

dentrix

MAGAZINE

Creating an Exceptional New Patient Experience

Turn a new patient into a lifelong patient, page 10



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Year-End Profits**

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Harvest Time

FROM THE EDITOR

A few days ago, as I walked out my front door, I was surprised by an unexpected change in temperature. The air was cooler, a welcome relief after a summer of record high temperatures. The refreshing change made me think about the onset of fall, the season when the harvest begins for many farmers and the back-to-school harvest ends for many dentists. Yet the most productive practices have learned to extend the harvest, to reap in August, September, and throughout the fall season.

To help your practice reap the best possible harvest this fall, this issue of *Dentrrix Magazine* includes several articles that provide suggestions to maximize production and collection with Dentrrix. In her article, "Act Now to Boost Year-End Profits" (page 16), contributing editor Erin Brisk explains how you can use Dentrrix to identify and contact patients who have treatment plans and remaining insurance benefits. Practice administrator and consultant Jill Nesbitt shares proven strategies to collect overdue accounts (page 24). And, because you will almost certainly receive visits from new patients this fall, authors Jim Philhower and May Wescott recommend customer service tactics and Dentrrix tips to create an exceptional new patient experience (page 10).

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

Regards,

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COVER STORY: CREATING AN EXCEPTIONAL NEW PATIENT EXPERIENCE

Excellent customer service can turn a new patient into a lifelong patient. Learn how you can use your Dentrix software to create an exceptional new patient experience.



Let Dentrix help you find patients with outstanding treatment and remaining insurance benefits so you can get them scheduled before the end of the year.

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HOW TO LEARN MORE

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

Dentrix Help Files

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

Dentrix Resource Center

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

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▼ New Insurance Carrier Connections

DENTRIX® eClaims

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

PAYOR ID	PAYOR NAME
36659	United Food & Comm Workers Unions & Employers Midwest Health Benefits Funds
37118	Benefit Plan Administrators of VA
38194	Group Health Managers (EHC Central)
75068	Assurant Health Self-Funded
86066	Hawaii Mainland Administrators
93842	Securian
CX111	UFCW Local 655
HTD99	Health Tradition—MMSI
IDIND	Delta Dental of Illinois Individual Plan
LAHF1	Local 17 Fund – International Assoc. of Heat & Frost Insulators
TFQ67	Samba Federal Employee Benefit Assoc.
TLU02	Administration Systems Research Corporation
TLU02	ASR Health Benefits
TLU02	Physicians Care
TLU02	Physicians Care Health Plus
TLU02	Physicians Care Network (MI)
TLX17	FirstCare Health/FirstCare Administration Services
TLX92	ACMG of South Carolina
TPC05	Sanford Health Plan of MN

DENTRIX® Attachments

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

PAYOR ID	PAYOR NAME
53287	Blue Cross Blue Shield of Delaware
93200	Regence BlueCross BlueShield of WA
CB850	Regence BlueCross BlueShield of OR
CBID2	Regence BlueShield of Idaho
CX091	MCNA Dental Plans
DDPHS	Delta Dental Public Health Services ADDP
TLU43	Regence BCBS of Utah

DENTRIX® eEOB

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

PAYOR ID	PAYOR NAME
23281	UPMC Health Plan
38217	Priority Health
59297	Employers Mutual
59332	WEB-TPA
71063	HealthSCOPE Benefits
71412	Mutual of Omaha Insurance Company
75261	Community Health Electronic Claims
75261	CHEC
75261	WEB-TPA
CKKS1	Medicaid of Kansas

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

DENTRIX

INSIGHT SEMINAR

Join us for a half-day seminar on Dentrix tips and tricks to help you and your practice achieve new levels of productivity.

Dentrix experts will teach you tips and tricks to:

- Prevent overdue recall and unscheduled treatment
- Reduce no-shows and keep your chairs full
- Improve and streamline the patient billing process
- Simplify and automate insurance billing and claim tracking

You will also discover features that help you to:

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

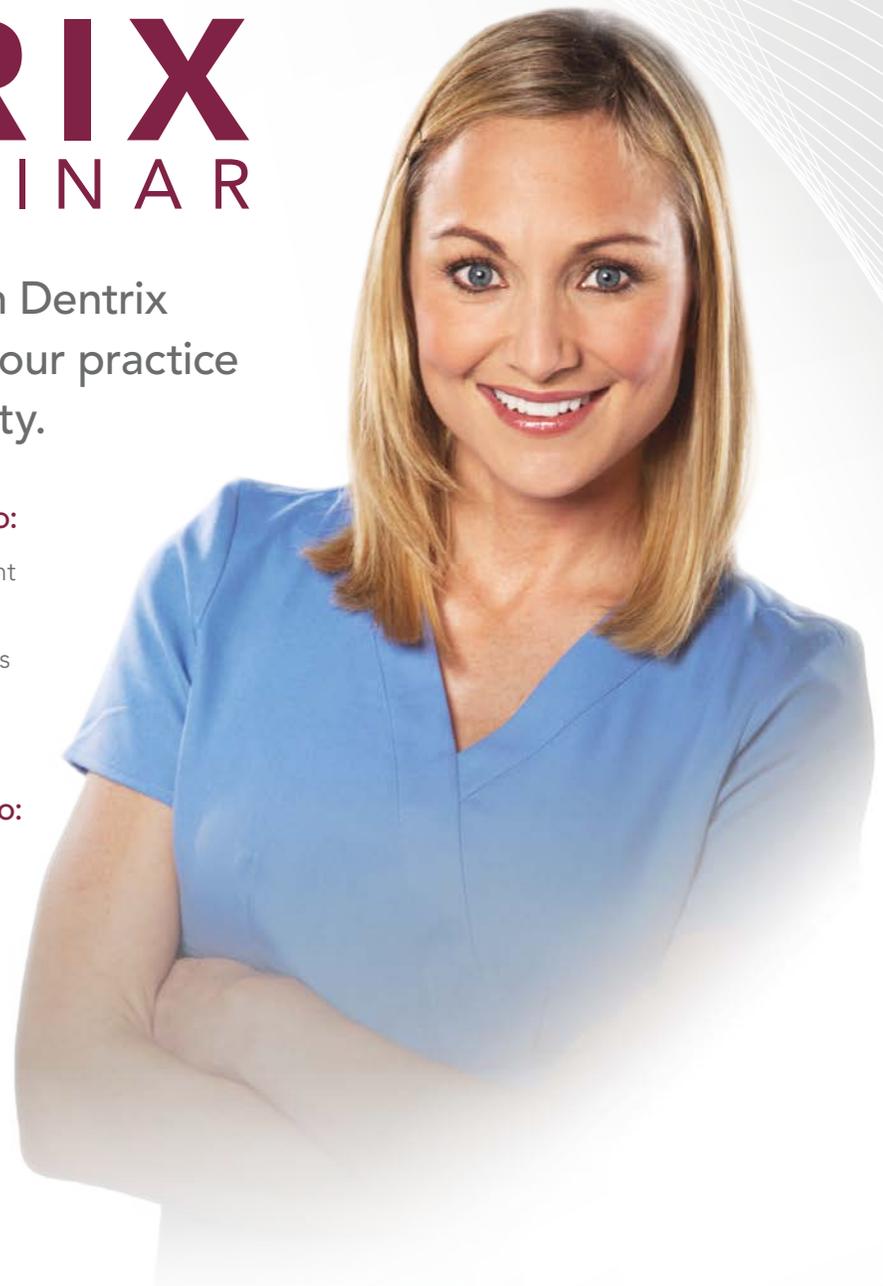
Who should attend:

Doctors, office managers, dental assistants and other front office team members who need to learn more about using Dentrix and eServices to improve productivity.

Insight Seminars offer quick, high-level tip and tricks

Join us for a morning seminar, enjoy breakfast and gain valuable insights on improving your productivity. You'll also receive a Dentrix Insight Kit with step-by-step guides for applying what you learned when you return to the office that afternoon.

Note: CE credits are not offered as part of the Insight Seminar training. For advanced, hands-on training using a computer we recommend you attend a workshop. Visit www.Dentrix.com/Workshops



- 9:00 a.m. to 1:00 p.m.
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- Free parking
- To see the full agenda, visit www.Dentrix.com/InsightSeminar

Space Is Limited. Register Today!

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Tips & Tricks

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

Billing & A/R

Date	Name	Tooth Code	Description	Amount	Prov	Ins
12/01/2009	Marina Hiland	Fn	*Finance Charge	9.42	DDS1	
01/01/2010	Marina Hiland	Fn	*Finance Charge	9.56	DDS1	
01/07/2010	Marina Hiland	Pay	*Insurance Payment	-92.00	HYG1	
01/07/2010	Marina Hiland	Ins	*Pr Dental Claim - Rec'd 92.00			564.62
01/13/2010	Marina Hiland	D0274	*Biweekly-four films	41.00	HYG1	605.62
01/13/2010	Marina Hiland	D0120	*Periodic oral evaluation	31.00	HYG1	636.62
01/13/2010	Marina Hiland	D1110	*Prophylaxis-adult	61.00	HYG1	697.62
01/27/2010	Marina Hiland	9 D3310	*Root canal therapy - anterior	444.00	END0	1141.62
02/01/2010	Marina Hiland	Fn	*Finance Charge	8.47	DDS1	1150.09
02/10/2010	Marina Hiland	9 D2750	*Crown post. Use high noble mtl	749.00	DDS1	1899.09
03/02/2010	Marina Hiland	Fn	*Finance Charge	17.12	DDS1	1916.21
04/01/2010	Marina Hiland	Fn	*Finance Charge	28.49	DDS1	1944.70
05/03/2010	Marina Hiland	Fn	*Finance Charge	29.17	DDS1	1973.87
05/07/2010	Marina Hiland	Pay	*Insurance Payment	-133.00	HYG1	1840.87
05/07/2010	Marina Hiland	Pay	*Insurance Payment	-365.70	END0	1485.17
05/07/2010	Marina Hiland	Pay	*Insurance Payment	-374.50	DDS1	1111.17
05/07/2010	Marina Hiland	Ins	*Pr Dental Claim - Rec'd 133.00			1111.17
05/07/2010	Marina Hiland	Ins	*Pr Dental Claim - Rec'd 444.00			1111.17
05/07/2010	Marina Hiland	Ins	*Pr Dental Claim - Rec'd 749.00			1111.17

Showing Transaction Links

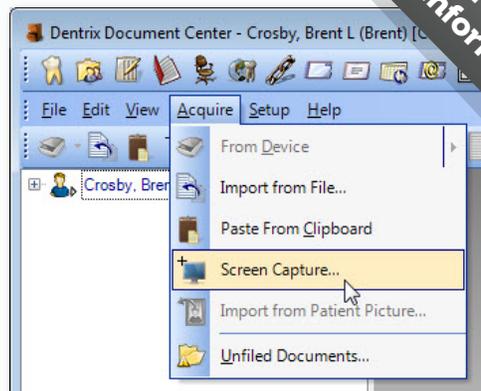
Using the Show Transactions Links tool you can quickly identify every transaction linked to an insurance claim. With **Show Transactions Links** activated for a claim, Dentrix highlights the claim, procedures, payments, and adjustments (if any) associated with it in the Ledger transaction log. To view the transaction links for an insurance claim:

1. Select a claim from a patient's Ledger.
2. Click the **View** menu and select **Show**

Transaction Links.

