRINT could be used to print an Appt History form and a Financial letter when a Final Treatment Review is set up or to trigger an Insurance form on the day of bonding.
3. CHARGE TO POST is an excellent way to make sure that miscellaneous charges are not overlooked. If you choose this for certain procedures (e.g. Records or Impressions) it will automatically remind the staff to post the charge.
4. STATUS TO CHANGE TO will set certain status changes for certain procedures. You may want to set this up to remind you to choose a status from the list when a New Patient Exam is kept, to change status to Will Call for Follow Up if a banding is missed, or to change a status from Comprehensive to Retention when a Deband appt is kept. Your use of this will



depend on the statuses your office uses.

5. MESSAGE BOX TO DISPLAY can be used in many ways: When Deliver Retainer is scheduled, have a reminder that asks "Is the retainer ready?" When Deliver Appliance is scheduled or kept, ask "Has the fee been paid?" If a Phase II Consult is scheduled, you may want a reminder to give the chart to the Financial Coordinator to verify remaining Insurance benefits. The best way to use this feature is to ask yourself if there are things that are being overlooked and how can you use Reminders to keep that from happening.
6. APPOINTMENT TO SCHEDULE can be used when there is a series of appointments that need to be scheduled one right after the other (e.g. seps, bands/ impressions, cement appliance). It can be set to remind the staff to make sure those appointments have been scheduled.
7. DAYS TO FOLLOW MADE APPOINTMENT allows you to designate how far apart the appointments for that

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series should be scheduled.

8. **PROMPT FOR ACTUAL APPLIANCE REMOVAL DATE** lets the staff enter the actual removal date when a deband appointment is kept. This will keep your Beyond Treatment list up to date.
9. **UPDATE LAST PROGRESS EVALUATION** would be used as a reminder that a progress report has been done. This requires a separate adjustment code that indicates a Progress Evaluation is due. This is only important to offices sending regular Progress Evaluations.
10. **PROMPT FOR DISMISSAL DATE** could be linked to your Retainer Check procedure to remind the staff to check if the patient is being dismissed. You have to weigh the degree of aggravation created when that comes up after every retainer appointment is kept.

The possible uses for Auto-Events are virtually endless. I've found that once an office begins setting up Auto-Events, the staff and Doctor will keep thinking of new ways to add to the list. Auto-Events can provide a strong system to consistently keep essential events from being overlooked. ☺

About the Author



Working exclusively with Ortho2 clients, Ms. Beaton has a practice management focus that maximizes the use of the technology specific to ViewPoint software. Ms. Beaton's extensive knowledge of both the most current practice management trends and the ViewPoint system allows her to help any office to turn ideas into day- to-day reality.

Prior to forming her own consulting business, Ms. Beaton had over eighteen years of hands-on experience in both the orthodontic and dental industry in varied roles of treatment coordinator and financial administrator.