

dentrix

MAGAZINE

How to Manage Your Practice in Today's Economy

Learn what top management consultants recommend and how to do it with Dentrix, page 10

Grow Your Practice with Patient Referrals

page 14

Preparing for the New Patient Phone Call

page 20

Tracking Electronic Claims with eCentral

page 24

Handling Negative Online Reviews

page 28



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The New Reading Guide

FROM THE EDITOR

When we write *Dentrix Magazine* we try to include articles and information for everyone in the office. You may already be passing your copy of the magazine around the office so team members can read the articles best suited for them.

To make it easier for all readers to see which articles are best for them, we're introducing a new tool called the *reading guide*. You'll find the reading guide on page 2, right after the table of contents.

The reading guide will help you select articles that correspond to your responsibilities in the practice. For example, if you're responsible for appointments, you might be interested in reading *eCentral Communication Manager Enhancements* (page 4), *How to Manage Your Practice in Today's Economy* (page 10), and *Preparing for the New Patient Phone Call* (page 20). Or, if you're responsible for insurance, you should probably read *HIPAA 5010 Software Update* (page 4) and *Tracking Electronic Claims with eCentral* (page 24).

Dentists and office managers can use the reading guide to assign articles to specific team members. Team members can make copies of the relevant articles or download a free PDF of the complete magazine at www.dentrix.com/magazine.

Dentrix Magazine is full of Dentrix tips and practice management recommendations for your entire practice team. Use the new reading guide to make sure your team members are getting the information they need to help your practice become more efficient and profitable.

Regards,

Matt Singerman
Editor-in-Chief

dentrix
MAGAZINE

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DEPARTMENTS

02 READING GUIDE

04 DENTRIX NEWS

06 HOW IT WORKS

The Continuing Care Section of the Practice Advisor Report

Improve continuing care management with the Practice Advisor report. Learn where the numbers come from and what they mean.

20 PATIENT INFORMATION & SCHEDULING

Preparing for the New Patient Phone Call

Follow these tips to create a patient information slip and customize Dentrix to record the information you gather.

22 PATIENT CARE

DEXIS® Imaging Suite: New Clinical Tools that Integrate with Dentrix

DEXIS has a new imaging suite that integrates with the Dentrix Patient Chart. Discover the many new features and how to use them.

24 YOUR MONEY

Tracking Electronic Claims with eCentral

Use Dentrix and eCentral to track your insurance claims and get paid faster.

26 GOING PAPERLESS

Managing Unfiled Documents in the Document Center

Scan multiple documents into the Unfiled Documents folder and then assign them to sources at a later time.

28 BUSINESS OF DENTISTRY

Handling Negative Online Reviews

What do you do when patients post negative comments about your practice?

30 DENTRIX BY THE NUMBERS

10



COVER STORY: HOW TO MANAGE YOUR PRACTICE IN TODAY'S ECONOMY

Learn what top management consultants recommend and how to do it with Dentrix.

14



GROW YOUR PRACTICE WITH PATIENT REFERRALS

Patient referrals are one of the best ways to attract new patients. Learn how Dentrix makes it easy to record, track, and reward referrals from patients.

Reading Guide

If You Manage

INSURANCE

APPOINTMENTS

MANAGEMENT REPORTS, APPOINTMENTS,
MARKETING

PATIENT INFORMATION, MARKETING

APPOINTMENTS, PATIENT INFORMATION,
MARKETING

CLINICAL RECORDS

INSURANCE, BILLING & A/R

PATIENT INFORMATION

MARKETING

Read This Article

HIPAA 5010 Software Update
Announcing New Electronic Claims and Eligibility Payors
PAGE **4**

eCentral Communication Manager Enhancements
PAGE **4**

How to Manage Your Practice in Today's Economy
PAGE **10**

Grow Your Practice with Patient Referrals
PAGE **14**

Preparing for the New Patient Phone Call
PAGE **20**

DEXIS Imaging Suite
PAGE **22**

Tracking Electronic Claims with eCentral
PAGE **24**

Managing Unfiled Documents in the Document Center
PAGE **26**

Handling Negative Online Reviews
PAGE **28**

HOW TO LEARN MORE

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

Dentrrix Magazine Online

You can access free PDF versions of *Dentrrix Magazine* on the Dentrrix website. Here you'll find the current issue of the magazine as well as several past issues. Every member of your team can download his or her own copy of the magazine, and you can access the magazine when you are away from the office. Browse to www.dentrrix.com/magazine today to access *Dentrrix Magazine* online.

Dentrrix Resource Center

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

Dentrrix Help Files

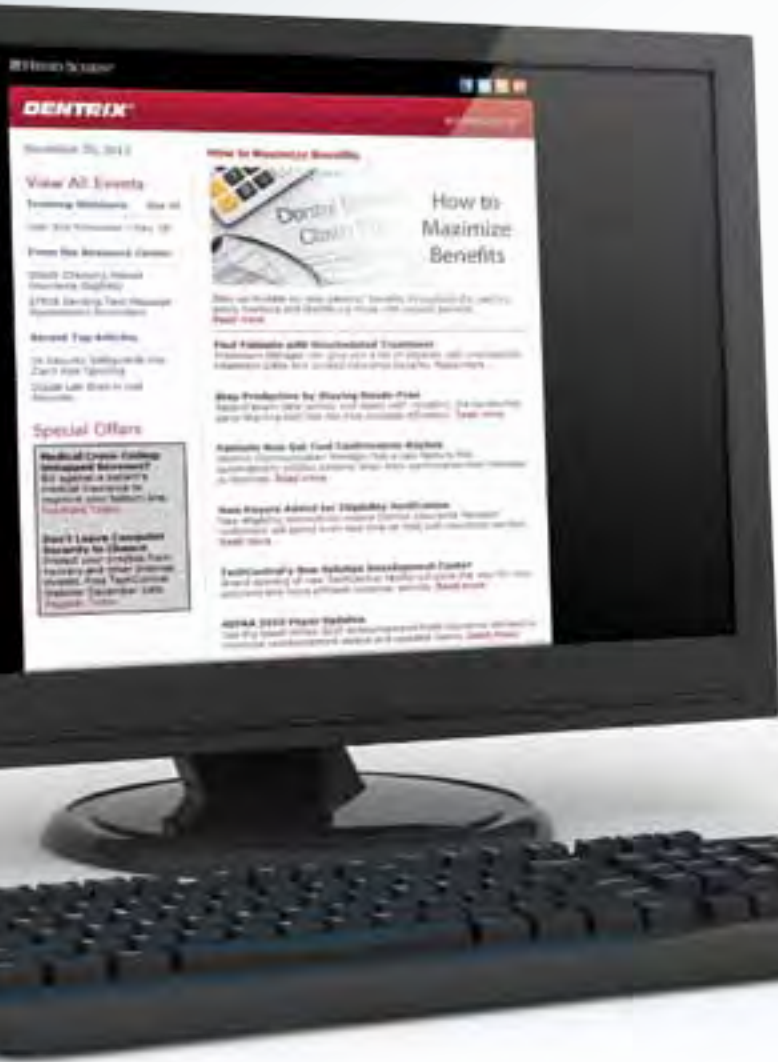
In the Dentrrix Help Files, you can explore a comprehensive list of conveniently indexed topics or search the topics for key words. To search the Help files, from the **Help** menu in any Dentrrix Module, click **Contents**, click the Search tab, type a search phrase or topic name, click **List Topics**,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

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▼ eCentral Communication Manager Enhancements



The eCentral Communication Manager now responds to patients that confirm their appointments via text message. Patients are sent a message that reads “Thank you. Your appointment has been confirmed.” The response eliminates any question patients may have about whether or not their confirmation was received by the dental office.

This feature was highly requested after the recent software release that allowed patients to confirm appointments with a

text message. Practices that have already enabled text message confirmation do not need to make any additional changes. Notifications informing the patient that the appointment confirmation was received will be sent automatically. And, since unlimited text messages are included with Communication Manager, there is no additional fee for this feature.

Communication Manager users who are interested in allowing patients to confirm appointments via text message can learn more by visiting www.dentrix.com/getting-started/text-message. This page includes demo videos, a getting started guide, webinar options, and more.

▼ Announcing New Electronic Claims and Eligibility Payors

We are pleased to announce that Dentrix users can begin sending patient insurance claims electronically to the following payors:

Payor ID	Payor Name
31172	HealthTrans
31172	Innovative Benefit Administrators
22823	Mid-America Benefits
23229	Integral Quality Care
34181	Commerce Benefits Group
37227	CNIC Health Services
37301	Summit America Insurance Services
41154	MMSI- Mayo Clinic Health Solutions
44219	ClaimsBridge NW

Payor ID	Payor Name
55731	ClaimsBridge South
68423	ClaimsBridge Midatlantic
74431	Ohio PPO Connect
81040	Allegiance Benefit Plan Management
89461	ClaimsBridge North
CHSBD	Bay Area Delivery Drivers
CPPCA	Healthy Families
WDENC	Encara

Users can now send electronic attachments to the following payors:

Payor ID	Payor Name
07000	MHP (Metropolitan Health Plan)
07000	First Blue Plan
07000	Civic Smiles
52133	Healthplex - Florida DHMO (Solstice)
52133	Lincoln Financial Group FL - DHMO (Solstice)
CPPCA	Healthy Families
CX049	Coventry Dental
CX049	Prudential Dental - Group Dental Service
SCION	Keystone Mercy Health Plan
SCION	Scion Dental of FL
CBNY1	Empire

Dentrix users can now begin sending patient insurance eligibility verification through the following payors:

