dentrix

Protecting Your Practice Data

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Restore From Previous Backup

Practice Data

Peace of Mind in: 28 minutes

39% Complete

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What's Your Backup Plan?

My daughter uses her computer every day for work, play, and storage—lots of storage. She stores thousands of photos, videos, and songs on her computer. She recently called me from college with a crisis: her laptop was malfunctioning, and she didn't have a current backup. I didn't know how to help her, so she went to the on-campus computer center where a skilled technician discovered that her hard drive was failing. To my daughter's relief, the tech was able to back up her data and replace her failing hard drive with a new one.

You don't want to find yourself in my daughter's situation, especially when it comes to your practice data. Busy dental offices use computers to store all kinds of critical data: patient contact information, insurance and accounting records, radiographs and intraoral photos, exam and treatment records, operatory schedules, and more. According to a frequently-cited study conducted by the University of North Carolina, a hard drive crashes every 15 seconds, and 44 percent of data loss is caused by mechanical failure. What's your backup plan?

In this issue of Dentrix Magazine, we introduce eBackUp (page 12). eBackUp is an automated data backup program that backs up your valuable data online to a secure remote location, protecting it from loss due to hardware failure, human error, theft, or natural disaster. In our review, we'll show you how eBackUp makes it easier than ever to set up and verify your data backups.

In this issue we also share tips to help you plan your next software, computer or network upgrade (page 16). A technology-optimized office not only improves patient care, it also simplifies practice management, helps you attract and retain quality team members, enhances your professional image, and helps protect you against data loss.

I hope you enjoy learning about these topics and others in this issue of Dentrix Magazine. If you have questions, comments, or suggestions to help us improve the magazine, please email them to dentrixmagazine@henryschein.com.

Regards,

Matt Singerman
Editor-in-Chief

dentrix
MAGAZINE

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DEPARTMENTS

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Q: Should Websync be enabled and running on all of our machines?

A: No. Websync should only be enabled on one computer in your office. Furthermore, it is ideal to set the Websync to run during a time when the office is closed, so it is recommended that Websync be enabled on a computer that is always on (like the server). If you want to disable Websync on all the other computers, open the DXWeb toolbar, click the Settings button (the wrench icon), and then click WebSync Wizard. In the **WebSync Wizard**, click **Next**, and then select **Do not run websync automatically**. To finish the Wizard and save the setting change, keep clicking **Next** until you get to the end of the Wizard, and then click **Finish**.

Q: Why are the production amounts for scheduled production in the Appointment Book different than those on the day sheet?

A: The scheduled production figures in the Appointment Book and on the day sheet are designed to help you analyze different aspects of practice productivity. Scheduled production is an estimate of how much your practice is scheduled to produce on a future date. The day sheet displays the total production for procedures that have already been posted to the Ledger.

If patients elect more procedures and services than those for which they are scheduled, those extra charges are posted in the Ledger or Patient Chart instead of by changing the scheduled treatment in the Appointment Book; thus the day sheet charges will be higher than the scheduled production.

Q: How can I keep track of my claims without having to print all my transmission reports?

A: eCentral includes an Insurance Manager tool that allows you to search for all claims within a three-month period and view the status of claims. If you are looking for a claim for a specific patient, you can search for it by the claim number or the patient's subscriber ID number. The Insurance Manager also allows you to view the eligibility status of a patient. For information on eCentral or to sign up for this service, visit www.dentrix.com/products/eservices/ecentral or contact eServices Support at 1-800-734-5561.

Q: What do I need to do to keep patient data in Dentrix Mobile up to date?

A: To keep Dentrix Mobile up to date, you must run a WebSync to synchronize the data in your practice management database with eCentral. (eCentral is where Dentrix Mobile accesses the data.) You configure a WebSync using the WebSync Wizard in Dentrix. From the toolbar of any Dentrix module (such as the Appointment Book), click the DXWeb Toolbar icon . The wizard steps you through the process of setting up a WebSync. You can set up the WebSync to run either automatically or manually. If you set up WebSync to run automatically, it should run at least once a day so your Dentrix Mobile information doesn't become outdated. For more information, see "Setting up Dentrix Mobile using the WebSync Wizard" in the Dentrix Help.

Do you want to submit a technical support question to Dentrix Magazine? Send your question to dentrixmagazine@henryschein.com. Please type "Q&A" in the subject line.

HOW TO LEARN MORE

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

Dentrix Help Files

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

Dentrix eNewsletter

Sign up for the free Dentrix eNewsletter and receive tips for using Dentrix, practice management advice from industry consultants, and news about product releases and training events. Sign up today at www.dentrix.com/newsletter. To read previous articles, visit www.dentrix.com/newsletter-archive.

Dentrix Resource Center

The Dentrix Resource Center offers an online library of on-demand software tutorials and product manuals, a technical support knowledgebase, and opportunities to register for webinars with Dentrix experts. Access is free for dental practices on a Dentrix Customer Service Plan. Log in today at www.dentrix.com/resource-center.

MyVoice for Dentrix

Do you have an idea for a new feature in Dentrix? Do you want to share it with the Dentrix product managers and other Dentrix users? Visit MyVoice for Dentrix where you can share your great ideas and "vote up" the best ideas shared by others. Log in today at http://myvoice.dentrix.com.

Release News

▼ eBackUp 11.0

Henry Schein understands the importance of protecting patient data from threats such as hardware failure, human error, theft and natural disaster. That's why the new version of eBackUp, due to be released in Q2 2011, makes safeguarding patient data easier than ever.

eBackUp 11.0 has a new user interface that simplifies the process of setting up and managing backups. A wizard guides users through the process of selecting the correct files and programming backup times—all to ensure important files are properly backed up and available when needed.

"Losing patient data would be catastrophic for most practices. eBackUp can help eliminate that risk," said Adam McDaniel, eServices Product Manager. "eBackUp 11.0 provides even greater peace of mind since users can set it up with greater confidence."

The new user interface also makes it easier to restore data and view data backup histories.

"The timing of this release coincides perfectly with a recent upgrade to our servers," said McDaniel. "The new hardware supports even faster data backups."

Another benefit of eBackUp 11.0 is that it is compatible with Windows 7 and Windows Server 2008 R2, so a greater number of customers can benefit from commercial-grade data protection.

Dentrix users on a customer service plan are entitled to five free gigabytes of eBackUp data storage and discounts on larger storage amounts. Visit www.dentrix.com/ebackup or call 800-734-5561 for more information about protecting your patient data.

▼ CDT 2011/2012 Code Update

The ADA has released the 2011/2012 CDT codes. The new codes are effective beginning January 2011. In this update, there are only eight new codes and there is no new claim format.

An automatic update is available for customers using Dentrix G4 with Productivity Pack 8. If you are on a Dentrix Customer Service Plan, there are three ways you can get the update: downloading the installation via the Check for Updates feature, downloading the installation from the Dentrix website, or purchasing an update CD from Dentrix Sales.

To download the update via the Check for Updates feature, right-click the **Dentrix Quick Launch** icon on the Windows taskbar and click **Updates > Check for Updates**. To download the update from the Dentrix website, browse to www.dentrix.com/support/software-updates/g4. To purchase the update on a CD, call Dentrix Sales at 1-800-DENTRIX. The price of the CD is $14.95, which covers the cost of shipping and handling.

If you are using Productivity Pack 8 but you are not on an active customer service plan, you can order the CDT 2011/2012 update disk at a cost of $59.95. To order the CD, call Dentrix Sales at 1-800-DENTRIX.

If you are using a version of Dentrix prior to Dentrix G4 Productivity Pack 8, you must manually add the eight new CDT codes to Dentrix. To view the steps for adding the codes manually or to get a list of the codes that are included in the update, visit www.dentrix.com/resource-center, enter your customer ID and ZIP code to log in, and search for article #50270.

Regardless of which version of Dentrix you are using, you must enter the fees for the new codes manually. To enter the fees for the CDT 2011/2012 codes, open the Office Manager and click **Maintenance > Practice Setup > Procedure Code Setup**.

For more information about the CDT 2011/2012 update, please visit the Dentrix Resource Center to view article #50270 or browse to www.dentrix.com/support/software-updates/g4.aspx. If you're not on a customer service plan and would like to access the Resource Center, please call 1-800-DENTRIX to speak with a sales representative and sign up for a Dentrix Customer Service Plan.

▼ Dentrix Awards and Recognition

Leading industry organizations recognize the innovation, excellence and value that Dentrix solutions and services deliver to over 30,000 dental practices.

