How to Build a Holiday List

Each year beginning around the end of September our Customer Support department receives many calls about how to create a list of "active patients" to receive a holiday greeting. We get so many calls, we keep instructions close at hand! When you only do a task once a year it is hard to remember how to do it. When you *understand* what you are doing, remembering becomes much easier.

Step one is creating a list of patients who should receive a card. Many offices choose to include patients that have been in the office during the current year. The following instructions will show you how to build a list of patients who have been in during the current year, resulting in account list based on the patient list so that only one card goes out per account or family.

Create a New List

- From the *Main Menu*, click **User Defined Lists**. The *User Defined List* screen will open.
- Click **Add** to add a new list. A new blank line will open.
- Type a description for the new list. For this example, we'll use "Holiday Card List".
- 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.

Populate the List

Turboscan is Datacon's search engine. Turboscan will find anyone matching the criteria that you specify. In this example, we want to find all patients who have been in the office between January first of this year, and today.

- 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 **Treatment**, then **Select by last treatment date**.
- Enter the beginning date of the range you are looking for. In this example we'll use January 1st of this year. You can type in the date or type Y in the date field to default to January 1st of this year.
- Click **Continue** four times through the end date and two months fields. Those fields can remain set to their default settings.
- Click **Add selected patients**. Turboscan will locate the patients who meet the criteria and add them to the list.
- Click **Exit** three times back to the list builder screen.
- Click **Sort list by name** then click **Exit**
- Your list now contains the names for all selected patients. Next we'll build an account list for these patients to ensure only one card gets sent to each household.
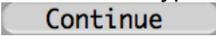
Create a New Account List

- From *User Defined Lists* click **Add** 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 List 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 "Holiday Card List."
- Click **Continue**
- Click **Exit** twice back to the list builder screen.
- Click **Sort list by name** then click **Exit**
- Your account list is complete.

Questions? Contact the staff at Datacon for help.
www.datacondental.com
Phone: (800) 773-7878
Email: info@datacondental.com