

# dentrix

MAGAZINE

## Creating Treatment Plan Options for Your Patients

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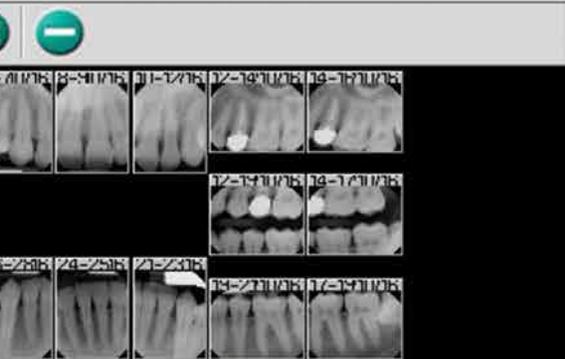
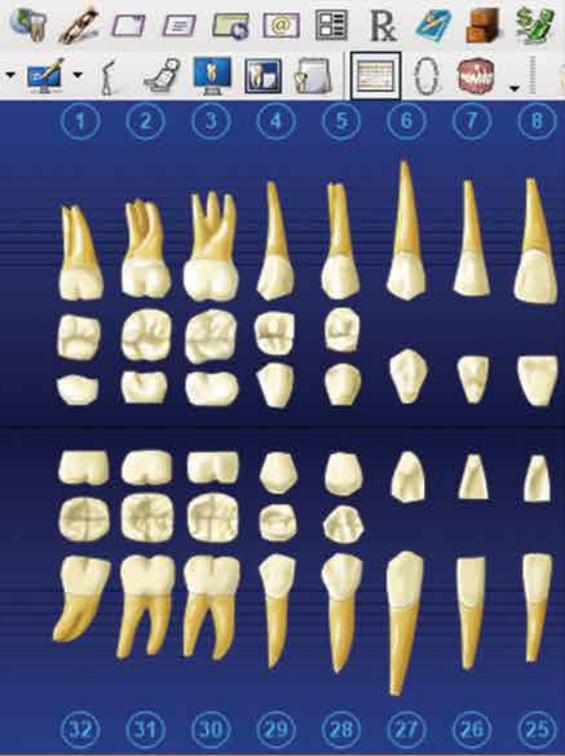
# INTEGRATION WITHOUT FRUSTRATION

Sure, DEXIS gives you the best digital imaging, but did you know it integrates directly into Henry Schein Dentrax to help you diagnose and treat patients faster? DEXIS is Dentrax Connected, which means no more headaches. No more frustration with technology that doesn't work together. Your technology and Dentrax work as one solution, making your staff more efficient and you more profitable.

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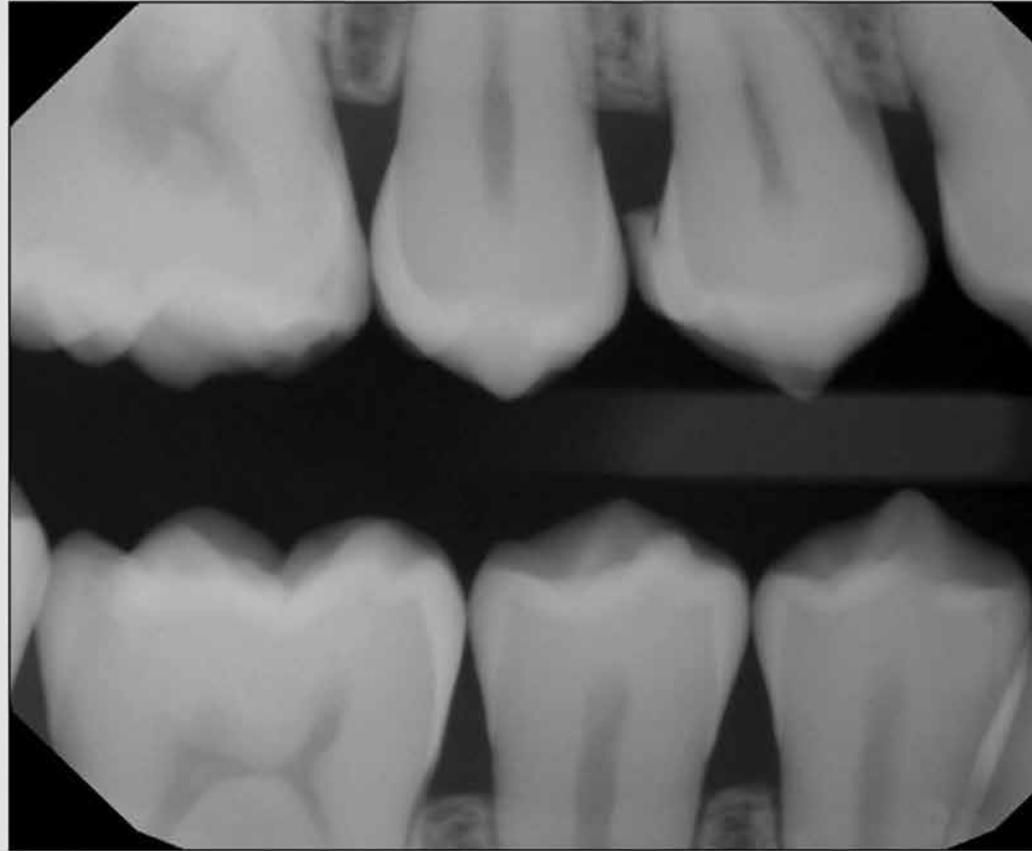
Visit [Dentrax.com/DEXIS](http://Dentrax.com/DEXIS) to learn how the DEXIS + Dentrax connection delivers proven results for Dr. Gerald Bittner.

