

Use Status Codes to Increase Production and Manage Patient Flow

- Identify and convert potential starts
- Manage treatment and retention times
- Create and maintain a realistic schedule
- Identify concerns before they become problems
- Designate staff job tasks according to status

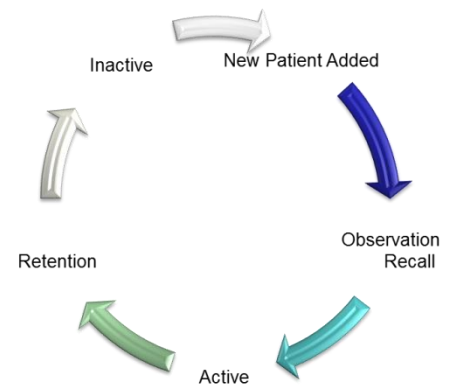
About the VBR Status Flow Management Process

Using status to track and manage patient flow is the foundation of Vickie’s proprietary benchmarking management system for orthodontic practices. Assign the correct statuses throughout the treatment process to:

- Simplify patient management processes.
- Increase patient starts, on-time completion, scheduling efficiency and collections.
- Track practice performance in relation to benchmarked goals.

How Statuses are Organized

1. Patient statuses are used to track each patient’s progress leading up to treatment, during treatment, and after treatment.
2. Statuses are grouped according to type and phase of treatment beginning with the initial examination outcome.



VBR Patient Status Definitions

Active Aligner
Active Comprehensive
Active Interceptive
Active Limited
Active Phase 1
Active Phase 2
Inactive
New Patient Added
Observation Ready
Observation Recall
Pending Phase 2 Ready
Pending Phase 2 Recall
Retention
Scheduled Case Presentation
Scheduled Records
Scheduled Start
Waiting Approval
Will Call Back

18 codes

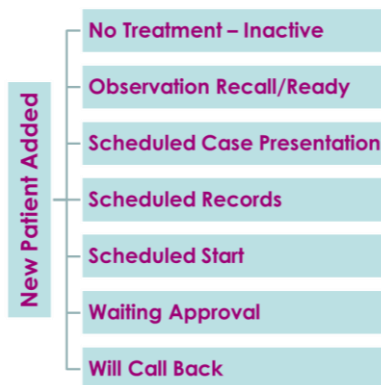
DM New Patient Added Status

1. When a new patient is entered into DM the “New Patient Added” status is automatically assigned.
2. All new patients must have an appointment.

Patient	Current Status	Patient's Age	Entry Date	Status Start Date	Last Appt	Last Appt Code	LAS	Next Appt	Next Appt Code
ims, Suzie	New Patient Added	42y, 9m	2/26/20	2/26/2020				3/16/2020	EXAM
tin, Tom	New Patient Added	10y, 4m	2/26/20	2/26/2020				3/16/2020	EXAM
ker, Missy	New Patient Added	42y, 4m	2/17/20	2/17/2019	3/4/2019	NPA	C	3/16/2020	EXAM
gos, Tanisha	New Patient Added	18y, 5m	3/31/20	3/31/2018	2/25/201	NPC	X		

VBR Initial Exam Outcome Statuses

1. Each new patient exam has several possible outcomes.
2. Assign each new patient a status based on exam outcome.



VBR Track Practice Performance

1. Track the results of ALL initial exams on a monthly basis.
2. Identify production related concerns before they become problems.
3. Use exam summary data to build accurate schedule.

