New Patient Tracking Report

by ***Natalie Beaton***

Having a convenient way to check statistics on new patients can allow you to evaluate the effectiveness of your new patient exam and ultimately, greatly increase the conversion of those patients into treatment. As a Treatment Coordinator I want to ask, Of the new patients that I saw last month, how many were not ready for treatment and were placed on recall, how many were ready for orthodontic treatment, what type of treatment and fees were discussed, how many scheduled to begin orthodontic care, and how many will call back? Ortho2 now has a custom report that allows easy tracking of all this information.

This report is an adaptation of the Kept Procedures Report. It lists patients seen for exams, their current status, and the fee that was proposed at the new patient exam. (This report can be used whether you decide to track the proposed fee or not. If you have not typed a fee on the Responsible Party tab, that column will remain blank.) The report and instructions for adding it to your system are available from www.ortho2.com/Support/ReportRepository.

To include a proposed fee on the report you will need to define the Responsible Party User Defined field as Fee. Do this from the ViewPoint Main Menu: Go to System Tables and click on System. Click on User Defined Fields, highlight the field next to resparty userdeftext1and type the word Fee. Then, when a fee is discussed with a new patient, you would simply go to the Responsible Party tab of their Patient Folder and enter in this field the amount that was discussed.

Then to run the report, from Main Menu: Click on Reports, Appointment (or the folder you saved this report to, if different), and double-click the New Patient Tracking Report. Select the procedures that are used in your office for new patient exams. You may also want to include Pre-Treatment Recall, Recall Ready, Pre Phase Two Consults or any procedures in which treatment may have been proposed. Finally, select the appropriate date range and print the report.

The information gathered on this one report will help you evaluate your new patient treatment conversion, including potential income that has been proposed but not scheduled, and alert you when a more consistent follow up system for all pending treatment might be helpful. This report will also clearly show when improvements to your new patient process start resulting in increased new patient conversions.

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.

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