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MAGAZINE

Dentrix Mastery Tracks
Ready, Set, Know: Making the Most of Your Dentrix Investment

page 12

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contents

Dentrix Magazine Volume 27 Issue 1—Spring 2015

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DEPARTMENTS

12

DENTRIX MASTERY TRACKS
READY, SET, KNOW: MAKING THE MOST OF YOUR DENTRIX INVESTMENT

Give your team the tools and training they need to master Dentrix and put it to work for your practice like never before. Dentrix Mastery Tracks makes it simple.

18

PERSONALIZE CARE AND PROTECT YOUR PRACTICE WITH PATIENT PICTURES IN DENTRIX

Learn how patient pictures can help you avoid mistakes, protect your patients' identities, and provide personal service to your patients.

Reading Guide

DENTRIX
Mastery Tracks

The Dentrix Mastery Tracks™ program helps you assess and improve your Dentrix skills. Whether you're preparing for a test or just want to enhance your skills, use this reading guide to find articles in this issue of the magazine that match your responsibilities. Visit www.Dentrix.com/Mastery to learn more about Dentrix Mastery Tracks.

Clinical

Charting | Sorting Progress Notes by Column, PAGE **9**

Treatment Planning | Referring Several Treatment-Planned Procedures at Once, PAGE **10**

Financial

Billing & Accounts Receivable | Differentiating Multiple Payments from the Same Patient on End of Day Reports, PAGE **10**

Insurance | Viewing Patient Insurance Eligibility, PAGE **10**

Front Office

Continuing Care | Deleting Unused Continuing Care Types, PAGE **9**

Patient Information | Family File Time Savers, PAGE **8**
Personalize Care and Protect Your Practice with Patient Pictures in Dentrix, PAGE **18**

Scheduling | Don't Miss Easy Opportunities to Increase Hygiene Production, PAGE **24**

Practice Analysis

Practice Analysis & Security | Can You Write Me an Excuse Letter for School?, PAGE **22**
Don't Miss Easy Opportunities to Increase Hygiene Production, PAGE **24**

How To Learn More

If you want to learn more about the Dentrix topics featured in Dentrix Magazine, check out these resources.

Dentrix Resource Center
View training videos, download product manuals, search technical support articles, or study Dentrix learning plans. Access is included with a customer service plan. Log in at www.Dentrix.com/Resource-Center.

Dentrix Help Files
Explore a comprehensive list of topics or search the topics for key words. To open the Help files, from the Help menu in any Dentrix Module, click Contents.

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SPOTLIGHT

Dentrix Mastery Tracks™ allows dental professionals to test how well they understand and can use Dentrix. Read on to find out about Carla Sullivan, DMD, a doctor who has completed all eight Mastery Tracks tests and earned all four Specialist certificates.

CARLA SULLIVAN | DMD

Where do you work?
Carla Sullivan Dentistry, PLLC
Tulsa, Oklahoma

What is your title?
General Dentist/Owner

How long have you been with your practice?
2 years

How long have you used Dentrix?
I have been using Dentrix for five years now, and I recently transitioned my practice to Dentrix.

Which certificates have you earned?
Dentrix Front Office Specialist, Dentrix Financial Specialist, Dentrix Practice Analysis Specialist, Dentrix Clinical Specialist

How has participating in Mastery Tracks helped you use Dentrix?
Personally, I think it's important to know as much as possible about my practice and the way it runs. I participated in the Mastery Tracks program because I want to know that I am competent in utilizing all areas of my practice management software.

What benefits do you think the Mastery Tracks program will have for your team?
The Mastery Tracks program will help not only new team members but also current team members learn and utilize all of the features that Dentrix has to offer. This is the only program that I know of that can be used to affordably evaluate your Dentrix skill level. It is a great assessment tool. The Mastery Tracks evaluation actually helps me identify learning and training needs that I might not otherwise be able to recognize.

What is your favorite Dentrix tip or trick?
There are so many! I always look forward to the latest tips on Dentrix Tip Tuesday on Facebook. My favorite report in Dentrix is definitely the Practice Advisor Report. As a dentist, it's so nice to run a report and easily track how my practice is progressing towards our goals. If the Dentrix software is set up and used correctly, it saves me so much time in analyzing practice data, leaving me more time to focus on patients.

Is your team ready for your success? Visit Dentrix.com/Mastery and start using Dentrix Mastery Tracks to give your team the tools they need to measure and improve their Dentrix skills.

Dentrix News

▼ New Family Reminders and Mobile-Friendly Templates in eCentral

DENTRIX
Communication Manager

The latest update to eCentral addresses a highly requested feature: the ability to send one reminder for a family with multiple same-day appointments. eCentral now has new email, text message, and printed postcard templates specifically for family appointments.

Each type of reminder includes the names of all the family members with an appointment that day. The email and postcard reminders also include the starting time for each appointment, while the text message reminder provides the starting time for the first appointment.

This enhancement eliminates situations where a father or mother receives a separate reminder for each member of the family—and via multiple delivery types. It also reduces late and missed appointments due to confusion created by multiple reminders.

You can see which family member received the reminder from the eCentral dashboard. The dashboard displays the name of the family member who was sent the reminder, along with a list of the family members that were included, for all reminder types. You can even see which email reminders were viewed.

The recipient of the family reminder can confirm the appointment for the entire group with a single reply. The confirmation updates all the family members' appointments in Dentrix with the confirmed status automatically.

This update also eliminates multiple reminders for same-day appointments for an individual patient. For example, when a patient has an appointment with the hygienist, followed by an appointment with the doctor, the system will only send the reminder for the hygiene appointment.

In addition to the family reminders, eCentral also now has email reminders formatted for mobile devices to make it easier for patients to read and interact with the reminder when using a mobile device. This mobile optimization meets the demands of a rapidly growing smartphone market where the majority of emails are now opened on a mobile device.

The new family reminder templates are located in the Family tab in the Email/Postcard Campaign section and in the Text Message Campaigns section of eCentral. Mobile optimized email reminders are designated by a blue banner in eCentral's template library. For more information about eCentral, visit www.dentrix.com/eCentral or call 800-734-5561, option 2.

HI Will,

Remember that Jack and Mary have dental appointments Saturday, October 25.

Jack at 3:00 PM
Mary at 3:30 PM

Smile
Come in — it's time for your appointment.

We look forward to seeing you —

▼ New Dentrix Mastery Tracks Tests

DENTRIX®
Mastery Tracks

In February 2015, Henry Schein released a new clinical track for Dentrix Mastery Tracks™. The new track includes two tests that assess Dentrix charting and treatment planning skills. With the release of the new tests, Dentrix professionals can now assess their skills in four tracks: Front Office, Financial, Practice Analysis, and Clinical. Mastery Tracks provides a fast, affordable way for Dentrix professionals to find out how well they understand and can use the capabilities in Dentrix. The program also helps users identify areas where their knowledge is lacking and find the targeted training they need to improve their skills.

Dentrix Mastery Tracks features tests that align with specific job functions and responsibilities in a dental practice. Users can test their Dentrix skills in scheduling, continuing care, billing and accounts receivable, insurance, charting, treatment planning, reporting and security, and patient information. After successfully completing each test, users receive a skill certificate recognizing their competence. When users successfully complete all required tests for a specific Mastery Track, they receive an official Dentrix Specialist certificate to signify their competence in that practice management area.

To help users strengthen their skills, Dentrix Mastery Tracks offers a complete range of online and in-person Dentrix learning options, including test blueprints, hands-on workshop training, in-office training, an online resource center for self-paced training, and other publications, such as *Dentrix Magazine* and the Dentrix eNewsletter. These tools can help team members prepare for tests and fill any knowledge gaps that become apparent after completing tests.

To create an account, select tracks, and take tests, visit www.Dentrix.com/Mastery. Downloadable test guides, FAQs, and a video overview are also available on that page.

▼ Automatically Collect and Post Patient Reviews Online with eCentral

As if dentists don't already have enough to worry about, managing an online reputation has become an aspect of the dental business that can't be ignored. However, few dentists have time to dedicate to this need. eCentral answers the call with a new feature for boosting your online reputation automatically so your office can focus on dentistry.

Now patients can rate your practice using a star-rating scale and submit a patient review as part of the post-appointment survey. Reviews that accompany a high rating, based on your preferences, are automatically published to your practice website. Patients submitting a favorable review are also prompted to post their reviews to popular social media sites, including Facebook, Google+ and Yelp, through convenient links within the survey response form.

The proactive promotion of positive reviews effectively neutralizes any negative reviews by offsetting them in numbers and pushing them down the list. And, since only positive reviews are promoted, you are given a better opportunity to resolve any negative situations privately, before they result in a negative online review.

The patient review dashboard allows you to see which reviews were automatically posted to your website and add or remove reviews based on a more detailed examination of the content. The dashboard also provides an overview of your practice rating and other useful statistics.

For directions on setting up patient reviews, click Help in the upper right corner of eCentral, then click Communication Manager, and then Surveys and reviews. For more information about eCentral, visit www.dentrix.com/eCentral or call 800-734-5561, option 2.
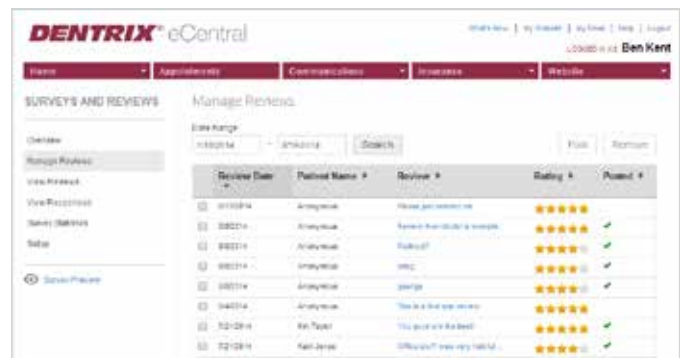
▼ Announcing New Insurance Payor Connections

Electronic claims: Dentrix now has an eClaim connection with the following 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
CKOH2	Care Source (OH)
62154	Denta Quest- Government Plans (TN)
58182	NAPHCARE
TLY35	Total Dental Administrators- UT
CUSVI	U.S. Virgin Island Medicaid

Electronic Explanation of Benefits: You can now receive electronic explanations of benefits (eEOB/ERA) from the following payors.

