dentrix MAGAZINE

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Dentrix Magazine Volume 25 Issue 2 — Summer 2013

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Can You Text That to Me?

FROM THE EDITOR

It may not shock you to learn that 92 percent of adults ages 18-49 send and receive text messages, but you might be surprised to hear that 72 percent of adults in the 50-64 age range also use text messaging. All this texting adds up. Recent estimates suggest that Americans sent 2.2 trillion text messages in 2012, or 19 text messages per person per day.

Generations of adults are learning to communicate differently than they used to. Is your practice keeping up? As contributing editor Erin Brisk points out, "If you're not taking full advantage of the latest communication tools and technologies, you're probably not communicating with your patients as effectively as you could be." In her article, " Make It Personal" (pp. 14-18), Erin describes how you can use Dentrix Communication Manager to unify postcard, email, text message, and chat communications to keep your patients connected with your practice.

Another way to better connect with your patients is to hold a daily huddle. Authors Lois Banta and Tammy McHood explain that daily huddles "provide valuable information about patients coming in for the day," which helps team members improve communication and the quality of patient care. In their article, "Secrets of a Successful Daily Huddle" (pp. 22-26), Lois and Tammy share the *who*, *what*, *where*, *when*, and *why* of successful daily huddles. They also explain how you can use the Daily Huddle Report in Dentrix to make your daily huddles even more effective.

I hope you enjoy reading these and other articles in *Dentrix Magazine*. Please consult the reading guide on page 2 to find the articles that correspond to your responsibilities in the dental practice. And remember, every issue of *Dentrix Magazine* is available online at www.dentrix.com/magazine. Download yours today.

Regards,

Matt Singerman
Editor

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HOW TO LEARN MORE

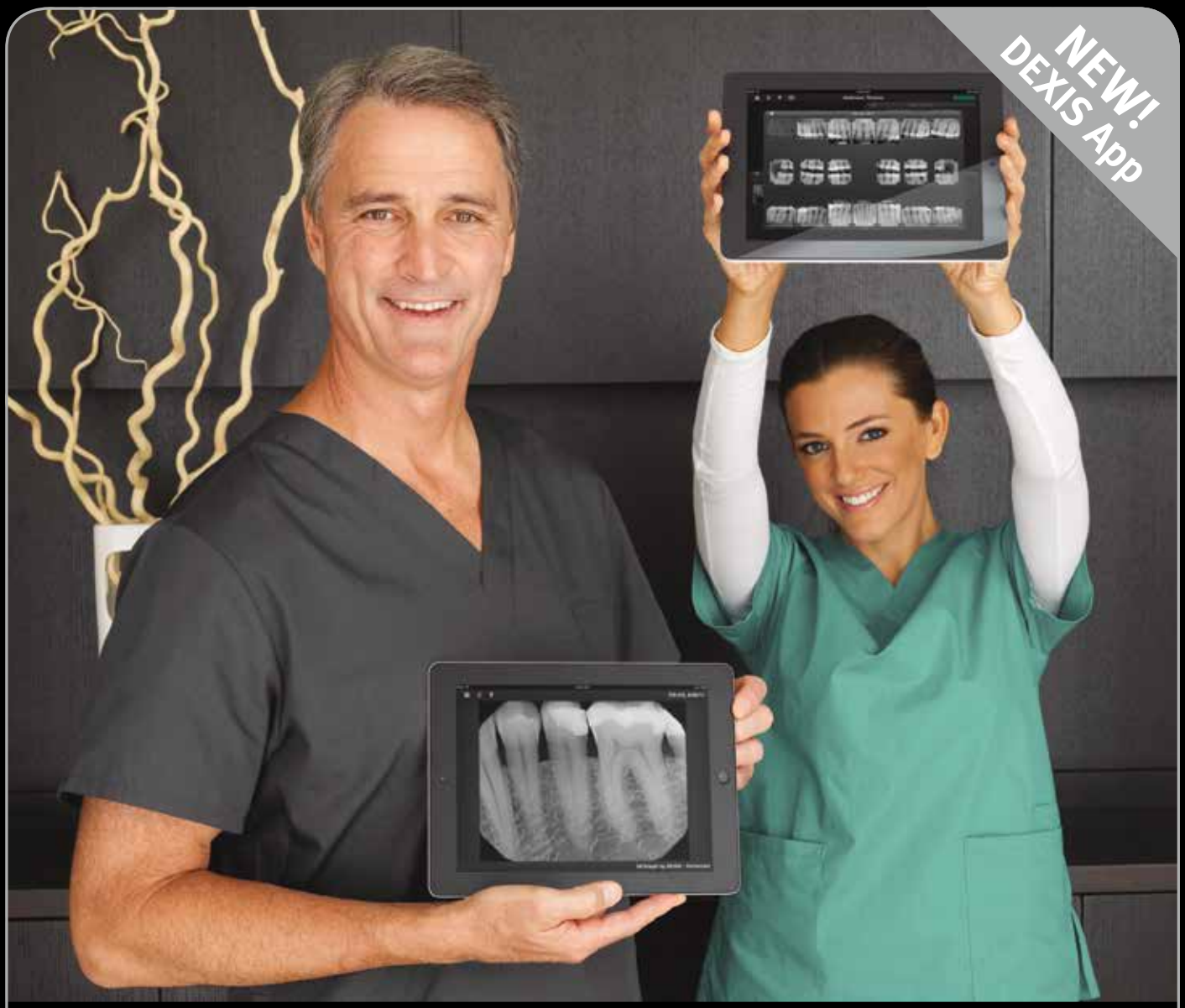
If you want to learn more about the Dentrix topics featured in *Dentrix Magazine*, check out these self-paced learning resources.

Dentrix Help Files

In the *Dentrix Help Files*, you can explore a comprehensive list of conveniently indexed topics or search the topics for key words. To search the help files, from the **Help** menu in any Dentrix Module, click **Contents**, click the **Search** tab, type a search phrase or topic name, click **List Topics**, and then under **Select Topic**, double-click the topic name. Tip: To turn off the search highlights, press F5.

Dentrix Resource Center

The Dentrix Resource Center offers an online library of on-demand software training videos, downloadable product manuals, and a knowledgebase of technical support articles. Access is free for dental practices on a Dentrix Customer Service Plan. Log in today at www.dentrix.com/resource-center.



Introducing **DEXIS go**®. Patient communication with a personal touch.

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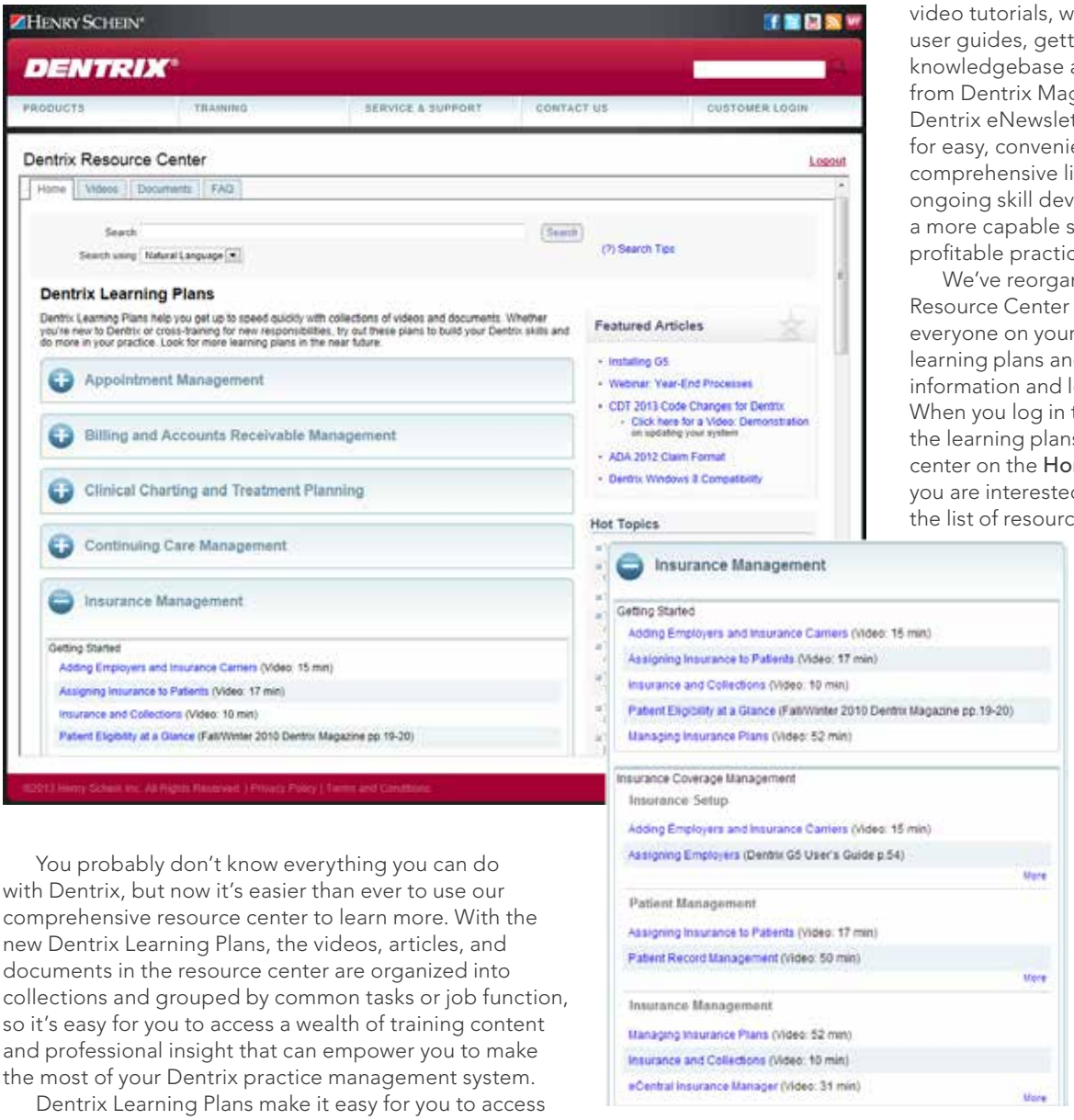
Dentrix Learning Plans: The New, Smart Way to Learn



You probably don't know everything you can do with Dentrix, but now it's easier than ever to use our comprehensive resource center to learn more. With the new Dentrix Learning Plans, the videos, articles, and documents in the resource center are organized into collections and grouped by common tasks or job function, so it's easy for you to access a wealth of training content and professional insight that can empower you to make the most of your Dentrix practice management system.

Dentrix Learning Plans make it easy for you to access valuable information that can benefit every member of the team. New staff members can use learning plans as a study list to help them learn how to effectively use Dentrix in their new job. Existing staff members can become more efficient and knowledgeable by learning about new features and tips related to their job functions. And staff members who are looking to transition into new roles in the office or who need to be cross-trained can prepare ahead of time so they're ready to take on their new responsibilities when the time comes.

You get Dentrix Learning Plans at no additional cost with your Dentrix Customer Service Plan. That means you have instant access to a huge selection of information, including video tutorials, webinar recordings, user guides, getting started guides, knowledgebase articles and articles from Dentrix Magazine and the Dentrix eNewsletter—all organized for easy, convenient reference. These comprehensive lists of resources enable ongoing skill development and ensure a more capable staff—and a more profitable practice.

We've reorganized the Dentrix Resource Center to make it easy for everyone on your team to find the learning plans and quickly locate the information and learning tools they need. When you log in to the Resource Center, the learning plans will be front and center on the **Home** tab. Select the topic you are interested in, then scroll through the list of resources. When you find what you want, click on the link and it will take you directly to the resource.

Currently, there are five available topics in the learning plans: Appointment Management, Billing and Accounts Receivable Management, Clinical Charting and Treatment Planning, Continuing Care Management, and Insurance Management. Over the next several months, we'll add more Learning Plans that address the various tasks you do every day, such as Patient Information Management and Practice Management.

