dentrix
MAGAZINE

Have a Winning Season

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HENRY SCHEIN®

New Year's Resolutions

FROM THE EDITOR

According to a study reported in the University of Scranton's *Journal of Clinical Psychology* (December 13, 2012), 45 percent of Americans usually make New Year's resolutions, but only 8 percent successfully achieve them. (For a summary of the report, see www.statisticbrain.com/new-years-resolution-statistics.) Are you surprised? Neither am I. The truth is that keeping resolutions is hard; it requires lasting commitment and a well prepared game plan.

Dental practice teams also need a game plan. In this issue of *Dentrix Magazine*, Jim Philhower and Tammy McHood share ten plays you can include in your playbook to help you reach your practice's 2013 profitability goals. Their recommendations range from boosting the production generated from hygiene visits, to updating your coding and fees, to improvements in scheduling and collections. Read their article, "Have A Winning Season" (pp. 10-14), for the full list of recommendations.

Several other articles in this issue offer additional suggestions that will help you improve your efficiency and profitability. In her article, "10 Time Saving Tips for the Appointment Book" (pp. 18-22), May Wescott shares Dentrix tips that will speed up scheduling processes and increase the productivity of your front desk team. Dr. Matthew Krieger, founder and CEO of Million Dollar PPO, offers strategies to help you get paid faster and maintain your cash flow (pp. 28-29). And, Jason Werner, a career marketing professional, shares thoughts about using technology in your office to retain new patients after your marketing has drawn them in (p. 30).

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

Regards,

Matt Singerman
Editor

HENRY SCHEIN®

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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.

▼ Practice Safeguard, eDossea, and Weave Now Available in the Dentrix MarketPlace

Now available in the Dentrix Marketplace, Practice Safeguard™ is financial monitoring software developed by dentists and certified fraud examiners. It's a web-based tool that helps deter fraud by monitoring extreme and unusual transactions in your practice data. Practice Safeguard alerts you instantly to potential issues so that you can resolve violations and protect your income.

eDossea's cloud-based solution for secure, efficient, and painless record sharing between dentists and specialists is now available in the Dentrix MarketPlace as a Dentrix Connected

Partner. With eDossea, dental care providers can use web-based technology to transfer digital patient data (such as X-rays) between practices in a HIPAA-compliant environment.

As a Dentrix compatible product, Weave helps office staff personalize patient phone calls by automatically displaying basic family information from the Dentrix database whenever a patient calls your practice. Before the call is even answered, an alert appears showing the caller's family information, lists any upcoming birthdays, and indicates if there are scheduled appointments for the family or appointments that need to be scheduled.

Dentrix Marketplace continues to be a one-stop solution for dental offices seeking to extend the power of Dentrix by adding fully integrated applications and capabilities to their practice management platform. To see what other technologies are available, visit Dentrix MarketPlace at www.dentrix-marketplace.com.

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

▼ Henry Schein Partners with Dr. Charles Blair for Webinar on 2013 CDT Codes

Henry Schein recently had the exciting opportunity to partner with Dr. Charles Blair, a nationally recognized expert on dental coding, to present a webinar entitled "The Future of Dentistry and Expert Coding Advice." In the webinar, Dr. Blair discussed the new 2013 CDT codes, which codes offices should be using, and how they affect the way offices bill insurance. He also gave suggestions about how to use codes and claim narratives to maximize insurance reimbursements.

The live webinar was free to anyone who registered to participate. A recording of the webinar is currently available in the Dentrix Resource Center to all offices with a current customer service plan. To view the webinar recording, log in to the Dentrix Resource center at www.dentrix.com/resource-center. Click the On-Demand Training tab, click Profitability topics, and then click the title of the webinar, "The Future of Dentistry and Expert Coding Advice."

Henry Schein regularly offers webinars on a variety of Dentrix and eServices topics. Some webinars are freely available to any participants, and some are reserved for Dentrix Customer Service Plan subscribers. All of the webinars are recorded, and the webinar recordings are available for on-demand viewing in the Dentrix Resource Center. Visit www.dentrix.com/webinars today to see a schedule of upcoming webinars and to register for a webinar. Or, log in to www.dentrix.com/resource-center and click the On-Demand Training tab to view recordings of previous webinars.

▼ New Insurance Carrier Connections

DENTRIX® eClaims
DENTRIX® Attachments

On January 31, 2013 many new electronic connections were established for insurance claims, attachments, explanation of benefits, and eligibility verifications.

Electronic claims can now be sent through Dentrix to the following payors:

PAYOR ID	PAYOR NAME
CBID2	Regence Blue Shield of Idaho
81883	Arkansas Municipal Health Benefit Fund
KYCS1	Caresource KY
74385	Insurance Systems Inc.
93200	Regence Blue Cross Blue Shield of Washington
CAPHP	Caprock Health Plans
CB850	Regence Blue Cross Blue Shield of Oregon
CBID2	Regence Blue Shield of Idaho
HGL01	Heavy & General Laborers
TLX61	ASEA/ AFSCME Local 52
00580	CareFirst Inc. BCBS of Maryland
TPC08	Hawaii- Western Management Group (HWMG)
TPC11	South Carolina Healthy Connections

Digital attachments can now be added to electronic claims submitted to the following payors:

PAYOR ID	PAYOR NAME
TLU43	Regence Blue Cross Blue Shield of UT
CKAZ1	Medicaid of Arizona
CBIA2	Blue Cross Blue Shield of Iowa (Wellmark)
00580	CareFirst Inc. BCBS of Maryland

eEOBs can now be received for electronic claims submitted to the following payor:

PAYOR ID	PAYOR NAME
5LX049	Prime West Health

DENTRIX® eEOB
DENTRIX® Eligibility Verifications

Automated and on-demand electronic eligibility verifications can now be received from the following payors:

PAYOR ID	PAYOR NAME
16117	RMSCO
53011	National Association of Letter Carriers/ NALC
54763	AmeriHealth Administrators
55204	Health Now NY
57604	Aetna Affordable Health Choices (SM)-SRC
CBC01	Capital Blue Cross (CBC)/ Blue Cross Dental (MD)
CDOK1	Delta Dental of Oklahoma
CKWA1	Medicaid of Washington
CX061	Lincoln Financial Group
CX076	Administrative Services Only (ASO)
CX088	Surency Life and Health
CX043	EBS Benefit Solutions
HMSA1	(HMSA) Hawaii Medical Services-Commercial
TLU51	Central OA Teamsters Health & Welfare Fund
TLW33	Western PA Teamsters Fund
TLX23	National Automatic Sprinkler Industry
TLX24	Health Benefit Claims Dept.
TLX61	ASEA/ AFSCME Local 52
WT017	Unum Dental Plan

The entire list of electronic payor connections is available at http://www.dentrix.com/products/eservices/eclaims/payor-search.aspx. You can search for specific payors or download the complete payor list.

For more information on these new payors or any of the services listed above, contact eServices Customer Support at 800-734-5561.

DENTRIX®

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.

Scheduling

Access Appointments from the Treatment Planner

Did you know you can access patient appointments from the Treatment Planner? This makes scheduling chair-side appointments easy! In the Treatment Planner, from the **Options** menu, click **Other Appointments**. This opens the Appointment Book as well as the **Family Appointment List** dialog box. From this dialog box you can select a family member and see each person's past and future appointments, as well as procedures included in treatment plans. Click the **Create New Appointment** button and fill in the necessary information to schedule an appointment for the selected family member.
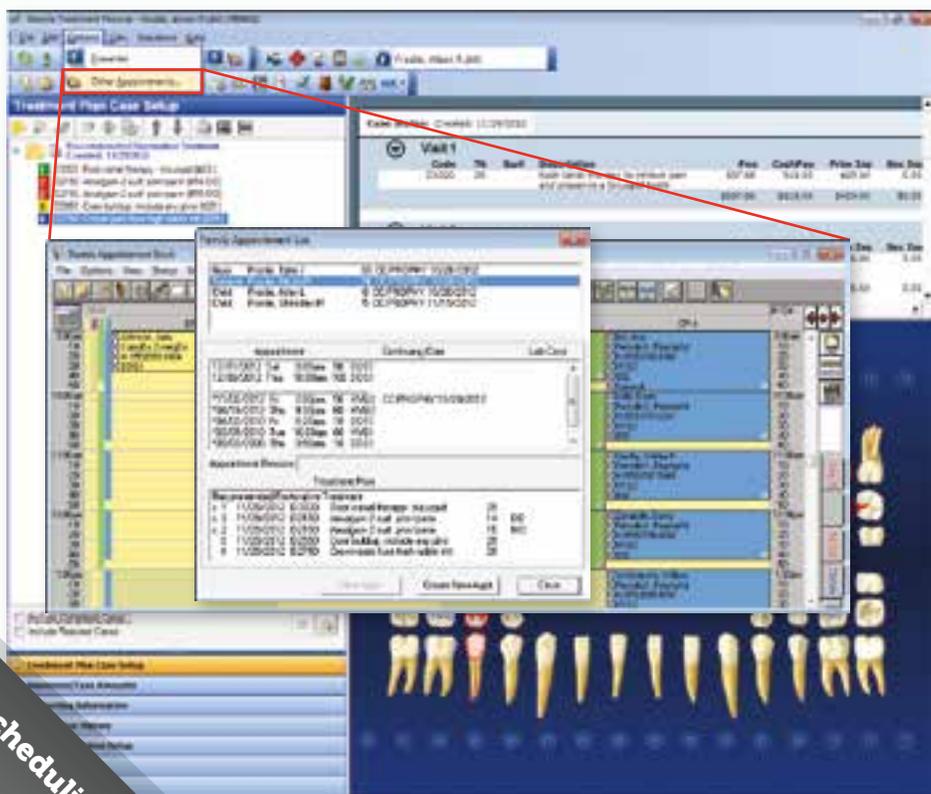
Contact Patients Using the Collections Manager

If you need to identify patients with past-due balances based on account aging, insurance claim status, or last payment date, use the Collections Manager. You can also use the Collections Manager to generate collections letters, send email messages, or set up a payment agreement. For more information, see the Collections Management webinar recording in the Dentrix Resource Center.

