



## Case Management Binder

### How to run the reports

The purpose of this binder is to have a centralized location to manage your cases; additionally it will house the reports that are to be run to ensure that patients do not go without care, or proper follow up.

Please schedule a weekly meeting with the doctor to review the appropriate case management reports.

The reports below are to be printed and kept in the binder in the proper month.

#### 1. Monthly Calendar; Printed from the “OnSchedule” Module

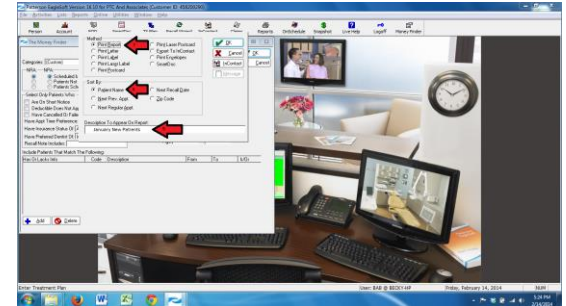
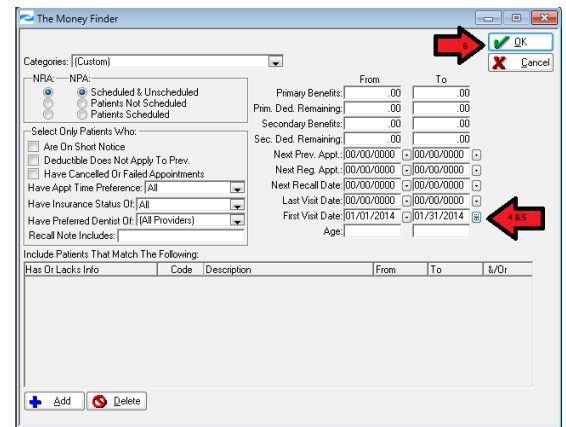
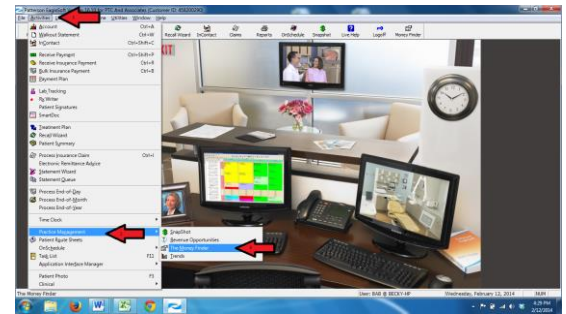
1. Click on the “View” Menu
2. Select “Month At A Glance”
3. Click “File”
4. Click “Print”
5. Under “Print Orientation” select “Landscape”
6. Click “OK”
7. This Calendar will show you;
  1. How many appointments you have scheduled on any given day of the month
  2. How much Production you have on the schedule
  3. The goal for that day
  4. How much you have scheduled VS the Goal
  5. The actual production for that day (Once the day has passed)
  6. How much produced VS the goal
  7. The scheduled total for the month
  8. The monthly goal
  9. The scheduled % compared to the goal
  10. Total New patients on the schedule
  11. Total number of appointments on the schedule
8. Things to do with the calendar
  1. Note the days that are light on appointments so that you know where the production could be scheduled
  2. Compare how you are going into the month compared to the goal that was set up
  3. Make notes on the days for yourself, EX. “Call Mary Jones, to Schedule” or “This day is very light and we have 2 Drs.”



Day	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
1	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
2	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
3	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
4	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
5	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
6	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
7	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
8	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
9	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
10	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
11	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
12	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
13	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
14	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
15	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
16	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
17	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
18	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
19	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
20	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
21	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
22	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
23	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
24	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
25	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
26	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
27	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
28	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
29	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
30	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts
31	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts	0 Appnts

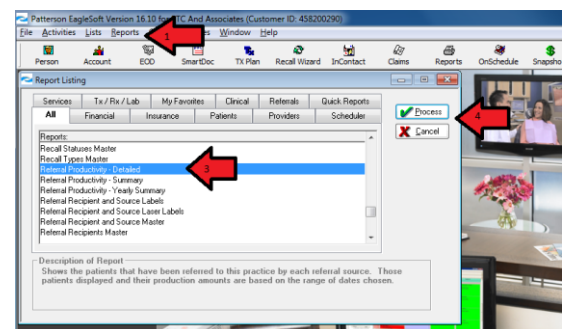
## 2. New Patient report; printed from “Money Finder”

