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The Dentrix G6 List Manager

Generate lists, cards, letters, and labels in a snap

page 12

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MAGAZINE

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Is Your Team Ready for Your Success?

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SPOTLIGHT

Dentrix Mastery Tracks™ allows dental professionals to test how well they understand and can use Dentrix. Read on to find out about Mary LeBlanc, an office manager who has completed seven Mastery Tracks tests and earned three specialist certificates.

MARY LEBLANC | OFFICE MANAGER

Where do you work?
I work for John A. Schrader D.M.D. at the Willows Dental Group in North Andover, Massachusetts.

What is your title?
I'm the office manager and I'm also a certified dental assistant.

What are some of the duties you're responsible for in your practice?
I am responsible for all of the administrative duties, marketing, budgeting, collections, accounts receivable, and office expenses. I also arrange staff meetings, handle payroll, schedule patient appointments, and manage staff schedules.

How long have you worked with Dentrix?
4 years

Which certificates have you earned?
I have earned the Dentrix Front Office Specialist, Dentrix Financial Specialist, and Dentrix Clinical Specialist certificates.

What got you interested in Dentrix Mastery Tracks?
I am always looking for ways to advance my skills in Dentrix. When I heard about Dentrix Mastery Tracks, I could not wait to get started!

How has participating in Mastery Tracks helped you use Dentrix?
Mastery Tracks has taught me how to fully utilize Dentrix and the many features it has to offer. I have been able to increase my time management with the streamlined tasks that I have learned. There are so many different ways to navigate through Dentrix, and knowing the best path is very helpful!

How has becoming a Dentrix specialist improved your career?
With the support and encouragement of Dr. Schrader, I have been able to achieve my goal of enhancing my practice management skills. Becoming a Dentrix Specialist has given me more confidence and knowledge in Dentrix and also in the dental field. Taking the time to educate myself more has really helped the office run smoothly and more efficiently. It is comforting to know that I can be a reliable source for my office staff as well as my patients.

What is your favorite Dentrix tip or trick?
I have so many tips and tricks that I use! Flip tabs are probably my favorite. They are very simple, yet also very useful and time saving. I also really like using the questionnaires online. Patients find it very convenient to have the option of filling out their health history forms from home.

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

▼ Announcing New Insurance Payor Connections

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

Payor ID	Payor Name
95340	Adventist Health
53287	Blue Cross Blue Shield of Delaware
76031	Blue Cross Blue Shield of Florida
CBFLU	Blue Cross Blue Shield of Florida
BOONG	Boon Administrative Services
CDAR1	Delta Dental of Arkansas
CX052	DentaQuest–Government (Coral Gables, FL) (Medicaid)
CKKY3	DentaQuest–Government (KY)
CKIL1	DentaQuest–Government IL (Medicaid of Illinois)
62154	DentaQuest–Government Plans (TN)
CKVA1	DentaQuest–Government Plans (VA Medicaid)
CKSC1	DentaQuest–Government Plans (SC Medicaid)
CKKY3	Doral Dental of Kentucky/Region 3 (Policy # 0030)
52611	Electrical Workers Welfare Trust
93240	Evergreen Health Co-Op
76031	Florida Combined Life
CBFLU	Florida Combined Life
62180	Health Choice Generations
46221	Health Choice Insurance Payor
22100	Health Choice Integrated Care
45399	Health Choice Utah
53021	LA BCBS Advantage plus Network
CKID1	Medicaid of Idaho (use for DOS 6/30/2011 newer use CX014)–DentaQuest
CKMD1	Medicaid of Maryland (Dept. of Health & Mental Hygiene)–DentaQuest
CX045	National Elevator Industry Benefit Plan (NEIB)

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

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

Payor ID	Payor Name
STR01	Always Care Benefits
93240	Evergreen Health Co-Op
22100	Health Choice Integrated Care
25922	LIFE Armstrong
25924	LIFE Beaver & Lawrence
25923	LIFE Butler
59847	LIFE St. Joseph of the Pines
76184	LIFE St. Mary
27005	LifeStyle Dental
86711	PACE Southeast Michigan
STR01	Starmount
34150	The Health Plan of the Upper Ohio Valley

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

View the entire list of electronic payor connections using the Payor Search Tool at www.dentrix.com/products/eservices/eclaims/payor-search. You can search for specific payors or download the complete payor list. Call 800-734-5561 for help setting up any of these services.

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Go beyond the basic features of Dentrix and discover better ways 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

Say hello to Dentrix G6! Find out what's new and how it can streamline operations. Features include:

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

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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.

Working With You

Learn how customer involvement has influenced recent and upcoming Dentrix releases.

At the start of this new year, I found myself reflecting on the last two years as the Dentrix product manager. During this time, I have had the privilege of meeting with many of you, our Dentrix customers. One of the most enjoyable parts of my job is hearing stories about how Dentrix has helped you to be more successful. I've also appreciated learning how we can improve the product to help you be more efficient.

One of the changes in the last two years has been the realization of our goal to work closer together and to be more transparent. The creation of the Dentrix Advisory Committee, a group of about 200 dental industry professionals using Dentrix, has been paramount in helping us determine where we should focus our time and attention. This group—in conjunction with Dentrix MyVoice (www.myvoice.dentrix.com), focus groups, office visits, and other user interactions—played a critical role in the successful release of Dentrix G6.

I have been so happy with the feedback we've received from customers who have upgraded to Dentrix G6. I have heard things like, "it was such a smooth transition" and "we love the new features." A member at the national AADOM 2015 Conference stated, "Dentrix G6 is the best release of Dentrix in years." Obviously, the success of the release depended on our ability to work closely with you.

Since the G6 release, we have also released Dentrix G6.1, an update that added the ability to use the ICD-10-CM diagnostic code set. In addition, this release enhanced the integration of Dentrix with ePrescribe. Not only can you send electronic prescriptions directly from Dentrix, those prescriptions also now write back to Dentrix. When possible, it will also capture scripts as written by other healthcare professionals to maintain a more detailed patient history.

In addition to Dentrix G6 and G6.1, we have been working hard on G6.2. This release will allow you to set your own DBMS passphrase, and it completely removes Adobe Flash from the software. In addition, it lays some groundwork in the Questionnaires module for changes that will be coming in subsequent releases of Dentrix. You can expect Dentrix G6.2 (which is currently in beta) to release later this year.

When I think about these changes over the last two years, I am very excited for the future. I am confident that as we continue to work closer together, the best years of Dentrix are still to come. If you have any feedback, I would love to hear from you. Feel free to contact me at brad.royer@henryschein.com. **DM**

BRAD ROYER
Dentrix Product Manager

Tips & Tricks

The Dentrix Mastery Tracks™ program helps you assess and improve your Dentrix skills. Find tips that correspond with your job and use them to prepare for a test or just enhance your skills. Visit www.Dentrix.com/Mastery to learn more about Dentrix Mastery Tracks.

Front Office   Financial   Practice Analysis   Clinical

Viewing Documents for an Entire Family

The Document Center allows you to view documents for a single patient or an entire family. When you view the Document Center by family, you can see a list that contains all the documents for every member of the family without having to switch between patients.

To view documents for an entire family at once:

1. Open the Document Center and select one member of the family you want to view.
2. Click **View > By Family** (or click the **By Family** button). The Document Center will display all family members and their documents in one list.

Bonus Tip: You can always see which view option is in use by looking at the bottom left corner of the window (see red box area in the image at the right).
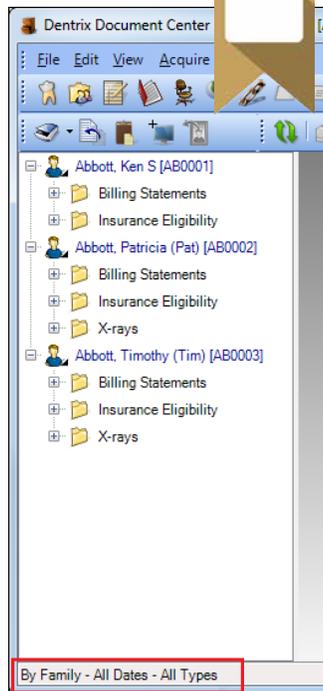
Viewing Progress Notes by Selected Teeth

When patients have an extensive treatment history, it can be difficult to find treatment details or notes about a specific tooth or teeth. You can use the **View by Selected Teeth** option in the Patient Chart to find the history of a specific tooth or group of teeth.