View Image Setup Help



Demo, Patient (1)  
Tooth 3-28 2/10/2016

Image 16 of 18  
c262a9e0-8211



Clinical Notes Image



# TIME TO START LISTENING

DATA CAN TELL YOU  
WHAT'S RIGHT AND  
WRONG IN YOUR  
PRACTICE

## Practice Advisor Report

Report Date: 08/15/2015

PRODUCTION as of 08/15/2015

Average Daily Production

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**dentrix**  
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# *Is Your Team Ready for Your Success?*

*Add value to your Dentrix solution by  
empowering the people who use it.*

Dentrix Mastery Tracks will make sure every member of your team is as prepared and capable as your technology—by giving you a fast and affordable way to test what they know about Dentrix and find out where they need improvement. It also directs them to the targeted training they need to enhance their skills and improve your practice.

*To get started, visit [Dentrix.com/Mastery](https://Dentrix.com/Mastery)*



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## Dentrix Mastery Tracks

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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 Kelli Wall, an office manager who has completed all eight Mastery Tracks tests and earned all four specialist certificates.



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**KELLI WALL** | OFFICE MANAGER

---

### **Where do you work?**

Bright Smiles Dental in Tooele, Utah

### **What is your title?**

Office Manager

### **What are some of the duties you're responsible for in your practice?**

As an office manager, I hold various responsibilities which include managing insurance and patient accounts, tracking production and collections, using the practice schedule to reach high production levels, and ensuring that the practice is running efficiently.

### **How long have you worked with Dentrix?**

I have worked with Dentrix for four years, and I have been amazed at how beneficial this software is—not only for my specific job, but for my office as a whole!

### **Which certificates have you earned?**

Dentrix Clinical Specialist, Dentrix Front Office Specialist, Dentrix Financial Specialist, Dentrix Practice Analysis Specialist.

### **What got you interested in Dentrix Mastery Tracks?**

I was introduced to Dentrix Mastery Tracks at a meeting with some of my fellow office managers. I love a good challenge and learning new things about Dentrix, so I was determined that I would complete the tests!

### **How has participating in Mastery Tracks helped you use Dentrix?**

Completing the Dentrix Mastery Tracks program opened my eyes to things I didn't realize Dentrix could do. I learned new (and sometimes easier) ways to use Dentrix, and the tests helped me focus on the areas where I can improve. My participation in Mastery Tracks has also helped challenge the other staff members to complete the program.

### **How has becoming a Dentrix specialist improved your career?**

Becoming a Dentrix specialist has made me more comfortable and confident in using all of the modules in Dentrix. I like that I can be an example to my other staff members of the importance of learning the software and understanding how it can be used.

### **What is your favorite Dentrix tip or trick?**

One tip that I have used a lot since completing the Dentrix Mastery Tracks program is updating secondary insurance benefits from the primary insurance claim. This feature has made billing two insurances for our patients more efficient when they have a change in insurance while the primary claim is pending. I also love that I can put status notes on insurance claims and view them on my Insurance Aging Report so I know the status of each claim I have sent. Plus, who doesn't love the Office Journal?