Generating the Day Sheet Report by Entry Date or Procedure Date

Did you know you that in addition to generating a Day Sheet Report based on a date range, you can specify if you want the report to reflect either the Entry Date or Procedure Date? While the entry date and procedure date for a transaction are usually the same, if a procedure was back-dated the dates will differ, so there may be times when you want to specify which date you want the report to use. For more information, see the Generating Key Reports tutorial in the Dentrix Resource Center.
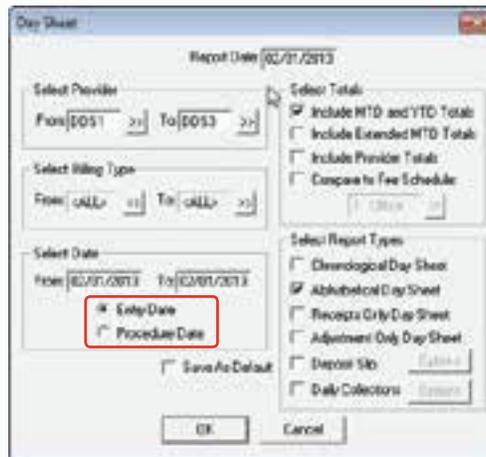
Reduce Rejected Claims

Insurance billing experts say that a short explanation of why treatment was performed can make all the difference when insurance carriers are considering whether or not to cover a procedure. You can add these notes in the **Remarks for Unusual Services** box on the insurance claim. Remember to keep notes short and simple. Only include information that supports the treatment decision. For more information, see the Dentrix eNewsletter article titled Reducing Claim Denials with Claim Remarks at www.dentrix.com/articles/content.aspx?id=301.

Tips &Tricks

View Future Family Appointments on the Family Walkout Statement

The Family Walkout Statement is a printed record of the treatment the family had done that day, including the charges and the patient/family balances. It can also show all of the family's future appointment dates. This can save time and money by not having to write all that information on separate appointment cards.

Use PowerPay to Collect Recurring Payments

Are you using PowerPay to collect payments from patients on a payment agreement? Then why not set up recurring charges (called consents) so a patient's credit card is automatically billed at designated intervals. For more information see article #59818 in the Dentrix Resource Center knowledgebase.

Updating Scheduled Production

It's the start of a new year! It may be a good time to look at the fees you are charging for procedures. Once you have updated your office fee schedule, you can use the Update Scheduled Amounts on Appointments feature to update the fees in your scheduled appointments without having to edit appointments individually. The Update Scheduled Amount on Appointments feature lets you select a starting date for the updated fees to take effect. The Update Scheduled Amounts for Appointments feature works with Dentrix G4 Productivity Pack 7 or higher. To access this feature, from the Appointment Book click **Options > Update Scheduled Amounts**. For more information about updating scheduled amounts or updating your office fee schedule, see articles #47709 and #34608, respectively, in the Dentrix Resource Center knowledgebase.

HAVE A
WINNING SEASON

Jim Philhower, Director of Dental Leadership & Development
Tammy McHood, Senior Product Manager

10 Plays to Help You Reach Your 2013 Goals

How often do our long-term goals take a back seat to our more immediate needs? On a daily basis we prioritize urgent over important as emergency patients take time from scheduled appointments, and an unexpected twist in a procedure causes a ripple delay throughout the day. While this can never be completely avoided, prioritizing the big picture is critical to reaching your goals. When the final two teams meet in the NCAA Championship, do you think they start preparing the night before? Cramming on game tapes and research, putting together last-minute plays? Not if they expect to win. The best teams have done their research well in advance and created plays tailor-made for this game. They know the strengths and weaknesses of every player and have planned, prepared, and practiced to win this game. You can do the same by approaching your 2013 goals with the same level of dedication and preparation.

Dentists face many business challenges as they set their practice goals for 2013. The number one concern for dentists today is not enough new patients. Offices are also seeing fewer patient visits and fewer patients with dental benefits. We also see an increase in managed care (PPO participation). Eighty percent of all insurance plans sold last year were PPOs. The result is a declining reimbursement rate leading to less cash flow, higher overhead, and increased stress for dentists as business owners. Dentists will need to increase their focus on internal marketing and brand differentiation to attract new patients and combat these new managed care challenges.

The good news is many of the answers to these challenges can be found in your practice today. Here are 10 "plays" you can include in your game plan to help you reach your practice goals for 2013.

1 Active Hygiene Patient Analysis

One of your focuses should be your hygiene department. Approximately 25-40 percent of all practice production should be coming from your hygiene department, and 75-80 percent of doctor production should originate from hygiene visits. Yet in too many cases just 50 percent of active patients are currently in the practice's continuing care program. If hygiene visits are not what they should be, implement a Total Health educational program to improve your continuing care statistics. This type of oral/systemic information motivates patients not just to maintain regular dental visits but also to accept recommended treatment. To learn more about the Total Health program go to www.totalhealthlearning.com.

The Dentrix Practice Advisor Report can show you how many active patients have been in your hygiene department in the last 12 months. To run this report, from the **Analysis** menu in the Office Manager, click **Practice Advisor**. Click **Practice Advisor** Report. In the **Practice Advisor Report** dialog box, select the dentists, hygienists, and desired options for your report. Make sure you select **Continuing Care** and **All** under **Select CC Types**. Click **Preview**. When the report is finished generating, the **Patients with CC Visit within last 12 months** statistics on page 3 of the report will let you know how many (and what percentage) of your patients have had a continuing care hygiene visit in the last 12 months (Figure 1).

A highly effective hygiene department will be one of your best sources of

Figure 1 The Continuing Care section of the Practice Advisor Report.

new patient referrals also. We'll discuss that in a moment.

2 Perio Review

The next step in your hygiene analysis could be a closer look at the percentage of periodontal procedures your office is currently performing. According to the AAP and ADA, 75-80 percent of the adult population has some form of periodontal disease. And when asked, most doctors feel that 15-25 percent of their patient base should be in their periodontal therapy program. Yet when we look at the Practice Analysis Report, we typically find that just 3-5 percent of patients are in perio therapy. In most cases the offices are performing the procedures

but are not getting paid for the work because of improper coding and billing of procedures.

You can review your perio procedures as you perform a full code review, as explained in the next tip.

3 Coding Review

A regular review of your coding procedures will ensure that you maximize insurance reimbursement for your patients while increasing your profitability. It can also reveal any areas of coding that could get you into trouble. While you must use the appropriate code for the work you do, there are many coding revisions, additions, and deletions every year. The insurance companies are not going to call your office to let you know that you could have billed and been reimbursed for a procedure or if you used an outdated code that they no longer pay for. A thorough review of the coding used for the most frequently performed procedures in your office could prove beneficial.

The Production Summary Report will help you see which procedures you are actually using (Figure 2). To run this report, in the Office Manager, from the **Analysis** menu, click **Practice**. Click **Reports** from the menu bar to display the **Practice Analysis Reports** dialog box. Under **Select Summary Reports**, select **Production Summary** and **by**

Figure 2 The Production Summary Report.

Proc Code Range. Click **Print** to print the report or **Batch** to send the report to the Batch Processor.

4 New Patient Referrals

Your best source of new patients is your active patient base. Start by identifying your top 20 percent "ideal" patients: they show up on time, accept your treatment plans, pay their bills, and refer their family and friends.

Run the Daily Huddle Report to help you identify these patients. In the Office Manager, from the **Analysis** menu, click

To track referrals, from the Office Manager's **Maintenance** menu, point to **Reference**, and then click **Referral Maintenance**. Use the **Referral Maintenance** dialog box (Figure 3) to add new referrals and manage your referral information.

5 Implementing a Health Checklist

After an initial health history, how often are your patients asked for updates on their overall health? Most offices rely on

Figure 3 The Referral Maintenance dialog box.

6 Radiography Review

Determine how many patients have not received the radiographs they are due for. Put procedures in place to ensure that going forward all radiographs needed are taken. This is critical to operating a minimally-invasive practice—radiographs provide opportunities for early intervention and can reduce the number of invasive procedures needed in the long run.