To view by selected teeth:

1. Select the appropriate patient in the Patient Chart.
2. Select the tooth or teeth you want to view information about.
3. Click **View > Progress Notes > By Selected Teeth**. Only the treatment for the selected tooth or teeth is displayed in the Progress Notes.
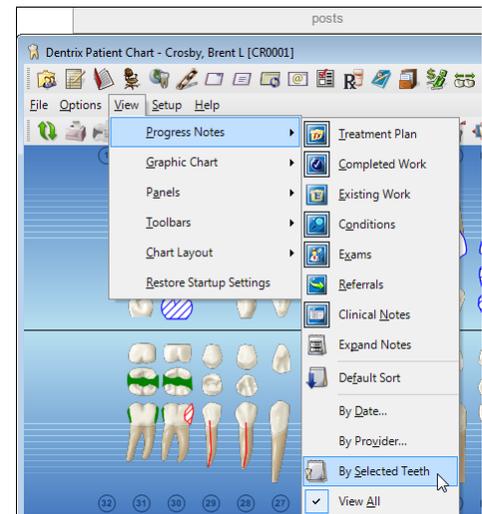
Bonus Tip: You can also view the Progress Notes by:

- Specific date by clicking **View > Progress Notes > By Date** and selecting the date range you want to view.
- Specific provider or group of providers by clicking **View > Progress Notes > By Provider** and selecting a provider or providers.

To view the Progress Notes for all teeth once you have viewed them by a selected tooth, date, or provider, click **View > Progress Notes > View All**.

Determining Production Totals with the Practice Analysis-Production Summary Report

The Production Summary Report is a useful report that can be customized to show the number of times you have performed certain procedures, and the total amounts billed for those procedures. This report also shows each procedure's contribution to the production totals on a percentage basis. The higher this percentage, the more money the procedure is bringing into the office. That's good information to have! You can decide whether this report will be most beneficial to be run monthly, quarterly, yearly, or at some other interval.

To generate the Production Summary Report:

1. From the Office Manager, select Reports > Management > Practice Analysis Reports. The Practice Analysis Reports dialog box appears.
2. In the Select Provider group box, select the provider(s) to include in the report or check All to include all providers.
3. In the Select Billing Type group box, select the billing type(s) to include in the report or check All to include all billing types.
4. In the Date Range group box, set the From and To dates to include in the report, and select whether you want to limit the report to the Entry Date or Procedure Date of the procedures.
5. In the Select Summary Reports group box, check Production Summary and select one or more of the following options available for you to view and/or print:
   • Production Summary by Procedure Category
   • Production Summary Including Cross Coding
   • Production Summary by Procedure Code Range
      – Click the From to To search buttons to specify a procedure code range
6. Click Print to print the report or click Batch to send the report to the Batch Processor.
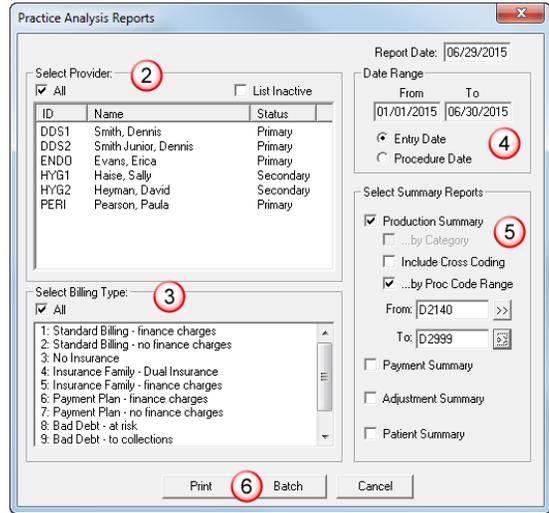
The report does not include patient information or details about the completed procedures, but is limited to viewing production totals by provider, procedure category, and billing type for a given date range.

Displaying Claim Status Notes

It's important to generate the Insurance Claim Aging Report and follow up on outstanding claims to make sure none of your claims are going unpaid. You can include claim status notes on the Insurance Aging Report so that when you generate the report, you have complete information about each claim.

To display claim status notes on the Insurance Aging Report:

1. From the Office Manager, click Reports > Ledger > Insurance Aging Report. The Insurance Claim Aging Report dialog box appears.
2. Set up the report as you normally would.
3. Check the Print Status Notes option.
4. Click OK.

The report will be generated and all status notes entered for each claim will be listed below the claim on the report.
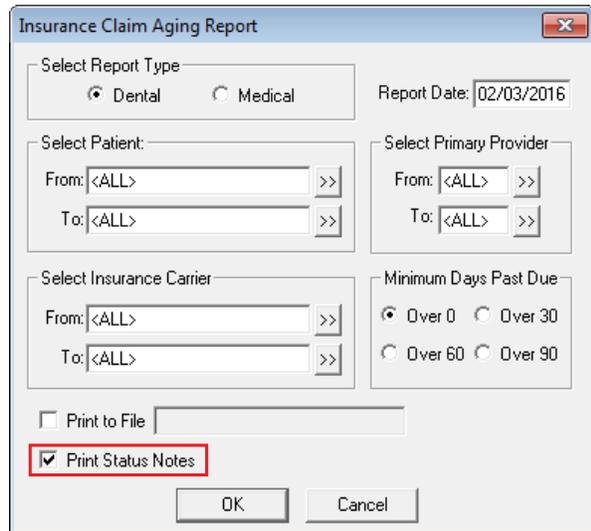
Using the Practice Statistics Report

The Practice Statistics Report gives you a statistical snapshot of your practice you can use to develop strategic business plans. This report groups together statistical information about your practice, including patient demographics information, continuing care statistics, new patient statistics, and the number of patients per provider. The statistics seen on the report represent your practice at the moment you run the report. There are no report options to set up, and the report includes the same categories of information each time you generate it.

To generate the Practice Statistics Report, from the Office Manager, click Reports > Management > Practice Statistics Report. The report is sent directly to the Batch Processor.
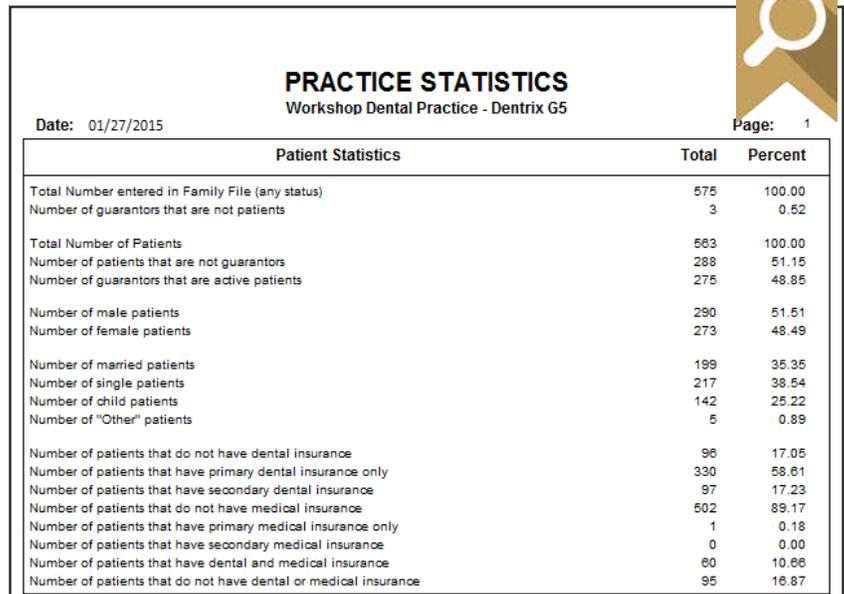
PRACTICE STATISTICS
Workshop Dental Practice - Dentrix G5

Date: 01/27/2015   Page: 1

Patient Statistics	Total	Percent
Total Number entered in Family File (any status)	575	100.00
Number of guarantors that are not patients	3	0.52
Total Number of Patients	563	100.00
Number of patients that are not guarantors	288	51.15
Number of guarantors that are active patients	275	48.85
Number of male patients	290	51.51
Number of female patients	273	48.49
Number of married patients	199	35.35
Number of single patients	217	38.54
Number of child patients	142	25.22
Number of "Other" patients	5	0.89
Number of patients that do not have dental insurance	96	17.05
Number of patients that have primary dental insurance only	330	58.61
Number of patients that have secondary dental insurance	97	17.23
Number of patients that do not have medical insurance	502	89.17
Number of patients that have primary medical insurance only	1	0.18
Number of patients that have secondary medical insurance	0	0.00
Number of patients that have dental and medical insurance	60	10.66
Number of patients that do not have dental or medical insurance	95	16.87

Printing Care Instructions with Walkout Statements

When patients have oral surgery or other difficult procedures completed in your office, you often have care instructions to send home with them. You can attach those care instructions to specific procedure codes. Then, when you complete that procedure code, the care instructions will be automatically printed along with the walkout statement you generate for the patient.