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

## ▼ Announcing New Insurance Payor Connections

### DENTRIX Attachments

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

Payor ID	Payor Name
CB870	Blue Cross Blue Shield of Rhode Island (Non FEP)
46278	DHE KS Sunflower
GI813	Guardian Individual Plan
47570	LifeWise Health Plan of Washington

### DENTRIX eClaims

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

Payor ID	Payor Name
18014	Aetna Medicare EPO/PPO Dental
44423	Alexian Brothers Community Services of TN
CBMNU	Blue Cross Dental (NON FEP)
WVCS1	CareSource West Virginia
74234	CompuSys/ Erisa Group Inc.
22344	Exceedent
47738	Hamaspik Choice
HMD01	Healthy Michigan Dental
40137	Kalos Health
95279	Keenan Associates
34145	Klais and Company
35162	Managed Care Services LLC
63002	Mercy Life of Alabama
81883	Municipal Health Benefit Fund (Little Rock, AR)
69821	Next Level Health Partners, LLC
46571	Quartz ASO
81434	Shelte Point Life
77153	Southern Indiana Health Organization

### DENTRIX InsuranceManager

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

Payor ID	Payor Name
CX052	Atlantic Dental Inc./ADI (Coral Gables, FL) - Medicaid Claims
39026	Benesight
37237	Common Wealth Administrative Group
CX049	Coventry
CDAR1	Delta Dental of Arkansas
CX049	Denex Dental
CX052	DentaQuest - Government (Coral Gables, FL)
CKKY3	DentaQuest - Government (KY)
CX014	DentaQuest - Government Health Plans

62154	DentaQuest - Government Plan (TN)
CKID1	DentaQuest - Government Plans (ID)
CKKY3	DentaQuest - Government Plans (KY)
CKSC1	DentaQuest - Government Plans (SC Medicaid)
CKVA1	DentaQuest - Government Plans (VA Medicaid)
CKIL1	DentaQuest - Government Plans IL (Administered by Doral Dental)
CX014	Doral Dental
CKKY3	Doral Dental of Kentucky
CKKY3	Doral Dental of Kentucky/Region 3 (Policy # 0030)
39026	Employers Insurance of Wisconsin
39026	Fiserv Health - Wausua Benefits/Benesight
CX036	Group Dental Services (GDS)
95266	Harrington Benefit Services (Columbus)
62179	Health Choice of Arizona
CX073	Kaiser NW
CX073	Kaiser Permanete Dental Choice (Rockville, MD)
CKKY3	Kentucky Medicaid, Passport Plan
CKKY3	Medicaid KY (Doral Dental)
CKID1	Medicaid of Idaho
CKIL1	Medicaid of Illinois
CKSC1	Medicaid of South Carolina
CKVA1	Medicaid of Virginia
79480	Midwest Security Administrators Inc.
79480	Midwest Security of WI
CX049	Prudential Dental
CX049	Prudential Dental - Group Service
74223	UICI Administrators - State of Nevada
95266	UMR - Harrington (Columbus)
33108	UMR - Cincinnati (United Medical Resources)
75196	UMR - Harrington (f.k.a. Harrington Benefit Services - Westerville)
37237	UMR - Lexington (Common Wealth Admin LLC)
79480	UMR - Onalaska (Midwest Security of WI)
74223	UMR - San Antonio (American Administrative Group Inc.)
74223	UMR - San Antonio (f.k.a. Benefit Planners Inc.)
33108	UMR - United Medical Resources (Cincinnati)
39026	UMR - Wausua/UHIS
33108	United Medical Resources
39026	Wausau Benefits/Benesight

### DENTRIX eEOB

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

Payor ID	Payor Name
CX052	Atlantic Dental Inc./ADI (Coral Gables, FL) - Medicaid Claims
39026	Benesight
37237	Common Wealth Administrative Group
CX049	Coventry

View the entire list of electronic payor connections using the Payor Search Tool at [www.dentrix.com/products/eservices/eclaims/payor-search](http://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.

▼ Mark Your Calendars for Business of Dentistry 2017

# DENTRIX BUSINESS OF DENTISTRY CONFERENCE | 2017

CAESARS PALACE, LAS VEGAS, NEVADA | AUGUST 17-19

Yes, you read that correctly—Henry Schein's next Dentrrix Business of Dentistry Conference will be held in 2017.