PAYOR ID	PAYOR NAME
43168	Advantica
47198	Blue Cross Blue Shield of California-Anthem
84099	Blue Cross Blue Shield of Colorado
84105	Blue Cross Blue Shield of Connecticut- Anthem
CBGA1	Blue Cross Blue Shield of Georgia
84103	Blue Cross Blue Shield of Georgia FEP (Colorado Springs, CO)
84105	Blue Cross Blue Shield of Indiana- Anthem
84105	Blue Cross Blue Shield of Kentucky-Anthem
84101	Blue Cross Blue Shield of Nevada (No FEP claims)
84105	Blue Cross Blue Shield of Ohio-Anthem
CB950	Blue Cross Blue Shield of Wisconsin
CB923	Blue Cross of Virginia (Trigon)
00700	Blue Care Family Plan (BC/BS of CT)
GWD01	Blue Care Family Plan (Goldenwest)
82029	Delta Dental of Idaho
CDOK1	Delta Dental of Oklahoma
GWD01	Golden West Dental (Woodland Hills, CA)
EM350	MED3000 CMS EARLY STEPS
81883	Municipal Health Benefit Fund
65088	Preferred Care Partners
80314	Reliastar (CA)
84102	Rocky Mountain Life Dental
84103	Trigon Blue Cross Blue Shield
80314	UniCARE Special Accounts
80314	UniCare Major Accounts (UniCARE Life/Health/ Mass)

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

Call 800-734-5561 to enroll for eClaims or for help setting up any Dentrix eServices.

Achieving Your Practice Goals

Learn the difference between "lag" vs. "lead" indicators and how Dentrix Profitability Coaching can help you understand the business principles needed for your practice to succeed.

■ **Brad Royer** | Dentrix Product Manager

As I've visited dental practices across the country, I've met extraordinary people striving to run a successful dental business. I love to talk to them about their vision for the business. In fact, one of the first things I do after meeting the team is to look around the office for "the practice goals whiteboard." Maybe you're smirking and thinking, "Yeah, we have one of those." I would venture to guess that it was put there for the same reason most offices use them: to ensure that each staff member is working toward the same objectives. I have joined some practices for their daily morning huddle around "the whiteboard," where the office manager discusses the day's goals and objectives and then reviews the prior day's accomplishments and shortcomings. I think we would all agree that a daily discussion of the goals and a constant visual reminder is important. But I would daresay, it is not enough. This is evident to me as I begin to ask different team members about those goals on their office whiteboard.

No matter what position the team member holds in the practice, my question is always the same: "What are you going to do today to influence the goals your office has set?" The answer is almost always something like, "I don't know. The same things I do every day, I guess." As I continue to ask questions, it becomes clear that while they know the goals (in some cases they are tied to their quarterly bonus), they don't know how to influence the goals in their specific role in the practice.

I believe the reason for this disconnect often has to do with a basic understanding of the difference between "lag" vs. "lead" indicators.

The practice goals that end up getting measured are often lag indicators—these are backward-focused or "trailing" indicators that measure only performance data that has already been collected. Office and provider production are examples of lag indicators—they show what has already been produced. Lead indicators, on the other hand, are generally seen as a prediction of things to come. For example, as a hygienist, you can positively affect lead indicators by scheduling recare patients or necessary follow-up treatment before the patient leaves the chair to check-out.

For each lag measure, there are a number of lead indicators that can be affected by each role in the practice. While the previous example was an obvious one, sometimes it's more difficult to find all the appropriate lead indicators for a specific lag measure. In fact, your office may have already tried to adjust a number of these lead indicators with little or no impact on the goals.

At Henry Schein, we have a program that can help. Dentrix Profitability Coaching has assisted numerous practices to understand these lead indicators, how they affect your goals, and the ways in which each member of the staff can positively influence them. Using the Practice Advisor Report and Daily Huddle Report to analyze your practice, our coaches can teach your team effective solutions to achieve your practice goals.

In fact, after just six months in the coaching program, the average customer has increased collections by over $8,000 per month. This is an annualized over 1,600 percent return on investment from the program. After completing the coaching program, Dr. Kenton Ross of Fayetteville, Arkansas, was asked what value he would place on the program. He answered, "Priceless. After being flat for over five years, we've seen a tremendous jump in our bottom line."

Dr. Roger Levin, DDS, founder of the Levin Group said, "Dentistry has entered into a new economic reality that is reshaping the profession. The resulting structure will require dental professionals to acquire and apply real world business principles and methodologies to remain fiscally healthy."[2] Keep this in mind as you look at 2015 and consider how to continually grow your business.

Dentrix Profitability Coaching will teach you these business principles and much more. For a limited time, you can receive a free Practice Advisor assessment. To learn more, please visit www.dentrix.com/promotions/freepaassessment. **DM**

> After just six months in the coaching program, the average customer has increased collections by over $8,000 per month.

[1] www.dentalaegis.com/idt/2013/12/trends-in-dentistry

DENTRIX WORKSHOPS 2015

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$299 per person — 1-day class for experienced Dentrix users 9 am–5 pm

Accounts Receivable Management
Take control of your patient A/R — **6 CE CREDITS**

Learn to simplify the billing statement process, enhance the effectiveness of collections efforts, and properly track and manage important A/R routines.

$299 per person — 1-day class for experienced Dentrix users 9 am–5 pm

Continuing Care Management
Optimize your continuing care system — **6 CE CREDITS**

Gain an in-depth understanding of how to correctly bill insurance in order to increase claim acceptance and collect more quickly and easily.

$299 per person — 1-day class for experienced Dentrix users 9 am–5 pm

Treatment Planning and Case Presentation
Create and present treatment options effectively — **6 CE CREDITS**

Learn in-depth how to create, customize, present and manage patient treatment plans for improved patient education, case acceptance and documentation.

$299 per person — 1-day class for experienced Dentrix users 9 am–5 pm

Essentials Workshop
Master the basics — **12 CE CREDITS**

Become familiar with the essential Dentrix features that will help you work more effectively in your practice, and make your daily routines easier and more efficient.

$449 per person — 2-day class for newer Dentrix users 9 am–5 pm

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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.

Family File Time Savers

Dentrix has lots of little time-saving features that really add up throughout the day. You can take advantage of several of those time savers when you enter new patients in the Family File.
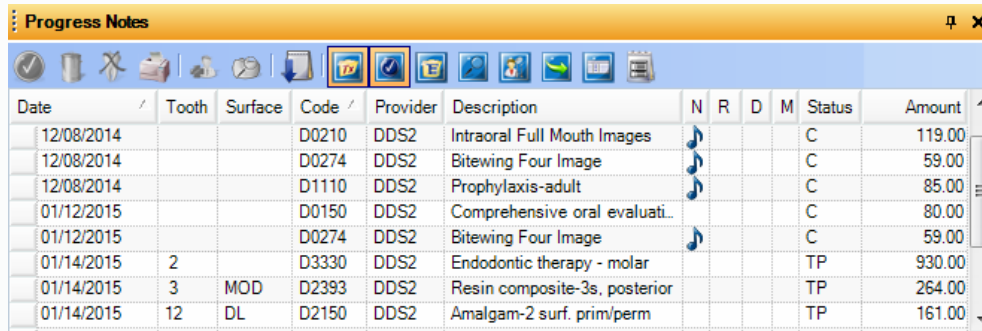
- In fields that require you to type patient information (**Name, Salutation, Address**, etc.), you don't have to capitalize the words you enter. Dentrix does that for you! Simply type the information and use the **Tab** key on your keyboard to advance to the next entry field (or manually click the next entry field), and Dentrix will capitalize the first letter for you. **Note:** The exception to this rule is the **Email** field, which won't automatically capitalize the first letter.
- When entering information in date fields (**Birthdate, Consent** date, **Visit** dates, etc.) you can enter a string of numbers with two digits for day, month, and year without any spaces or punctuation (for example: 052376) and then **Tab** to the next field. Dentrix will automatically convert your entry to a corresponding date with a four digit year and appropriate punctuation (05/23/1976).
- For the **Phone** and **SS#** fields, you can just enter a string of numbers and Dentrix will convert it into the appropriate groupings for you. **Note:** Phone numbers must include a 3-digit area code followed by a 7-digit phone number, and the SS# should consist of a 9-digit number for the automatic conversion to work properly.

As mentioned in the above tips, use the **Tab** key on your keyboard to advance through the different fields you need to fill out in dialog boxes, it will save you time in having to move your cursor to a new field with the mouse. Fewer clicks saves you time in the long run!

Sorting Progress Notes by Column

Did you know you can change the way the progress notes in the Chart are sorted? You can sort by any of the columns in the progress notes by clicking the column heading. Clicking the heading once sorts the list in descending order, and clicking it again sorts the list in ascending order.
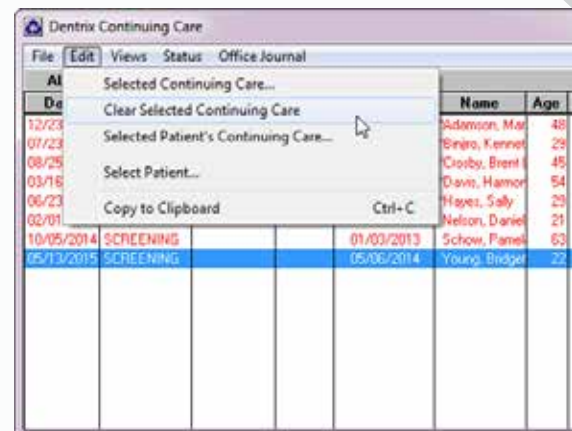

Do you want to look at the history of procedures performed on a certain tooth? Click the **Tooth** column to sort the progress notes by tooth. Or, if you want to view the notes by provider, click the **Provider** column to sort them that way. Having the ability to sort progress notes makes it easy to find information you would otherwise have to search through manually. And when you're done, you can click the **Default Sort** button to restore the progress notes to their original sort order.

Deleting Unused Continuing Care Types

When you're cleaning up your continuing care types, Dentrix won't allow you to delete a type that is still assigned to patients and will give you an error message. Don't worry though, can still delete the continuing care types you are not using.

First create a temporary view:
1. From the Appointment Book, click the **Continuing Care** button. The Continuing Care module appears.
2. From the Continuing Care module, click **Views > Temporary View**. The **Temporary Continuing Care View** dialog box appears.
3. Select the continuing care **Type** you want the list to include from the drop-down options (the type you want to delete) and select the **With CC** option.
4. In the **Due Date Span** group box, the increments should be <ALL> to <ALL>.
5. Make sure that all other filters are set to <ALL>.
6. Click **OK** to load the temporary view.

This view contains a list of all patients currently attached to the type you want to delete. Select a patient from the list and click **Edit > Clear Selected Continuing Care** to clear the continuing care type. Then click **OK** to the confirmation message that appears. Once you have cleared the continuing care type from each patient on the list, you can then delete it.