Dentrix highlights every transaction entry that is linked to the one you selected. This can really help you make sense of a potentially confusing Ledger full of entries.

Patient Information



Screen Capture Tool

Dentrix G5 includes a screen capture feature that allows you to capture any image on your computer screen, including graphics, images from third-party software, X-rays, perio charts, and Web pages. These images can be stored directly in a patient's Document Center.

To use the Screen Capture feature:

1. From the Document Center toolbar, select **Acquire > Screen Capture**.
2. From the **Screen Capture** dialog box, select **Start Capture**. The mouse icon changes from an arrow to a cross-hair icon.
3. Click and drag over the area of the screen you want to import into the Document Center. When you release the mouse, the image is automatically stored in the patient's Document Center.

For more information about using the **Screen Capture** feature, log in to the Dentrix Resource Center and view knowledgebase article #61031. Expand the Dentrix G5 option, and view the short video titled "Dentrix G5 New Features."

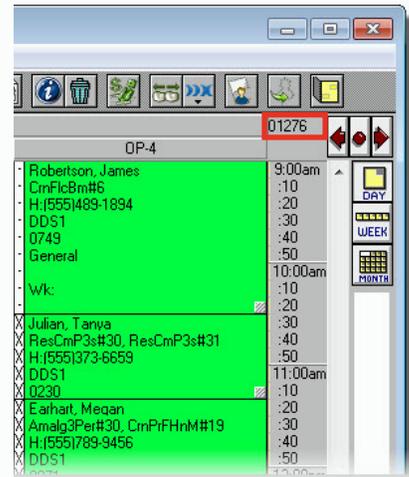
Viewing Daily Production Amounts

If you're setting daily production goals or you just want to see how productive your day is going to be, try viewing the **Scheduled Production Amount** in the Appointment Book. With this feature enabled, you can view your scheduled production amount just by glancing at the Appointment Book. It's displayed in the top-right corner of the Appointment Book next to the **Previous**, **Today**, and **Next** buttons.

To enable this feature:

1. From the Appointment Book menu, click **View**.
2. Select the view you're using and click **Edit**. The **Select View** dialog box appears.
3. Check the **View Amount** option and click **OK**.
4. Repeat for any other views in which you want to see scheduled production amounts.

Note: Dentrax rounds production amounts to the nearest dollar and camouflages them by adding a zero in front of the amount, making it less likely that patients will associate the number with revenue.



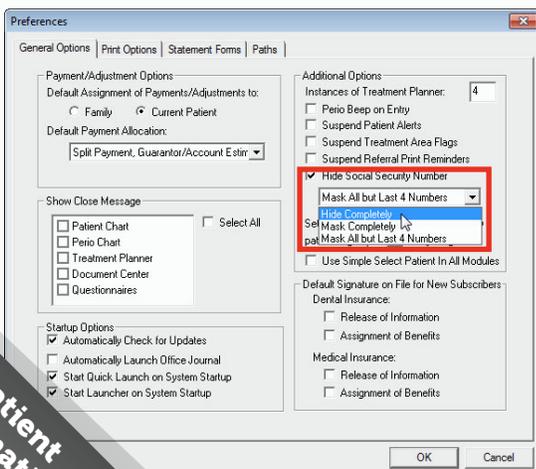
Appointments

Hiding Social Security Numbers

Did you know you have options about how Social Security numbers are displayed in Dentrax? With identity theft on the rise, many people worry about where their Social Security number might show up. Choosing one of these options can help your office keep sensitive information safe.

1. In the Office Manager, go to **Maintenance > Practice Setup > Preferences** and open the **General Options** tab.
2. Under **Additional Options**, select **Hide Social Security Number**. Then choose an option from the drop-down list as to how the number will be hidden:
 - **Hide Completely** - Removes the number from view (the field appears blank)
 - **Mask Completely** - Replaces the digits of the number with the “#” symbol
 - **Mask All but Last 4 Numbers** - Replaces the first five digits with the “#” symbol but displays the last four digits

Note: You will still be able to view the Social Security number from the **Patient Information** dialog box in the Family File and the **Update Patient Information** dialog box in the Questionnaires module.



Patient Information

Changing Providers for Selected Procedures

When an appointment is set complete from the Appointment Book, the procedures are assigned to the appointment provider. However, in some cases (like hygiene appointments) the procedures should be posted to multiple providers. You can quickly change the provider for a completed procedure by following these steps:

1. Open the Patient Chart and select the patient.
2. In the **Progress Notes** panel, select the completed procedure(s) that should be posted to a different provider.
3. Click the **Change Provider for Selected Procedures** button. The **Select Provider** dialog box appears.
4. Select the correct provider for the procedure(s) and click **OK**. The provider is changed for all highlighted procedures.

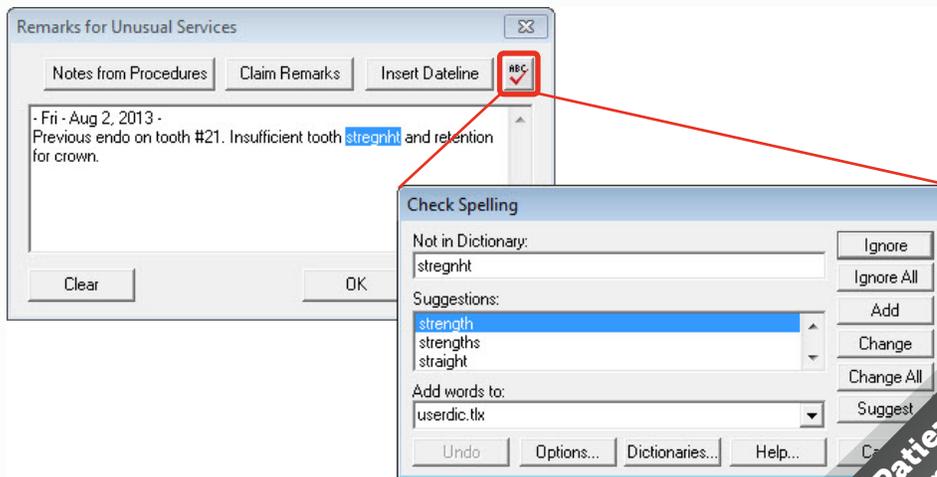
By changing the procedures assigned provider from the Chart, you can change multiple procedures at the same time, saving you time, and your patient records will more accurately reflect the patient's care.



Charting

How do you spell "anesthesia"?

Did you know that all editable note fields in Dentrix include a spell check option? Be sure to use this feature so that your notes are free from misspelled words, making them more accurate and professional. Simply enter the text of your note in the field provided, and click the **Check Spelling** button. The **Check Spelling** dialog box opens and works just like any standard spell-check tool. It's quick and easy to use!



Patient Information

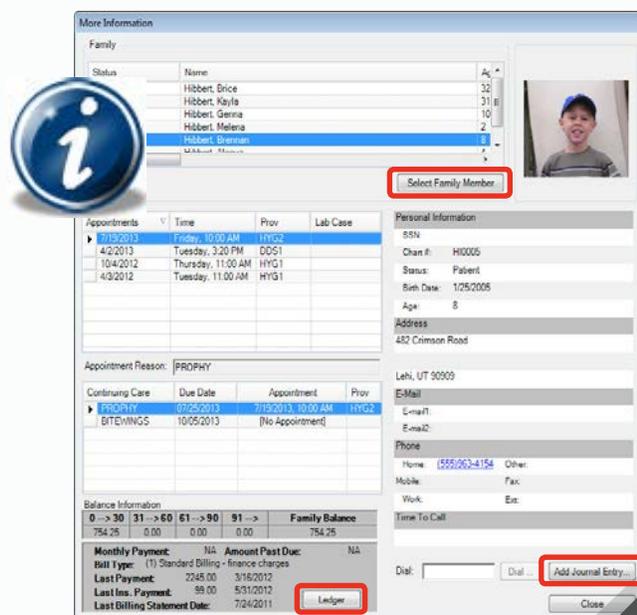
More Information Button

One of the often overlooked but highly useful features in Dentrix is the **More Information** window.

The **More Information** window displays summary patient information, including patient contact information, family members, appointment history, continuing care due dates, and balance information. You can also access the patient's Ledger and add an Office Journal entry from within this window. If you click on any of the patient's family members, you can switch views to see the summary information for the selected family member.

You can access the **More Information** window from all patient-specific modules, as well as from the Lab Case Manager, Treatment Manager, and Collections Manager. Simply click the **More Information** button to get started using this great feature.

For more information about how to use this option, see the "Viewing More Patient Information" topic in the Dentrix Help.



Patient Information



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Creating an Exceptional New Patient Experience

Jim Philhower, Director of Dental Leadership & Development
May Wescott, Senior Editor

Can you remember the last time you had an exceptional customer service experience? How about a truly awful one? Recently, a friend shared her best and worst customer service experiences, which both happened at the same hotel chain. On her first visit to the hotel, she was deeply impressed by the quality of service she received. She was so pleased with how she was treated that she specifically chose that hotel for her honeymoon, and she returns each year on her anniversary. In fact, that first impression was so powerful that even when she had an awful experience a couple of years ago, the hotel kept her business.

That's the kind of customer service you want patients who are new to your practice to experience. You want to provide an encounter that is so positive it will keep them coming back for years. While it's not easy to provide that kind of top-notch first impression, with a little bit of planning and some help from your Dentrix software, you can create an exceptional new patient experience in your office.

The First Visit Appointment Call

The most important thing you need to communicate to a new patient is that you want to see them. Too often we unintentionally communicate to a potential client that we've got to attend to other, more important patients. We put them on hold, we tell them we can't schedule them for weeks, or we hurry them through that initial phone call without making them feel welcome. Does this sound familiar? If it does, then you need to make some changes in your new patient handling, immediately!

Start by making it a priority to schedule new patients. A recent study revealed that by scheduling a patient within 48 hours of the initial contact, you dramatically increase your show-up rates and your new patient production. Yet, almost 75 percent of dental offices are unable to schedule a new patient appointment within that 48 hour window.¹ Take advantage of what other practices are not doing for new patients by reserving time in your schedule to see new clients.

Dentrix makes this easy by allowing you to set up provider time blocks. Time blocks allow you to reserve specific times in the Appointment Book for certain appointment types, such as new patient exams. Once you have set up and activated a new patient time block, you will see

To create a new patient time block, open the Appointment Book. From the **Setup** menu, click **Provider Setup**. Choose your new patient provider and click **Setup**. Click **Add** to create a new time block. Assign a name, operatory, and date(s) and time(s) to the block, and select the type of appointment

Make a Personal Connection

During the initial phone call, make sure to gather some personal details about the patient. Document this information in the patient's appointment note by double-clicking on the new patient appointment and typing the details in the **Notes** field (Figure 2). On the morning of the appointment, these notes will show up on your Daily Huddle report so that you can review them in your morning staff meeting.

When the patient arrives, refer to the notes so you can personalize your connection with the new patient. You can say things like, "So, I noticed that you were referred by Jane Deacon. How do you know Jane?" or "I heard that you moved here from Cincinnati, what brought you here?" By taking the time to gather, review, and talk about these personal details with new patients, you emphasize that you are interested in them for more than just their business.

