

Observation Management Process START MORE SMILES™

- To help manage follow-up actions for your Observation patients.
- To place patients into the Observation Management process from the Cheat Sheet or the Action button on the Dashboard.

1 Determine the Type of Follow-Up Needed for the Patient

When you place a patient into Observation Management you can either schedule a future appointment or schedule a follow-up

Schedule a Future Appointment

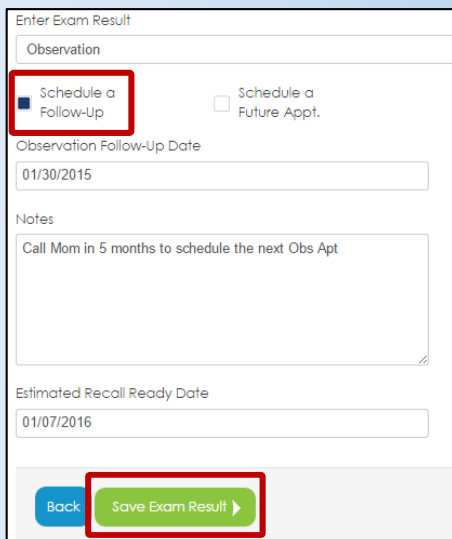
- Follow this process when **you have scheduled** the next Observation appointment in your Practice Management Software
- The patient will appear in the Today filter on the set appointment date

Schedule a Follow-Up

- Follow this process when you **do not have** the next Observation appointment scheduled in your Practice Management Software
- The patient will appear in the Follow-Up filter on the set date to remind you to contact the Primary Contact and schedule the next Observation appointment

2 Place Patients into Observation Management from the Cheat Sheet

- Scroll to the bottom of the Cheat Sheet
- Select **Observation** from the **Enter Exam Result** field
- Check the **Schedule a Follow-Up** box to schedule a follow-up reminder
- Check the **Schedule a Future Appt.** box to schedule the next Observation appointment



Enter Exam Result

Observation

Schedule a Follow-Up Schedule a Future Appt.

Observation Follow-Up Date

01/30/2015

Notes

Call Mom in 5 months to schedule the next Obs Apt

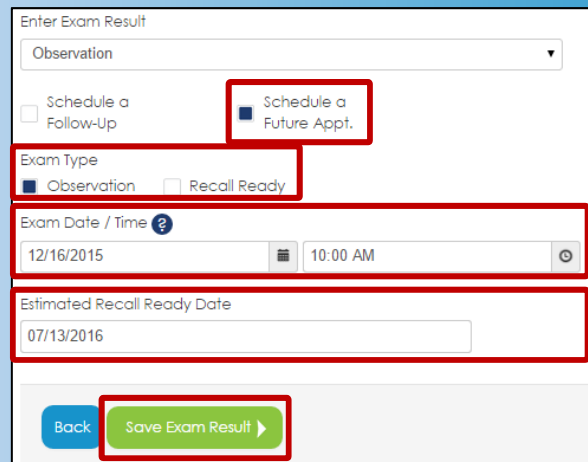
Estimated Recall Ready Date

01/07/2016

Back Save Exam Result ▶

Schedule a Follow-Up

- Set the Observation Follow-Up **Date**
- Enter a **Note** regarding the follow-up
- Set an Estimated Recall Ready Date, if known
- Click the **Save Exam Result** button



Enter Exam Result

Observation

Schedule a Follow-Up Schedule a Future Appt.

Exam Type

Observation Recall Ready

Exam Date / Time ?

12/16/2015 10:00 AM

Estimated Recall Ready Date

07/13/2016

Back Save Exam Result ▶

Schedule a Future Appointment

- Check the appropriate the **Exam Type**
- Set the **Exam Date and Time**
- Set an Estimated Recall Ready Date, if known
- Click the **Save Exam Result** button

Observation Management Process

3 Place Patients into Observation Management from the Dashboard

- Click the **Action** button and select the **Observation** option
- Check the **Schedule a Follow-Up** box to schedule a follow-up date
- Check the **Schedule a Future Appt.** box to schedule the next Observation appointment

Observation

Schedule a Follow-Up Schedule a Future Appt.

Observation Follow-Up Date
05/07/2015

Notes
Call dad in 5 months to schedule the next Obs Apt

Estimated Recall Ready Date
01/07/2016

Action

Tx Recommended

Observation

No Treatment

Specialist

Reschedule

No Show

Canceled

Observation

Schedule a Follow-Up Schedule a Future Appt.

Appointment Type
Observation

Appointment Date
12/09/2015 10:00 AM

Schedule a Follow-Up

- Set the Observation Follow-Up Date
- Enter a **Note** regarding the follow-up
- Set an Estimated Recall Ready date if known
- Click the **Save** button

Schedule a Future Appointment

- Enter the **Appointment Type**
- Set the **Appointment Date and Time**
- Click the **Save** button

4 Follow-up with the Primary Contact to Schedule Next Observation Appointment

If you scheduled a follow-up date the patient appears in the Follow-Up filter on the Dashboard reminding you to contact the Primary Contact and schedule the next Observation appointment

- Click the **Follow-Up** filter on the Dashboard
- Locate your patient, notice the **Follow-Up Type** is Observation
- Contact the Primary Contact and select the appropriate option under the **Action** button:
 - Set Follow-Up date** – to set another future follow-up reminder
 - Schedule Future Appointment** – to schedule the next Observation appointment

Smiling Forward - Den... Today Tomorrow Upcoming Needs Attention ¹⁰² Follow-Up ¹⁹ Start @ Home Insurance ¹⁵

Pending Management Help

Follow-Up Date	Last Appt.	Follow-Up Type	T.C.	Patient	Age	Primary Contact	Action
9/9/2014	9/9/2014	Observation	B.G.	Greenpt, Verde	25.11	Aunt Greenpc	<input type="button" value="Action"/>