Payor ID	Payor Name
PHP01	Abrazo Healthcare (Phoenix)
93524	Advantage Dental Plan
58066	AFLAC GA
52080	AFLAC NY
R7003	Benefit Inc
EXC02	Blue Cross Blue Shield - New York (Central New York)
TLY26	Blue Cross Blue Shield of Arkansas
CB865	Blue Shield of Pennsylvania (Camp Hill) FEDERAL
CBPA2	Blue Shield of Pennsylvania Dental Plus
CBPA2	Blue Shield of Pennsylvania Dental Plus
94146	California Medicaid
CKOH2	CareSource (Medicaid of OH)
TLX70	CIGNA Flex Care (New Mexico Only)
PHP01	Community Connection (Phoenix)
52133	DBP- Americhoice (NJ/PA) UHC (MS)
07035	DeCare Dental Health Ins
84056	Delta Dental of Colorado
51022	Delta Dental of Delaware
82029	Delta Dental of Idaho
CDMN1	Delta Dental of MN
56101	Delta Dental of NC
CDND1	Delta Dental of ND
CDNE1	Delta Dental of NE
05029	Delta Dental of Rhode Island
TFQ14	Dental Claims Payors (NY)
A1004	Detroit Laborers (Metropolitan)
72630	First Ameritas Life Insurance Corporation of New York
R7004	Flex Compensation
CKFL1	Florida Medicaid
44054	Government Employees Hospital Association
TLZ11	Healthplex Inc - Child Health Plus(CHP)/Family Health Plus(PHP)
TLZ16	IBEW Local Union 270
CX058	Kansas City Life Insurance Company
CKMA1	Massachusetts Medicaid
CX026	MEDICA of MN
A1432	Michigan Laborers Health Care Fund
TLX64	NCAS (Harrisburg)

Payor ID	Payor Name
CKNY1	New York Medicaid
93525	Northwest Dental Services
93525	Oregon Health Plan (OHP)
93525	Oregon Medical Assistance Program (OMAP)
TLY91	Painters Trust Association
TLX74	Personal Choice (PA)
PHP01	Phoenix Health Plan (PHP) AZ
68195	Provident Life
RLHA1	Renaissance Life and Health
TLW27	School Claim Services LLC (PA)
93742	Securian
30920	Sheet Metal Workers Local 20
BSC01	South Carolina BCBS
57254	State of Texas Dental Plan
DELTA	Teamsters Welfare Fund (MI)
CPPTX	Texas CHIP Program
91062	Washington Dental Service
R7002	Wilson McShane (MN)
CKWY1	Wyoming Medicaid
TLY10	Zenith Administrators (AZ)
TLY12	Zenith Administrators (CO)
TLY14	Zenith Administrators (IL)
TLY15	Zenith Administrators (IN)
TLY16	Zenith Administrators (KY- Louisville 1)
TLY17	Zenith Administrators (KY- Louisville 2)
TLY18	Zenith Administrators (LA)
TLY11	Zenith Administrators (Los Angeles Claims Only)
TLY19	Zenith Administrators (MA)
TLY20	Zenith Administrators (MI)
R7001	Zenith Administrators (MN)
TLY21	Zenith Administrators (MN)
TLY23	Zenith Administrators (MO - Earth City)
TLY22	Zenith Administrators (MO - Kansas City)
TLY13	Zenith Administrators (MO)
TLY24	Zenith Administrators (NV)
TLY25	Zenith Administrators (OK)
TLX36	Zenith Administrators (San Francisco)
TLZ33	Zenith Administrators (TX)
TLY27	Zenith Administrators (WA- Seattle)
TLY28	Zenith Administrators (WA- Spokane)
TLY29	Zenith Administrators (WI- DeForest)
TLY30	Zenith Administrators (WI- Milwaukee)

Learn more about submitting electronic claims and attachments at www.dentrix.com/getting-started/eclaims. From this page you can view getting started guides, tutorials, and webinars.

Learn more about checking patient insurance eligibility at www.dentrix.com/getting-started/eligibility. From this page you can view getting started guides, tutorials and webinars.

View the Payor Search Tool at www.dentrix.com/products/eservices/eclaims/payor-search.aspx to see the complete list of available payors and request new payors to be added to the list.

HOW IT WORKS:

The Continuing Care Section of the Practice Advisor Report

To ensure your practice is as profitable as possible, it's important to track key performance indicators, or KPIs. The Dentrax Practice Advisor shows your practice's KPIs in several categories, including continuing care. To access the Practice Advisor, in the Office Manager, click **Analysis**, then **Practice Advisor**. Or, click the **Practice Advisor** button.

Practice

1 Report Date: 12/22/2011

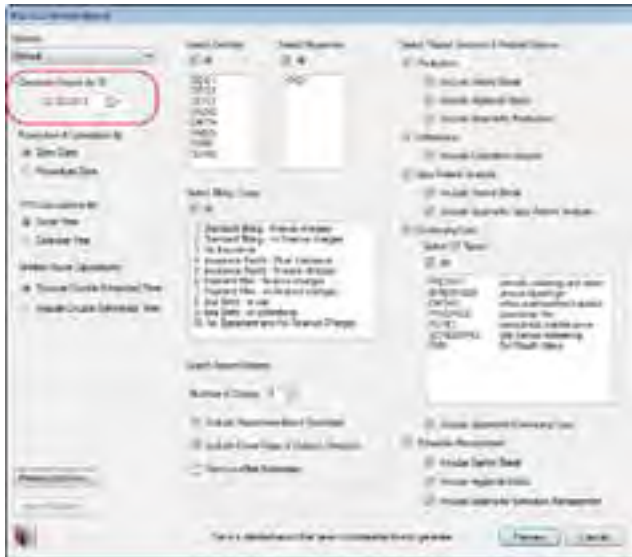
2 Active Patient Base

3 CONT

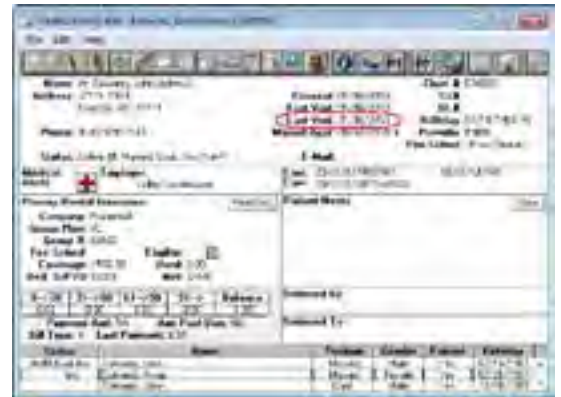
CC Visits		Nov 11
4 Patients with CC Visit within last 12 months		
5 # of CC Patients Seen	151	
6 # of Patients Seen with Appt Scheduled	55	66%

CC Due		7 Prior Overdue
8 # of Patients Due for CC	474	
9 # of Patients Due with Appt Scheduled	15	1%

1 This is the date for which you ran the report. Usually, the report date is today's date. However, you can run the report by a specific date you select in the Practice Advisor Report dialog box.



2 This is number of patients in your database who are considered active. Patients are considered active if their last visit date in the Family File is within the range you specified in the Practice Advisor Setup dialog box.



5 This row shows the number of patients who came in for a continuing care appointment within the date range of each column. This row does not have statistics in the Benchmark or Variance columns.

6 This row shows the number of patients who 1) came in for a continuing care appointment and 2) have an appointment scheduled for their next continuing care due date.

The percentages in this row show the percentage of continuing care patients seen who have an appointment scheduled for the next time they are due for continuing care.

7 This column shows the number of patients whose continuing care became due at least two months before the report date.

Advisor Report

se by Last Visit: 1,516

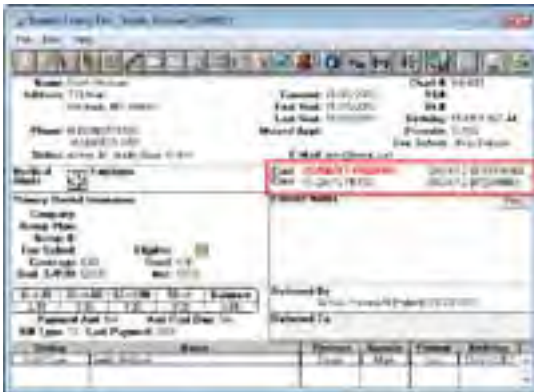
CONTINUING CARE

MTD Dec 11	Benchmark	Variance	YTD Dec 11
1,030 68%	80%	-12%	30
165			410
59 71%			126 57%

Nov 11	Dec 11	Jan 12
74	87	35
75 7%	20 3%	4 11%

For a full explanation of each row and column in the Continuing Care section of the Practice Advisor Report, see the Continuing Care topic in the Dentrix Help. You can also visit the Dentrix Resource Center and view the Practice Advisor tutorial. See "How to Learn More" on page 2 for instructions on accessing these resources.

3 In order for patients to be counted in the Continuing Care section of the Practice Advisor, they must be attached to continuing care in the Family File.



The Practice Advisor looks at the Prior Treat. (prior treatment), Appt? (whether an appointment is scheduled), and Date (due date) columns in the Dentrix Continuing Care dialog box to calculate the statistics in this section of the report.



8 This row shows the number of patients who have a continuing care procedure that is due within the date range of each column. Patients who have more than one continuing care procedure due are only counted once. There are no benchmarks for this row.

4 This row shows the number of patients who have a pending continuing care visit. Patients are listed in this row if they came in for treatment on or after the beginning of the time span you set up in the Practice Advisor Setup dialog box.



The percentage in this row is the percentage of active patients (#2) who came in for a continuing care visit on or after the beginning of the time span you set up in the Practice Advisor Setup dialog box. This row does not have statistics in the Previous Month or Year-To-Date columns.

9 This row shows the number of patients who 1) have a continuing care procedure that is due within the date range of each column and 2) have an appointment scheduled for the continuing care procedure that is due. Patients who have more than one continuing care procedure that is due within the date range of each column are only counted once.

The percentages in this row are the percentage of patients who have an appointment scheduled for their pending continuing care. There are no benchmarks for this row.



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- Get timely insurance payments
- Give more accurate patient estimates
- Keep your schedules filled



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HOW TO MANAGE YOUR PRACTICE IN TODAY'S ECONOMY

Management experts remind us that even in this economy, growth is happening.

Things are looking up," read the opening line in a May 2011 ADA News article reporting a surge in economic confidence among ADA members.¹ But by August, that confidence had changed and the ADA reported that dentists were "feeling the pinch."² While confidence in the future of their practice is still higher than where it was in the third quarter of 2011, many dentists continue to fight a feeling of uncertainty about the future of their business. In this roller coaster economy, it's hard to know whether to hold on, get off, or enjoy the ride.