Dentrix Learning Plans help you get the most out of your Dentrix investment and promote continuing education and skill building within your staff. Give your practice a competitive edge today by logging in to the Dentrix Resource Center at www.dentrix.com/resource-center and using the new Dentrix Learning Plans.

New Insurance Carrier Connections

DENTRIX® eClaims

Dentrix now has an eClaims connection with several new payors. If any of your patients are using these carriers, you can reduce paper claims and submit claims through Dentrix instead.

PAYOR ID	PAYOR NAME
CB752	Lockard & Williams
CB733	Patient Services, Inc.
CB951	Group Benefit Services, Inc.
00580	CareFirst Maryland BCBS
75130	UMC Health Plan
39199	Cypress Benefits
88019	Teachers Health Trust

DENTRIX® Attachments

You can now reduce the need to duplicate X-rays, photos, and other supporting claim documents by sending electronic attachments to the following payor:

PAYOR ID	PAYOR NAME
00580	CareFirst Maryland BCBSw

DENTRIX® eEOB

A benefit of Dentrix G5 is the ability to receive EOBs electronically. The following payor is now connected to provide this service:

PAYOR ID	PAYOR NAME
37224	Pittman & Associates

View the entire list of electronic payor connections using the Payor Search Tool at http://www.dentrix.com/products/eservices/eclaims/payor-search.aspx. You can search for specific payors or download the complete payor list.

Simplify Updates with the Dentrix Update Manager

The latest version of Dentrix (Dentrix G5 Productivity Pack 1) includes the new Dentrix Update Manager. The Dentrix Update Manager helps you keep your software up to date by notifying you when new updates are available and giving you the status of each so you can easily see which updates require you to take action. It takes the guesswork out of deciding how important the update is, when you should install it, and whether it applies to your practice.

Once Productivity Pack 1 is installed, when you open a Dentrix module and updates are available, the Dentrix Update Manager will appear and display a list of updates. At a glance you can see the name, file size, and status of the update, along with a description of the update, a link to learn more about it, and a color-coded update severity level. Critical updates that must be installed to protect the integrity of your software (such as the recently-released Hotfix 2) will have a red severity, important updates that contain new features and bug fixes that should be installed but can be delayed will have a yellow severity, and optional updates that may not apply to all practices will have a green severity.

Since some updates will not apply to your office (like an update to an add-on product that you don't use), you can choose to ignore some updates. Unless you include ignored updates in the list, ignoring an update will remove it from the update manager list so that you can clearly see the new updates you need to review.

The Dentrix Update Manager makes it easier than ever to keep your Dentrix software up to date. If you have not yet installed Dentrix G5 Productivity Pack 1, install today. Visit www.dentrix.com/g5 for more information about Dentrix G5 Productivity Pack 1 and to get installation helps and system requirements.

DENTRIX®

Tips &Tricks

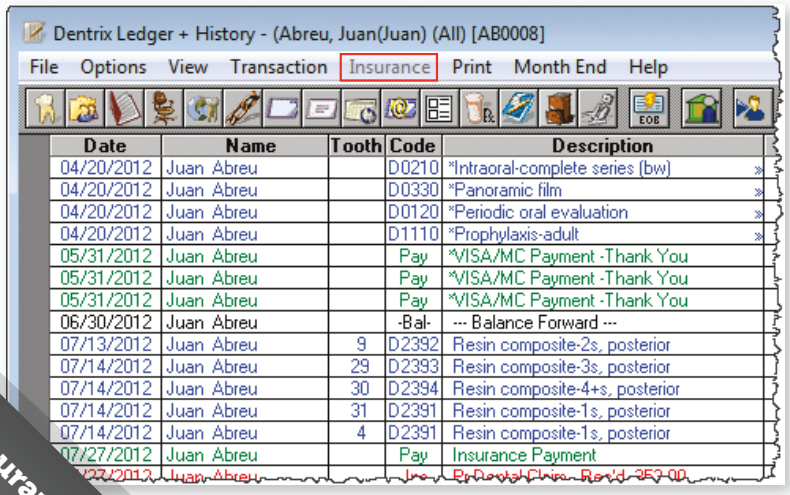
The tips in this section describe valuable but easily overlooked Dentrix features that simplify workflow and increase efficiency. Find the tips that correspond to your role in the practice and try them out today. Start making your job easier and your practice more profitable.

Insurance

Insurance Option Not Available

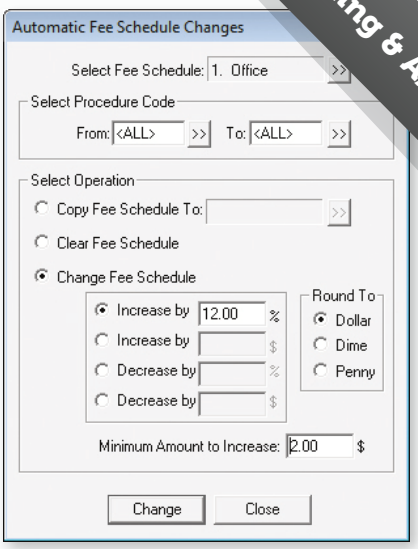
A frequent question received by the Dentrix Customer Support team is, "Why is the **Insurance** menu option in the Ledger grayed out?"

If the **Insurance** menu option is grayed out (see image), it isn't available for use. Usually this means that the patient has not been assigned insurance in the Family File. Once you've added insurance information in the Family File, the **Insurance** menu option will become available for use. If you have assigned insurance information in the Family File and the option is still gray, it probably means that you are viewing the **All (with Running Balance)** option in the Ledger. The **Insurance** menu option is only available when you are viewing the Ledger for a specific patient. Click the **View** menu item and then select a specific family member. Once you're viewing a specific patient, the **Insurance** menu option will become available for use.



Date	Name	Tooth	Code	Description
04/20/2012	Juan Abreu		D0210	*Intraoral-complete series (bw)
04/20/2012	Juan Abreu		D0330	*Panoramic film
04/20/2012	Juan Abreu		D0120	*Periodic oral evaluation
04/20/2012	Juan Abreu		D1110	*Prophylaxis-adult
05/31/2012	Juan Abreu		Pay	*VISA/MC Payment -Thank You
05/31/2012	Juan Abreu		Pay	*VISA/MC Payment -Thank You
05/31/2012	Juan Abreu		Pay	*VISA/MC Payment -Thank You
06/30/2012	Juan Abreu		-Bal-	--- Balance Forward ---
07/13/2012	Juan Abreu	9	D2392	Resin composite-2s, posterior
07/14/2012	Juan Abreu	29	D2393	Resin composite-3s, posterior
07/14/2012	Juan Abreu	30	D2394	Resin composite-4+s, posterior
07/14/2012	Juan Abreu	31	D2391	Resin composite-1s, posterior
07/14/2012	Juan Abreu	4	D2391	Resin composite-1s, posterior
07/27/2012	Juan Abreu		Pay	Insurance Payment
07/27/2012	Juan Abreu		Ins	By Dental Claim Rec'd 252.00

Billing & A/R

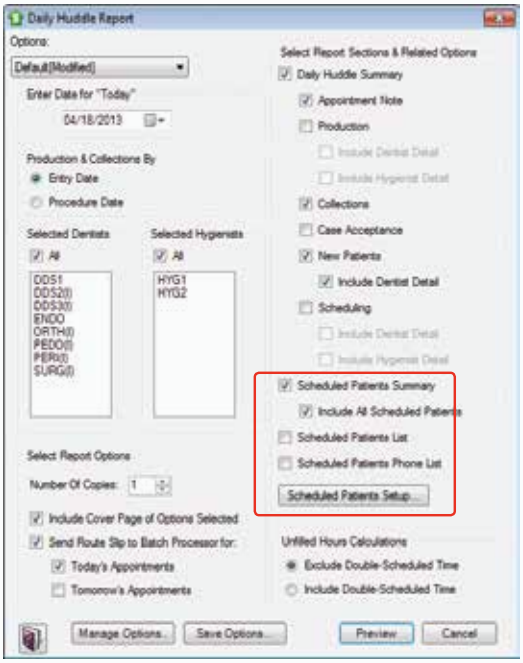


Updating Office Fees

You can save time when you use the **Automatic Fee Schedule Changes** utility to change an entire fee schedule rather than editing one fee at a time. You can choose to increase or decrease the fees by a dollar amount or by a certain percentage. For more information about using the **Automatic Fee Schedule Changes** utility, see the *Fee Schedule Management* webinar recording in the Dentrix Resource Center.

Scheduled Patients Summary

During your morning staff meeting, the doctor tells you that you have a full schedule today. Every member of the staff is thinking of different questions regarding the patients coming in today: Which of today's patients have no email address on file? Which patients have no insurance? Which patients have an appointment with a lab case attached? Which patients have medical alerts? Which patients have overdue continuing care? You can customize the Daily Huddle Report's **Scheduled Patient Summary** section to include the answers to these and many other important questions, and then use the report to follow-up with patients as they come in for their appointments. For more information, see the "Daily Huddle" topic in the *Dentrix Help*, and click on the sub-topic titled "Scheduled Patients Summary." For information on how to run the report, see the "Running the Daily Huddle Report" topic.



Appointments

Using the Presenter

Have you ever tried to explain a procedure to a patient only to get a "deer in the headlights" look in response? Try using the Presenter module in Dentrix to show patients instead. The Presenter includes default patient education topics for many of the most common procedures performed in a dental office. When you treatment plan a procedure in the Patient Chart or Treatment Planner, the appropriate patient education topics are automatically added to the patient's case presentation in the Presenter. You can customize the procedure codes associated with certain topics and view, add, or remove the procedure code associations for any education topic in Dentrix at any time. For more information about associating procedure codes with patient education topics, see the "Increasing Case Acceptance with Compelling Patient Education" article from the Summer 2010 issue of *Dentrix Magazine*.

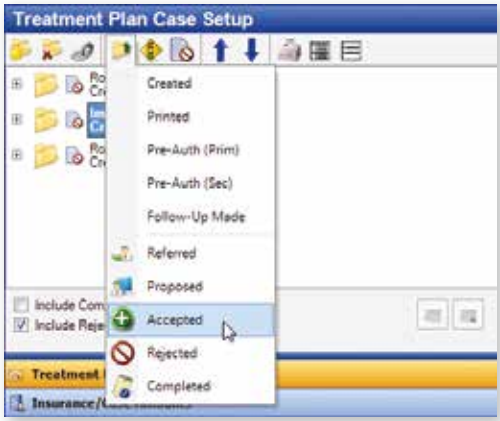
Treatment Planning

Tips &Tricks

Treatment Planning

Organizing Treatment Options

With the Dentrix Treatment Planner you can organize treatment-planned procedures into alternate cases to provide patients with different treatment options. Once you have presented the options to your patient, you can change the status of the case to show which case has been proposed, accepted, referred, or rejected. When you change a treatment plan's case status to **Accepted**, the alternate linked case's status is automatically changed to **Rejected** and no longer appears in the Patient Chart or the **Treatment Plan** view in the Ledger. To learn more, see the "Creating Alternate Treatment Plans" article in the Summer 2010 issue of *Dentrix Magazine*.

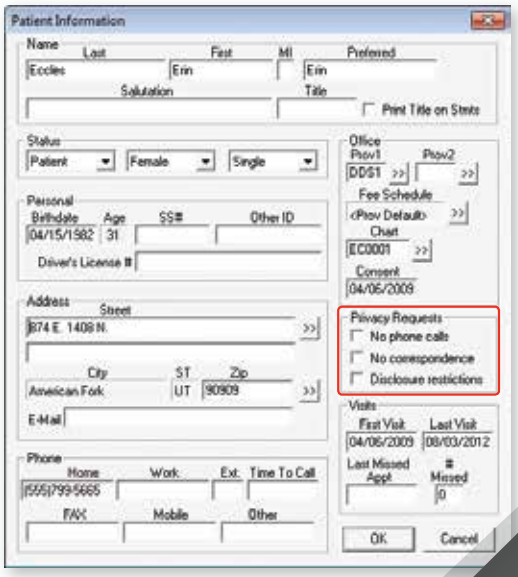


Privacy Requests

You've probably seen those **Privacy Request** fields in the Family File a million times, but do you know what the options mean and what happens in Dentrix if you check the box(es)?