1. Click on the “**Activities**” Menu from the top menu bar
2. Click on the “**Practice Management**” tab from the “Activities menu
3. Click on the “**Money Finder**”
4. Under the “**First Visit Date**” enter the (First day) Ex; 01/01/2014 of the previous month under the “**From**” column.
5. Under the “**First Visit Date**” enter the (Last day) Ex; 01/31/2014 of the previous month under the “**To**” column.
6. Click “**OK**”
7. Under “**Method**” make sure that “**Print Report**” is selected.
8. Under “**Sort by:**” make sure that “**Patient name**” is selected.
9. Under “**Description To Appear On Report**” Enter “**January New Patients**”
10. This report will show you;
  1. The name of the patient
  2. The Home and Work phone number
  3. Next Regular appointment
  4. Next Preventative appointment
  5. Next recall date
  6. Primary / Secondary Insurance
  7. Remaining Deductible
  8. Benefits remaining
11. Things to look for in this report
  1. How many patients had their first visit in the selected month.
  2. If we got all of their phone numbers.
  3. If they left with an appointment to receive treatment.
  4. If they left with a recall appointment set up
  5. If they have insurance benefits remaining that they could use.



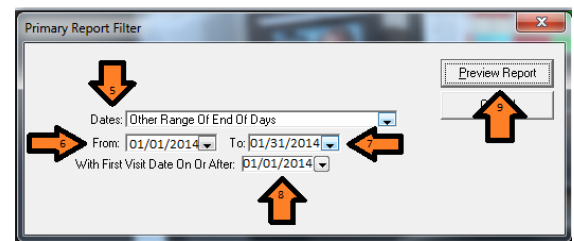
## 3. Referral productivity Detailed Report

1. Click on the “**Reports**” menu from the top menu bar
2. Click on “**All Reports**”
3. Click on the “**Referral Productivity - Detailed**” report
  1. Note if you have not already done so; to make it easier to run the next time make sure that you put the “**Referral Productivity - Detailed**” report into “**My Favorites**”
    1. From the “**Report listing**” menu select the “**Referral Productivity - Detailed**” report
    2. Right Click on the report
    3. Click on “**Add this report to my Favorites**”
    4. This report will be accessible from a central location (**My Favorites**) along with all the other reports that can be run from the “**Report Listing**” menu.
4. Click on “**Process**”



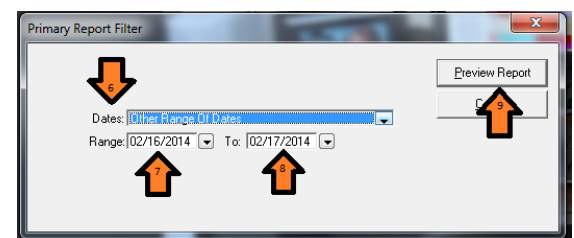
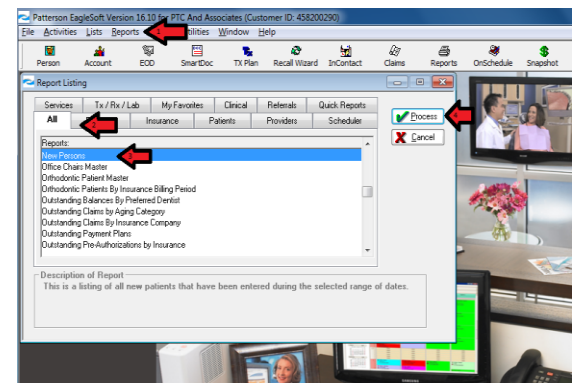