Pride Institute 2010 Best of Class Technology Award Winner

For the second consecutive year, Dentrix has been recognized by the Pride Institute as a 2010 Best of Class Technology Award winner. Dentrix was selected because of its innovative approach to designing practice management solutions that help practices become more efficient and profitable. Products recognized were chosen through an unbiased, rigorous assessment and selection process in conjunction with a distinguished panel of recognized technology experts. The chosen technologies were divided into four categories: Foundational, Diagnostic, Therapeutic and Emerging, with Dentrix falling into the Foundational category. Panelists were looking for technologies that took a category to a new level or stood out within the category. The winners were selected after a lengthy debate by the experts, followed by a majority vote.

Dentistry Today Reader's Choice Top 50 Technology Products

Dentrix Mobile, the newest feature in Dentrix G4, has been selected by Dentistry Today readers as one of the top 50 technology products in the industry. Dentrix Mobile delivers secure, on-the-go access to Dentrix data on popular devices like iPhone, iPad, Palm Pre, Android and select BlackBerry models. With Dentrix Mobile, you can access patient data anytime, verify patient prescriptions, quickly see appointments and deliver real-time updates for on-call teams. Learn more at www.dentrix.com/mobile.

how it works:
The Collections Section
of the Practice Advisor Report

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

Practice Advisor R

Active Patient Base by Last Visit: 1

COLLECTIONS as of 05/2

Practice Totals	Apr 10		MTD May		Benchmark
A/R to Production	47,582.24	0.69	51,378.41	0.83	1.5 - 2 X's
A/R over 90 days (% A/R)	25,663.32	54%	26,215.83	51%	15% - 30%
Collections (% Production)	67,441.93	97%	51,606.58	83%	
Over-the-Counter Collections (% Production)	33,753.16	49%	28,483.58	46%	30% - 40%
Adjustment to Collections	8,861.43		6,107.25		
Adjusted Collections (% Adj Production)	76,303.36	110%	57,713.83	93%	98%
Collections from Insurance	33,645.77		23,123.00		
Collections from Patients	33,796.16		28,483.58		

Aged Accounts Receivable	Current		31-60	
Accounts Receivable	20,119.36	39.75%	4,321.50	8.41%
A/R with Pending Insurance Claims	62,378.00	310.04%	12,477.00	288.72%

1 This row shows the combined dollar amount of all account balance (your total A/R) divided by the total production. The benchmark, based on recommendations from consultants, indicates that your accounts receivable should not be more than 1.5 to 2 times the monthly production.

2 This row shows the total dollar amount of all money collected from both insurance companies and patients.
The percentages indicate the percentage of the total production that has been collected.

3 This row shows the dollar amount of collections for your practice. The collections that are counted here are the ones attached to the billing types you set up as over-the-counter collections in the Practice Advisor Setup. From the Practice Advisor dialog, click **Practice Advisor Setup**, then click **Assign Payment Types as Over-the-Counter Collections** and move the payment types you want to count as over-the-counter collections to the Over-the-Counter Collections Payment Types column.
The percentages in this row are the percentages of the total production that has been collected through one of the over-the-counter collections methods.

4 This row shows the total dollar amount of the adjustments you made to collections. The adjustments that are included in this amount are the adjustment types you set as Collections Adjustments in the Practice Advisor Setup. From the Practice Advisor dialog, click **Practice Advisor Setup**, then click **Assign Adjustments Types as Production/Collections** and move the adjustment types you want to count as adjustments to collections to the Collections column.

5 This row shows the total dollar amount of your adjusted collections (your total collections minus your total adjustments to collections).
The percentages indicate the percentage of your adjusted production (from the Production section of the report) that has been collected after collections adjustments have been applied.

Variance		YTD May 10	Benchmark	Variance	
0.92	8	51,378.41			
-29%	5	10 1,215.83			
		695.08 85%			
11%		179,527.39 46%	30% - 40%	11%	
		41,350.09			
-3%	5	370,045.17 95%	98%	-3%	5
		148,525.29			
		180,169.79			

61-90	Over 90	Balance
721.72 1.40%	26,215.83 51.02%	51,378.41 100%
0.00 0%	1,286.20 4.91%	76,141.20 148.20%

For a full explanation of each row and column in the Collections section of the Practice Advisor Report, view the Help files within the Practice Advisor or view the Practice Advisor Tutorial in the Dentrix Resource Center. See "How to Learn More" on page 7 for instructions on accessing these resources.

6 This row shows the combined dollar amount of all account balances. These totals are broken down into standard aging brackets.

The percentages indicate the percentage of the total accounts receivable balance that is within each aging bracket.

7 This row shows the combined dollar amount of all account balances that are tied to pending insurance claims. These totals are broken down into standard aging brackets.

The percentages indicate the percentage of the total accounts receivable within each aging bracket that is tied to insurance claims. The percentage in this row may be greater than 100% if the total dollar amount tied to insurance claims is greater than the dollar amount in the row above, meaning you have more money tied up in outstanding insurance claims than in outstanding patient balances.

8 This column shows the difference between your collections statistics and the benchmarks. When there is a benchmark range, the variance is calculated using the average of the benchmark range and your MTD (month-to-date) statistics.

For example, the benchmark range for over-the-counter collections is 30% - 40%. The average of that range is 35%, so the variance is based on that number. Since the MTD total is 46%, the variance indicates that you are 11% over the benchmark of 35%.

Because the variance is calculated based on the average of the benchmark range, you may have a negative number in the variance column but still be within the benchmark range. If your statistics are lower than the lowest end of the benchmark range, a yellow icon appears in this column. (See Note 10.)

9 This column shows the monthly collections benchmarks for your office. The benchmarks are the expected collection ranges for a solo general practice (based on an estimated national average). You can customize these benchmarks to fit your office.

The benchmarks were recommended by practice management consultants including the Pride Institute and Jameson Management. You should only customize these ranges for your practice under the guidance of a consultant familiar with collection norms in your area.

From the Practice Advisor dialog, click Practice **Advisor Setu**p, then click **Benchmarks Setup**.

10 This icon appears when the number in the variance column is negative. The number inside this icon corresponds to a set of recommendations for improvement listed in the Recommendation Footnotes section of the Practice Advisor Report. The recommendations were provided by practice management consultants including the Pride Institute and Jameson Management.

Protecting Your Practice Data

by Damon Graves and Roger Gagon

Restore From Previous Backup

Practice Data

Peace of Mind in: 28 minutes

How reliable is your computer hardware? According to a frequently-cited study conducted by the University of North Carolina's Information Technology Services, a hard drive crashes every 15 seconds, and 44 percent of data loss is caused by mechanical failure.

Imagine how hardware failure would affect your practice. If you're not backing up your data, a simple hardware failure could cause you to lose your entire patient database, including patient contact information, scheduled treatments, patient medical history, and more. Based on the statistical evidence, hardware failure might not be a question of if, but when.

Dr. H. Arthur Missirlian's practice in Fort Collins, Colorado, experienced just such a failure. When his practice lost its server due to a hard drive crash, Dr. Missirlian and his team had to take actions to minimize the impact. Fortunately his practice had its data backed up with eBackUp and was able to restore the patient information with minimal loss. "What a lifesaver!" said Jennifer St. Cyr, the patient coordinator at Dr. Missirlian's office. "It was great to be able to rely on the backups to be restored quickly and correctly."

Hardware failure isn't the only threat to your patient data. Human error, theft, and natural disaster are also on the list of common causes for data loss. The good news is, you can do something to protect your data, and it isn't expensive.

Protecting Your Data

eBackUp is an automated data backup program that backs up your valuable data online to a secure remote location, protecting it from local threats. Since the data is encrypted and transferred electronically, your patient information is never at risk of falling into the wrong hands.

Dentrix users on a customer service plan are eligible for five free gigabytes of data storage and discounts on storage space exceeding that amount.

To begin using eBackUp, go to the eBackUp page on the Dentrix website at www.dentrix.com/products/eservices/ebackup, click the Registration link, and complete the online registration form. The eBackUp support team recommends that you sign up for the additional eBackUp Log Monitoring Service. With this additional service, the eBackUp account management team will monitor your daily backups and notify you if your backup fails, your backup is incomplete, or your data has not been backed up for more than two days.

If any of these conditions is detected, you will be contacted by phone (via a voice broadcast) and have the option of connecting directly to a customer support representative. Having the eBackUp account management team monitor your data backups offers some peace of mind and allows you to focus on the care of your patients.

After registering for eBackUp, you'll receive a welcome letter informing you that your eBackUp account is now active and you can perform a baseline data backup. The eBackUp support team is available to help set up the automated process and perform your initial backup.