To attach care instructions to specific procedure codes:

1. Create a document that contains the care instructions you want to give to patients and save it in your Dentrix letter template folder.

   Note: If you don't know the location of your Dentrix letter template folder, you can find it in the Office Manager by clicking Maintenance > Practice Setup > Preferences and clicking the Paths tab.

2. Attach the document to the appropriate procedure code. In the Office Manager, click Maintenance > Practice Setup > Procedure Code Setup, select the appropriate procedure code and click Edit. The Procedure Code Editor dialog box appears.

3. Click the Edit Note button. The Edit Procedure Code Notes dialog box appears.

4. In the Recommendation Note group box, click the Recommended Documents search button and select the document you want to attach to the procedure code from the Dentrix letter template folder, and then click OK.

5. Check Print Note on Walkout to include that document when you print a walkout that includes this completed procedure code.

For additional information, log in to the Dentrix Resource Center and search for knowledgebase article #41256 titled *Creating a Doctor Recommendation Note using Microsoft Word*.

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THE DENTRIX G6 LIST MANAGER

Generate lists, cards, letters, and labels
in a snap with the List Manager.

GARY FRAZIER
Contributing Editor
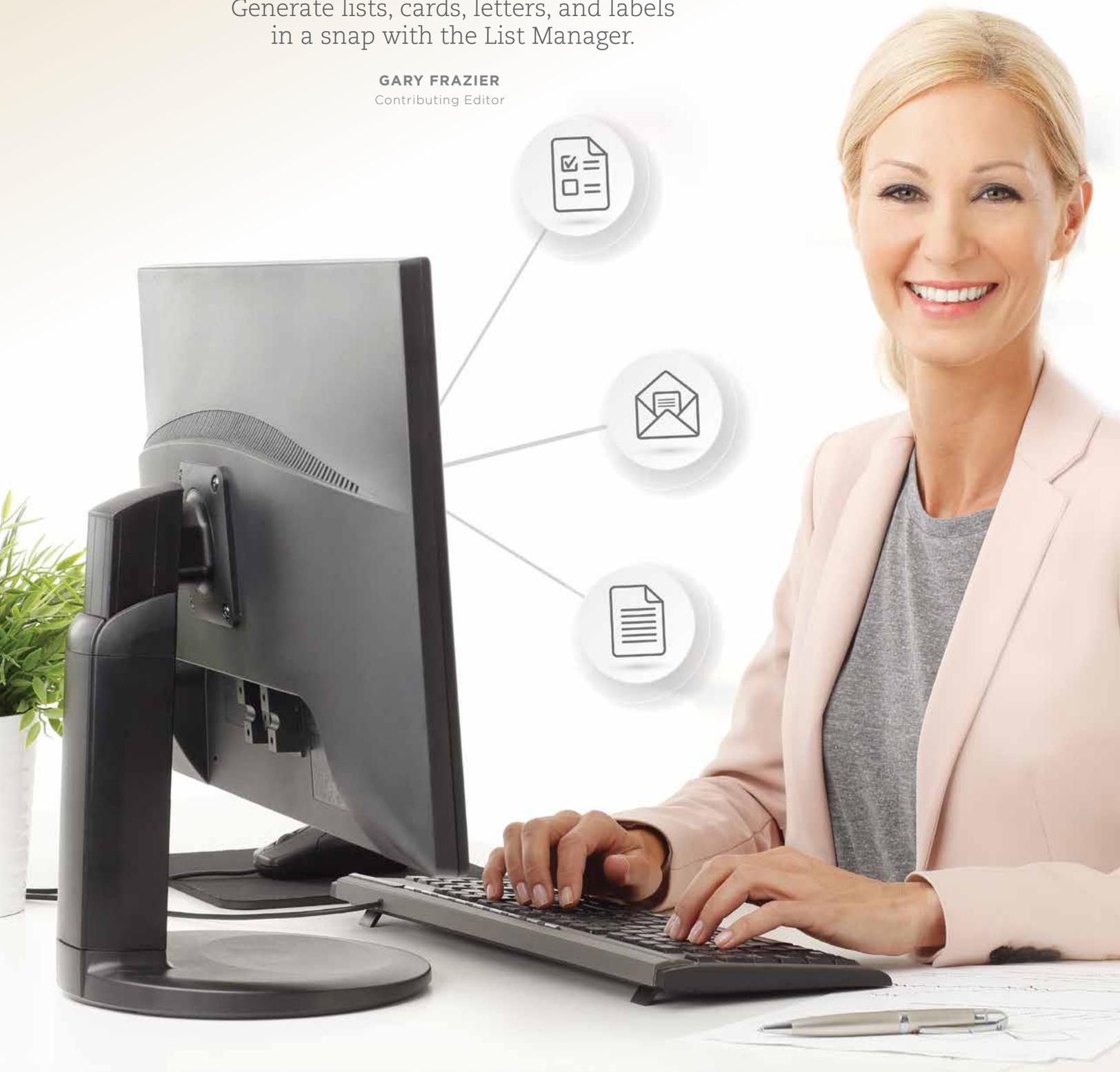
E ven if you primarily correspond with your patients electronically, there are times when your patients and your practice are best served by sending your correspondence through the mail. This is especially true when you have a large number of personalized letters to send. The List Manager, available in Dentrix G6 and later, makes generating cards, letters, and labels much simpler than in the past.

Dentrix has long come complete with pre-defined letter templates in several categories that you can use in conjunction with your patient database. Using these templates, you could create reminder cards, letters, and labels, and even modify the standard templates or create your own—as long as you had a good understanding of the letter merge function in Microsoft Word.

Beginning with Dentrix G6, which added a new List Manager feature, the process of generating lists and letters from your Dentrix patient data became even easier. From the List Manager, you can easily create custom lists, letters, cards, and labels. Furthermore, from a custom list, you can easily identify patients for whom you don't have a complete address and "hide" them in the list so that correspondence for those patients isn't printed. (To hide patients, select them in the list, right-click, and click **Hide Patient** on the shortcut menu.)

The List Manager Toolbar

The List Manager window includes a toolbar from which you can open other Dentrix modules. You can also print and manage lists, cards, letters, and labels. For example, if you want to group a list alphabetically, click the **Group By** button in the toolbar (Figure 1). To return the list to its default setting, click the **Group By** button again.