The VIP Phone Call

Nothing will make a patient feel more valued than receiving a personal greeting from their "new" doctor even before they arrive. Make it a part of your new patient experience for the doctor to call potential patients two days before their first visit. The call doesn't have to be long, but it should give the doctor the opportunity to thank the patient for choosing your office and to ask if the patient has any specific concerns or questions before the scheduled appointment. This simple phone call serves to remind the patient about the appointment while also making the patient feel like the Very Important Patient they are.

You can simplify the process of making these phone calls by creating a new patient phone call list for your doctor in the **Office Journal**. To add a call to the list, open the **Office Manager**, and then click the **Office Journal** button. Since you're opening the **Office Journal** from the **Office Manager**, you'll be prompted to choose a staff member. Select the doctor's provider ID and click **OK**. Then, from the **Office Journal**, click **Add Journal Entry**. Select **Reminder** as the **Type**

Excellent customer service can turn a new patient into a lifelong patient.

a colored border surrounding the blocked time, which contains the time block name and the provider assigned to that block (Figure 1). If you attempt to schedule another type of appointment during the reserved new patient time, Dentrix warns you with a message.

that is allowed to be scheduled during that time. Click **OK** to save your settings and return to the Appointment Book. (If the new patient block doesn't show up immediately, try clicking the **Perfect Day Scheduling** button on the Appointment Book toolbar.)

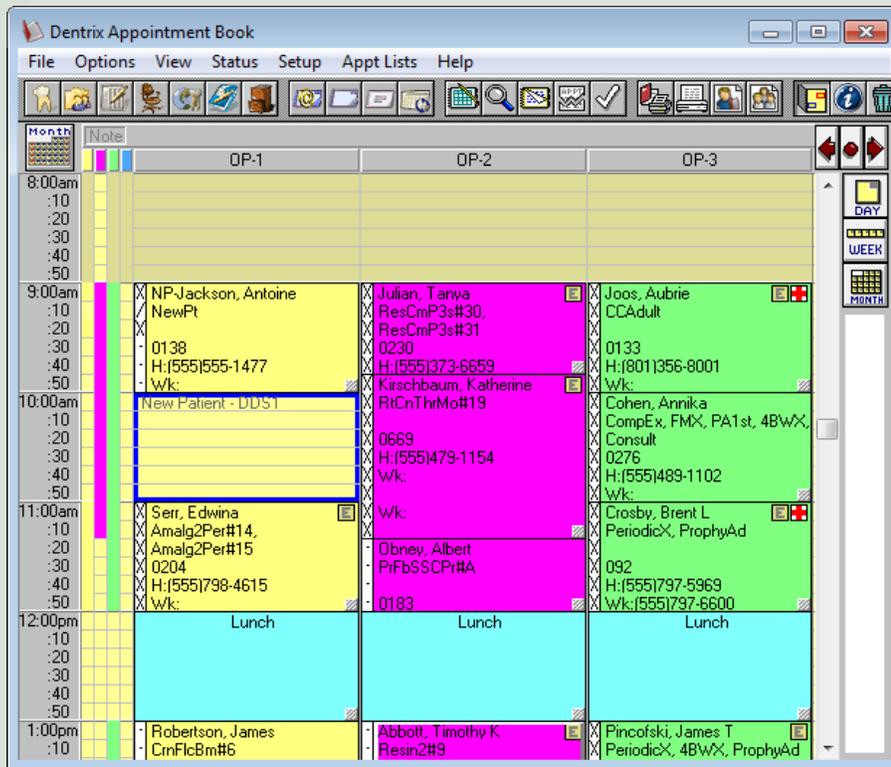


Figure 1 Time blocks allow you to reserve specific times in the Appointment Book for new patient exams.

¹ The Changing Role of the Dental Office Manager. AADOM. 2012 Annual report. http://www.dds1800.com/whitepapers/The_Changing_Role_of_the_Dental_Office_Manager/. Accessed on 4/5/2013.)

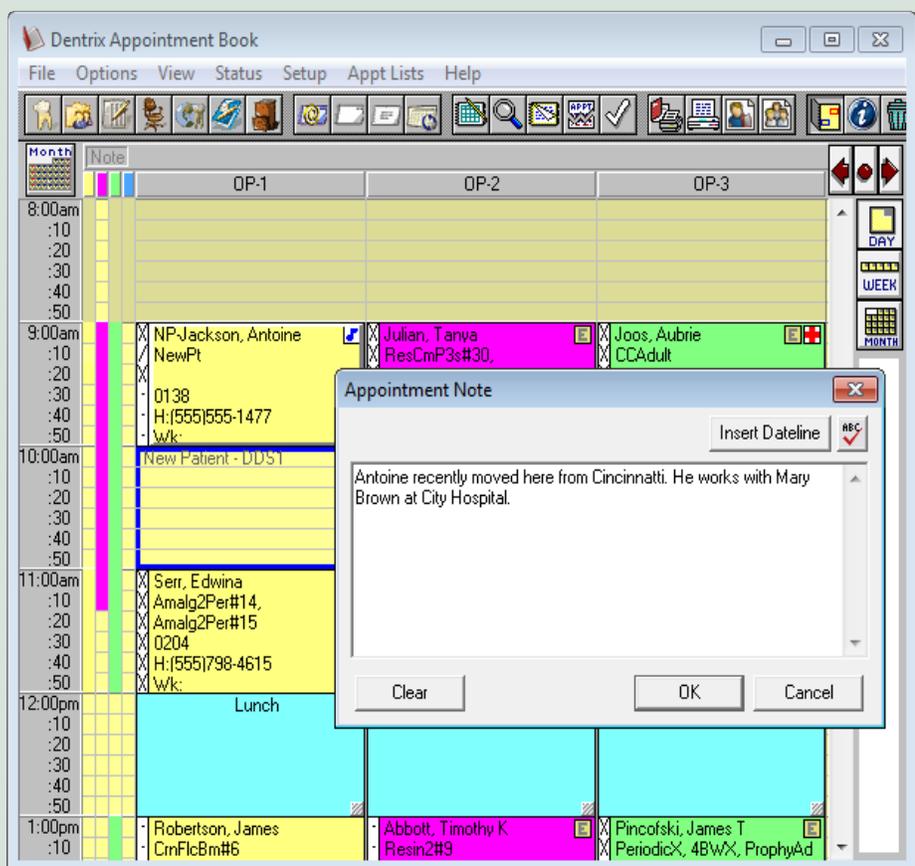


Figure 2 Appointment Notes can help to make personal connections with patients by reminding you of personal details.

annoying business behavior. In fact, according to service industry research, 76 percent of customers believe waiting longer than 5 – 10 minutes is unreasonable. Forty-eight percent of customers surveyed said that long wait times indicate that a business is “not well run or badly managed.”²

Yet, many dental offices think nothing of asking a patient to sit for that length of time, filling out paperwork as part of their “new patient experience.” Many dental offices rationalize this as necessary. Perhaps you’ve even gone so far as to warn the patient, “Come in 20 minutes before your appointment so that you can complete some paperwork.” But to busy new patients who are trying to cram this visit into a lunch break, waiting 15 – 20 minutes to be seen feels like a huge disrespect of their time. What makes it especially painful is that in this day and age there’s no need for it. Technology makes it easy for potential clients to access new patient paperwork and consent forms online, allowing them to complete these tedious time gobblers when it’s convenient for them and not when they’re in a hurry to get back to work.

If you’re worried that new patients don’t want to go online to access

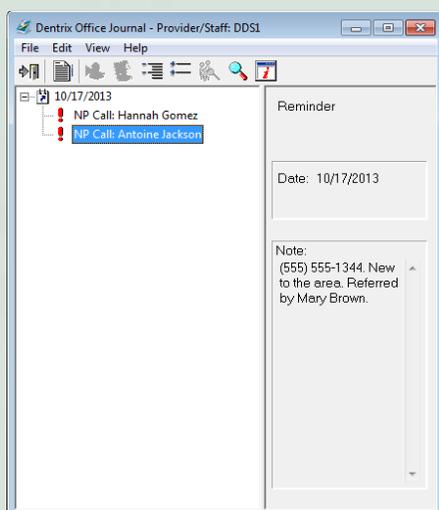


Figure 3 The Office Journal allows you to generate interactive New Patient Call lists for your doctors.

Make your new patients feel important by valuing their time, making personal connections, and respecting their opinions.

and set the **Date** as the day the doctor should make the phone call. Type the new patient’s name and phone number in the **Note** field and click **OK**. The doctor can either launch the Office Journal to access the reminder list before making the VIP phone calls, or you can print a filtered list for the doctor to take home (Figure 3).

Timing is Everything

Most people rank being asked to wait as first or second on their list of

forms, don’t be. In the same service industry study, researchers found that 87 percent of respondents would use technology if it would save them 15 minutes of wait time.³

A Dentrix eCentral website can make this process even more streamlined by not only allowing patients access to your new patient forms, but also by allowing them to complete your forms through a secure Internet connection. With an eCentral website, you can create custom forms in the

² “New Survey Reveals How Much Customers Hate to Wait.” <http://www.greatclips.com/about-us/press-room/time-survey>. Accessed online 4/12/2013.)

³ Ibid

Dentrix Questionnaires module that can be uploaded to a special **New Patients** page on your website. New clients access the forms by typing in their name and appointment date (Figure 4). Once the forms have been submitted, they show up on your computer in the Questionnaires module. You can then import the information directly into your Dentrix database, saving your staff from having to manually enter the information (which further extends your new patient's wait time).

Follow Up

The exceptional new patient experience doesn't end when the new patient leaves your office. Be sure to follow up the patient's visit with a phone call asking for feedback. Communicate to the new patient that you wanted to exceed their expectations and ask if you were able to do so. Ask specifically what you did well and what you can do better. End the phone call by thanking them for choosing you as their dental care provider.

To make certain that you're consistently gathering the same information, add a New Patient Exit Interview questionnaire to the Dentrix Questionnaires module. You can use the questionnaire as a script for the phone call and as a place to store the information (Figure 5). Every week, you can open the Questionnaires module and review the responses to the interviews you've stored as a way to help you identify where your new patient experience is succeeding and where you've got some room for growth.

Excellent customer service can turn a new patient into a lifelong patient. Make your new patients feel important by valuing their time, making personal connections, and respecting their opinions. By taking these steps, you create a truly exceptional new patient experience. **DM**

LEARN MORE

To learn more about setting up provider time blocks, visit the *Dentrix Resource Center* to view the "Perfect Day Scheduling" on-demand training title. You can learn more about using the *Office Journal* by viewing the "Office Journal" section of the *Dentrix Help*. To learn more about using *Questionnaires*, see the "Questionnaires" section of the *Dentrix Help*. See "How to Learn More" on page 2 for instructions on accessing these resources.

Figure 4 New patients can easily access and complete online versions of your forms by signing on to your eCentral website.

Figure 5 The Questionnaires module makes it easy to follow up a new patient visit with a satisfaction survey.