- **No Phone Calls**—Select this option if the patient does not want to receive any phone calls. In Dentrix, <PRIVATE> displays anywhere the patient's phone number is supposed to display.
- **No Correspondence**—Select this option if the patient does not want to receive letters, e-mails, or other correspondence.
- **Disclosure Restrictions**—Select this option if the patient does not want information submitted via the Internet when referred to another doctor.

When you select any of these options and click **OK**, Dentrix gives you the option to create a patient alert for these requests. Additionally, in the Family File, the term **Privacy Requests** appears in red, and on the title bar of other modules to help you quickly identify patients who have privacy requests.



Patient Information

The Auto-State Button

Did you know that you can reduce the number of mouse clicks it takes to chart treatment by using the **Auto-State** button? The **Auto-State** button acts like the **Caps Lock** button on your keyboard by allowing you to chart treatment with the same status without having to individually select a status for each procedure entered. Before you begin charting treatment, click the **Auto-State** button to activate it. You'll know it's activated because the background of the button will turn orange. Then select the status (Existing Other, Existing, Treatment Plan, or Completed) you are charting. Now each procedure that you post will be posted with the status you selected until you either deactivate the **Auto-State** button, or until you select a different status. No more clicking a tooth, clicking a status button, clicking another tooth, clicking the same status button again—over, and over, and over again.

Charting

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Make It Personal

Use the Latest Communication Tools to Connect with Your Patients

Erin Brisk, Contributing Editor

It's difficult to overstate the importance of developing strong relationships and maintaining consistent contact with patients. These close connections keep patients coming back for regular checkups, build the trust they need to follow your recommendations and complete their treatment plans, and reduce the number of missed appointments and empty chairs.

In today's world, building and maintaining these productive relationships requires more than occasional handwritten reminder postcards and follow-up phone calls. Thanks to email, smartphones, and the Internet, people communicate differently than they used to. They have higher expectations. And if you're not taking full advantage of the latest communication tools and technologies, you're probably not communicating with your patients as effectively as you could be.

Of course, these new ways of communicating introduce both opportunity and challenges for your practice. On the one hand, email, texting, and the Internet offer faster, more interactive ways to stay in touch with your patients. On the other hand, they can complicate your communication efforts, which can lead to more busy work for your staff and confusion for your patients.

So how can you leverage all of today's best communication tools to build stronger relationships with your patients—without adding busywork and complexity? And how do you make all of these different communication options work together to become part of a unified, seamless experience rather than a confusing barrage of disjointed messages?

The answer is to use Dentrix Communication Manager. With Communication Manager, you can implement a new kind of patient reminder strategy that focuses on automating, managing, and unifying all of your patient communication tools—from postcard mailers to emails and two-way text messages. This centralized approach allows you to combine the unique strengths of many different communication methods into one seamless experience that will keep your patients connected to your practice through the tools they depend on most.

Consistent Messaging on an Integrated Timeline

With Dentrix Communication Manager, all of your communications are created and managed from the same place, ensuring that your patients receive consistent messaging on a consistent timeline. And because all of the communications are integrated, when a patient confirms his or her appointment at any point during the reminder cycle, other communications about the same appointment won't be sent. That way, patients aren't overloaded with postcards, emails, or text messages about the same appointment.

The integration doesn't end there. When patients confirm their appointments via an appointment reminder, the appointment status is automatically updated in the Appointment Book. To make the most of this feature, it's a good idea to customize your appointment statuses in Dentrix when you start sending patient communications so you can see that the appointment was confirmed via one of your appointment reminders.

To customize appointment statuses, open the Office Manager and click **Maintenance > Practice Setup > Definitions**. Select **Appointment Status** from the drop-down menu. Add a status that will indicate to you that an appointment was confirmed from an appointment reminder. Once you've created your new status, open eSync and click **Appointment Statuses**, then specify that you'd like to use the new status when appointments are confirmed electronically.

A Fresh Take on Traditional Postcards

Traditional postcard mailers still serve a valuable purpose—even in the Internet age. They allow you to communicate with your entire patient base. But creating and mailing them doesn't have to take a lot of extra time and effort. Dentrix Communication Manager can simplify the process by automatically creating and sending attractive, professional postcards to notify patients whenever they're scheduled for a visit. An automated and "outsourced" fulfillment model means you never have to keep an expensive supply of postcards in your office or spend valuable time preparing, addressing, and mailing them.

Figure 1 With postcards, you can give your patients the familiarity of printed reminder cards with the convenience of electronic reminders.

And postcards don't have to be old fashioned. Thanks to QR codes printed on the postcards, you can send interactive postcards that allow patients with smartphones to confirm their appointments, get directions, and automatically update their calendars with a quick, simple scan (Figures 1 and 2).

Figure 2 Once patients scan the postcard QR code, they can confirm their appointment, add the appointment to their calendar, call your office, or get directions to your office.

For more information about setting up postcard campaigns, browse to www.dentrix.com/resource-center and log in to the Dentrix Resource Center. On the **Videos** tab, click **eServices Topics**, then click the link for **Sending Postcard Appointment Reminders**.

Moving Beyond Manual, Text-Only Emails

While you can select a patient's appointment and click the **Send Message** button in the Appointment Book to open a new email message addressed to that patient, it can be a lengthy process to type out the whole message. And all the patient receives is an email message full of text. This kind of communication is time consuming, static, and thoroughly forgettable. Instead, your patient communications should include professional, visually-appealing, interactive emails that are generated and sent automatically (Figure 3).

With emails sent through Communication Manager, your patients can confirm their appointments, update their calendars, set reminders, and even get driving directions to your office by simply clicking a button within

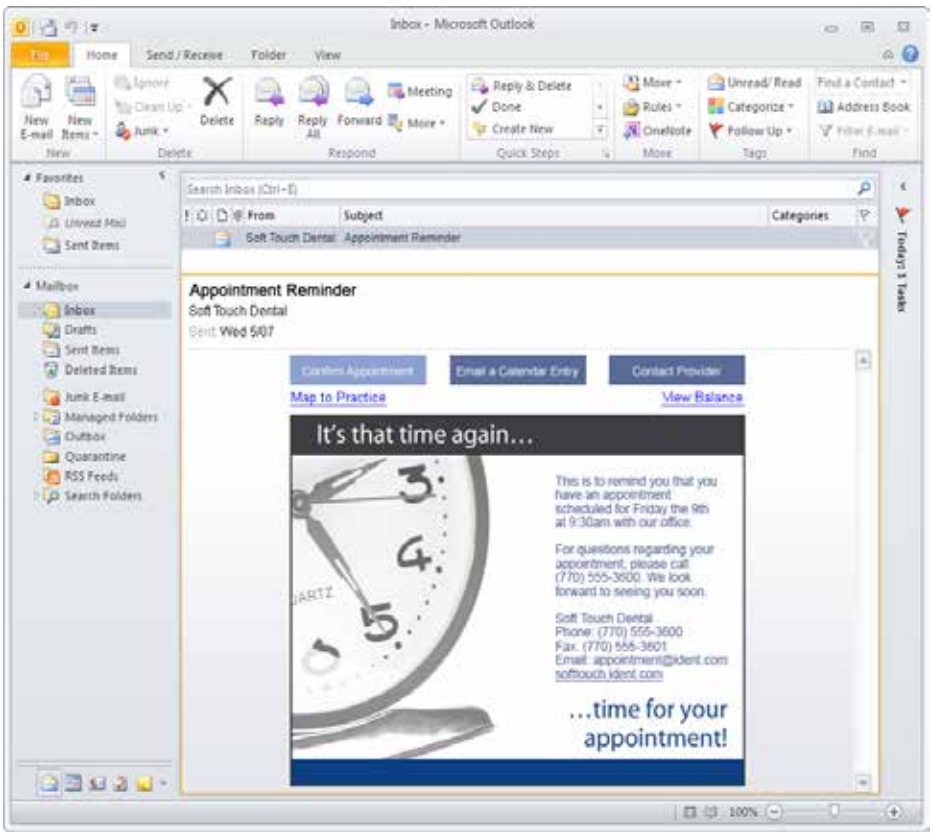


Figure 3 From the interactive reminders patients can confirm their appointment, email a calendar entry to themselves, contact your office, view a map to your office, and log in to your website to view their account.

Figure 4 Once patients scan the postcard QR code, they can confirm their appointment, add the appointment to their calendar, call your office, or get directions to your office.

the email. This rich, dynamic approach to reminder emails can significantly reduce no shows and lower your costs by grabbing your patients' attention early and making it easy for them to respond without calling your office.

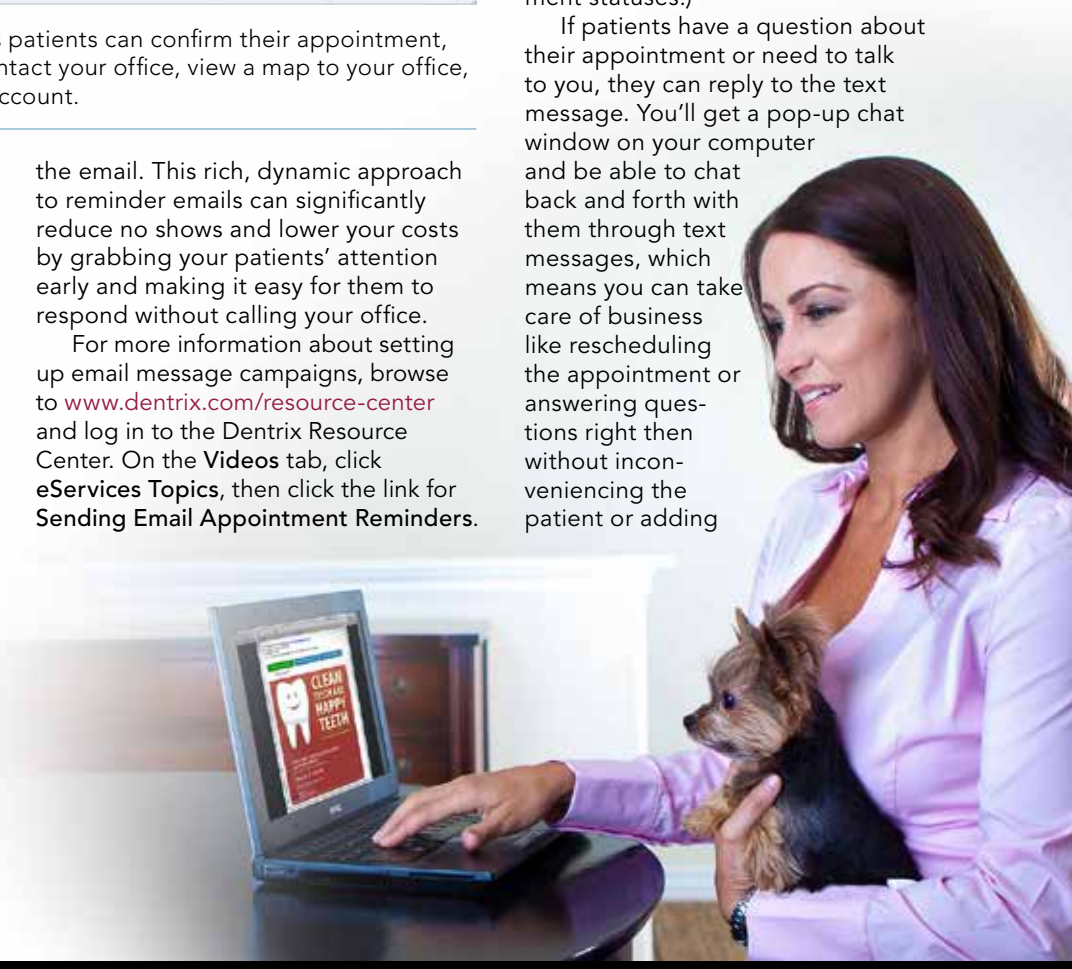
For more information about setting up email message campaigns, browse to www.dentrix.com/resource-center and log in to the Dentrix Resource Center. On the **Videos** tab, click **eServices Topics**, then click the link for **Sending Email Appointment Reminders**.