If you want to abbreviate the column heading names, click the **Column Names** button in the toolbar. To return the column names to their default setting, click the **Columns Names** button again.
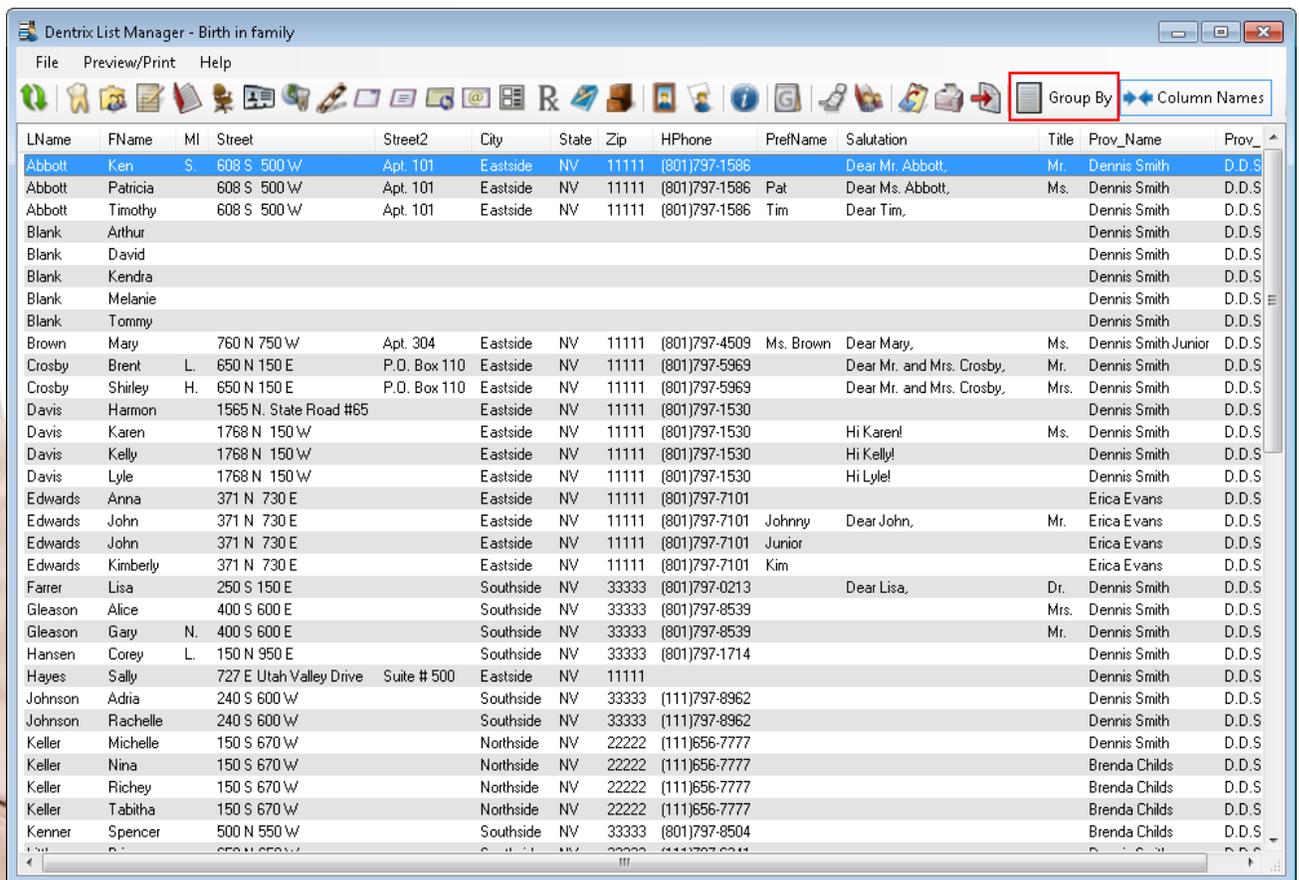
Figure 1 The Dentrix List Manager window.

Creating Letters

In the Office Manager menu, click **Letters & Custom Lists**. In the **Letters & Lists** dialog box (Figure 2), click the button that corresponds to the type of letter that you want to create. A dialog box corresponding to the type of letter appears. If necessary, set a date range. From the list, select the letter that you want to create, and then click **Open List Manager**. The List Manager window appears listing all of the patients fitting within the range you set.

From a list created using List Manager, you can readily identify any patient you don't have a complete address for. You can then hide the patient to prevent printing a letter, label, or card for that patient.

In the toolbar, click the **Create Letters** button. A message box appears (Figure 3). Click **Yes** to add an entry to the Office Journal. Your letters are created in Word and ready for you to print.

Figure 2 The Letters & Lists dialog box.

Creating Custom Lists

You can use the List Manager to get a list of patients you can use like a report. You can create a list from any letter template as described above. Or, you can use the List Manager to create custom lists.

To create custom lists, from the **Letters & Lists** dialog box, click **Misc > Patient Report (by Filters)**. This template is not set up like a letter; it is set up to be a list of patients and is intended to be used for custom reports.

Click **Edit** to set your desired filters. When your filters have been set, click **Open List Manager**. The List Manager window appears.

To exclude a patient, right-click the patient's name, and then from the shortcut menu, click **Hide Patient**. The patient's name is temporarily removed from the list (until you click **Refresh** on the toolbar). To print the list, click **Preview/Print**.

> " The List Manager, available in Dentrix G6 and later, makes generating lists, cards, letters, and labels much simpler than in the past. "
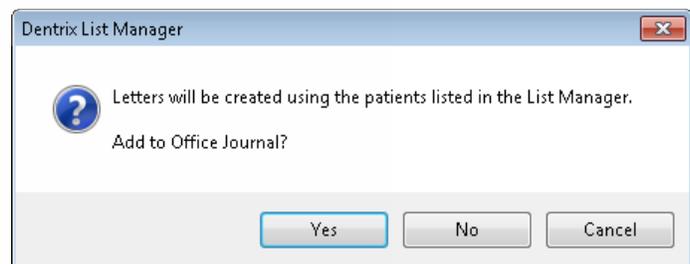
Figure 3 Dentrix asks if you want to add a record of lists you generate to the Office Journal.
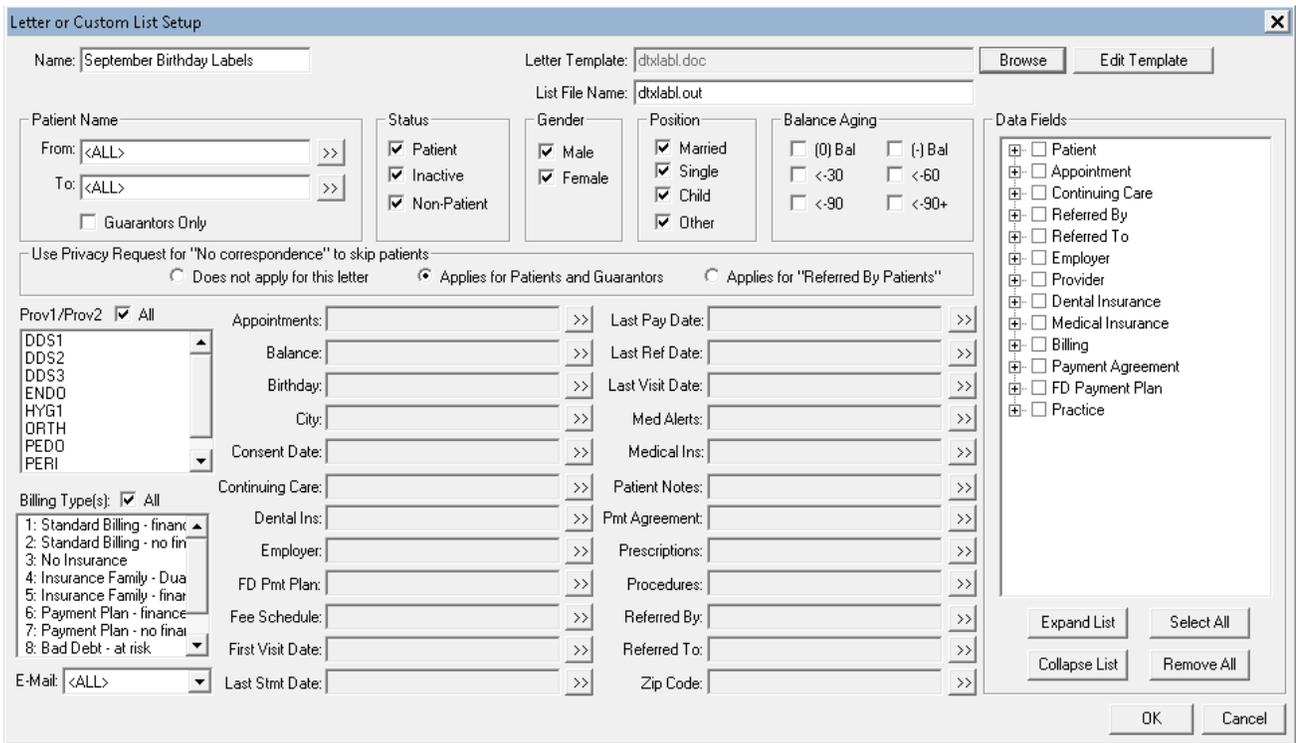
Figure 4 The Letter or Custom List Setup dialog box.