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- Reduce data entry and human error for patient scheduling and questions
- Improve the ability to collect balances and settle accounts
- Reduce the duration of routine calls



Our easy-to-use cloud-based phone system OfficeSuite integrates completely with Dentrix G5 so when a call comes into your practice, your staff will immediately be presented with patient details including the name and phone numbers, appointment information, treatment history and prescriptions, payment status, even family records—all from one screen.



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Erin Brisk
Contributing Editor

Act Now to Boost **YEAR-END PROFITS**

Now that the back-to-school rush is over, it's time to start thinking about the end of the year. It's a great time to encourage patients with dental insurance to use their insurance benefits before they expire. Many patients don't realize that they have unused insurance benefits, or they're unaware that unused benefits expire. By contacting your patients now, you'll be doing them a favor by helping them maximize their remaining insurance benefits, and you'll be giving your practice a year-end profitability boost.

Dentrix has several tools and features that can make it easy for you find and contact these patients. You can use the Treatment Manager to get a list of patients who have treatment-planned procedures and remaining insurance benefits, and then you can use the tools in the Treatment Manager to contact individual patients by phone, email, or letter. If you want to send a letter to the entire group of patients who have treatment-planned procedures and remaining insurance benefits, you can use the Letter Merge to merge year-end letters for the entire group at once.

Creating a Filtered List of Patients

One of the most powerful tools available is the Treatment Manger (Figure 1). You can use the Treatment Manager to generate a filtered list that shows just the patients you need to see. And since the Treatment Manager is an interactive list, once you've generated the custom list of patients you can work directly from the list to call patients, send email messages, generate quick letters and quick labels, make Office Journal notes, and enter guarantor notes.

* Patient	Last TP	TP Total	Ins Est	Pat Est	Pri Rem	Sec Rem	Next Appt	Prv OJ	E-r
* Adder, Michael	12/30/2012	2950.00	2916.00	34.00	1593.20	1946.60	08/01/2013	06/03/2013	add
* Alberts, Brett A	07/16/2013	3475.00	1608.00	1867.00	1608.00	N/A		05/18/2013	
* Bell, Kevin	02/01/2013	3930.00	1270.40	2659.60	1270.40	N/A	08/16/2013	05/20/2013	kbe
* Brown, Mary	02/16/2013	4461.00	1713.60	2747.40	1713.60	N/A	08/09/2013	09/11/2012	1M
* Crosby, Brent L	05/06/2013	874.00	659.20	214.80	1158.40	N/A		06/03/2013	1Br
* Crosby, Shirley H	05/06/2013	2205.00	1278.50	926.50	1408.00	N/A	09/05/2013	07/26/2013	1Sh
* Earhart, Megan	06/11/2013	1610.00	1063.30	546.70	1908.00	Unlim.	08/31/2013	09/11/2012	
* Fawson, Jett	01/31/2013	2085.00	2085.00	0.00	2000.00	1500.00		01/26/2013	jett
* Fox, Shawn	01/31/2013	1979.00	989.50	989.50	Unlim.	N/A			
* Greene, Phillip	02/25/2013	2262.00	2141.20	120.80	937.40	2392.60		06/03/2013	phil
* Hansen, Corey L	03/02/2013	2154.00	2144.50	9.50	1367.00	900.00	09/02/2013	02/21/2013	cha
* Hunt, Sharilyn J	01/30/2013	1449.00	1119.20	329.80	1500.00	N/A		09/11/2012	
* Jackson, Carla	01/30/2013	1190.00	1190.00	0.00	2408.00	1500.00	08/30/2013	06/06/2013	

Figure 1 The Treatment Manager is an interactive list you can use to find specific patients and then contact them.

To access the Treatment Manager, from the Appointment Book click the **Treatment Manager** button. In the **Treatment Manager View** dialog box, specify your filter criteria. The Treatment Manager list will be generated based on the criteria you specify.

You can enter any filter criteria that makes sense for your practice, but if you're contacting patients about scheduling an appointment before the end of the year, it's a good idea to find patients who meet the following criteria: a) active patients, b) have

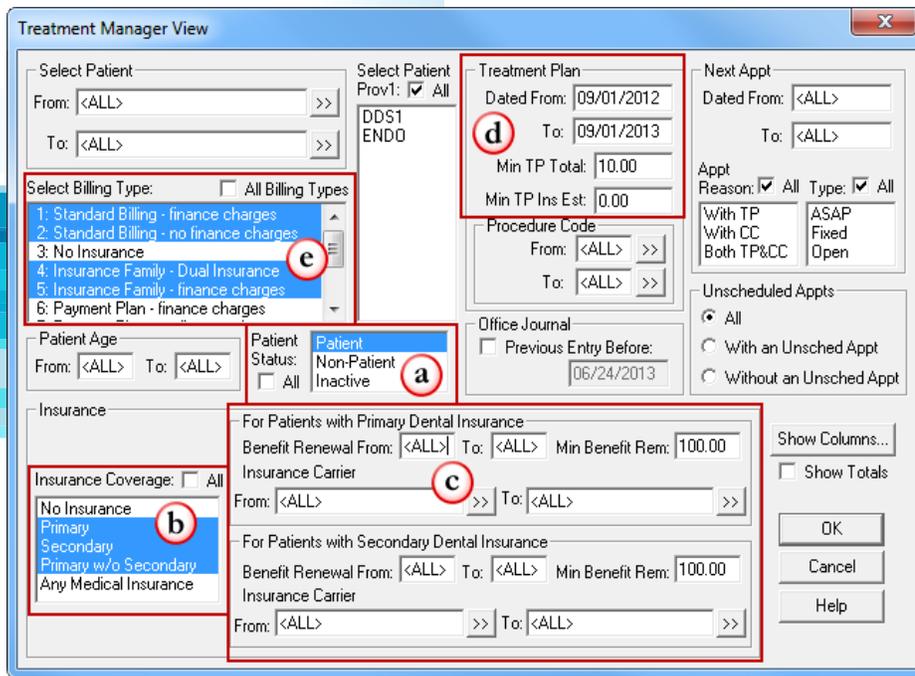


Figure 2 Use the options in the Treatment Manager View settings to filter the patients that appear on the list.

insurance, c) have at least \$100 of either primary or secondary insurance benefits remaining for the year, d) have a treatment plan worth at least \$10 that was diagnosed in the last year, and e) are not on either the Bad Debt, Payment Plan, or No Insurance: billing types (Figure 2). Once you have set up the search criteria, click OK to generate the list.

Contacting Patients Using the Treatment Manager

Once you have generated the Treatment Manager list, you can look at the information about each patient and decide if you want to contact them, and if so, how you want to do it. For example, if you know a patient has a flexible schedule and can schedule

an appointment right away, select the patient and click the **More Information** button to see a list of that patient's contact information (Figure 3). Call the patient and schedule the appointment. Then, right-click the patient and select **Hide Patient** to hide them from the list once you have contacted them.

You can also use the Treatment Manager to contact patients who respond best through email. Select a patient and click the **Send Message** button. A blank email message will open. If the patient has an email address entered in the Family File, the patient's email address will be listed in the **To:** field. You can then type the message and send it to the patient (Figure 4).

If you want to send a letter to certain patients, you can generate a quick letter from the Treatment Manager that shows patients their treatment plan totals and remaining insurance benefits. Select the patient to whom you want to send the letter, and then click the **Quick Letters** button. In the **Quick Letters** dialog box, select the letter called Treatment Plan Reminder (dtxlm21.doc) and click **Print** (Figure 5). (Note: The Treatment Plan Reminder letter may not be available in your Quick Letters dialog box. If it isn't, follow the instructions in the "Adding Letters to Quick Letters" topic in the *Dentrix Help* to add it.)

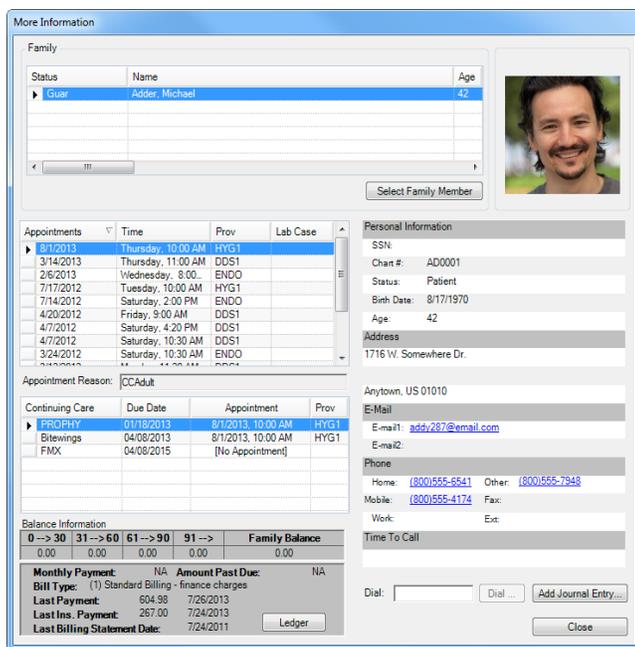


Figure 3 The More Information dialog box shows you all of the patient's contact information, along with appointments, continuing care, and balance information.

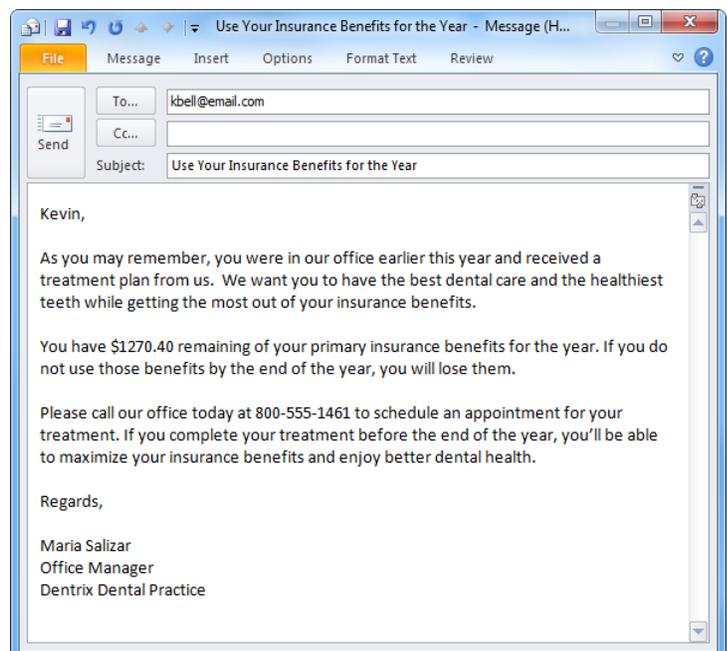


Figure 4 If you have a MAPI-compliant email server (such as Microsoft Outlook) set up in your office, you can quickly generate a customized email message.