Setting The eBackUp Settings

Before you select the data you want to back up, you need to set certain eBackUp default settings. From eBackUp's **Home** tab, click **Settings**, and then click **Default Settings**. Under **Backup Mode**, make sure you set the **Mode to Full** (which is a change from previous versions of the eBackUp software). Full backup mode now scans all the files marked for backup, but only backs up those files that have changed since the last backup.

Click the **Restore tab**.

On the **Restore tab** (Figure 1), you specify how and where a backup will be restored if you ever lose data and need to restore a backup. Backups should always be restored to a location other than your primary database to prevent unintentionally overwriting good database data you with a backup that isn't as current. Never overwrite your primary database with your backup data until you have verified that your backup data is good. For this reason, we recommend that you select the following settings on the **Restore tab**:

• Do not overwrite existing files

• Restore file(s) to alternate location (Use the Browse button to specify a path for restored files. It is recommended that you browse to the Desktop at the top of the list and have your files restored there.)

• Restoring the final incremental, or this is a full restore

Figure 1 Configure your Default Settings Restore tab as shown here.

Click the Notification tab and select the following options:

Under Log Creation Options, select Detail.

Under **Log Delivery Options**, select **E-mail log files**, and then click **E-mail Settings** and specify your e-mail address information. (See knowledgebase article 33551 in the Dentrix Resource Center, www.dentrix.com/resource-center, for configuration and password information.)

Under **Log Delivery Options**, select **Always**.

When finished, click **OK**.

Selecting The Folders And Files To Back Up

Now that the backup settings are selected, you can begin to select the data you want to back up. In the eBackUp window, click the **Backup** tab (Figure 2). In the **Backup Name** field,

specify a name for your backup, then select the folders and files you want to back up. We recommend that you back up ALL of your important computer files; however, it is critical that you back up your important Dentrix database files at a minimum. We recommend that you back up your data as shown in Figure 2. In the frame on the left, in the Dentrix folder, select the DATA folder and all folders underneath it except the Installs folder. You should also select the Cust and DOC folders under Dentrix. Verify that all the .dat and .idx files in the **Name** column on the right are selected; the dtxdata.inf file must also be selected. If these files are not selected, the database will not be backed up.

After selecting the folders and files you want to back up, click the Save icon 🖫 at the top of the eBackUp window.

Scheduling Your Backups

Once your backup settings are configured and your files and folders have been selected for backup, you are ready to schedule your backups. In the eBackUp window, click the **Schedule** tab. Click **Add** to display the **Schedule Options** dialog box.

Schedule your backups to run at the desired time and click **OK**. Make sure you schedule your backups to run at a time when office staff are finished using Dentrix and all Dentrix modules have been closed for the day.

The backup job is added to the Scheduled Jobs list.

Remember to keep the Dentrix server (and any other computers you want backed up) powered on and connected to the Internet or they won't get backed up.

Verifying Backups

You should verify every day that your backups are taking place. In eBackUp, click the **Logs** tab (Figure 3) and look at the **Errors** and **Warnings** columns. A good backup should have no errors or warnings. Verify that the **Objects Selected** and **Objects Completed** match.

Now that you've completed these steps, your practice data will be backed up regularly and you'll be able to restore it if you ever need it. If you need assistance restoring a backup, eServices Customer Support is ready to help. Just call them at 1-800-734-5561. You should practice using the restore backup procedure periodically to verify the integrity of your backup data.

Using eBackUp to secure your patient data will help ensure that your valuable patient data is never lost. **DM**
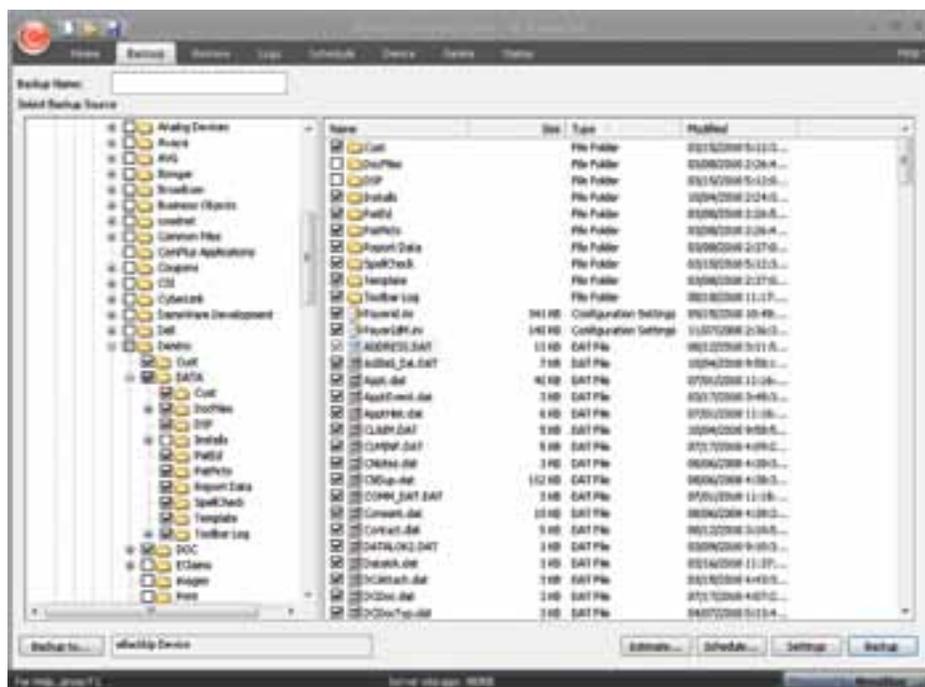

Figure 2 Back up your Dentrix database as shown here.

Figure 3 Verify your backups daily using the Logs tab.

the benefits of the
technology-optimized office
by robert staub

Maybe everything is going smoothly. Maybe you're consistently busy taking care of patients from morning until night. But do you ever walk into your office and sense that your practice is a little behind the times? You advise your patients to have an exam every six months. When is the last time you examined the health of your office technology? Maybe it's time to make some improvements.

Advances in dental technology over the past decade have been spectacular. Think about the high-tech innovations that are commonplace in dental practices today: digital X-rays, intraoral cameras, laser technologies, electronic charts, dental practice management software—and that's just the short list.

Advanced technology in your practice not only improves patient care, it simplifies practice management, helps you attract and retain quality team members, and enhances your professional image. What's more, when you're ready to retire, if your practice is chock full of the latest technologies, you may be able to get a higher selling price.

However, right now you may be more interested in cutting expenses than investing in technologies. And who could blame you? Times are tough. But set aside those "survival mode" thoughts momentarily and read on, because there are a few things to consider that just might prompt you to go digital in a big way. Sooner rather than later.

Patients Are Plugged In

This is especially true of young people, but it applies across the board: Patients associate leading-edge technologies with getting the best care. They want to be dazzled by everything from convenient scheduling and payment options, to high-tech diagnostic equipment, to the sleek chair they're reclining in. What's more, they want to request appointments via your practice website, receive appointment reminders on their smartphones, and pay bills online with a credit or debit card. They like the idea of "going green" with electronic charts instead of paper. Free Wi-Fi in the reception area is nice, too. And a wireless headset in the treatment room that's hooked up to a TV in the ceiling wouldn't hurt either.

Impress them and they will share their positive feelings with their friends on Facebook or Twitter the same day. Did you know that Facebook reaches more than 500 million active users?[1] Do you know how many tweets people send every day? (Answer: 140 million! [2])

Your Staff Will Want To Stick Around

Chances are, your practice employs young professionals who are serious about their careers and want to stay as current and capable as they can. The latest equipment and applications will help them to do exactly that. Moreover, the latest tools can help to improve your dental staff's job performance by simplifying and accelerating their tasks—further enhancing employee satisfaction while improving patient care.

Higher Quality Of Care

Digital radiography exposes your patient and staff to as much as 80 percent less radiation.[3] Dental lasers are more precise and enable dentists to perform more procedures. Digital impressioning enhances accuracy, saves time, and leads to better restorative outcomes. And the list goes on. But suffice it to say that the latest technologies can make a big difference in the practice of dentistry. For the better.

More Money At Retirement Time

Of course one never knows what the economy will be like down the road, but a rule of thumb in the industry is that, at retirement, you can reasonably expect your practice to sell for between 40 and 65 percent of the average of your last three years of gross income.[4] Investing in current technologies, especially if you have at least five years before retirement, is among the things that can catapult your practice into the 65 percent range.

Technology Gives You An Edge

There are several tangible, "tech-related" reasons for embracing advanced technologies. For starters, you get higher software speeds and better performance overall. Equipment reliability goes up and risk of breakdown goes down. Your operatory technologies and the applications you share throughout the office can be more tightly integrated and responsive. And you can take security and regulatory compliance to the next level. There's also an intangible benefit that's just as important as everything else, and that's the enhanced professional image

you'll enjoy. Using the latest technology in your office will convey your commitment to the latest and best dental procedures. You'll notice a difference, and so will your patients.