To delete a continuing care type once it has been cleared from all patients:
1. From the Office Manager, click **Maintenance > Practice Setup > Continuing Care > Continuing Care Setup**. The **Continuing Care Setup** dialog box appears.
2. Select the continuing care type you want to delete. Click **Delete**. A warning message box appears.
3. If you want to delete the continuing care type, click **Yes**.

Viewing Patient Insurance Eligibility

Are you looking for a fast way to see if a patient is eligible for insurance benefits on the day of treatment? You can quickly see a patient's eligibility status with the **Eligibility** icon located in the upper right corner on the face of the appointment:

- A blue E on a white background indicates that the patient is eligible for benefits, and the description in the **Appointment Information** dialog box reads YES.
- A gray E on a yellow background indicates one of the following:
  - The patient's eligibility could not be verified, possibly because of incorrectly entered or missing information. The description in the **Appointment Information** dialog box reads OTHER.
  - The patient's eligibility has not been checked or entered for the past five days.

If the **Eligibility** icon does not appear, and the description in the Appointment Information dialog box is blank, the patient's eligibility has never been checked or entered.

When you call to verify eligibility, you can manually enter insurance eligibility information by double-clicking an appointment in Appointment Book to open the **Appointment Information** dialog box. Right-click on the **Eligibility** icon, and select **Enter Eligibility Status**. In the **Eligibility Status** dialog box, select a status and enter a description, expiration date and note. Click **OK** to save.

If you are using the eCentral Insurance Manager, insurance eligibility is updated in Dentrix automatically.

For more information, log in to the Dentrix Resource Center and search for article #58049 titled Checking Patient Insurance Eligibility.

Differentiating Multiple Payments from the Same Patient on End of Day Reports

Have you ever looked at a Family Ledger Report, walkout statement, billing statement, or deposit slip and thought to yourself, "I could have sworn this patient made two credit card payments, and only one is listed here. Why aren't both payments being listed?"

If you have two (or more) separate payments from a patient that are posted on the same day using the same payment type, Dentrix combines those payments into a single entry on reports. If you want multiple payments to be listed separately, you can get them to itemize on the report by entering unique details in either the **Check #** or **Bank/Branch #** fields of the **Enter Payment** dialog box. That way Dentrix will see that the two payments are different and list them separately on the reports.

Referring Several Treatment-planned Procedures at Once

At times a patient may have several procedures or a series of procedures that you are referring to a specialist. While you can edit each procedure individually and add the referral to each one, this process can be simplified by using the Treatment Planner to add a referral to a group of procedures at once.

To refer several procedures at once:

1. Select the appropriate patient in the Patient Chart, and then open the Treatment Planner.
2. Click the **New Case** button and create a new treatment plan case called "For Referral."
3. Click and drag the procedures you want to refer from their current treatment-planned case into the "For Referral" case you created.
4. Select the "For Referral" case and click the **Update Case Status** button, and select the **Referred** status. The **Update Current Case Status** dialog box appears.
5. Click the **Referred** search button (>>) to select the provider to whom you are referring the procedures. Enter a **Comment** as needed in the field provided.
6. Click **OK**.

The case will be marked as Referred. All the procedures in the case will be marked as referred in the Progress Notes, and the procedure amounts will be zeroed out.

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- Collect and manage accurate patient information
- Improve and simplify schedule management
- Streamline patient payments and track practice profitability
- Keep your database up to date and properly backed up

Learn about exciting new features coming soon in Dentrix G6, including:

- Split payments by family member
- Assign correct providers for completed procedures in the Appointment Book
- Unify your business and patient contacts and create custom patient lists
- Add more detail to patient medical alerts

DENTRIX

HENRY SCHEIN®

READY, SET, KNOW:

Making the Most of Your Dentrix Investment

Give your team the tools and training they need to master Dentrix and put it to work for your practice like never before. Dentrix Mastery Tracks™ makes it simple.

Is your practice thriving or merely surviving? Today's prosperous practices have discovered that quick, efficient, personalized care is the secret to happy patients and maximum profits. And that kind of care is achieved when every member of your team has mastered their role.

In an office staffed with experts, patients check in faster, wait times are shorter, billing is more efficient and scheduling is convenient for you and your patients alike. The quality of care goes up and your team reacts with agility to handle unexpected needs on the fly.

As a Dentrix user, you already have a set of powerful practice management tools at your fingertips to help your office run at the peak of efficiency. But the system's advanced features and capabilities can't be of much help if they aren't put to use.

Now there's an easy way to get more out of Dentrix. It's called Mastery Tracks, and it can completely transform your practice.

Dentrix Mastery Tracks presents a novel approach to skills assessment. With topics and tracks that align with key job functions, it assesses your team's knowledge of Dentrix and shows where they need improvement. Then the program makes it easy to fill in any knowledge gaps with a wealth of targeted training resources.

Think of it like this: You've put a lot of time and effort into building the practice you have today—and that includes investing in the right people to be on your team and the right technology to run your business. Dentrix Mastery Tracks helps you make the most of your Dentrix investment, and get more out of the investment you've made in your staff. The program helps your knowledgeable staff become Dentrix specialists who work more efficiently, deliver better patient care and take even more pride in their jobs well done.

How it Works

Mastery Tracks is a convenient online program that assesses employees on a range of Dentrix skills that match their assigned duties in the practice. Every member of your team can benefit from this program, with four specific "tracks" to match various roles and responsibilities:

Front Office Mastery Track – Discover your team's ability to effectively and efficiently create and maintain detailed patient and family records, schedule appointments, manage patient correspondence and coordinate continuing care. *Ideal for: Scheduling coordinators, receptionists or other front-office team members who routinely manage patient information and appointments.*

Financial Mastery Track – Assess employee proficiency in setting up and entering financial transactions, managing accounts receivable, creating accurate financial reports, setting up insurance plans, verifying insurance eligibility and processing claims. *Ideal for: Financial managers, insurance and billing coordinators and anyone else who maintains financial information, processes payments or works with insurance claims.*

Practice Analysis Mastery Track – Learn how well team members generate and customize reports, export and manage data and use password management and audit tools effectively. *Ideal for: Practice administrators and office managers who work with productivity and performance reports, or anyone who manages passwords or other security settings.*

Clinical Mastery Track – Measure team member capacity to navigate and use Dentrix charting, progress notes and clinical notes, and other Dentrix tools to improve patient care. *Ideal for: Dentists, dental assistants, hygienists and other team members who are directly involved with clinical care and treatment planning.*

Mastery Tracks is not just testing. Mastery Tracks also provides a wealth of learning resources to help your team improve their Dentrix skills where necessary. Before taking the test, team members can view test "blueprints" for their area of specialty to see what types of things they'll be tested on. They can then study topics via videos, articles, classroom workshops or live in-office training sessions.

After an employee takes a test, they'll receive a skills certificate if they pass (Figure 1). If they don't pass on their first try, no problem. They'll get feedback on items they missed and can even retake the test another time—absolutely free. Once they pass all the tests in their chosen track, they will receive a specialist certificate they can download or print out to prove their competence (Figure 2).

And skills assessment has never been so affordable:

- Standard price per test is $29.95.
- Save $5 per test when you sign up for all of the tests in a specific Mastery Track.
- Every test purchase includes one free retake if you don't pass on your first attempt.

Figure 1 Skills Certificate

Figure 2 Specialist Certificate

With Mastery Tracks, Everybody Wins

Dentrix Mastery Tracks is a plus for everyone, from dentists and practice administrators to clinical and front-office staff.

The easy, affordable program can become a handy way for administrators and office managers to evaluate applicants to find the most qualified candidate; assess new employees' skills to help them get up to speed quickly; and even serve as a resource for yearly performance reviews and pay raises.

Team members benefit from the satisfaction of an official way to demonstrate their skills and proficiency. They can use Mastery Tracks skills assessment and training to progress in their careers and gain trust and greater responsibility as their expertise grows.

Even your patients win with Mastery Tracks. With a staff of Dentrix specialist, your practice will run more efficiently. Complete proficiency in the comprehensive features of your Dentrix practice management system frees up time and streamlines workflows—leaving your team more available to build relationships with patients and ensure that each visit is a convenient, productive and pleasant one.

Benefits at a Glance

- **MAXIMIZE** your Dentrix investment.
- **MOTIVATE** staff to improve skills.
- **GIVE** every team member a way to add value.
- **MAKE** smarter hiring and training decisions.
- **ENHANCE** the patient experience.
- **TRAIN** when it's convenient for you.
- **CREATE** a more productive, profitable practice.

Testing and Assessment 101

- Each test has 35 to 60 multiple-choice and simulation questions. About 75% are simulations, which require completion of specific tasks.
- No sign up fees. Pay for tests only when you are ready to take them.
- Tests are timed and last 50 to 75 minutes, depending on the test.
- Test results are provided on-screen immediately after completing a test.
- If you fail a test, the system will show you the areas you need to study and offer links to recommended learning resources.
- You can retake a failed test once for free after a 24-hour waiting period.

"Dentrix Mastery Tracks helps your knowledgeable staff become Dentrix specialists who work more efficiently, deliver better patient care and take even more pride in their jobs well done."

All the Training and Information You Need to Succeed

We're committed to providing the tools your team needs to master their selected tracks. Learning resources include:

Test Blueprints

These detailed outlines highlight exactly what you need to know to successfully complete each Mastery Tracks test.

Live Training

Attend a Dentrix training workshop in your area, travel to our intensive three-day Business of Dentistry conference or bring a certified Dentrix trainer right to your office for in-depth, personalized training on crucial Dentrix concepts and skills.

Dentrix Resource Center

This extensive online repository contains Dentrix learning plans, on-demand training videos, user guides, knowledgebase articles and more. Unlimited access to the Resource Center is included with all Dentrix Customer Service Plans.

Dentrix Learning Edition

If you don't have access to the Dentrix software, install this limited-use version of Dentrix and use a corresponding study guide to walk through important Dentrix features and complete practice exercises.

Other Independent Learning Resources

Read *Dentrix Magazine* and the Dentrix eNewsletter for valuable tips and tricks on a variety of Dentrix features.

Start Your Success Today

Is your team ready for your success? With Dentrix Mastery Tracks, they will be. Getting started is fast and easy. It only takes a few minutes to create an account and begin taking tests:

1. Visit Dentrix.com/Mastery.
2. Help your team select the tests and tracks that match their duties.
3. Complete Mastery Tracks tests at your convenience.

Learn more today at www.Dentrix.com/Mastery.