5. Under the **"Dates"** select **"Other Range Of End of Days"**
6. Under the **"From:"** drop down box, select the first day of the first day of the previous month.
7. Under the **"To"** drop down box, select the last day of the previous month.
8. Under the **"With First Visit Date ON or After"** enter the first day of the previous month.
9. Click on **"Preview Report"**
10. When the **"Report Preview"** sheet comes up click **"Print"**
11. This report will show you:
  1. Where the new patient came from **"Referral Source"**
  2. The Patient name
  3. What day their First Visit was
  4. The production for the range that you ran the report for that patient
  5. The production for the current month that you are in for that patient
  6. The production for the Year for that patient
12. Things to look for on this report:
  1. Make sure that all patients have a **"Referral Source"**
  2. This would be accomplished by checking this report and making sure that all off the patients that appeared in the **"Money finder"** report that we ran are on this report.
  3. If there are Patients on the "Money Finder Report that we ran labeled **"January New Patients"** that do not appear on this report, that means that they do not have a referral source entered.
  4. You will need to look up the patient, and enter the **"Referral Source"** that they came from.



#### 4. New Person Report (To be run on a weekly basis)

1. Click on the **"Reports"** menu from the top menu bar
2. Click on **"All Reports"**
3. Click on the **"New Persons"** report
  1. Note if you have not already done so; to make it easier to run the next time make sure that you put the **"New Persons"** report into **"My Favorites"**
    1. From the **"Report listing"** menu select the **"New Persons"** report
    2. Right Click on the report
    3. Click on **"Add this report to my Favorites"**
    4. This report will be accessible from a central location (**My Favorites**) along with all the other reports that can be run from the **"Report Listing"** menu.
4. Click on **"Process"**
5. The **"Primary Report Filter"** box will appear
6. Under the **"Dates"** select **"Other Range Of End of Days"**
7. Under the **"From:"** drop down box, select the first day of the first day of the previous month.
8. Under the **"To"** drop down box, select the last day of the previous month.
9. Click on **"Preview Report"**
10. When the **"Report Preview"** sheet comes up click **"Print"**
11. This report will show you
  1. The name of the clients that scheduled an appointment

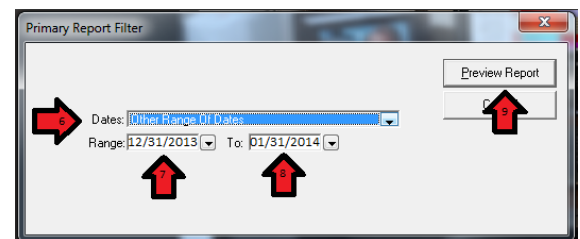
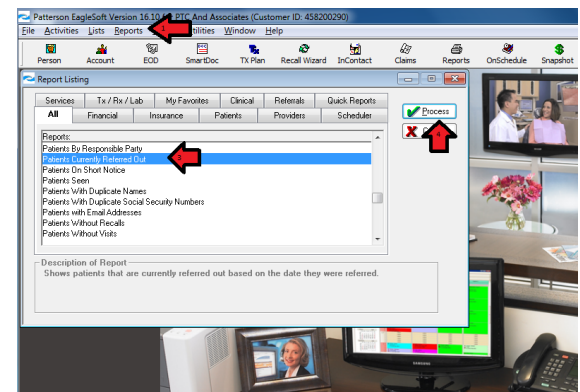




2. The address of the client that scheduled and appointment
3. The phone number of the client that scheduled an appointment
4. The responsible party for the client that scheduled an appointment
5. The date that the client scheduled the appointment
6. If they ever came in for that appointment
  1. This would be shown by a date appearing under the **"First Visit"** Column
12. Things to do with this report:
  1. Look for people that do not have a **"First Visit"** under the First Visit Column
  2. If you find someone that does not have a first visit but they scheduled you must call and follow up to get them rescheduled

