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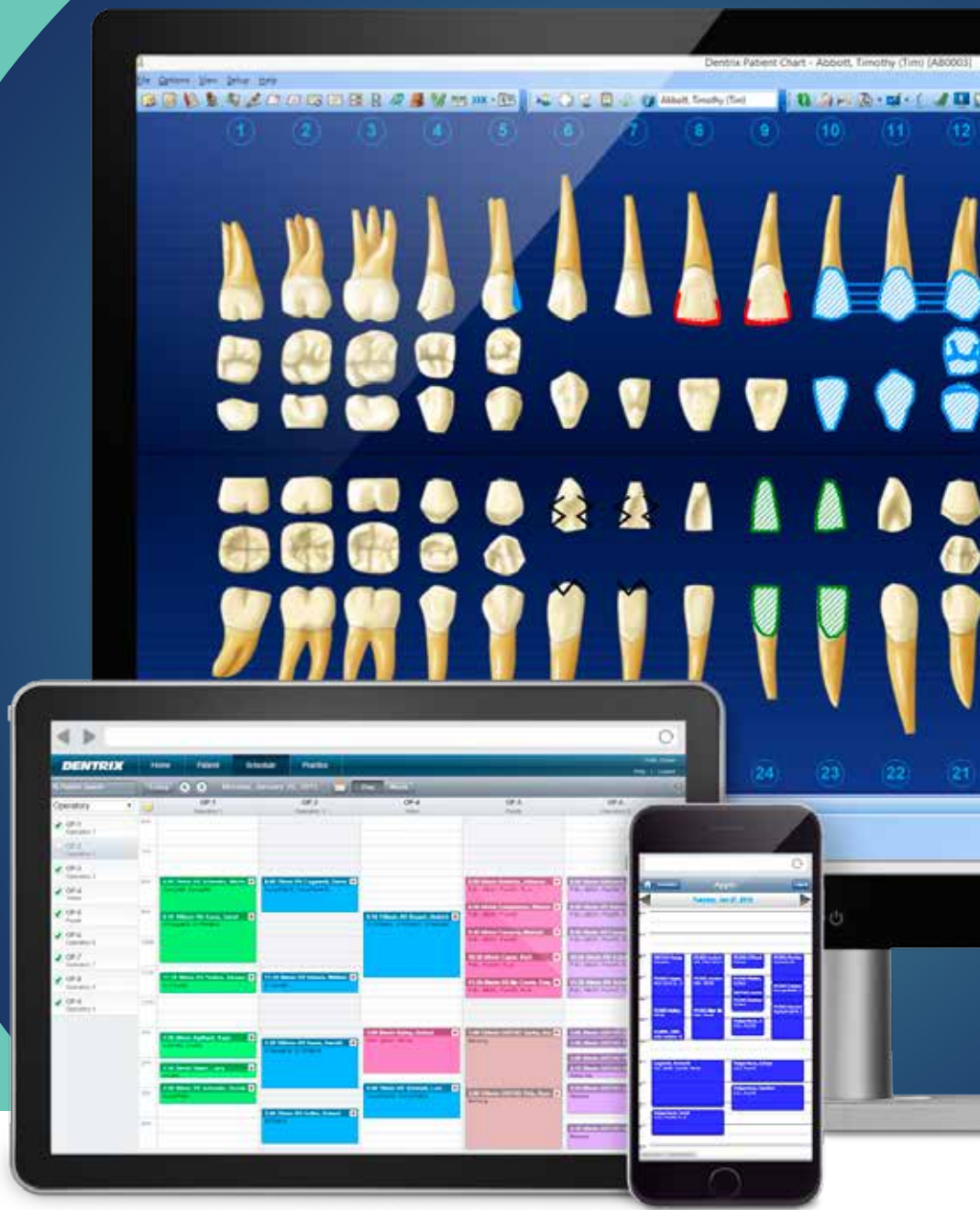
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Is Your Team Ready for Your Success?

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

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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.

How To Learn More

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

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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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Dentrix Mastery Tracks
SPOTLIGHT

Dentrix Mastery Tracks™ allows dental professionals to test how well they understand and can use Dentrix. Read on to find out about Ana Ebanks, an office coordinator who has completed all eight Mastery Tracks tests and earned all four specialist certificates.

ANA EBANKS | OFFICE COORDINATOR

Where do you work?
I work in an eco-friendly dental practice named Joseph F. Manzi, DDS in Eastchester, New York.

What is your title?
I am the office coordinator.

What are some of the duties you're responsible for in your practice?
I am responsible for greeting patients, scheduling new appointments, entering patient data, billing and insurance reimbursement, managing accounts payable and receivable, and treatment planning.

How long have you worked with Dentrix?
I have worked with Dentrix for two and a half years.

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

What got you interested in Dentrix Mastery Tracks?
I enjoy reading *The Dentrix Office Manager* blog by Dayna Johnson. In her October 16, 2014 blog post she mentioned Dentrix Mastery Tracks, and I immediately knew that I was interested in attaining the specialist title. What a great opportunity to be able to represent all that I have learned in Dentrix with a certificate!

How has participating in Mastery Tracks helped you use Dentrix?
While taking the various Mastery Tracks tests, I learned several easier and more efficient ways to complete some of the everyday tasks that I perform using Dentrix.

How has becoming a Dentrix specialist improved your career?
Becoming a Dentrix specialist has helped me to become more assertive in the workplace, and I have been given more opportunities to showcase my skills. Knowing that I have earned the specialist title (and the certificates to prove it) has given me that extra bit of confidence that is necessary to advance in my career.

What is your favorite Dentrix tip or trick?
Very frequently patients ask for an excuse note for work or school after dental visits. My favorite Dentrix tip is the ability to create a template for an excuse note that automatically generates the patient's name and date of their visit. This note can be stored as a Dentrix Quick Letter and can be acquired with just one click of a button. How convenient is that?

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.

▼ Announcing New Insurance Payor Connections

DENTRIX Attachments

The following payors now accept electronic claim attachments. With electronic attachments, you can add digital X-rays, EOBs, photos, and perio charts to the electronic claims you send.

Payor ID	Payor Name
39065	DentiCare of Alabama, Inc.
73288	Humana1
39065	UDC Dental California, Inc.
GP133	UHC MMA M Plus Children's Medicaid
39065	Union Security DentalCare of Georgia Inc.
39065	Union Security DentalCare of New Jersey
CX007	United Concordia- Sunlife
39065	United Dental Care of Arizona, Inc.
39065	United Dental Care of Colorado, Inc.
39065	United Dental Care of Michigan, Inc.
39065	United Dental Care of Missouri, Inc.
39065	United Dental Care of New Mexico, Inc.
39065	United Dental Care of Ohio, Inc.
39065	United Dental Care of Texas, Inc.
39065	United Dental Care of Utah, Inc.

For more information about electronic insurance claim attachments, visit www.dentrix.com/products/eservices/eclaims/attachments.

DENTRIX InsuranceManager

The Insurance Manager allows you to verify insurance eligibility in real time or to perform automatic insurance eligibility uploads. You can now verify patient insurance eligibility electronically with the following payors.

Payor ID	Payor Name
CDCA1	Delta Dental of California - TRICARE Retiree
02027	Delta Dental of Maine
02027	Delta Dental of New Hampshire
02027	Delta Dental of Vermont
02027	Northeast Delta Dental

For more information about automated insurance eligibility verification or to register, visit www.dentrix.com/products/eservices/ecentral/insurance-manager.

DENTRIX eClaims

Dentrix has eClaims connections with several new payors. For patients using the following insurance carriers, you can reduce paper claims by submitting electronic claims through Dentrix instead.