Personalize Care and Protect Your Practice
with Patient Pictures in Dentrix

Roger Gagon, Senior Editor

Learn how patient pictures can help you avoid mistakes, protect your patients' identities, and provide personal service to your patients

If you work for a large dental practice or have ever trained a new front-desk employee, you know that recognizing patients when they enter your office can be challenging. Have you ever greeted a patient with a warm, "Hello Mrs. Donaldson," only to have the patient respond with a cool, "the name's Sharon Winkowski—I was in last week." Of course you want to provide personalized service without having to ask patients (especially established ones) for their name. But with so many patients, how can you be certain you have the right name with the right face?

The Dentrix Patient Picture feature can help you solve this problem, and can also help you protect your patients' privacy and detect and prevent identity fraud. This article reviews some of the benefits of storing patient pictures in Dentrix and offers a few tips to help you get started using this feature.

Benefits of Patient Pictures

Taking patient pictures and storing them with your Dentrix patient records provides several important benefits. For starters, it helps office staff (especially new staff) learn your patients' faces before they arrive, so your staff can recognize patients instantly and provide more personalized service. Likewise, patient pictures can help prevent embarrassing mistakes with billing and recare scheduling during checkout.

Using patient pictures could help you avoid even bigger mistakes—those involving patient care. According to an article published in the

June 26, 2012 issue of HIMSSwire, a news service covering healthcare issues, using patient photos in one hospital's EHR system was shown to reduce the risk of putting an order on the wrong patient's electronic chart. During the 15-month study where patient pictures were used, no patient whose picture was included in their EHR verification screen received unintended care because of an erroneous order in their chart. However, the same hospital reported that at other times when patient pictures were not always used, in almost all of their "near misses" a patient photo was not included. Daniel Hyman, the hospital's chief quality officer, said, "I do think it's the photos that made the difference." While this study took place in a hospital, it's not difficult to see how the findings can be applied in a dental office.

Storing photos of parents and guarantors in your Dentrix database can offer additional protection and peace of mind when providing dental care for children. For example, photographs make it easier for your staff to verify the identity of a parent or legal guardian who gives consent for treatment or who leaves with a child after an appointment.

Patient pictures can also provide some legal benefits. In the event of a lawsuit or fraud, patient photos can provide evidence to support your case. Identity theft has been on the rise in recent years, and it pays to protect your office and your patients. Consider a case that happened a few years ago in California where a woman used someone else's identity and insurance information to receive over a thousand dollars' worth of dental work. Fortunately, this particular dental office had been taking patient pictures and storing them in Dentrix. When the identity theft was eventually discovered and reported to police, who subsequently came to the dental office to investigate, office staff were able to provide an actual patient photograph of the person who committed the insurance fraud. The photograph was entered into evidence and used to help track down and prosecute the offender.

Taking patient pictures also allows you to spend a little extra time with new patients when they arrive for their first visit. This can help them feel like they're forming a long-term relationship with you and your practice, which may help with patient retention.

These are just some of the ways you may find patient pictures to be helpful in your practice. If individuals or parents object to picture taking, respect their wishes and let them know you can always add a patient picture later should they change their mind. (Reassure your patients
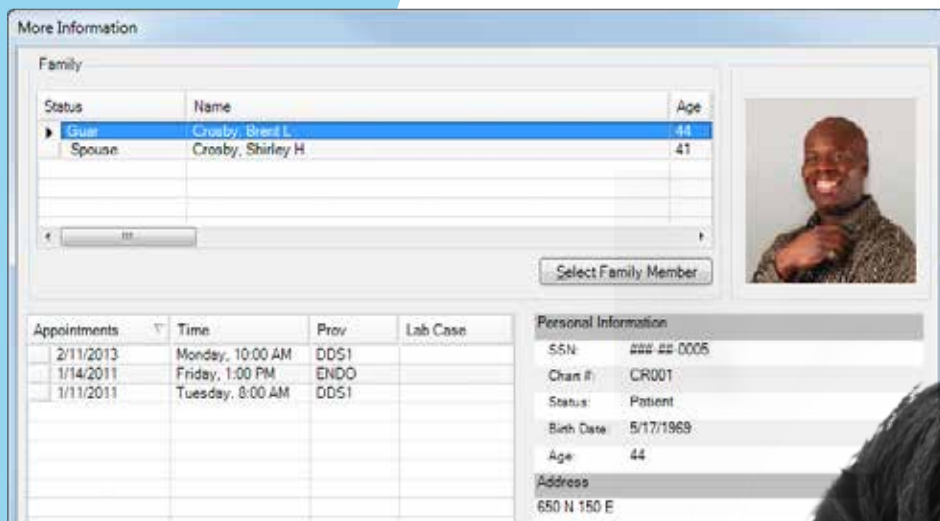
Figure 1 The More Information dialog box.

that their pictures will only be used for identity verification in the office and that you will never post them anywhere or use them without their consent.)

Using Patient Pictures in Dentrix

After you add a patient picture in Dentrix, you can view it by clicking the **Patient Picture** button on the toolbar in the Family File, Patient Chart, and Treatment Planner modules. The patient picture also appears in the **More Information** dialog box (Figure 1), which you can access by clicking the **More Info** toolbar button in the Family File, Appointment Book, Ledger, Patient Chart, Treatment Planner, Treatment Manager, Lab Case Manager, Document Center, and Questionnaires modules. If you're using Dentrix G4 Productivity Pack 7 or later, whenever you hover your mouse over an appointment in the Appointment Book, the Hover window displays the patient's photograph along with other patient information (Figure 2). At the beginning of the day you can use the Hover window to quickly view the patient photos for all the patients on your daily schedule so you are familiar with them. Then as patients arrive for their appointments, you can glance at their photo in the Hover window again to make sure you have their name correct before you greet them.

Taking Patient Pictures

Before you begin taking pictures of your patients, take some test shots of coworkers. Use different camera settings, locations, and backgrounds to make sure you are capturing the best possible picture. You'll want a high image quality that is consistent in all your patient pictures, so take some time to figure out how to best achieve that. You may want to select a location that is away from windows (especially east and west-facing ones), where sunlight, shadows, glare, and weather can produce inconsistent
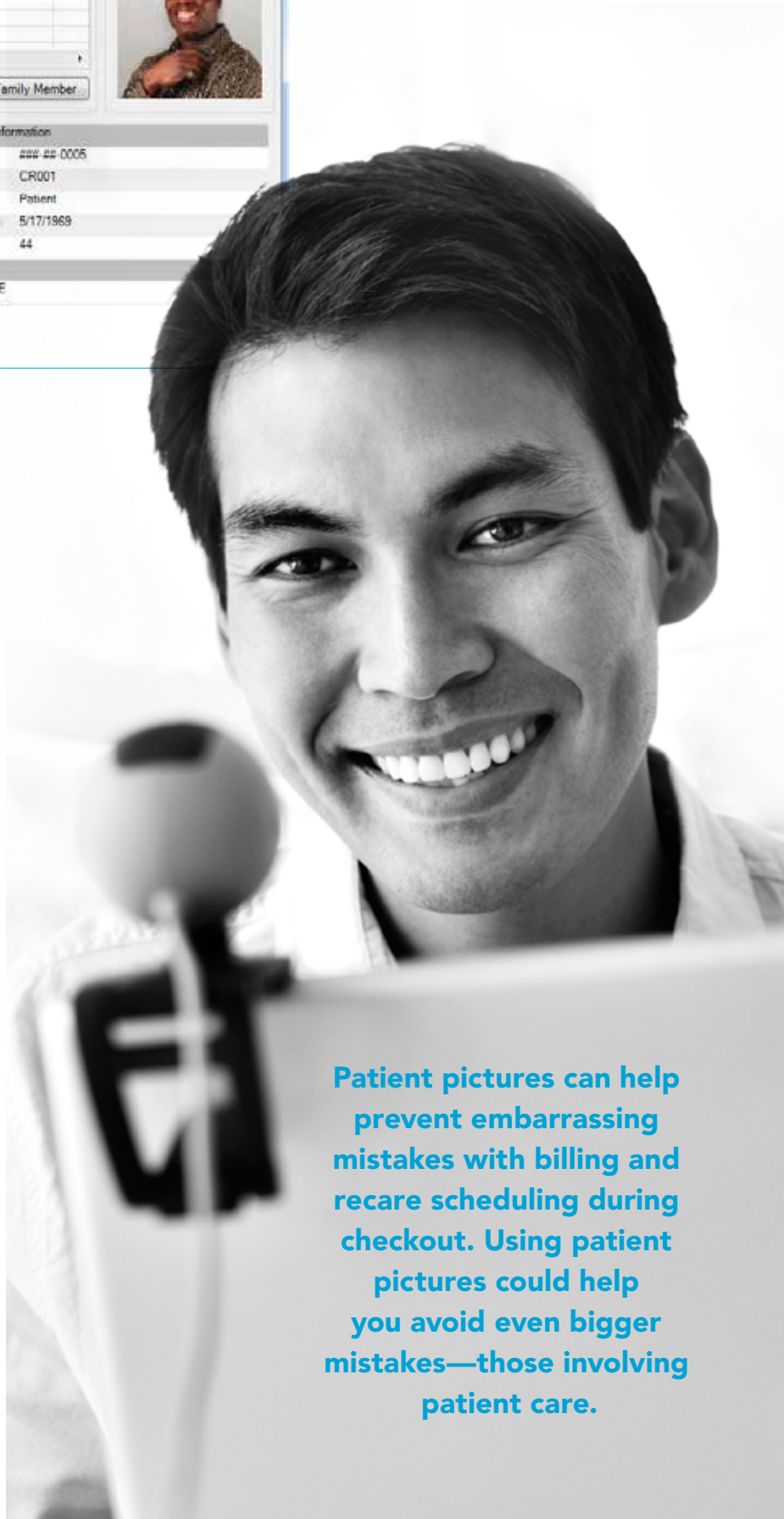
Patient pictures can help prevent embarrassing mistakes with billing and recare scheduling during checkout. Using patient pictures could help you avoid even bigger mistakes—those involving patient care.

lighting. It's best to choose a simple, non-reflective background, such as a wall with light-colored paint or wallpaper. If you use a camera flash and find that it is creating shadows on the wall behind your subject, you may want to point the flash up at the ceiling (if that is an option on your camera) or simply turn the flash off and experiment with more room lighting or a higher ISO (or ASA) setting on your camera.

Figure 2 The Hover Window.

To add patient pictures in Dentrix, with a patient selected in the Family File, Patient Chart, or Treatment Planner, click the **Patient Picture** button on the toolbar to open the Dentrix Patient Picture window (Figure 3). You can add a patient picture by acquiring it from a digital camera or webcam attached to your computer or by importing a file that you

Figure 3 The Dentrix Patient Picture window.

have copied to your computer from your camera's memory card. To acquire an image from an attached camera, click the **From Device** button. If you have copied the images to your computer, click the **Import from File** button, navigate to the file, and click **Open**.