Creating Labels

The List Manager also helps you create mailing labels quickly and efficiently. To create labels, select a category such as **Birthday** from the **Letters & Lists** dialog box. From the **Birthday Letters & Custom Lists** (or other letters type) dialog box, click **New**. From the **Letter or Custom List Setup** dialog box, type a name such as "Custom Label" in the **Name** text box. Select a template by clicking the **Browse** button and then selecting dtxlabl.doc (Avery 5160 labels) or dtxlabl2.doc (Avery 5351). Depending on the template you selected, dtxlabl.out or dtxlabl2.out appears in the **List File Name** text box (Figure 4).

Set any filters that you want to use when creating your labels. For example, to create a date range for birthdays, click the **Birthday** search button and from the **Select Birthdate Range** dialog box, type the date range in the **Beginning** and **Ending** text boxes. Select the data filters for labels: **Last Name, First Name, MI, Street Address, City, State, Zip,** and **Title.** Click **Open List Manager** to review the list and ensure that each entry is complete. In the List Manager toolbar, click the **Create Letters** button. In the message box, click either the **Yes** or **No** button to create your labels.

Creating Cards

To create reminder cards for continuing care patients, click the **Continuing Care** button in the **Letters & Lists** dialog box. In the **Continuing Care Letters & Custom Lists** dialog box, select **Cont. Care Cards – Appointment**, and then click **Edit**.

To change the default Continuing Care type, click the **Continuing Care** search button. In the **Select Continuing Care Ranges** dialog box, leave the dates under **Due Date** and **Prior Treatment** blank, select **With Attached Appointment**, and then select the appropriate Continuing Care Type from the list (Figure 5).

Click the **Appointments** search button, and in the **Select Appointment Range** dialog box, select **Appointment Date**

Range and type the beginning and ending dates for the range of appointments. Click **OK** twice, and then click **Open List Manager**. Review the list, and in the toolbar, click the **Create Letters** button.

The List Manager is a powerful new tool that simplifies the letter merge process and makes it possible for you to review to whom you are sending correspondence before you print. **DM**

LEARN MORE

To learn more about the List Manager, see the "List Manager overview" topic in the Dentrix Help.
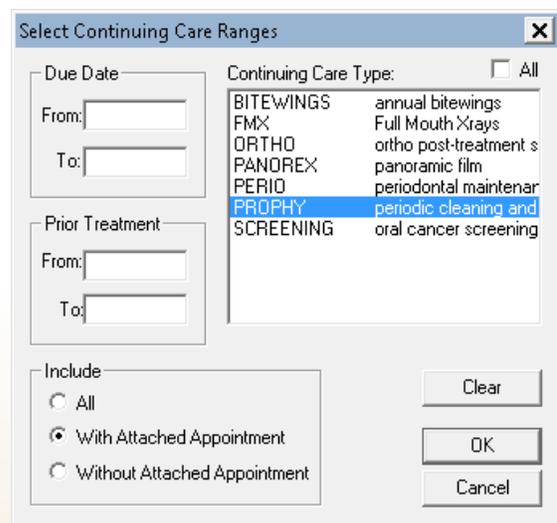
Figure 5 The Select Continuing Care Ranges dialog box.

5 CUSTOM LISTS YOU CAN GENERATE IN DENTRIX

The List Manager is a powerful tool that allows you to create custom lists of patients that meet criteria for which Dentrix doesn't have a predefined report or letter template.

The options you can use with custom lists are nearly endless. As long as there is a filter for the information you need, you can generate a custom list for it. Below are five examples of custom lists that might be helpful to your practice. Try creating these lists and then you can start creating custom lists of your own.

Note: For some custom lists, you may want to include additional data fields to show extra information in the list. To add a data field so it will show up in your custom list, in the **Letter or Custom List Setup** dialog box, check the desired field in the **Data Fields** group box.

Use the Patient Report by Filters template (in the Misc.) category to create your custom lists. Dentrix remembers the last settings and options you used, so be sure to clear them before you create a new custom list.

1. Non-Retained New Patients

This list shows patients who came in for a new patient exam (D0150) one year ago but have not been back to your office since then.

Filters to set:

- Filter A: **Procedures**
  — Under **Search For**, Select **Completed**.
  — Under **Select Procedure Codes**, set **Beginning** to D0150 and **Ending** to D0150.
  — Under **Select Procedure Date**, set **Beginning** to the first day of the month one year ago. Set **Ending** to the last day of the month one year ago.

- Filter B: **Last Visit Date**
  — Leave the **Beginning Date** field blank. Set the **Ending Date** to the end of the month one year ago.

2. Referred Patients with Production

This list shows patients who were referred to your office this year that had treatment completed, making it a valuable referral. Make sure you include the Referred By First and Last Name and Referred Date data fields (in the Referred By category) on the list so you can see who made the referral and when.

Filters to set:

- Filter A: **Referred By**
  — Under **Search**, select either **Referred By Patient** or **Referred by Doctor/Other** (depending on the type of referrals you want to analyze).
  — Under **Referral By Date Range**, set **Beginning** to the first day of the month one year ago or to January 1 of last year. Leave the **Ending** date open to run the list through today, or enter December 31 of last year.

- Filter B: **Procedures**
  — Under **Search For**, Select **Completed**.
  — Under **Select Procedure Codes**, set **Beginning** to D2140 and leave the **Ending** code set to <All>.
  — Under **Select Procedure Date**, set the dates to match the dates you set in the **Referred By** filter.

3. Patients Assigned to Specific Medical Alerts

This list report shows all patients assigned to a particular medical alert. Use this list to help you find all patients who may need special attention (like those with a latex allergy) or to find all patients assigned to a medical alert you want to change or clear. Make sure you include the Medical Alerts data field (in the Patient category) so you can see the alert type on the list.

Filter to set:

- Filter A: **Med Alerts**
  — Select the medical alert(s) you want to include on the report from list.

4. Continuing Care Clean-Up

Dentrix will not let you delete a continuing care type if it is attached to a patient account, even a non-patient or inactive patient. When you are cleaning up your continuing care types and trying to delete unwanted types, you can generate this custom list to find the inactive patients or non-patients that are attached to the continuing care type.

Filters to set:

- Filter A: **Status**
  — Under **Status**, select **Non-Patient** and **Inactive**.

- Filter B: **Continuing Care**
  — Under **Continuing Care Type**, select the continuing care type you want to delete.

5. Patients Without an Email Address

Many offices like to use email as a method of communication with patients because it often has a better response rate than letters. You can find the patients in your database who do not have email addresses so you can get an email address from them next time they are in the office.

Filters to set:

- Filter A: **Guarantors**
  — Under **Patient Name**, select **Guarantors Only**.