Payor ID	Payor Name
70106	Alliant Services a.k.a. Voluntary Benefits Plan & US Life Ins. Co.
INCS1	CareSource of IN (Just4Me)
13551	Emblem Health
CX021	Humana Specialty (KY)
37279	Insurance Administrators of America
SCION	Keystone First
90096	Land of Lincoln
GI813	Managed Dental Guard
27401	Michigan UFCW
PBGSM	Partners Benefit Group (Southborough, MA)
ILDTA	TruAssure

For more information about Dentrix eClaims, visit www.dentrix.com/products/eservices/eclaims.

DENTRIX eEOB

After you have sent claims and attachments to payors electronically, complete the electronic claim round trip by accepting electronic explanation of benefit statements (eEOBs) that the insurance carrier sends back to you. The following payors now send eEOBs.

Payor ID	Payor Name
37227	CNIC Health Solutions Inc.
CX087	Mutual of Omaha Commercial

For more information about eEOBs or to register, visit www.dentrix.com/products/eservices/eclaims/eeob.

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

Call 800-734-5561 for help setting up any of these services.

Are You Ready for ICD-10-CM?

Learn what the ICD-10-CM standard is and how it could affect your office starting this October.

In the late nineteenth century, French physician Jacques Bertillon introduced a classification standard for the medical community to track causes of death. Quickly adopted by many countries, it eventually morphed into the International Classification of Causes of Death. In the mid-twentieth century, the responsibility of managing and revising this code set was given to the World Health Organization (WHO). At that time, the volume expanded significantly and became known as the International Statistical Classification of Diseases, Injuries and Cause of Death (ICD).

While this standard code set is used in most countries, the United States, under the jurisdiction of the National Center for Health Statistics (NCHS), implemented a Clinical Modification (CM) version in the late 1970s using the 9th revision (ICD-9-CM). Even though the World Health Organization finalized its 10th revision of the ICD code set in 1992, the U.S. chose not to adopt them for tracking morbidity until the Department of Health and Human Services (HHS) proposed that a similar Clinical Modification version go into effect on October 1, 2013. The new standard was subsequently delayed twice, with the new implementation date now firm at October 1, 2015.

How Does This Affect You?

The looming deadline will have the greatest impact for those of you who send medical claims from Dentrix. Many medical payors are already prepared and will require the new codes on all claims after October 1. However, all customers should know that since the ICD-10-CM standard was originally proposed, the groundwork has been set for the dental community to process these codes as well.

With the changes in electronic submission standards to ANSI 5010 in 2012 along with the new ADA claim form from the same year (J430), there is now an ability to submit up to four diagnosis codes on a dental claim. In fact, there are approximately 36 dental payors as of this writing that are in the process of testing ICD-10-CM for situational purposes. Aside from this, we are not aware of any dental payors requiring diagnosis on all claims; however, there is a likelihood that these codes could be a requirement in the dental community in the future.

What is Dentrix Doing About This?

We are currently working on a future release of Dentrix that will allow for ICD-9-CM, ICD-10-CM, and SNODENT codes to be linked to an ADA code. In addition, the same medical cross-coding capabilities in previous Dentrix versions will continue to be available, but Dentrix will also allow you to map to both the ICD-9-CM and ICD-10-CM code sets.

As we continue to monitor the dental payor landscape, we will update our website (www.Dentrix.com) as we hear of additional payors testing or moving in the direction of diagnostic-driven billing. For those of you who are submitting medical claims today and would like to help us beta test this new functionality prior to the October deadline, please send your request and contact information to beta.dentrix@henryschein.com. **DM**

BRAD ROYER
Dentrix Product Manager

No Dose.

DEXIS CariVu is the no-dose solution* for detecting caries with 99% accuracy and displaying images in easy-to-read black & white. Patented transillumination technology allows you to see caries like never before and offers a new diagnostic tool for patients when x-rays are difficult or unwanted.

Lower Dose.

With the best image quality over a broader exposure range — and most importantly, at the lowest doses**— the DEXIS Platinum System delivers unparalleled radiographic images that are extremely clear, sharp and highly detailed. Patients benefit from the reduction in exposure.

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Tips & Tricks

DENTRIX ®

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.

Customizing the Procedure Code List in the Chart

Did you know you can customize which procedure codes appear in the procedure code list in the Patient Chart, and which you have to click **<<More Codes>>** in order to find? You can edit this list so that the most common procedure codes you use in your office are listed when you expand the procedure code category they are assigned to.

To customize the procedure code list:
1. From the Office Manager, click **Maintenance > Practice Setup > Procedure Code Setup**. The **Procedure Code Setup** dialog box appears.
2. Select the procedure code you want to add to the Procedure Code List in the Chart, and click **Edit**. The **Procedure Code Editor - Existing** dialog box appears.
3. In the **Treatment Flags** group box, check the **Show in Chart** option.
4. Click **Save** to save your changes, and **Yes** to verify the change.
5. Click **Close** to return to the **Procedure Code Setup** dialog box.
6. Repeat the process for any other procedure codes you want to add to the list.

Note: If you have the Patient Chart module open while you are making these changes, you will need to close the module and open it again for the procedures codes to appear in the list.

For more information on editing procedure codes, see the "Editing ADA-CDT dental codes" topic in the Dentrix Help.

Charting

Creating Appointment Book Day Notes

If you need a way to communicate date-specific information to your office staff, consider using the Appointment Book Day Note. These notes of up to 3,900 characters can be used as daily task lists, reminders, or notices. Using the Appointment Book navigation buttons, you can enter notes for not only the current date, but future dates as well. Any note you write can be accessed from any networked computer, so you can share notes with your entire office staff.

To create an Appointment Book Day Note:
1. Click the **Note** button located in the upper-left corner of the Appointment Book, next to the **Calendar** button. The **Appointment Book Day Note** dialog box appears.
2. Type your note in the text field.
3. To perform a spell check of the note, click the **Spell Check** button.
4. Click **OK** to save the note. The **Note** button will appear in yellow, indicating that there is a note for the current date shown in the Appointment Book.

Appointment Book Day Note - Monday - October 20, 2014

Dr. Johnson's birthday today!

Steve from the lab is out until Thursday, so contact Evan instead.

Pot-luck dinner party tonight at Janice's house, 6:30pm. Talk to her if you need directions.

Clear | OK | Cancel
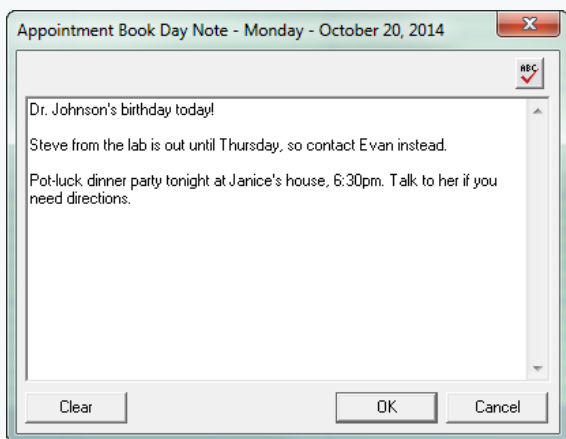
Creating Case Note Templates

It's important to keep detailed notes about each case in the Treatment Planner so you have a history of the patient's proposed, accepted, and rejected treatment. You can set up case note templates to use in common situations, like when treatment is accepted or when treatment is rejected because of cost concerns.

To set up case note templates:
1. From the Office Manager, click **Maintenance > Practice Setup > Custom Notes > Case Note Template Setup**. The **Case Note Template Setup** dialog box appears.
2. Enter the name of the template in the **Template Name** field.
3. Enter the text of the note in the **Template Text** field. If desired, click the spell check button to check the spelling of the note.
4. Click **Add** to add the template name and text you have just entered.
5. Click **Close**.

Once you have created templates, you can quickly access them by clicking the **Supporting Information** tab in the Treatment Planner. In the **Case Note** group box, use the **Templates** drop-down list to select the appropriate case note template, and click **Insert**. Then add any additional notes as needed and click **Save Note**.