If you plan to take pictures on a portable digital camera and upload them to your computer later, make sure you record the patient names with the photo numbers from your camera so you don't get confused about who is who after patients leave your office. You may want to maintain a picture log on a notepad or in a computer spreadsheet file until you're ready to upload the pictures.

Once the image files are saved on your computer, you may want to rename the files to use the patients' names, such as BrentCrosby.jpg. This can help with housekeeping later when you are no longer seeing certain patients in your office.

Image Editing

Most cameras take pictures using a 3:2 aspect ratio, like a 4" x 6" photograph. Patient Pictures look best in the Hover window when they are cropped to a square, as shown in Figure 2, so you may want to get in the habit of cropping all your patient pictures to a square. You can do this using the Patient Picture crop tool on

the toolbar; however, this might be easier to do using Microsoft Paint (which is part of Windows). MS Paint displays the number of vertical and horizontal pixels in your crop area on the status bar, so you can crop your image to be the same size every time.

You can also make small image adjustments to your patient photos, if needed. Click the **Image Adjustments** button on the toolbar, make the desired adjustments, and click **OK** when finished. If you don't like the changes, you can click **Undo** on the toolbar or press Ctrl+Z.

Over time you may end up with hundreds and thousands of patient images stored in your Dentrix database. Depending on your camera, camera settings, and other factors, these image files could be extremely large. Every time you back up or restore your Dentrix database, you will probably want to back up your patient picture files also, and that usually takes place over a network connection. For these reasons, it's best to keep your patient picture file sizes as small as possible without sacrificing much image quality. Using MS Paint or some other image editing tool, you can resize your image to be about 30-50 percent of the original image size, which will produce a much smaller file size. (Cropping your image will also reduce its file size.) Taking time up front to reduce picture file size and define a standard process for your office can make a huge difference down the road when you're backing up a few thousand pictures every night.

These are a few ideas to get you started using patient pictures in your office. Once you start and see the many benefits patient pictures provide, you'll wonder why you waited so long. **DM**

Can You Write Me an Excuse Letter for School?

The Quick Letters feature makes it easy to create customized excuse notes for patients to take back to school or work.

■ **Dayna Johnson** | Certified Dentrix Trainer

When I worked in a dental practice, we had a middle school across the street from our office, and students would walk over from school for their dental appointments. Since these kids were usually not with their parents, we would write them a note to take back to school so they could receive an excused absence. For a long time our office would photocopy the excuse notes and write the name and date of the appointment on the note. Then I got smart . . . I added a new Quick Letter so all we had to do was select the appointment, open Quick Letters, select the excuse note, and click Print. My team thought this was the coolest thing ever! I'll show you how to set this up in Dentrix.

From the Office Manager's Maintenance menu, point to **Practice Setup**, and then click **Preferences**. Click the **Paths** tab (Figure 1), and then click **Open Folder** next to **Letter Template Path**. This is the location where you need to save your new letter so the Quick Letters feature can find it. If you look through this list of letters, you will find a document called dtxlm99.doc. Double-click it to open it in Microsoft Word. This document contains all the merge fields that are available to create a new letter.

Now let's create your letter. Since you already have Microsoft Word open, from the **File** menu, click **New**, and then double-click **New Document** to open a blank page where you will type your letter. Your excuse note doesn't have to be long; it can be as short and simple as this:

Please excuse «FName» «LName» from school/work. «FName» had a scheduled dental appointment on «Appt_Date» with Amazing Smiles Dental. If you have any further questions, please don't hesitate to call.
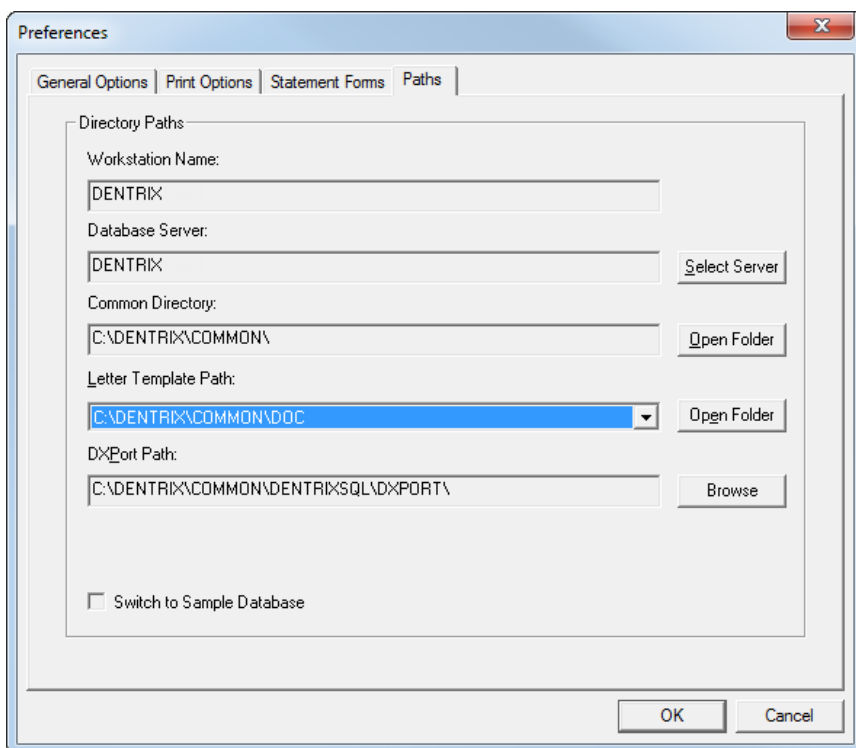
Figure 1 The **Paths** tab shows where your letter templates are saved.
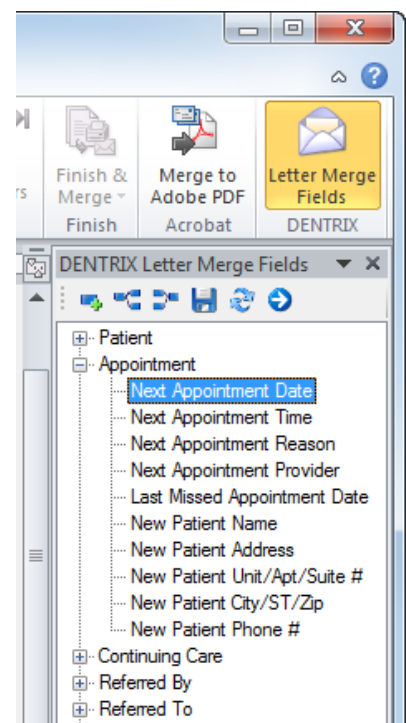
Figure 2 Insert merge codes from the Dentrix letter merge fields toolbar.

Figure 3 Specify a letter name and template for your Quick Letter.

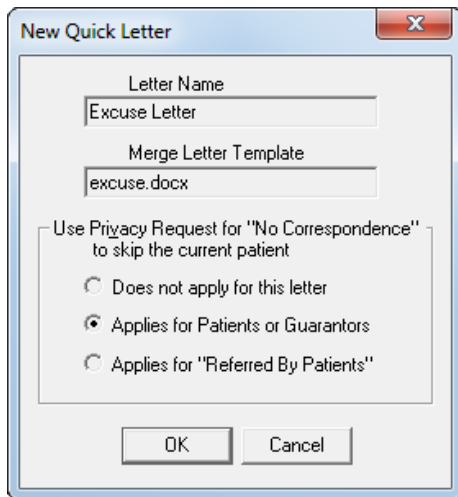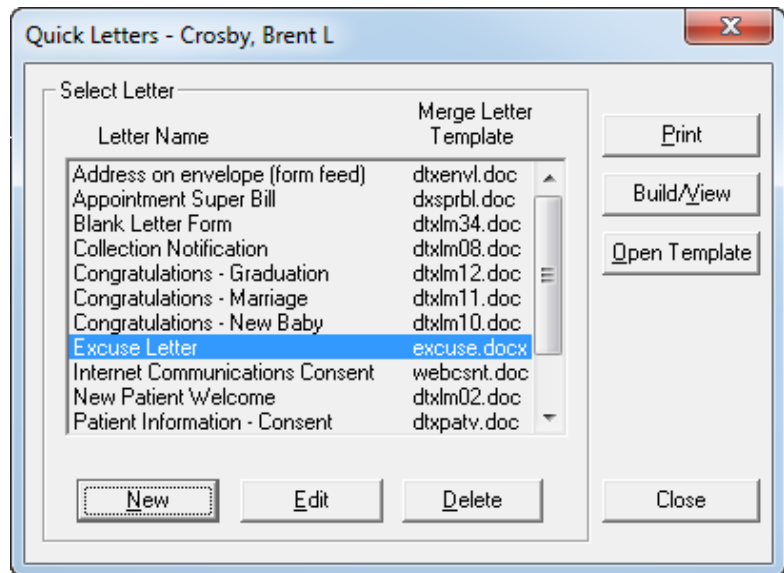**Figure 4** Select the name of your Quick Letter here.

To insert the merge codes, such as «FName» and «LName», you can copy and paste them from the dtxlm99.doc letter that you opened. But if you're using Microsoft Word 2007 or later, there's another, perhaps easier way. In Microsoft Word, click the **Mailings** tab. From the ribbon toolbar, click the **Letter Merge Fields** button. The Dentrix **Letter Merge Fields** task pane appears. From the Letter Merge Fields list, expand a category, such as **Patient** or **Appointment**. A list of letter merge fields appears (Figure 2).

Select a letter merge field from the Letter Merge Fields toolbar, and click **Insert Field**.

There are two different appointment dates you can use: **Next Appointment Date** (under **Appointment**) pulls today's appointment date if it has not been set complete; **Last Visit Date** (under **Patient**) pulls today's appointment date if it has been set complete. You need to select the correct merge field depending on whether you print excuse notes before or after appointments are set complete.

When you are ready to save your letter, make sure you save it in the Letter Template Path you noted earlier. Because the letter name cannot have more than seven characters, you may want to name it "excuse". Look at the **Save as type** field and make a mental

note of whether you are saving the file using a .doc or .docx file format.

