

Leveraging the Downturn to Prepare for the Upturn



As practices are facing the most profound and extreme business challenges imaginable, we want to share our expertise and “best practice” ideas as well as those we are witnessing from clients and colleagues. While some practices have a small team on site, others are mandated to be closed. Many practices have specific staff who can dial in to the office from home or via internet access the cloud management software. We’ll offer some proactive suggestions that will be posted weekly. We feel these ideas will allow you to be proactive and prepared when the time arrives to start recovery.

We will create instructions for these ideas by practice management software system:

Cloud 9

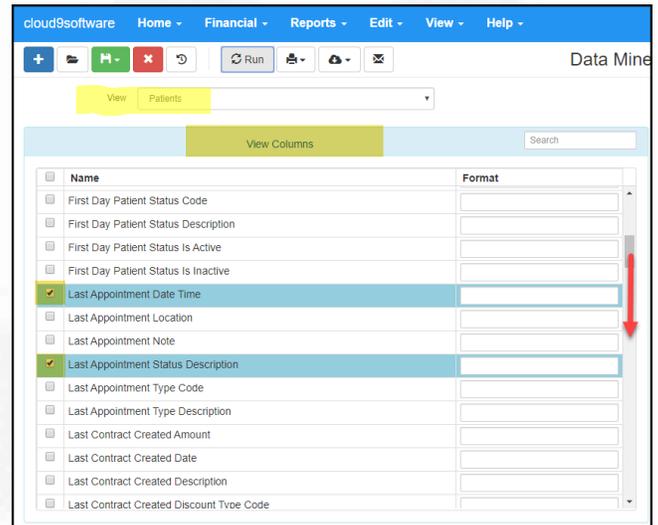
Proactive Recall Management

Identify **Observation & Between Phases Status** that are 12 years of age and older, as well as the patients that will be turning 12 years old in 2020. These are the potential Starts that will front-load our recovery!

1. Reports/Data Miner/View = Patients

Under the **View Columns** on the left-hand side – Select the following attributes

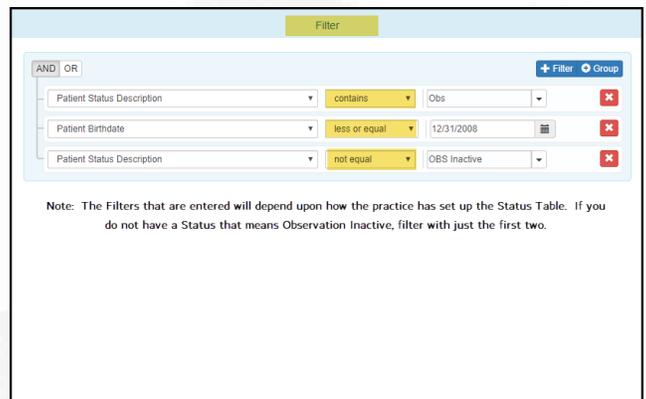
- Last Appointment Date Time
- Last Appointment Status Description
- Next Appointment Date Time
- Next Appointment Type Description
- Patient Last Name First Name
- Patient Recall Appointment Type
- Patient Recall Date
- Patient Status Description
- If working by location – add Patient Location



2. Filter – On the right-hand side

Select the following Filters

- Patient Status Description: Equals and select your Observation Status
- Patient Birthdate – Select a birthdate that would pull any Observation patient that is turning 12 years old in 2020. **(Less or equal: 12/31/2008)**
- Select **Run**



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- Once the report has **Run**, sort the data by clicking on **Next Appointment Date Time**. Clicking **Next Appointment Date Time** will pull all the patients that **DO NOT HAVE A FUTURE appointment** to the top.
 - Review their Recall Date – Note if the display reads 12/31/1899 – this patient does not have a future Recall scheduled in Cloud 9
 - Review the list and determine who you want to contact to schedule an OBS Check or OBS Ready appointment sooner than later
 - Review the Observation patients that have a future appointment scheduled to see if you will want to move the date sooner than later

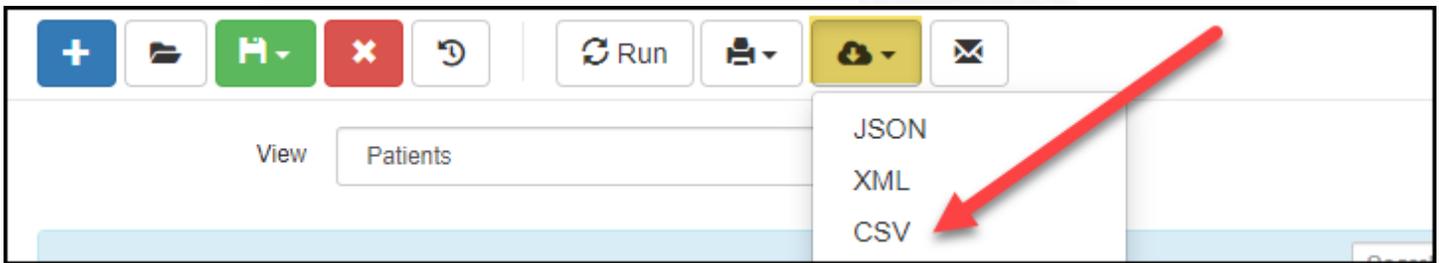
Showing 1 to 28 of 28 rows

Click on Next Appt Date Time to sort data

Note if Recall displays as 12/31/1899 - Patient does not have a Recall in Cloud9

Last Appointment Date Time	Last Appointment Status Description	Next Appointment Date Time	Next Appointment Type Description	Patient Last Name First Name	Patient Recall Appointment Type	Patient Recall Date
06/11/2019 04:00:00 pm	Completed	-				12/31/1899 12:00:00 ar

- Exporting Cloud 9 reports into a csv file that will allow sorting as desired, formatting, as well as an efficient work-flow approach.