## 5. Patients Currently Referred Out: (Reprinted once a month).

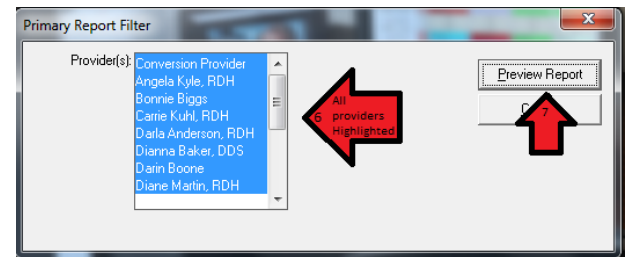
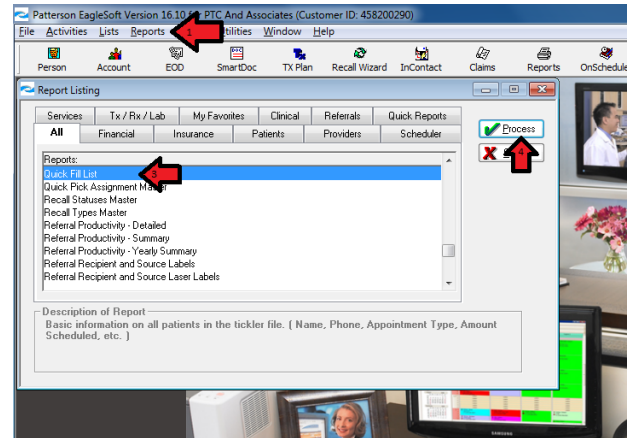
1. Click on the **"Reports"** menu from the top menu bar
2. Click on **"All Reports"**
3. Click on the **"Patients Currently Referred out"** report
  1. Note if you have not already done so; to make it easier to run the next time make sure that you put the **"Patients Currently referred out"** report into **"My Favorites"**
    1. From the **"Report listing"** menu select the **"Patients Currently Referred out"** report
    2. Right Click on the report
    3. Click on **"Add this report to my Favorites"**
    4. This report will be accessible from a central location (**My Favorites**) along with all the other reports that can be run from the **"Report Listing"** menu.
4. Click on **"Process"**
5. The **"Primary Report Filter"** box will appear
6. Under the **"Dates"** select **"Other Range Of End of Days"**
7. Under the **"From:"** drop down box, select the first day of the first day of the two months ago.
8. Under the **"To"** drop down box, select the last day of the previous month.
9. Click on **"Preview Report"**
10. When the **"Report Preview"** sheet comes up click **"Print"**
11. This report will show you:
  1. The name of the patient that was referred out.
  2. The date that they were referred out.
  3. What specialist they were referred to.
  4. When the expected return date is for that patient.
12. Things to do with this report:
  1. Make a care call to all patients on the list to make sure that treatment at the office that they were referred to is going well. (sometimes patients don't even make an appointment when they leave the office due to fear or other reasons)
    1. It is of better service for the patient that we control the appointment process when we refer them out. Meaning that we should call the office that we are referring the patient to, and make the appointment for them.
    2. When we make the appointment for the patient we make a note on the chart as to when their appointment is for, so that we can do a follow up care call to them once they have gone.
    3. This will also give us an opportunity to schedule them back to our office
    4. Note that people that are referred out do not appear on the Treatment plan reports.
  2. Review the Expected return dates to make contact with the clients a few days before so that we can get them on the schedule





6. **Quick Fill:** Cancellation/No Show report for doctor (This report should be printed every week)

1. Click on the **"Reports"** menu from the top menu bar
2. Click on **"All Reports"**
3. Click on the **"Quick Fill "** report
  1. Note if you have not already done so; to make it easier to run the next time make sure that you put the **"New Persons"** report into **"My Favorites"**
    1. From the **"Report listing"** menu select the **"Quick Fill"** report
    2. Right Click on the report
    3. Click on **"Add this report to my Favorites"**
    4. This report will be accessible from a central location (**My Favorites**) along with all the other reports that can be run from the **"Report Listing"** menu.
4. Click on **"Process"**
5. The **"Primary Report Filter"** box will appear
6. Under the **"Provider(s)"** select **"All providers"**
7. Click on **"Preview Report"**
8. When the **"Report Preview"** sheet comes up click **"Print"**
9. This report will show you:

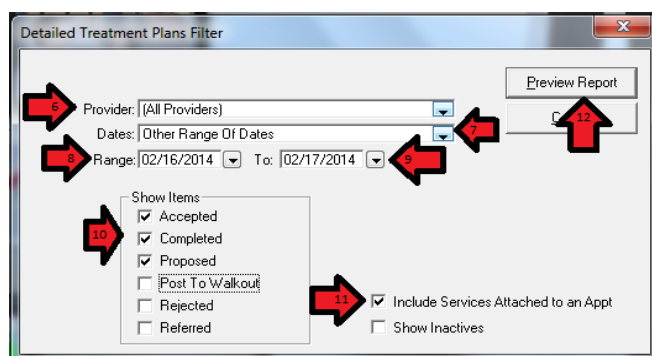
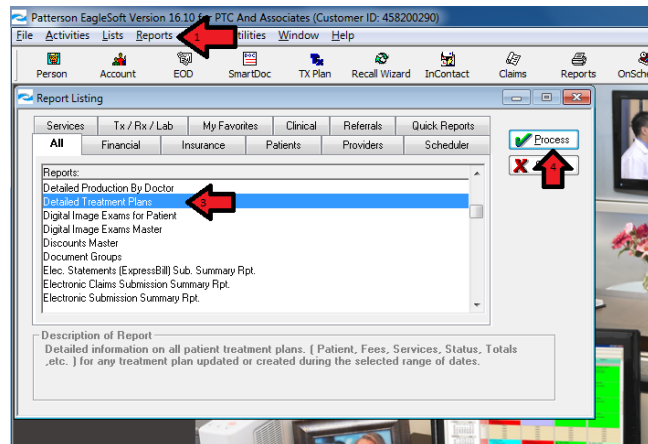


1. The name of the patient that was referred out.
  2. The Provider.
  3. Home / Work Phone numbers
  4. The date of the broken appointment
  5. The type of appointment that the patient had
  6. The Duration of the appointment
  7. The expected amount of Production for that appointment as pulled from the treatment plan
  8. A note field where we will document the detailed reason for the breaking of the appointment
10. Things to do with this report:
1. Make follow up calls to the patients that broke appointments
  2. Use the note field to refer back to why they broke the appointment in the first place.
    1. For example, if it was money related. Get them to come in so that we can make financial arrangements for them
    2. If they cancelled due to illness, etc. etc.
  3. Make sure that you update the patient chart after having a phone conversation with the patient so that there are notes on the computer.
  4. After there has been documented follow up delete the patient from the Quick fill and continue follow up.
  5. Make sure that patients do not appear on this report more than once for the same appointment (Compare to previous report)



7. **Detailed Treatment Report:** This report should be printed out every week on Monday

1. Click on the **"Reports"** menu from the top menu bar
2. Click on **"All Reports"**
3. Click on the **"Detailed Treatment Plans"** report
  1. Note if you have not already done so; to make it easier to run the next time make sure that you put the **"New Persons"** report into **"My Favorites"**
    1. From the **"Report listing"** menu select the **"Detailed Treatment Plans"** report
    2. Right Click on the repor
    3. Click on **"Add this report to my Favorites"**
    4. This report will be accessible from a central location (**My Favorites**) along with all the other reports that can be run from the **"Report Listing"** menu.
4. Click on **"Process"**
5. The **"Detailed treatment Plans Filter"** box will appear
6. Under the **"Provider"** Box make sure that; **"(All Providers)"** are selected.
7. Under the **"Dates"** box make sure that; **"Other Ranges of Dates"** is selected
8. Under the **"Range"** box enter the date of the previous Monday.
9. Under the **"To"** box enter the date of the previous Saturday.
10. Under **"Show items"** make sure that the following are selected
  1. Accepted
  2. Proposed
  3. Completed
11. Make sure that **"Include Services Attached to an Appt."**
12. Click **"Preview Report"**
13. When the **"Report Preview"** sheet comes up click **"Print"**
14. This report will show you:
  1. Name of the Patient
  2. The appointment Date (If they have an Appt.)
  3. The Service that were planned
    1. ADA Codes
    2. Description of services
    3. Tooth #
    4. Surfaces
  4. The Status of the Treatment (Proposed / Accepted)
  5. The Provider
  6. The Date planned
  7. The Fee Proposed
  8. Note your total Treatment Plan for the week
  9. The total that was produced from that week's proposed
  10. The total treatment accepted from the week's proposed
15. Things to do with this report;
  1. Make follow up calls on the patients that have not accepted treatment
  2. If a patient has accepted treatment but does t have an appointment to receive the treatment scheduled call them to schedule an appointment





## Case Management Binder Setup & Functionality

The Binder is divided by “**Monthly**” tabs. Each tab is to be labeled with the name of the months of the Year.