- Filter B: **Email**
  — Next to **E-Mail**, select **Only WITHOUT**.
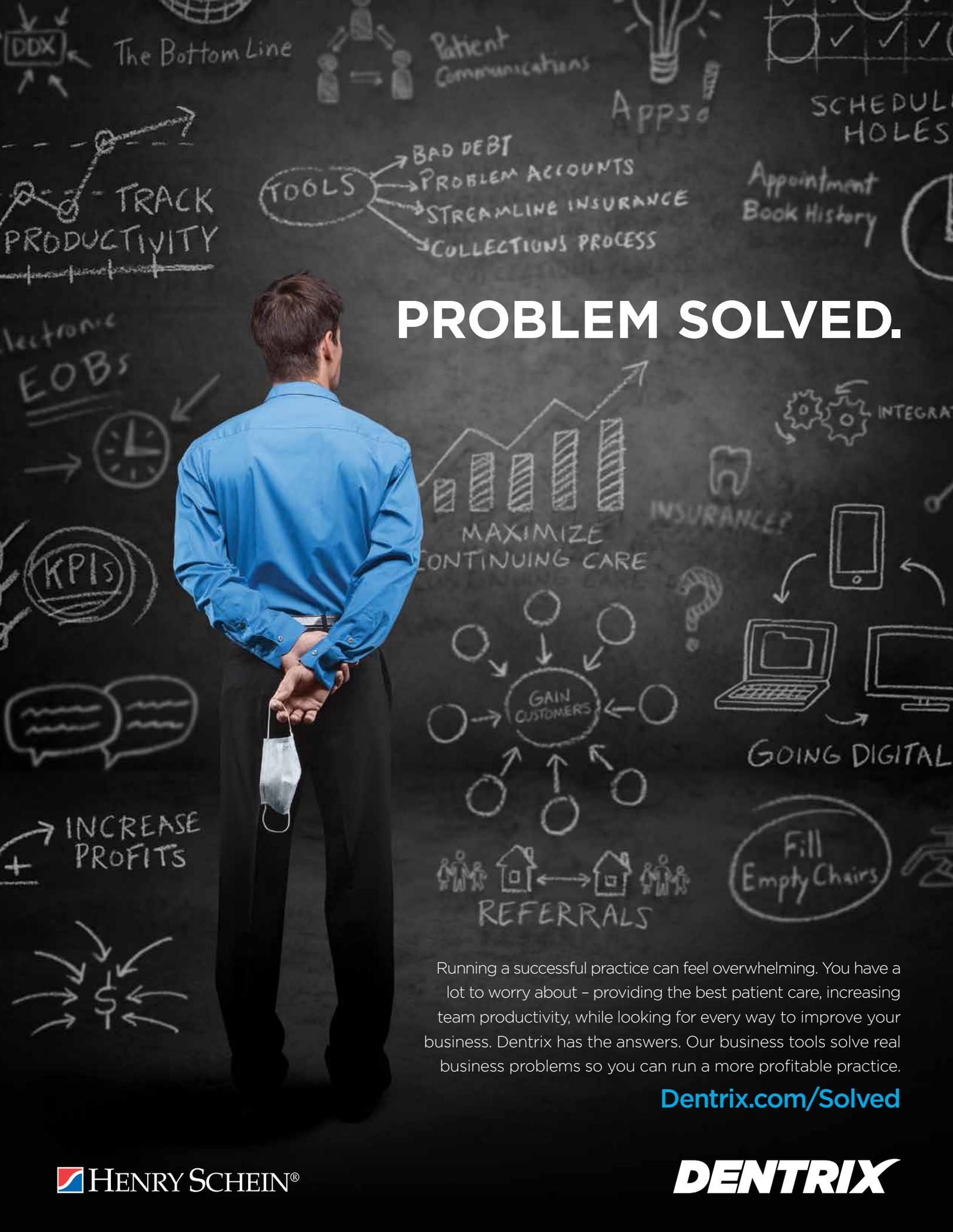
Two important goals of a growing dental practice should be to increase appointment attendance and maintain patient loyalty. One of the best ways to accomplish these goals is to enable your patients to communicate with you using the same technology they use every day, like text messaging.

According to research done by the Pew Research Center in 2014:

- 67% of cell owners find themselves checking their phones for messages, alerts, or calls—even when they don't notice their phone ringing or vibrating.

- 44% of cell owners have slept with their phone next to their bed because they wanted to make sure they didn't miss any calls, text messages, or other updates during the night.

- 29% of cell owners describe their cell phone as "something they can't imagine living without."

Leverage Two-way Text Messaging

Communication Manager, available to Dentrix practices, sends automated text message reminders to patients with scheduled appointments. You can send text message reminders to patients using whatever schedule you choose: 1 day before the appointment, 2 hours before, and so forth. You can even include customized messages. Your patients can confirm the appointment with a simple reply, which posts automatically to the Dentrix Appointment Book. When patients reply to text messages, Communication Manager opens a live chat box on your desktop (Figure 1).

Take Advantage of Smart Messaging

The "smart messaging" feature in Communication Manager helps you market to existing patients more effectively by communicating appointment and continuing care reminders at the appropriate time and through the appropriate delivery mechanism (email, text messaging, or postcard) based on your preference and available patient contact information. This reduces the likelihood of missed appointments and over-communication to patients.

Stay Top of Mind

When combined with other smart message types offered in Communication Manager, such as new patient welcome, thank you for scheduling an appointment, and happy birthday messages, you can further enhance your ability to create a positive and professional impression of your practice throughout the year.

- New patient welcome messages create a great first impression and build confidence in the patient's choice of dental health care provider.

- Thank you messages instill confidence by thanking patients for scheduling their appointments. These messages are automatically distributed when a new appointment is scheduled.

- Happy Birthday messages are an excellent way to stay in contact with patients in between appointments without being salesy.

With Communication Manager, you can effectively and efficiently connect with your patients, using the technology they use every day, to improve appointment attendance and maintain patient loyalty. **DM**

LEARN MORE

To learn more about the Communication Manager features in this article, visit www.dentrix.com/products/eservices/ecentral/communication-manager/features or call 800 734-5561, option 2 to speak to an eServices representative.

CONNECT WITH PATIENTS

THE SMART WAY

|||||||||||||||||||||||||
BRUCE HERBERT
Product Marketing Manager

Reduce missed appointments and build patient loyalty with smart messaging tools in the Dentrix Communication Manager.
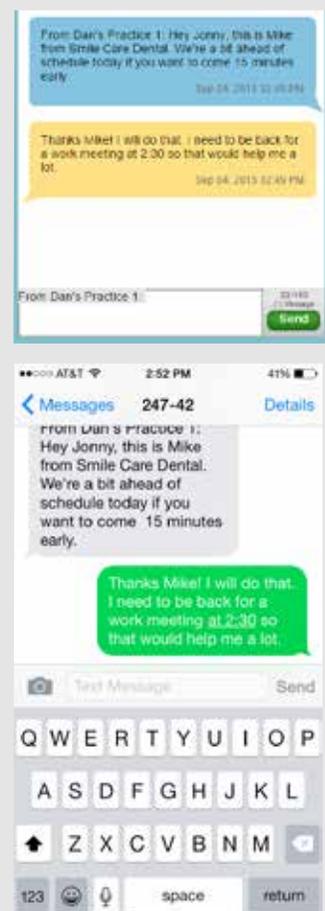
Figure 1 Communication Manager facilitates two-way text message conversations with your patients.

TIME TO START LISTENING

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Clean Up Your Active Patient Base

Learn how to define your active patients in Dentrix.

I f you're like many practices, you probably have patients in your Dentrix database that you haven't seen in a few years. Are these patients simply "inactive" or should you archive them? What is the difference between a "non-patient," "inactive patient," and "archived patient"?

These questions come up a lot when I work with dental practices on cleaning up their Dentrix database and putting effective systems in place for managing their active patient base. It is important to know what your active patient base is so you are not reaching out to patients who have either left the practice or died. Having accurate, up-to-date reports and patient lists is important when you start following up with unscheduled treatment and overdue recare.

Generating a Patient List
First, you'll want to generate a list of patients you haven't seen in a while. On the Office Manager menu bar, click Letters & Custom Lists and then click Inactive Patient to display the Inactive Patient Letters & Custom Lists dialog box (Figure 1). Under Select Letter or Custom List, make sure Inactive – All is selected. Click the double arrow next to Last Visit Date Range and specify an Ending Date that is at least a year or two in the past, such as 01/01/2014. Click OK,

Figure 2 Use the Dentrix List Manager to sort your patient list by last visit date.

and then click Open List Manager. The List Manager window appears (Figure 2). Click the Patient Last Visit Date column header twice to list patients with the oldest Patient Last Visit Date first.

Before you make sweeping changes to the patient status for this list of patients, consider contacting them. You can click the Create Letters button on the toolbar to generate letters in Microsoft Word that you can send to these patients.

Setting the Patient Status
If you're ready to change the status of a patient, with the patient selected in the list, click the Family File icon on the toolbar to open the patient record in the Family File. To change the patient status, with the patient selected in the Family File, double-click the Patient Information block at the top of the Family File window (Figure 3). When the Patient Information dialog box appears, click Status (Figure 4).

I would like to share with you the definitions of each patient status and also my recommendation on how to use them:

Figure 1 You can specify a last visit date range for your List Manager list.
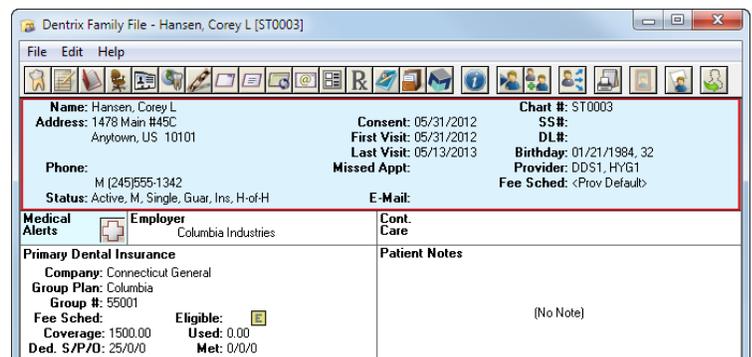
**Figure 3** Double-click the Patient Information block at the top of the Family File window.