Tracking key continuing care types such as Pano/FMX is critical as patients come into your practice. This ensures that your team knows who is due for these major X-rays. If one major X-ray is missed a day, this can add up to a $20,000 loss in production every year.

7 Increase Case Acceptance

Place dental problems in the context of total health for patients so they will properly prioritize treatment. Use the Dentrix Treatment Planner to track case presentation and status, so the team can follow up. Most offices have an intraoral camera, but very few use it regularly. Using an intraoral camera on every patient and documenting the findings can increase production 25 percent. Use the Treatment Manager to generate a list of patients with existing treatment plans who meet certain criteria. Then devise a game plan for contacting these patients and achieving acceptance.

For more information on using the Treatment Planner and the Treatment Manager, see those sections of the Dentrix Help.

8 Optimize Scheduling

The Treatment Manager can also help you optimize scheduling by helping you find patients with existing high-production treatment plans and benefits remaining. Perfect Day Scheduling is another tool you can use to optimize your scheduling. It can help you set aside high production periods of the day or week for high-production appointments you identify using the Treatment Manager.

Practice Advisor. Click **Daily Huddle Report**. Select the details and options you want to include, such as **Production**, **Collections**, and **Case Acceptance**, and then click **Preview**.

In your morning huddle, select two of these patients and determine who will ask for the referral. You will find that these patients have friends and family members much like them who could become new patients of yours. Make sure you set new patient goals for 2013, and then put in place the metrics to track and measure your results.

Dentrix allows you to track referrals so you can review them in the Practice Advisor Report (mentioned earlier) on a monthly basis. The Practice Advisor Report helps you see not only how many new patients you have added but also where the referrals are coming from and how many new patients are being referred by your existing patients.

patients to volunteer changes in health, but most patients are not aware of how these changes can or will affect their dental visit. You can use a simple total health checklist during each hygiene visit to ask patients about their overall health, nutrition, sleep habits, and more. This information not only keeps the team up to date on health changes, it also uncovers potential treatment needs and provides an opportunity to educate patients about the value of the dental appointment.

The checklist can also assist you in building referral relationships with physicians as you uncover medical needs that have not been addressed. Finally, it can help you differentiate your practice with a health focus, elevating your practice in the minds of patients. To view a sample health checklist, visit www.henryscheindental.com/healthchecklist.

From the **Options** menu in the Appointment Book, click **Perfect Day Scheduling** to display each provider's time blocks. To move a time block within its respective operatory, drag the time block to the time you want. To increase or decrease the time block's size, drag the bottom border of the time block down to increase or up to decrease the block's size.

9 Improving Collections

Managing collections and insurance payments is a major challenge for any dental practice. There are several tools within Dentrix that can help you reduce bad debt, identify problem accounts, and streamline your insurance management, patient billing and payment, production, and collections processes. Some of these tools include the Citi Health Card, PowerPay, QuickBill, and the Dentrix Collections Manager.

For information on the Citi Health Card, go to www.dentrix.com/products/technology-partners/citi%20health. For information on PowerPay and QuickBill, go to www.dentrix.com/products/eservices/default.aspx.

To use the Dentrix Collections Manager, in the Office Manager, from the **Analysis** menu, click **Collections Manager**. In the **Collections Manager View** dialog box, set the criteria that you want to use for creating a collections list and click **OK**. The collections list appears in the Dentrix Collections Manager window (Figure 4).

10 Balance Fees

Fees should be analyzed annually. While you may not be comfortable with an overall fee increase at this time, there's a good chance at least a few of your fees fall outside the positioning you've created for your practice. Select a percentile for your fees and increase or decrease those that fall outside your selected range. Make sure your fee comparison uses just

your immediate geographic area for the most accurate comparison. (When you have a Henry Schein Practice Analysis performed, this is part of the analysis.)

When you're ready to change your fee schedule, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Auto Fee Schedule Changes**. You can select **Change Fee Schedule** and increase all your fees by a certain percent or dollar amount, or you can select **Copy Fee Schedule To** and create a new custom fee schedule. When you are finished, click **Change**.

If your practice hasn't had a fee schedule analysis in a while, Henry Schein Dental Practice Analysis can help you review your fee schedules and compare them to other practices in your specific ZIP Code. To learn more, go to www.henryscheindental.com/PracticeAnalysisRequest.

This can be a daunting list for many practices as they struggle with how to access and track much of the information above. However, as a Dentrix user, all of the data you need can be quickly and easily extracted from your software. For help organizing and reviewing the information, your Henry Schein representative can input the data into a Practice Analysis. This

analysis can help you easily identify the areas to target in your 2013 plan for hygiene, perio, exams, radiographs, and patient flow. To learn more about practice analysis, go to www.henryschein.com/us-en/sites/wedothat/practiceanalysis.html.

After the initial analysis review, many offices need help monitoring these practice statistics and others to ensure that any corrective steps are working effectively. A Dentrix profitability coach can tailor a program to help you and your team members incorporate best practices into your daily routines. With coaching and monitoring to keep your plan on track, you'll be on your way to meeting your 2013 goals. Visit www.dentrix.com/profitabilitycoaching for more information. **DM**

***

LEARN MORE

To request a Henry Schein Dental Practice Analysis for your practice, go to www.henryscheindental.com/PracticeAnalysisRequest or ask your Henry Schein Dental field sales consultant for one today. To learn how Profitability Coaching can help your practice implement more best practices while using the valuable tools in Dentrix, go to www.dentrix.com/profitabilitycoaching.

Figure 4 The Dentrix Collections Manager.

Get Expert Advice with a Personal Touch

Let our experts show you how to put all the features of Dentrix to work for your practice, and help you identify the reports and performance metrics you should focus on to gain greater profitability.

With Dentrix Profitability Coaching you'll learn ways to:

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- Keep patients coming back
- Collect what you produce
- Increase treatment acceptance rates

- Give more accurate patient estimates
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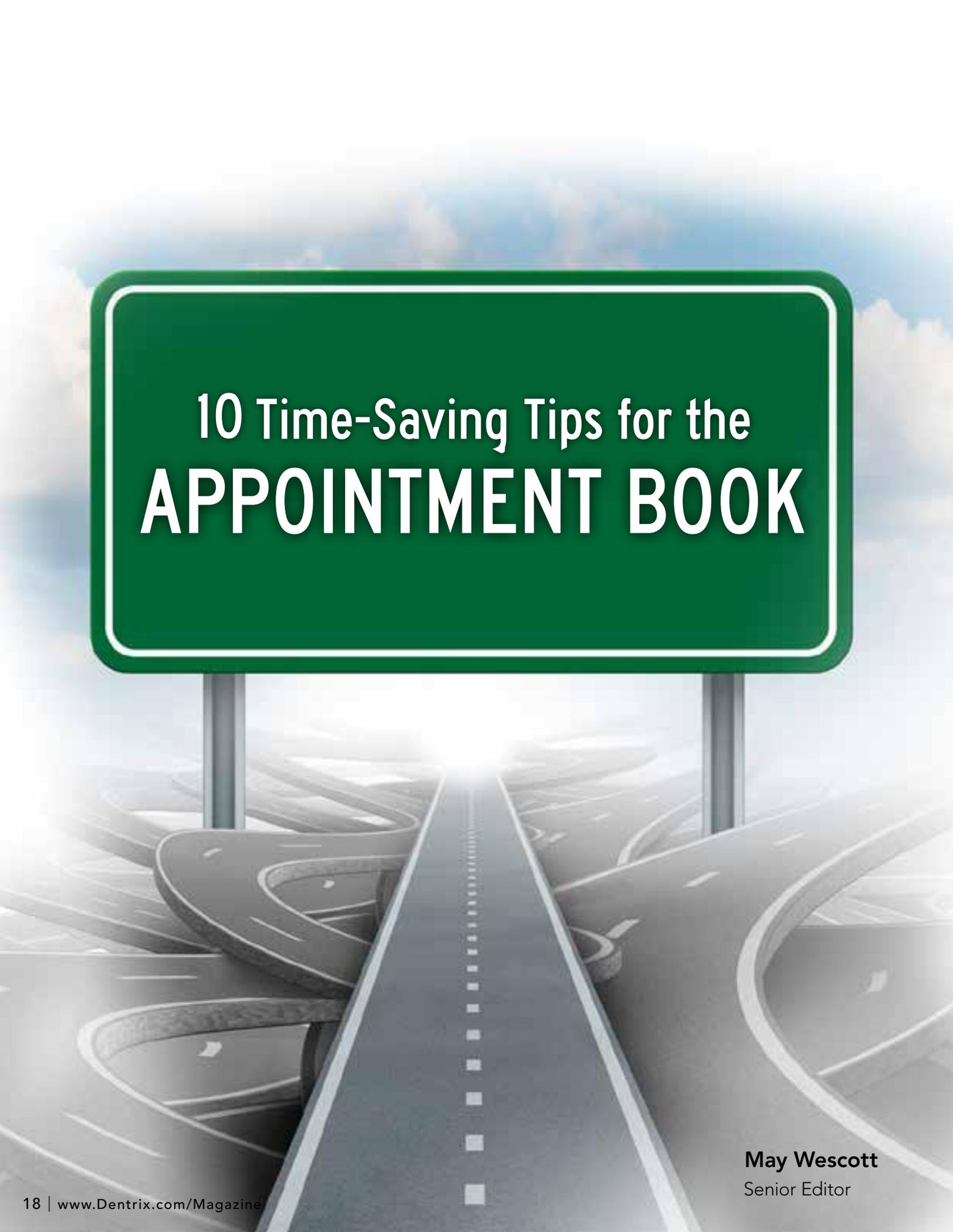
10 Time-Saving Tips for the
APPOINTMENT BOOK

May Wescott
Senior Editor

Take advantage of these 10 time-saving Appointment Book tips to help you keep your day rolling along.

