

Create a List of Patients with Pending Treatment and Remaining Benefits

If your office uses treatment plans to record pending treatment for your patients, you can create a list of patients who have pending treatment and who also have insurance benefits remaining for this year. Once you have created the list you can use it as a call list to fill in your schedule, or as a mailing list for sending letters.

In this example, we will create a list of patients with pending unscheduled treatment who were diagnosed this year. We will remove inactive and uninsured patients, as well as patients with low remaining benefits. Finally, we will sort the list by name.

We have included the *optional steps* to make an account list using the patient list, in case you will be sending letters addressed to the Responsible Party only.

Create a New List

- From the *Main Menu*, click **User Defined Lists**. The *User Defined List* screen will open.
- Click  to add a new list. A new blank line will open.
- Type a description for the new list. Include the current date for later reference.
- Answer No to “Is this an account list?” and Yes to “Is this a patient list?”
- Your list is now created. Next, you need to specify who the list members will be.

Add Patients with Pending Unscheduled Treatment to the List

- Click the new list that you just created on your *User Defined Lists* screen. The list of entries for the new list will display. At this time, there are no entries.
- With the **List Builder** segment control button depressed, click on the first empty line. The *Turboscan* screen will open.
- In *Turboscan*, click **Patient>Treatment>Select by treatment plan**. The *Selecting patients based on treatment plan* window will open.
- Enter the beginning and ending dates of the diagnosis date range you are looking for in the **Diagnosis dates** field. In this example we’ll use January 1st of this year through today. You can type in the date or type Y in the **from** date field to default to January 1st of this year, and type in the date or type D in the **to** date field to default to today’s date. .
- Click **Include scheduled and unscheduled treatment** to open the drop-down list, and click **Only include unscheduled treatments**.
- Click **Add patients with selected treatment plan**.
- **Please wait...** will display while *Turboscan* finds the patients meeting the specified criteria. When done, the number of patients found will display at the top of the screen.

Remove Inactive and Uninsured Patients

- Click  three times to where you can click **Name**.
- Click **Name>Remove inactive patients**, then click .
- Click **Patient>Insurance>Private patients>Remove selected patient type**. Stay here.

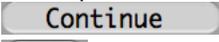
Remove Patients with Low Remaining Benefits

- Click **Patients by carrier or plan>Remove patients>by remaining benefit.**
- Enter your criteria for low remaining benefits. For our example we'll use from 0 to 200.00.
- Click **Begin scan.**
- Be patient. When the scan is complete, the message **Scan complete!** will appear. Click OK.

Sort the List by Name

- Click  five times back to the *List builder* screen.
- Click **Sort list by name** then click .
- Your patient list is complete.

Create a New Account List (*Optional*)

- From **User Defined Lists** click  to add a new list and type in the description.
- Answer Yes to "Is this an account list?"
- Click the new list that you just created on your User Defined Lists screen. The list of entries for the new list will display. At this time, there are no entries.
- With the List Builder segment control button depressed, click on the first empty line.
- The *Turboscan* screen will open.
- In Turboscan, click **Patient**, then **User List**, then **Add Patients**.
- Click on the patient list created in the previous steps.
- Click .
- Click  twice back to the *List builder* screen.
- Click **Sort list by name**, then click .
- Your account list is complete.

Questions? Contact the staff at Datacon for help.

www.datacondental.com

Phone: (800) 773-7878

Email: info@datacondental.com