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Patient Spotlight

This chapter contains:

1-1  What is Patient Spotlight?
1-2  Setting up Patient Statuses
1-3  Setting up Patient Appointments
1-4  Create and Assign To-Dos
1-5  Patient Spotlight Reports
**Topic 1-1**

*What is Patient Spotlight?*

Patient Spotlight provides you with all the necessary information on tracking your new patients. Never again wonder what happened to a specific patient that came in two months ago and seemed to disappear. With Patient Spotlight, the status of every new patient can be tracked.

The flow chart shows you how Patient Spotlight was designed. With this example you can start thinking about your own patient statuses and To-Dos.

As indicated in this Flow Chart, **Blue Text** represents actions that someone in your office will be in charge of. The **Red Text** represents actions that Cloud9 automatically performs for you with the correct setup.

![Patient Spotlight Flow Chart Example](image)

**Figure 1-1: Patient Spotlight Flow Chart Example**
Let’s look at the following example, **Exam/Records – Appointment Status: Dismissed** item. The actions in this example are *appointment status* based. This means that when the Exam/Records appointment is dismissed, two To-Dos occur. Both a *Family Letter* and a *Dentist Letter* need to be created.

![Figure 1-2: Exam/Records Example](image)

Also in this example, there are six *patient statuses* that an individual could go into when the appointment is dismissed. These statuses can be triggered automatically based upon this appointment status.

![Figure 1-3: Patient Statuses Example](image)

Once a Patient Status is determined, each status contains additional actions. You can see from this flow chart each new patient belongs to a specific status.

There are three specific areas that need to be addressed in order for Spotlight to give you the information you need concerning your new patients. Each of these areas is located in the Setup menu.

**Topic 1-2**

**Setting up Patient Statuses**

Patient Statuses are designed to have a ‘Parent’ and ‘Child’ relationship. As indicated by the flow chart, a new patient can be placed in several statuses. The exam could have been just scheduled, the patient might not be ready for braces or the patient might be
deciding if they want to go ahead with treatment. You need child statuses setup properly to give you tracking abilities.

1. From the Edit toolbar, click **Setup** icon.
2. Select **Patient Status** item, click **Add** icon. In this example, we are selecting the Exam Scheduled status for viewing.

<table>
<thead>
<tr>
<th><strong>FIELDS</strong></th>
<th><strong>DESCRIPTION</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The name of the patient status.</td>
</tr>
<tr>
<td>Code</td>
<td>The unique identifier for the status.</td>
</tr>
<tr>
<td>Parent</td>
<td>If the status you are creating is a 'child' status, select the parent from the drop down arrow.</td>
</tr>
<tr>
<td>Default Months</td>
<td>How many months are you expecting to remain in this status?</td>
</tr>
<tr>
<td>Progress Months</td>
<td>How many months before a progress exam should be done?</td>
</tr>
<tr>
<td>Order</td>
<td>The numeric order of the status.</td>
</tr>
<tr>
<td>Is Active</td>
<td>Does this status indicate an active patient?</td>
</tr>
<tr>
<td>Is Case Start</td>
<td>Does this status indicate a new start?</td>
</tr>
<tr>
<td>Is Inactive</td>
<td>Does this status an inactive patient?</td>
</tr>
<tr>
<td>Is Retention</td>
<td>Does this status place the patient in retention?</td>
</tr>
<tr>
<td>To-Dos</td>
<td>Add as many automatic To-Dos that should be associated with this status.</td>
</tr>
</tbody>
</table>

Once the Parent Status is setup, you want to start setting up the child statuses. There could possibly be many of these but before jumping right in you might want to ask these questions.

My new patient did not show up, now what status are they in?
How long should I wait to call them back and how will I remember?
My new patient is thinking about treatment options, what status should they be in?
Considering questions like these will assist you in setting up correct child statuses.