Quick Connections with Two-Way Texting

Text messaging is fast, convenient, and nearly universal. In fact, on average people read and respond to text messages in less than one minute. This makes texting an ideal method for sending quick reminders to patients before their appointments. It also makes text message appointment reminders convenient for your patients because they can respond and confirm their appointments with minimal disruption to their day (Figure 4).

Not only does Communication Manager allow you to create text message campaigns and specify when text message reminders should be sent (one day before, one hour before, etc.), it also allows you to create completely custom wording for the text message. And when patients confirm their appointment through the text message, the appointment status is automatically updated in the Appointment Book. (See the Consistent Messaging on an Integrated Timeline section for more information about setting up appointment statuses.)

If patients have a question about their appointment or need to talk to you, they can reply to the text message. You'll get a pop-up chat window on your computer and be able to chat back and forth with them through text messages, which means you can take care of business like rescheduling the appointment or answering questions right then without inconveniencing the patient or adding



to the number of phone calls you receive (Figure 5).

For more information about setting up text message campaigns, browse to www.dentrix.com/resource-center and log in to the Dentrix Resource Center. On the **Videos** tab, click **eServices Topics**, then click the link for **Sending Text Message Appointment Reminders**.

Integration with Dentrix

If you want to turn appointment reminders into personal connections with your patients, all of these communication tools should play an important role in your overall patient communication strategy. Since they are tightly integrated with Dentrix, they work effectively together. Customized reminders go out automatically on the timeline you specify based on information in your Appointment Book. Appointment confirmations are updated in your system instantly and automatically. And you never have to manually enter patient information to generate different types of reminders (Figure 6). In other words, all of the pieces work together automatically to keep your patients happy and informed.

Make It Personal with Dentrix Communication Manager

Integrating all of these advanced communication capabilities into your Dentrix workflow makes sense. And it doesn't have to be a difficult, complicated, or prohibitively expensive undertaking. Communication Manager combines all of the critical patient communication tools and capabilities you need. Taking full advantage of all the latest communication technology and personalizing every patient reminder may be easier and less expensive than you think. DM

LEARN MORE

To learn more about Communication Manager, visit www.dentrix.com/communicate or call 1-800-DENTRIX. To learn more about sending postcard, email, or text message reminders, log in to the Dentrix Resource Center at www.dentrix.com/resource-center, click the ***Videos*** *Tab, click the* ***eServices*** *tab, and browse to the eCentral videos section.*

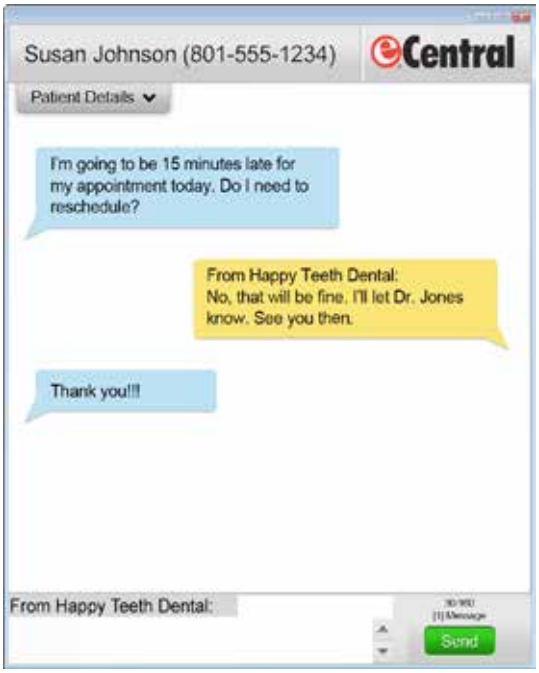


Figure 5 It's easy and convenient for patients to reply to your text message reminders if they have questions. And you can chat back and forth with them and take care of business right then without making a phone call.

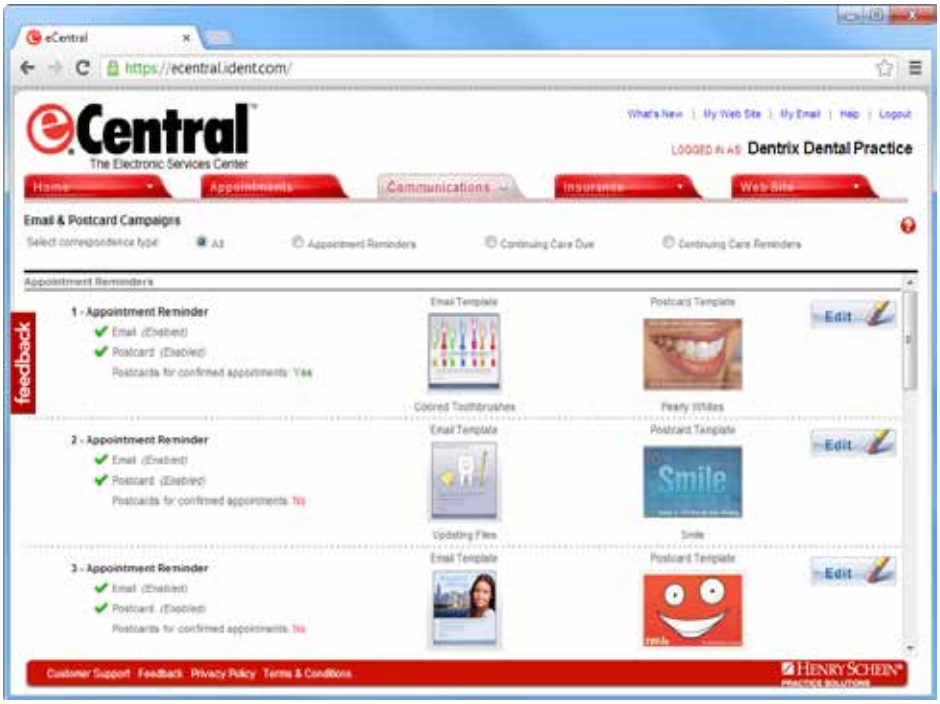


Figure 6 The communication campaigns you set up run automatically based on the information in the Appointment Book, so you don't have to spend valuable time creating manual reminders.

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SECRETS OF A SUCCESSFUL DAILY HUDDLE

WRITTEN BY:

Lois Banta
CEO of Banta Consulting, Inc.

Tammy McHood
Senior Product Manager

"BY FAILING TO PREPARE, YOU ARE PREPARING TO FAIL."

—Ben Franklin

The concept of a huddle, or mini-planning meeting, can be successfully seen in sports teams and in many businesses, including Zappos, Capital One, and the Ritz Carlton, to name just a few. Verne Harnish, author of *Mastering the Rockefeller Habits*, says a daily huddle is a key practice for successful companies. Dental practices are not any different. Taking no more than 15 minutes to communicate with the team provides a sense of community, vision, and clarity that helps everyone on the team focus on key goals and objectives. Put simply, a daily huddle helps you plan for success.

Some practices may say, "We tried daily huddles years ago. We didn't have success at it and we haven't tried again since." If this rings true for you or your team, then it's time for you to learn the secrets to a successful daily huddle which we'll explain with the five daily huddle W's: who, what, where, when, and why.

10 Benefits of Daily Huddles

1. Sets the tone for the day
2. Improves communication
3. Increases quality of patient care
4. Increases patient satisfaction
5. Increases employee satisfaction
6. Increases teamwork
7. Increases accountability
8. Helps fill gaps in the schedule
9. Reduces stress
10. Improves the bottom line

Who to Include

Everyone should be involved in the morning huddle. It is the impetus for a successful day in the dental practice. Each team member, including the doctor(s), has a responsibility and specific role in the morning huddle. It's what prevents the huddle from becoming just a schedule review.

It's normal for some team members to feel a bit reluctant at first, but if the culture of the team encourages everyone to participate, and the daily huddle happens consistently, team members will move past feeling reluctant because they'll see that the benefits of the daily huddle far exceed the initial resistance. Some successful practices that hold daily huddles alternate who leads the huddle, which helps everyone learn to participate.

The Daily Huddle Report allows everyone on the team to see specific information about patients coming in for the day. For example, hygienists can see information such as overdue continuing care information, family members without a future appointment, or unscheduled treatment plans. Financial coordinators can see overdue balances, patients who do not have an email address on file, insurance ineligibilities, or patients without insurance. The Daily Huddle Report can be saved with every team member's preferences, making it easier for each team member to come to the morning huddle equipped with valuable information.

To run the Daily Huddle Report, from the Office Manager's **Analysis** menu, click **Practice Advisor**.

The **Practice Advisor** dialog box appears (Figure 1). Click **Daily Huddle Report**. The **Daily Huddle Report** dialog box appears (Figure 2). Specify the options and details you want to include in your Daily Huddle Report, and then click **Preview**. The report may take a while to generate, but you can continue working in Dentrix while you wait.

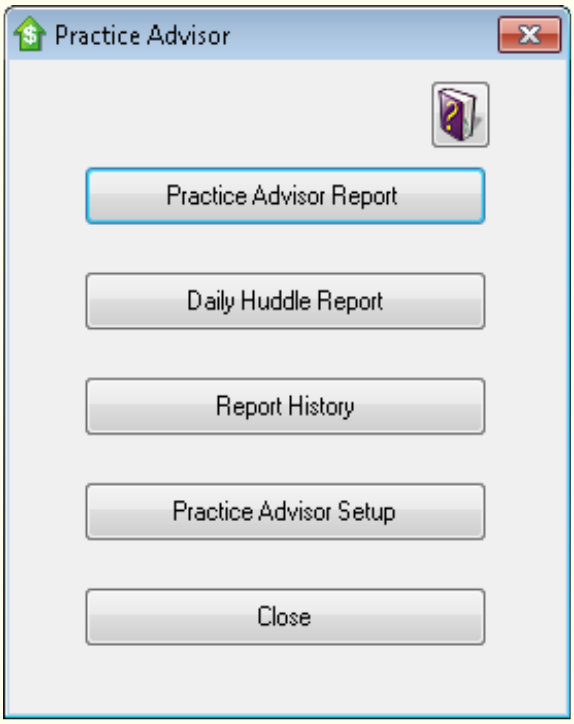

Figure 1 The **Practice Advisor** dialog box.

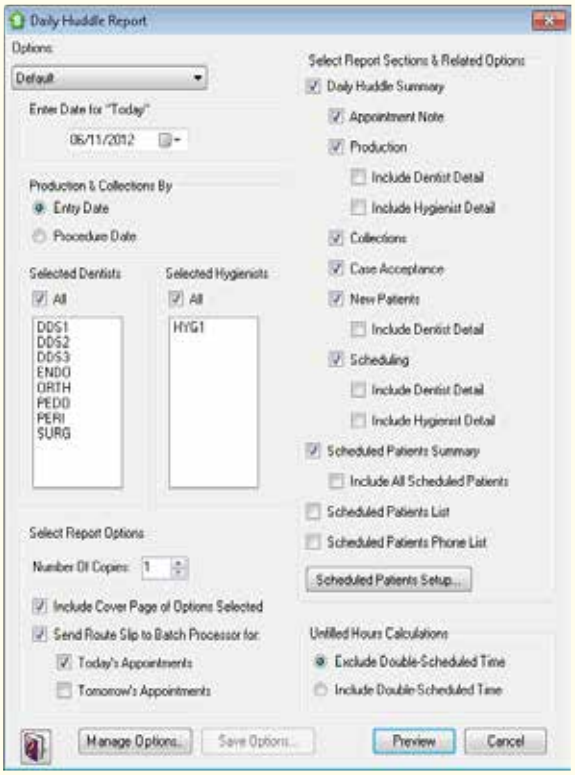

Figure 2 The **Daily Huddle Report** dialog box.