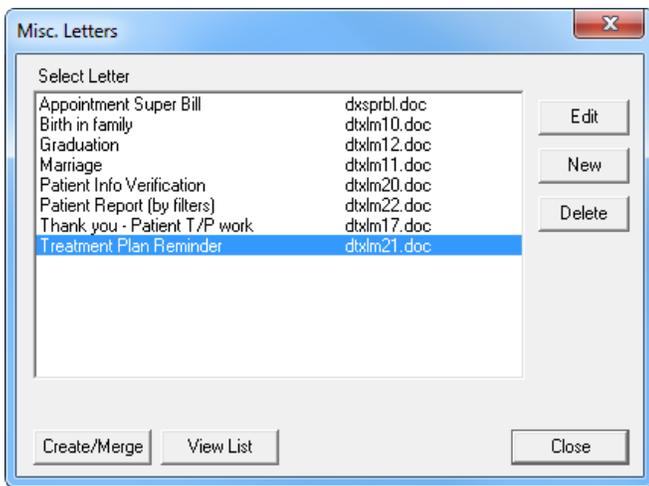


Figure 5 You can use Quick Letters as needed to create a single letter for just the selected patient.

You can also print a mailing label to attach to the letter by clicking the Quick Labels button. From the **Quick Labels** dialog box, select **Patient Mailing Label**, and then click **Print** (Figure 6).

Finding More Information Using the Treatment Manager

Not only does the Treatment Manager give you several options for contacting patients, but because it's an interactive list, you can use it to find any information you need about a specific patient or their account. You can also use it to enter guarantor notes with information you get from patients as you talk to them, and you can create Office Journal entries to keep track of your contacts with the patient.

With a patient selected in the Treatment Manager, click the **Treatment Planner** button to open the Treatment Planner directly. From there you can view the patient's treatment plan to decide which procedures are the priority for the amount of insurance benefits remaining.

You can also access the other Dentrix modules from the Treatment Manager. Click the **Ledger** button to

view patients' balance information and outstanding insurance claims to ensure that their accounts are in good standing before you contact them. Click the **Family File** button to view patient information, patient notes, and specific insurance plan information.

As you are contacting patients, it's a good idea to create an Office Journal entry that summarizes the contact. That way if there are several different people in your practice contacting patients, you can see who was contacted, when they were contacted, and how. To add an Office Journal entry, select a patient on the list and click the **Office Journal** button. From the Office Journal, click the **Add Journal Entry** button to document the patient contact you made (Figure 7).

Sending Year-End Letters Using the Letter Merge

Some practices may want to generate letters for the entire group of patients who have treatment-planned procedures and remaining insurance benefits all at once. Then, after the patients have received the letter and had a chance to respond, you can use the Treatment Manager to follow up with each patient individually.

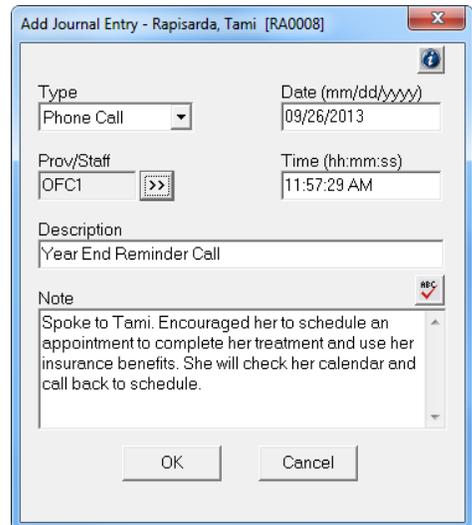


Figure 7 It's important to document the phone calls, emails, and other patient contacts you make so you can remember what was said and prevent duplicate contacts.

The Dentrix Letter Merge allows you to send a letter to all the patients in this situation. You can set up data filters in the Letter Merge that are similar to the ones in the Treatment Manager to narrow the list of who will receive the letter. This way, only active patients who have treatment-planned procedures and at least \$100 of remaining insurance benefits will receive the letter. Additionally, you can also set up filters to exclude patients who have an outstanding balance or are attached to a particular billing type.

To merge the letters, from the Office Manager, click **Letters > Misc.** In the **Misc. Letters** dialog box, select the Treatment Plan Reminder Letter (dtxlm21.doc), and click **Edit** to set up the filters you want to use for this letter (Figure 8). (For detailed instructions about setting up the appropriate filters for the year-end letter, log in to the Dentrix Resource Center and search for article #67325.)

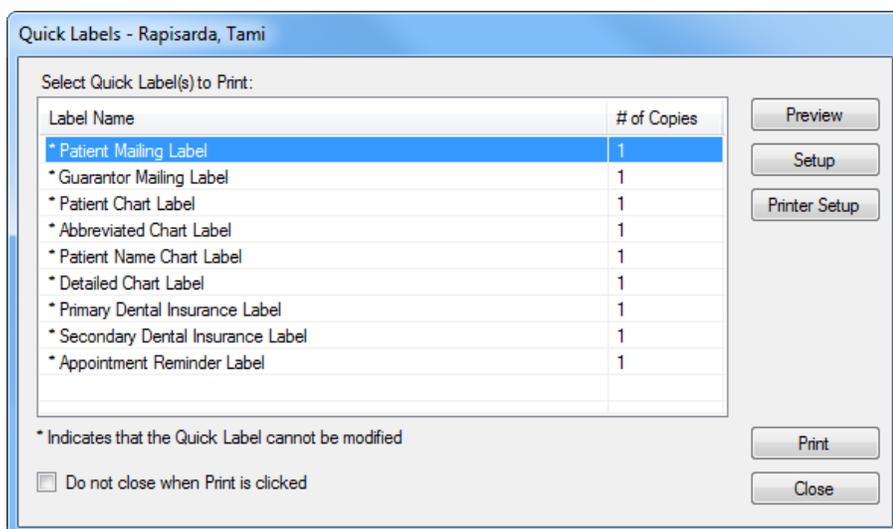


Figure 6 You can easily mail a letter, statement, or postcard to an individual patient by using Quick Labels to create a single mailing label.

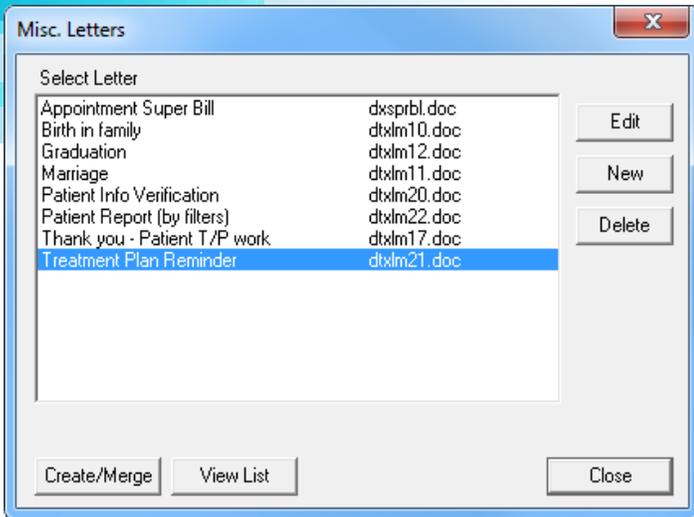


Figure 8 You can use the Treatment Plan Reminder letter to remind patients of their outstanding treatment and inform them of the amount of insurance benefits they have remaining.

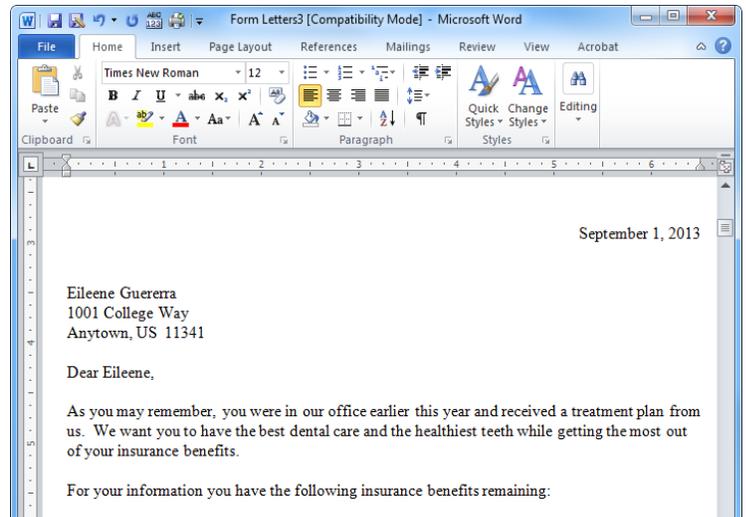


Figure 9 Dentrix will create merged letters in Microsoft Word for patients who have remaining insurance benefits that you can send to patients before the end of the year.

Once you have set up the filters, click **Create/Merge** to merge the letters. Dentrix will create a data file that contains all the patients who match your filter criteria and then merge the information into Microsoft Word (Figure 9). You can then print the letters from Microsoft Word. Once you've merged your letters, you can generate mailing labels for all patients receiving a letter using the dtxlbl.doc letter template.

Don't wait until November to contact your patients about maximizing their insurance benefits and scheduling treatment before the end of the year. Begin contacting patients now so that you can plan for a productive final quarter of the year that will meet the needs of your patients and give you a boost in year-end profitability. **DM**

LEARN MORE

To learn more about the Treatment Manager, see the "Treatment Manager overview" topic in the Dentix Help. To learn more about creating year-end letters, see the "Remaining Insurance Benefits Letter" article (article #55937) in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.

DENTRIX BUTTONS

This article mentions several Dentrix buttons you can use to access different features and information in the software. Below is a guide to the buttons mentioned in this article.



Opens the Treatment Manager, which allows you to create a filtered list of patients with outstanding treatment plans. Available from the Appointment Book.



Opens the Treatment Planner. When you click this button in the Treatment Manager, you do not have to go through the Patient Chart to access the Treatment Planner.



Opens the More Information window, from which you can see patient contact information, appointments, continuing care, and balance information.



Opens the selected patient's Ledger, which allows you to view their current balance information and outstanding insurance claims.



Opens a new email message with the patient's email address in the **To:** field.



Opens the selected patient's Family File, which allows you to view patient information, patient notes, and insurance plan information.



Opens the **Quick Letters** dialog box, which allows you to merge a letter with the currently selected patient's information.



Opens the Office Journal for the selected patient, where you can keep a log of all the contacts you've made with the patient.



Opens the **Quick Labels** dialog box, which allows you to generate a single mailing label for the currently selected patient.



Opens the **Add Journal Entry** dialog box, which allows you to add a new entry to the selected patient's Office Journal to document contact you had with that patient. Available in the Office Journal.

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The Dentrix Office Manager



Use Dentrix to Resubmit a Partial EOB

Learn how to split an insurance claim in the Ledger so you can process a partial payment.

■ **Dayna Johnson** | Certified Dentrix Trainer

It's Monday morning, and you're going through the weekend mail to start catching up on your insurance payments. As you start posting your first EOB in the Dentrix Ledger, you notice that the insurance carrier paid for the exam and bitewings, but they need an updated perio chart before they will submit payment for the perio maintenance cleaning. Which one of the following do you do?

A. Apply the partial payment, close out the claim, and then print an extra copy so that you have something to refer to because the original claim will not show up on your Insurance Aging Report.

- B. Resubmit the entire claim with the perio chart and hold the partial payment until you receive payment on the perio maintenance, and then post both checks together.
- C. Put it off until later and call Dentrix Customer Support.
- D. Split the claim into two parts, apply the partial payment to the exam and bitewings, and leave the perio maintenance open so it will show up on your Insurance Aging Report.