**Why?** We want the Dentrrix Business of Dentistry Conference to be the most amazing, the most valuable, the most fun training event for our Dentrrix users. After considerable review with our team and hearing feedback directly from you, we concluded that this requires us to hold your conference every other year.

**What does this mean for you and your team?** You'll get to experience the best dental training event in the industry. We will take the extra year to build enhanced courses for every member of the team, immersive attendee experiences, networking opportunities and bigger entertainment activities in fabulous Las Vegas. Holding the Business of Dentistry Conference every other year also gives more busy practices the opportunity to attend this important event.

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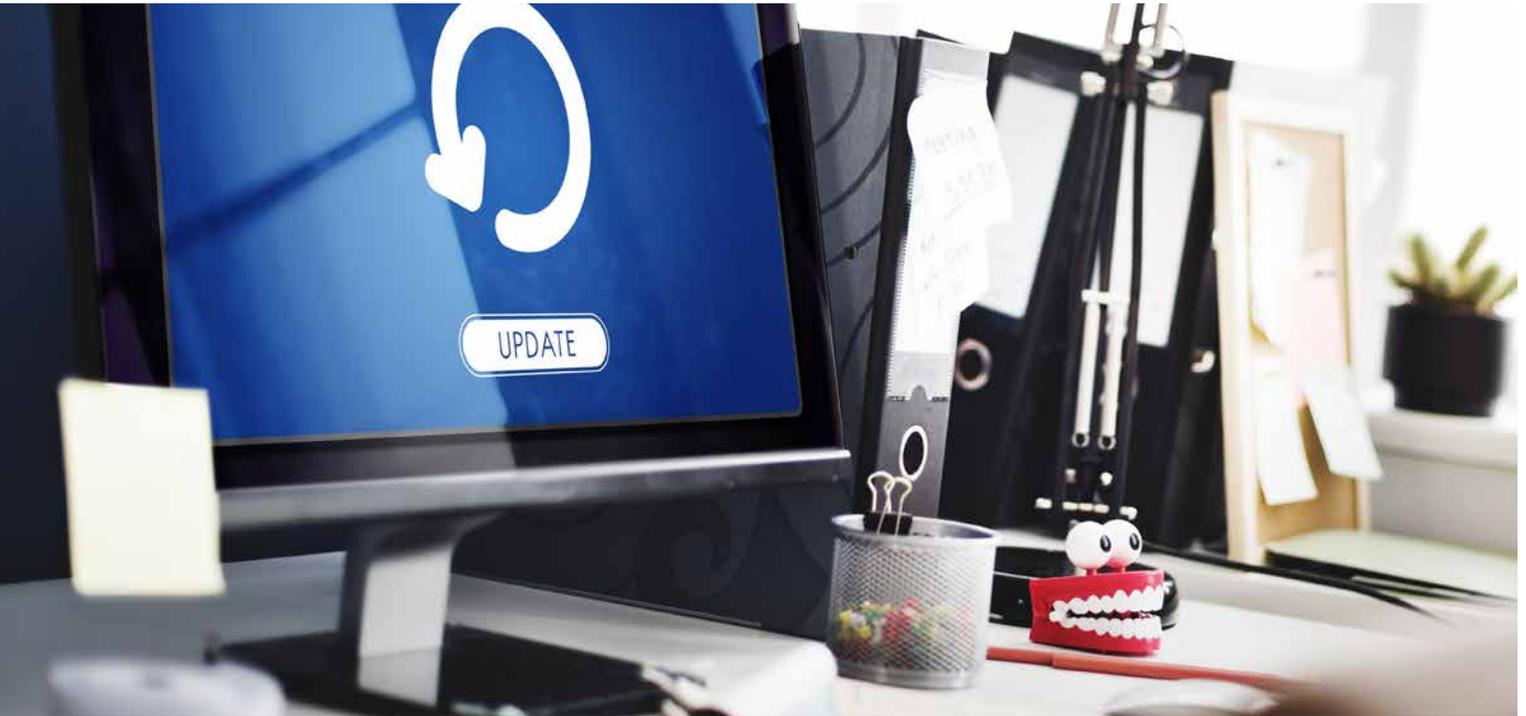
- Dr. Bill Busch, DMD MAGD  
Kansas City, MO