Setting Print Preview Defaults

Did you know that you can customize the way the Print Preview displays reports in the Office Manager? Save your favorite report preview settings as the default so that reports automatically open the way you want when you preview them.

From the **Options** menu of the Dentrix Print Preview window, set the preferences for how you want to view the reports in the future from the following:
- **Save Defaults on Exit** - This option will save the Print Preview Settings as the default settings when you exit
- **View One Page** - Displays one page of the report
- **View Two Pages** - Displays two pages of the report
- **Zoom** - Lets you specify a display size (as a percentage of the full size page)
- **Default Page Size** - Displays the report preview using a default full-page view
- **Full Page Size** - Displays the report at full page width.

It's a good idea to take a look at each of these options to see how they actually display on your computer. Most reports when viewed at the One Page or Two Pages sizes are difficult to read without having to zoom in to see the information, although you can see how the information flows from page to page. If your primary reason for previewing a report is to get a glimpse at the information found on the report, you may want to pick an appropriate zoom level where you can read the report information and then use the **Save Defaults on Exit** option to save that zoom level for viewing future reports.

Attaching a Document to Multiple Patients

With the Dentrix Document Center you have the ability to scan, capture, and import documents such as patient letters, EOBs (explanation of benefits), referral letters, and images (such as patient pictures and X-rays). You can attach these documents to patients, providers, insurance carriers, and referral sources. There are times when you will want the same document to be attached to an entire family or to multiple patients. Instead of scanning the document multiple times in each patient's Document Center, you can attach multiple patients to the same document.

To attach another patient to a document:

1. Open the Document Center and select the patient who has a document that should be attached to another patient.
2. Right-click on the document you want to attach to another source and select **Modify Document Attachments**. The **Modify Document Attachments** dialog box appears.
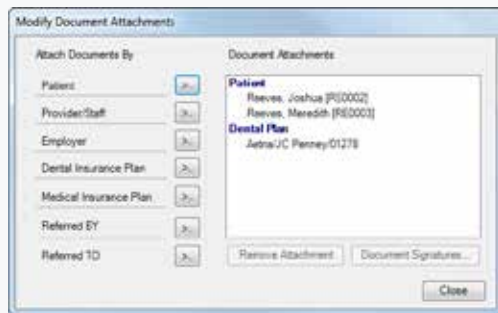
3. Click the **Patient** search button and select the other patient(s) you want to add to this document.
4. Click **OK**. The patient you attached will be listed in the Document Attachments list.

For additional information about using the Document Center, log in to the Dentrix Resource Center and view the webinar titled "Going Paperless with the Document Center" (article #46376).

Viewing Claim Statuses on the Insurance Claim Aging Report

You might think that unless you are looking at an individual patient's Ledger there's no way of knowing whether an insurance claim has been paid or if there is something that is causing a hold up. But if you're entering claim statuses in your claims as you get new information about them, you can run the Insurance Aging Report and see all of those statuses at once for all of your outstanding claims.

When you set the options for printing the Insurance Claim Aging Report, check **Print Status Notes** to print the status notes for claims. That way when you are using the report to review claims that are still outstanding, you have all the information you need in one place.
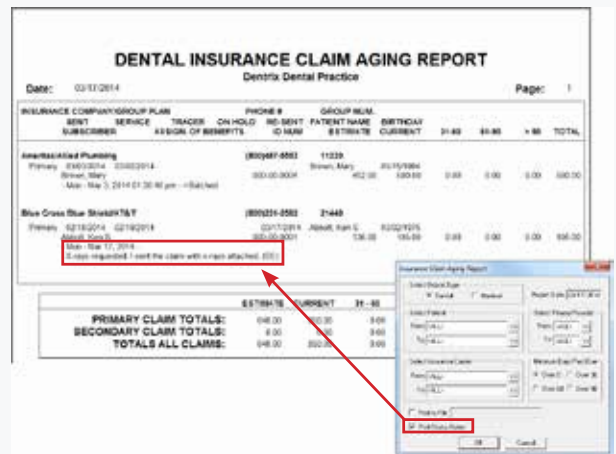
Customizing Continuing Care Intervals

When you use the continuing care system in Dentrix, each patient is attached to his or her own continuing care type(s). These continuing care types are set up with defaults (like six months between prophy visits), but Dentrix allows you to adjust the interval for each continuing care type on a patient-by-patient basis.

When you adjust the intervals for individual patients, every patient can be set up on exactly the interval they need and their continuing care due dates will reflect their own intervals instead of the standard intervals used for the rest of the practice.

To change a continuing care interval for a patient:

1. With a patient selected in the Chart, click the **Continuing Care** button. The **Continuing Care** dialog box appears with the patient's name included in the title bar.
2. Double-click the continuing care type to be changed. The **Edit Continuing Care** dialog box appears.

3. To set the interval for the patient's continuing care, click the search button next to the **Due Date** field. The **Set Interval** dialog box appears.
4. Change the interval to reflect the amount of time that should elapse between the patient's continuing care visits. If you want the interval to extend an extra day to prevent insurance billing problems, select **+1 Day**, and click **OK**.

*Note: When you change the interval, the patient's continuing care due date is automatically updated to reflect the new interval period. You can manually reset the date by typing the date in the **New Due Date** field after you set the interval.*

Introducing

DENTRIX G6
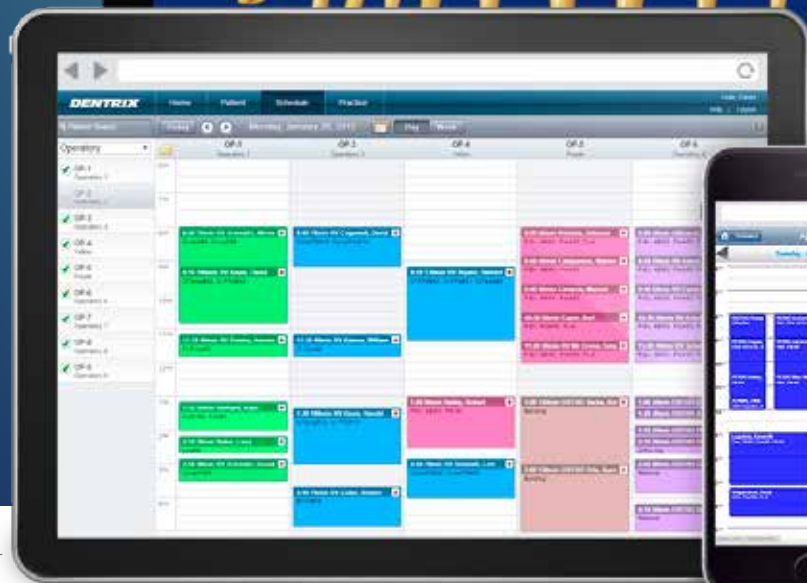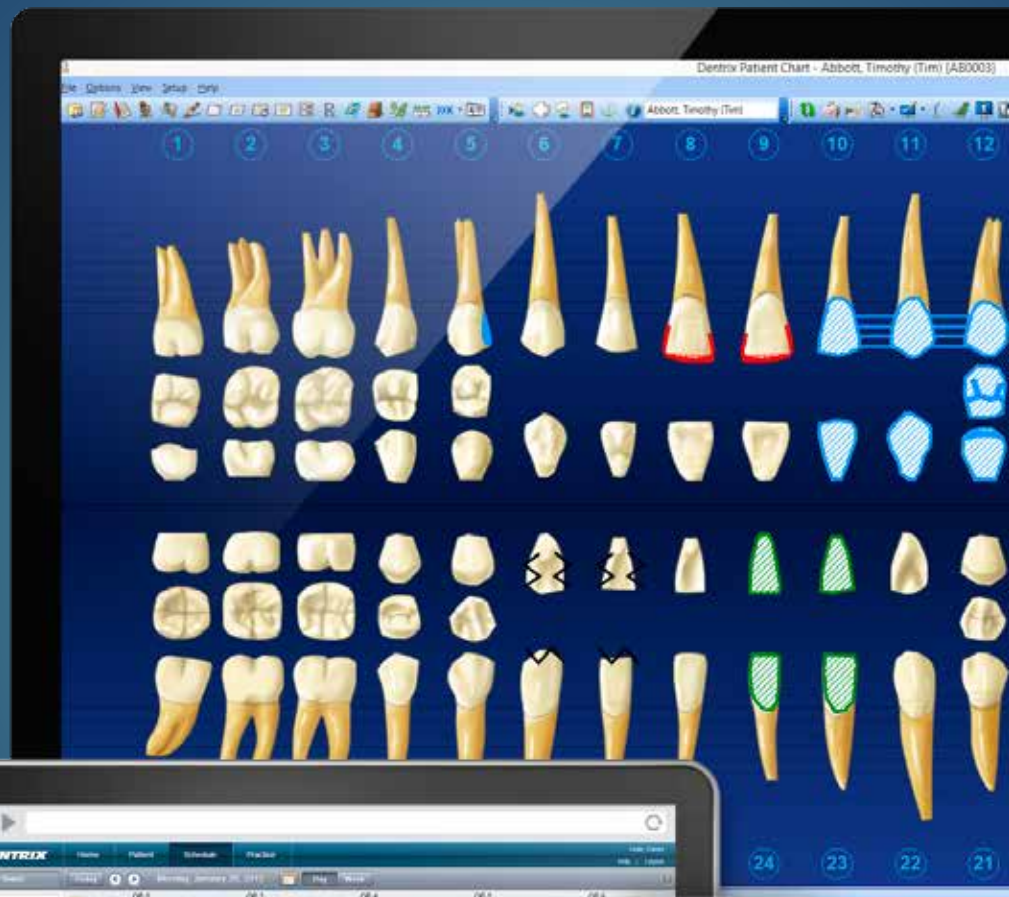
NATE NELSON
Product Marketing Manager