- Once exported, sort the columns as desired to work through the data efficiently.
 - Note the expired Recall dates as well as the patients that do not have a future appointment
 - Time to contact and schedule
 - If you want to keep the sorted data file -> File/Save As and change it to an **Excel format**. If you save without changing into an Excel format, the sorting will not save.

Last Appointment Date Time	Last Appointment Status Description	Next Appointment Date Time	Next Appointment Type Description	Patient Last Name First Name	Patient Recall Appointment Type	Patient Recall Date	Patient Status Description
5/28/2019 15:20	Completed	-			OBS2-Back to OBS2	11/1/2019 0:00	OBS 2 Ready
4/18/2019 16:25	Completed	-			OBS3 Check (Post Phase 1 Ck)	11/1/2019 0:00	OBS 2 Ready
6/17/2019 11:15	Completed	-			OBS1 Check Phase 1	1/1/2020 0:00	OBS 2 Ready
8/2/2019 8:05	Completed	-			OBS2-Back to OBS2	1/1/2020 0:00	OBS 2 Ready
4/10/2019 10:35	Completed	-			OBS3 Check (Post Phase 1 Ck)	2/1/2020 0:00	OBS 4 Ready
11/18/2019 14:50	Completed	-			OBS3 Check (Post Phase 1 Ck)	5/1/2020 0:00	OBS 4 Ready
2/11/2020 16:45	Completed	-			OBS3 Check (Post Phase 1 Ck)	5/1/2020 0:00	OBS 2 Ready
10/28/2019 15:20	Completed	-			OBS2 Ready	6/1/2020 0:00	OBS 2 Ready
6/11/2019 16:00	Completed	-			-	12/31/1899 12:00:00 am	OBS 3 Cancel/No Show
2/12/2019 14:50	Completed	-			-	12/31/1899 12:00:00 am	OBS Cancel/No Show
6/11/2019 11:35	Completed	-			-	12/31/1899 12:00:00 am	OBS Cancel/No Show
8/14/2019 11:35	Completed	-			OBS3 Check (Post Phase 1 Ck)	12/31/1899 12:00:00 am	OBS Cancel/No Show
8/23/2019 10:50	Completed	-			-	12/31/1899 12:00:00 am	OBS Cancel/No Show
7/17/2019 16:05	Completed	-			-	12/31/1899 12:00:00 am	OBS 3 Cancel/No Show
4/17/2019 15:10	Completed	3/25/2020 8:15	OBS2 Ready		OBS2 Ready	10/1/2019 0:00	OBS 2 Ready
11/1/2019 7:15	Completed	4/15/2020 14:50	OBS2 Ready		OBS2 Ready	11/4/2019 0:00	OBS 2 Ready
2/26/2020 15:20	Completed	4/21/2020 8:00	AW-Simple 1/2		-	12/31/1899 12:00:00 am	OBS Cancel/No Show
3/3/2020 14:45	Completed	4/30/2020 14:00	AW-Retie		-	12/31/1899 12:00:00 am	OBS 4 Ready
11/25/2019 14:15	Completed	5/5/2020 15:55	OBS2 Ready		-	12/31/1899 12:00:00 am	OBS 2 Ready
5/21/2019 14:00	Completed	5/6/2020 10:35	OBS2 Ready		OBS1 Check Phase 1	1/1/2020 0:00	OBS 2 Ready
12/13/2019 7:05	Completed	5/21/2020 7:45	OBS4 Ready		-	12/31/1899 12:00:00 am	OBS 4 Ready
12/17/2019 15:30	Completed	5/27/2020 14:50	OBS2-Back to OBS2		-	12/31/1899 12:00:00 am	OBS 2 Ready
1/21/2020 14:00	Completed	6/22/2020 15:25	OBS2 Ready		OBS3 Check (Post Phase 1 Ck)	2/1/2020 0:00	OBS 2 Ready
1/13/2020 15:55	Completed	7/7/2020 10:35	OBS4 Ready		-	12/31/1899 12:00:00 am	OBS 4 Ready
1/16/2020 15:40	Completed	7/16/2020 15:00	OBS4 Ready		-	12/31/1899 12:00:00 am	OBS 4 Ready
1/14/2020 15:55	Completed	7/21/2020 15:55	OBS4 Ready		OBS1 Check Phase 1	12/31/1899 12:00:00 am	OBS 2 Ready
2/5/2020 9:15	Completed	8/3/2020 11:35	OBS3 Check (Post Phase 1 Ck)		OBS3 Check (Post Phase 1 Ck)	11/1/2019 0:00	OBS 2 Ready
2/17/2020 11:35	Completed	8/4/2020 14:50	OBS4 Ready		-	12/31/1899 12:00:00 am	OBS 4 Ready

If you run into difficulties, please feel free to contact sue@impact360.com