4. Fill in the **appropriate information**, click **OK** button to save.

In Figure 1-4, the parent status is New Patient and a child status is Exam Scheduled. The Exam Schedule status has several To-Dos assigned based upon this status.

![Patient Status To-Dos](image)

**Figure 1-5: Patient Status To-Dos**

These To-Dos remind the appropriate employee or position to follow up with specific To-Dos for the newly scheduled patient.

It is advisable to take into consideration how your practice schedules your New Patient Exams in order for the child status to be setup properly. Your practice might do a one-step start that would be a New Patient Exam/Records/Consult in one appointment. Your child statuses would look very different from our example flow chart. I advise creating your own practice diagram before adding any new patient statuses. Once you have designed what your office needs, click the **Add** icon to start creating.

**Topic 1-3**

**Setting up Patient Appointments**

Once you have created your Patient Statuses, you can start applying them to specific appointments.

1. From the Edit toolbar, click the **Setup** icon.
2. Select **Appointment Types** item.
3. Click the **Add** button to start applying the Patient Statuses.

![Figure 1-6: Appointment Type](image)

**Figure 1-6: Appointment Type**

4. Fill in the **appropriate information**, click **OK** button.

If you do not check **Is Automatic**, you have complete control of selecting the Patient Status that a patient goes into. When an Appointment Status changes to Dismissed a new patient could go into many statuses as indicated in the Flow Chart. You would need to select the status.

<table>
<thead>
<tr>
<th>FIELDS</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment Type</td>
<td>The name of the appointment selected.</td>
</tr>
<tr>
<td>Appointment Status</td>
<td>When the status of the appointment changes to the selected status, what will the patient status become?</td>
</tr>
<tr>
<td>Patient Status</td>
<td>Select the patient status when the appointment status changes.</td>
</tr>
<tr>
<td>Is Automatic</td>
<td>Check this if there is only one status a patient can go into. For example, if a patient does not show up for their appointment, they might only go into New Patient/Exam No Show status.</td>
</tr>
</tbody>
</table>
As you can see by the above example, a patient’s current status is Exam Scheduled. She has come in for her appointment and you have clicked the Dismiss button. You can now select the appropriate New Patient Status that applies to this patient.

You can also view the Pending To-Dos associated with her current status. If the To-Dos have not been completed, they will be deleted automatically as they no longer apply to the patient’s new status.

1. Click the View button; the To-Dos associated with the patient are displayed.

2. Click Close button.
Create and Assign To-Dos

You know that you can make additional To-Do types in the Setup menu. Once they are created assign them to any Appointment Type or Patient Status. As displayed in the Flow Chart reminders are critical to knowing exactly the things that needs to take place to keep track of your new patients.

When creating To-Dos, assign an employee or an employee type in the fields. If you fill in both fields the Emp Assignment Type supersedes any employee listed in the prior field. If you do not assign an employee or employee type for the To-Dos, the system prompts whom to assign the To-Do once you click on the OK button.

Any To-Dos assigned to a patient that did not get completed, or are now not needed are deleted when a new status is set. An example might be a new patient came in for their exam this morning and is going to come back this afternoon to start treatment. The To-Dos assigned in the morning will be deleted if they have not been completed by this afternoon.

Assign a To-Do to a Patient Status

A Patient Status might trigger many To-Dos based upon the protocols of your office.

1. From the Edit toolbar, click Setup icon.
2. Click Patient Status item.
3. Select the status to add a To-Do, click Edit icon.
4. In the To-Dos section, click Add button.

5. Fill in the appropriate information, click OK button. Add additional To-Dos as required.
Assign a To-Do to an Appointment Type
An Appointment Type might trigger many To-Dos based upon the protocols of your office.

1. From the Edit toolbar, click Setup icon.
2. Click Appointment Types item.
3. Select the appointment to add a To-Do, click Edit icon.
4. In the To-Dos section, click Add button.
5. Fill in the appropriate information, click OK button. Add additional To-Dos as required.

