So 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:

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

**Reprinted from**
The Newsletter for Members and Friends of Ortho2
April 2011 - Volume 29 Issue 1
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
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.

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.

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