



ORTHO2

Workflows in Edge

Part of an ongoing series spotlighting significant features

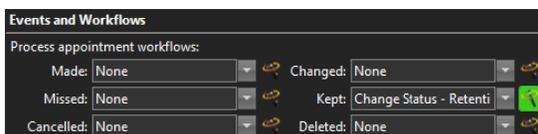
by **Derek Dohrman**

Workflows are a way to automate your system in Edge. You can change a patient status, merge letters, add patients to stacks, and even open the patient's treatment chart when you seat a patient. Most workflows are procedure based, meaning something is happening to the patient's appointment. You can also create workflows based off status changes and other triggers – the possibilities are almost endless.

Status Changes

The most common workflows offices use are status changes. You can change the status to retention on a kept debond appointment, or even display a prompt to the front desk to choose a status when they process your new patient exam as kept. Status workflows are often used to clean up statuses. For example, when a records appointment is made, you know that the patient should be in the records status, and that change happens automatically in the background.

To create a status change workflow, go into the Editors, and find Procedures in the list on the left. Once logged in, find your debond appointment and click on the wizard icon to the right of Kept. Click on the Activity dropdown and choose Change Status. In the New Status dropdown, choose your retention status and click OK. In the dropdown list for Kept, and all other types, you will now see Change Status – Retention.



If you want Edge to prompt you to choose a status to change the patient into, follow these same steps, but in the New Status dropdown, choose none. When you click OK, you will now have a workflow called Change Status – Prompt.

Merging Letters

Merging a letter is the next most common workflow. In the Editors select Procedures from



the list on the left. Once logged in, choose the procedure you want to work with. Select the wizard icon next to the appointment status you want to work with. In the Activity dropdown, choose Merge Letter. This will then give you additional options to pick the letter, select your merge type, include an envelope, and if you want to send it to the queue. Once you click OK, when you click on the dropdown next to status you are working with, you will see your new workflow called Merge Letter – Letter Name. Select it, and you are done.

Stacks

If you use Stacks in Edge, you can automate the process of sending a patient to a stack using workflows. Let's say that every time you process a records appointment, you want to send the patient to a stack for insurance verification. As long as the stack name already exists, this is easy to set up. Choose your procedure in the Procedures Editor, and click on the wizard icon next to the status you want to work with. In the Activity dropdown, choose New Stack Entry. You will then see a list of all of the current stacks in your list. Choose the stack you want to add these patients to and click OK. It's that easy. You now have a workflow called New Stack Entry – Stack Name to use.

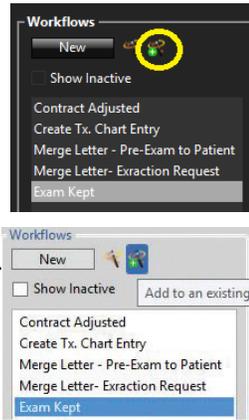
You can also combine workflows to, for example, change a patient's status and merge a letter. Because this workflow is going to do more than one thing at a time, we need to go to a different screen to create it. In the Editors list on the left, scroll down to the bottom of the list and find

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Workflows. On this screen we can manually create workflows without the wizard, or use wizard to add to an existing workflow.

To begin, click on New. In the top of the screen, change New Workflow 1 to the name of your new workflow. When you're doing multiple activities, give the workflow a name based on how it's used. call it Exam Kept. The easiest way to then create this workflow is to click on the wizard icon that has the green plus sign next to it. Choose your Change Status activity and select the appropriate status. When you're done, simply click on the same wizard icon with the green plus sign and set up your letter. Your workflow now has two activities. Once you click save in the top left corner, this workflow will be available to use in the Procedures Editor.



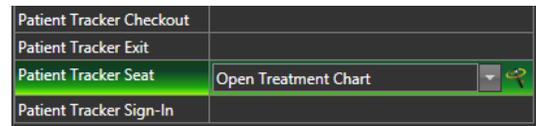
Opening a Treatment Chart when Seating a Patient

Opening a patient's treatment chart when you seat the patient is another common workflow. Please note, you will need to use the computer by the chair the patient is seated in for this workflow to function properly. To set this workflow up, you will again need to use the Workflows Editor.

In the Workflows Editor, click on New at the top and give your workflow a name. In this example, I am going to call it Open Treatment Chart. In the middle of the screen, you'll see the list of activities. Simply click and drag the Open Patient activity over to the empty Workflow Activities box to the right of it. If you drag the wrong item over, simply press delete on the keyboard to remove it.

Once Open Patient is in the middle of the screen, click on it so it displays the Activities Properties. On the right side of the screen, you will now see an option that says TabToOpen. Click on the dropdown to the right of it and choose Tx. Hub. Save it and the workflow is created.

Next we need to set it up so this workflow fires every time we seat a patient. To do this, we need to go to the Triggers Editor. This is at the bottom of the Editors list to the left. In here, you will see a list of Triggers that you can run a Workflow with. The Triggers are used to fire a Workflow every time a certain event happens, such as every time you seat a patient, each time you process ANY appointment as Missed, or any time a contract is changed.



Click on the empty box to the right of Patient Tracker Seat. Click again on the dropdown that just showed up, and select Open Treatment Chart. If this option isn't available, make sure you saved your workflow in the previous step. Click save. It's just that easy and it's all set up.

These are just a few examples of what you can do with the powerful workflows function. If you would like to learn more about workflows or see a video on how to set them up, watch our Visual Help video on Workflows. You can find it in Edge by going to the File menu, hovering over help, and choosing Visual Help. Once logged in, scroll down to the Webinars section and Click on Edge Workflows. ◉

About the Author



Derek Dohrman is an Advanced Tech and Trainer with Ortho2. In his free time, Derek enjoys spending time with his wife and two dogs, kayaking, and sampling craft beers that he has not tried before.