The correct answer is . . . D. Dentrix makes it easy for you to split an insurance claim in the Ledger so you can process partial payments. If you don't know how to split an insurance claim, I'll show you.

Splitting an Insurance Claim

From the Ledger, highlight the claim that you want to split. From the **Insurance** menu, click **Split Primary Claim**. In the **Split Claim for...** dialog box, highlight the perio maintenance procedure and click the down arrow to move it under Claim #2, as shown in Figure 1. Click **OK**.

You now have two separate insurance claims. You can pay off the claim for the exam and bitewings with the check you received today, and you also have an open claim that you can attach the perio chart to and resend to the insurance company for payment. The perio claim will still show up on your Insurance Aging Report for easy tracking.

You can use this procedure for other situations such as rebilling when a crown buildup has been denied, when X-rays have been requested, or when other denials or partial payments require submission of a narrative to the insurance company. **DM**

LEARN MORE

To learn more about splitting insurance claims, see the "Splitting primary insurance claims" topic in the Dentrix Help. You can also view the Claims Management webinar recording in the Dentrix Resource Center. See "How to Learn More" on page 2 for instructions on accessing these resources.

Dayna Johnson, founder and principal consultant of Rae Dental Management, helps dental offices improve patient care, increase collections and reduce staff headaches by implementing efficient management systems. With 19 years experience in the business and technical side of dental offices, Dayna's passion for efficient systems is grounded in both personal understanding and professional expertise. Dayna can be reached at dayna@raedentalmanagement.com or visit her website at www.raedentalmanagement.com.

Claim #1					
Tooth	Surface	Description	Date	Code	Fee
		7BwX	05-30-2013	D0277	81.00
		Periodic Evaluation	05-30-2013	D0120	50.00
Total Billed:					131.00

↓ ↑

Claim #2					
Tooth	Surface	Description	Date	Code	Fee
		Periodontal maintenance	05-30-2013	D4910	165.00
Total Billed:					165.00

OK Cancel

Figure 1 The Split Claim for dialog box.



Save Time with Online Forms

Save time and increase customer satisfaction by allowing patients to update their medical history and patient information forms online.

■ **Christy Rasmussen** | eServices Coach

In a recent survey, 87 percent of customers said they would rather fill out forms online before their appointment if it would save them time during their visit. Why not give your customers what they want by allowing patients to update their medical history and patient information forms online before their dental appointment? With Dentrix and the eCentral Website Manager, patients can complete their forms online on your practice website. Best of all, once they've completed the forms, you can import them directly into Dentrix without having to type a thing.

To get started using online forms, you need to set up the forms in the Questionnaires module and then link them to your website through the Web Sync wizard. (For more information on setting up online forms, visit the Dentrix

Resource Center to view the "Posting Questionnaires on Your Website" article #61032.)

Once the forms are set up, both new and existing patients can complete forms online. When a new patient visits your website, they can access forms by entering their name and appointment date. When existing patients visit your website, they will need to log in using the credentials they created when they registered for the site (Figure 1). Once logged in, they can then click the **Forms** tab to see what forms they need to fill out for their next visit.

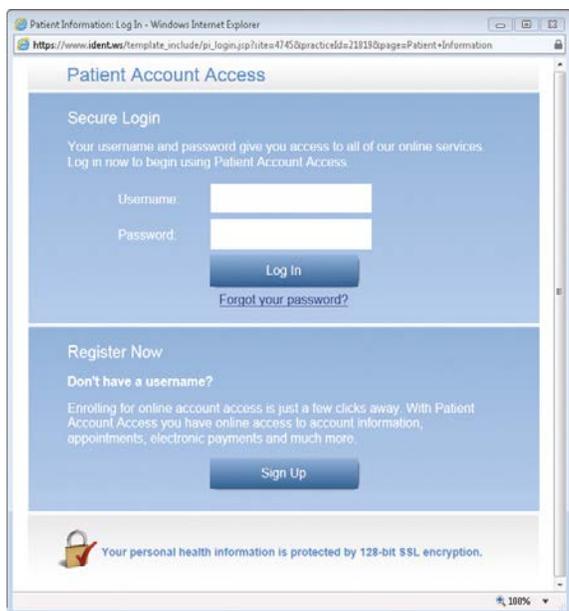


Figure 1 Existing patients can log in to a secure location on your website to view and update their forms.



Figure 2 Any forms that patients need to fill out or update are listed on the Forms tab.

To begin working on a form, the patient simply clicks the name of the form (Figure 2) to open an online version of it. For existing patients, any previously entered information is displayed in the form so that the patient can simply correct changed information, rather than having to enter all the information again. The patient completes the form and then clicks **submit** when finished.

Meanwhile back in the office, staff will receive a pop-up notification in the lower-right corner of the desktop, indicating that a new form is available for import (Figure 3). By clicking the notification (or by going in to the Questionnaires module), your staff can use

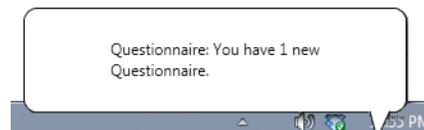


Figure 3 A pop-up notification appears to let you know that a new form is ready for import.

the forms to update the patient's Family File with just a few clicks.

Patients will thank you for the convenience of online forms, and you'll love it for the efficiency it adds to your front-desk routines. **DM**

LEARN MORE

To learn more about online forms, see the "Website Manager" topic in the eCentral Help, visit www.dentrix.com/website manager, or visit the Dentrix Resource Center to view the "Allowing Patients to View and Update Their Info Online" article #61033. See "How to Learn More" on page 2 for instructions on accessing these resources.



Proven Strategies to Increase Your Collections

Help yourself move into a higher collections percentage on past due balances by using these tips to work with overdue accounts.

■ **Jill Nesbitt, MBA** | Practice Administrator and Dental Consultant

Help me to help you!" I love that line in Jerry Maguire. It sums up the old truism that help comes after we help ourselves. This can be especially true when it comes to collecting from patients with past due accounts. By spending a little time gathering accurate information and "working" our past due accounts before we send them to collections, we have seen dramatic increases in our ability to collect unpaid balances.

Helping Ourselves to Collect

To make sure no one has slipped through the cracks as we follow our regular "collect at the front desk" guidelines, our collections routine starts with using the Dentrix Collections Manager (Figure 1). To start the Collections Manager, open the Office Manager and click **Analysis > Collections Manager**.

You'll be prompted to select search criteria so that you can limit your list to only past due accounts. (For more help in choosing your search criteria, see the "Setting up a view for Collections Manager" topic in the Dentrix Help.)

Once we have the report open, we follow a quick process for accounts that need to be paid:

1. **Send a statement.** If we can see that the account is recently past due, we select the guarantor in the Collections Manager and then click the Ledger button. From the guarantor's Ledger we can then click the **Process Billing Statement** button to send a statement to the patient right away.
2. **Send a courtesy letter and make a phone call.** We created our own collection letters and mail merge them using the Quick Letters feature in Dentrix. In addition to our standard courtesy letter, we

Guar Name	Balance	0->30	31->60	61->90	91->	Last Prmt	Prmt Amt	To Ins	Ins Est	Guar Est
Wolodarsky, ...	811.95	12.00	0.00	0.00	799.95	05/31/2012	1988.00	0.00	0.00	811.95
Xavier, Brittan...	230.25	3.40	0.00	0.00	226.85	05/31/2012	1845.00	0.00	0.00	230.25
Abbott, Kenn...	1328.29	19.63	0.00	872.00	436.66	03/08/2013	160.20	872.00	859.50	468.79
Crosby, Brent L	2271.82	692.69	0.00	184.00	1395.13	03/08/2013	50.00	1602.00	994.40	1277.42
Farrer, Lisa	1818.71	26.88	336.00	932.00	523.83	03/08/2013	451.10	932.00	480.90	1337.81
Gutterman, M...	378.41	5.59	0.00	230.00	142.82	03/08/2013	46.00	230.00	184.00	194.41
Ingles, Jeremiah	1724.57	25.49	0.00	74.00	1625.08	03/08/2013	50.00	74.00	24.00	1700.57
Isaacs, Jonath...	196.59	2.91	0.00	92.00	101.68	03/08/2013	92.00	0.00	0.00	196.59
Jackson, Edwin	1360.02	20.10	0.00	749.00	590.92	03/08/2013	25.00	772.40	714.90	645.12
Reyes, Xochitl	2469.57	36.50	0.00	266.00	2167.07	03/08/2013	150.00	133.00	133.00	2336.57
Smith, Jordan	1318.99	19.49	0.00	932.00	367.50	03/08/2013	36.60	932.00	520.90	798.09
Weinrib, Gary L	190.51	2.82	0.00	92.00	95.69	03/08/2013	153.71	92.00	92.00	98.51
Hiland, Marina	1651.26	24.40	0.00	0.00	1626.86	03/15/2013	50.00	329.00	263.20	1388.06
Jimenez, Pedro	458.27	6.77	0.00	0.00	451.50	03/28/2013	25.00	102.00	83.20	375.07
Wallace, Harvey	1895.30	28.01	0.00	0.00	1867.29	03/28/2013	250.00	184.00	184.00	1711.30
Adder, Michael	705.20	10.42	115.00	579.78	0.00	04/02/2013	113.00	0.00	0.00	705.20
Mahoney, Kev...	132.00	132.00	0.00	0.00	0.00	05/30/2013	750.00	0.00	0.00	132.00
Labeau, Edwin	304.54	135.54	0.00	0.00	169.00	06/17/2013	50.00	269.00	269.00	35.54
Cackowski, M...	1663.98	24.59	0.00	0.00	1639.39	07/11/2013	25.00	749.00	374.50	1289.48
Degaytair, Elai...	127.76	1.89	0.00	0.00	125.87	07/11/2013	455.00	0.00	0.00	127.76
Reeves, Joshua	4082.11	61.80	0.00	0.00	4020.31	07/15/2013	100.00	1540.00	745.00	3337.11

Figure 1 The Dentrix Collection Manager can help you to work your collections routine more efficiently.

have several different letters we use as the situation requires. For example, we have letters for when patients have stopped making payments or when they've only made a partial payment.

Quick Letters makes it easy to quickly generate the most appropriate letter right from the Collections Manager. After selecting the guarantor in the Collections Manager, click the **Quick Letters** button. Next, select the letter you want to merge and click **Build/View** (Figure 2). The letter opens in Microsoft Word with the patient's name, address, and other pertinent information merged. Simply review the letter, make any changes, and click **File > Print** to print the letter.

I really like how Dentrix automatically adds a note to the Office Journal indicating the date the letter was created and the letter name. That way, if patients want to talk about the letters they've received (or they claim they've never received), I have a readily available history of our correspondence.