"People stress out when recessions hit, and that affects marriages, employee turnover and a variety of other things that are difficult for any dentist to predict, control and survive," says John Jameson, chairman of the board at Jameson Management. He continues, "We have to regroup and use the energy stimulated by our pain or fear or desperation. We have to use that energy to turn things around and invest in what will elevate us out of this decline, one step at a time. From the right equipment to the right training to the right team and the right clinical skills, we have to address one item at a time and keep improving. There is hope and there is help all throughout our industry."

How can you bring that hope and help to your business? Dentrix Magazine spoke to leading experts in dental practice management to find out their suggestions for managing a successful practice in the face of the highs and lows of a changing economy.

Attitude is Everything

The experts all agreed that when times get tough, dental offices must take control of their attitudes and practice management systems. Lois Banta, CEO, President and Founder of Banta Consulting, Inc., emphasized the relationship between attitude and success, commenting, "Everyone has concerns about the economy. However, their attitude about how they deal with their concerns will help to determine their success or failure."

Amy Morgan, CEO of the Pride Institute, reminds us that we control how we react when times get tough. "There are offices that are having poor years right next door to offices that are exceeding goals. Although regionally there are very real economic situations, the danger is for the doctor and team to not approach their practice successes or failures from the viewpoint that they are in control—because the sole source of their problems is not the stock market or national debt ceiling."

Growth is Possible

While some offices may consider the economic climate and feel grateful to be able to pay their bills and stay in business, our management experts

remind us that even in this economy, growth is happening. The Jameson Management group reported that according to their internal data for 2010, dental offices they worked with saw average production increases of 34%, collections increases of 33%, and hygiene increases of 55%. Dr. Jameson explains the growth in this way, "Their wisdom to get a coach and then their commitment to address each of the 25 systems within their practice³ one by one, strategically—that's what made the difference for them."

At the Pride Institute, Amy Morgan has seen similar growth. "In all regions from rural to urban, there are practices that are staying even with their prior success or exceeding goals for productivity." Morgan identified the secret of these offices's success as action. "They are neither complacent nor are they creating fear-based urgency—they are taking action! They are working on their practice, not *in* their practice by training their team, adding new clinical and technology initiatives, enhancing their systems, and marketing in new ways, which helps them exceed expectations."

Increased levels of customer service create growth, according to Lois Banta. "Decay and dental issues don't take a vacation while we wait for the economy to improve. And patients typically judge good dentistry based on how the dentist and the team treat the patient."

Advice into Practice

What positive steps can you take to keep your practice rolling along during the ups and downs of a roller coaster economy? We asked our experts what advice they would give to offices wanting to grow their business. They responded with practical steps that you can implement using your Dentrix software.



Do Something!

"The best advice I can give is to do something! Start with how you are communicating to your existing patients. Have you told them that you will help them preserve their health and well-being in any economy?

Have you offered more flexible financial options? Once these things are done, then invest in some new marketing to get new results." **Amy Morgan, CEO, Pride Institute**

Dentrix Does It

Dentrix makes it easy to communicate with your existing patients. The Letter Merge feature allows you to draft letters or postcards in Microsoft Word and then merge in patient data from your Dentrix database. By using Letter Merge, you can easily get the message out to your patients that you care about their oral health and that you want to help them keep their smile bright.

Dentrix already has letters created that you can use to reach out and motivate your patients to come back in and see you. The Treatment Plan Reminder letter finds all patients with treatment-planned work who don't have appointments scheduled and invites them to come in for a visit.

To generate a Treatment Plan Reminder letter, click **Letters > Misc** in the Dentrix Office Manager. Then highlight the Treatment Plan Reminder letter and click **Edit**. Make sure that your patient filters are set correctly. For example, you may want to contact all patients except for patients with a billing type that indicates an account that was sent to collections.

Since you're trying to market to patients with existing but unscheduled treatment plans, you'll want to set your

filters so that only patients with no future appointments scheduled will receive the letter. To set your filters, click the **Appointments** search button and then click the **Existing Patients with NO Appointment** in date range option. Next, click the **Appointment Date Range** option and enter a date range beginning today and ending in six months. Click **OK** to return to the Patient Report View window.

Finally, you'll need to target patients with treatment-planned work. Click the **Procedures** search button and then under **Search For**, click **Treat Plan**. Click **OK** to return to the Patient Report View window and then click **OK** to exit the Patient Report View window. You're now ready to merge and print your letters.

Learn More

To learn more about Letter Merge, visit the Dentrix Resource Center and view the Dentrix Letters webinar recording. You can also see the Merging Dentrix Letters topic in the Dentrix Help.

AMY MORGAN is a renowned dental consultant and CEO of Pride Institute. Amy is a highly sought-after educator and speaker who has been a featured speaker at every major dental meeting and has been published in nearly every major dental publication. For information on Pride Institute, visit www.prideinstitute.com or call Pride Institute at 800-925-2600.



Figure 1 With Dentrix Letters you can create professional marketing materials to communicate to your patients that even in a tough economy you are concerned about their oral health and that you will work with them to meet their dental needs.



Look at Critical Factors

“Look at the critical factors of your practice. Where are you hurting the most? Accounts receivable? New patients? Retention? Hygiene retention? What are your goals for the long term future—what is your ideal

practice like? Take that vision and then address the systems where you’re hurting the worst. Get help as you need to and don’t give up.”

John Jameson, D.D.S., *Chairman of the Board, Jameson Management*

Dentrix Does It

You can implement Dr. Jameson’s advice today with a few quick mouse clicks to generate the Practice Advisor report. New as of Dentrix G4 Productivity Pack 7, the Practice Advisor looks at the critical factors that affect your practice profitability, compares them to industry-standard benchmarks, and offers specific recommendations to help you improve your practice’s performance.

The Practice Advisor Report shows you your totals for the previous month, the current month to date, and the year to date. The Variance columns show you any differences between the benchmarks and your actual totals. The alert icons in the Variance columns correspond to suggestions found on the footnotes pages of the report.

Before running the Practice Advisor report, it’s important to set up the Practice Advisor correctly so that the statistics accurately reflect the way you run your practice. To set up the Practice Advisor, open the Office Manager. Click the **Practice Advisor** button to open the **Practice Advisor** dialog box. Click the **Practice Advisor Setup** button. Review the default settings and make changes as needed.

After you’ve completed the Practice Advisor setup, you’re ready to run the report. From the **Practice Advisor** dialog box, click the **Practice Advisor Report** button. Set the options for the data you want to populate the report. Click the **Preview** button to view the report.

Learn More

To learn more about the Practice Advisor, visit the Dentrix Resource Center and view the Practice Advisor tutorial or webinar recording, or download a copy of the Dentrix G4 Reports Reference.

DR. JOHN H. JAMESON is Chairman of the Board for Jameson Management, Inc., an international dental consulting firm. After practicing dentistry for years, Dr. John, his wife Cathy and a team of 30+ professionals improve the lives of dental professionals worldwide through dental practice management, marketing and hygiene coaching. Visit www.JamesonManagement.com for more or call 877-369-5558.



Figure 2 The Practice Advisor Report allows you to look at the critical factors of your practice, identify where you’re hurting, and then take guided steps to begin addressing those issues.



Inspect what you Expect

“Develop a strategy that includes fine-tuning leadership, improving communication, and tracking statistics to identify trends. Inspect what you expect consistently, hold weekly productive team meetings, and hold a morning

huddle before you start your day to identify potential issues.” **Lois Banta**, CEO of *Banta Consulting, Inc.*

Dentrix Does It

Dentrix makes it easy for you to “inspect what you expect” and communicate to your staff about those findings by using the Daily Huddle report. Available in Dentrix G4 Productivity Pack 8, the Daily Huddle lets you monitor daily progress towards goals, helps team members use their time more effectively, gives you easy access to information about patients scheduled for the day, and as a result, helps you improve patient care and your overall business operations.

To run the Daily Huddle Report, open the Office Manager and select **Analysis > Practice Advisor**. Click **Practice Advisor Setup** to specify which providers you want counted as dentists

and hygienists. Close the **Practice Advisor Setup** dialog box and click **Daily Huddle Report** to set up the report options and run the report. In the **Daily Huddle Report** dialog box, set up the options to filter this report. You can include production, collections, case acceptance, new patients, and scheduling statistics. You can also choose to include a summary of scheduled patients in a grid format, a list of scheduled patients, a phone list for scheduled patients, and route slips. After you have set up the report options, click **Preview** to generate the report.

Learn More

To learn more about the Daily Huddle Report, visit the Dentrix Resource Center and view the Daily Huddle Report webinar recording. You can also see the Daily Huddle Report topic in the Dentrix Help.

LOIS BANTA is CEO, President and Founder of *Banta Consulting, Inc.*, a company that specializes in all aspects of dental practice management, the new owner and CEO of *The Speaking Consulting Network*, and a member of *The Academy of Dental Management Consultants (ADMC)*. To contact Lois, call her office at 816-847-2055, email: lois@bantaconsulting.com or check out her website: www.bantaconsulting.com.



Figure 3 Use the Daily Huddle Reports to “inspect what you expect” on a daily basis. You can use the reports to track statistics, identify potential issues, and assist you and your staff in strategizing for your day.

Notes

- 1 Soderlund, Kelly. “Economic Confidence.” ADA News. May 02, 2011. <http://www.ada.org/news/5761.aspx> (accessed September 08, 2011).
- 2 Second quarter economic confidence survey results show downturn.” ADA News. August 15, 2011. <http://www.ada.org/news/6132.aspx> (accessed September 08, 2011).
- 3 For more information about Jameson Management’s 25 Systems, see “Evaluating your Management Systems” in the Summer 2011 issue of Dentrix Magazine available online at <http://www.dentrix.com/magazine>.



ROGER GAGON

Senior Editor

GROW YOUR PRACTICE with Patient Referrals

Patient referrals are one of the best ways to attract new patients.
Learn how Dentrix makes it easy to record, track, and reward referrals from patients.

When you need a good auto mechanic, do you choose one based on an advertisement, or do you prefer to ask family and friends who they go to? If you're like me, you do the latter. When most people need professional services of any type, they will do a little research and then ask others who they recommend. They'll ask about the quality of service they've received in the past and how they were treated as a customer. This type of personal information is valuable when choosing any professional—including a dentist. That's why experts agree that developing an effective referral strategy is one of the best ways to attract new patients to your practice.

