Leveraging the Downtime for a Strong Recovery

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:

**topsOrtho**

**Proactive Recall Management**

**Identify potential starts in Observation & Between Phases Status**

**STEP1:** FROM THE MENU BAR SELECT MATRIX & D7 PATIENT CARE TRACKING

**STEP 2:** Update the task menu to review current patients by the status of MONITOR/OBSERVATION...

**STEP 3:** Rearrange the columns to Patient, Age, Tx Status, Months in Status, Tx Phase, Tx Disposition, Next Expected Appt and Next Scheduled Appt. The following Tx Statuses will be displayed:

- Development Monitored-Not Ready for Initial Tx
- Development Monitored-with Retention
- Development Monitored-without Retention

**ACTION:** If New Patient Calls are slow when the recovery begins, these 12-14 year olds could be the patients who fill many of the exam slots and become STARTS. Contact and schedule the appropriately due patients.