



# Professionals

It's the little things you do that show how much you care

by **Natalie Beaton**

**S**o you have the patient in the chair and you need to refer them for an extraction. Don't you just wish you knew whom their family dentist prefers to use as an oral surgeon or if they like to extract bicuspids themselves?

An underused feature of ViewPoint allows you to do just that! When set up correctly, this feature allows you to quickly determine who the specialist is you should be referring that particular patient to, based on their dentist's preferences. Having this information at the touch of a button really shows off your office as efficient and informed.

The very first step in this process might be best accomplished by sending a survey to your referring family dentists to establish which specialist they would like you to use for their patients. At the same time you can verify the information you have on their practice as well. The following is an example of a possible survey and cover letter you could use.

```
{ MERGEFIELD posting_date }
{ MERGEFIELD dentist_full_name }
{ MERGEFIELD dentist_address_1 }
{ IF { MERGEFIELD dentist_address_2 } <> "" * { MERGEFIELD dentist_address_2 }
* { MERGEFIELD dentist_city } { MERGEFIELD dentist_state } { MERGEFIELD dentist_zip } }
```

Dear { MERGEFIELD dentist\_greeting },

I continue to strive to improve communication with the family dentists who so generously refer their patients to our practice for their orthodontic care. Although filling out surveys is probably nobody's favorite thing to do, the information will be used to provide outstanding care to our mutual patients. I sincerely hope you will take the time to fill out and return the enclosed survey. Your participation is greatly appreciated.

The general information about your practice's hours and days worked helps me know when it is easiest to reach you. I continue to develop ways to support referring patients back to you for their oral hygiene needs, and knowing the names of your current hygiene staff will help in that process. Knowing your preferences for extractions and referrals to specialists helps me make the referral process quick and concise for your patients.

Advancing technology continues to increase the number of ways I can transmit and receive patient information. I would like to make sure that the information that I am sending throughout patient care is sent in the format that best meets the needs of your practice.

I appreciate the correspondences and information you share and are happy to receive them in any format. Please feel free to continue to mail traditional hard copies of correspondences and radiographs if that is your preference. If you would rather e-mail correspondences and radiographs, I can file them electronically.

As always, I am delighted to have the opportunity to work with you and to discuss the role orthodontics might play in the overall dental health of your patients. As a convenience to you, our website can now be used by you to electronically send your patient referral information and radiographs. If you are interested in this option please visit our website at [www.smithandjones.com](http://www.smithandjones.com) and click on link for Referring Dentists.

Sincerely,

```
{ MERGEFIELD doctor_name }
```

**General Practice Information: { MERGEFIELD dentist\_full\_name }**

Days Open	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Hours						
Lunch Time						

**Staff Information**

Name and Position	Name and Position

**Referral Information**

Extract Primary	In Office	Refer To:
Extract Bicuspid		
Extract Molars		
Extract Third Molars		
Preferred Oral Surgeon (if any)		
Preferred Periodontist (if any)		
Preferred Prosthodontist (if any)		
Preferred Pedodontist (if any)		

**Correspondence preferences from Smith and Jones Orthodontics to your practice:**  
PLEASE CHECK ALL THAT APPLY

Practice E-mail Address: \_\_\_\_\_

	E-mail	Mail Hard Copy
Letters	<input type="checkbox"/>	<input type="checkbox"/>
Extraction Requests	<input type="checkbox"/>	<input type="checkbox"/>
Digital Panoramic Radiograph	<input type="checkbox"/>	<input type="checkbox"/>
Digital Photographs	<input type="checkbox"/>	<input type="checkbox"/>

When the responses come in, be sure to enter all the information into ViewPoint using the instructions following the break.

## Set Up Professional Types

Go to System Tables > System > Professional Type. Types to consider adding: Oral Surgeon, Periodontist, Pedodontist, Endodontist, Prosthodontist. For customized

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fields consider adding any of the following: Fax, Children, Hobbies, Days Open, Office Hours, Office Manager, Notes.

Once you have established the professional types, you are ready to add the individual professional providers of each type. Using the names listed on the surveys you have received you may want to send surveys to the specialist to get their office hours and days worked.

### Add Individual Professionals

Go to System Tables > Patient > Professional. Choose the appropriate professional type (e.g., Oral Surgeon). Scroll down the list and look to see if that provider has already been added. If not, Click New. Enter all the information you have available for that provider.

### Link Specialists to Dentists

Finally, it's time to link the preferred professionals to each individual family dentist! This information will prove invaluable and is well worth the initial setup time.

Go to System Table > Patient > Dentist. Click View Professional List. Click Add, and choose from list (or click New to add a new specialist). Once you have added all the various professionals that each particular family dentist prefers to refer to, you are all set! Now you can quickly look this information up by going into a patient's folder. Click the "G" next to Dentist, and click Professional List to have all the information that you need.

### Set Up Dentist User Defined Fields

In case you want to use any of the other great information that you got back on the surveys, you can simply set up your dentist user defined fields to reflect the information. Some ideas would include: Fax, Children, Days Worked, Office Hours, Preferred Communication (e.g., e-mail, snail mail, phone), Office Manager. You can set up user defined fields by going to System Tables > System > User Defined Fields. Type your choices in the right hand column.

This system is a wonderful thing to have in place and really makes the whole referral process much easier for both you and your patients. Instead of hesitantly having to contact the family dentist, you have all the information you need at a glance. Make setting this up a New Year's resolution! ☺

## About the Author

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Natalie Beaton has over eighteen years hands-on experience as a Treatment Coordinator and Financial Administrator. At the 2011 Users Group Meeting she presented two courses on using ViewPoint to track patients and critical data.