The No-Nonsense Way To Get It Done

Perhaps you have already decided it's time to upgrade your technologies. But where to start? You might begin by replacing outdated technologies with ones that are most likely to enhance your practice's productivity and image while improving patient care. You may want to invest in digital radiography or intraoral cameras, for example, or update your practice management software. You might also plan to upgrade your network performance. That last item doesn't mean replacing all of your computers and servers and pulling the cable from your walls. It just means making sure you have enough bandwidth, memory and processing power so that all of your technologies are optimized.

But even if you are just planning to update your software or replace a system or two, bringing in a technology generalist is a risky proposition. Better to have dental office technology specialists you can trust to help you formulate your vision, recommend the best technologies within your budget, properly test and install the technology, and provide comprehensive support. Dental office technology specialists can create a setting in which your technologies work best for you.

And that's where Henry Schein TechCentral comes in. TechCentral is the single-source provider of integrated technology solutions and support for dental practices. Whether you are building a new state-of-the-art practice or simply updating your existing office technology, TechCentral can step you through the process and deliver the results you're looking for.

Dr. Larry Emmott, President of Emmott on Technology LLC in Phoenix, Arizona said, "It's easy to be dazzled by all the amazing new high-tech devices introduced to dentistry: 3D virtual patients, online communications, paperless records, and all the rest. However, all of this amazing stuff is only possible with a solid technology infrastructure—that is, a network of computers linked to a powerful server that works quickly, efficiently, and reliably. In the old days there was a lot of frustration because too many dentists were relying on somebody's nephew who dabbled in computers on weekends. Invariably, the server would start burning up on a Monday morning, just when that kid was starting his day job. Needless to say, it wasn't a formula for success. But things are different today. Henry Schein TechCentral has a national team that specializes in both computer technology and the unique needs of the dental office. Optimizing dental practices from a technological standpoint is all they do. They know how to make the dentist's vision a reality."

Practical tips for upgrading your technology platform

Dentists have many options for technology support. Individual family members, friends, and neighborhood computer enthusiasts are all willing to help. But the safest course of action is to enlist a team of experienced dental technology professionals. Consider these tips when planning your next technology upgrade.

- **Hire professionals who understand your vision.** That means digital technologists who can visualize—and deliver—the end product the way you see it. And beware of working with multiple computer hobbyists who don't see eye to eye or understand how to integrate dental technologies and the network and hardware that drive them. Better to have one team that sees the big picture and can make it a reality.

- **Experience matters.** Bring in people you can trust based on years of experience working in dental practices. Dental technology specialists, like dentists, improve with real-world experience. An experienced technologist is the ideal partner.

- **Standardized platforms are more reliable.** A lot of technicians customize the servers, PCs and other infrastructure components for dental practices. But the troubleshooting process can be brutal when something goes wrong, and replacing components can be expensive and time-consuming. In contrast, with standardized, stable platforms that feature the highest-quality components and are built specifically for dental offices, you know exactly what you're getting, and maintenance and support are easy.

- **Leverage the value of industry partnership.** Dental office technology specialists, such as Henry Schein TechCentral, deal in volume and have strong, longstanding relationships with key hardware and software vendors. These relationships tend to bring costs down, accelerate delivery of products, and enable the highest levels of support.

- **Learn from big business.** Large corporations set strategic goals and then determine what technologies they need to invest in. They maximize the return on their investment by properly maintaining and refreshing the technologies that drive their business. Successful small businesses, including dental practices, follow the same approach.

- **Remember, breakdowns never occur at convenient times.** To prevent their occurrence, find a partner who can make sure your infrastructure and all of its components are in tip-top condition—and does so on a pre-determined schedule.

TechCentral works closely with leading technology manufacturers, including Dexis, Dentrix, Dell, Checkpoint, Samsung and others. Together, they build standardized platforms for dental offices—platforms that are built to the TechCentral engineering team's design specifications. These standardized platforms and strong partnerships ensure that you get powerful, reliable, competitively priced solutions that have been proven through installations in thousands of dental practices large and small. And, because TechCentral keeps platforms and technology components in stock, they can provide surprisingly fast delivery and setup.

What's more, unlike other vendors or consultants who have hidden costs or hourly charges, TechCentral guarantees you pay for only what is quoted, and that the finished product will meet or exceed your expectations.

Bring In The Big Guns

The people at Henry Schein TechCentral have dental technologies down pat. Every day, in all 50 states, they deploy solutions that change practices dramatically for the better. To learn more about how TechCentral can help you transform your practice with the latest technologies, call 1-800-288-7691 or visit www.henryscheindental.com/techcentral **DM**

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1 Source: Facebook, http://www.facebook.com/press/info.php?, March 16, 2011

2 Twitter Blog, http://blog.twitter.com/2011/03/numbers.html, March 14, 2011http://techcrunch.com/2010/02/22/twitter-50-million-tweets-day/

3 "Why switch to digital radiography?" by Gordon J. Christensen, D.D.S., M.S.D, Ph.D. http://jada.ada.org/cgi/content/full/135/10/1437

4 "Valuing a Practice: A Guide for Dentists," published by the American Dental Association

Using the Treatment Manager to Keep Your Schedule Full

Learn how to fill openings in your schedule and increase production with the Treatment Manager.

■ **Cindy Day** | Field Training Manager

On Monday morning Maria, the Office Manager at Happy Smiles Dentistry, comes in and looks at the Appointment Book for the day. She thinks, "Wow, my Appointment Book is full! I'm happy and the dentist is happy! We have a productive day to look forward to."

But the happiness fades as the receptionist announces, "Mr. Jones just cancelled his crown prep!"

"Now what do I do?" Maria thinks. "It's 9:00 a.m. and his appointment was scheduled for 11:00!"

The first list she checks is the ASAP list. When it is exhausted, she checks the Unscheduled List. When that, too, is exhausted, the next place she should check is the Treatment Manager. With the Treatment Manager, Maria can fill the hole in the schedule without the dentist realizing there was ever an opening until she lets her know that Mr. Jones had cancelled his 11:00 am appointment.

What is the Treatment Manager? The Treatment Manager is a secondary module within the Appointment Book and Chart modules. This module helps you search for treatment cases that meet your desired criteria so you can view patient and insurance information and schedule appointments. The Treatment Manager helps you fill openings in the Appointment Book and maximize your production totals.

Scheduling From The Treatment Manager

To open the Treatment Manager and generate the list, open the Appointment Book and select **Options**, then **Treatment Manager**. From the Treatment Manager View window (Figure 1), you can establish the criteria you are searching for to fill the holes in your Appointment Book. Do you want to use any procedures to fill the holes, or do you only want to use crown codes? Do you

Figure 1 You can use search filters to narrow the results in the Treatment Manager.

Figure 2 The Treatment Manager helps you search for treatment cases that meet your desired criteria so you can view patient and insurance information and schedule appointments.
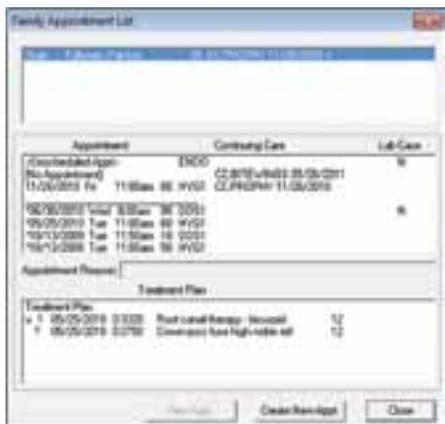
Figure 3 The Family Appointment List shows all the members of the family, their appointments, their continuing care due dates, and their treatment plan information.
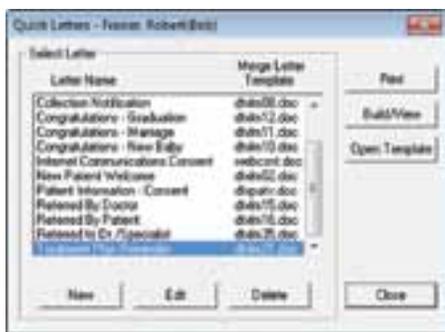

Figure 4 You can print letters for one specific patient using Quick Letters.

want to focus on patients whose production is over a certain dollar amount? It is your choice to decide what will work best for your schedule and your production goals. You can also choose patients who have primary insurance, no insurance, and so forth so you can call patients who are likely to accept the open appointment.