From one of the Dentrix modules where you have a patient selected, click **Quick Letters** on the toolbar to open the **Quick Letters** dialog box. Click **New**. In the **Letter Name** field, type a description of this letter, such as "Excuse Letter". In the **Merge Letter Template** field, type the letter filename, such as "excuse.docx" (Figure 3). Make sure you specify a file extension for the correct file type you used when saving the template: either .doc or .docx. Click **OK**. With the Excuse Letter selected (Figure 4), click **Build/View** to make sure Quick Letters can find the letter and merge your patient data. You are now ready to use your template to create a quick excuse note for any patient. **DM**

I added a new Quick Letter so all we had to do was select the appointment, open Quick Letters, select the excuse note, and click Print. My team thought this was the coolest thing ever!

LEARN MORE

To learn more about Quick Letters , see the "Quick Letters overview" topic in the Dentrix Help. 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 20 years of 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.

Don't Miss Easy Opportunities to Increase Hygiene Production

Use the Scheduled Patients Summary to quickly find patients who are coming in today and need to schedule appointments for continuing care.

■ **Alicia Owens** | Dentrix Profitability Coach

Holding a morning huddle is the key to a productive and profitable practice. Practices that use the Dentrix Daily Huddle Report see a positive impact on patient retention, increased productivity, and fewer holes on the hygiene schedule.

One of the most useful pieces of the Daily Huddle Report is the Scheduled Patient List. You can use the Scheduled Patient List to identify patients who are coming in today who are overdue for their continuing care appointments (based on the due dates attached to the patient in the Family File) and do not have an appointment scheduled for that continuing care. One of the offices I work with saw a 15 percent increase in their hygiene production because they used this report to find which of their patients coming in that day were overdue for continuing care and then talked to those patients about their overdue care and made a plan for getting them back on the schedule for those hygiene visits.

To include the information about patients who are overdue for continuing care on the Daily Huddle Report, open the **Daily Huddle Report** dialog box. Under **Select Report Sections & Related Options**, select **Scheduled Patient List**. This is the report that will provide you with detailed information regarding your scheduled patients. Then, click the **Scheduled Patient Setup** button to open the **Scheduled Patients Setup** dialog box.

Under **Select Report Sections & Order**, select **Patients who have overdue CONTINUING CARE with no future appointment**. By checking this box, the **Select Continuing Care Types** group box on the right becomes available. Here you can select the continuing care type(s) you want to view in the report, or check **All** to see all types.

Note: The information on the Scheduled Patients Summary is only as good as the continuing care information you are entering and tracking in Dentrix, so you need to make sure you're properly setting up and maintaining continuing care in Dentrix.

Finally, click **OK** to return to the **Daily Huddle Report** dialog box, and click **Preview** to generate the report based on your settings.

From the generated report, you can easily see those patients on today's schedule who are overdue for a continuing care appointment and don't have an appointment scheduled for that continuing care reason (Figure 1). When they come into the office today for their appointment, you can remind them of their needed treatment and work to get those appointments scheduled.

For example, during your daily huddle meeting with your staff, you could make a plan for each member of your staff based on the patient list. I imagine those meetings going something like this:

"Gina, as the hygienist, you need to talk to Mrs. Jones about the importance of staying on top of her prophy visits. Remind her of what her insurance plan will cover, and see if you can get her scheduled for her next cleaning while you have her in the chair."

"Carol, at the front desk when Mr. Smith checks out, double-check his insurance coverage. I'm pretty sure his benefits reset within the next couple of months, and that he has met his deductible. Try to get him back in for his overdue X-rays since there wouldn't be any out-of-pocket expense for him."

It's all about knowing how to use the information you see on the report, and making a plan to do so. After learning the importance of using the Daily Huddle Report to identify patients coming in for appointment who are overdue for continuing care, one office I work with saw a 20 percent increase in their number of patients who had regular hygiene appointments, while another office had a 17 percent increase in patients who were scheduling their next hygiene appointment in advance.

If you want to increase your hygiene production and have better pre-booking rates for hygiene appointments, start incorporating the Scheduled Patient List into your daily huddle meetings. **DM**

LEARN MORE

To learn more about the Scheduled Patients List and other information found on the Daily Huddle Report, view article #49699 in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.

Daily Huddle Report
Scheduled Patients List

Appointments for Wednesday, January 21, 2015				Page: 1 of 1
Patients who have overdue Continuing Care with No Future Appointment				
Appt Date/Time	Patient	Prov/Op	Chart#	Continuing Care Types:
01/21/15 1:10pm	Mary Brown (Ms. Brown)	DDS2/OP-4	BR0001	PANOREX
01/21/15 10:00am	Kendra Bernard	DDS3/OP-6	BE0003	BITEWINGS
01/21/15 10:00am	Lucia Alvarado (Lucy)	HYG1/OP-5	AL0004	PROPHY

Figure 1 The report lists the patients who are scheduled for appointments today and have overdue continuing care.

Is Your Team Ready for Your Success?

Add value to your Dentrix solution by empowering the people who use it.

Dentrix Mastery Tracks will make sure every member of your team is as prepared and capable as your technology—by giving you a fast and affordable way to test what they know about Dentrix and find out where they need improvement. It also directs them to the targeted training they need to enhance their skills and improve your practice.

To get started, visit Dentrix.com/Mastery

HENRY SCHEIN®

DENTRIX®
Mastery Tracks

Increasing Treatment Acceptance and Getting Paid

Get insight into how to present treatment to patients so they accept it and pay for it.

■ **Debra Engelhardt-Nash** | Consultant, Speaker, Team Developer
Co-Founder The Nash Institute for Dental Learning

Imagine the impact increasing your patient treatment acceptance rate by 10-15 percent would have on practice productivity. Now imagine getting paid for those services in an efficient manner! These components have significant influence on practice growth and are critical to ongoing practice success.

Determine How Well You're Doing

In order to track treatment acceptance increase, you must determine a baseline percentage. An important statistic to monitor is what percentage of treatment plans are currently being accepted. This means of all treatment presented, what did the patient *actually* commit to by making financial arrangements and scheduling the appointment?

As long as treatment plans are being entered into Dentrix, the administrative team can then compare the total treatment plan amounts to the total amount collected upon and appointed to get the treatment presented versus treatment accepted rate. The Case Acceptance section of the Practice Advisor Report provides you with all of these statistics, including the percentage of treatment presented versus treatment accepted.

If the Treatment Acceptance rate is below 75-80 percent, there is potential patient treatment that is not being appointed. Discovering where the treatment acceptance obstacles are and learning how to enhance treatment presentation skills will dramatically improve patient compliance to recommended treatment.

Set Up Office Protocols

The patient begins choosing the office the minute they contact the practice for an appointment. The patient is looking for a quality experience that indicates they are going to receive quality care. It is the responsibility of team members to help validate the patient in

making the right decision to choose the office for their care. Eighty percent of gaining treatment acceptance is the ability to connect with patients in a relationship-based experience. People buy from people they like and people who make them feel as though they matter.

You need to design your office protocols to be good for the patient and be good for the practice. If your office systems and patient service skills can accomplish both, you will realize more success.

The Initial Phone Call

It begins with the initial phone call. This should be a two-way conversation to learn the patient's expectations and discover how the practice may meet their needs as well as their wants. The call should also provide inspiring information about the practice, the doctor, and how well the patient will be treated in your care. Gathering data is secondary to making a warm and welcoming first impression.

Always ask permission before asking questions or providing information. "May I tell you a little bit more about our office?" or "So that I may schedule the proper appointment for you, may I ask you a few questions?" are excellent ways to initiate conversation. Use this time as an opportunity to discuss the level of care your office provides, how patients appreciate your approach to their treatment, and how they are cared for by doctor and team during their visit. Introducing your philosophy of care in an easily understandable way is the start of gaining better treatment acceptance.

The New Patient Examination

The new patient consultation and examination must be scheduled so appropriate time is provided to introduce the patient to treatment possibilities, excluding clinical procedures. It is

important to establish a consistent consultation and examination process. The appropriate atmosphere needs to be created to give the patient an opportunity to share their concerns, expectations, and questions and for the dental team to be able to talk about potential treatment possibilities.

One of the main objectives of the new patient examination is to give patients the opportunity to meet the doctor and the team so they feel comfortable and confident they have chosen the right office for their care and to give them the information they need that helps them make the right choices in treatment. This may be done in a consultation room or treatment area. The important factor is that conversation with the patient about who they are, who the practice is, and what the practice offers for care ensues prior to treatment being performed.

Presenting Treatment

Using visual aids is important when talking to patients about treatment recommendations. This means "patient friendly" visual aids—keep the graphic dental visuals away from patient view. The majority of the population is made up of visual learners, which means they have to see what you're referencing in order to understand. Photographs, intra-oral cameras, and other media improve patient communication. Showing patients before and after photographs of completed treatment (with smiling, full-faces pictures) helps them visualize the treatment for themselves.

The rest of the population are audio learners, which means they have to hear to understand. When you incorporate conversation and photographs or other visual aids into treatment discussion, your treatment acceptance rate is likely to improve.

Take time to talk to patients. Asking for a substantial dental investment on

their part deserves time and atten-tion. (And for some patients $500 is substantial.) Present the treatment as a solution to their problem or way to meet their expectations.

Avoid unnecessary details. Put the treatment plan in "patient-speak" and avoid a lot of dental terminol-ogy. If you have a treatment plan printed or on the monitor, use it as a reference. But speak to the patient, not the paper or the screen.

Always present the doctor's pre-ferred or ideal treatment option first. If you never tell the patient what your ideal treatment plan will be, they will never choose it. Once you present your treatment plan, give the patient an opportunity to respond. Be careful not to assume that silence is negative. Avoid giving them all the options at once. That may confuse the patient and they are likely to defer to the final option listed.

Listen with intent. There should be no interruptions when presenting treatment to patients. Body language is important. Sitting near the patient (not too close!) and leaning slightly forward signifies the conversation is important and the focus is on the patient. Avoid sitting too far away from, or with your back to, the patient, staring at the computer monitor, or studying models on an articulator. The focus should be totally on the patient.

Discussing Financial Information

When the patient asks "How much?" this signifies that they may be ready to proceed and prepared to work out the financial details. When they ask this question, provide their total treatment investment. If they want a breakdown by procedure, they will ask for it. Be prepared to discuss total treatment pay-ment. When we assume patients are re-luctant or have an issue paying fees, our confidence may falter. When that hap-pens, our competence falters as well. Be confident in your fees and comfortable with your established financial protocols.

Your financial arrangements should be friendly to the patients and also fiscally sound for the practice. They should be designed to achieve a minimum ninety-eight or ninety-nine collection percent-age. They should also be orchestrated to minimize the accounts receivable balance.

