



ORTHO2

An Easier Way to Clean Up Phase and Status

by **Natalie Beaton**

Once again, Tricia Rose (Report Wizard Extraordinaire) has created a report to simplify one of the important but tedious aspects of keeping our records accurate. There is now a Patient Name, Status & Phase List which you can sub-group for your active patients. To download this new report, go to www.orthoii.com > Support > Report Repository. Click the plus to the right of Patient in order to see the report name and description. Click Download, and if you need additional help please call Software Support at 800 346-4504.

Prior to running a report of your active patients you will want to consider what Phases and Statuses you would like to be using. For some ideas of Phases and Statuses being used by other offices and suggestions of how to tackle the job of correcting your existing patient list, consider reading my article in Consultant's Corner. Although it takes some effort initially to clean the list up, it is certainly worth the effort. So many reports and statistics depend on both Phase and Status being accurate that it is well worth your time and easily maintained once it is corrected. ☺

About the Author



Natalie Ann Beaton is a Practice Management Consultant for ViewPoint offices. She focuses on developing consistency and making maximum use of available technology. She can be reached at joyfulchange@comcast.net. Other articles from Ms. Beaton can be found in the Practice Resources section of www.ortho2.com.

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