When you click **OK**, the Treatment Manager will generate a list of patients with outstanding treatment procedures (Figure 2). By default, the patients are listed in alphabetical order. You can click on the Last TP column heading, and it will sort the treatment with the oldest plan first. You will be able to view any remaining dental insurance benefits and if the patient has a scheduled appointment. Now your search begins! Multiple treatment plans at your fingertips! This module is for busy dental offices that need easy and quick access to fill the Appointment Book and increase the practice's production.

When you double-click on any patient's name in the Treatment Manager, the **Family Appointment List** dialog box appears (Figure 3). The patient's treatment plan is listed in the lower part of the dialog box. Call your patient and if the patient is ready to schedule his or her outstanding treatment, click **Create New Appointment**. You can make an appointment for your patient right from the Treatment Manager. It's that easy.

Quick Letters From The Treatment Manager

If you choose to mail a letter to remind your patients that they have an outstanding treatment plan, Dentrix provides an easy solution. You can highlight the patient's name, click the **Quick Letters** button, and select the letter you want to send (Figure 4). Then, all you have to do is click **Print**. This letter will remind your patients they have outstanding treatment and tell them the amount (if any) of insurance benefits that are remaining. Sending these letters to patients helps you increase productivity.

Note: By default, the Treatment Plan Reminder letter is not available in Quick Letters. To add that letter to Quick Letters so you can access it from the Treatment Manager, click the **Quick Letters** button to open the Quick Letters dialog box and click **New** . In the **New Quick Letter** dialog box, type "Treatment Plan Reminder" in the **Letter Name** field. Type "dtxlm21.doc" in the Merge Letter Template field. Select the privacy request settings you want and click **OK**.

This simple process of sending treatment reminder letters also includes printing labels from Dentrix. You don't have to write out names and addresses on envelopes—you can create mailing labels for each letter with Quick Labels. In the Treatment Manager, highlight the patient's name, click the **Quick Labels** button, select the label you want to create, and click **Print**. You just have to peel and stick.

Other Treatment Manager Options

Because the Treatment Manager is a secondary module in Dentrix, you can access any other Dentrix module from the toolbar in the Treatment Manager. With a mouse click, you can easily switch between modules to view patient balances, treatment cases, insurance information, and patient's dental activity.

The Treatment Manager is accessible from the Appointment Book and the Patient Chart. Next time your office is having difficulty filling holes in the Appointment Book, use the Treatment Manager to optimize your schedule and increase your daily production. **DM**

LEARN MORE

To learn more about using the Treatment Manager, see the Treatment Manager overview topic in the Dentrix Help. You can also visit the Dentrix Resource Center to view these on-demand training titles: Treatment Manager and Collections Manager, Treatment Plan Reports, Schedule Optimization, Production and Case Acceptance. See "How to Learn More" on page 7 for instructions on accessing these resources.

Creating a Letter Merge of Treatment Plan Reminder Letters

If you choose to send out treatment plan reminder letters in bulk, you can use the Letter Merge feature in the Office Manager. To create a letter merge, click **Letters**, then **Misc.**, and then select **Treatment Plan Reminder** from the list. Click **Create/Merge**. To search the database for patients who fit the criteria and create the letters, mark **Create Data File and Merge Letters** and click **OK**.

Simplify Prescriptions with Dentrix

With the Prescriptions module, you can improve record keeping, streamline refills, and enjoy after-hours access to important prescription information.

■ **Gentry Winn** | Contributing Editor

As you prescribe medicine in your practice, you may encounter some common problems:

• **Poor record keeping** - If you don't store medication history for all your patients in one location, tracking the many prescriptions you write can be difficult.

• **Inefficiency** - Refilling a prescription can waste time if you have to retype the information.

• **Fraud** - Prescription fraud is a growing crime and can happen in any office.

• **Limited access after hours** - Not having access to prescription information when a patient calls you after hours can be inconvenient.

This article explains how the Dentrix Prescriptions module can help you solve these problems in your office.

Keeping Consolidated Prescription Records

Using the Prescriptions module as a central location for all your prescriptions makes it simple for you to track prescription history for patients and monitor prescription usage in your practice. To generate the Prescriptions Report, from the Prescriptions module, click **Reports**, select the desired report options, and then click **Print**.

Increasing Efficiency

With the release of Productivity Pack 8, you can refill prescriptions easily and back-date prescriptions when necessary.

To refill a prescription, from the **Patient Prescriptions** dialog box (Figure 1), select a prescription, click **Refill**, change any particulars of the prescription as needed (such as the number of refills), and then click **OK** to print and save the prescription as a new prescription. The original prescription remains unchanged.

Sometimes you may need to change the prescription date to something other than the date it's entered into Dentrix to maintain accurate records. For example, if the doctor calls in an after-hours prescription on Monday evening, the staff will need to enter the prescription in Dentrix on Tuesday morning and backdate the prescription date. To back-date a prescription, from the Prescriptions module, click **New** to enter a new prescription. In the **New Patient Prescription** dialog box (Figure 2), change the **Date**, enter the rest of the prescription details, and then click **OK**.

Figure 1 You can easily refill a prescription.

Reducing Fraud

Using the Audit Trail Report, you can see if any prescriptions have been deleted and identify any suspicious activity. The report can even be filtered by user and run for a specific date range.

To generate this report, in the **Office Manager**, from the **Maintenance** menu, click **Audit Trail Reports**. In the **Select Changes for** list box, make sure you select **Prescriptions**, set up any other report options, and then click **OK**.

Accessing Patients' Prescriptions Anytime, Anywhere

Using Dentrix Mobile and the latest version of the DXWeb toolbar, you can view prescription information for patients at any time from your mobile device or smart phone (iPhone, Blackberry, iPad, Palm Pre, and devices running Android).

To do this, you'll need to perform Web syncs that include Appointment Manager/Mobile Uploads and Patient Uploads. (The WebSync Wizard is part of Standard eCentral, which is included in the Dentrix Customer Support Plan.)
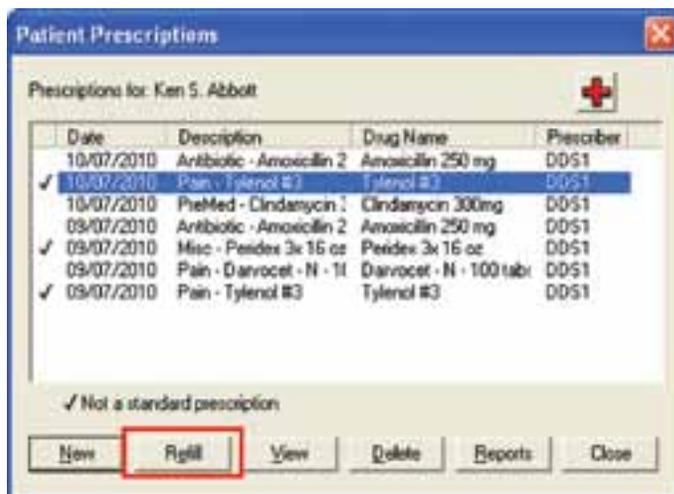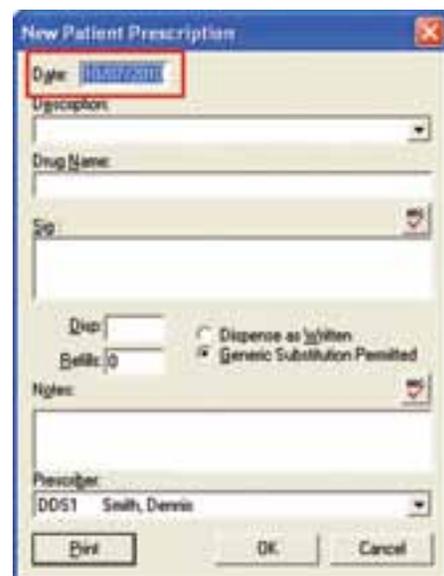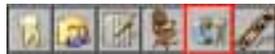

Figure 2 You can back-date a prescription.

To set up the WebSync Wizard, from any of the main Dentrix modules, click the **DXWeb** button on the Dentrix toolbar.

This opens the DXWeb toolbar. Click the **Settings** button.

Then click **WebSync Wizard** to start the wizard. On the WebSync page, under **WebSync Options**, select **Correspondence Upload**. Also, set up the appropriate options on the Correspondence page. To save all the changes, on the FINISH page, click **Finish**.

The next time the Web sync runs, the prescription information will be updated. To view the updated prescription information, log in to Dentrix Mobile from your mobile device, select Patients, search for and select a patient, scroll down to the Prescriptions section, and then click the date of any prescriptions the patient has to view detailed information (Figure 3).

Figure 3 You can view prescriptions on your mobile device.

