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:

Dolphin

Proactive Recall Management

Identify Observation & Between Phases Status that are 12 years of age and will be turning 12 years old in 2020. These are the potential Starts that will front-load practice recovery!

- Select Patient Under the Field Categories box
- Then under Available Fields Select the highlighted attributes

- Return to the Field Category box and select Patient Current Status
- Under the Available fields select the highlighted attributes
Leveraging the Downturn to Prepare for the Upturn

- Continue to return to the Field Category box and follow the pictures to acquire the needed attributes.
Leveraging the Downturn to Prepare for the Upturn

Begin to Filter the Report

- Once all fields are selected, select OK.
- Now let’s sort the report
  - Right mouse click on the title – **Patients’ Age in Years**
  - Select **Number Filters**…
  - Select **Greater Than and enter the desired age** – example is 11, click OK

- Right mouse click on the title – **Recall Date**
- Select- Sort **Oldest to Newest** – this will put the patients without a Dolphin Recall at the top
- Review the list and begin to contact patients that do not have a Recall or have an expired Recall