Existing patients are the best source of referrals. Amy Morgan, CEO of Pride Institute, recommends that 60–80 percent of all new patient referrals come from satisfied patients of record. The key is getting satisfied patients to give referrals. Most patients won't even think about it unless you ask, so you have to be proactive in asking patients for referrals.

Many offices request referrals during patient checkout or include referral requests in a post-visit satisfaction survey. You might begin by saying something like: "If you're happy with the dental care we've provided you, please feel free to recommend us to your friends and family." You can then request a name, phone number, and any additional helpful information. You can also mention your office's referral rewards program, if you have one, to encourage people to make referrals.

Because it's so important for you to get referrals from patients and track them, Dentrix has several tools, reports, and resources to help you. You can add and manage referral information, give appreciation and rewards to patients who provide patient referrals, and analyze referral statistics in Dentrix.

Adding and Managing Patient Referrals in Dentrix

Recording referrals in Dentrix helps you track patients who repeatedly give referrals so you can send thank-you messages. It also helps you monitor the effectiveness of your advertising and how many people are providing referrals with their surveys.

In the Family File, you can enter information about who referred each patient. To add referral information, open the Family File record for the patient who was referred to your practice and double-click the **Referred By** block. The **Dentrix Patient Referrals** dialog box appears (Figure 1).

In the **Referred By** section, click **Add Referral**. In the **Select Referral Type** dialog box, select **Patient** and click **OK**. In the **Select Patient** dialog box, select the person who referred the current patient and click **OK**. The referring patient now appears in the **Dentrix Patient Referrals** dialog box.

Once a referral has been added to the **Dentrix Patient Referrals** dialog box, the **Analysis** button becomes available. Click **Analysis** to display the **Referral Analysis** dialog box (Figure 2). After a patient has provided multiple referrals, you can specify a **Referral Date Span** and **Production Date Span** to look at referrals from that patient that fall within the dates you specify. You can view the number of referrals from that patient and the production that has resulted from those referrals. You can also send a thank-you email message, add notes, record an entry in the Office Journal, and record and track gratuities.

Rewarding Patients for Referrals

Giving gratuities is a great way to say thank you to patients who provide referrals—and it can also encourage additional referrals. Helen H. Cohen, a dental office manager and dental coach in Kansas City, Missouri, says, "Referrals from patients need to be rewarded. Use your dental software to monitor all patient referrals weekly, monthly, and annually by source... Establish a referral reward system for each time your patients send you their first, second, and third referrals. A simple handwritten thank you note is a very genuine, remembered, and cost effective first step. From there, you may elect to give gift cards for restaurant meals, movies, coffee houses and more."

To send a simple thank you for a patient referral, or to include a thank-you letter along with some form of gratuity (such as movie tickets or a restaurant gift card), you can use the **Print Label** and **Quick Letters** buttons at the bottom of the **Dentrix Patient Referrals** dialog box. Using the **Print Label** button, you can print a mailing address label on your label printer. Using the **Quick Letters** button, you can select the **Referred By Patient** letter from the list and click **Build/View** to merge a letter in Microsoft Word with the patient's personalized information from Dentrix. You can then customize the letter, if needed, and print it.

If you want to send an email thank you, clicking **Send Email** opens your default email program and adds the referring patient's email address.

Analyzing Referral Statistics

Dentrix includes several reports that provide useful statistics and other information to help you analyze patient referrals. For example, the Practice Advisor Report – New Patient Analysis shows practice details for new patients for specific time periods, including the number and percentage of new patients that resulted from referrals. This report also compares your referral statistics against industry-standard benchmarks from top dental

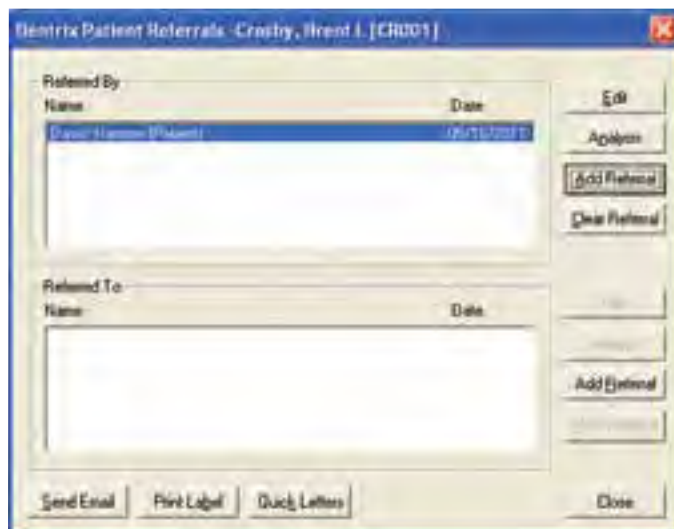


Figure 1 You can add and edit referral information in the Dentrix Patient Referrals dialog box.



Figure 2 You can analyze referrals and record gratuity in the Referral Analysis dialog box.



Figure 3 Use the Referral Manager to create custom referral templates.

Experts agree that developing an effective referral strategy is one of the best ways to attract new patients to your practice.

consultants. You should run the Practice Advisor Report – New Patient Analysis on a monthly basis to see how your patient referrals compare to these industry-standard benchmarks.

To run the Practice Advisor Report – New Patient Analysis, in the Office Manager, from the **Analysis** menu, click **Practice Advisor**, and then click **Practice Advisor Report**. In the **Practice Advisor Report** dialog box, specify the options and information you want to be included in the report. For information on using these options, click the Help icon in the bottom left corner of the dialog box. After selecting the desired options, click **Preview** to display the report in the Print Preview window. To print the report, click the Print icon on the toolbar.

Other reports that contain helpful referral information include the Daily Huddle Report for New Patients, the Referred by Patient Report, and the New Patient Summary Report.

Receiving and Managing Referrals in eCentral

If you use eCentral, you can include a request for patient referrals automatically with the post-visit online survey. When you receive referrals from existing patients, you can view them in the eCentral Communication Manager.

To set up patient surveys in eCentral, from the **Communications** tab menu, click **patient survey**, and then click **Setup**. The Patient Surveys Setup page allows you to select

the content of the patient surveys you want to deliver to your patients. It also allows you to set up email delivery options for your patient surveys.

Make sure the first option, **Email Appointment Surveys to all patients with an email address following their scheduled appointment**, is selected, and then select the survey questions and delivery options you want. When finished, click **Save**.

Next, you need to select and personalize a referral template to use with your patient surveys. From the **Communications** tab menu in eCentral, click **referrals**, and then click **Edit** under the Referral Email heading. Select the referral template you want to use (Figure 3). If you want to customize the template, click **Edit Template** and make any needed changes. Don't replace the information in double brackets, such as `[[Patients First Name]]` and `[[Practice Name]]`—this will be filled in automatically using the data in your Dentrix database. When you're finished, save the template changes using the **Save** icon. When the referral template is ready, click **Make Active**. Each time patients complete a satisfaction survey with a positive response, eCentral will prompt them to refer a friend.

As eCentral receives your referrals, you can view them on the **Patient Referrals Received** page. From the **Communications** tab menu, click **referrals**, and then click **Search Referrals Received**. Specify the search criteria and date range, and then click **Submit** to display the referrals that meet the specified

Patient Referrals Received

View all of the referrals that you have received from patients.



As of today, your practice has received 5 patient referrals.

Referrals received between 07/25/2011 - 07/29/2011

Click the Contact Name to view their information

Referred By	Contact Name	Phone Number	Referred Date
<input type="checkbox"/> Bond, Frank	Jones, Bart	801-555-1212	07/25/2011
<input type="checkbox"/> Jones, Jim	Smith, Bob	801-555-1212	07/27/2011
<input type="checkbox"/> Simpson, James	Simpson, Derek	801-555-1212	07/27/2011
<input type="checkbox"/> Jones, Bob	Bott, Sam	801-555-1212	07/27/2011

Figure 4 Using eCentral, you can view the online referrals you have received from patients.

criteria (Figure 4). To read the referral information (phone, email address, and notes), click the name in the **Contact Name** column.

If you want to increase your patient base and grow your practice, ask for referrals and reward patients who

provide them. Dentrax provides several tools to help, but the important thing to remember is that you need to ask. **DM**

Learn More

To learn more about patient referrals, see the following topics in the Dentrax

Help: Adding a Patient Referral and Referral Maintenance Overview. You can also visit the Dentrax Resource Center and view the Patient and Referral Management tutorial and the Referral Management webinar recording. See "How to Learn More" on page 2 for instructions on accessing these resources.



Say Goodbye to the Clipboard!

And Hello to Your Paperless Future.

With **Dentrax Patient Kiosk** and an Apple iPad, patient forms are completed and imported into Dentrax in seconds—saving your office staff time and allowing treatment to begin sooner. Your old clipboards? They're history.

Imagine your practice paperless with Dentrax Patient Kiosk:

- Spend less time manually entering data
- Maintain more accurate patient files
- Reduce compounding appointment delays
- Improve your practice image using the latest technology

To learn more call **1.800.DENTRIX** or visit www.Dentrax.com/Kiosk/iPad



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[My Business Challenge]

I need a steady stream of new patients.

We can help you attract new patients to keep your practice healthy

NEW PATIENTS

We do that!