Conclusion

The new Prescriptions module features in Productivity Pack 8 allow you to quickly refill and back-date prescriptions. As in previous versions of Dentrix, you can track deleted prescriptions on the audit trail. And, with Dentrix Mobile, you can view patients' prescriptions anytime and anywhere **DM**

LEARN MORE

To learn more about the Prescriptions module, see the following topics in the Dentrix Help: Adding and editing a prescription, Setting up a printer for prescriptions, Creating prescriptions, Refilling prescriptions, Printing the Prescriptions Report, Audit Trail Report, Setting up Dentrix Mobile using the WebSync Wizard, Viewing patient information. You can also visit the Dentrix Resource Center to download the Dentrix G4 Productivity Pack 8 Release Guide. See "How to Learn More" on page 7 for instructions on accessing these resources.

Online Prescription Management Coming Soon

In 2011, Henry Schein Practice Solutions will be working with a certified e-prescription vendor to provide online, two-way communication between Dentrix and pharmacies. Development for this project will begin in 2011, and a release is planned for the same year.

Payment Agreements Benefit You and Your Patients

If patients can't pay in full at the time of treatment, and third-party financing isn't an option, a payment agreement may be the solution.

■ **Gary Frazier** | Contributing Editor

Despite the hopeful forecasts about the end of the recession, many people are still having trouble meeting their financial obligations. Some people still have to choose which bills they're going to pay. And, for many, if the choice is between paying the mortgage or the dentist, they're going to pay the mortgage. Collecting payment is often difficult even in good economic times.

Fortunately, you have some choices when it comes to ensuring that you are paid for the services you provide. If your practice is typical, according to the ADA approximately 50 percent of your revenue comes from insurance payments. To collect the remaining 50 percent, more and more dentists accept credit card payments or rely on patient financing agreements. Ideally, you want to collect your fees before or by the time treatment is completed. When that's not possible, consider setting up third-party financing through Citi Health or a recurring credit card payment through PowerPay. Both of these tools are integrated with Dentrix.

Occasionally you may have patients who need other payment options. If this is the case, you may want to set up a

Figure 1 A payment agreement is a powerful financial tool.

payment agreement. A payment agreement is a powerful Dentrix tool designed to help you and your patients. However, if you choose to set up a payment agreement, consider limiting the number of accounts you agree to finance and only finance those patients you're sure can meet the terms of the payment

agreement. You are neither a bank nor a charitable institution. And, while Dentrix makes tracking payment agreements easy, you may not have the staff, the time, or the expertise to provide and administer payment agreements with a large percentage of your patients.

You can also use payment agreements to help your patients finance procedures that are only partially covered or not covered at all by their insurance plans. For instance, you may have a patient who chooses to have an implant instead of a bridge. With a payment agreement in place, you can help your patient finance the costs related to the implant that his or her insurance won't cover. And, Dentrix allows you to set the terms of the payment agreement, including finance charges, interest rates, late charges, and grace periods. You can determine how flexible the terms should be on a patient-by-patient basis.

Collecting payment is often difficult, even in good economic times. Fortunately, you have some choices when it comes to ensuring that you are paid for the services you provide.

Setting Up A Payment Agreement

The first step in setting up a payment agreement is to open the Ledger and select a patient. From the Ledger toolbar, click the **Billing/Payment Agreement** button. The **Billing/Payment Agreement Information** dialog box appears (Figure 1).

Figure 2 You set the terms of each payment agreement.

Under **Payment Agreement (PA)**, enter an agreement date (by default the current date). Click **Terms**. From the **Payment Agreement Terms** dialog box (Figure 2), click **Select Type**, and then select a payment agreement type: Collections Agreement, Good Account Agreement, Standard Agreement, or VIP Agreement. Select a payment interval: Monthly, Semi-monthly, Bi-weekly, or Weekly. In the **Bal. for PA** field, enter the amount that the guarantor will pay off under the agreement. This can be the entire balance or a partial amount. Enter the date the first payment is due in the **First Pmt Due** field. Next, you can set up the recurring payment by either entering the **Payment Amt** or the T**otal # of Payments**. Dentrix then calculates the other field for you.

If you want, you can copy the agreement to a payment agreement note to document all of the payment arrangements that you have established over the history of the account. You can also print a truth in lending disclosure statement disclosing the terms of the payment agreement, an amortization of payments and a finance charge schedule listing the interest accrued on the balance for each payment, and a coupon book containing payment remittance coupons.

Collecting payment from patients can be difficult, but that difficulty can be lessened by using the tools Dentrix provides you. A payment agreement likely shouldn't be your default choice, but it can be a very powerful and helpful tool for you and a few select patients. **DM**

LEARN MORE

To learn more about payment agreements, see the following topics in the Dentrix Help: Setting up a payment agreement, Payment agreements. You can also visit the Dentrix Resource Center to view these on-demand webinar recordings: Collections Management, Treatment Manager, and Collections Manager. See "How to Learn More" on page 7 for instructions on accessing these resources.

Keeping Questionnaires Up to Date with Productivity Pack 8

The new Questionnaires features in Dentrix G4 Productivity Pack 8 make it even easier for you to keep forms up to date and collect important information from patients.

■ **Erin Brisk** | Senior Editor

Dentrix makes the process of filling out patient forms easy for you and your patients. You can set up a kiosk in your waiting room or hand patients an iPad or tablet PC with the kiosk software and allow them to fill out their forms electronically. You can even post questionnaire forms online so patients can fill them out before they arrive for their appointments.

The electronic data that patients enter in a kiosk or on the Web is imported directly into the Dentrix Questionnaires module, so you don't have to spend time manually entering information from patient forms. It's easy to manage patient forms with the Questionnaires module.

Dentrix G4 Productivity Pack 8 makes it even easier for you to keep forms up to date and collect important information from patients.

Setting An Expiration Date On Questionnaire Forms

You need to have current patient information—like addresses and insurance information—so that you don't send important patient communications to an old address or bill the wrong insurance company for a patient's treatment. With Productivity Pack 8, you can set an expiration interval for forms. Then, when a form has expired, the expiration date for the form will turn red in the Questionnaires module, signifying that the patient needs to review the form and update any information that has changed.

To set an expiration date for a form, open the Questionnaires module. From the **Edit** menu, click **Questionnaire Setup**. The **Questionnaire Setup** dialog box appears (Figure 1). Select the form that needs to expire on a regular interval and click the **Set Expiration** button. The **Set Expiration for Responses** dialog box appears (Figure 2). Select the **Expire**
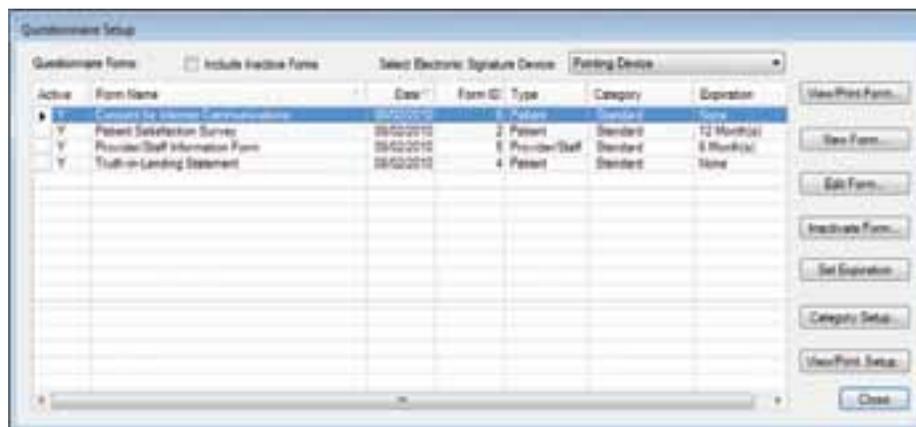

Figure 1 The Questionnaires Setup dialog box allows you to view form information, create new forms, edit existing forms, and set form expiration dates.

every [ ] month(s) option and set the interval for when the form should expire after a patient fills it out. **Note:** You can also set the expiration interval when you create new forms in the **Questionnaire Form Setup** dialog box.

If you are posting forms on the Web for patients to fill out, forms that have expired will show the expiration date next to the name of the form. If you have a kiosk in your office, or you are allowing patients to check in with the kiosk software on an iPad or tablet PC, only the forms that have expired or that have never been filled out will be available for patients to fill out.