The other day I was on my way to a meeting. Luck wasn't with me, and I had to stop at every stoplight along the way. At the last stoplight, some road construction made it necessary to take an alternate route. The combination of the red lights and the detour made me 20 minutes late.

On my way home, I found a new route with half the number of stoplights and no detours. This shortcut has been saving me time ever since.

During your busy work day you may have similar experiences. You plan your day to be productive and to take advantage of every hour, but along the way you encounter delays and detours that rob you of huge chunks of time.

This article provides some tips to speed up processes and help you avoid some unnecessary delays. These Appointment Book shortcuts are easy to set up and use. Over time, they can make a big difference in your overall productivity.

Information May Be Closer than It Appears

One avoidable delay can be the need to stop what you're doing to run a report or look up some information. Wouldn't it be nice to display that information where you can view it at a glance? The first three tips will show you how you can set up the Appointment Book to access important information quickly and easily (Figure 1).

1 – View Daily Estimated Production Amounts

If you're working in an office that is scheduling for production, you need to know how you're doing in meeting your daily scheduling goals. Dentrix has some great reports to show you detailed information about the ins and outs of scheduled production. But most of the time you may just want to see at a glance if you're hitting your scheduling goals for the day.
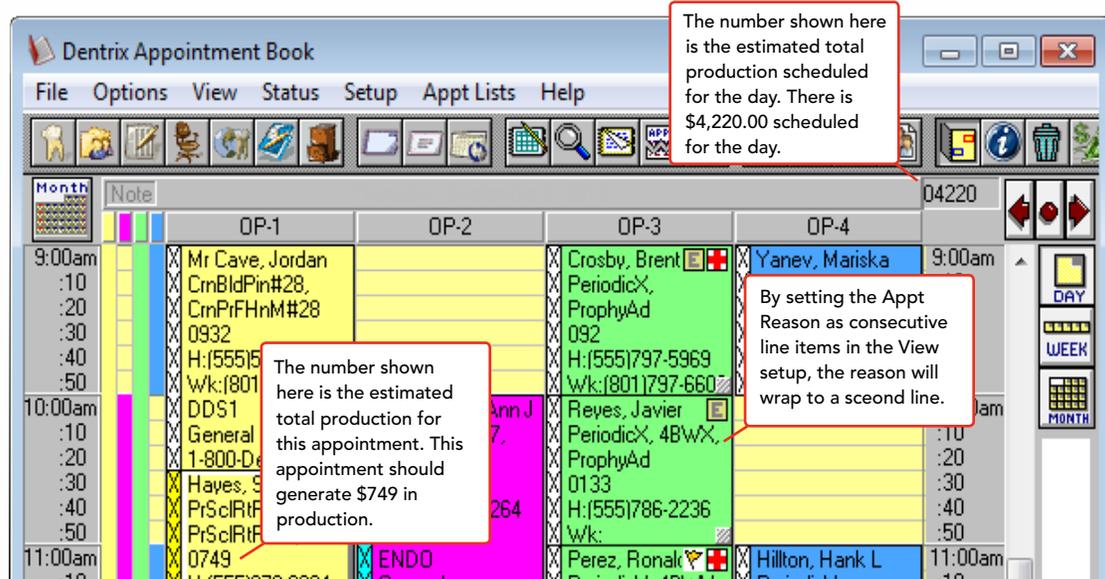
Figure 1 By setting your View options, you can see important production information at a glance.

Dentrix makes it easy. By checking one box in the View setup, you can see your estimated production totals for each day right from the Appointment Book. From the **View** menu in the Appointment Book, select the first view you have set up and click **Edit**.

These Appointment Book shortcuts are easy to set up and use. Over time, they can make a big difference in your overall productivity.

In the **Select View** dialog box select **View Amount**. Click **OK** to save your changes. (Repeat this process for any other views where you'd like to see total production amounts.)

When you return to the Appointment Book, you'll notice that Dentrix now shows a number above the Time Bar on the right side of your book. That's the amount of estimated scheduled production for the day.

Note: Dentrix adds a 0 in front of the amount so it's not as easy for patients to recognize it as a dollar amount.

2 – View Amounts on Appointments

If you want to see at a glance the estimated production amount for an individual appointment, you can do that in View setup too. From the **View** menu, select the first view you have set up, and click **Edit**. In the **Select View** dialog box you'll see the **Appointment Display Info** customization fields. Choose which line you'd like to use to view estimated production amounts and then set the field for that line to **Amount**. Click **OK** to save your changes. Repeat this process for all other views where you'd like to see production amounts.

When you return to the Appointment Book, you'll see the estimated production amount for each appointment on the line you indicated.

3 – Wrap the Text of an Appointment Reason to another Line

If displayed appointments appear small because you're viewing multiple operatories or a patient has multiple procedures attached to the visit, the entire appointment reason won't show on the face of the appointment. You can give yourself some more room to see those reasons by wrapping the appointment reason to the next line. To set this view up, from the **View** menu, select the first view you have set up and click **Edit**. In the **Select View** dialog box, you'll see the **Appointment Display Info** fields. Set up your Line fields so that the **Appt Reason** field uses two consecutive lines. For example, if **Appt Reason** is currently Line 2, change Line 3 to also be **Appt Reason**. The fields must be in consecutive order for the wrap function to work.

Remember that all three of these view settings can be turned on or off with the different views that you set up. As a bonus tip, don't forget that you can switch between your views by pressing the function keys (F1, F2, and so forth) on your keyboard.

One Click is All It Takes

Detours can be especially frustrating. Sometimes when you're in the middle of scheduling a patient, you have to detour from a scheduling task to look up information in a patient's Ledger or Family File. These next tips will give you some fast work-arounds to get you speeding back on your way—with just one click.

4 – View Medical Alerts and Appointment Notes with a Single Click

You're looking at an appointment that has a symbol on it indicating a medical alert or an appointment note. Do you want a quick way to see what's going on with that patient? Click once on the symbol to open a dialog box that shows you any medical alerts for the patient, the appointment note, and anything entered into the Patient Note (Family File) and Guarantor Note (Ledger) for the patient.

Note: You can also click on other appointment symbols including patient alerts, insurance eligibility, and lab cases to see related information.

Figure 2 Missed appointment data is shown in the Family File.

5 – View Account Information

In the middle of scheduling Brent Crosby's appointment, he asks you if his wife has a hygiene appointment scheduled soon, if you've received his last payment, and if you have his correct phone number. Wouldn't it be nice if you could look up the answers to those questions without having to exit out of the appointment you're scheduling?

If you've already started entering the information in the **Appointment Information** dialog box, just click the **More Info** button. The **More Information** dialog box appears and gives you summary information about family members, appointments, continuing care, balance information, and personal information.

You can switch between members of the family by clicking a name in the **Family** list. After you select another name, all the information in the dialog box updates to reflect the information for the patient you just selected.

You can switch to the **Ledger** with the patient already selected by clicking Ledger at the bottom of the dialog box. The Ledger opens without you having to exit out of your appointment.

Best of all, when you close the **More Information** dialog box, you return to the **Appointment Information** dialog box, with all the information you've entered still in place.

6 – Keep Track of the Number of Missed Appointments

John Walker calls and cancels… again. You know he's done this several times before, but you're not quite sure how many times it's happened. Don't worry, Dentrix keeps track of this for you. Every time you break an appointment for a patient by clicking the **Break Appointment** button, Dentrix updates the **Missed Appointment** counter in the Family File and notes the date the patient was originally scheduled. It also adds an entry indicating a broken appointment (including the appointment reason) to the Office Journal. A single click updates all that information automatically (Figure 2).

Note: If you want to move a patient to the Unscheduled List without counting it as a broken or missed appointment, you can do so by double-clicking the appointment. From the Appointment Information dialog box, click the Wait/Will Call button to move the appointment to the Unscheduled List.

Relief from Rescheduling Gridlock

One thing that can really cause a jam in your day is getting cancellation calls. Here are a couple of tips that can help.

7 – Drag and Drop Scheduling from Lists

You're making phone calls from the Unscheduled List to fill some open time in your Appointment Book. Wouldn't it be great if you could just drag the patient from the list to an open appointment time? With G4 Dentrix PP7 and later, you can—and not just from the Unscheduled List. You can use this functionality from any of the lists accessed from the **Appt Lists** menu, including the ASAP List, the Pinboard List, and the Appointment List. Just click on a patient's appointment while viewing a list, and then drag the appointment to an open time in your book (Figure 3). Presto, the appointment has been moved off of your list and rescheduled.