3. **Send a second, more forceful letter and make a second phone call.** In addition to being able to use our customized Quick Letters, the Collections Manager also helps by making phone calls a snap. By selecting the patient I want to contact and then clicking the **More Information** button, I can see a list of all the available phone numbers for the patient (Figure 3). Plus, I can click the **Add Journal** entry

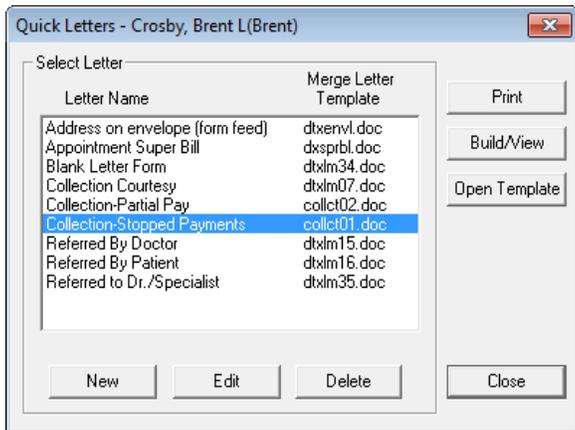


Figure 2 You can use the Quick Letters feature to generate customized collection letters.

button to record details about the conversation with the patient.

4. **Decide to either write off the balance (if it's less than \$100) or send it to collections.** For patients that continue to ignore us (and that have an account balance over \$100), we send the account to a collections agency. I've worked with several different agencies over the years, and we've settled on one that makes phone calls rather than just sends letters since we're handling that on our own.

Helping Your Collections Agency to Help You

Despite our best efforts, we still wind up with past due accounts that we must send out to a collections agency. But, after a recent performance review with our collections agents, I discovered how much we could help them to help us.

At my request, the agency completed an Integrity Analysis Report that revealed some very interesting trends. The agency was only able to collect 12 percent on accounts where we provided them with a correct address but the phone number(s) were disconnected or wrong. However, if we provided them with a working phone number and a correct address, their collections jumped to 40 percent. Even more amazing, if we could also provide them with valid work and home phone numbers, the agency was able to collect about 75 percent of the balances owed. (To put that in actual dollar amounts, if we had \$1,000 in collection accounts, we could collect an additional \$630 just by making sure that the collection agency

was given good information to work with!)

After discussing our Integrity Analysis Report with the agency, I shared the results with our administrative team. We were all surprised at how drastic the difference was, merely by providing good contact information.

Thanks to this review our team now makes sure that we're sending every possible phone number and address we have available to the agency. Additionally, our staff tries to gather

this information early on as part of our collections process. We've realized that if we can make sure we have good phone numbers and addresses as part of the payment collection process, perhaps we can continue to collect past

due balances even when the patient becomes non-responsive to our efforts.

Managing your past due balances is never fun, but by putting processes in place to standardize your collections operations, you'll help yourself move to a higher collections percentage. **DM**

Jill Nesbitt is a dental consultant piloting a comprehensive dental staff training program in Nashville after managing a group practice with six dentists, twenty staff, and eighteen operatories for 16 years. Jill has an MBA and writes a weekly blog, www.dentalpracticecoaching.com. Jill is passionate about helping other office managers develop their careers and helping their dentists run successful businesses through her consulting practice.

LEARN MORE

To learn more about using the Collections Manager, see the "Collections Manager" topics in the Dentrrix Help. See "How to Learn More" on page 2 for more information about accessing this resource.

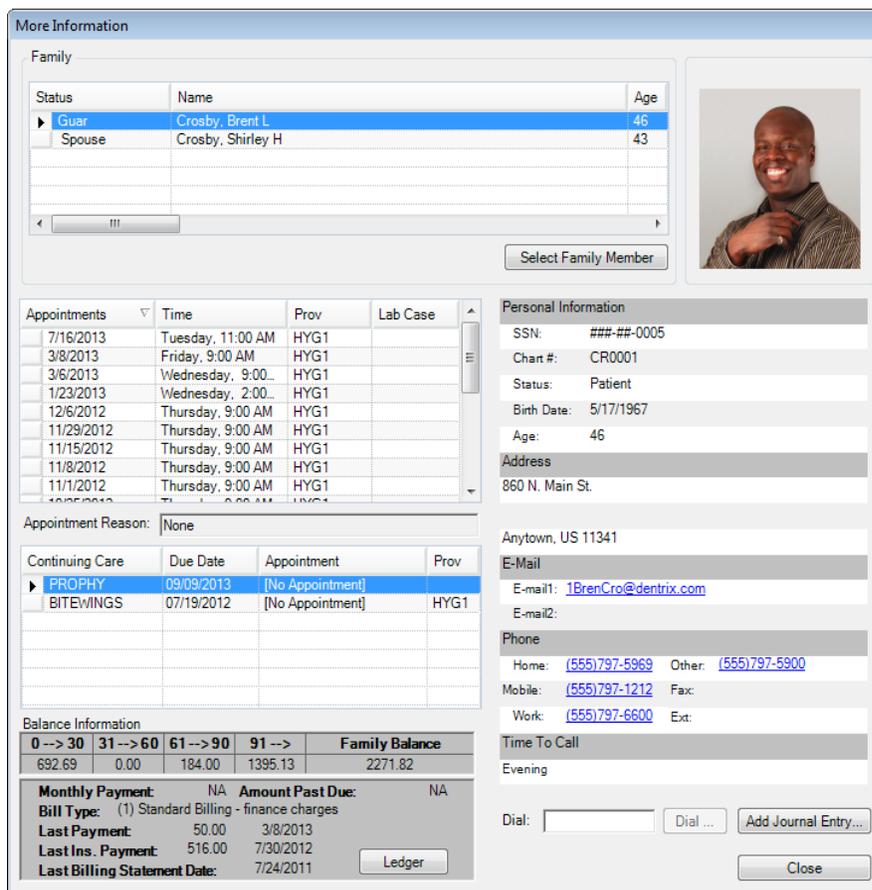


Figure 3 The More Information dialog box allows you to see phone numbers and add contact notes to the Office Journal.



Wi-Fi for Your Waiting Room

Learn how adding a Wi-Fi network to your waiting room can benefit your practice.

■ **Jason Werner** | Marketing Manager, Henry Schein TechCentral

Within the next three years, it is predicted that the number of mobile devices in use will likely exceed the number of people on Earth. According to a CTIA study last year, the number of mobile devices in use in the

A few years ago, practice visitors expressed surprise at the availability of Wi-Fi—now they are frustrated by its absence.

United States has already exceeded the U.S. population. Statistically, this means that every person in your waiting room carries at least one device capable of connecting to the Internet. Do you have a Wi-Fi network available for your patients and visitors to use? And if so, does your Wi-Fi network also keep your business network private?

Why Should I Care?

This is the information age and your patients have embraced technology. They receive news updates, tweets, RSS feeds, and texts throughout the day. For many patients, the stacks of magazines cluttering your waiting room may not have as much significance as they did in past years—but a Wi-Fi connection does. Free Wi-Fi is a standard amenity in most businesses. A few years ago, practice visitors expressed surprise at the availability of Wi-Fi—now they are frustrated by its absence.

What's in It for Me?

These are just a few of the benefits of adding free Wi-Fi to your practice:

Save time. A Wi-Fi network, kiosk software for Dentrax, and a few iPads allow patients to check in and update

information without involving office staff. This frees up time for your team to help other patients or work on tasks other than data entry, and they won't waste time deciphering patients' handwriting.

Reduce clutter. Free Wi-Fi for your visitors allows you to cut down on magazine subscriptions for your waiting room. Many patients will occupy themselves with online banking, webinars, and business from their smartphones, tablets, or laptops.

Improve patient relations. Although your patients have appointments, schedules do not always run on time. Free Wi-Fi access shows your patients that you value their time by helping them stay productive while they wait.

Create goodwill to win new patients. Not all of your Wi-Fi users are patients—at least not right now. A friend or relative waiting with your patient is a prospective patient. Free Wi-Fi in your waiting room is an amenity that can tip that prospective patient in your favor.

Gain a competitive advantage. Consumers love free. Offering free Wi-Fi is a powerful marketing tool and a competitive advantage for your practice.

Poise your practice for future growth. The demand for Internet access will continue to grow—both for your patients and your practice. Going forward, you'll see new dental and business devices cut the cord and rely solely on Wi-Fi connectivity. Dentrax Mobile is a perfect example of how critical practice solutions are moving to mobile devices. Look at how often smart phones and tablets are used in your practice now. Connecting these devices via Wi-Fi, as opposed to using a carrier's data plan, is less expensive, faster, and more secure.

With Great Wi-Fi Comes Great Responsibility

Wi-Fi is a powerful tool, and with it comes a responsibility to your patients.

You must properly set up and configure your wireless router to keep your practice data safe and to keep undesirable websites, inappropriate content, and malicious malware out of your practice.

Henry Schein's TechCentral experts can provide your office with a business-grade Wi-Fi router and installation to get you safely and quickly connected. TechCentral's Wi-Fi solution uses one Wi-Fi router to provide separate and secure wireless networks for both your visitors and your business staff. The business Wi-Fi is hidden from the public and ensures that visitors can't get to your protected data and files.

TechCentral will also provide Internet security measures that continually self-update for protection against the latest Internet threats including the following:

- Websites that contain malicious software that infect PCs.
- Continual hacks that attempt to probe your network and commandeer your PCs.
- Websites that contain X-rated materials, gambling, and other undesirable content.

Get Secure Wi-Fi for Your Practice

Henry Schein's team of TechCentral experts can quickly determine your Wi-Fi needs and provide an affordable solution. More than 7,000 practices already rely on TechCentral for computer technology and support. A Henry Schein digital technology expert can visit your office, review your current technology, and make hardware recommendations. Whether you are adding Wi-Fi or upgrading your current network, a Henry Schein expert can provide high-performance Wi-Fi while keeping your practice safe. Call 877-483-0382 to schedule your free practice technology assessment, or visit www.HenryScheinTechCentral.com for more information. **DM**



DENTRIX WORKSHOPS 2013

Put More of Dentrrix to Work for You.

Find out how at a Dentrrix Workshop!

Ever wonder if you're doing things the hard way? Many Dentrrix users have only scratched the surface of what Dentrrix can do for them. Come to a hands-on workshop to gain an in-depth understanding of how Dentrrix works, so you can get the full benefit of many Dentrrix tools that will make your work easier, learn tips and tricks to streamline your daily routines, and become more productive and profitable!

Dentrrix Workshops Coming to 45 Cities Nationwide!

Insurance: Billing and Collections Workshop

Do It Right to Get Paid Faster



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

\$299 per person 1-day class for experienced Dentrrix users
9 a.m.–5 p.m.

NEW COURSE! Accounts Receivable Management Workshop

Take Control of Your Patient A/R



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

\$299 per person 1-day class for experienced Dentrrix users
9 a.m.–5 p.m.

Continuing Care Management Workshop

Optimize Your Continuing Care System



Improve patient care, retention and revenue by gaining an in-depth understanding of how to set up and maintain an effective continuing care system.

\$299 per person 1-day class for experienced Dentrrix users
9 a.m.–5 p.m.

Treatment Planning and Case Presentation Workshop

Create & Present Treatment Options Effectively



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

\$299 per person 1-day class for experienced Dentrrix users
9 a.m.–5 p.m.

Essentials Workshop

Master the Basics



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

\$449 per person 2-day class for newer Dentrrix users
9 a.m.–5 p.m.