Learn what's new, what users are saying, and how to upgrade.

A t Henry Schein, we constantly evaluate our products and services to ensure we provide solutions that improve your practice and make your job easier. One of our fundamental principles is listening to our customers so we know and understand what dentists and their staff need to streamline workflow and create a successful practice.

Dentrix G6 demonstrates our continued commitment to listen to our customers. We gathered customer feedback via our online suggestion box, social media polls, and industry conferences. Many of you will probably recognize new features and enhancements in Dentrix G6 as improvements you requested. With Dentrix G6, we are pleased to again offer you exceptional new tools, features, and functionality you asked for.

What's New in Dentrix G6?

For more than two decades, Dentrix has been the leader in practice management software. Based on your feedback, we continue to release new tools, such as profitability coaching and the Practice Advisor, that make it easier for you to improve practice profitability. Dentrix also now gives you the option to bundle electronic services such as patient reminders, electronic claims, and attachments with a customer service plan in order to save you money. With Dentrix G6, we continue the legacy of helping you succeed by offering the following new features and enhancements.

Figure 1 The Dentrix Ledger includes several new columns.

Figure 2 You can now split payments by family members.

Ledger Enhancements

Dentrix G6 provides more ways for you to customize the Ledger to meet the needs of your practice. You can now select which columns to show and hide. You can sort the Ledger simply by clicking on the column header and resizing each column as needed. We have also added several new columns: Surface, Check #, Has Note (N), Has Referral by (R), Has Diagnosis (D), and Has Medical Cross Coding (M) to provide you and your staff with more detail for each procedure (Figure 1). Insurance estimates now appear in red at the bottom of the Ledger until a claim is created.

Split Payment by Family Member

The number one requested item on the Dentrix enhancement request forum, MyVoice.Dentrix.com, was to split payment by family member. Now you can automatically allocate payments to those family members who have a balance. Payment allocation works similar to split payment by

provider. And where patients have seen multiple providers, it can also split payments between those providers. You can set up the new payment options as your default method so future payments will continue to be split the way you specify.

To split a payment by family member, with a patient selected in the Ledger, from the **Transaction** menu, click **Enter Payment** to display the **Enter Payment** dialog box (Figure 2). Set **Patient** to **Split By Family Members**, specify a **Split Method**, and then provide the additional payment information as needed.

Appointment Book Enhancements

Dentrix G6 users rave about the enhancements in the Dentrix G6 Appointment Book. According to office manager Rick Spearow at Summit Dental Group in Nebraska, these changes "speed up many of the tasks in the front office and simplify them." He continued, "The visual improvements, including highlighting, are very beneficial and have cut down on mistakes."

Appointment Book enhancements allow you to do the following:

- Include an additional provider on each appointment to improve patient care. Although the appointment will still show the color of the first provider, you can view the additional provider from the appointment block, the Hover window, the Appointment Book View Report, the Route Slip, and the Patient Visit Form.

- Use Set Complete to review all of the scheduled procedures and easily select the rendering provider for each procedure before posting to the Ledger, and clear procedures that you don't want to post (Figure 3).

- Schedule appointments according to treatment plan cases and visits more easily.

- Identify who created an appointment and the appointment creation date in the **Appointment Information** dialog box, the **Appointment History** dialog box, and the Hover window to improve staff management and data security.

- Add a new patient's mobile phone number and email address directly in the **Enter New Patient Information** dialog box to provide more contact information.

- Select from more patient and appointment details for Print Appointment Book View, including the additional
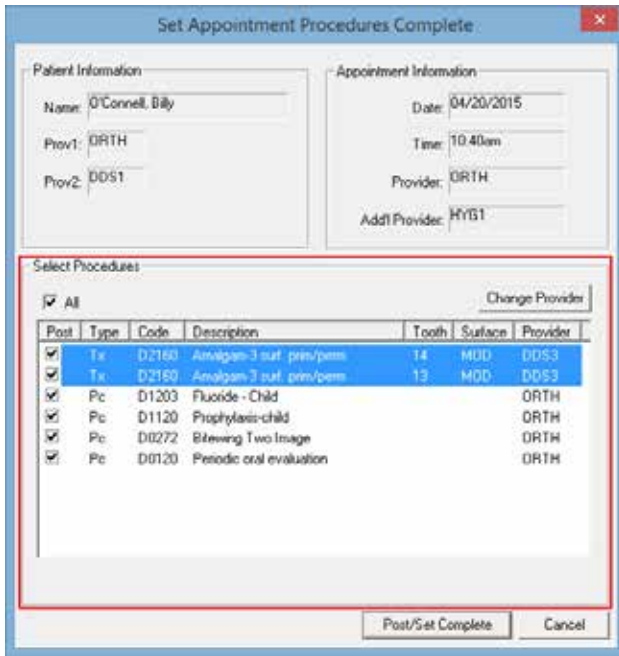
Figure 3 You can now specify the rendering provider for each procedure.

Figure 4 Automatically upload files directly to the Document Center with the new Auto File Acquire option.

provider, mobile phone, other phone, email, age, birthdate, primary insurance, guarantor name, appointment status, and continuing care attached.

Automatic File Acquisition with Any Document Scanner

If you are tired of being required to use a specific document scanner or having issues with your current scanner, it's time to update your software to Dentrix G6. With G6, you not only have the freedom to use any document scanner you choose, but you can now

automatically upload files directly to the Document Center, streamlining your workflow and reducing the number of clicks required to make scanned documents accessible to your staff in the software.

From the **Acquire** menu in the Document Center, click **Screen Capture**, and then click **Setup Defaults**. In the **Setup Acquisition Method Defaults** dialog box (Figure 4), under **Select Acquisition Method**, select **Auto File Acquire**. When finished, click **Save and Close**.