8 – Reschedule the Whole Family

Jan Simmons calls and lets you know that the kids all have the stomach flu and won't be able to make their appointments tomorrow. You appreciate the warning, but rescheduling all five of those appointments isn't going to be easy. Dentrix can make it easier by helping you to move all those appointments to the Pinboard with just two mouse clicks.

To move all family appointments for a single day to the Pinboard, right-click one of the family members' appointments, point to **Move to Pinboard**, and then click **Family Appts for Displayed Date**. Dentrix grabs all of the appointments for anyone in the family scheduled on that day and moves them to the Pinboard. The appointments will stay on the Pinboard until you reschedule them.

Note: You can use this same process to move all the appointments for an operatory, a provider, or the whole day.

9 – Purge Unscheduled Appointments

Your office has been using the **Break Appointment** button correctly for the last two years. After breaking appointments, staff members make a
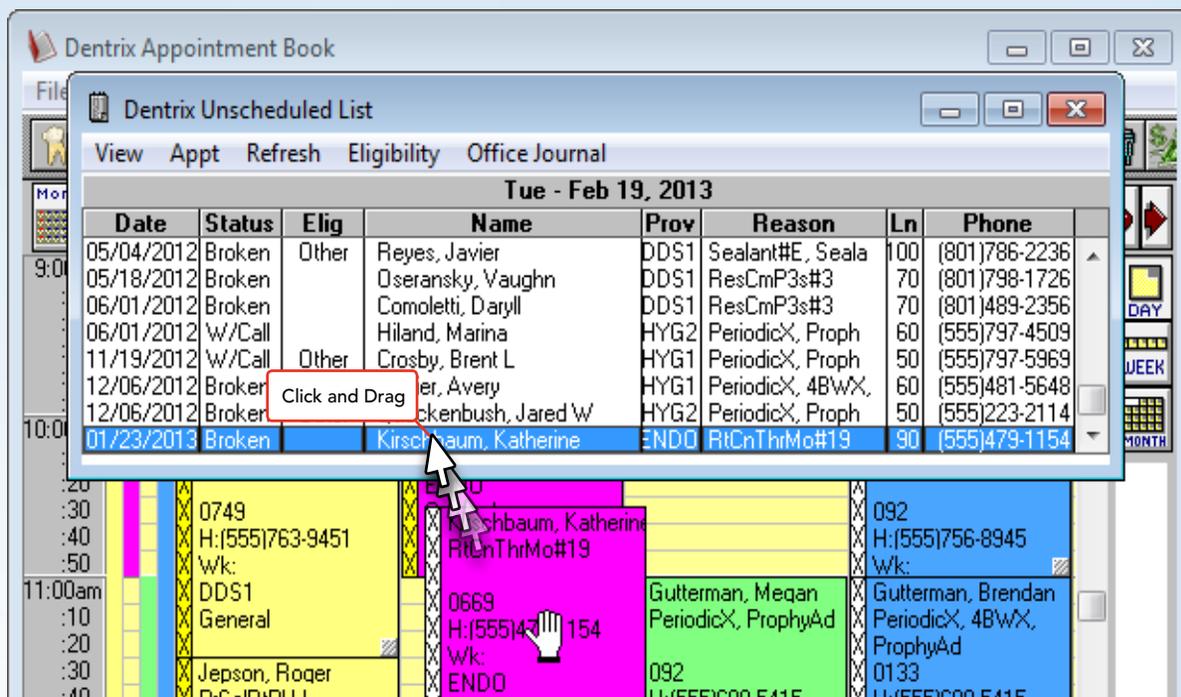
Figure 3 Click and drag appointments from Dentrix lists to open times in your Appointment Book.

good effort to get those appointments rescheduled and off the Unscheduled List, but there are some appointments that just never get rescheduled. After two years, those unscheduleable appointments have added up—and are cluttering up your list.

Fortunately, you can remove all those old unscheduled appointments by running a simple utility. From the Unscheduled List menu, click **Appt** then select **Purge Appointments**. Enter a **Cut Off Date**. All unscheduled appointments dated before the cut off date will be removed from the list.

Note: It's probably a good idea to establish a cut-off rule for your office. For example, you might decide that the cut-off date will always be one year out.

Customization to Grease the Wheels

When you first started using Dentrix, your trainer probably walked you through customizing a lot of the settings for your Appointment Book. But time may have changed some of your needs (or the ADA may have changed some codes), and now those settings are no longer helping you—they're slowing you down. Maybe it's time to take a look at some of those customizations and tune them up a bit.

10 – Customize the List of Initial Appointment Reasons

It's been driving you crazy. Ever since the ADA released their new code set, your fluoride appointment reasons are all wrong. Every time you have to schedule an appointment with a fluoride treatment, you have to either add code D1208 to the patient's treatment plan or go through the long process of selecting the code by clicking the **Misc** button. Fortunately, this is easy to fix by customizing the list of initial appointment reasons. Through customization you can both remove codes you don't use (like expired ADA codes) and add codes that you do use.

To customize the list of initial appointment reasons, go to the Office Manager. From the **Maintenance** menu, point to **Practice Setup**, and then click **Definitions**. From the **Definition Type** list, select **Appointment Reasons**. Add, edit, or delete the listed reasons. Click **OK** when you're done making changes.

You're still going to have days where it feels like you've spent the last eight hours stuck in traffic, but by using these shortcuts you'll feel like you're in the fast lane rather than gridlock. **DM**

LEARN MORE

To learn more about the Appointment Book, see the Appointment Book section of the Dentrix Help. You can also visit the Dentrix Resource Center to view the Appointment Book on-demand training titles. See "How to Learn More" on page 2 for instructions on accessing these resources.

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Discover These Dentrix Keyboard Shortcuts

Learn these time-saving keyboard shortcuts in Dentrix.

■ **Dayna Johnson** | Certified Dentrix Trainer

One of the things I love about Dentrix is that there are several ways to accomplish the same thing. For example, every Dentrix module has a toolbar with icons you can click to accomplish common tasks. If you prefer menus, you can perform these same tasks using the menu bar at the top of each module. Many Dentrix tasks are also available on shortcut menus that appear when you right-click certain areas in the Dentrix modules. What you may not know is that Dentrix also provides a number of time-saving keyboard shortcuts that give you quick access to common tasks.

Keyboard shortcuts are a great time saver for one simple reason: your fingers spend much of their time on the keyboard. With keyboard shortcuts, there's no reaching for the mouse, moving the pointer, and clicking. You simply press one or two keys that are literally at your fingertips.

This article explores some of the little-known keyboard shortcuts that you can memorize and begin using today.

Office Manager Shortcuts

The Dentrix Office Manager offers keyboard shortcuts that let you quickly jump to the beginning or end of a multi-page document in Print Preview. Select a multi-page document in the Batch Processor (such as a fee schedule) and press Alt+F, and then I to display the Print Preview window. Pressing Shift+End takes you to the end of the document; pressing Shift+Home takes you to the beginning of the document.

Patient Chart Shortcuts

After selecting a patient in the Patient Chart, you can print that patient's dental chart by pressing F3. Specify any print options you want and click **OK**.

With Dentrix G5 and later, the Patient Chart module has an enhanced Refresh feature that reloads any changes made to setup configuration, such as added or edited procedure codes, multi-codes, provider information, medical cross-coding, and Clinical Note Templates. To refresh these settings, simply press F5.

Appointment Book Shortcuts

The Dentrix Appointment Book offers several keyboard shortcuts. For starters, you can define up to 12 custom Appointment Book views that are automatically assigned to the function keys F1 through F12. To do this, click **View** on the menu bar, and then click **New** to display the **Select View** dialog box. The first custom view you create is automatically assigned to the F1 function key, the second view you create is assigned to F2, and so forth. With each custom view, you can specify which providers, operatories, days, times, and appointment details appear in the Appointment Book. After your views are created, to change between views, simply press the corresponding function key, F1 through F12.

Here's another Appointment Book keyboard shortcut. To quickly switch to the Appointment Book Day View, press Ctrl+D. To switch to the Appointment Book Week View, press Ctrl+W.

Menu Bar Shortcuts

The Dentrix menus at the top of each module provide easy access to most software tasks. For the Dentrix tasks you perform regularly, you may find that it's faster to access them from the keyboard by pressing the Alt key while pressing the underlined letter in the menu title (usually the first letter), and then pressing the underlined mnemonic letter in the menu option. For example, from the Appointment Book, to open the Family File, press Alt+F, and then F again. To open the Ledger, press Alt+F, and then L. To print the current Appointment Book View, press Alt+F, V, and then Enter. To create a Daily Huddle Report, press Alt+F, H, and then Enter.

You can use the keyboard to access menu items in the other Dentrix modules also. For example, if you have the Patient Chart open, press Alt+O, and then O again to open the Perio Chart; press Alt +O, and then T to open Treatment Planner.

F2 Select Patient Shortcut

In the Family File, Patient Chart, and Ledger modules, you can press F2 to quickly display the **Select Patient** dialog box, where you can select a patient from the Dentrix database. In the Appointment Book, because F2 is reserved for custom views, use Shift+F2 to display the **Select Patient** dialog box.