What to Discuss

Have a specific agenda to follow. This keeps the focus on track and creates order as you plan for the day. Create a list of topics to discuss. Be sure to include all areas of the dental practice each day to avoid unnecessary surprises.

The Daily Huddle Report serves two very important purposes. The first is to provide a quick snapshot of how the practice did yesterday, what today is looking like, and a forecast for the rest of the month. This allows you to see on a daily basis how you are progressing toward your monthly goals. The second purpose is to provide valuable information about patients coming in for the day.

Ginger Roberts, office manager at Family & Implant Dentistry in Cincinnati, OH says, "The Daily Huddle Report has transformed our morning meeting. It is so easily customizable, we can get only the information we feel is important for our morning huddle. This report has saved me hours—each week—in the process of gathering information. The summary page is my favorite. All the information is right there at your fingertips!"

The daily huddle is a great time to provide important reminders to members of your team. For example, remind team members that if patients give the practice a compliment, team members should ask the patient for referrals and post their comments on the practice's Facebook page.

Where to Huddle

Huddles should take place in a location where the entire team can easily gather and talk without distractions. It is helpful if the schedule can also be displayed during the huddle for easy reference. For example, the huddle can take place in the break room with a flat-screen TV displaying the schedule for the day. If this is not possible, you can print copies of the Daily Huddle Report for team members so they can review today's schedule as well as the key performance indicators for yesterday. Some practices choose to have their huddle standing up to help keep the meeting short and focused.

6 Tips for Successful Daily Huddles

1. Let leaders lead. Having the doctor attend and participate in the daily huddle is essential. Even if the doctor doesn't lead the huddle, he or she can help reinforce key concepts or the culture of the practice throughout the meeting.
2. Leverage the 21-day rule. Give the daily huddle time to become part of the practice's daily routine. Some behaviors, if repeated 21 days in a row, can easily become a habit. Give your morning huddle at least one month to become second nature. Most practices start to realize the benefits of the huddle in less than a week. Remember, change isn't always easy, but if you're not challenging status quo, you are not changing status quo.
3. Keep it short and start at an odd time. The most effective daily huddles take less than 15 minutes. Some practices find that starting at 8:03 a.m. instead of 8:00 a.m. increases the team's on-time attendance.
4. Start with a quick motivational thought, idea, video, ritual, etc. It can be as simple as a quote or thought for the day.
5. Keep it casual and fun. If your huddle is too formal, team members may feel like it's just another meeting instead of feeling like they belong to a passionate community committed to creating raving fans through excellent patient care.
6. Be transparent. Practices that have open and honest communication reach their potential easier, faster, and with fewer roadblocks.

When to Huddle

The daily huddle is most effective when done before the day begins. Allow at least 10 minutes to discuss the agenda and address potential obstacles. Allow an additional five minutes before the huddle begins for the team to properly prepare for it. And, prepare to wrap up the huddle five minutes before the start of the day to allow the team an opportunity to create a final checklist before the first patient arrives for treatment.

Some practices find that by starting their daily huddle at an "odd" time it increases the on-time attendance of team members. For example, if you normally start your daily huddle at 8:00 a.m., try starting it at 8:03 a.m. instead. You may find that more team members show up for work at 8:00 and are ready to start at 8:03.

The number one reason that practices say they do not have daily huddles is that they simply do not have enough time. However, the Daily Huddle Report automates data collection, saving the average practice at least 60 minutes a day.

Some practices say they don't have daily huddles because not all team members start working at the same time of day. Using the Daily Huddle Report can help overcome that challenge. Simply hold the daily huddle as soon as most team members can be there, and print the report for other team members who arrive later. You can assign someone who attended the huddle to share important details with the absent team members.

Today, for practices to reach their potential, it is almost imperative that they make a daily huddle part of their daily routine. Practices that use the Daily Huddle Report not only save time, but they also have tools to help them reach even greater success throughout their busy days.

Why to Huddle

Reviewing the schedule before the day actually begins allows the entire team to identify potential roadblocks and obstacles during the day. For example, the huddle allows the team to identify patients who can be moved from operative to hygiene, if overdue for a hygiene appointment; hygiene patients with overdue family members; and undone dentistry that can be completed because the patient is already present for another appointment.

The Daily Huddle Report provides valuable patient information so your practice can maximize patient visits. The report shows unscheduled treatments, overdue continuing care, other family members without an appointment, overdue accounts, and much more. There is no better time to have these discussions with patients than when the patients are in your office having face-to-face conversations with team members.

Jim Philhower of Henry Schein Dental says, "One major X-ray missed every day equates to at least a $20,000 loss in annual production." Offices that are using the Daily Huddle Report and the continuing care features in Dentrix are able to quickly identify which patients coming in today need a major X-ray. Not only is this important to production, but even more importantly, it's essential for excellent patient care. Major films are approved by major insurance companies to be taken every three to five years for a reason: they help detect potential problems that proactive treatment can address so that major work, or the loss of a tooth, is less likely to occur down the road.

Management guru Peter Drucker said, "What gets measured gets improved." By using the Daily Huddle Report, practices can plan for more productive days and measure daily progress towards monthly and yearly goals. The daily huddle can be the most valuable 15 minutes in a practice's day. Not having a morning huddle really shouldn't be an option.

LEARN MORE

To learn more about the Daily Huddle Report, see the "Daily Huddle Report" topic in the Dentrix Help Files. *See "How to Learn More" on page 2 for instructions on accessing these resources.*

Lois Banta is CEO, President, and Founder of Banta Consulting, Inc., a company that specializes in all aspects of dental practice management. Lois has over 37 years of dental experience and consults and speaks nationally and internationally. She is also the owner of The Speaking Consulting Network, and a member of the Academy of Dental Management Consultants (ADMC), American Academy of Dental Practice Administration (AADPA), American Dental Assistants Association (ADAA), National Speakers Association (NSA), and American Academy of Dental Office Managers (AADOM). To contact Lois for consulting or professional speaking invitation, call 816-847-2055.

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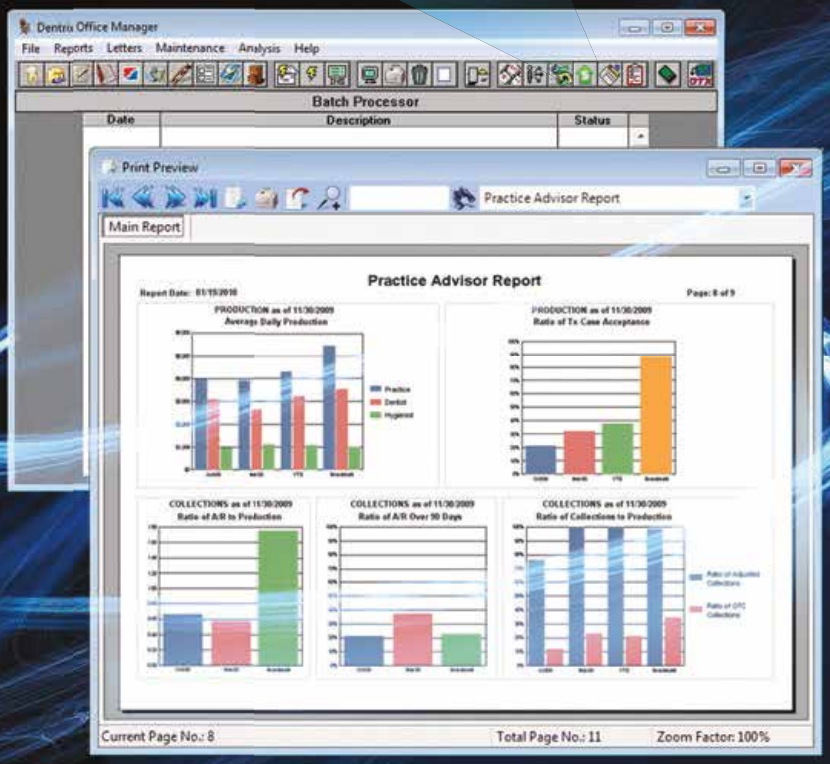

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Manage Your Lab Cases in Dentrix

Learn how to manage your lab cases with the Dentrix Lab Case Manager.

■ **Dayna Johnson** | Certified Dentrix Trainer

Do any of these lab work scenarios ever happen in your office?

- You call to confirm a patient for tomorrow's appointment, but later learn that the lab case is not in the office and you have to reschedule the patient.
- The lab case wasn't delivered by the carrier and you don't have the tracking number.
- You need to fill an opening in your schedule, but you can't fill it until you search the lab case log book to see which cases are back from the lab.
- A lab case you thought was sent to the lab didn't get sent.

Do you wish you had a better system for managing the lab cases in your office? The Dentrix Lab Case Manager can help with all the above scenarios. It is easy to set up, easy to use, and will help you and your team communicate information regarding lab cases easily and efficiently. With the Lab Case Manager, you can see right from the patient's appointment if the case is out or in, see what lab it went to, check the due date, and check the delivery status using the tracking number.

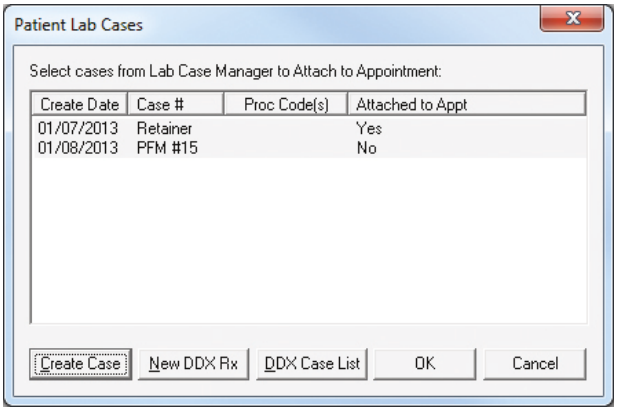


Figure 2 The **Patient Lab Cases** dialog box.

Using the Lab Case Manager

To use Lab Case Manager, you must first set up your labs. From the **File** menu in the Appointment Book, click **Lab Case Manager**. Before Dentrix will allow you to enter a lab, you must first create shade guides and shipping methods that will be attached to the labs. From the **Setup** menu, click **Shade/Guides Shade Setup** and then click **Add**. You can either type "Office Default" or you can type the name of a shade guide. Click **OK**, and then click **Close**.

From the **Setup** menu, click **Shipping Method(s) Setup**. Click **Add**, type the shipping carrier you use (such as USPS, FedEx, UPS, or lab delivery), and specify any shipping options. Click **OK**, and then click **Close**.

From the **Setup** menu, click **Lab(s) Setup**. This is where you will enter the list of labs with which you do business. For each lab, click **Add**, fill in the important information about the lab, and then click **OK**.

I use the Dentrix Lab Case Manager in a very simple way—I check the case out when we send it and I check it in when the lab returns it. Of course Lab Case Manager has more advanced features, but they are beyond the scope of this article.