Requiring Responses To Questions

Often, patients are in a hurry when they fill out their forms. Consequently, they may miss questions and not give your office important information. With Productivity Pack 8, you can require a response for a specific question on a form. The question will be marked with a red asterisk on the form, and the patient won't be allowed to complete the form without answering the required question(s).
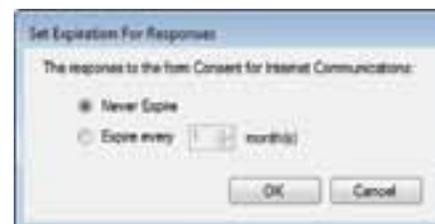

Figure 2 You can set forms to expire as often as you think patients need to review and update the information.

To mark a question as required, in the Questionnaires module. From the **Edit** menu, click **Questionnaire Setup**. The **Questionnaire Setup** dialog box appears (Figure 1). Select the form that includes questions you want to mark as required and click **Edit Form**. The **Questionnaire Form Setup** dialog box appears (Figure 3). Find the appropriate question in the **Form Questions** pane and select the check box in the **Req** column to make that question required. Non-question items (like header text, body text, blank lines, separators, and page breaks) cannot be marked as
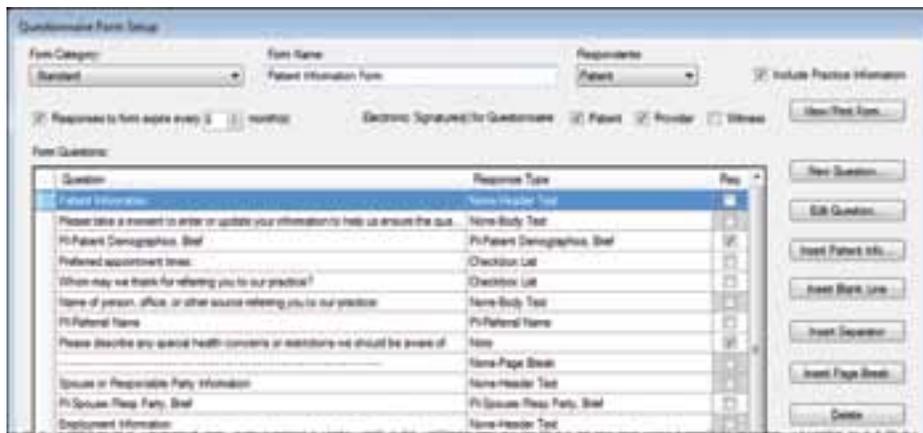
Figure 3 The Questionnaire Form Setup dialog box allows you to set up new forms, edit existing forms, and mark questions as required.

Figure 5 The Questionnaire Form Setup dialog box allows you to set up new forms, edit existing forms, and mark questions as required.

Figure 4 You must check the Use Note to Update Patient Information check box for each note response question in order to copy patient note responses into Dentrix.
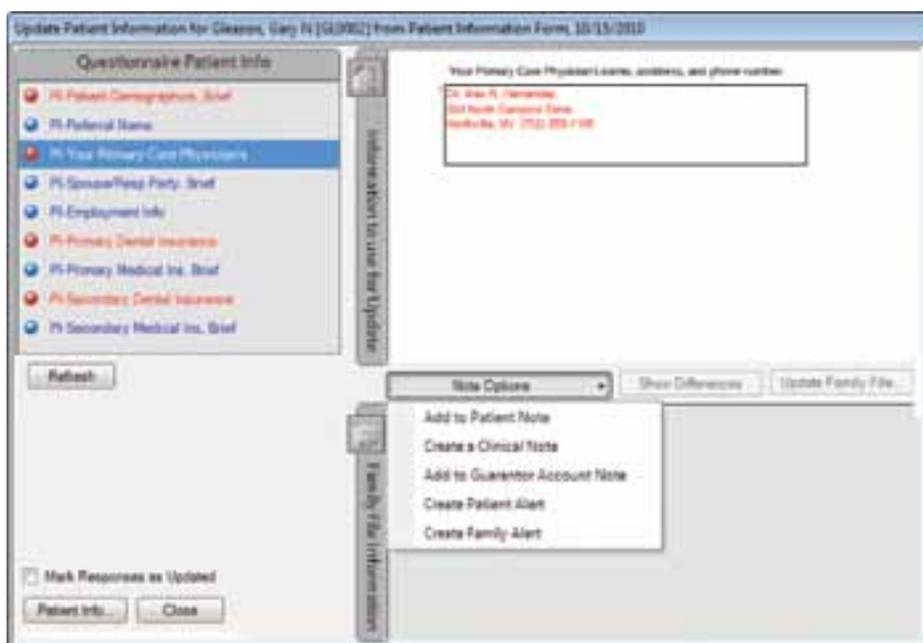
Note: for existing questionnaire forms, you must edit the form and check the Use **Note to Update Patient Information** check box for each note response you want to be able to add to Dentrix.

After a patient fills out the form with the note response, you can add the note to Dentrix using the Update Patient Information Feature. In the Questionnaires module, select the patient and click the **With Responses Tab**. Select the form that includes the note field you want to add to Dentrix and click **Update Patient Information**.

In the Update Patient Information dialog box (Figure 5), select the note question. In the **Note Options** field, select the place in Dentrix where you want to copy the note text. The text of the question and the note will be copied and entered into the Dentrix note field you select, and that note field will be opened so you can edit the note, if necessary. **DM**

LEARN MORE

To learn more about the Questionnaires module and Dentrix G4 Productivity Pack 8, see these topics in the Dentrix Help: What's new in Productivity Pack 8, Questionnaires Overview, Setting up Questionnaires. You can also visit the Dentrix Resource Center to view these on-demand training titles: Dentrix G4 Productivity Pack 8, Using the Questionnaires Module. See "How to Learn More" on page 7 for instructions on accessing these resources.

required, so the Req option for those items is grayed out. Note: You can also select the **Require response for this field** check box in the **Question Setup** dialog box to mark a question as required.

Updating Patient Information From Questionnaire Form Responses

Patients often enter important information and explanations in the note fields on forms. Previously, the only place you could see those notes was in the actual form in the Questionnaires module. With Productivity Pack 8, you can capture those responses and add them to specific note fields in Dentrix without manually retyping the note.

To set up this feature, in the Questionnaires module. From the **Edit** menu, click **Questionnaire Setup**. The **Questionnaire Setup** dialog box appears (Figure 1). Select the form to which you want to add note fields that can be imported into Dentrix and click **Edit Form**. The **Questionnaire Form Setup** dialog box appears (Figure 3). Click **New Question**. The **Question Setup** dialog box appears (Figure 4). In the **Question Setup** dialog box, select **Note Response** in the **Response Type** pane. Enter the question you want patients to answer in the note field. Select the **Use Note to Update Patient Information** check box.

Three Keys for Using Your Practice Management Software to Increase Productivity

Learning to use your practice management software is essential, and what you do with that knowledge will determine your rate of success.

■ **Lois Banta** | CEO of Banta Consulting, Inc.

It has long been said that most dental practices utilize their practice management software at about ten percent of its capability. One of the most common mistakes dentists make is investing thousands of dollars in new dental software without investing in sufficient training. You wouldn't buy a new car without knowing how to drive it, would you? Learning to use your practice management software is essential. Here are three keys for using your software to increase your practice's productivity.

Accurate Data Entry

Entering data properly affects many areas of the practice, creating an environment for successful practice management. When a new patient calls the office for the first time, data must be collected to identify and treat his or her individual dental needs. Once this information is obtained, an appointment can be made. The data entered becomes a tracking tool to determine successes in diagnosis and treatment acceptance.

Regular Reporting

There are numerous statistics that should be tracked daily, weekly and monthly to determine the success of your efforts. Typically, this is called a monthly monitor report. There are several reports available in your own software that can assist you in tracking numbers to improve your productivity (see sidebar). Below I have listed some of the crucial reports.

• **Accounts Receivable Aging Report:** It is vital to understand how many dollars are outstanding in current, 30, 60 and over 90 day accounts. For each month an account ages beyond 90 days, the practice loses approximately 7%. The costs for tracking and collecting old balances can far exceed the actual value of the account itself! Run this report monthly.

• **Outstanding Insurance Claims Report:** Use this report to identify how many dollars in outstanding claims there are in each category (current, 30, 60 and over 90 days). This report is crucial because the longer dollars remain outstanding in claims, the more costly it is to the practice. Run this report monthly.

• **Accountant Earnings Report** (adjustment report)**:** This report is important because it details exactly how many dollars are being written off in each category, for example, accounting adjustments, insurance plan adjustments, professional courtesies, prepayment courtesies, etc. Monitor this report daily and monthly.

• **Production by Provider:** This report allows you to track individual provider production for each dentist and hygienist. It is important to track individual production numbers to determine productivity. Typically, hygiene production (in a general dental practice) should produce approximately 30% of the total production in an office. However, if doctor exams are not included, the number will tend to be lower.