- Determine new patient goal
- Manage online reputation and reviews
- Implement a patient referral program

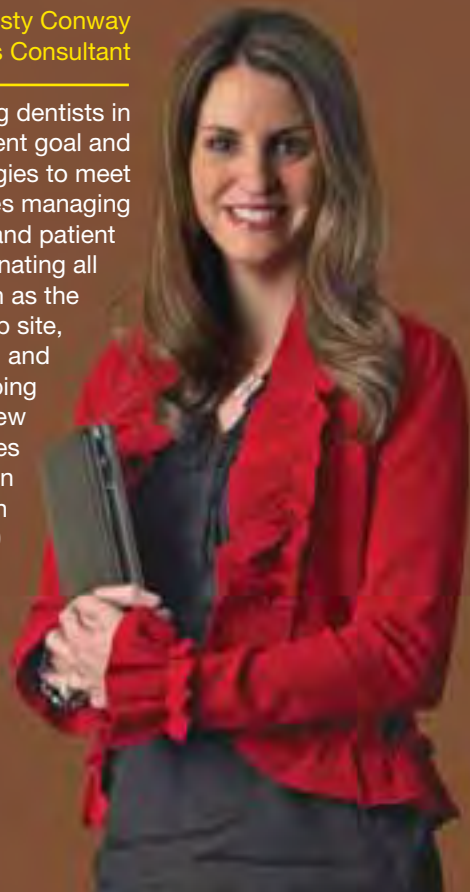
To discuss NEW PATIENTS or other business-enhancing solutions:



Contact your local Henry Schein Sales Consultant or call 1-800-372-4346 (PROMPT 6) Visit www.HenryScheinWeDoThat.com

Christy Conway
Henry Schein Sales Consultant

"I start by assisting dentists in setting their new patient goal and then reviewing strategies to meet that goal. This includes managing their online reputation and patient reviews, and coordinating all online activities such as the practice's Web site, Facebook page, and YouTube videos. Helping my dentists make a few relatively small changes has resulted in generating an additional 10 – 20 new patients a month!"



CODING | HR | MARKETING | NEW PATIENTS | OSHA | OVERHEAD REDUCTION | PERIODONTAL MANAGEMENT
PRACTICE ANALYSIS | RECARE | SOCIAL MEDIA | TEAM HARMONY | TRANSITION PLANNING | WELLNESS

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Patient Information & Scheduling



Preparing for the New Patient Phone Call

Follow these tips to create a patient information slip and customize Dentrix to record the information you gather.

■ **Dayna Johnson** | Certified Dentrix Trainer

You know the old saying: “You never have a second chance to make a first impression”? Well that old saying still means a lot today. How your front office team handles the very first phone call from a new patient not only establishes the patient’s perception of how his or her visit will go, it also impacts the likelihood that they will refer their friends and family.

Scripting your Success

Here’s a common scenario that plays out in every dental office:

“Thank you for calling Smiles by Johnson, this is Dayna, how may I help you?”

“Hi, my name is Susie. I want to schedule an exam and cleaning appointment.”

“Great! How long has it been since you have been in, Susie?”

“This is my first visit—I’m a new patient.”

TELEPHONE INFORMATION SHEET

NAME: _____ ADDRESS: _____ PHONE NUMBER: _____ DATE OF BIRTH: _____

Why here? In order to make a proper appointment for you, may I ask you a few questions?

What were you and your doctor's efforts? _____ New Home Patient Emergency

Name: _____ Relationship: _____

Address: _____ Age: _____ Child's Name: _____

Name of legal guardian: _____ Who will accompany the child? _____

How are we help you? To inquiry _____ Second opinion _____

Tobacco/Wheel _____ Are you pregnant? _____ Is your condition (Yes/No) _____ Does it hurt (Yes/No) _____

Dental work Lost filling Broken crown Swelling Sensitivity to cold/heat _____

Pain Mobility Root problem Other _____

Figure 1 For new patient calls, use a telephone information slip similar to this one from Pride Institute.



When new patients call your office, you'll be ready with a telephone information slip and a place in Dentrix to store the information you gather.

Now what do you do? Does your office have a scripted phone slip you use? If you have a well-rehearsed format for handling the new patient phone call, the patient will feel heard and taken care of. I suggest using a form that helps the team member navigate through all the questions that are necessary to ensure the patient has an amazing first appointment and the office collects enough information so the clinical team can treat the patient effectively. Check out the sample telephone information slip in Figure 1 that was created by Pride Institute. Or you may want to create and use a custom form that meets the particular needs of your office. It should be kept simple but capture all the important information you need to gather during the initial new patient phone call.

Integrating The Telephone Slip With Dentrix

Now that you have collected this information, where do you put it? If your

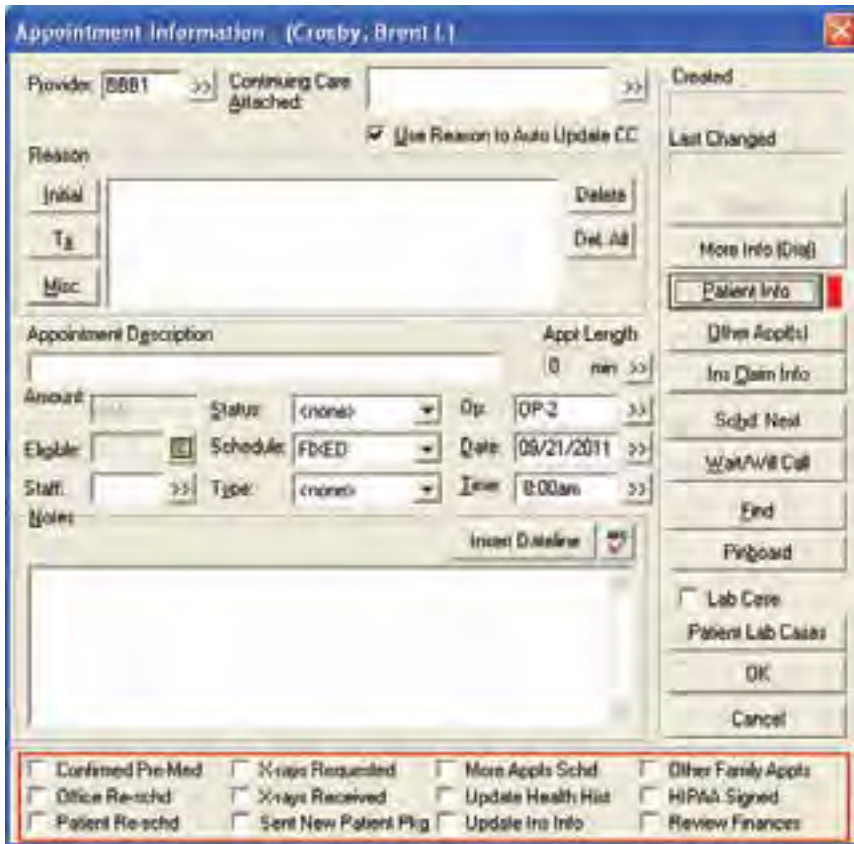


Figure 2 You can customize these checkboxes to record the initial patient information from your telephone information slip.

office is still using paper charts, you might put it in an accordion file until the patient comes in for the appointment and then file it with the paper chart. But what if your office is paperless? I know I don't want to keep unnecessary

paper. Much of the information you gather can be entered in the **Enter New Patient Information** dialog box and in the **Reason** and **Notes** fields in the **Appointment Information** dialog box. But I have an additional suggestion for

you—use the check boxes at the bottom of the **Appointment Information** dialog box (Figure 2). Did you know that they are customizable? You can take some of the checkbox information that you gather from the initial telephone call and use this area to record this information for yourself and other team members.

Up to 12 checklist items can be listed at the bottom of this dialog box. Keep in mind, however, that if you change these definitions, they will change for all patients, including existing patients. If your practice has already been using these checkboxes to record other information, you may not want to change the definitions now. If you haven't been using them, now may be a good time to customize them the way you want and begin using them to record some of the standard appointment information you gather on your patient information slip.

To customize these 12 items, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Definitions** to display the **Practice Definitions** dialog box. From the **Definition Type** list, select **Appointment Check List**. The current list of checklist items is displayed (Figure 3). Select the items you want to change, type a new **Definition Text** (up to 20 characters), and click **Change**. After you've finished customizing the definition text, click **Close**.

Now when new patients call your office, you'll be ready with a telephone information slip and a place in Dentrix to store the information you gather. **DM**

Learn More

To learn more about customizing the scheduling options in the Appointment Information dialog box, see the Customizing Practice Definitions topic in the Dentrix Help. See "How to Learn More" on page 2 for instructions on accessing these resources. To order the Telephone Information Slip featured in this article, visit <http://store.prideinstitute.com/f011-telephoneinformationslip.aspx>.

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 r_d_m@comcast.net or visit her website at www.raedentalmanagement.com.

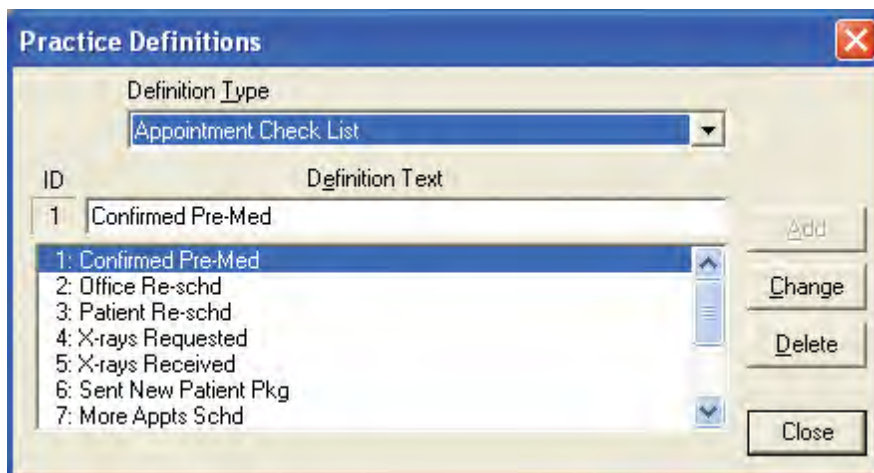


Figure 3 The Practice Definitions dialog box lets you customize the text for your appointment checklist.

DEXIS® Imaging Suite: New Clinical Tools that Integrate with Dentrrix

DEXIS has a new imaging suite that integrates with the Dentrrix Patient Chart. Discover the many new features and how to use them.

■ Jackie Raulerson | Manager, Public and Media Relations, DEXIS, LLC

Here's some great news for Dentrrix Image users: a new DEXIS Imaging Suite is now available to customers who are currently enrolled in a Dentrrix Image Service Level Agreement. The new suite combines the great features of both Dentrrix Image and DEXIS® into one easy-to-use package. The new feature-rich software suite retains the full integration with Dentrrix, efficient image management, fast imaging workflow, and robust patient communication—features that so many DEXIS owners appreciate on a daily basis. This new version will allow Dentrrix Image clinicians to further expand their capabilities by adding other modules such as DEXwrite™, a fully customizable report-writing tool that automatically incorporates images, and DEXimplant™ for implant planning. There are also innovative network and access tools for faster and more flexible office implementation, security, and patient privacy. This article explains how digital imaging can improve your patient care and introduces a few of the new features in the new DEXIS Imaging Suite.