Contacts Database

Consolidate all of your contacts into one database that allows you to quickly search for and view information for patients and other non-patient contacts. To open the new eDex contacts database, click the new eDex icon that appears on the toolbar in most Dentrix modules (Figure 5). With a single

Figure 5 You can access eDex from most toolbars.

search by first or last name, address, email address, or phone number, you simply start typing, and eDex quickly narrows down search results to facilitate finding the contact you need. You can launch other Dentrix modules directly from eDex with patient information already selected for you. You can also filter the type of contacts you are looking for (Figure 6).

Figure 6 eDex lets you consolidate all of your contacts into one database.

Medical Alert Notes

Medical alerts are critical in helping provide quality care for patients. However, until now, medical alerts in Dentrix have been limited to short (one to three word) descriptions of the patient's condition. Dentrix G6 introduces medical

alert notes that allow you to expand on the information provided about each patient and identify critical care issues (Figure 7). In addition, you can date stamp the note to give you a frame of reference for each note and ask the patient about updates if required. Jayme Marks at Kaplan Dentistry in Cincinnati said, "Medical alert notes have been the most useful new feature in Dentrix G6 for our office because we are now able to have a medication list and medical alerts in one area. We really like this feature!"

To use the new medical alert notes feature, with a patient selected in the Family File, click the Medical Alert block. In the Medical Alerts dialog box, click Edit.

Letters and Custom Lists

A new List Manager lets you create custom lists of patients who need follow up, including patients with or without an email address, patients who referred new patients, and other customizable categories (Figure 8). You can work from the list within Dentrix and more easily generate letters and postcards for your patients.

Receiving the Update

At this point you may be wondering, "When will my office receive this update?" We have changed the way you upgrade to Dentrix G6. Customers who are currently subscribed to a Dentrix Customer Service Plan can go to www.Dentrix.com/G6 to request the update immediately and you will be given access to the update via the Dentrix Update Manager. The update process involves two steps: downloading the update and installing the update. Once the update appears in the Dentrix Update Manager, you can download it at any time—even after hours. Downloading the update ahead of time makes the update files available on your computer so that you're ready to install the update at your convenience.

If your office is not on a customer service plan, now is a great time to re-enroll by calling 1-800-DENTRIX. **DM**

LEARN MORE

To learn more about Dentrix G6, see the Dentrix G6 Release Guide available in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.
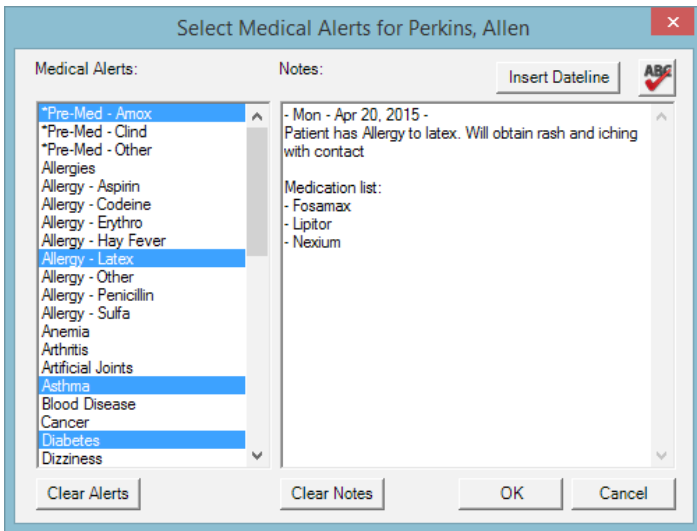
Figure 7 You can record and track more detailed medical alert notes for patients.
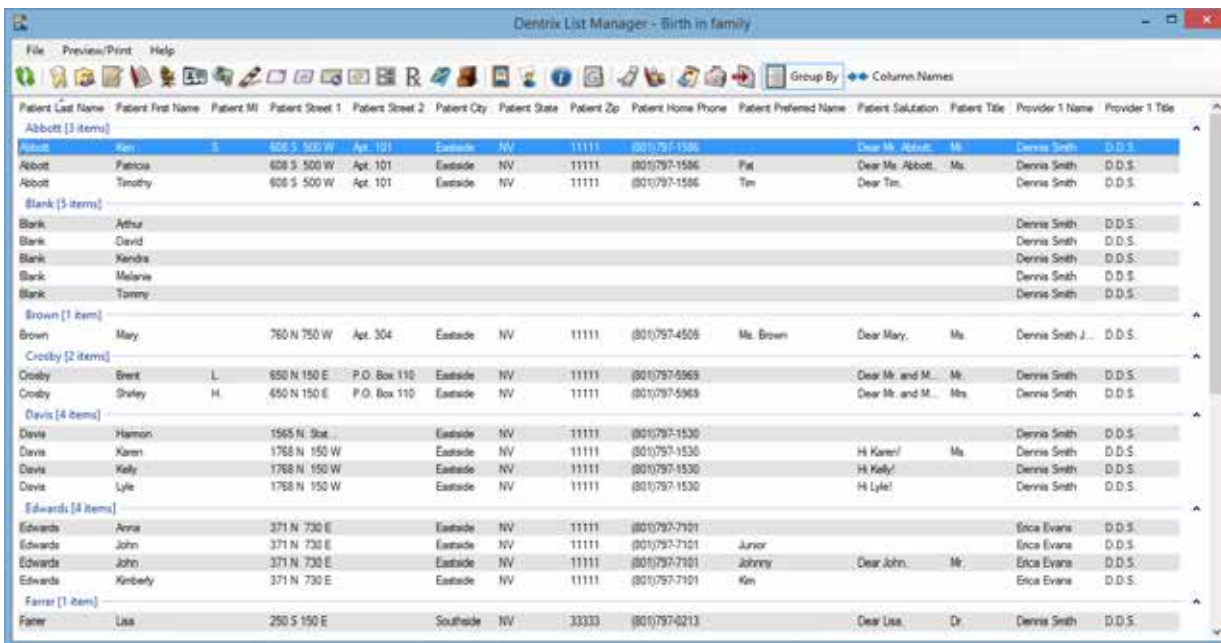
Figure 8 Create custom lists of patients with the new Dentrix List Manager.

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Profitability Coaching

Boost efficiencies

Business Management

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- Collect what you produce
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BOOST
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BRUCE HERBERT
Product Marketing Manager

Learn how to put the Internet to work for you to build a positive online presence and stand out from the competition.

The popularity of social media sites like Facebook, Google+, and Yelp has completely changed the face of word-of-mouth marketing. Each of these sites allows consumers to submit online reviews rating everything from their local auto repair shop to their dentist. Many people use these online review sites to read patient reviews of dentists before deciding whether they will visit a particular dentist. As a dentist, it's important that you know how to get reviews posted and maintain a positive reputation.

The new eCentral Patient Reviews feature can help you manage your dental practice's online reputation and help potential patients know about all the good things you are doing for your existing patients.

Improve Your Online Presence
Various surveys indicate that 72-88 percent of consumers trust online reviews as much as personal recommendations. Do you know what message your online reviews are saying to new and existing patients?

With Patient Reviews, you can automatically post positive reviews to your website and push them to popular social media sites, giving your prospective patients a reason to stop searching and schedule an appointment with your practice. Here's how it works:

- Patients receive an automated online survey after their appointment. They are given a chance to rate your practice using a 1-to-5 stars system and provide comments.

- Positive reviews (based on your preferences) can automatically post on your practice website, and a link helps patients easily post their positive reviews to your practice profile on social media sites like Facebook, Google+, and Yelp.

- Any negative reviews go directly to you so you can follow up on bad experiences and handle as you would like.

- You control which reviews appear on your website and communicate exactly what you want them to communicate.

Stand Above The Rest
When it comes to using the Internet to attract new patients and retain existing ones, many local dental practices (your competitors) may not be using it effectively or consistently as part of their marketing strategy. eCentral is designed to put the Internet to work for you so you can stand out above the competition. Using Patient Reviews, you can accomplish the following:

- Strengthen your online reputation by helping potential patients know what your current patients like about your practice.

