

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.

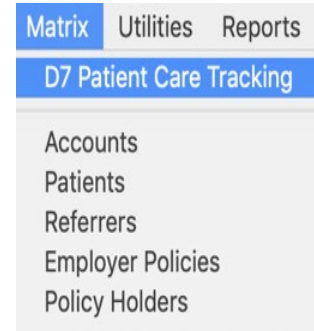
We will create instructions for these ideas by practice management software system:

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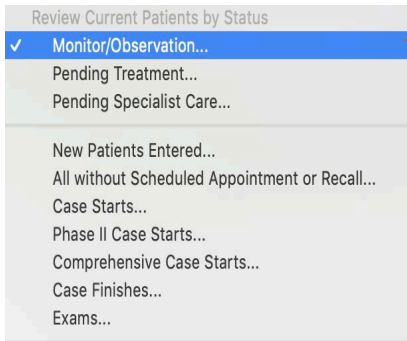
Proactive Recall Management

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

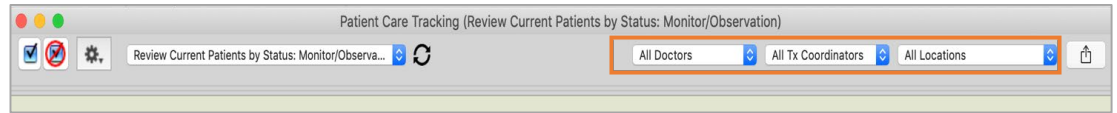
STEP 1: FROM THE MENU BAR SELECT MATRIX & D7 PATIENT CARE TRACKING



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



Confirm that your Patient Care Tracking is set to “All Doctors”, “All Tx Coordinators”, and “All Locations”



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**

Age	Tx Status	Mos in Stat	Tx Phase	Tx Disposition	Next Expected Appt	Next Scheduled Appt	Dental Classification	Tx Visits	Total Visits	Value per Tx VI
16-1	Development Monit...	10	Monitor Development	Schedule Recall Ex...	NP05 Re-Tx	[OB02 Observation Between				
15-11	Development Monit...	2	Monitor Development	Begin Active Treatm...	ST02 Start Bond	[ST02 Start Bond 2 Arches]	Class I Adolescent...	1	1	

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.