How Digital Imaging Improves Patient Care

One of the greatest benefits of digital radiography is that it can expose dental patients to much less radiation than traditional film X-rays. For patients who are concerned about radiation exposure, this may help them consent to needed X-rays that could lead to better treatment. Another benefit with digital radiography is that the X-ray image is available on the computer screen almost instantly. With film X-rays, you and your patient must wait for the film to develop before you can view the images. Digital images also provide much larger—and clearer—detail than the standard-sized film X-rays, which are typically viewed on a light box. And when it comes time to present a treatment plan, it can be much easier to show treatment areas when you have the necessary

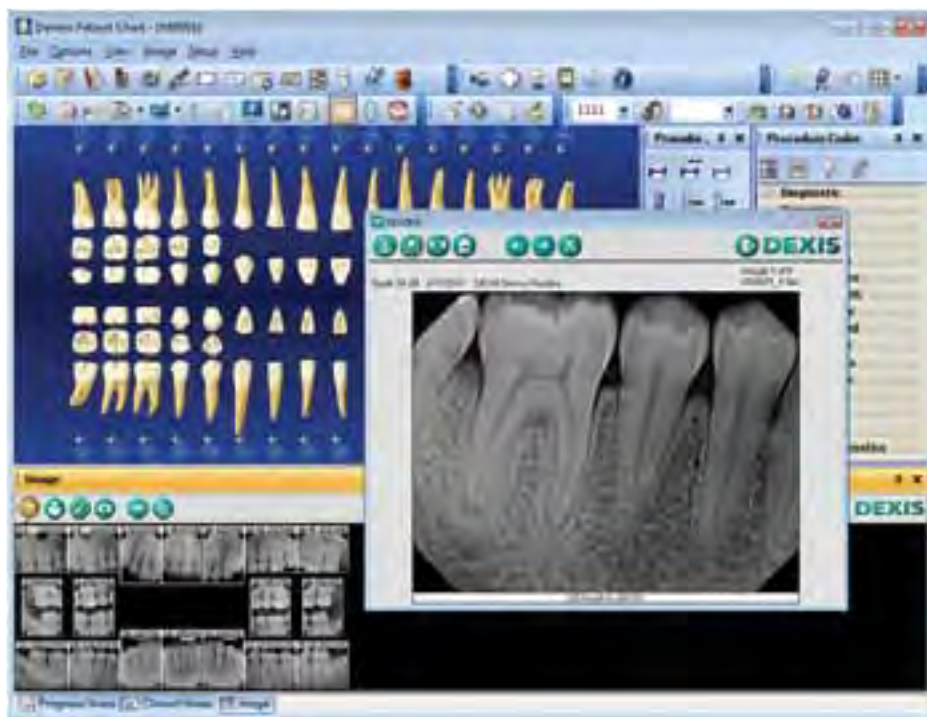


Figure 1 DEXIS' DEXview integrates with Dentrrix Patient Chart to display diagnostic-size images.

tools to enlarge and enhance the digital image on your computer screen.

These are some of the primary benefits to your patients, but digital imaging also benefits you and your office staff. For example, digital X-rays require less storage space, can be easily backed up to a remote site, and can be sent to other providers as e-mail attachments. They are also more environmentally friendly because no film processing chemicals are used in the creation of digital radiographic images.

What You'll Find in the DEXIS Imaging Suite

When you move to DEXIS Imaging Suite, you will automatically receive DEXIS Integrator for Dentrrix that allows for full integration of the two programs.

DEXIS has the unique, time-saving advantage of allowing you to view a large image without leaving the Patient Chart. With DEXIS Imaging Suite installed, a new **Image** tab is added to the bottom of your Dentrrix Patient Chart, which you can click to display all images for that patient. Clicking on an image thumbnail within the Image Panel opens that image in DEXview (Figure 1). You can enhance the selected image in several ways without opening the full DEXIS program.

To help you manage your images, DEXIS Imaging Suite provides an imaging "hub" for all clinical images—including X-rays, digital pans and cephs, digital still photographs, and images from intraoral cameras—in one easy-to-use open workflow format. For example, by clicking the Overview icon



Figure 2 Overview mode displays all the patient's images on one screen or individual image screens with like images.

you can view all the patient's images on one page or view separate image screens that include images of the same type (Figure 2). The DEXIS Imaging Suite features image display options for diagnosis, treatment, and patient education. Double-clicking an image in Overview mode opens the image in a new window where you can enlarge and enhance images and change brightness and contrast using your mouse (Figure 3). This window also offers a full complement of image enhancement

tools, including ClearVu™, Color, Invert, and Relief.

New and existing Dentrax Image customers will appreciate the "live video" function. You can review video clips taken with an intraoral camera and extract images from these clips as needed. You can combine these video images and digital camera stills with the patient's radiographs to form a presentation that tells their treatment planning story.

To share the dentists' aesthetic vision, a new module, DEXcosmetic,



Figure 4 DEXIS lets you enhance images for diagnostics and patient education.



Figure 3 DEXIS lets you enhance images for diagnostics and patient education.

shows patients the projected results of cosmetic procedures so they can see the possibilities for improvement in their smiles (Figure 4). For instance, the Whiten tool changes the color and opacity of teeth to simulate whitening and/or veneers. The program allows for the virtual replacement of missing teeth and even the closing of diastemas. Click on the DEXcosmetic icon, choose Copy/Reshape, then one of the Drawing tools to trace an existing tooth to use as a replacement. Once copied, these items can be flipped, rotated, sized, and moved as needed. They can also be moved in 3D, so patients can see a more realistic view of improvement (Figure 4). Since this is digital information, you can e-mail these images to patients as they make decisions on your proposed treatment.

DEXIS Imaging Suite also integrates with other software programs, such as the i-CAT-powered® 3D cone beam system. This integration allows you to use and preview i-CAT patient data within the DEXIS software. DEXIS images can be integrated into Henry Schein Guru® and used for patient education.

DEXIS Imaging Suite offers Dentrax Image offices the "suite" success of better image management, improved patient care and communication, and greater opportunities to grow the practice.

Note: Although Dentrax provides integration with third-party imaging solutions for documentation and patient education purposes, Dentrax is not a tool for diagnosis or treatment. DM

Learn More

To learn more about the DEXIS Imaging Suite, visit the DEXIS website at www.dexis.com.



Tracking Electronic Claims with eCentral

Use Dentrix and eCentral to track your insurance claims and get paid faster.

■ **Gentry Winn** | Contributing Editor

Receiving insurance payments in a timely manner is an essential part of your practice's financial health. But, when the mere mention of the word "insurance" invokes feelings of frustration, claim tracking can be pushed aside. However, by doing little things each day and each week, you can make tracking claims a simple task instead of a dreaded chore. With a little know-how and the right tools, you can work smarter and receive payments faster.

Electronic Claims

A discussion about claim tracking would not be complete without mentioning electronic claims. Filing claims electronically is cost effective and convenient. What's more, you'll get paid a lot faster than with mailed claims.

To take full advantage of the claim tracking features discussed in this article, you'll want to use eTrans, the only e-claim submission tool that fully integrates with Dentrix. For example, if eTrans finds certain missing information when you are submitting a claim, it warns you and allows you to correct the mistake from eTrans, which in turn updates Dentrix, before you continue with the submission. Preventing a submission error is an excellent way to ensure that you get paid in a timely manner.

Daily Web Syncs

The WebSync, which can be set to run automatically every day, syncs Dentrix with eCentral to help you track claims in small chunks on a daily basis. After a Web sync runs, the **Claim Tracking** page of eCentral opens so that you can view the statuses of all claims synced during the upload to eCentral (Figure 1). With the claim tracking feature of the WebSync, you can identify the "not received," "additional information required," and "rejected" claims more quickly so that you can fix and resubmit those claims to get paid in a timely manner.

Claim ID	Submitted	Status	Insurance Carrier	Claim #
402195005	09/01/2011	Accepted	American Western Life	1100000000
402197366	09/01/2011	Rejected	American Western Life	1100000000
402202897	09/01/2011	Accepted	Ameritas	1100000000
402202898	09/01/2011	Accepted	Lincoln National	1100000000
	09/01/2011	Not Received	Ameritas	1100000000

Figure 1 You can check claim statuses after a Web sync.

Note: Updates to the statuses of claims in eCentral will be made to the corresponding claims in Dentrix automatically when a Web sync runs.

Weekly Claim Status Checks

Make checking claim statuses a weekly task. To view claim statistics for all your outstanding claims, while logged in to eCentral, from the **Insurance** tab menu, click **claims manager** to open the **Main** page of the Claims Manager. Under **Statistics**, select a **Range** to view claim statistics for that time frame (Figure 2). The total number of claims submitted and how many were rejected appear. The total number of attachments submitted with claims and how many were rejected also appear.

To view the rejected claims for the specified range, click the **Rejected Claims** link to display the list (Figure 3). For each claim listed, you click the claim number link in the **Claim #** column to view details regarding that claim, such as the claim submission date and current status, the patient's date of birth, the procedures and fees attached to the claim, messages about the claim (such as when the carrier acknowledged the claim), and information about the billing provider, rendering provider, and pay-to provider. If you want to print this

information, press CTRL+P, and then click **Print**.

You can use this information to identify obstacles early on in the process, without poring over a report or picking up the phone. eCentral gives you the necessary information when you need it—early on—to prevent delays in payment.

Weekly Reports

One last claim tracking feature of eCentral worth mentioning is the reports. eCentral has insurance claim reports that display the status of each claim, the status of attachments, and any errors and warnings. Run these reports on a weekly basis. To view these reports, in eCentral, from the **Insurance** tab menu, click **reports manager**. Select a time period from the **Range** list. Under **Report**

Statistics	
Range:	Past 48 Hours
Total Claims	10
Rejected Claims	8 (80%)
Total Attachments	2
Rejected Attachments	2 (100%)

Figure 2 You can view claim statistics in the eCentral Insurance Manager.