Exam-No Treatment	3%	1
Exam-Observation Ready	5%	2
Exam-Observation Recall	38%	15
Exam-Scheduled Case Presentation	3%	1
Exam-Scheduled Records	25%	10
Exam-Scheduled Start	8%	3
Exam-Waiting Approval	5%	2
Exam-Will Call Back	15%	6
		40

Example from VBR Benchmark Worksheet

VBR Potential Starts Statuses

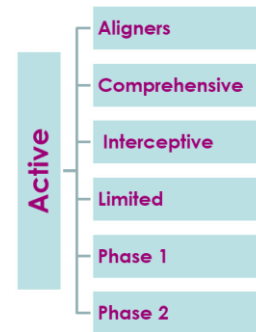
New Patient Added
Observation Ready
Observation Recall
Pending Phase 2 Ready
Pending Phase 2 Recall (Phase 1 Retention)
Scheduled Case Presentation
Scheduled Records
Scheduled Start
Waiting Approval
Will Call Back
Total Potential Starts

- These statuses are the source of new patient starts.
- Achieve production goals by scheduling the necessary number of start appointments.
- TC to follow up with these patients and schedule appointments on a daily basis.

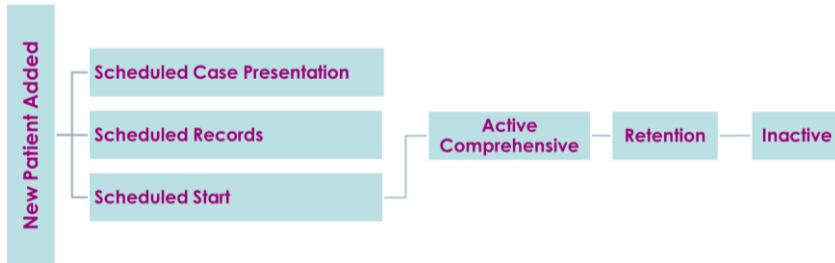
Example from VBR Benchmark Worksheet

VBR Active Statuses

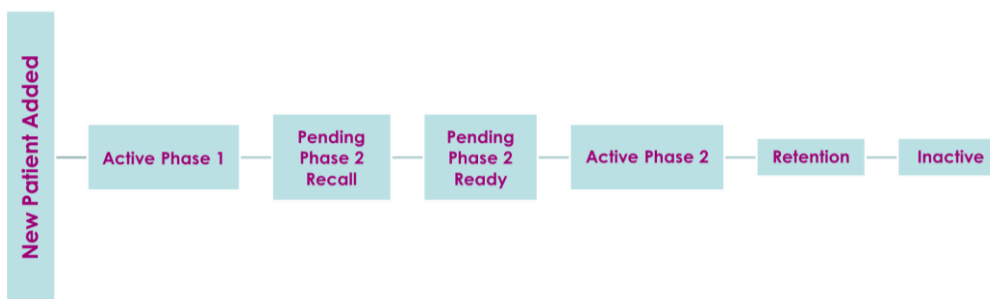
1. All Active Patients must have an appointment or call to schedule.
2. Identify patients who cancel appointments, arrive late, no-show.
3. Do not let appointment noncompliance extend treatment time.