Topic 1-5

Patient Spotlight Reports
After all information has been setup correctly, reports can be generated giving you the information you need. These reports require the appropriate permission settings for each employee that will view these reports. The minimum permission needed would be Run Reports and RPT: Spotlight History By Patient. If you need an employee to run a report of All To-Dos by Employee, also include RPT: To-Dos by Date Range.

Report Permissions
1. From the Edit toolbar, click Setup icon.
2. Click Employees item. Select the employee to grant report permissions click Edit icon.
3. Click OK button to save. Close the Employees window.

View the Spotlight History By Patient
1. From the Reports toolbar, click Reports icon.
2. Select the To-Dos by Date Range report.
3. Select the **Employee** you want to see the To-Dos for. Enter in the **Start Date** and **End Date**.
4. Check **Hide Completed** checkbox if desired.
5. Click **Preview** button.

![ToDos by Date Range](image)

*Figure 1-12: To-Dos by Date Range*

6. Click **OK** button to close.

**Spotlight History By Patient**
This report displays all history information on a specific patient, from appointments to documents printed.

1. From the Reports toolbar, click **Reports** icon.
2. Select the **Spotlight History By Patient** report.
3. Select the **patient** you want to see. Enter in the **Start Date** and **End Date**.
4. Click **Preview** button.

![Spotlight History By Patient](image)

*Figure 1-13: Spotlight History By Patient*

**Topic 1-5**

**Spotlight Viewer**
The Spotlight Viewer, similar to the Data Miner, allows you to build your own custom reports. You can select the information that you need as well as setting up parameters for viewing the results. Once the report is setup, simply save it for future use.
There are two sections to the report. The top section is divided into two areas. The left area is where you select the columns you would like to view in the bottom section. The column choices are *Patient*, *Recipient* and *To-Do*.

![Patient Spotlight Columns](image)

**Figure 1-14: Patient Spotlight Columns**

The right area is where you create the filters to specify conditions on the selected date. The filter choices are based on fields from the *Patient* and *To-Do* columns.

![Patient Spotlight Filters](image)

**Figure 1-15: Patient Spotlight Filters**

The bottom section of the report is where you view the results of your selections and filters.
In this example a report has been created to demonstrate functionality. As every office required specific data parameters, your Spotlight Specialist will help you create your own custom report to get the results you need. Just call Support (800-394-6050 Opt 2) for assistance.

The example report has several goals to display.
1. Any New Patient Exams within a specific timeframe that have started treatment.
2. The names of the patients.
3. Has an Initial Exam letter been sent to their General Dentist?
4. Who is their General Dentist?
5. Who is the Employee (Treatment Coordinator) assigned to the patient to send out the letter?
Patient Columns

Quite a few fields available from the Patient Columns area are items that were created in Setup. For example, all of the First Appointment Date fields are your actual appointment types. If you scroll down a little further the names of your letter templates as well as your patient statuses are yours as well.

![Patient Columns](image)

**Figure 1-18: Fields Available for Selection**

By selecting the fields:

1. First Letter Date C9O Initial Exam DOCTOR
2. Last Contract Start Date
3. Patient Full Name
4. Patient New Patient Exam Date
5. Patient Status Description
6. Patient Status Start Date

I have satisfied my goals of displaying the names of patients that have had a new patient exam appointment, that have started treatment and that should have had an Initial Exam letter sent to their General Dentists. By selecting the Patient Status Description and Start Date, I am verifying the start of treatment. Some offices elect to start treatment by the Contract Start Date rather than by the Patient Status Start Date. I have included both fields in my example. You might decide to select a different combination of fields for your report.

**Collapse/Expand Columns**

You can collapse expanded columns for ease in selecting and viewing fields.