Exit Search Filter | Search Type: Claim Search, Date Type: Claim Submission Date, Date Range: 9/30/11 - 9/1/11, Claim Status: Rejected

Claim # Search Attachment # Search Ins. Ref # Search

Records per page: 25 Displaying records 0 - 6 of 6

Subst	Subscriber	Plan	Submitted	Service	Claim #	eTrans Account	Claim Amount	Claim Status	Age (Days)
Crosby, L. Brent	Crosby, L. Brent	Medlife (83378)	01/01/2011	11/11/2011	232186125	Insured	\$31.00	Rejected	11
Bawa, Harmon	Bawa, Harmon	Ameritas (42003)	01/01/2011	11/11/2011	232186126	Insured	\$123.00	Rejected	11
Crosby, Stanley	Crosby, L. Brent	Medlife (83378)	01/01/2011	11/11/2011	232186127	Insured	\$31.00	Rejected	11
Bawa, Harmon	Bawa, Harmon	Ameritas (42003)	01/01/2011	11/11/2011	232186128	Insured	\$31.00	Rejected	11
Crosby, Harold	Crosby, L. Brent	Medlife (83378)	01/01/2011	11/11/2011	232186129	Insured	\$47.00	Rejected	11
Bawa, Harmon	Bawa, Harmon	Ameritas (42003)	01/01/2011	11/11/2011	232186130	Insured	\$47.00	Rejected	11
Crosby, Tim	Crosby, L. Brent	Medlife (83378)	01/01/2011	11/11/2011	232186131	Insured	\$47.00	Rejected	11

Figure 3 You can investigate rejected claims in the eCentral Insurance Manager.

Types, select the check boxes that correspond to the reports you want to view. Then, in the **Reports Manager** list, click a report name to view that report.

eCentral can simplify the task of tracking claims and prevent a lot of unnecessary phone calls to insurance companies. While you will probably still

have to contact some insurance carriers on the phone, using an insurance claim aging report and making phone calls don't have to be your main resources for tracking claims. Used in conjunction with Dentrix, the eCentral Insurance Manager can help you address problems early and get paid sooner. **DM**

Learn More

To learn more about claim tracking, visit the Dentrix Resource Center and view the eClaims Management for Dentrix webinar recording. You can also see the Managing Insurance Claims and Viewing eClaims Reports topics in the eCentral Help. See "How to Learn More" on page 2 for instructions on accessing these resources.

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Managing Unfiled Documents in the Document Center

Scan multiple documents into the Unfiled Documents folder and then assign them to sources at a later time.

■ Sean Eyring | Contributing Editor

It's Tuesday afternoon, and the mail has just arrived at your office. There are invoices, insurance EOBs, and patient correspondence that need to be sorted and placed into patient files. And you already have a growing pile of new patient information forms, patient receipts, and insurance coverage documents from today's production that are still waiting to be filed.

So what do you do with all that paper? In a perfect world where you didn't have any other responsibilities besides handling office paperwork you could organize the documents by patients and insurance companies as they crossed your desk. Then, you could scan pages individually into the Document Center and attach the documents to correct patients and insurance companies in the Document Center.

Unfortunately, we don't live in a perfect world and you need to be able to quickly scan several documents at once. With Dentrix, you can use a multi-page scanner to scan an entire "in" basket of documents at once. The documents are all placed in the Document Center Unfiled Documents folder, which acts as a catch-all for documents you have scanned but have yet to organize.

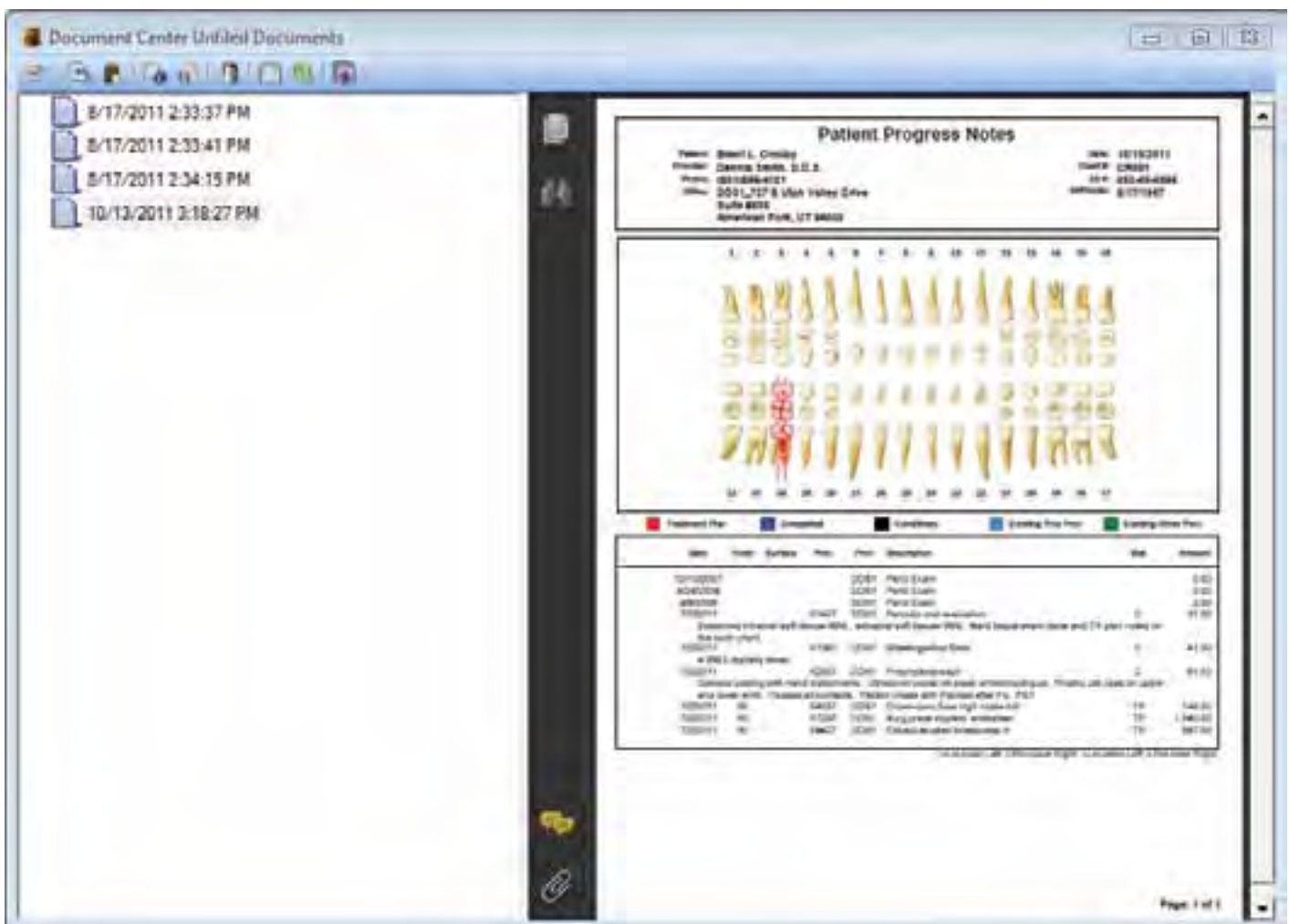


Figure 1 Click on an unfiled document to see a preview of it in the Unfiled Documents dialog box.



Figure 2 Categorize your document by assigning a document type, adding a description for clarity, and adding a note if needed.

Combining Documents

When you use a scanner to enter documents into the Document Center, each page scanned is entered as a separate document in the Unfiled Documents folder. You can combine individual documents from the Unfiled Documents folder easily.

Items in the Unfiled Documents folder are arranged by the date/time you scanned them, and you can select each individual item and preview it so you know which document you're working with (Figure 1). Preview the documents and select the documents you want to combine. Then click the **Combine Documents** button. Click the **Document Information** button to assign a **Document Type**, **Description**, and **Note** and attach the document to a source following steps outlined above. Then click **OK**.

Entering Document Information

Once you have combined documents appropriately, you need to enter information about the document so you can find it later. Select the document you want to file and click the **Document Information** button to open the **Document Information** dialog box (Figure 2). Here you have options for creating a document type, adding a description and note, and attaching the document to sources within the Document Center.

First, click the **Document Type** drop-down list and select the appropriate category or type. Several document

types are already created, but you can add, edit, and delete them to fit the needs of your practice. Then, add a description (40 characters or less) of the document for more clarity. If needed, enter a note to include additional information about the document.

Attaching Documents to Sources

Once you have selected a Document Type and entered a description and (optional) note, you can attach the document to document sources. You should attach documents to all the relevant sources so you can access that

document when you view the document center by sources other than patients. For example, if you scan an EOB into the Document Center, you should attach it to the patient and the insurance company. Then, if you want to view all the EOBs from that insurance company you can click **View > By Insurance Company** and view all the documents attached to insurance companies.

To attach a document to a source, from the **Document Information**

dialog box (Figure 2), click the **Modify Attachments** button. The **Modify Document Attachments** dialog box appears (Figure 3). Click the search button next to the type of source to which you'll be attaching the document. Select the appropriate source, repeat for all other sources, and click **OK**. The document will be moved from the Unfiled Documents folder to the source(s) you attached it to.

When you are finished attaching documents to sources, click **Close** to exit the **Modify Document Attachments** dialog box, and click **OK** to exit the **Document Information** dialog box.

With the Unfiled Documents feature, you can scan individual documents or entire stacks of documents at one time and then organize them and attach them to sources at a later time. The Unfiled Documents feature makes it easy to use the Document Center, and using the Document Center can greatly reduce the amount of paper in the already overcrowded paper files and filing cabinets you're using now and help to bring your office into the paperless era. **DM**

Learn More

To learn more about using the Unfiled Documents folder, see the following topics in the *Dentrix Help: Acquiring Unfiled Documents and Entering Document Information*. You can also visit the *Dentrix Resource Center* to view the *Storing Documents in the Document Center* tutorial.