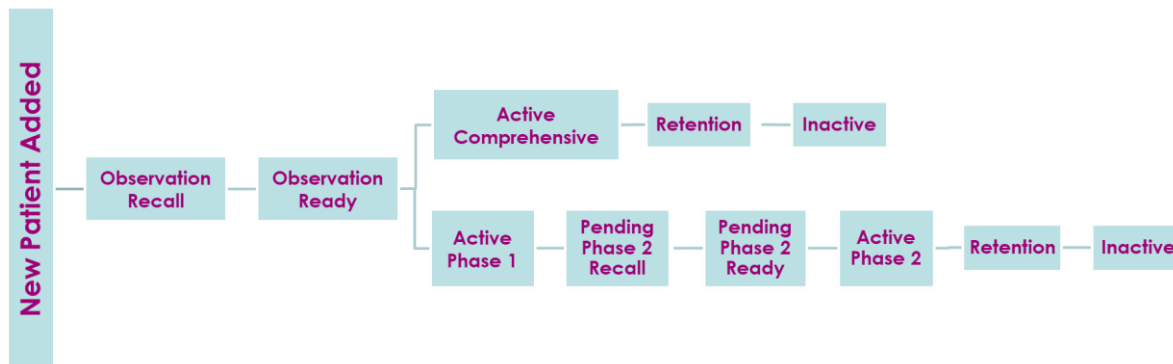
VBR Active Comprehensive Statuses



VBR Active Phase 1 to Active Phase 2 Statuses

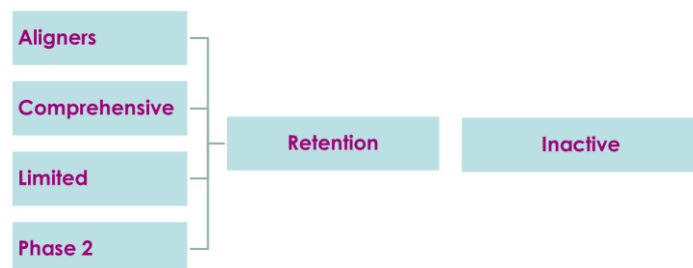


VBR Observation Recall Statuses



VBR Retention Statuses

1. A consistent system for following retention patients decreases demand on the schedule.
2. Identify the duration of the retention phase of treatment, and the number and schedule of appointments included in the treatment fee.

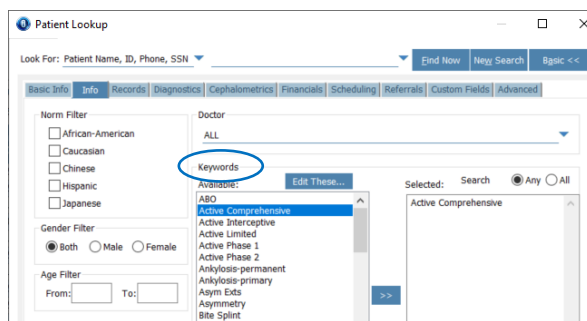


Patient Lookup > Info

Use search criteria **Keywords** for looking up groups of patients with common characteristics.

Keywords Tip

- ABO
- Oral Hygiene
- Re-treat
- Surgery
- Implants
- Use predefine statuses (non-DM)
 - Active Comprehensive
 - Active Interceptive
 - Active Limited
 - Active Phase 1
 - Active Phase 2
- Use predefine notes
 - WA Caries
 - WA Extractions
 - WA Insurance
 - WA Perio
 - WCB Consult with others
 - WCB Financial
 - WCB Second opinion

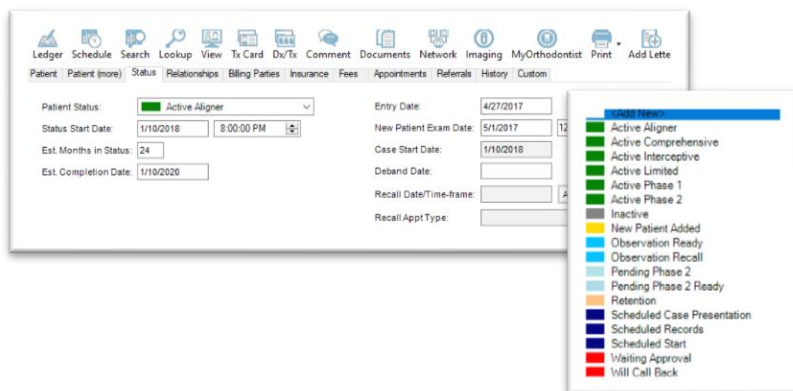


Note: A keyword can be attached to a single image. Right-click > properties > keywords.

DM Correct Statuses of Existing Patients

Edit a Patient – Status Tab

1. Change the current Patient Status using the drop down.
2. Check accuracy of Est. Months in Status (Treatment Time).
3. Enter the correct Status Start Date.



VBR statuses in DM

Edit a Patient – History Tab

4. Delete the inaccurate status transaction(s).