Establish the right atmosphere. Financial discussions should be done pri-vately, away from the clinical setting. The

> **Spend time learning how to talk to patients about ideal treatment. The patient will benefit from the outstanding care they receive and the practice will benefit from increased productivity.**

course of treatment should have already been discussed and agreed upon. The decision to accept treatment happens with the clinical team. The financial team is responsible for negotiating payment.

Introduce your financial protocols in a way that shows how they benefit the patient. Present your ideal outcome first. If that means having the balance paid in full with a courtesy, offer that option initially. This may be an opportu-nity to explain that many patients take care of this with outside healthcare financing, offered in your practice. Wait until you present other alternatives so the patient has time to consider this option before you move on to your next preferred option. This continues until the patient has chosen a payment arrangement that will work for them and for the practice.

If the patient is asking for payment arrangements that are not offered or unsound for the practice, ask them to tell you what they had in mind. If it is un-reasonable (small monthly payments on a large balance carried by the practice, for example), explain to the patient that the office can provide that service using outside financing, upon credit approval.

Sometimes a patient may say that they simply cannot afford the treat-ment, or don't think they would get credit approval for healthcare financ-ing. When that happens, thank the patient for their candor. Other financing options for these patients may be to pre-pay for their dentistry, or break down their payment per visit, not per procedure. Divide the total treatment plan fee by the estimated number of appointments. The patient would be required to bring in the same amount at each visit, regardless of the proce-dure being performed on that day.

Financial discussions are two-way conversations that requiring negotiation

skills that are supported by consistent financial protocols that have been established for your practice.

Presenting treatment to patients so they accept it and pay for it requires skills training. The more prepared the dental team is in helping patients understand and appreciate the dental care being offered, the more confident and competent the team will become. Spend time learning how to talk to patients about ideal treatment. The patient will benefit from the outstanding care they receive and the practice will benefit from increased productivity. **DM**

Debra Engelhardt-Nash has been in dentistry over 25 years. She is a trainer, author, presenter, and consultant who has presented workshops nationally and internationally. She was a contributing editor for Contemporary Esthetics and Restorative Practice and an editorial board member for Contemporary Assisting. Debra was also an instructor for the Central Piedmont Community College Dental Assisting Program and a guest instructor for Medical College of Georgia School of Dentistry. Debra is a founding member and former president of the National Academy of Dental Management Consultants. She is an active member of the American Dental Assistants Association and the American Academy of Dental Practice Administration. Debra has been listed in Dentistry Today as a leader in continuing dental education and dental consulting since 2005. She received the American Dental Assistants Association's highest honor, the Kay Moser Distinguished Service Award, in 2008, and she has been chosen as one of the Top 25 Women in Dentistry for 2014 by Dental Products Report. Debra was the 2015 recipient of the Gordon Christensen Lecturer Recognition award, which was presented during the 150th Chicago Midwinter Meeting.

Is Your Practice Secure?

Protecting the data in your practice requires teamwork, vigilance, and the latest security solutions. This article outlines the risks and offers solutions for protecting your data.

■ **Thomas Grover** | TechCentral Marketing Manager

Your practice and the data you store is an enticing target for cybercriminals. Recent research indicates that your practice's patient health information (PHI) can be 10 to 20 times more valuable on the black market than credit card numbers.[1] Last fall following a cyber-attack on a hospital group that resulted in millions of patient records being stolen, the FBI issued a flash alert warning that healthcare companies are being targeted by hackers.[2] Obviously, dental practices are targets too. It's important for you to take steps now to protect your patient data and the future of your practice.

Understand the Risks

Most dentists employ some form of security to protect their practice from a data breach or loss. However, the safeguards often provide only one or two types of defense, which doesn't protect against the variety of vulnerabilities facing your practice. Without a combination of proper security protections, you put your practice at risk in the following ways:

- Financial penalties: violating HIPAA regulations can result in penalties ranging from hundreds to tens of thousands of dollars.
- Patient loss: Harris Interactive conducted an online survey in August 2013 that showed 40 percent of participants would look for a new dentist if their personal information was stolen from their current dentist.[3]

It's clear that when you take ownership of securing your practice from security threats, you make a commitment to the protection of the PHI you manage, as well as the profitability and success of your business.

Implement Multiple Security Solutions

Integrating a combination of security solutions provides robust protection for your practice. Below is a list of recommended security solutions you should use.

#1 Keep Your Hardware and Operating Systems Up to Date. Using old or outdated hardware and operating systems in your practice exposes your data to cyberattacks. Last year, Microsoft stopped supporting Windows XP, and later this year it will stop supporting Windows Server 2003. This means that new patches, security fixes, and updates are either no longer available (for Windows XP) or will no longer be available after July 14, 2015 (for Windows Server 2003). Cyber attackers who find new vulnerabilities in these operating systems can exploit them because the new liabilities will not be fixed.

If you are still running Windows XP or Windows Server 2003 in your practice, you need to upgrade.

#2 Enable Data Backup. Make sure your data backup solution will encrypt the data, store the data both locally and off-site, restore the data, and perform regular tests to ensure that everything is functioning properly. Employing regular data backup can protect critical business applications by:

- Minimizing down time: Allows you to quickly resume productivity if something goes wrong.
- Creating a more efficient practice: Saves you time and hard drive space with smart incremental backup.
- Protecting against data loss: Performs partial data recovery (PDR) or disaster data recovery (DDR) after disaster.

#3 Employ Data Encryption. When it comes to disasters, the question isn't if, but when they will occur. One way to protect against a data breach is to employ full disk encryption. When data is encrypted, access is restricted unless you have an encryption key.

The article "Multi-layered Security: The Best Defense," published in the Winter 2014 issue of *Dentrix Magazine*, provides detailed information about the type of encryption that dental practices should use. You can read it online at: www.dentrix.com/training/dentrix-magazine

#4 Firewalls, Anti-virus, and Remote System Monitoring. The following solutions should also be part of your protected practice:

- Internet Firewall Security: Provides secure access to the practice network and data from across the Internet. Effective firewalls can block malicious web software and filter inappropriate web content.
- Anti-virus Software: Delivers real-time, continual protection for all of your computers.
- Remote System Monitoring: Detects and reports hardware and software status, performance issues, and vulnerabilities that could affect your practice.

Seek Advice on How to Protect Your Practice

If you need help protecting your practice, Henry Schein TechCentral can perform a security assessment to identify areas in your practice that can be strengthened. TechCentral's suite of solutions can help ensure that your practice remains protected and profitable. Later this year, TechCentral will be releasing a new cloud backup solution, as well as data encryption for new servers. Contact TechCentral at 877-483- 0382, or visit us on the web at www.HenryScheinTechCentral.com. **DM**

[1] www.healthlawoffices.com/medical-records-worth-credit-cards-hackers/; www.cnbc.com/id/101708255#
[2] www.reuters.com/article/2014/08/20/us-cybersecurity-healthcare-fbi-idUSKBN0GK24U20140820
[3] www.infolawgroup.com/2013/11/articles/information-security

SOLUTION SPOTLIGHT

ImageRamp and Dentrix:
Easily Scan to the Dentrix Document Center

■ **David Wilson** | CEO and Founder, DocuFi, Inc.

Learn how ImageRamp™ for Dentrix simplifies scan and file capture and integrates your records and notes with Dentrix.

I mageRamp, DocuFi's leading intelligent data capture solution, is now integrated with Dentrix G5 and is certified under the Dentrix Developer Program. Using ImageRamp, dental professionals can easily capture scanned documents into the Dentrix Document Center, where patient and office documents are easily accessed. ImageRamp is compatible with all TWAIN-compliant scanners and scan-supported copiers and printers. You can scan directly into ImageRamp or capture files from a watched scan folder on your computer. You can scan single- or double-sided, remove blank pages, and auto rotate pages for reduced staff intervention.

The main Index Data pane on the left lets you easily enter the information about the patient or related document while viewing the scanned document in the right window pane
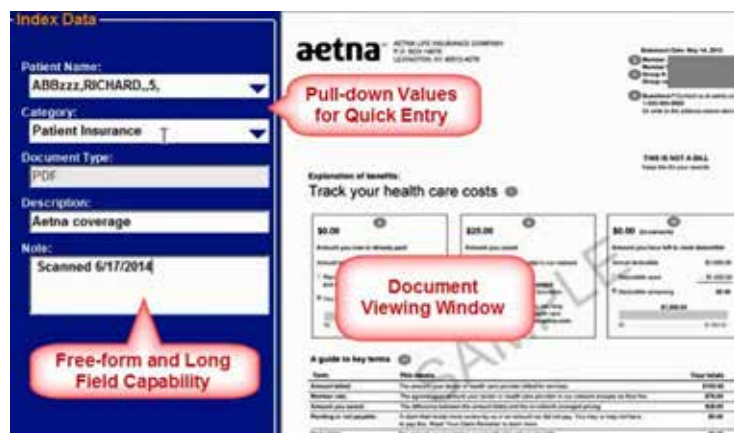
Figure 1 Indexing a document in ImageRamp is easy.

(Figure 1). When you scan documents, ImageRamp provides a list of patient names directly from the Dentrix database, making it easy for you to associate the scans with patients. A large Note field allows plenty of room for detailed notes about the document, if needed.

Once the document index information is entered, the document scan is automatically saved in the Dentrix Document Center. Documents are placed in the Document Center Category that you select (Figure 2).

ImageRamp simplifies patient record capture into Dentrix G5 in several ways:

- It captures them directly into Dentrix where they can be immediately assigned to a patient and indexed
- It allows you to easily select patient names from the pull-down Patient Name field for easy selection
- It does not require Dentrix to be running
- It uses barcode coversheets to scan and separate several patient charts and records
- It speeds data capture using drag-and-drop OCR indexing
- Its simple, intuitive interface makes it easy to capture several patient records at once

OCR For Fast, Accurate Data Capture

To simplify the processing of scans and files and free up valuable staff time, ImageRamp for Dentrix features Optical Character Recognition (OCR) scan capabilities. Using OCR technology also improves text accuracy with scanned documents since ImageRamp uses reliable, industry-standard OCR engines.

ImageRamp supports both drag-and-drop OCR and zonal OCR. With drag-and-drop OCR, users simply select the text in the document viewing pane and drag it over to the field they want to populate (Figure 3). Zonal OCR can

be especially helpful if you are scanning many of the same document forms. ImageRamp lets you create OCR zones where data is extracted from the scans only in the areas where your important information is found. This data can automatically populate the index fields. Furthermore, employing OCR on only a portion of the document speeds up scanning.