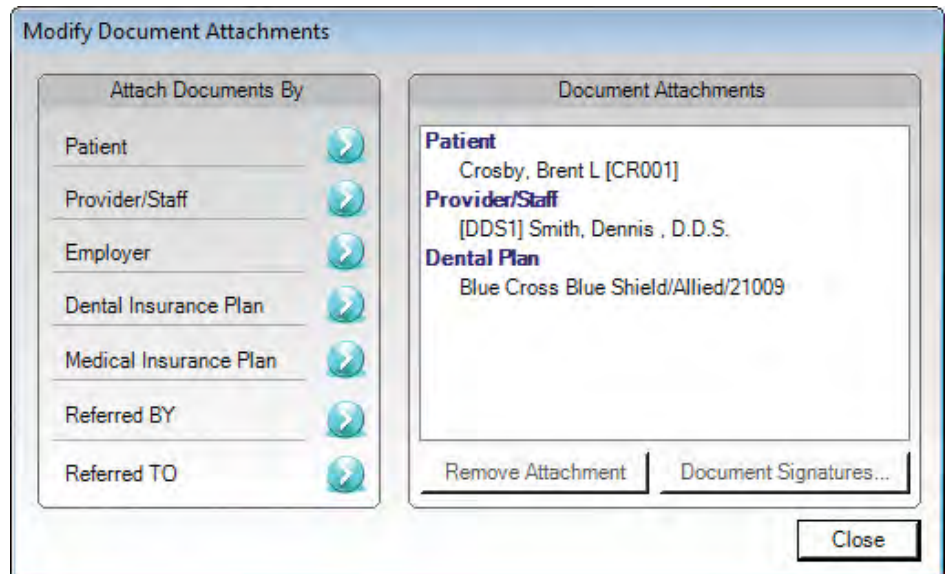


Figure 3 Attach documents to multiple sources.



Handling Negative Online Reviews

What do you do when patients post negative comments about your practice?

■ **Dr. Larry Emmott** | Speaker, Author, Consultant & Practicing Dentist

Online reviews have become incredibly powerful. Consumers view online reviews with more credibility than they do advertisements. And in some ways, online reviews have become the water cooler gossip of the Internet age. Patients (and potential patients) read online reviews and give them almost as much credence as they would a face-to-face referral from a friend or coworker.

Online reviews can be found in all kinds of places: on Facebook, community pages, Superpages, Google, and special review sites like Yelp or Dr Oogle. Reviews are easy to find, which means negative dentist reviews are easy to find too. A quick search of Google came up with these little gems:

★☆☆☆☆ "I've been to my fair share of dentists over the years and this has to be the absolute worst. It's hard for me to put into words the nightmare of this place. (And it goes on and on.)

★☆☆☆☆ "Watch out for shady practices This is one of the most expensive dental operations in the state. Watch out for their practices, which include low priced coupon offers and free exams to get you in for an exam. They'll find something wrong, and the prices they quote you are like those from a Rolls Royce dealership. THREE TIMES the average price of other dentists. AVOID if you can."

In the past an unhappy or malicious patient might sound off like that at the water cooler. That wasn't a good thing,

but at most only a couple of people would hear the rant. However, if this gets posted on Google (like the two previous examples did) then hundreds of people will see it, including every potential new patient who Googles your office to find the address or phone number.

I imagine that many, if not most, of the dentists with really negative reviews on Google and elsewhere are not even aware of them. Don't let yourself be caught in that situation. The first thing you need to do is to Google yourself. See what has been written about you online. Then sign up for a service to monitor the Internet for any mention of your name or practice.

If you do find some negative or malicious reviews, what can you do? Actually, it is easier to tell you what not to do.

Use eCentral Surveys to Collect Patient Feedback

You don't have to wait until patients post their opinions online to find out what they think of your customer service and patient care. Instead, you can ask patients to fill out an eCentral online survey about your practice. That way, patients get a chance to express their opinions, compliments, and complaints directly to you, and they may not feel the need to post negative reviews elsewhere on the Web.

eCentral can automatically email surveys to patients after their appointments. You can also post a link to the survey on your eCentral practice website, which makes it easy for patients to access the surveys. And, patients can be completely honest in their responses because the surveys allow them to give their name or just leave the information anonymous.

It's easy for you and your staff to view the eCentral survey results. The survey results are delivered directly to your eCentral account, so you don't have to go looking for patients' opinions and you can start making improvements immediately. By taking these proactive steps, you can find out what you need to improve in your practice and how you can make your patients happier, which may help reduce negative online reviews and increase positive ones.

In order to send patients surveys after their appointments, you must have an eCentral Communication Manager account. If you want to post a link to your survey on your practice website, you must also have an eCentral practice website. Browse to www.dentrix.com/getting-started/patient-survey to learn how to get started today.

Don't Sue: As reported in several news outlets, a dentist decided to file a suit when she received a negative review on Yelp which she thought was false and unfair. The result was that the doctor lost the suit because she has no legal recourse. And, to make it worse, she was ordered to pay over \$80,000 for the defendant's legal fees.

Don't Preempt: There are services that sell contracts and patient forms that supposedly prevent patients from posting negative online comments because they signed the form and agreed not to do so. There is a great deal of controversy about this because it is not clear if these machinations will protect the dentist at all. However, what does seem to be clear is that many patients find the contracts so objectionable they choose to seek care elsewhere.

Don't Panic: As professionals, our reputation is precious and we never want to see anything negative posted about us on a public forum. The conventional thinking is that negative comments need

to be removed at all costs. On the other hand, recent research indicates that a negative online review is not always bad. In the right situation it demonstrates that the reviews are legitimate patient opinions, not just positive reviews posted by staff members and family. Having some negative reviews about your practice seems to have a "blemishing effect" that actually makes the positive reviews more persuasive.

On a different note, if many of your online reviews are negative, I wouldn't blame the system. Instead, do some soul searching and find ways to reform your practice. Obviously, what you are doing is not making patients happy.

The best advice is to overwhelm negative reviews with positive ones. You can hope that some happy patients will write positive reviews on their own, but there is nothing wrong with asking your happiest patients to write a review. Be proactive.

The good news for your patients is that they have more information to help them make good choices. The free flow

of information between patients and others should ultimately improve overall patient care. The bad news is that the system is ripe for abuse, the issues are real and serious, and there is no simple solution. For now there is nothing you can do about malicious reviews. In fact, based on the case of the doctor mentioned earlier, making a stand can cost you big time.

What you can do is be aware of this growing trend. Google yourself to find out what patients are saying about your practice. And when you do get a happy, satisfied patient, ask her to write a review. The future is coming and it will be amazing! **DM**

Dr. Larry Emmott is one of the most entertaining speakers in dentistry and is considered a leading dental high tech authority in the country. You can find out more about online reviews and all aspects of high tech products and services in dentistry at his blog: www.emmottontechnology.com.



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Dentrix by the Numbers

APPOINTMENT REMINDERS

Dentrix Communication Manager automatically sends text messages, emails, and postcards to remind patients about appointments. Here's a look at how dental practices are using Communication Manager in 2011.

REMINDERS

In an average week, practices using Communication Manager send:

APPOINTMENT REMINDERS

 **40** TEXT MESSAGES

 **52** POSTCARDS

 **62** EMAILS

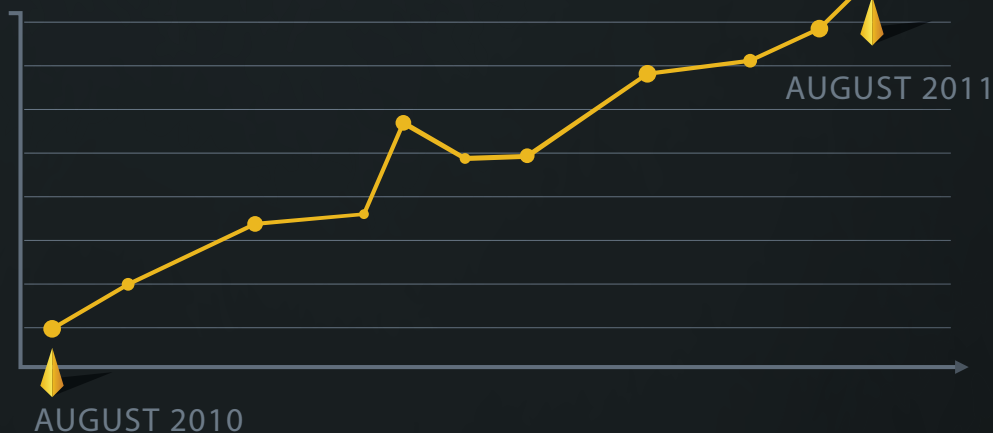
RECALL REMINDERS

 **24** POSTCARDS

 **9** EMAILS

TEXT MESSAGING ON THE RISE

During the past year, practices using Communication Manager increased their use of text messaging by more than **2,600%**



ARE YOU READY TO GET STARTED?

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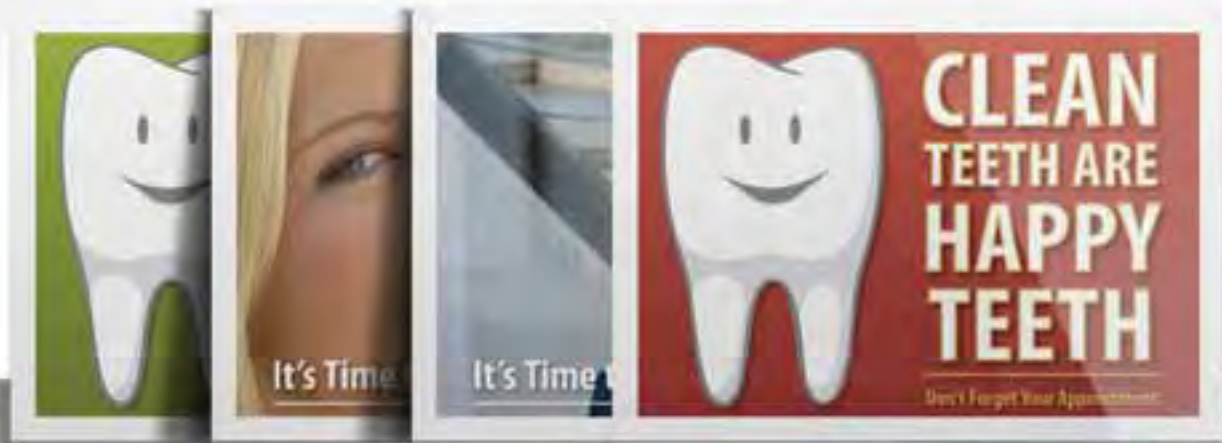
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