Figure 4 Set the patient status in the **Patient Information** dialog box.

Patient – This person is an active patient.

Non-Patient – This is a person who is either an insurance holder or a guarantor on a family account. This is not a person who comes to your office for dental care. This person could also have a patient account if he or she is only an insurance holder for another patient in your practice. For example, if mom is a patient with her two children and dad is the insurance subscriber, then mom would be the guarantor and dad would be a non-patient on the account.

Inactive – This is where it gets a little "gray." If you mark a patient as inactive, he or she will still show up in all search results, and you can still send out letters and generate reports. My opinion is that if you have exhausted all your resources by calling, sending letters, and emailing patients, and they are not responding to you, then you should mark them as inactive. Setting the patient status to inactive will at least remove them from the Continuing Care lists, and you can also remove them from other management reports.

Archived – Archiving a patient removes them from all search results, removes them from all Continuing Care, erases all insurance information, and deletes any future appointments in the schedule. My opinion is that if patients have told you they are leaving, or you know they have died, then archive them. If the patient who has left the practice decides to return, you can bring the account back to active status and re-enter the insurance and continuing care information.

After changing the status, click **OK** to save your changes. Having a clean, accurate system helps with many things like patient count, unscheduled treatment numbers, and setting goals. I hope you will take some time to clean up your patient status and create helpful systems in your practice based on these status definitions. **DM**

LEARN MORE

To learn more about using List Manager, read the "List Manager" article on page 12 of this issue. To learn more about archiving patients, see the "Archiving patients" topic in the Dentrix Help.

Dayna Johnson, founder and principal consultant of Rae Dental Management, helps dental offices improve patient care, increase collections, and reduce staff headaches by implementing efficient management systems. With 20 years of experience in the business and technical side of dental offices, Dayna's passion for efficient systems is grounded in both personal understanding and professional expertise. Dayna can be reached at dayna@raedentalmanagement.com or visit her website at www.raedentalmanagement.com.

DAYNA JOHNSON
Certified Dentrix Trainer

Know Your Numbers, Know Your Practice

Follow these steps to identify and avoid financial issues that could harm your practice.

All successful business owners, dental practice owners included, remain successful by keeping their finger on the pulse of their business. The reliable and quantitative way to measure the health of the business is through the numbers.

If you have a child who's not feeling well, you probably take her to the doctor. Taking your child's temperature will be one of the first steps to determine the cause of the problem. By taking the temperature, you now have a number. Does that number by itself identify what's wrong with your child? No. It's comparing that number to another number (a goal) that starts the process of identifying what is making your child sick.

We do the same thing in business, and your practice is no exception. It's a three-part process that, when tended to regularly, will firmly protect your practice from experiencing insufficient collections, delays in your ability to pay your bills, declining patient base and loss of practice value, adjustments that strangle cash flow, and other destructive practice issues.

Here are the steps:
1. Collect the Numbers
2. Analyze the Numbers
3. Take Action

Sounds simple enough, so why is it that the mention of numbers evokes a glazed-over expression on so many faces? My opinion is that the actual "life" in those numbers is not being considered and therefore, the numbers become dull and boring. Instead, remember that each and every one of the numbers you are collecting, analyzing, and taking action on represent your patients' lives—and yours!

Here's an example:
Collections. We all know that's a dollar amount. But what is it, really? Think about the fact that collection represents treatment performed. It's health, function, and esthetics being restored. It's a patient's sign of trust and confidence in a service performed well. It's representative of your team practicing in a cohesive manner that allows for money to be collected.

All the numbers have a rich "back story." They speak to the people you treat, the systems in your practice, the employees that operate those systems, the suppliers and equipment manufacturers that you count on, and so much more.

Step 1: Collecting the Numbers
This is the easiest step because the numbers are available to you in Dentrix. Avoid being overwhelmed by keeping your focus on a core group of numbers or Key Performance Indicators (KPIs). Only look beyond those numbers when you need more data to conclude or support your theory of what the problem may be.

Here are KPIs you'll want to monitor:

KPI	Monitor From
Accounts Receivable Aging – patient pay and insurance	Aging Report
	Insurance Aging Report
Adjustments	Practice Advisor
Schedule Management	Practice Advisor
Collection	Practice Advisor
Gross and Adjusted Production	Practice Advisor
Net New Patients	Practice Advisor
Production by Provider	Provider A/R Totals Report
Re-appointment Efficiency	Practice Advisor
Treatment Acceptance	Practice Advisor

Collect these KPIs on a monthly basis and have them ready for analysis within a week after the end of the month. By analyzing them promptly after the close of the month you are able to take quick action on areas that need attention.

Step 2: Analyze the Numbers

This is where you measure the "actual" against the "goal." Remember the ill child and taking her temperature? The temperature reading of 101.3 means nothing if not compared to the normal human body temperature of 98.6. The same applies to your numbers.

If you told me that last month your practice produced $180,000, I won't have a reaction, but I will have a question: "What was your goal?" The goal brings things into perspective and identifies success or an area for improvement. If you told me your goal for last month's production was $120,000, I'd help you celebrate! If you said last month's goal was $225,000, I'd roll up my sleeves and help identify why there is such a huge deficit. Determining what caused the deficit and solving it is crucial. If your goals are realistic, that $45,000 deficit represents patients who still have disease in their mouths and went untreated.

> " Remember that every number you collect, analyze, and take action on represents your patients' lives—and yours! "

For some of your KPIs, you will have goals that are industry norms. For instance, look at accounts receivable and how they are aged. If your accounts aged over 90 days are greater than 15-18 percent of total accounts receivable, why is that? Begin your analysis by looking at your A/R totals aged over 90 days from largest to smallest amounts. Determine if there are outstanding insurance claims that need follow-up. By digging a bit deeper you can narrow down the cause of the problem and then begin to develop a plan of action.

Step 3: Take Action

This is where the rubber meets the road! This is where the plan for change occurs. If you only do steps 1 and 2, you will be guaranteed a déjà vu experience each month as nothing will change—and will probably worsen.

Involve the entire team in seeking solutions. When people are a part of developing a solution, they will engage and support the process. Consider action that is appropriate to the cause of the problem. For instance, first run the Adjustment report and then meet with the financial coordinator to establish a reasonable collection goal.

Remember that there can be numerous solutions to a problem, and make sure you've clearly identified the cause of the problem as you evaluate the numbers in step 2. The solution for a car that won't run is not necessarily filling up the gas tank if the issue is a dead battery!

When you take action, do so with a straightforward approach like this:

Take Action!	Plan
What needs to be done	Call patients with past due accounts
	Call insurance companies on past due claims
Who will do it	Tricia – financial coordinator
When will it be done	By two weeks from today

Now you have a clear plan to address the accounts receivable problem and a timeline within which you can expect to see results.

Behind all those numbers exists the reasons why you have a practice—to provide the best possible dental care to people, to provide a living for you and your team, and to contribute to your community. The "life" in your numbers puts the life in your practice. Know your numbers and you will know and embody the purpose of your practice. **DM**

Bringing greater productivity and profitability to general dental and periodontal practices has been the result of Virginia Moore's consulting practice over the past 25 years.

As a speaker, Virginia has presented at the top dental meetings in the U.S. and has spoken at meetings in Canada, the Middle East and Asia.

Virginia is a contributor to ADA's newest publication Expert Business Strategies, is a regular contributor to ADA's Dental Practice Success, as well as authoring two books and co-authoring eight books on practice management. Her passion is getting results that further the success of dental practices.

Virginia is a graduate of the ADA KEMP for dentists. She is a member and past president of the Academy of Dental Management Consultants and also holds membership in the National Speaker's Association and the Speaking and Consulting Network.

She can be reached at vmoore@virginiamoore.com or 530-527-9457.

VIRGINIA MOORE
Moore Practice Success

Backup Basics for Your Practice
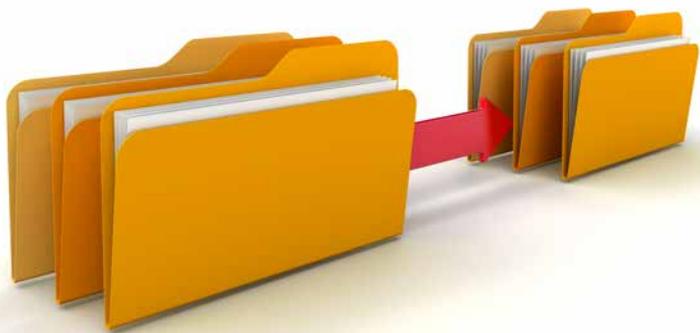
Help protect your practice data by following this simple advice.