“January”  
“February”  
“March”  
“April”  
“May”  
“June”  
“July”  
“August”  
“September”  
“October”  
“November”  
“December”

Additionally; the binder is to be sub-divided with a weekly break down. Make 5 tabs labeled

“Week 1”  
“Week 2”  
“Week 3”  
“Week 4”  
“Week 5”

This binder is set up to be a continuous use tool.

1. The current month tab should be the first tab.
  - a. The first page behind the Current Monthly tab should be the “**OnSchedule**” monthly print out.
2. The weekly tabs should be positioned directly behind the current “**Month Schedule**” print out.
3. At the beginning of each month move the Week 1 – 5 behind the current month.
4. Move the previous month to the back of the binder.
5. Once a week of the current month has ended, move the tab to the following month
  - a. By the end of the week there should be no Treatment Plans that do not have a future action planned; meaning that the tab should be empty by the time the current week is over.



## Case Management Step by Step Instructions

### Step #1

#### Filing of Treatment Plans

1. If a Treatment plan was not started on the day of the visit.
  1. A copy of the Treatment plan is to be filed in the case management binder.
  2. The treatment plan if not accepted is filed in the week that we are currently in.
    1. IE. A treatment plan that is not accepted today will be filed in the Tab that belongs to today for follow up within 48 hours.
2. The past treatment Plans are to be filed in the Binder
  1. Follow up intervals
    1. **48 Hours:** Thank the patient for coming, and see if there are any questions that they may have.
      - a. "Hi, this is Mary from Aava Dental in Irvine, I am just calling to see how you are doing and to thank you for visiting us a couple of days ago. Do you have any questions that I can answer for you?" ... "With your permission I am going to call you in about a week or so to check in with you"
        - i. Sometimes patients are either too embarrassed or intimidated to ask questions that might help them make a decision to complete their treatment.
    2. **1 Week Follow up:** The patient has now had plenty of time to think about the Treatment.
      - a. "Hi Mike, this is Mary from Aava Dental. I am calling as promised to check in with you to see if any questions have come up regarding your treatment. If the patient says that they do not have any questions GO FOR THE CLOSE.
      - b. "Ok I am glad that you understand your treatment, Lets go ahead and schedule that for you. What day works best for you to come in and get started?" Always give them only two choices at a time. (morning or afternoon, 2:15, or 3:45) Giving the patient two options only makes it easier for the patient to make a decision.
      - c. If the patient does not agree to book for the appointment move the Treatment Plan to "**2 Weeks**" in the future.
    3. **3 Week Follow up:** If the patient does not book after the 1 week follow up.
      - a. **This time it will be ok to push and probe a little bit.** This does not mean that you can be rude or short with the patient, after all they are still our patient, and you will see them over and over again if we have done a good job at educating them about the importance of Hygiene.
      - b. "Hi Mike, it's Mary from Aava dental Irvine again. I am calling to get you on the schedule for that crown that you need. Dr. Smith asked me to call you today, because he was worried that the tooth needs to get handled as soon as possible. When can you come in Wednesday or Friday?"
        - i. If the patient says no: "Mike, I want to help you in any way that I can. Would you mind telling me what is stopping you from doing this crown? I know that it is bothering you, and I know that you want to get it done, how can I help you come in?"





- ii. Listen to the patient's origination, and handle it. For Example: "I am really worried about the needles, and I get very nervous about the noise of the drills" Ok now at least you know what is holding this particular person back. The point is that you have to ask and probe so that you can handle the real reason that the patient is not coming back to start his treatment.
- c. If the Patient does not wish to commit to the treatment, let make sure that they are committed to coming in for the hygiene recall appointment that they made before they left the office.
- d. Send the Client a 3 week Follow up letter.

## **Step #2**

### **Quick Fill Report**

1. Print out each provider's quick fill report.
2. Make a follow up call on all cancelled appointments from the previous week
3. Document all follow up phone calls in patient's memo.
1. Documentation of phone calls, etc. in patient notes
2. All staff members should document their conversations; follow up calls, etc. in the patient's note history.
3. Click on Note History on top of the icon bar
  - a. Make sure you have selected this icon so that it shows up on the icon bar
4. Click on the note type and select appropriate note name and then type.
5. Document the Following:
  - a. Notes that have to do with the acceptance of the Treatment (for future reference)
    - i. For Example; "Patient was hesitating on starting treatment, I suggested that we do a payment plan, and then the patient got excited and agreed to start right away"
  - b. Notes that have to do with the rejection of Treatment Plan (For future reference)
    - i. For Example; "Patient is not happy with the amount that they were quoted on the price of the implant"
6. Click on the note type and select appropriate note name and then type.