Image Clean Up and Enhancement

Basic clean and enhancement functions in ImageRamp (such as deskew, despeckle, auto rotate, remove blank pages, and remove lines) increase the accuracy and reliability of the information extracted from scans and ensure that you have the best possible image. ImageRamp goes beyond basic clean-up using "adaptive thresholding." Adaptive thresholding assists in cleaning "dirty" documents or documents that have a colored background that interferes with the foreground data (Figure 4).

Security Features

Need additional security to meet HIPAA requirements? With ImageRamp, you can elect to save files to PDF format and apply Digital Rights Management (DRM). ImageRamp's DRM implementation allows you to apply restrictions to PDF documents for printing, text extraction, and copy/paste actions and apply passwords and encryption to documents.

Additional Features

ImageRamp has many additional features that make integrating your scans and files into Dentrix easier. For example, barcode recognition offers the most trustworthy recognition technology for data capture. ImageRamp-extracted barcode data can be combined with other information from zonal OCR or system data for index purposes.

ImageRamp solves another common dental practice dilemma: it eliminates the need to rescan the same document for different patient files. Often used to process EOB's or other records where the same document needs to be in multiple patient records, ImageRamp allows the operator to easily scan the EOB once, index the different patients' information via the onscreen keyboard, use drag-and-drop OCR or barcode reading methods, and then route to the appropriate patients' records with little to no intervention. With ImageRamp's additional capture, classification, and search-and-retrieval features, locating and viewing your documents in the Dentrix environment is simplified.

As health care costs continue to rise, DocuFi's ImageRamp for Dentrix lets you simplify your document and patient record workflow and free up time so you and your staff can focus on what's important to you: practicing dentistry. **DM**
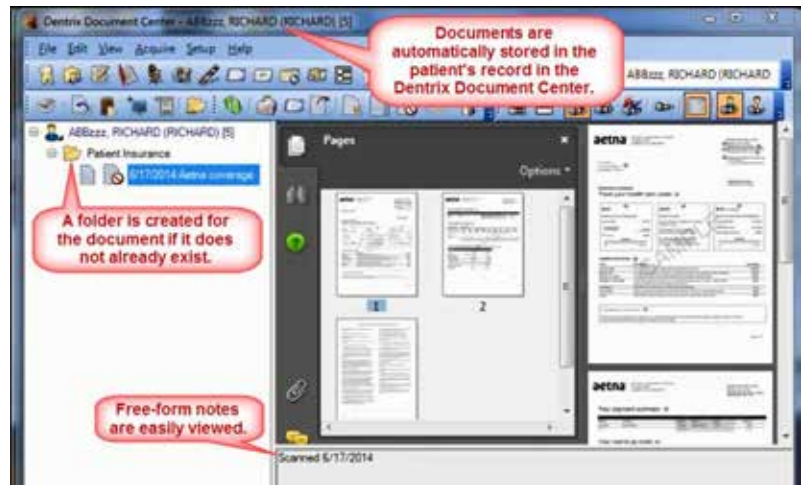
Figure 2 Documents are placed in the Document Center Category for the selected patient.
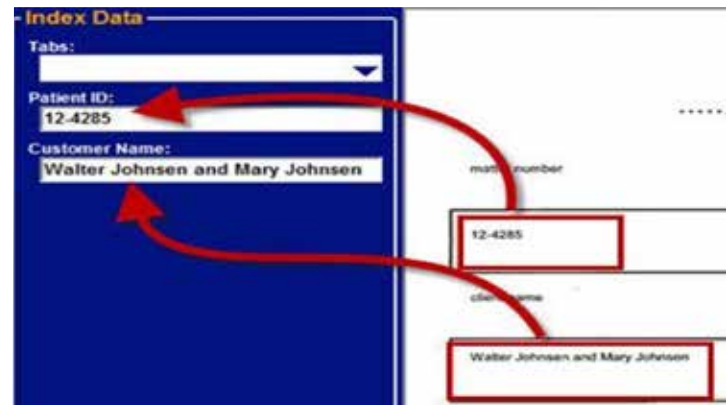
Figure 3 Drag-and-drop OCR lets you select text in the viewing pane and drag it into the appropriate field.

Figure 4 Adaptive thresholding image clean-up technology cleans "dirty" documents.

DENTRIX MarketPlace

DENTRIX G5 CONNECTED Solution Guide

You already depend on Dentrix to make your practice more profitable and productive. Now, you can turn Dentrix G5 into an even more powerful solution by adding trusted, fully integrated third-party applications and capabilities to your digital dental office. The Dentrix Connected logo means the product has been carefully developed, tested and certified to work with your Dentrix G5 platform. To see the full list of Dentrix G5 Connected applications visit **www.Dentrix.com/Integrated-products** today.

Apteryx
www.apteryx.com

APTERYX custom software

Dental Practice Solution
Apteryx exceeds the expectations of its customers by creating timely, innovative and cost effective software solutions that improve the profitability of the clients' businesses.

Broadview
www.broadviewnet.com

Broadview NETWORKS®

Network-based Business Communication
Make your practice more profitable with OfficeSuite Dental, the state-of-the-art phone system that fully integrates with Dentrix G5.

BiteBank Media
www.bitebankmedia.com

Bitebankmedia™

Dental Practice Solutions
Streamline your practice with custom dental websites, appointment notification and scheduling, real-time booking, patient education videos and reputation management.

Citi
www.healthcard.citicards.com

citi®

Citi Health Card
One click. One Solution. Patient financing just got a lot easier. The Citi Health Card program is now integrated within Dentrix G5. Spend more time on patient care and less money on your patient financing program costs.

Demandforce
www.demandforce.com

intuit Demandforce®

Patient Communication Solution
Demandforce works seamlessly with Dentrix G5 software to automate online and offline communications with existing patients to improve in-office efficiencies.

Dental Symphony
www.dentalsymphony.com

dentalsymphony™

Dental Practice Solution
Dental Symphony's web-based clinical software revolutionizes patient management. Working alongside Dentrix, Dental Symphony provides innovative tools to practice easier, safer and more efficiently.

DentalWriter
www.dentalwriter.com

Medical Billing Software

For over 25 years, Nierman Practice Management has led medical billing in dentistry by continuously developing innovative products and providing exceptional training for dentists looking to grow their practice.

DENTRIX G5 CONNECTED

DEXIS
www.dexis.com

Digital Diagnostic Imaging

DEXIS delivers innovative, high-quality digital imaging solutions to the dental community. With its state-of-the art sensor and easy-to-use imaging software, Dexis provides numerous benefits to you, your practice, and your patients.

DENTRIX G5 CONNECTED

eDossea
www.edossea.com

Intra-Office Communication

We are solely focused on the dental profession and within the dental profession on the secure, easy and inexpensive transfer of your client's medical records from one office to another. This is all we do.

DENTRIX G5 CONNECTED

Great Minds
www.greatminds.com

Dental Practice Solution

Great Minds, Inc. provides easy-to-use applications that provide valued features and allow efficient and high-margin management of the office and practice.

DENTRIX G5 CONNECTED

Lighthouse
www.lh360.com

Patient Communication Solution

Lighthouse 360 is a comprehensive automated patient communications system designed exclusively for dentists. It uses email, two-way text messaging, automated phone calls, postcards and letters to reach your patients.

DENTRIX G5 CONNECTED

Panda Perio
www.pandaperio.com

Periodontal Practice Solution

The complete clinical digital record for Periodontal practices. Charting, comparison reporting, treatment planning, automated chart notes, and much more. Save hours of admin time and unify your front and back office.

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Patient Activator
www.patientactivator.com

Patient Communication Solution

Patient Activator, part of Los Angeles-based 1-800-DENTIST®, is the leading social media optimization and patient communications service dedicated to the dental profession.

DENTRIX G5 CONNECTED

Practice Mojo
www.practicemojo.com

Patient Communication Solution

PracticeMojo creates proven campaigns that help dental practices recruit, retain and reactivate patients automatically, using email, text messages, automated phone calls and mailed postcards.

DENTRIX G5 CONNECTED

Practice Safeguard
www.practicesafeguard.com

Web-Based Fraud Monitoring

A web-based financial monitoring tool for Dentrix G5 users that deters fraud and costly errors by alerting any device you carry to unusual transactions in real time.

DENTRIX G5 CONNECTED

RecordLinc
www.recordlinc.com

Patient Communication Solution
RecordLinc is the largest professional network of dental professionals in the world. Securely and easily send electronic referrals, patient transfers, and track treatment plans between dental practices in a HIPAA-compliant portal.

DENTRIX G5 CONNECTED

Reputation
www.reputation.com

Patient Communication Solution
Reputation.com's platform enables dentists to see all their online reviews in one space and use the platform's analytical tools to understand the broad themes that emerge from patient feedback.

DENTRIX G5 CONNECTED

Sesame
www.sesamecommunications.com

Patient Communication Solution
Sesame Communications helps dental and orthodontic practices harness the power of the Internet to accelerate new patient acquisition, build patient loyalty and transform the patient experience.

DENTRIX G5 CONNECTED

Solutionreach
www.solutionreach.com

Patient Communication Solution
Smile Reminder provides patient engagement and communication solutions for healthcare practices. Utilizing the latest text, email, voice, video, web, and social media tools to communicate with customers.

DENTRIX G5 CONNECTED

TeleVox
www.televox.com

Patient Communication Solution
TeleVox Software is a high-tech engagement communications company, providing automated voice, email, text and web solutions that activate positive patient behaviors through the delivery of a human touch.

DENTRIX G5 CONNECTED

Text2Floss
www.text2floss.com

Patient Education
An interactive educational tool meant to help patients develop positive oral hygiene habits by delivering oral health information through the use of text messaging and mobile technology.

DENTRIX G5 CONNECTED

Transparent Aluminum
www.transparentaluminumllc.com

Dental Practice Solution
Transparent Aluminum is a company focused on creating custom workable solutions for practices to get the most out of their Dentrix database.

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U.S. Health Record
www.teamlinks.com

Intra-Office Communication
Teamlinks EHR was created to foster interdisciplinary collaboration on patient health information with the goal of connecting the health care team and the patient.

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Yapi
www.yapicentral.com

Dental Practice Solution
Started as the first fully integrated intra-office communication software, YAPI has grown into a comprehensive suite of innovative automation solutions designed around unique needs of dental practices.

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HENRY SCHEIN®

Dentrix Suites are support and eServices bundled together for a suite deal. As a Dentrix user with a customer service plan, you're already on your way with the Dentrix Essentials Suite. Now it's time to take your practice to the next level by upgrading to Momentum or Optimum. Dentrix Suites lower your costs and give you the practice management system you need to streamline workflow, build patient loyalty and boost your bottom line.

Dentrix.com/Suites

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Dentrix Momentum Suite

Dentrix Essentials Suite