Help Shortcuts

In nearly all of the Dentrix modules, pressing F1 displays the Help window where you can find helpful information on using Dentrix. With the Help window selected, you can use the Up Arrow and Down Arrow keys to scroll through the Help books on the **Contents** tab. You can also use the Right Arrow key to open a Help book and the Left Arrow key to close a Help book.

If you use the **Search** tab to search for certain words in the Dentrix Help, those keywords are highlighted in the Help topics. To turn off the search highlights, you can simply press F5. (You may want to do this before you print a Help topic.) To print a Help topic, you can use the standard Windows keyboard shortcut Ctrl+P. **DM**

Dayna Johnson, founder and principal consultant of Rae Dental Management, helps dental offices improve patient care, increase collections and reduce staff headaches by implementing efficient management systems. With 18 years experience in the business and technical side of dental offices, Dayna's passion for efficient systems is grounded in both personal understanding and professional expertise. Dayna can be reached at dayna@raedentalmanagement.com or visit her website at www.raedentalmanagement.com.

Keep Communication Open with Two-Way Chat

Use the two-way chat feature to have a real-time text message conversation with a patient who has questions or needs to reschedule.

■ **Andrea Gallimore** | Dentrix eServices Coach

Brent Crosby is having one of those days. He's been running behind schedule ever since he got up this morning and he's stuck in a meeting with a client who won't stop talking. Brent is wondering how he's going to get to everything he has to do today when he gets an automated text message from your office reminding him of his hygiene appointment this afternoon (Figure 1).

In the old days, Brent might just have blown off that appointment. He doesn't have time to get there on schedule, and he's stuck in a meeting so he can't call your office and talk to someone about it. But, with the Communication Manager's two-way chat feature, he can deal with his scheduling issue without leaving his meeting, allowing him to give your office plenty of notice about his scheduling issues and allowing you to make sure that he gets rescheduled.

Figure 1 With the two-way chat feature, patients can reply to your automated text message reminders and carry on a conversation with you through text.

Text messaging is fast, convenient, and nearly universal. In fact, on average people read and respond to text messages in less than one minute. This makes texting an ideal method for sending quick reminders to patients before their appointments.

The Communication Manager takes it one step further by allowing your team to have a real-time text message conversation with a patient who has questions or needs to reschedule. If you have enabled the non-confirmation text message

Figure 2 By clicking on the pop-up alert, you launch a chat window which allows you to answer patient's questions or concerns without a phone call.

notification in eSync, when a patient replies to a text-message appointment reminder with any response other than a confirmation, your front-office team will see a message pop up on their computer screens. A simple click on the message allows them to reply to the response and continue the conversation in a new chat window (Figure 2).

If you've stepped away from your desk and missed the pop-up window, you can easily review any messages you may have missed by viewing them in your email inbox or opening a Correspondence Report (Figure 3) in eCentral. To reply to a message you missed, select the **View Text Message Reply** link in the email message and the chat window opens and displays the text message received. Or to reply to the patient from the Correspondence Report, select the **Text Message**

Received tab. From there you can view the text message received from the patient by clicking the message text highlighted in blue. In both cases, this launches the chat window and allows you to type a reply.

An important part of quality care is the ability to respond promptly and efficiently to patient questions and needs. An important part of keeping your practice operating in the black is making sure patients remember their appointments so you don't have empty chairs. Now the eCentral Communication Manager gives the front-office an easy way to do both with the two-way chat feature. **DM**

LEARN MORE

To learn more about the two-way chat feature, see the What's New in eCentral 3.1 topic in the eCentral help, visit www.dentrix.com/communication, or visit the Dentrix Resource Center to view the Sending Text Message Appointment Reminders article. See "How to Learn More" on page 2 for instructions on accessing these resources.

Figure 3 If you miss a pop-up message, you can review the messages that have come in from the Correspondence Report.

Make It Personal.

Build your success — one personal connection at a time.

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

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

And of course, this kind of automated two-way communication leads directly to a more satisfying patient experience, less work for your front office staff and a healthier bottom line.

Learn how Communication Manager can transform the way you communicate and interact with your patients.

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Using eClaims to Improve Cash Flow

Learn how submitting electronic claims and attachments can help you get paid faster and maintain your cash flow.

■ **Matthew Krieger,** DMD | Founder and CEO, Million Dollar PPO

For all practices, keeping accounts receivable (A/R) low is a fundamental part of running a profitable business. In most practices, a significant portion of the overhead for each procedure is realized at the time that the production occurs. Rent, utilities, salaries, taxes, and fees for perishable supplies are typically due every month regardless of when, and how much, production occurs. Other expenses, like lab fees and supplies, are usually incurred within 30 to 60 days of production. If fees are not collected in a timely manner, there is a strong likelihood that the overall cash flow of the practice will be affected. Cash is critical to a practice's ability to operate and to excel.

In order to have the cash you need to run your business, you need to collect as much money as possible as close as possible to the time of service. When you're dealing with patients, create and enforce a sound, written policy that describes the cost of the procedure, the anticipated insurance contribution, and the patients' out-of-pocket obligation. A written agreement between the doctor and the patient is an absolute necessity that will allow for simplified, stress free collection of the patient's up-front, out-of-pocket expense.

For those practices that participate with insurance companies and/or accept assignment of benefits, collection does not stop at the patient. A portion of the cost (sometimes more than 50%) must then be collected from an insurance company. One of the fundamental beliefs I incorporate in my Million Dollar PPO Coaching/Consulting firm is "profitability through efficiency," and there is no more efficient way to collect money from insurance companies than through the effective use of electronic claims and attachments.

Figure 1 The Fast Checkout button in the Ledger allows you to generate a walkout statement and create and send an insurance claim with one click.

When you're working with claims that don't requiring additional documentation, like hygiene visits or basic restorative procedures, Dentrix allows you to generate a walkout statement for the patient, create an insurance claim, and send that claim electronically with one click of the Fast Checkout button in the Ledger (Figure 1). While in the past this claim would be printed, signed, and mailed to an insurance company, with Dentrix eClaims it can now be submitted immediately. You can expect reimbursement from insurance companies for hygiene visits and basic restorative claims that were submitted electronically in less than 14 days.

Sending electronic claims is not limited to just hygiene visits and basic restorative procedures. Submitting electronic attachments along with your electronic claims can allow for a more rapid reimbursement from insurance companies. Periodontal, oral surgery, and endodontic procedures, along with major restorative procedures such as crowns and onlays,

can be submitted electronically with electronic attachments. Traditional paper claims for similar procedures can take up to 8 weeks to be paid, while you can expect payment time of less than 30 days when you send electronic claims with attachments, such as digital X-rays and intra-oral images. And Dentrix helps improve the consistency and accuracy of the submission process by reviewing the claims for mistakes before sending them to the insurance company electronically, thereby reducing errors and the need for re-submissions that would extend the reimbursement timeline.

To add electronic attachments to a claim, from an insurance claim, double click the **Claim Information** block to open the **Insurance Claim Information** dialog box (Figure 2). In the **Attachments** group box, indicate the number of
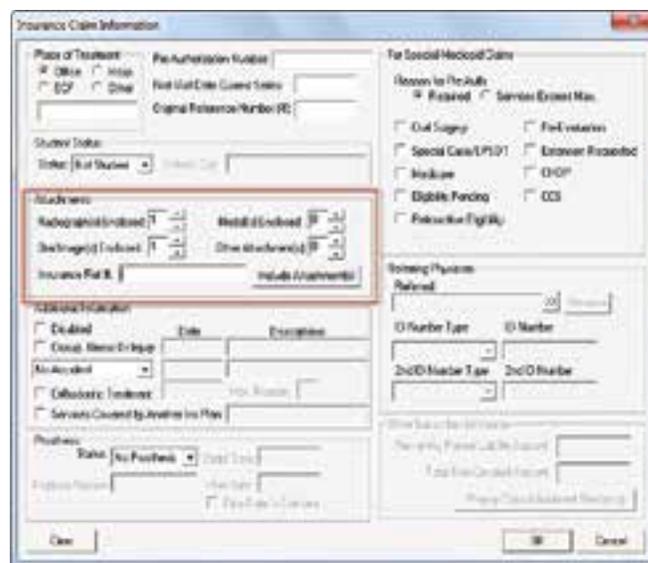
Figure 2 In the Insurance Claim Information dialog box you can add important information to a claim, including electronic attachments like radiographs and perio charts.
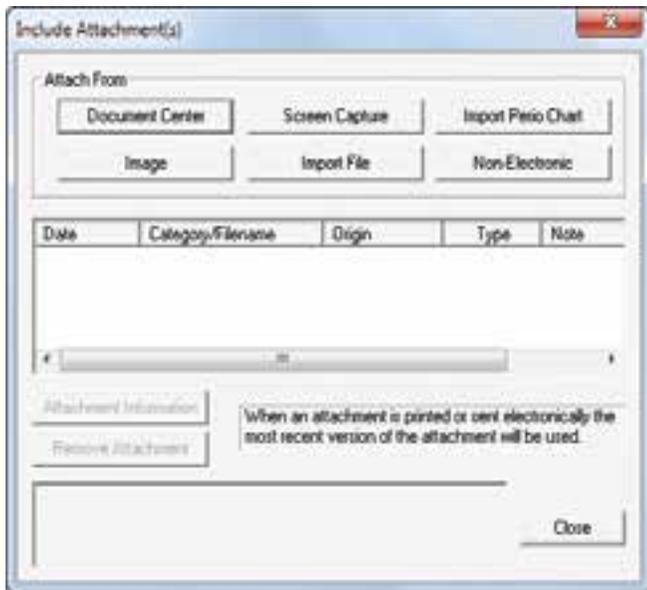
Figure 3 You can attach files from the Document Center, Perio Chart, and Dexis Image to your claim. With Dentrix G5, you can also capture and attach an image of any file on your computer.

radiographs, oral images, and other attachments enclosed and click **Include Attachments** to open the **Include Attachments** dialog box (Figure 3). You can then attach files from the Document Center, Perio Chart, DEXIS Imaging Suite, or the hard drive on your omputer. With Dentrix G5, you can also use the Screen Capture tool to capture and attach an image of anything being displayed on your computer.