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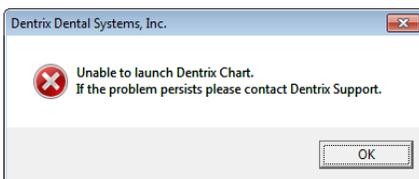
 HENRY SCHEIN®

# Read This Before You Update to .NET Framework 4.6



## Dentrix has released a compatibility update for .NET Framework 4.6.

Earlier this year, Microsoft began automatically distributing a new version of their .NET Framework (.NET 4.6.1) through Windows Updates. This version of .NET Framework, which was previously available only in Windows 10, removed functionality that was used by the



**Figure 1** Some Dentrix modules would no longer open after .NET Framework was updated.

Dentrix Chart, Treatment Planner, Document Center, and Questionnaires modules. As a result of the changes, if .NET 4.6 or higher was installed on any computer running Dentrix, the Dentrix modules listed above would no longer open

but would instead display an error message (Figure 1).

To address this issue for Dentrix G5.2 and G6 customers, Henry Schein released the Dentrix compatibility update for .NET 4.6. (Dentrix G6.1 and higher already included the update.) This software patch allows Dentrix to work correctly

whether you are running the older or newer version of Microsoft .NET Framework. The compatibility update is small and very easy to install. No database conversion is required, and a computer restart is usually not required as long as you close any error messages first. After running the compatibility update on one computer, the update is automatically pushed out to the other computers on the network.

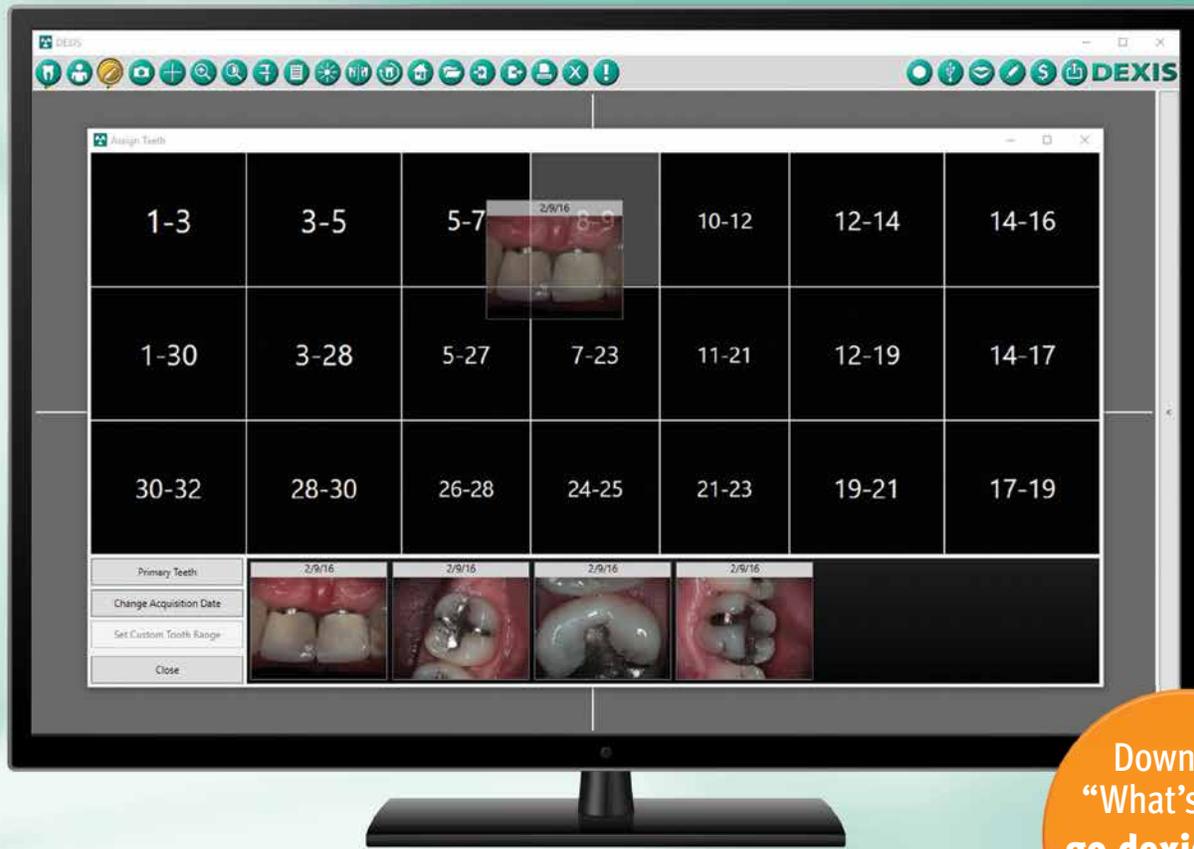
Many of you have already received and installed the compatibility update. If you have not installed it, we highly recommend that you do so. You can find instructions on how to do this by visiting the Dentrix Resource Center and reviewing article 80353.