In the Appointment Book, double-click an appointment to open the **Appointment Information** dialog box (Figure 1). Select the **Lab Case** check box, and then click **Patient Lab Cases** to display the **Patient Lab Cases** dialog box (Figure 2). Click **Create Case**. In the **New Case** dialog box (Figure 3), type the important information for this lab case. Be sure to include the **Lab**, **Shipping Method**, and **Shipping Tracking Number** (if there is one). In the **Lab Assigned Case #** field, type a brief description of the lab case until you receive the actual case number from the lab. You can see in Figure 2 why having

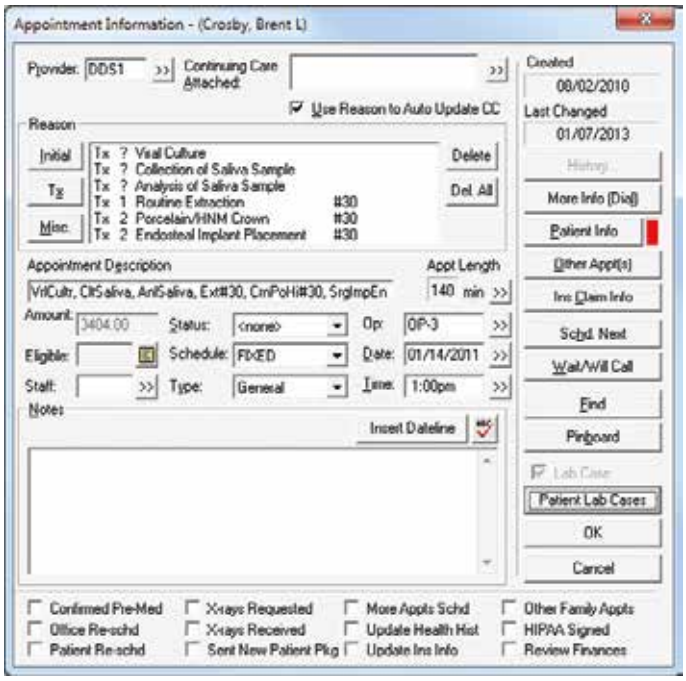


Figure 1 The **Appointment Information** dialog box.

a brief description of the lab case is important. Over time, a patient can have multiple cases. Including brief descriptions will help you select the right case for an appointment. Click **OK**, and then select the case you want to link with this appointment. Click **OK**, and then click **OK** again.

The top right corner of the appointment block now displays a small blue **L** icon with a white background (Figure 4). When the lab returns the case, double-click the **L** icon on the appointment block, double-click the correct case in the list, and click **Receive Case**. If you want to track the **Lab Fee** for this case, you can enter it in the top right corner of the **Receive Case** dialog box. Click **OK**. Now the white background will turn green to let you know that the case is in.

If you need to return the case to the lab for any reason, double-click the **L** icon again, double-click the case number, click **Receive Case**, select **Return Case to Lab**, and then click **OK** twice. The lab icon in the appointment block reverts to a white background so you know you sent the case back to the lab.

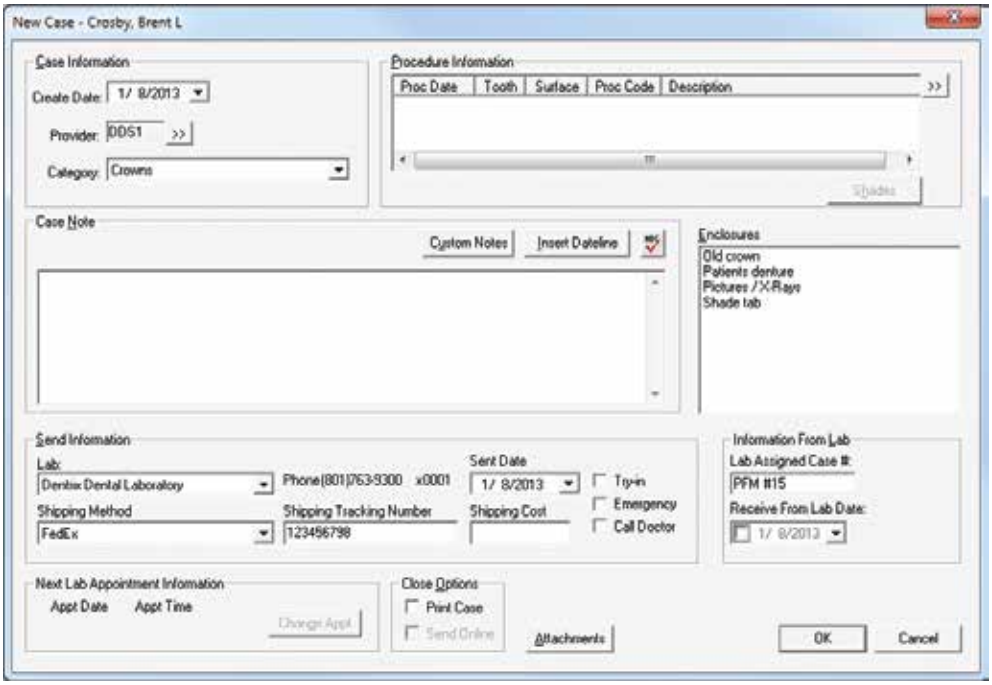


Figure 3 The **New Case** dialog box.

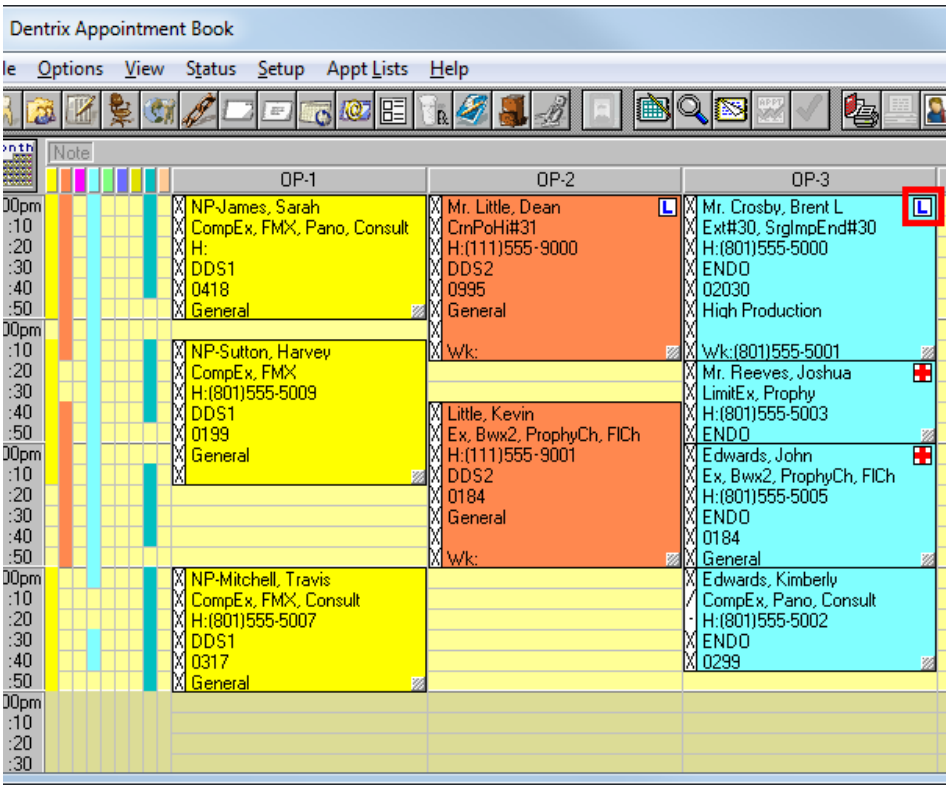


Figure 4 A blue **L** icon means the appointment has a lab case.

Using the Lab Case Manager can save you time, improve your office communication, and help you avoid those embarrassing scheduling goofs. DM

LEARN MORE

To learn more about Lab Case Manager, see the Lab Case Manager topics in the Dentrix Help. *You can also view the "Lab Case Management" webinar recording in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.*

Dayna Johnson, founder and principal consultant of Rae Dental Management, helps dental offices improve patient care, increase collections and reduce staff headaches by implementing efficient management systems. With 18 years experience in the business and technical side of dental offices, Dayna's passion for efficient systems is grounded in both personal understanding and professional expertise. Dayna can be reached at dayna@raedentalmanagement.com or visit her website at www.raedentalmanagement.com.

Adding Medical Alerts to a Questionnaire

Keep patient health histories up to date by adding medical alerts to existing patient questionnaires.

■ **Kim Thornton** | Dentrix Profitability Coach

Updating printed health histories is one of the chores in a dental office that can be really aggravating—to both the patient and you. Maybe only one medical condition has changed or maybe conditions are exactly the same as the last time the patient was seen, but the whole form has to be completed again. Wouldn't it be nice to give patients a form with their existing medical alerts already marked so they only had to indicate changes? By using the Dentrix Questionnaires module to generate patient forms, you can do this and more.

Note for Dentrix G5 Productivity Pack 1 Users: If you've already upgraded to Dentrix G5 Productivity Pack 1, be sure to install any subsequent hotfixes or software updates before you modify any questionnaires as described in this article. These updates include important fixes which apply to the Questionnaires module. Visit www.dentrix.com/support/software-updates/g5.aspx for more information.

Once patient information has been entered into the Questionnaires module, you can use the information to populate fields in Dentrix, such as medical alerts. Best of all, when you need patients to update their health histories, simply have them review the most current form from a computer or kiosk in your office or on your practice website, and ask them to update anything that's changed. Dentrix will grab all the patient's medical alerts, including those that may have been added to the patient's record since the questionnaire was last updated (for example, if a staff member added an alert to Dentrix that the patient forgot to indicate on the paper form), and mark them on the form automatically.

If your existing questionnaires don't include a section pertaining to medical alerts or allergies, you can add these fields to your questionnaire form with a few mouse clicks.

To add medical alerts to an existing questionnaire or to create a new questionnaire that includes a medical alerts section, follow these simple steps.

Click the **Questionnaires** button from the toolbar of any Dentrix module. Then from the **Edit** menu, click **Questionnaire Setup**. A list of questionnaire forms appears.

Select the form you want to add medical alerts to, and click **Edit Form**. If the form you selected has never been used by a patient, a dialog box appears (Figure 1) giving you the options to make changes to your existing form or to create a new form, based on the existing form, for you to edit. After you choose your option, the **Questionnaire Form Setup** dialog box appears.

Figure 1 When editing your questionnaire form, decide how the new form will be saved.

From the **Questionnaire Form Setup** dialog box, click **Insert Patient Info**. The **Questionnaire Patient Info** dialog box opens (Figure 2). Under **Response Type**, select the option for **PI-Medical Alerts**. The medical alerts that are listed here directly correspond with the medical alerts you set up in the practice definitions, and that can be attached to patients in the Family File or Patient Chart. To add this section to the questionnaire, select the check box next to the **PI- Medical Alerts** and then click **OK**. The new medical alerts section is now added to your questionnaire form and will be pre-filled with patient information the next time you print a copy for the patient to review.

If your office is making an effort to go paperless, you can add a medical alerts section to your electronic questionnaires following the steps outlined above, with one additional step. In order for the new form to appear on your website, waiting room kiosk, or tablet device, you will need to perform a websync. (For more information on how to upload new questionnaires to your website or kiosk, view article #46636 in the Dentrix Resource Center.)