## **Step #3**

### **Detailed Treatment Plan Report**

1. Print out the Detailed Treatment Plan report
2. Cross reference the report to the treatment plans that are or will be filed in the binder under the appropriate week.
  - a. This will help you see if there are any treatment plans that are not being followed up on.
  - b. Additionally this will help you clear out old treatment plans that are no longer outstanding but are still behind one of the tabs in the binder. IE, the treatment was completed but the report was not pulled from the follow up tab.

## **Step #4**

### **New Patient Report – Money Finder**

1. Print out the New Patient Report from the Money finder
2. Look at the print out, and see if there is any missing information that you might be able to get on your next phone call with the patient.
  - a. Make sure that we have a phone number for home, and work.
  - b. Make sure that we have a Cellular phone number for the patient



- c. Make sure that we have an Email
3. Verify that all of the patients that came in for their first appointment left with a re-care appointment
4. Make a note that all of the New Patients either have an appointment to receive treatment, or have the treatment plan in the Case Management Binder.

## **Step #5**

### Referral Productivity Detailed Report

1. Print out the referral Productivity Detailed Report
2. Make sure that all of the patients that are on the Money finder report appear on this report
  - a. If the Patient is in the Money finder report, and not in this report that means that there is no referral source on the patient file
  - b. If the patient does not appear here and do appear on the money finder report. Update the referral source
  - c. After all of the people for that time period have the appropriate referral source re-run the report.

## **Step #6**

### New Person Report (To be run on a weekly basis)

1. This is a list of people that scheduled their first appointment
2. If the patient does not have a date under the Initial visit Column then they did not show up for their appointment
  - a. Call the client to re-schedule them to come in for their initial appointment
  - b. Note the patient file with conversation notes, and they you attempted to re-schedule them
3. Make sure that this report is run once a week so that no one goes without follow up

## **Step #7**

### Patients Currently Referred Out Report

1. Make a care call to all patients on the list to make sure that treatment at the office that they were referred to is going well. (sometimes patients don't even make an appointment when they leave the office due to fear or other reasons)
  - a. It is of better service for the patient that we control the appointment process when we refer them out. Meaning that we should call the office that we are referring the patient to, and make the appointment for them.
  - b. When we make the appointment for the patient we make a note on the chart as to when their appointment is for, so that we can do a follow up care call to them once they have gone.
  - c. This will also give us an opportunity to schedule them back to our office
  - d. Note that people that are referred out do not appear on the Treatment plan reports.
2. Review the Expected return dates to make contact with the clients a few days before so that we can get them on the schedule



**The Case Management follow up system, report review process must start all over again the first week of each new month on previous month.**

**There should not be any paperwork left in the binder from previous month since you have forwarded the individual treatment plans to the future date range when another contact is appropriate.**

Each day the Office Manager will open the Binder and follow up with any unscheduled treatment plans placed on current Week.

Managing a daily follow up ensures that you never let a patient's treatment plan sit more than two weeks in the Case Management Binder without making telephone contact.

New Patients that have a large financial arrangement and treatment plan: Place their Treatment Plan/Presentation Form and Financial Arrangement in the Case Management Binder on the week you need to do the follow up call.  
Verbal skills: *"With your permission I would like to call you in a couple of days to see if any questions come up"*

For long-term follow-up, forward-file the Treatment Plan into the month you feel is appropriate. Keep an eye on the due date for recare - particularly if the patient is not scheduled. This is handy when the patient appears motivated, yet wants to put a major trip, financial commitment, or other project out of the way before proceeding. *"Call me in June after my European cruise."*

Enter your notes into the computer. The treatment plan will be reviewed again in one of two scenarios:

- ☐ At the next recare visit – hygienist's huddle preparation.
- ☐ When the patient has an emergency.