It is important that you install this update before you update to .NET 4.6 or higher. It is equally important, once you have installed this update, to work with your hardware technician to install .NET Framework 4.6 or higher. For more information about .NET Framework 4.6, visit [www.microsoft.com/en-us/download/details.aspx?id=49982](http://www.microsoft.com/en-us/download/details.aspx?id=49982). **DM**

**BRAD ROYER**  
Dentrix Product Manager



# Introducing DEXIS Eleven



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## The next generation of DEXIS™ dental imaging is here.

**DEXIS Eleven** is the future of DEXIS Imaging Suite and builds on the solid foundation of DEXIS software. This next-generation software enhances your clinical workflow and increases security and flexibility by leveraging cloud computing.

DEXIS Eleven helps your practice in and out of the operatory. In the operatory, DEXIS simplifies your workflow with fewer clicks required for case presentation and common workflows. For your office as a whole, DEXIS Eleven provides peace of mind through enhanced security, always-on cloud backup services, and flexibility to access images from anywhere with CloudVu.\*

DEXIS Eleven retains all the functionality of previous versions while also delivering:

- » Improved workflow, including drag-and-drop tooth numbering, and faster case presentation
- » Safe, real-time storage and synchronization of patient images with Cloud Backup
- » Web-based access to your patient images from anywhere with CloudVu\*

## DEXIS Eleven

Learn more at [dexis.com/dexis-eleven](http://dexis.com/dexis-eleven).

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# 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](http://www.Dentrix.com/Mastery) to learn more about Dentrix Mastery Tracks.

Front Office



Financial



Practice Analysis



Clinical



## Reviewing Past Practice Advisor Reports



Did you know that Dentrix stores a copy of each Practice Advisor Report you generate? These stored reports make it easy to compare the information from past reports with current reports, and see how that information has changed. And because these reports are stored in Dentrix, you don't have to store paper copies that take up filing cabinet space.

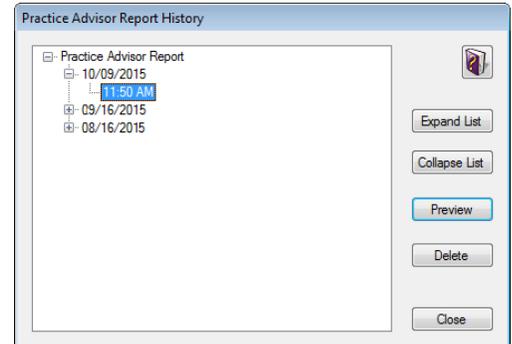
To review past Practice Advisor Reports:

1. From the Office Manager's Analysis menu, click **Practice Advisor**. The Practice Advisor dialog box appears.
2. Click the **Report History** button. The Practice Advisor Report History dialog box appears.

Reports are grouped by date and then listed by the time each was generated. You have the following options for viewing reports listed here:

- **Expand List/Collapse List** - click these buttons to expand or collapse all items.
- **Preview** - Click this button to preview a selected report. This button is only active if a report time is selected.
- **Delete** - Click this button to delete the selected report. This button is only active if a report time is selected.

Previewing past reports is quick and easy because Dentrix doesn't have to regenerate the report.