• **Production by Code:** This report gives you an opportunity to track the number of times a specific procedure is done. Tracking how many times each procedure is performed is a great tool to determine how many should be pre-blocked in the future. Also, tracking how many are performed can be used as a tool to determine productivity, verbal skills, treatment acceptance rates and much more. If the practice is utilizing special techniques, tracking the production by code will help to determine effectiveness.

• **Treatment Plan Report:** This report identifies how many dollars of treatment are being presented to patients. Utilizing this report effectively can identify your success rate in treatment acceptance. The formula for your treatment acceptance rate is: Dollars Recommended divided by Dollars Accepted. Your case acceptance rate should be at least 85%. Any percentage below this identifies an area to pay close attention to.

Flexible Patient Financing

It has long been known that money in the bank is better than money on your books. There are some software systems now with built-in technology for patient financing. Utilizing this valuable tool is important because it is one of the main things that help patients afford necessary dental care.

In order to avoid becoming the bank, systems must be in place to handle this sometimes challenging dilemma. For example, with PowerPay you can set up automatic, recurring payments from a patient's credit or debit card. Of course, collecting the fee at the time of service is still the best collection technique. However, there are many patients living paycheck to paycheck who don't have thousands of dollars in the bank account. Having a system in place for patient financing expands the opportunity for valued patients to say "yes" to necessary dentistry.

Some software systems have a special icon directly on the software

system main toolbar which eases the application process of patient financing. For example, Dentrix provides a Patient Financing button which links to an online application for the Citi Health Card, and Dentrix automatically fills out the application with the patient's information. Pre-approval techniques tied directly to the Internet can pre-qualify a patient for financing which can decrease the sometimes awkward conversation that can occur when patients are unable to pay the entire fee up-front.

Remember, your practice management software will become the albatross around your neck unless you understand how to use it. Proper training is the solution to many of the production challenges that happen in the dental office. Knowledge is a powerful tool. More importantly, what you do with that knowledge can determine your rate of success. **DM**

Lois Banta is founder and CEO of Banta Consulting, Inc. established in 2000 and the new owner and CEO of The Speaking Consulting Network. To contact Lois for a personal consultation, or to invite Lois to speak to your organization, call 816-847-2055, send email to lois@bantaconsulting.com or visit www.bantaconsulting.com.

Where to Find the Numbers in Dentrix

Dental practices should monitor the statistics listed below to improve productivity. Follow these instructions to find the numbers in the Dentrix Office Manager.

- Accounts Receivable Aging: From the **Reports** menu, point to **Ledger** and then click **Aging Report.**

- Outstanding Insurance Claims: From the **Reports** menu, point to **Ledger** and then click **Insurance Aging Report**. (To improve claim tracking, use eClaims to submit electronic claims and then track them in real-time with the eCentral Insurance Manager.)

- Adjustments: For daily details, from the **Reports** menu, point to **Management**, click **Day Sheet (Charges and Receipts)** and then check **Adjustment Only Day Sheet**. For a monthly summary, from the **Reports** menu, point to **Management**, click **Practice Analysis Reports** and then check **Adjustment Summary**.

- Production by Provider: From the **Analysis** menu, click **Practice Advisor**. In the Practice Advisor dialog box, click **Practice Advisor Report**. Check **Include Dentist Detail** and **Include Hygienist Detail**.

- Production by Code: From the **Reports** menu, point to **Management**, click **Practice Analysis Reports** and then check **By Proc Code Range**.

- Treatment Plan Acceptance: From the **Analysis** menu, click **Practice Advisor**. In the Practice Advisor dialog box, click **Practice Advisor Report**. Check **Include Dentist Detail** and **Include Hygienist Detail**.

For detailed instructions on running these reports, see the Dentrix Help. From the **Help** menu, click **Contents**, click **Search** and then type the name of the report in the search field.

Wallach Dental Personalizes Service while Cutting Costs with Dentrix

Wallach Dental uses Dentrix and its integrated eServices to streamline workflow so the team can focus their time on treating patients.

Dentrix Helps Teams Deliver More Personalized Service

Wallach Dental takes pride in delivering the highest quality in patient care. And not surprising, their Dentrix practice management system plays a large role in helping them provide this service. While the team relies on Dentrix to automate tasks and improve their productivity, the greatest value of Dentrix is its ability to free up the team's time to focus on delivering personalized service.

"Building relationships is important in my practice," says Dr. Marc Wallach. "I want to establish good relationships with the people I treat. But a lot of what occurs in a dental office has to do with information: gathering, importing, and using it. Dentrix lets us address all of these information needs quickly, easily,

> With Dentrix, we don't spend as much time and energy on paperwork like other dental practices do, letting me and my staff interact with our patients on a more personal level.

and accurately, providing us huge time savings," Wallach says. "What that means is, with Dentrix we don't spend as much time and energy on paperwork like other dental practices do, letting me and my staff interact with our patients on a more personal level," Wallach explains.

Dentrix eServices Increases Practice Efficiency

Much of the time savings Wallach Dental enjoys comes from various Dentrix eServices, which automate mundane and repetitive tasks. For example, Dentrix QuickBill easily takes care of all of the practice's patient billing. "I don't want my staff wasting time printing statements, folding them, stuffing them in envelopes, and mailing them out to patients,"

Dr. Wallach says. "I want them up front talking to patients and finding out what's going on in their lives. I want them to build relationships with people."

Designed to integrate seamlessly with Dentrix, eServices is a suite of products from Henry Schein Practice Solutions that automates time-consuming front-office tasks. Using eServices, staff can submit insurance claims, process payments, and enter patient data in seconds. Completing non-treatment-related tasks is faster and easier with eServices, so the dental team can concentrate more on patients and on providing outstanding dental care. eServices also reduces paperwork while boosting productivity and profitability.

Another eService Wallach Dental uses is Dentrix eCentral, which automates and

simplifies a variety of time-consuming tasks. eCentral verifies insurance eligibility, tracks insurance claims, manages appointments, emails appointment reminders, sends and receives provider referrals, and more. The practice also uses eCentral to create and host its integrated website, allowing patients to access their accounts, check their balances, and pay bills online.

Dentrix eCentral has also helped reduce no-shows. "Since we've been using Dentrix for appointment reminders and confirmations, more than 90 percent of our patients who confirm their appointment will show up for their appointment," Dr. Wallach says. "The email reminders save my staff from having to spend so much time calling people to remind them."

When patients confirm appointments, Dentrix also provides a link to the Wallach Dental website, where they can look at their current patient information and update it as necessary. Not only does this save the patient time, it also ensures

that Wallach Dental always has the most up-to-date patient information. For patients who choose not to update their information during appointment confirmation, Wallach Dental also provides an electronic kiosk in the office waiting room for that purpose.

"The online forms Dentrix provides are a big time saver," Dr. Wallach says. "It saves our patients time, and it saves my staff time. It also gives me the opportunity to review patients' information before they even get to my office. That lets me be better prepared. So when I'm walking into the room, instead of flipping through pieces of paper trying to integrate the patient information in my mind, I already have my game plan and know what I need to do. That's a huge advantage. Dentrix eServices also allows my staff to have more personal experiences with the patients," Dr. Wallach adds. "Instead of our office manager having to collect patient histories, search through papers, check on insurance, and other mundane tasks, she can engage with patients. She now has time to ask about family,

vacations they're planning, and those kinds of things that really matter."

Wallach Dental Cuts Expenses

The efficiencies and time savings that Wallach Dental has realized with Dentrix have also played a key role in enabling the practice to continue to run as a successful business, even during troubled economic times. "Over the years as I've seen other practices grow their business, they often increase their number of employees and overhead," Dr. Wallach says. "Even though they produced a lot, overhead became so large their bottom line actually began to shrink. And when the economy went down, they had to lay off people and cut back in a variety of different ways. But we didn't. We positioned our office size correctly, so we haven't had to let anybody go."

Dr. Wallach's philosophy has been to employ a smaller staff but work more efficiently. "I felt that if I could get the right group of people and embrace the right technologies, I'd be able to achieve the efficiencies to maintain a small core

group, be very productive, and enjoy a profitable bottom line," he says. "But to be able to follow that kind of philosophy, you have to embrace technologies like Dentrix." Dr. Wallach also indicates that the increased efficiency from using Dentrix has significantly reduced his overall overhead.

"Henry Schein Practice Solutions is a great company, and Dentrix is a great solution," Dr. Wallach says. "Dentrix helps dental offices work better, and the company has a good feel for the future of dentistry. They enable me and the rest of my staff to work in a more efficient manner. Dentrix helps me provide the best dentistry I can offer, establish patient relationships that really matter, and do it all in a productive and profitable way." **DM**

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