- Attract new patients with positive reviews that immediately show up on sites like Google+.

- Reinforce your existing patients' trust and confidence with positive reviews from their fellow patients.

Setting Up Surveys and Reviews

If you have an eCentral account and want to start building a positive online reputation, log into eCentral at eCentral.ident.com. From the eCentral **Communications** menu, click **Surveys and Reviews**. Click **Setup** to display the **Setup** page (Figure 1). Make sure the **Enable survey emails** button is in the **On** position to enable surveys. Next, to **Send survey emails**, specify how many days after the appointment you want to send the survey request. After doing this, the other options on the page are enabled.

Under **Survey Header Message**, make any changes you want to the text that you want to appear at the top of the patient survey to introduce the survey to your patients. Use the other fields to specify the remaining survey setup information. When finished, click **Save and Continue**. Under **Question Setup**, select the questions you want to include in the patient survey. Click **Save**.

Managing Reviews

After patient reviews are submitted, set aside some time to read all patient reviews. Remember that this is valuable feedback that patients have taken time to provide to you. Make sure the positive reviews get posted to social media sites.

From the **Communications** menu, click **Survey and Reviews**. Click **Manage Reviews** to display the survey responses (Figure 2).

By default, the reviews are listed for the previous month, but you can change the date range using the **Date Range** boxes and then click **Search**. Click the Review link to read the review. You can then either post or remove survey reviews by selecting the check boxes next to the desired reviews and clicking either **Post** or **Remove** respectively.

With Patient Reviews, you can immediately get positive exposure and improve your online reputation, attract new patients, and build loyalty with existing ones. Patient Reviews will put the Internet to work for you to help you stay ahead of the competition. **DM**

LEARN MORE

To learn more about Patient Reviews or to request an online demo, visit www.Dentrix. com/eServices/Surveys or call 800-734-5561, option 2.

Figure 1 Use the eCentral Setup page to set up your survey review preferences.

Figure 2 Use the Manage Reviews page to view feedback and select which reviews get posted to social media sites.

For the Accountant in the Practice

Dentrix makes it easy to export basic accounting information for you to use in QuickBooks.

You already know that Dentrix can manage your patient information, chart your patient's clinical data, and provide you with a myriad reporting options. But did you know that Dentrix can go a step further and download basic accounting information (debits and credits for specified providers) directly into your QuickBooks software using the DXPort feature? Dentrix DXPort is compatible with QuickBooks 2012 or higher, so if you're using a recent version of QuickBooks, all you need to do is follow these simple steps.

In the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Preferences**. Click the **Paths** tab to check the DXPort path. This is the folder Dentrix uses to export the information, so make a note of it and then click **OK**.

To set up the export to QuickBooks, from the **Analysis** menu, click **DXPort Setup** to display the **DXPort Setup** dialog box (Figure 1). Make sure **Export To** is set to QuickBooks. Under **Select Provider**, select the range of providers to include or leave these fields set to <ALL>. Under **Select Entry Date**, specify the entry date range you want to include, and then click **Export Setup**. On the right side of the **Export Setup** dialog box (Figure 2), make sure the totals you want to export are selected: **Production Total, Collections Total**, and/or **Other Collections Total**. Then under **Adjustment Type Allocation** and **Payment Type Allocation**, select the types of allocations you want included in these totals. When finished, click **OK**, and then click **Save**.

After you have successfully exported your Dentrix data, you can import and open it up in QuickBooks. Open QuickBooks for the "Company" that the office uses. From the **File** menu, point to **Utilities**, and then click **Import**. Browse to the

DentrixAR.IIF file that was exported (in the folder location you jotted down earlier) and double-click it. Click **chart of accounts** to view the figures you just imported.

Using the DXPort feature in your Dentrix software can save you time and help you import more accurate figures for your accountant. **DM**

Figure 2 Specify what to export using the **Export Setup** dialog box.

LEARN MORE

To learn more about exporting Dentrix data, see the "DXPort overview" topic in the Dentrix Help or Article #22921 in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.

Dayna Johnson, founder and principal consultant of Rae Dental Management, helps dental offices improve patient care, increase collections, and reduce staff headaches by implementing efficient management systems. With 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.

DAYNA JOHNSON
Certified Dentrix Trainer

Figure 1 Set the export options in the **DXPort Setup** dialog box.

Make It Personal.

Build your success — one personal connection at a time.

Dentrix Communication Manager makes it easy to expand, strengthen and personalize all your patient interactions—with a patient communication solution that takes full advantage of the tools and technologies your patients depend on most.

With Communication Manager, automated text messages, email and even traditional postcards all work together to keep your patients totally informed and connected to your practice before, during and after their appointments.

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DENTRIX® Communication Manager

Tracking the Value of Social Media Marketing

Discover how to update the questions you ask on new patient referral forms to better track online referrals and improve your social media marketing strategy.

It used to be easy to track the value of practice marketing. Before websites came along, most practices only advertised through yellow page ads and the occasional postcard campaign. When new patients called to make an appointment, it was easy for them to remember exactly where they found you. At that time, patients often wouldn't have access to your phone number if it weren't for the phone book or postcard advertisement.

Today, we have a variety of social media and online marketing tools at our disposal. Along with those tools comes an array of online locations where patients may have discovered your practice. In fact, research suggests that new patients will rarely visit your website and call you directly. According to Google's commissioned study, *Zero Moment of Truth*, in most cases consumers are more likely to first visit a website, seek online reviews, watch video, and check social networks before making new product or service buying decisions.[1]

In turn, today's new patient online journey makes tracking more complicated. One of the most common concerns I hear from dentists and office managers is their frustration in tracking the source of new patients—not only related to social media, but all marketing sources. The good news is that you have the ability to track where new patients have seen you online with the customization of your Dentrix intake forms.

Many practices already track new patient referrals by asking, "Whom may we thank for referring you?" However, that question alone is as outdated as marketing with yellow page ads. Instead, consider the following intake form questions:

How did you find us?

☐ Referred by a friend: _____

☐ Found you online _____

In addition to the questions above, specialty practices should also add the following question:

☐ Referred by my dentist: _____

Typically these questions are asked near the top of the first intake form. Beyond these "referred by" questions are the patient registration and health information questions. I suggest you also add the following question and options to the very bottom (last question) of your intake forms.

Have you seen us on:

☐ Facebook ☐ Twitter ☐ YouTube ☐ Google Reviews
☐ Television ☐ Local Magazine

Include check boxes next to the list of marketing options so patients can easily check the location(s) they have seen you online (and offline, in the case of television or local magazines).

The reason this additional marketing-related question is asked at the bottom of the intake forms after the registration and health information is to convey to the patient you are first and foremost concerned about them and their health. While this level of information gathering
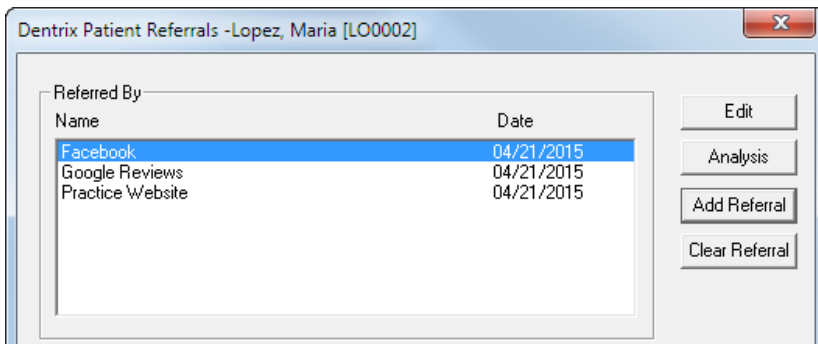
Figure 1 You can add multiple referral sources to one patient.

is new to many practices, those using this format to track are finding most patients are consistently answering the marketing questions.