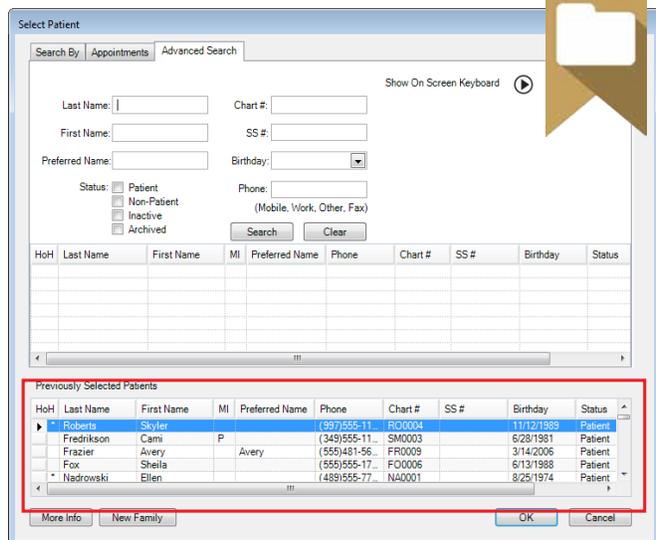


## Quickly Finding Previously Viewed Patients

During the course of a work day you may select hundreds of patients within Dentrix. When selecting a patient, there is a section of the **Select Patient** dialog box that can save you time, especially if you need to find a patient you've already worked with earlier in the day.

In the **Select Patient** dialog box, there is a section at the bottom of the window labeled **Previously Selected Patients**.

This section keeps a list of the last 30 patients you have searched for. You can quickly re-select a patient on this list by double-clicking their name, which can be a lot quicker than having to re-search for them by name, especially if you know you've already looked them up once today. Using the **Previously Selected Patients** list can save you a little bit of time in Dentrix, and a lot of time in the long run.



## Dunning Messages

Dunning messages are automatic payment reminders that print on a billing statement based on an account's aged balance.

There is default text already assigned to standard and insurance dunning messages for predefined age ranges. If the default dunning messages do not meet your needs, you can add to or edit them. There is a 70 character length limit for dunning messages.

To add to or edit dunning messages:

1. In the Office Manager, select **Maintenance > Practice Setup > Dunning Messages**. The Dunning Messages dialog box appears.
2. Do one of the following:
  - a. Under **Standard Dunning Messages, Insurance Dunning Messages, or Last Payment Dunning Messages**, select the option that corresponds to the aging bracket for which you want to add, edit or delete a dunning message. The current dunning message for that aging bracket appears in the text box at the bottom of the dialog box.
  - b. Under **Payment Agreement Dunning Messages**, for the **Missed Monthly Pmts, Missed Semi-monthly Pmts, Missed Bi-weekly Pmts, or Missed Weekly Pmts** group boxes, select the option that corresponds to the number of missed payments for which the dunning message will appear. The current dunning message for the selected option appears in the text box at the bottom of the dialog box.
3. Edit the dunning message as needed.
 

**Note:** You can create a message of up to 70 characters. Click the spell check button to check the spelling of your message.
4. Repeat steps 2 and 3 for any dunning message you want to edit.
5. Click **OK** to save your changes.

Once you have added, edited, or deleted dunning messages, they will appear on the next batch of account billing statements you print or send electronically, as applicable.

## Preventing Procedures from Being Billed to Insurance

Did you know you can set up procedure codes so that by default they are not billed to insurance? That way, when you post that code it won't be included on insurance claims. This can be used for procedure codes you have set up as items that you sell in your practice, such as electric toothbrushes or bleaching supplies, which still need to be posted in the Ledger.

To prevent a procedure code from being billed to insurance:

1. From the **Maintenance** menu in the Office Manager, click **Practice Setup > Procedure Code Setup**. The **Procedure Code Setup** dialog box appears.
2. Select the **Procedure Code Category** and the individual procedure within the category you'd like to edit, and click the **Edit** button. The **Procedure Code Editor** dialog box appears.

3. Check the **Do Not Bill to Dental Insurance** box to exclude the procedure from insurance claims.
4. Click **Save**. Confirm that you want to save your changes.
5. Click **Close** to return to the **Procedure Code Setup** dialog box.
6. Click **Close**.

**Note:** Selecting the **Do Not Bill to Dental Insurance** option also prevents the procedure code from appearing on the **Procedures Not Attached to Insurance** report.

For additional information on how to add or edit procedure codes, see the "Procedure code setup" topic in the Dentrix Help.

# CREATING TREATMENT PLAN OPTIONS

FOR

## YOUR PATIENTS

Discover how easy it is to manage treatment options with Dentrrix

Dental consultants stress the importance of offering patients treatment alternatives as an integral part of the dental office's responsibility to gain informed consent. Plus, you may find it helpful to give patients options when their preferences don't align with your preferred or recommended treatment. Dentrrix makes it easy for you to create and manage treatment alternatives in the Treatment Planner by linking alternate treatment recommendations together or creating alternate cases.