Encryption ransomware. Data corruption caused by an update. Accidental deletion. Hardware failure. Fire, flood, and other natural disasters. The causes of data loss are numerous, and anyone who has experienced data loss knows just how important backups are. But while you know you need to have backups, do you know how many backups you need and how often to make them?

Currently one of the most common causes for needing to restore from a backup is encryption ransomware, commonly referred to as crypto viruses. This malicious software typically infects a workstation through an email attachment, and encrypts all of the important and irreplaceable data it is able to find, on the local system and other systems available across your network, including servers. Once encrypted, it is impossible to decrypt the files without purchasing the encryption key. The only real options are to restore from backup or pay the ransom. And when the ransomware predates your backups? You're stuck paying criminals to unlock YOUR data.

If you're backing up regularly, what would make your backup insufficient in this situation? The most common cause is unintentionally built right into the backup process. Let's examine a situation our support teams have come across more than once.

"Dr. Smith's" office runs completely paperless, with digital practice management software and digital X-rays. Both of these databases are housed on a server in the back, and the office manager runs a backup every night, always on the same external hard drive. Monday evening, the backup is run as usual. Tuesday afternoon, someone at the front desk opens an infected email attachment, and the virus goes to work. Tuesday evening, the backup is run as usual, and Wednesday morning the staff come in to find a warning about their data being encrypted, and all of their software

is down. The backup from the night before is useless because it, too, is infected.

How could this or other similar data loss situations have been avoided? Here are some tips for avoiding data loss situations like the one above:

- Use multiple backup drives to accommodate a daily rotation for the days of the week you are open, plus a monthly and a yearly backup.

    Having multiple points in time to restore from is the best way to make sure your data is well protected in case of disaster or corruption that goes unnoticed.

- Always store the most recent backup drive offsite.
  Having key drives offsite, away from an environmental disaster like fire or flood, is a protection against a full data disaster.

- Add an offsite or cloud backup solution as a backup to the onsite backup.
  The best practice rule is to have at least three copies of your data: the original (your server), a local copy stored on a hard drive or other storage device, and an online storage service.

- Check your backup software logs frequently to make sure your backups are running successfully.
  There is nothing more frustrating than thinking you have a good backup, only to find out your data is gone. Make it part of your routine to make sure the backups were successfully completed.

How often you create a backup directly affects how much data loss you will sustain in the event of a failure requiring restoration from backup; if you only run backups once a week, you're exposing your practice to losing up to a week of data. What's your data loss comfort level? Make sure your backup solution is in alignment.

Why Not Get Professional Help?
Making sure your backup solution is robust enough to help protect your practice's data is complicated, and it's easy to get lost in the details. Henry Schein TechCentral can help. Their trained field technicians and certified technical support staff can help you tailor a backup solution to your practice's needs.

TechCentral offers consulting services, maintenance and support programs to keep your critical business systems running. To learn more about TechCentral support and maintenance options, call 877.483.0382, option 1, or visit www.henryscheintechcentral.com. **DM**

MARTIN MCCARTHY
Sales Engineer, Henry Schein TechCentral

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DEXIS and Dentrix:
Seamless Integration Redefined

KATE MCDONALD
Marketing Manager, DEXIS, LLC

Discover what DEXIS can do for your dental office.

DEXIS™ is an industry leader in developing technology for the dental community. DEXIS provides a comprehensive visual narrative of a tooth's health by offering three distinct ways of viewing it—via X-ray, intra-oral camera, and caries detection device. These tools, along with the DEXIS software, combine to deliver a high-quality digital imaging solution built with a focus on image quality, ease of use, efficiency, and case presentation.

The DEXIS radiography system captures sharp radiographs—most importantly, at lower radiation exposure settings. The DEXIS Platinum sensor is versatile, comfortably allowing for periapicals and bitewings (including vertical) with a single sensor, thus eliminating the cost of multiple sensors of different sizes. Its PureImage™ Technology allows for more consistent, usable X-ray images across a range of exposure settings. This can reduce the number of time-consuming, exposure-related retakes, so patients can benefit from the reduction in radiation. Through a combination of advanced hardware and software technologies, the DEXIS Platinum sensor is able to deliver clinically meaningful images that are clear and detailed.

Another innovative tool, DEXIS CariVu™, is a compact, portable caries detection device that uses patented transillumination technology to support the identification of occlusal, interproximal, and recurrent carious lesions and cracks. This unique caries detector allows the clinician to see through the tooth exposing its structure and the actual structure of any carious lesions with high accuracy. Since transillumination can show lesions in the beginning stages, using CariVu during routine prophylaxis can aid the hygienist in identifying questionable areas early on and in deciding on a course of preventive care.

When used together, a radiograph, a transilluminated image, and an intra-oral photo provide a comprehensive picture of the health of a patient's tooth. DEXcam™ 4 is a premium digital intraoral camera that features higher image resolution than previous models and ease-of-use enhancements. For example, capture control is directly on the handpiece, and the capture buttons are membrane switches that are sensitive and easy to trigger. This aids image clarity as camera movement is less likely. The clinician can freeze the image with a single press and save the image into the patient record instantly with a simple press and hold.

Besides offering the excellence of the DEXIS brand, DEXIS integration with Dentrix results in even more efficiency and quality. To achieve many clinical and administrative goals,

Figure 1 Easily attach images to electronic claims using DEXIS.

digital images need to be accessible and considered with all of the patient's information. The DEXIS Integrator™ for Dentrix software provides seamless access to digital imaging within the Dentrix practice management solution.

DEXIS integrates with Dentrix

Why are DEXIS and Dentrix so powerful together?

- DEXIS automatically synchronizes with the patient record, which means all of the patient information is kept together within the Dentrix software.

- Function buttons in the Dentrix Patient Chart allow one-click acquisition of images.

- Images can be attached to electronic claims, lab cases, referrals, and presentations with simple mouse clicks (Figure 1).

Clinicians often need all of the patient's information at their fingertips to formulate a comprehensive treatment plan. With DEXIS and Dentrix, dentists can preview thumbnails of all available radiographic, CariVu and photographic images displayed in a window inside the Dentrix Patient Chart (Figure 2). This enables you to have direct and immediate one-click access to the images from within the patients' Dentrix records. You can use icons to select different types of images, including the following:

- Intra-oral X-rays

- Extra-oral (panoramic and cephalometric) X-rays

- Intra-oral photographic images

- Extra-oral photographic images

- CariVu images, which read like familiar X-ray images

Clicking a thumbnail image instantly displays a clinically meaningful full-size image, with no need to leave the Dentrix


Figure 2 With DEXIS, you can preview thumbnails of all available images inside the Dentrix Patient Chart.

Figure 3 You can open DEXview, the DEXIS image viewer, from the Dentrix Patient Chart.

Patient Chart. Double-clicking on a thumbnail image displays the image at full size in DEXview™, the DEXIS image viewer (Figure 3). With the image displayed, you can use the mouse to change brightness and contrast, and use ClearVu™ functionality to enhance the image. Clicking anywhere else in the Integrator window opens the DEXIS QuickLaunch™ program so you can access and use the full functionality of the DEXIS imaging software and acquire new images.

Digital integration between DEXIS and Dentrix can help reduce the stress of misplaced papers, X-rays in folders, and haphazardly stored computer files. And, because a patient's entire file can be accessed with the click of a mouse, the efficiency speeds up the time it takes to set appointments and to check out.

The integration of imaging software and practice management systems also simplifies the insurance claim filing process because all of the information is readily accessible. With a click to attach the DEXIS images, you can enter the claim and send it electronically to the insurance company right after the appointment is finished. This puts an end to the paper mountain of insurance forms, folders, mailing envelopes, X-rays, and patient histories. Integration between DEXIS and Dentrix paves the way for better organization and efficiency. **DM**

[1] For DEXIS Product "Indications for Use," visit www.dexis.com/ifu

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Patient Activator
www.patientactivator.com

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Practice Mojo
www.practicemojo.com

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RecordLinc

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YAPI

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