1. Click on the **Arrow** button to expand/collapse columns for viewing.
Recipient Columns
The Recipient Column is where you can specify by relationship type the individuals you want to view. For example, by check the Recipient Name field, you can then select the Recipient Type from the drop-down field. In my report, one of my goals was to show the name of the patient's General Dentist. Selecting the Recipient Type: Patient's Professional accomplishes this.

![Recipient Columns](image)

Figure 1-19: Collapse Columns

Todo Columns
The To-Do Columns contain fields that can be selected based upon tasks that have been assigned to a specific individual. In my example, I have selected:

1. To Do Assigned Employee
2. To Do Date Completed
3. To Do Description
4. To Do Due Date
5. To Do Is Completed
6. To Do Letter
7. To Do Recipient

My goals of viewing the employee whom was assigned to send out a specific letter, if and when it was completed, as well as verifying the letter and recipient are satisfied.
**Patient Filter Column**
Since my goals were to display the New Patient Exams within a specific timeframe, I needed to specify the range. The Patient Filter column provides that functionality.

1. Click the **Green + Plus** symbol in the **Patient Filter** column. When adding a new filter, the first field in your list is selected.
2. Click the **drop-down arrow** to select the correct field that filter will be applied to.

   ![Figure 1-21: Patient Filters](image)

3. Select the **Filter** type. Each time you run this report, verify the dates are correct for the date range you require. Each time you type in a date, that date is saved with the report.
4. If you create a filter that is not needed, click the **Red X**.

**To-Do Filter Column**
I want to specify the employee responsible for sending out letters. This is a To-Do task so I need to add a To-Do filter.

1. Click the **Green + Plus** symbol in the **To-Do Filter** column. When adding a new filter, the first field in your list is selected.
2. Click the **drop-down arrow** to select the correct field that filter will be applied to.

   ![Figure 1-22: To Do Filter](image)

3. Type in the employee's name using the usual way – last name, first name.

**Load the Report**
1. To view the results of the report, click the **Load** icon.
Notice the date format. This was specified in the field selection. The entered format of:

MM/dd/yyyy

gives the result of 10/15/2015

If you do not enter a **Capital MM**, the results will display Minutes, **NOT** Months. If you ever see a year displayed as:

10/15/0001 this indicates that the date is missing in the patient’s information.

**Expand/Collapse To-Dos**
If you see a Plus symbol to the left of the Recipient Name as in this example, there are To-Dos that can be expanded.

1. Click the **Plus** symbol.
2. Click the now - Minus symbol to collapse the To-Dos.
3. Click the Expand All Plus symbol to the left of the Recipient Name column to expand/collapse ALL To-Dos.

**Blank Field Columns**

In the example, notice the Recipient Name field is blank for a few patients.

1. Click in the blank column field, all relationships is displayed for that individual. If a patient has more than one General Dentist you will need to select the recipient.

**Figure 1-27: Displayed Relationships**

2. Select the appropriate recipient for the letter.
3. If no professionals display, this means that the patient does not have one setup.

**Save Spotlight Report**

1. Click Save icon. Click the Save item to save the report the first time and enter a name. If you need to duplicate a Spotlight Viewer report and make changes, click Save As and give the report a new name.
Queue Letters
1. Click Queue Letter icon. Select the Document, click OK button. The Letter Queue opens ready for you to merge the letters.

Labels
1. Click Labels icon. Select the Envelope/Label Type, click OK button.
2. The report generates ready for you to print the labels.

Add a To-Do
1. Click the To-Do icon.
2. Fill in the appropriate information to add a To-Do for an employee.
3. Click OK button.

Print
1. Click Print icon, select Print List. All items will be printed.

Export Data
1. After loading the results, click Export Data icon. The Save window opens.
2. Enter a name in the Save As field and select the location for saving.
3. Click Save button. A prompt appears.

4. Click OK button to acknowledge the prompt.
5. If you open the file in Excel it will look similar to the next figure. All information is displayed along with the To-Do information.

Figure 1-29: Data Miner Export Prompt

Figure 1-30: CSV File Opened in Excel