An alternative to intake form tracking is simply asking patients where exactly they found you online. While this interview method is fine, it isn't always as consistent as the Dentrix intake form process that automatically collects the information for you. The added benefit of asking patients whether they've seen you on Facebook, Twitter, YouTube, etc. is that you are also informing patients you have a presence on those social media sites—increasing the possibility they may follow or like you there.

When patients fill out their forms, make sure you are entering ALL of the online (and offline) sources they listed in their referrals in the Family File. For example, if Maria Lopez fills out her intake forms and marks that she heard about your office on

Facebook, Google reviews, and your practice website, open Maria's Family File record, double-click the Referred By block, click Add Referral, and add all three of those referrals individually (Figure 1). That way you'll be able to track the effectiveness of each of those referral sources.

Whether your practice is already established on social media or just getting started, it's important to track the results of your efforts. Add these specific questions to your intake forms and you can begin to collect data to support (or question) your social media efforts. Over time, if you are actively marketing on Facebook, you should notice a portion of your new patient population reporting they've seen your practice there. If not, you may need to reconsider your social media strategy.

To analyze the effectiveness of your social media efforts in Dentrix, from the Office Manager click Maintenance > Reference > Referral Maintenance. Select one of your social media sources in the Referred By list and click Analysis. The Referral Analysis dialog box will open, which will show you the total number of referrals from this source, the names of patients who marked this as a referral source, and the production generated from this referral (Figure 2). You can use that data to determine the effectiveness of your social media campaigns.

Are you currently collecting this level of data through your Dentrix forms? If not, when will you commit to implement this level of tracking? There is a saying, "Knowledge is not power. Applying what you've learned is." Knowing exactly where your new patients are finding and researching you online will help you make smarter marketing decisions. **DM**
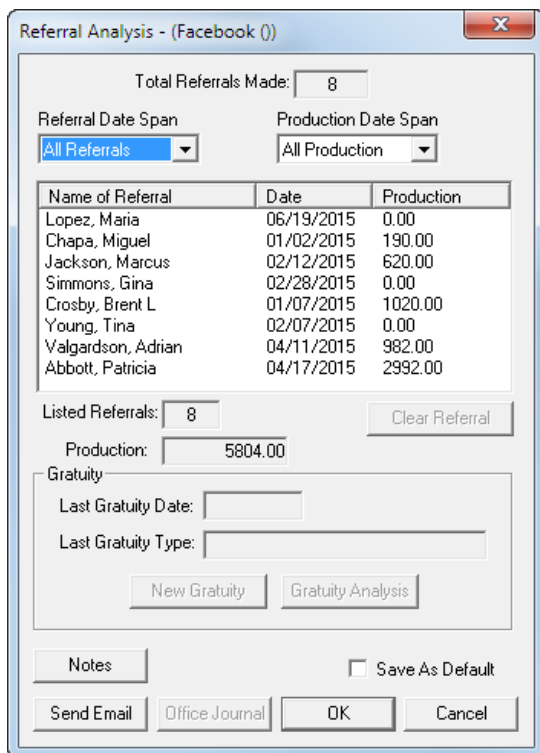
Figure 2 The Referral Analysis allows you track the effectiveness of your referrals.

Rita Zamora is an international speaker and published author on social media marketing and online reputation management. She and her team offer experienced social media training, mentoring, and support. Their healthcare professional and corporate clients are located across the globe. Rita graduated magna cum laude from the University of Colorado with a bachelor's degree in business and marketing and has over 20 years experience working in the business of dentistry

[1] https://www.thinkwithgoogle.com/collections/zero-moment-truth.html

RITA ZAMORA
Social Media Consultant

It May Be Time to Upgrade Your Server

With support for Windows Server 2003 expiring in July this year, many offices are looking to upgrade their server software and hardware. Learn the benefits of upgrading now.

Few things are more important to you than protecting your practice. And with sensitive information such as financial records and Patient Health Information (PHI) stored on your server, you need to take the proper safeguards to make sure your server is secure and up to date.

Come July 14, 2015, Microsoft will no longer support Windows Server 2003. So for some offices, it may be time for an upgrade. If you're currently running Windows Server 2003, continuing to do so could put your practice at risk because Microsoft will stop releasing updates for your network.

In fact, the risk is so serious that the United States Computer Emergency Readiness Team (US-CERT) released a public warning about it last November.[1] According to the warning, there were 12 million physical servers worldwide still running Windows Server 2003 in July 2014. The alert also issued the reminder that "all software products have a lifecycle" and that when Microsoft support ends in July of this year, anyone still using Windows Server 2003 will be at an elevated risk for cyber dangers. To put this in perspective, Computerworld reported that there were 37 critical updates for Windows Server 2003/R2 in 2013 alone.[2] Once support ends this July, those types of critical issues will go unfixed and unprotected, making your practice vulnerable to cyberattacks or electronic data loss. And that's not all. Continuing to run the old server will also lead to software and hardware compatibility issues in the future.

Microsoft's web page covering the end-of-life of Windows Server 2003[3] literally has a clock counting down the days, hours, minutes, and even seconds until support ends for the server. With the headline "Migration is worth it!" Microsoft has made their message clear that all good things must come to an end, and that moving on from Windows Server 2003 is not only a safety necessity, but a business modernization opportunity as well. In other words, there's no time like the present to evaluate your server needs and make a change.

Why Switch?
The benefits of upgrading your server far outweigh any hassle or fear in doing so. Not only will you avoid potential problems, but you'll be positioning your practice for the future. Some of the benefits of upgrading include the following:

- **Compliance.** Remaining compliant with industry standards is a no-brainer. Upgrading your server may help keep you up to date with industry-wide requirements. Non-compliance risks and costs could be dramatic for your practice.

- **Security.** When you consider that the Department of Homeland Security (US-CERT is within the department) is concerned about the risks of continuing to run Windows Server 2003, migrating to a new server seems a lot more like a necessity than an option. To put it simply, why risk it? Since Microsoft will no longer be updating Windows Server 2003, new server hardware and software would ensure that your system receives patches and updates that can make your server less vulnerable to cyberattacks or bugs.

- **Savings.** Using an out-of-date server can increase your operating costs due to increased maintenance costs, network segmentation (to isolate your 2003 servers), and stronger firewall protections. Early reports are estimating that businesses will be charged $600 per server per year to continue safely running Windows Server 2003 after support stops on July 14—and that price is likely to go up during the second year. David Mayer, practice director of Microsoft Solutions for Insight Enterprises, predicts it could even cost twice that much annually to continue to safely run the server.

- **Performance and Protection.** An upgrade also gives you RAID storage capability that delivers both high performance and redundancy in case of hard drive failure.

- **Growth.** Don't let your practice be left behind. A new server will position your business for the future by giving you the power, current technology, and expandability to grow.

How You Can Upgrade Your Server
Feeling overwhelmed? You don't need to. Henry Schein TechCentral experts are ready and available to help you. Our experts can help you evaluate your needs and recommend the right equipment to meet industry requirements. We'll look at the age of your current server, the amount of data on the server, and the method of copying or transferring the data. And the best news is that a hardware assessment by our experts is free. We will quickly deliver, install, and integrate your new server. The typical migration for dental practices should only take a day or two. In other words, your practice won't miss a beat.

Migrating to new server hardware has never been easier. Contact a Henry Schein TechCentral expert today at 877.483.0382 to schedule an evaluation of your existing server and hardware, or visit us on the web at www.HenryScheinTechCentral.com. **DM**

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[1] www.us-cert.gov/ncas/alerts/TA14-310A
[2] www.computerworld.com.au/article/560000/windows-server-2003-end-life-guide
[3] www.microsoft.com/en-us/server-cloud/products/windows-server-2003

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Jakari Care and Dentrix:
Automate the Collection, Analysis, and Secure Sharing of Patient Information

■ **Anatoly Bushler** | President & CEO, Jakari Care

Jakari Care makes it easy to enhance your patient experience and practice productivity while becoming a paperless office.