By using the Questionnaires module to customize the forms that patients fill out, and by making it easy for them to review the information you already have on file, you can keep patient information such as medical alerts up to date with much less aggravation. DM

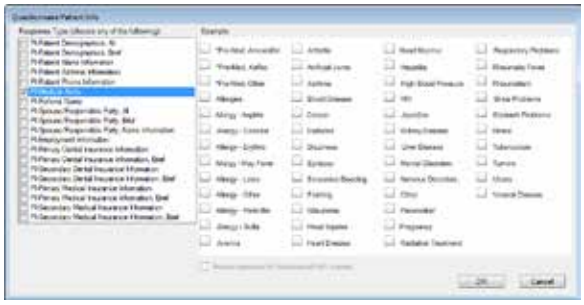
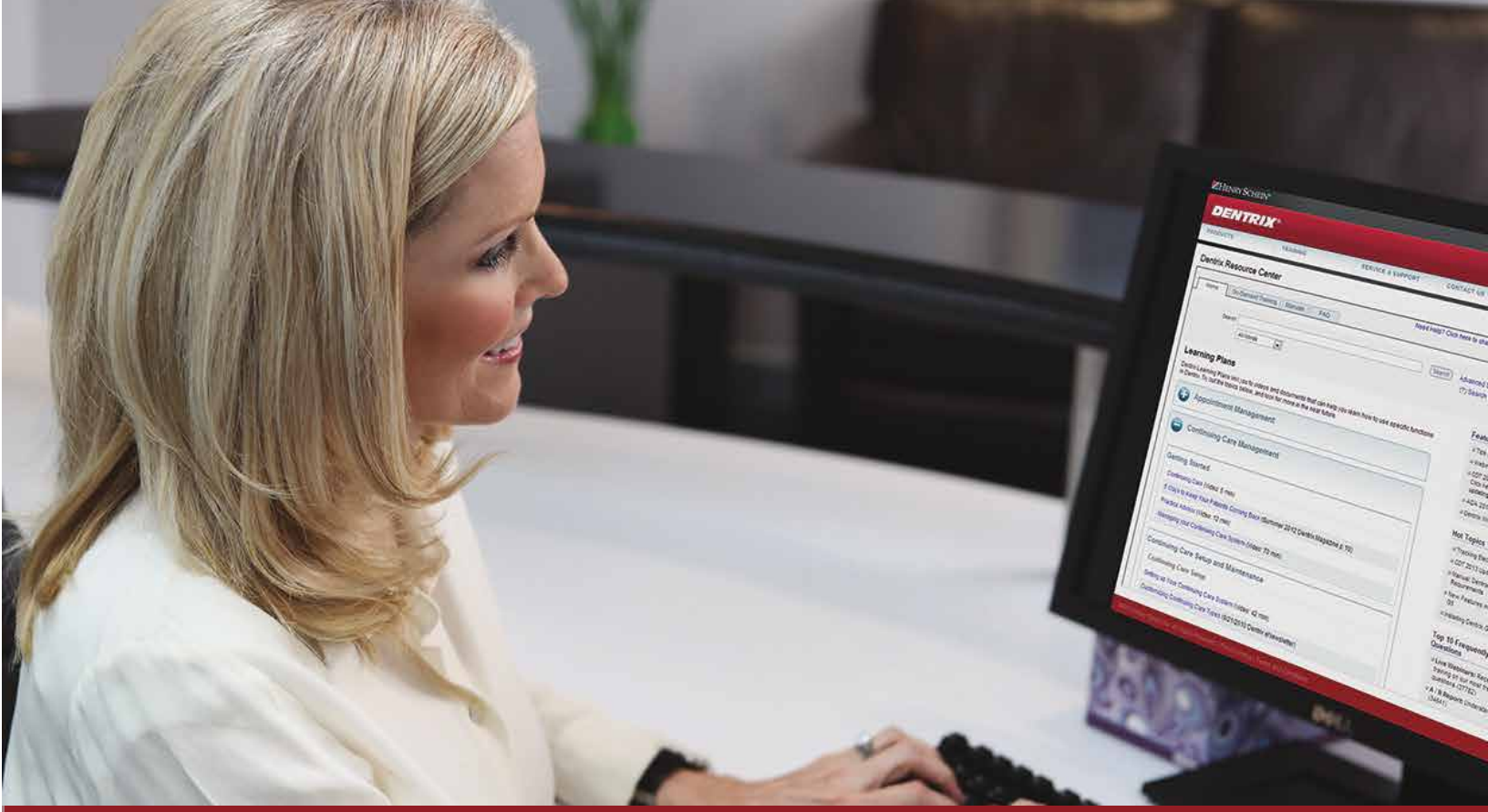


Figure 2 The **Questionnaire Patent Info** dialog box allows you to select the kind of patient information to include on the questionnaire form and shows you an example of how it will appear.

LEARN MORE

To learn more about the Questionnaires module, see the "Questionnaires" section of the Dentrix Help. You can also visit the Dentrix Resource Center to view Questionnaires training videos. See "How to Learn More" on page 2 for instructions on accessing these resources. To learn more about profitability coaching, visit www.dentrix.com/profitabilitycoaching.



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Securing Your Dental Practice from a Credit Card Data Breach

Dental offices are at increasing risk of a data breach. What steps can you take to protect your practice and your patients' credit card information?

■ **Jill Rymarz** | Marketing Specialist

Businesses that have experienced a data breach tend to ask "Why me?" This question can be answered simply with "Because you have something worth taking that is not protected."

In order to have the cash you need to run your business, you need to collect as much money as possible as close as possible to the time of service. When you're dealing with patients, create and enforce a sound, written policy that describes the cost of the procedure, the anticipated insurance contribution, and the patients' out-of-pocket obligation. A written agreement between the doctor and the patient is an absolute necessity that will allow for simplified, stress-free collection of the patient's up-front, out-of-pocket expense.

Data security breaches are in the news now more than ever, often where millions of credit card numbers have been stolen or compromised. What you don't hear about is that these breaches are happening at small and medium-sized businesses that process payments online, by mail or in person—dental offices included. There's a common misconception that small businesses are not a data breach target simply because of their size. What can you do to secure your patients' credit card information and protect your dental practice against a data breach?

The Risk of Non-Compliance

The damage to a dental office's reputation and the harm to patient relationships can be irreparable. In 2012, approximately 91 percent of all data compromise cases came from small businesses that process less than 20,000 transactions annually.[1]

With automated tools that even amateurs can use to discover unprotected cardholder data over the Internet, along with a burgeoning black market providing financial incentives to malicious individuals to steal that information, payment card acceptance can put dental offices at risk.

Fortunately, the five major card networks (American Express, Discover Financial Services, JCB, MasterCard Worldwide, and Visa Inc.) established a security standard for all entities that process, store, and transmit cardholder data. The standard is the Payment Card Industry Data Security Standard (PCI DSS) that guides organizations in protecting the cardholder information they process, transmit, or store. The PCI DSS is a set of data security best practices that can give any business a stronger defense against credit card theft and fraud. This is especially true for the dental industry due to the sheer number of credit card transactions an office may run in the normal course of business.

Payment Cards: Convenient for Patients . . . and Crooks

The ability to store credit card data in compliance with PCI DSS is one of the greatest benefits of using Dentrix PowerPay. But even if your dental office does not store patient credit card information, you are still at risk. A connection to the Internet anywhere within your network can serve as the artery through which a malicious individual armed with the proper tools (many available for free on the Internet) can extract cardholder information. Through their investigations of payment card compromises in 2012, Trustwave found that 96 percent of all data targeted is customer records, including payment card data, personal identifiable information, and email addresses.[2]

A payment card breach does not bode well for a dental office's reputation. Not only will accusations of incompetence fly, the breach will also inconvenience patients as they deal with the repercussions. They must examine their payment card statements for erroneous charges, cancel their card (or multiple cards), and cope with a frozen account until their card is re-issued.

Because the card brands require that every entity that processes,

How a Cardholder Data Breach Can Impact Your Practice:

- Damage to your practice's reputation
- Termination of ability to accept payment cards
- Investigation and remediation costs
- Fines and fees
- Fraud losses
- Legal costs, settlements, and judgments
- Going out of business

Did You Know?

- If compromised, the card brands may expel a merchant from their payment card network, prohibiting them from accepting payment cards.
- A compromised merchant is responsible for the costs associated with the investigation of the compromise as well as applicable fines for non-compliance.

stores, or transmits cardholder data comply with all 12 requirements of the PCI DSS, they will issue fines if an investigation of the compromise determines that a dental office was not in compliance with the PCI DSS at the time of the breach. Suffering a breach could result in fines ranging from $10,000 to $50,000 per incident, loss of credit card acceptance rights, and loss of patient confidence.

Takeoff: Embarking on Your Compliance Journey

In an effort to help PowerPay and PowerPay LE customers comply with PCI DSS, Henry Schein Practice Solutions has partnered with Moneris and Trustwave, a leading provider of security services and PCI DSS compliance validation tools, to create the Moneris PCI Program. The PCI Program features Trustwave's TrustKeeper PCI Manager, which will help you easily navigate the requirements of the PCI DSS. Since dental offices typically don't have an in-house IT department, PCI Manager was designed with businesses like yours mind.

TrustKeeper PCI Manager provides a personalized compliance validation service for dental offices of all sizes. TrustKeeper PCI Manager removes the complexity of PCI and allows you to focus just on the tasks that are relevant to your specific business environment. PCI Manager will guide you through the validation process and provide information and resources so you can get secure—and then get back to business.

Key Features of PCI Manager for Dental Offices

PCI Wizard and To Do List: Trustwave's intelligent PCI Wizard helps simplify the PCI certification compliance process, walking you through step-by-step until you are compliant. The To Do List clearly and simply tracks security gaps that need action in order to pass and become compliant and provides several ways to resolve each item.

Online Education: Trustwave found that 87 percent of businesses that have been breached did not have security policies, including security awareness education programs.[3] TrustKeeper's Security Awareness Education is a valuable tool to help educate your staff on the security risks relevant to their everyday duties. From a HIPAA overview to PC and Web browsing security, the Security Awareness Education program meets the requirements of all common compliance organizations by delivering up-to-date training that targets the right audience with the right content. The online, self-directed modules break down each step of the compliance process and enable employees to work at their own pace.

Security Policy Advisor: TrustKeeper has several security policy document templates to help you build your own policy documents, helping you to certify with specific PCI requirements regarding documented procedures. Supporting documents are also available to help implement the security policies you adopt.

Vulnerability Scan Management

If you are required to perform scanning as part of your card-processing environment, TrustKeeper's scan engine is integrated into the process. An easy-to-use wizard facilitates scan setup and management, and scan reports are easy to digest and address.

For more information on how to begin the process of becoming compliant and to register for the Moneris PCI Program, please visit https://pci.trustwave.com/moneris-powerpay. Put your risk to rest by taking the first step to securing your dental office from the threat of cardholder data breach. **DM**

Jill Rymarz is a marketing specialist for Trustwave. She has in-depth experience working with banks and payment service providers to help merchants protect their customers' cardholder data and achieve PCI DSS compliance. Jill works directly with Henry Schein on the Moneris PCI Program, helping dental offices become secure using PCI DSS best practices. Jill holds a Bachelor of Business Administration with a focus in marketing from the University of Iowa.

Notes:
[1] Source: Trustwave 2013 Global Security Report, https://www2.trustwave.com/2013GSR
[2] Source: Trustwave 2013 Global Security Report, https://www2.trustwave.com/2013GSR
[3] Source: Trustwave 2012 Global Security Report, https://www2.trustwave.com/2013GSR

TechCentral Talks Internet Security

Use these tips and suggestions to help you manage your practice's Internet security.

■ **Brian Calverley** | National Field Operations Manager, Henry Schein TechCentral

At Henry Schein TechCentral, we get questions from many Dentrix customers who understand the advantages of providing Internet access throughout their practice but are also concerned about the risks. When we assess an office's network, we often find practices that rushed to provide Internet access for their staff without taking the steps necessary to protect their practice. This article offers a few tips and suggestions to help you manage your practice's Internet security.

Keep an Eye on Internet Use

Every practice should have a well-defined Internet usage policy. You can find simple policy statements on many Internet sites, including About.com (see humanresources.about.com/od/policiesandsamples1/a/email_policy.htm). Many practices are also adjusting their staff Internet use policies to cover how smartphones, tablets, and other web-enabled personal devices are used within the office.

When clearly communicated, these policies maintain staff focus, productivity levels, and your practice's professional image. After all, your receptionist is there to greet and serve customers, not update her personal Facebook status. It's also wise to have each team member sign an acknowledgment that they have received a copy of your Internet use policy and will abide by it.

Fortify Your Firewall Protection

Keeping business PCs dedicated to business is good policy and reduces your chance of Internet nasties being downloaded and infecting the computers that run your office. But in addition, you need to have network security precautions in place to shore up your defenses.

One of the most overlooked security components is the Internet firewall. Many offices trust their Internet service provider (ISP) for this important component. However, not every provider offers adequate firewall protection. The all-in-one modem/router/firewall/kitchen sink appliance that ISPs provide does not usually include the state packet inspection (SPI) necessary to truly secure your network from hackers.