In addition to speeding up the reimbursement timeline and improving the accuracy of claim submissions, sending electronic claim attachments can also decrease the chances that a claim will be denied. Many times what we as clinicians see in the mouth cannot be seen at all on an X-ray. In some cases, major problems requiring significant restorative procedures only show up as minor issues on a radiograph. If given the choice between denying a claim that includes extensive and illustrative documentation submitted digitally or denying a paper claim with unclear duplicated copies of traditional radiographs, an insurance company will more likely deny the claim with the unclear documentation.

In my practice we send electronic claims and claim attachments. We have created a claim submission checklist for all restorative, periodontal, oral surgery, and endodontic claims to ensure that the following are sent with every electronic claim:

- Dentrix electronic claim
- DEXIS digital X-ray (pre- and post-op)
- DEXcam intra-oral photos (pre-op, intra-op, and post-op)
- Necessary periodontal charting imported from Dentrix Perio Chart
- Narrative (can be pre-loaded into the Office Manager by clicking **Maintenance > Practice Setup > Custom Notes > Claim Remarks Setup**)

As part of our claim submission process we also generate an insurance aging report on the first day of every month, which helps us easily track our outstanding claims and insurance dollars. To run the Insurance Aging Report in Dentrix, from the Office Manager click **Reports > Ledger > Insurance Aging Report**.

Implementing and following this streamlined, convenient system of sending electronic claims and attachments has allowed my practice to improve its cash flow and maintain an A/R of less than 5% at 30 days. The time that we save through such an efficient process allows us to utilize our available cash for training, education, and expansion. Our efforts can be focused on improving our practice for the benefit of our patients instead of chasing after money just to pay our bills. **DM**

Dr. Matthew Krieger graduated from New Jersey Dental School in 1998. He launched his own practice in 2003 and built it into a full-time practice in just one year. Dr. Krieger has collected more than one million dollars in each of the last five years and has grown his practice by 30 percent annually—all while working only in 3.5 days per week, maintaining an overhead of 57 percent, and participating in PPO insurance plans. Dr. Krieger is the founder and CEO of Million Dollar PPO, a dental practice management coaching and consulting firm. He also lectures on practice management and CAD/CAM dentistry. Dr. Krieger is an active member of the ADA, AGD, AACD, ACE, and the Crown Council and has earned over six hundred hours of continuing education. For more information about how Million Dollar PPO Coaching and Consulting can help your practice, visit their website at www.milliondollarppo.com.

LEARN MORE

To learn more about sending electronic claims and claim attachments, visit www.dentrix.com/products/eservices/eclaims. To learn more about claim attachments, see the Sending Claim Attachments Overview topic in the Dentrix Help. You can also visit the Dentrix Resource Center and view the eClaims tutorial or download the Submitting Insurance Claims and Attachments Electronically getting started guide. See "How to Learn More" on page 2 for more information about accessing these resources.

> **If fees are not collected in a timely manner, there is a strong likelihood that the overall cash flow of the practice will be affected. Cash is critical to a practice's ability to operate and to excel.**

A Patient's Perspective of Your Technology

Take a look at the technology in your office and use these tips and suggestions to see where new technology might benefit your practice.

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

Marketing your dental practice is critical to attracting new patients. Using technology in your reception, waiting, and clinical areas is equally important in keeping those new clients once your marketing has drawn them in. Today's patients are more aware of technology and expect an office to be high-tech. Technology makes a difference in why a patient selects one dentist over another.

Patients perceive a high-tech office as providing a higher level of care—whether it's true or not. Does the technology in each area of your practice, including the waiting and check-in areas, accurately reflect the service your patients receive? Dr. John Jameson suggests you look at your practice through the eyes of your patients (www.jamesonmanagement.com). Would you choose to be a patient of an office that looks like yours?

That Picture is Beautiful

Many practices invest heavily in treatment area technology while neglecting to update technology in the reception area. Your treatment area is a state-of-the-art facility providing exceptional patient care, but its effect can be dampened if your patients' first view of your practice is a timeworn reception area. Your patients, for example, will appreciate high-definition television with engaging content and digital programming.

In addition, modern computer and phone systems make a great impression at check-in. A computer running multiple monitors makes workers more productive. For example, your scheduling coordinator will be more effective by processing patients on one computer monitor while continuously checking appointments on another.

Your Printing Should Be Crisp

Don't underestimate the value of the printed page, even as you go paperless. A patient treatment plan printed on bright white 28-pound paper using a color laser printer has the advantage of crisper, higher-quality print, while having a lower price per page than traditional inkjet devices. Replacing your aging printers with a networked color laser printer lets your patients walk away with proof that you have a modern practice. For under $800, you and your patients will be amazed by the quality of X-rays and photo prints you produce, and your team will be more productive due to the increased printing speed.

A Lean, Green, Paperless Machine

A key initiative for modern practices is shifting to paperless processes. Going paperless not only helps define your practice as modern, but it also improves the efficiency of check-in and scheduling. The latest page scanners are now small enough to sit in front of a keyboard at each office workstation. This reduces logjams at shared units and allows staff to scan documents, insurance cards, and driver's licenses directly into a patient's file without leaving their desk or waiting in line behind a coworker.

Is Your Operating System a Teenager?

Windows XP was launched nearly 12 years ago. Tech-savvy patients can tell if you are using outdated computer systems—but more importantly, so can your software and digital dental technology. Take advantage during your next PC refresh to move to more current Microsoft operating systems, such as Windows 7. Now that Windows 8 has released, you may have wondered about upgrading to the latest Windows version. Before you do, consider that there are practical advantages that come along with Windows 7 as well. Taskbar pinning, Aero display, and Shake are all great Windows 7 features that can make work easier. On the other hand, if you're an early technology adopter looking to run Dentrix on Windows 8, Henry Schein will soon be releasing a hotfix to Dentrix G5 that supports Windows 8. Before you upgrade your operating system, make sure that all your hardware and software are compatible with Windows 8, including third-party software (such as imaging software) that you link to through Dentrix. For the latest information on Dentrix and eServices compatibility with Windows 8, go to www.dentrix.com/support/software-updates/g5.aspx.

Take advantage of Henry Schein TechCentral computer experts to update your practice to modern computers and equipment. It will ultimately save you money in productivity and cost less than upgrading individual components in your office PCs.

Fuzzy Pictures and Dirty Mice

Many practices computerized their treatment areas years ago. Walk into your operatory and ask yourself, "Does my technology promote a modern image of my practice?" Television displays have undergone improvements that put them on par with computer monitors. Razor-thin LED TVs with 1080p and HDMI input provide super-bright, crystal-clear images, whether showing broadcast content, patient education or a computer display. Take a look at other equipment— a yellow, aged keyboard or mouse is a good indication that it's time to upgrade to new, durable input devices that are designed to handle disinfectants and that are waterproof enough to run through a dishwasher.

Stand Apart and Get Ahead

Set your practice apart with modern, high-productivity technology solutions. A 36- or 48-month equipment lease allows you to budget for your investment in technology while helping maintain new equipment on a regular upgrade cycle. You will appreciate how simple upgrades to your office technology can dramatically affect how patients perceive your office. Contact Henry Schein TechCentral at 877-483-0382 for professional assistance on every step of your technological journey. **DM**

Demandforce and Dentrix:
Practice Automation Meets Demand Generation

■ **Alina Tatevosyan** | Partner Marketing Manager

Learn how Demandforce integrates with Dentrix to make marketing your practice easy and effortless.

We at Demandforce appreciate your expertise in dentistry and respect your profession by helping you manage several key aspects of your business, such as your online reputation, email marketing, and patient satisfaction. You already use Dentrix to create a digital dental practice, but how are you using other technology to get more patients in the door? Do you feel left behind in the wake of rapid growth in the Internet economy and community? Perhaps you've become deterred from learning the ins and outs of email marketing because it seems so exhausting, foreign, or obtuse. Demandforce, a Dentrix Connected Partner, works with your Dentrix software to help you create a seamless integration.