Offering your patients better care and more one-on-one time often requires using advanced technology in your office. You've already invested in Dentrix, so you understand the value of using technology to collect and analyze important patient information. But there are additional ways that you can use technology to enhance your patient experience and practice productivity while becoming a paperless office.

Jakari Care offers a solution that enables you to realize even greater value from your Dentrix investment. Jakari Care makes it easy to automatically collect, analyze, and transfer patient health history, treatment goals, signed consent forms, and other important information into Dentrix. What's more, Jakari Care allows you to share this patient information with other dental specialists in a HIPAA-compliant manner instead of using email.
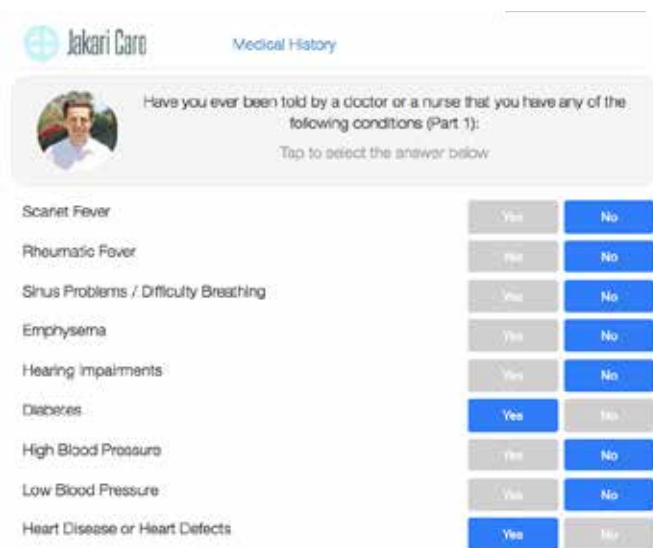

Figure 1 Your patients can complete an easy-to-use online questionnaire at home.

Figure 2 Patients who don't do their "homework" complete a tablet questionnaire in the waiting room.

Collecting Patient Information

In many dental practices today, a new patient calls to schedule an appointment and subsequently receives a "welcome packet" containing new patient forms to be filled out before the appointment. More often than not, the patient waits and ends up filling out these forms in the waiting room.

With Jakari Care, a new patient receives a text message or an email link to an easy-to-use online questionnaire (Figure 1), which includes the option to digitally sign any consent forms from a personal computer at home.

For the estimated 80 percent of new patients who don't do their "homework," Jakari Care also provides in-office tablets (included with your monthly subscription) that can be used to complete the questionnaires in the waiting room (Figure 2). Jakari Care's questionnaires include various practice disclosures and consent forms, a medical history, social history, family history, medications and allergies, contact information, and insurance information. In addition, Jakari Care questionnaires collect detailed information about the reason for the visit and any additional information that may help you better understand the patient's treatment goals.

Because Jakari Care is Dentrix-certified, once clinicians review and update patient-provided information, the Clinical Summaries are automatically transferred into Dentrix. The

Jakari/Dentrix Connector is easily installed on your Dentrix server or workstation and automatically uploads completed Clinical Summaries into the Dentrix Document Center for each specific patient.

Analyzing Patient Information

Jakari Care's system automatically analyzes patient responses to the questionnaires and generates a Clinical Summary highlighting areas of concern, including patients who have oral cancer risk factors, medical conditions, or medical allergies. It also provides treatment suggestions, such as a mouth guard for patients who engage in contact sports, implants for patients with missing teeth, or a referral to a sleep specialist for patients with a possible sleep disorder. You can then review this Clinical Summary with the patient using Jakari Care tablets or the Jakari Care web portal (Figure 3).

According to data collected by the ADA, incomplete or out-of-date health history is the second most common record-

Figure 3 Jakari Clinical Summary automatically highlights areas of concern and treatment opportunities.

keeping error that plays a part in malpractice proceedings. As such, the ADA recommends updating health history at every patient visit. However, without an automated system like Jakari Care, continually updating complete health history can be a time-consuming and expensive process.

Jakari Care enables your practice to automatically send out short, pre-visit questionnaires that can be completed at home. Alternatively, patients can quickly update their health history, treatment goals, contact information, insurance, and other information in the office using tablets provided by Jakari Care.

The Jakari Care's simple, friendly questionnaire format allows you to gather additional valuable information from patients. By asking basic practice satisfaction questions after patients update their health history, Jakari Care helps you identify highly satisfied patients and offers these patients the opportunity to refer a friend to the practice right from your waiting room or operatory. This gives you the chance to collect a significant number of new patient referrals. In fact, our data suggests that 10-15 percent of patient appointments, including first-time and returning patients, leave referrals via Jakari Care, which is significantly higher than the estimated 5-7 percent industry average (based on our own research and analysis of the dental industry).
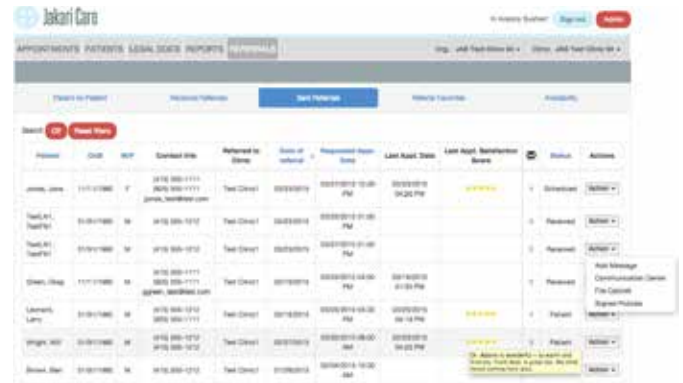

Figure 4 Jakari Referral Center helps you to securely share information and coordinate care with other dental specialists.

Sharing Patient Information Securely

Jakari Care also offers a Jakari Referral Center that allows you to send and receive referrals to dental specialists (such as oral surgeons) using the Jakari Care tablets and web portal. The Jakari Referral Center allows you to track the progress and satisfaction level of each referral at the specialist's office and coordinate care through the Jakari Care web portal (Figure 4).

Many dental practices today transmit patient information to specialists via clear-text email, which may constitute a HIPAA violation and subject you to a significant fine. With Jakari Care, your practice can share information such as X-rays, health history, progress reports, and imaging in a HIPAA-compliant manner.

Summary

Jakari Care and Dentrix are a powerful combination that can help your practice realize multiple benefits. Jakari Care can improve the productivity and effectiveness of your staff by reducing the time needed to collect patient information, update health history, and make it easier for your practice to transition to a fully paperless office. It also helps you analyze the patient information you collect so you can improve patient education, which can lead to higher acceptance of treatment plans and enhance patient care.

Jakari Care also helps you generate new patient referrals. And when your dental practice uses Jakari Care to share patient information with other providers, you can do so in a HIPAA-compliant manner.

To request a no-obligation online demo, email demo@jakaricare.com. **DM**

DENTRIX Connected

SOLUTION GUIDE

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www.bitebankmedia.com

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www.healthcard.citicards.com

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DENTRIX G5 CONNECTED

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www.demandforce.com

Patient Communication Solution

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DENTRIX G5 CONNECTED

Dental Symphony
www.dentalsymphony.com

Dental Practice Solution

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DEXIS
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Digital Diagnostic Imaging

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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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

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.

The businesses listed here are not owned or controlled by Dentrix or Henry Schein and have created these descriptions of their company, products and services themselves. Dentrix and Henry Schein make no independent assessment of the above descriptions and consumers should contact these providers directly if seeking additional information about their products or services.

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