Set Up a Strong Filter

Malware and viruses can wreak havoc on your computer network, and up-to-date antivirus software is typically enough to protect you from these threats. But did you know that there are additional, inexpensive options for preventing threats from ever reaching your desktops?

In the past, Internet filtering software and services were clunky, overly intrusive performance hogs. Today, these software and services are worth a second look. One option is OpenDNS. OpenDNS and similar systems intercept requests for inappropriate or malicious websites and prevent devices from accessing these sites. The online protection can be managed by blocking sites categorically or by banning or allowing individual websites.

More sophisticated options are available from TechCentral for minimal cost. In general, these services provide more complete protection and security. One of the great things about these DNS-based systems is that they are device- and operating system-independent. This means the protection extends across any Windows or Mac desktop computer, as well as smartphones and tablets, preventing staff and patients from accessing inappropriate content from your wired and Wi-Fi networks. Web filtering is a must-have for any practice offering public Wi-Fi.

These services also commonly provide reporting that can be useful to employers who want to track employees' productivity. These reports typically show websites visited along with the dates and times of access.

Take the Risk Out of Remote Access

Another often-overlooked security component is secure remote access to your network. Choosing to open up a port on your network firewall in order to allow remote connection may not be the best choice when it comes to security. (A firewall is like a fortress wall around your practice's network, and a port is like a gate through that wall that can provide access to both friend and foe.)

Applications such as Windows Remote Desktop (port 3389) and PCAnywhere (port 5632) are common targets for hackers trolling the Internet. Hacker programs are used to "troll" for open ports and then activate brute-force or social-media based attacks, to hack into these ports.

There are much more secure options than poking holes in your firewall when it comes to remote access. Two such options are using an online remote access service or connecting via a secured virtual private network (VPN) connection.

Online options such as LogMeIn (www.logmein.com) are good for occasional access. If you need to authorize multiple users or want better remote performance, you should consider a secure VPN. Unless you have high-level computer skills, a trusted professional such as Henry Schein TechCentral should set up and assist with your VPN.

Turn to TechCentral for Answers

Proper planning and working with an IT provider that understands the importance of Internet security allow you to safely take advantage of all the benefits a connected practice offers. Make sure you understand and manage these risks, especially if you are like most offices and rely heavily on the Internet for business processes and patient communication.

Remember that Henry Schein TechCentral specializes in assisting clients on every step of their technology journey. For more information about TechCentral and what it can do for your practice, visit www.henryschein.com/techcentral. **DM**

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DENTRIX® G5 CONNECTED SOLUTION SPOTLIGHT

Practice SafeGuard and Dentrix:
Detect Fraud and Protect Your Financial Assets

Donald P. Lewis | DDS CFE and David E. Sems, CPA CITP CFF

Learn how Practice SafeGuard™ can help you monitor your practice's financial data and prevent workplace fraud.

When Dr. Albright* of Florida discovered Practice SafeGuard™ at the 2012 Florida National Dental Conference, he was relieved to find a solution to the nagging concerns about workplace fraud he'd felt for years. He instantly signed on to become an early adopter.

I installed (Practice SafeGuard) basically as a courtesy, because we're a stable, well-oiled machine, and I was interested in helping out as a control beta. I did not anticipate major issues with our data. When the reports started coming back, I was blown away to discover that I've lost over $40,000 since 2011.

"I didn't know whether fraud was an issue in my office, but I had seen ledger mistakes costing us money over the years. I just had no way of discovering how much," Dr. Albright says. "We responded to one-off problems that were solvable after they occurred, but I needed patterns and data I could use to prevent errors from happening. After seeing the Practice SafeGuard preview, I was excited that one team could accomplish this."

Dr. Ball* of Ohio installed Practice SafeGuard with the goal of monitoring mistakes and running various transaction reports. "I found some serious discrepancies in our patient payments compared with bank deposits, but I had nowhere to turn to find out more. We were already running Dentrix G5, so Practice SafeGuard was a no-brainer for us. The insight we've gotten in just a few weeks is just incredible."

Dr. Call* of Ohio was devastated to discover his losses were fairly extensive. "I installed (Practice SafeGuard) basically as a courtesy, because we're a stable, well-oiled machine, and I was interested in helping out as a control beta. I did not anticipate major issues with our data. When the reports started coming back, I was blown away to discover that I've lost over $40,000 since 2011."

Situation Analysis

According to an HSPS Fraud & Embezzlement Survey in 2012, an astonishing 72 percent of 2000+ dentists are "reasonably certain they are currently victims of fraud." This overwhelming response indicates a serious and troubling gap that dentists must fill to protect their incomes. The response to this survey also prompted our Practice SafeGuard team to get the application we'd dreamed of for years ready to share with customers. For years, the one huge problem that nobody could solve was how to respond instantly to potential issues. The technology just wasn't there; even tightly controlled practices would retroactively turn up losses in their audit trails.

This year we helped Dr. Albright install Practice SafeGuard to use with Dentrix G5. Practice SafeGuard showed us previously undiscovered losses on the first day. In less than two months with Practice SafeGuard, we've found $33,000 in losses since 2009.

Dr. Albright's practice is exactly like tens of thousands of others: they are not negligent or complacent; they just haven't had access to the right financial tools until now.

Behavior Red Flags You Haven't Considered

With no end of motivators to commit crimes, and myriad behaviors that indicate crime may be happening, it can feel daunting to look for negative behavior patterns on your team, particularly if you have long-term staff you love like family.

To be effective, you'll have to start by admitting that no one is above suspicion. Everyone's current situation in their lives should be questioned, and it should be understood that motives and opportunities to steal can change all the time. Changes in environmental pressure can make an opportunity to skim look too good to pass up. Here are some lesser-known behaviors to consider in evaluating your vulnerability to employee embezzlement. Any employee could be running schemes if:

1. They proactively "help out" with financially-related tasks outside their job description.
2. They control or acquire end-to-end financial tasks like patient check-out and bank deposits.
3. They generate (and can filter) your daily financial reports.
4. You don't perform random patient chart audits weekly at minimum.
5. They haven't asked for a raise in a year or more.

If one or more of these apply, don't overreact, but schedule role reviews at once, and start asking questions. Loyal staff members will appreciate your interest in their position, and you can take the opportunity to make sure these people stay happy in the right role.

How It Works

Practice SafeGuard works by applying well-known "rules" of financial fraud detection to your Dentrix G5 data to extract violations or deviances. It also scans your Dentrix G5 Ledger history for the past six months and aggregates deviations from your service fees to identify extreme and unusual transactions.

The Practice SafeGuard software does not appear in the daily functions of the Dentrix G5 interface. This is critical to avoid alerting personnel that workflows are being evaluated. It simply notifies assigned users, as often as you specify, when a potential issue occurs, and logs the response for documentation. Practice SafeGuard can send alerts to any email inbox, and is optimized for usage on iPhone and Android phones and iPads. Each basic Practice SafeGuard package includes three users and six months of history, so doctors, accountants, and trusted staff can monitor and respond to alerts instantly, from anywhere, with records of all activity.

"At first, it felt like a lot of information, but we quickly found that the Practice SafeGuard dashboard shows detailed explanations of each violation type, and recommendations on how to respond," says Dr. Ball (Figure 1). "I was worried about getting flooded with nonissues, but I just receive a daily tally and look through things as I can. Anything we miss stays open in the dashboard, and we can easily clear it once we have a resolution. We also export certain issue types into a report that we provide to our Dentrix trainer to address with our staff."

Conclusion and Next Steps

Practice SafeGuard is now available to all Dentrix G5 users who are interested in participating in our Early Adopter program. At $50 for monthly monitoring and $149 to install, the low pricing takes into consideration the investment our first partners make, working alongside us to make financial security what it should be for doctors. Early Adopter packages are good for life, but they won't be available for long. Visit www.PracticeSafeGuard.com to become an Early Adopter today. DM

(*Real names withheld)

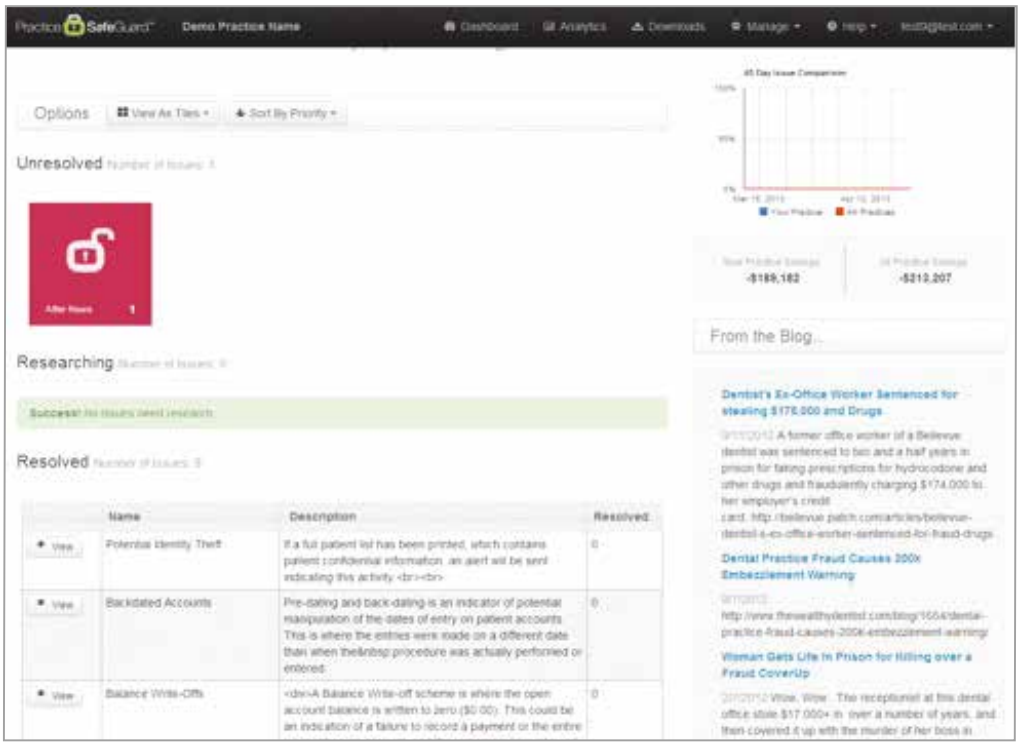

Figure 1 A preview of the alerts and information in the Practice SafeGuard dashboard.

Donald P. Lewis, DDS CFE is the founder and CEO of PATedLLC, the developers of Practice SafeGuard, and is currently in private practice as a leading oral and maxillofacial surgeon in Cleveland, Ohio.

David E. Sems, CPA CITP CFF is PSG team's chief investigator, with stints leading global forensic technology investigations at Ernst & Young, and lecturing at the Institute of Internal Auditors (IIA) and the Federal Bureau of Investigation (FBI).

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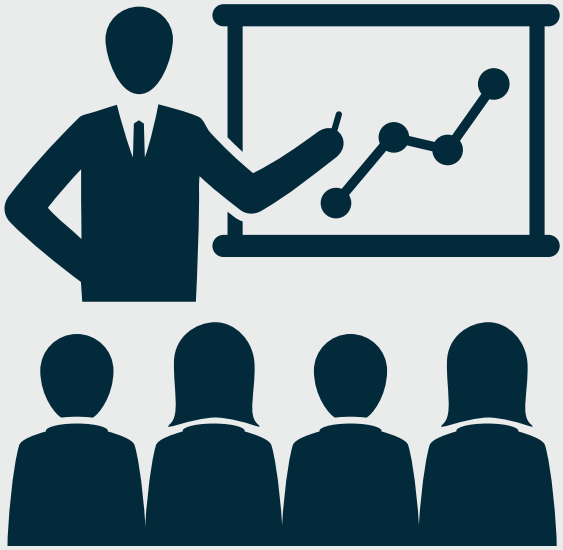

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*Based on registration data from 5/31/13.

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