Email marketing is a necessary component to a successful marketing strategy, but just as important are the message and the audience. At Demandforce, we focus on providing the tools

Figure 1 Customize your message to meet your needs.

Figure 2 Schedule delivery of your message.

to deliver the right message, to the right patient, at the right time. For example, the campaign module allows Demandforce users to segment their entire patient base to send a communication that will deliver the maximum results based on criteria you select. Take a look at how easy it is to generate awareness on services and increase production in just a few steps.

First, select your message. Demandforce has templates available, but you can always design your own campaign or even upload an HTML file. Next, customize your message with a special offer, unique images, expiration date, or anything else you would like to include (Figure 1). Preview your message to ensure that everything looks just right. In fact, you can send a test email to yourself or someone on your team to ensure that there are no broken links or other errors.

Now comes the fun part—select the recipients you want to receive the email. Demandforce allows you to select patients to

receive a specific communication using criteria you set. You can use age, gender, visit history, patients' insurance type, procedures received during a given time period, provider codes, star rating a patient has given in a review, and more to segment your entire patient base.

Lastly, refine your list and schedule delivery (Figure 2). You can send the email right away or postpone it until you are ready. In either case, you are in control of who receives your message and when. All email messages are customizable and actionable, allowing patients an opportunity to request an appointment or update preferences right from the email 24/7.

In addition to email marketing, Demandforce automates day-to-day tasks, such as appointment reminders and confirmations, based on your patients' preference for email or text messaging. Online communication makes it easier to interact with your patients and frees up staff time to focus on patients who are in the office. When a patient uses email or text messaging to confirm an appointment, the confirmation is automatically recorded in your Dentrix software, eliminating another administrative step for staff (Figure 3).
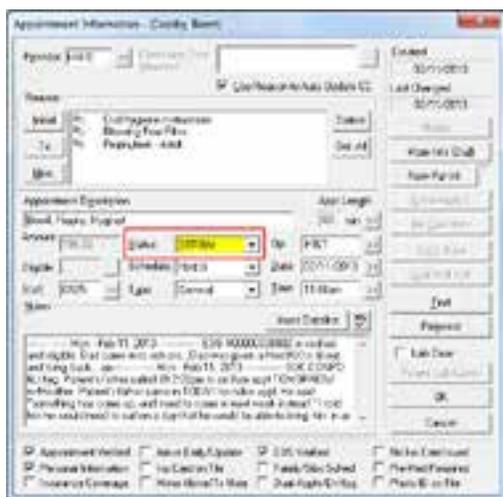
Figure 3 A Demandforce confirmation in the Dentrix Appointment Book.

Demandforce not only gives you a modern communications tool that connects you directly and immediately to your current patients, it also connects you with other successful, local, non-competing businesses, giving you greater exposure to new patients through the Demandforce Network. Here's how it works. When patients confirm an appointment with your practice, the confirmation is recorded in your Dentrix software. Your patients also see a "Thank You" web page where they can add the appointment to their calendar, look up directions to the office, and access your complete practice information. In addition, Demandforce highlights other non-competing businesses in your area. Now you might be wondering how this Demandforce Network benefits your practice. While your patient confirms an appointment with your office, a chiropractic patient is doing the same with a Demandforce chiropractor down the street. Someone else in your neighborhood is confirming an

appointment with an auto shop around the corner, or even a veterinary office where your prospective patient takes his or her pet. Anytime someone confirms an appointment with another Demandforce business, your contact information comes up as a recommended dentist for the area (Figure 4). Your Demandforce
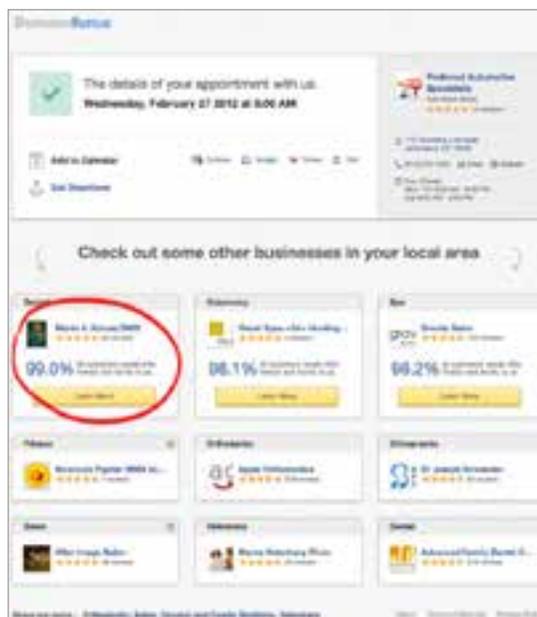
Figure 4 The Demandforce Network profile page.

Network profile page is complete with your certifications and affiliations, contact information, business hours, Demandforce reviews, and allows prospective patients to request an appointment right on the spot. Keep in mind, these consumers are already visiting other Demandforce businesses, so not only are they familiar with the technology, they are spending disposable income. It's easy, it's simple, and best of all, it's automatic!

> We focus on providing the tools to deliver the right message, to the right patient, at the right time.

As the dental industry continues to modernize, it is increasingly important that your practice has the tools to stay top of mind with your current patients and gain visibility with prospective patients. Demandforce helps your practice reach its goals and gives you the opportunity to spend less time worrying about growth and retention and more time doing what you do best—practice dentistry. **DM**

2012 DENTRIX WORKSHOPS

Dentrix workshops are small, focused classes that offer a hands-on learning experience to help you get the most out of your Dentrix software. In 2012, Henry Schein Practice Solutions hosted over **160** workshops in cities across the United States. **2,340** people attended a workshop last year and earned almost **17,000** hours of CE credit.

WHO ATTENDS DENTRIX WORKSHOPS

- Front Office — 28.3%
- Dentist — 11.1%
- Office Manager — 27.2%
- Other — 9.1%
- Hygienist — 9.5%
- Dental Assistant — 14.9%
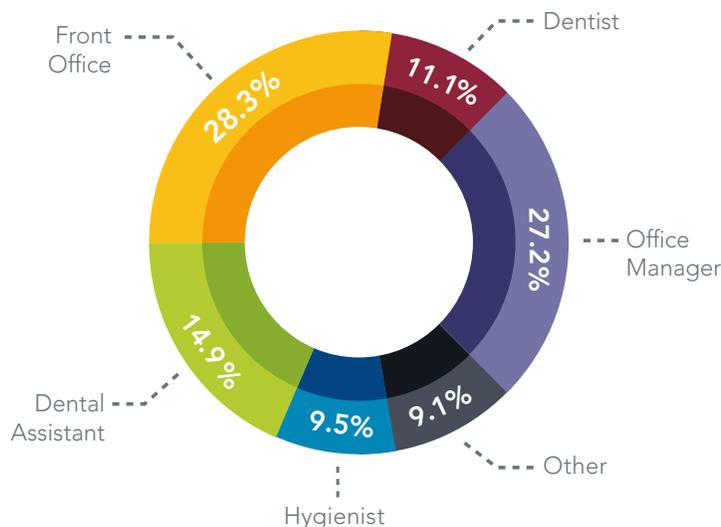
HOW MUCH DENTRIX EXPERIENCE ATTENDEES HAVE

- 5+ years — 38%
- 1-2 years — 20%
- 0 - 12 months — 29%
- 3-4 years — 13%

WHERE WORKSHOPS WERE HELD

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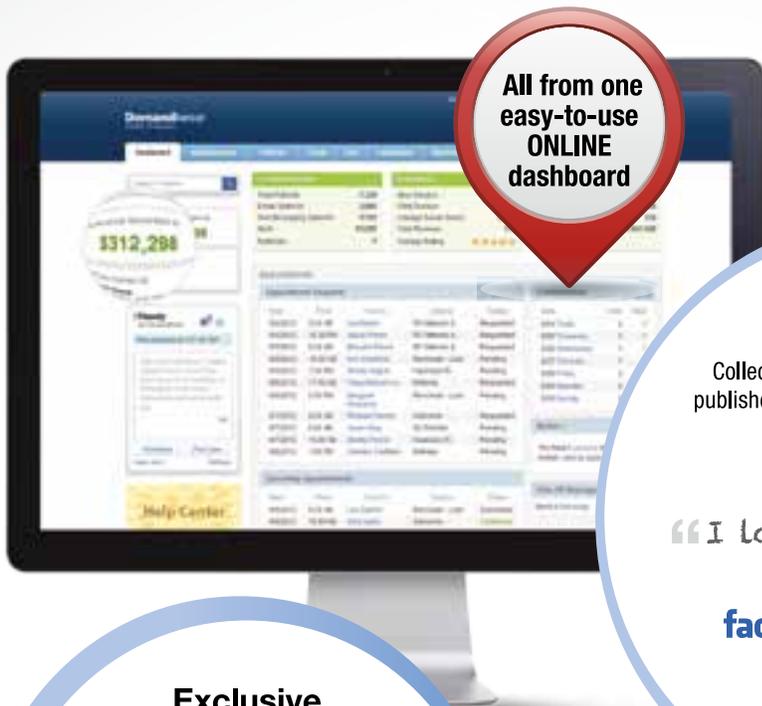
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