\$40 OFF PER SEAT EARLY REGISTRATION SAVINGS!
WHEN YOU REGISTER AT LEAST 3 WEEKS EARLY



Earn up to 12 CE Credits



View Complete Course Information and Register Online at
www.Dentrrix.com/Workshops



SOLUTION SPOTLIGHT

OfficeSuite Dental and Dentrix: Increase Revenue by Maximizing Patient Interaction

■ **Kevin Goodman** | Managing Director of Channel Strategy & Development for Broadview Networks

Learn how OfficeSuite Dental integrates with Dentrix to improve front-office efficiency and patient customer service by automatically displaying detailed patient information each time patients call your office.

There are many dental practices vying for new business, and one of the easiest ways to set yours apart is to provide unparalleled customer service. At Broadview Networks, we understand your unique challenges, including increasing revenue, improving patient satisfaction, and boosting staff productivity—all while keeping operational expenses to a minimum.

OfficeSuite Dental™ helps dental practices achieve all these objectives by delivering an all-inclusive communications solution that is easy to use. It provides your practice with everything it needs to communicate with patients and other practice locations: a cloud-based phone system, unlimited nationwide calling, state-of-the-art IP phones, basic and

advanced system features, online fax service and call center services—all without any capital investment, maintenance contracts, or additional IT resources. Since the system is cloud-based, you can quickly and easily make changes and updates from anywhere, helping you to reduce operational expenses and ensure practice and patient continuity.

OfficeSuite Dental gets even more powerful when it is integrated with your Dentrix G5 practice management software. OfficeSuite Dental is the first phone system to integrate with Dentrix. It helps your practice increase revenue by maximizing every patient interaction.

Here's how it works. When a patient calls your practice, before the call is even answered, OfficeSuite Dental triggers an automatic pop-up window on front-desk staff PCs that displays patient records, including family history, appointments, clinical details, prescriptions, and account balances (Figure 1). By having all this data at their fingertips, your staff can create, confirm, or reschedule appointments in seconds for the patient and family members, and even answer questions about prescriptions and treatments. They can also collect overdue balances.

OfficeSuite Dental enables your employees to not only anticipate patients' needs, but to also address multiple needs with one short phone call without any searching. And, by enabling staff to accomplish multiple tasks in less time, you can boost your practice's overall efficiency while lowering your day-to-day costs.

OfficeSuite Dental is powered by the information already stored in your Dentrix G5 database and provides your staff with instant access to patient data and call records with every incoming call so they can deliver fast, helpful, and personalized service (Figure 2).

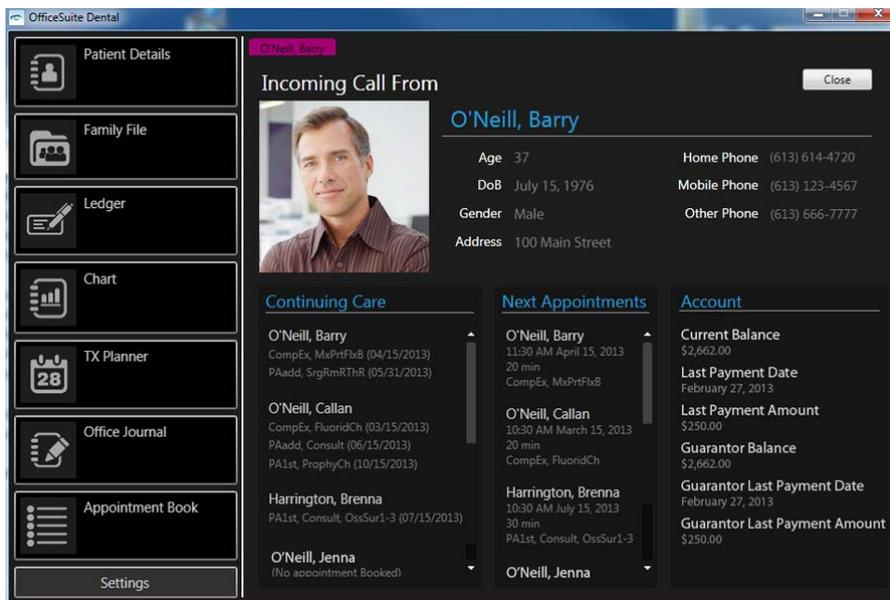


Figure 1 A pop-up window displays patient information the moment they call.

Delivering fast and personalized service makes all the difference in retaining existing patients, attracting new ones, and increasing your practice's revenue. Instead of having to put callers on hold and waste time looking up information in a separate system, OfficeSuite Dental puts everything in one place. If you can meet your patients' needs in a way that fits their hectic lifestyles, they will thank you by giving you more of their business and referring friends, family, and colleagues. This is just one of the many ways OfficeSuite Dental helps you grow your practice and your bottom line organically.

Imagine if staff could book multiple appointments in one phone call:

"Hi, Mrs. Smith. Are you calling to confirm your appointment at 1:30 tomorrow? Great, we'll see you then. And by the way, it looks like your son's six-month cleaning is due. How is next Wednesday at 4:00? Perfect, you're all set."

OfficeSuite Dental makes it easier for your staff to see scheduling opportunities and book more continuing care appointments each time patients call your office (Figure 3). It also reduces the number of calls they must make to patients, helping you increase revenue and decrease operational expenses.

In a similar fashion, your staff no longer has to mail as many bills or make as many phone calls reminding patients of outstanding balances. With OfficeSuite Dental, all of that account information is in front of your office staff when the patient calls. Staff can remind patients on the spot and settle accounts instantly.

OfficeSuite Dental saves time and improves efficiency by providing your staff with one-click access to all the Dentrix functions. With a single click in the OfficeSuite Dental pop-up window, you are taken to the appropriate place in Dentrix for the patient who is calling. Staff can access and update the patient's appointments, family file, contact information, chart, prescriptions, and ledger. And since OfficeSuite Dental displays



Figure 2 See who is calling and anticipate their needs before picking up the phone.

the patient's information the instant your phone rings, your staff never has to type their name, saving time and reducing data-entry and operational costs.

OfficeSuite Dental delivers other benefits for practices. It helps you prioritize calls to ensure that patients speak to the right person every time. For example, the skills-based routing feature forwards calls to the employee best equipped to assist patients based on their needs, such as a procedural specialist or billing manager. In addition, OfficeSuite Dental helps you generate additional revenue from existing patients by using announcements on hold to inform callers of any current promotions.

Besides helping you improve the level of service that you provide to existing patients, OfficeSuite Dental also helps you improve new patient acquisition. Enjoy higher ROI on marketing efforts by tracking the success of campaigns and making adjustments to your advertising strategy based on real data. It takes the guesswork out of marketing by showing you what works so you can maximize the advertising dollars you spend.

OfficeSuite Dental also saves your practice real money since it is easy to manage, saving you from having to pay extra for simple changes to the system. Adding a new staff member takes only minutes. Changing the call routing on days when your office must close (for holidays, inclement weather, and so forth) is easily accomplished via an intuitive website that is accessible from your smart-phone or tablet.

Increasing revenue is the ultimate goal of every dentist. The challenge is to find one solution that helps you accomplish all the objectives that directly affect revenue, including patient satisfaction. With OfficeSuite Dental, your staff has all the tools they need to maximize every patient interaction and help grow your practice. **DM**

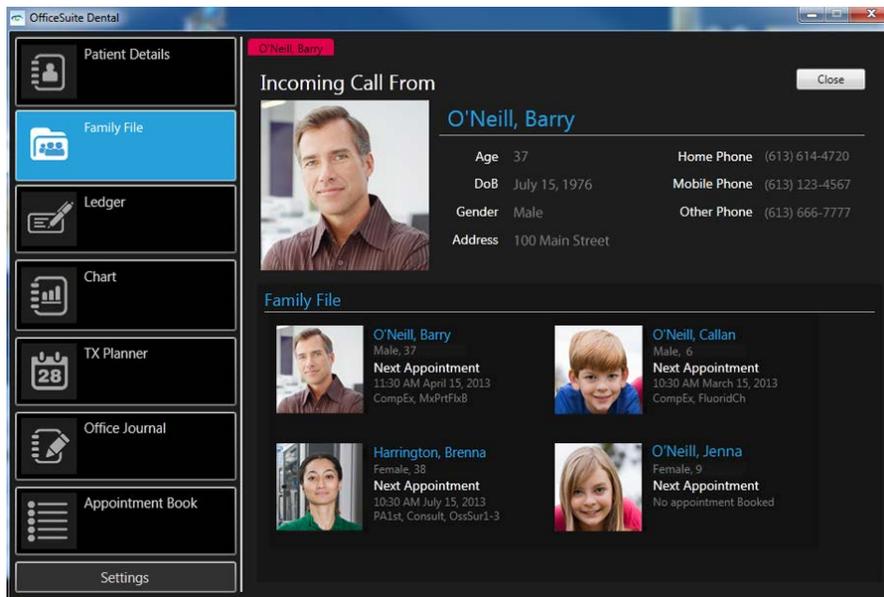


Figure 3 Increase revenue by booking more appointments for patients and their family.

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Solution Guide

You already depend on Dentrrix to make your practice more profitable and productive. Now with Dentrrix G5 you can add fully integrated third-party applications to make one powerful system that saves you time and increases the value of your technology investment.

Look for the Dentrrix G5 Connected Logo

The Dentrrix G5 Connected logo means these products have been carefully developed, tested and certified to work with your Dentrrix G5 platform, so you can add new capabilities with complete confidence. To see the full list of Dentrrix G5 Connected applications visit www.Dentrrix.com/Integrated-products today.

Broadview
www.broadviewnet.com



Network-Based Business Communication

Make your practice more profitable with OfficeSuite Dental the state-of-the-art phone system that fully integrates with Dentrrix G5. Increase patient satisfaction and enhance employee productivity with OfficeSuite Dental, the easy-to-use cloud-based phone system designed to make Dentrrix G5 even more powerful.



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www.healthcard.citicards.com



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One click. One solution. Patient financing just got a lot easier. The Citi® Health Card program is now integrated within Dentrrix G5. Spend more time on patient care and less money on your patient financing program costs. Citi Health Card and Dentrrix ... "Some things are just better together."



DentalWriter
www.dentalwriter.com



DentalWriter for Dentrix G5

For over 25 years, Nierman Practice Management, known for their Dental Writer™ and Cross Code™ software, has led medical billing in dentistry by continuously developing innovative products and providing exceptional training and seminars for dentists looking to grow their practices with Dental Sleep Medicine, TMD, oral surgeries and other services.



Practice Safeguard
www.practicesafeguard.com



Web-Based Fraud Monitoring

Practice Safeguard™ is an intelligence service for dentists unlike anything before: 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. Now, you can resolve potential issues instantly. See what financial security should be. Early adopter pricing is available now.



Demandforce
www.dentrix.com/demandforce



Demandforce for Dentrix

Demandforce works seamlessly with Dentrix G5 software to automate online and offline communications with existing patients to improve in-office efficiencies, help enhance your web presence with online reviews and social media integration to attract new patients and increase brand awareness, all while measuring results month to month.



Text2Floss
www.Text2Floss.com



Patient Education

Text2Floss is an interactive educational tool meant to help patients develop positive oral hygiene habit by delivering oral health information through the use of text messaging and mobile technology. Text2Floss is an initiative of A.T. Still University's Arizona School of Dentistry and Oral Health.



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