In order to create alternative treatment cases, you must first add both sets of procedures to the patient's treatment plan. For example, if you are going to recommend an implant to a patient but also offer the option of a bridge, you need to treatment plan all of the procedures for the implant and all the procedures for the bridge. It may seem like you have a lot of things treatment planned for the patient, but once you organize the treatment into cases in the Treatment Planner you will be able to make sense of the options.

### **Linked Cases vs. Alternate Cases**

Once you have added all alternatives to the treatment plan you can create treatment alternatives in one of two ways: by linking cases or by creating an alternate cases. By linking cases, you connect two treatment cases together in the Treatment Planner so that they function as alternatives to each other. When one linked case is accepted, the other is rejected.

Alternate cases are also connected together in the same way as linked cases, but there is one distinct difference between the two. When you create an alternate case, in addition to the two treatment options you can also include the treatment that will be required in either case. For example, if you are offering a patient the option of a bridge or an implant, but the patient needs to have several fillings completed regardless of which treatment option they choose, you would create alternate cases and copy the fillings into both cases. That way each treatment alternative would include the restoration option plus the fillings.

## Creating Linked Cases

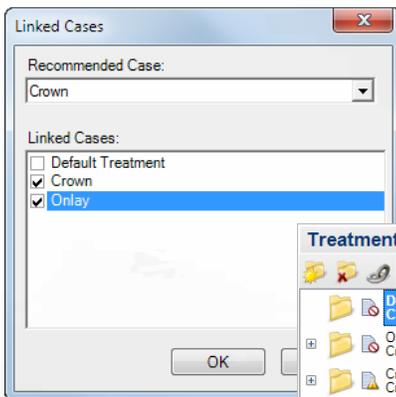
When you have two different cases created in Dentrix that contain different procedures to address the same problem, you can link those cases together and create treatment options. When the patient accepts one of the treatment options the other will be automatically rejected because they are linked together.

## REAL-WORLD SCENARIO

Dr. Smith would like to present treatment alternatives to Hannah Cahill for a cracked molar. He wants to give her the option of either an MB porcelain onlay on #30 or a crown on #30.

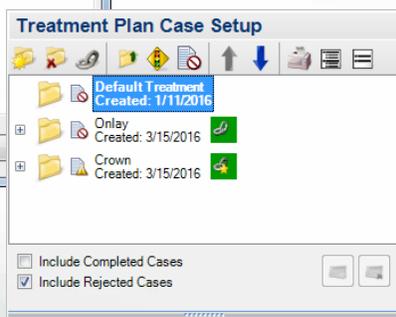
### To link cases:

1. From the Chart, treatment plan all of the procedures for the onlay and the crown.
2. In the Treatment Planner, create a case called Onlay and a separate case called Crown.
3. Add the onlay procedure to the Onlay case and the crown procedures to the Crown case.
4. Click the **Link Cases** button and select **Link Alternate Cases**. The **Linked Cases** dialog box appears (Figure 1).
5. Check the Onlay case and the Crown case. In the **Recommended Case** drop-down, select the case you want to recommend to the patient.
6. Click **OK**. The cases will be linked together as alternate cases.



**Figure 1** In the **Linked Cases** dialog box, select the cases you want to link together.

A linked symbol appears next to each case, indicating the connection (Figure 2). A star on the link symbol indicates the recommended case.



**Figure 2** A link symbol appears next to each linked case.

### Keep in mind:

- Dentrix automatically assigns a recommended case, but you can change that as needed. The case you set as the recommended case should be the treatment alternative that you believe provides the best care for the patient's dental condition. To change the recommended case, right-click the desired case and click **Set as Recommended Case**.
- Only the treatment-planned procedures within the recommended case show in the Patient Chart, which

means that when you are viewing a patient's treatment procedures visually you will only see the options for the recommended case. Changing which case is set as the Recommended Case will change which procedures point on the Chart.

- A linked case cannot be the patient's default case. If you link a new case to the default case, Dentrix automatically creates another treatment case and designates that case as the default case.
- You can unlink cases as necessary if you make a mistake or need to change your settings. To unlink cases, in the **Treatment Plan Case Setup** section of the Navigation panel, select one of the cases you want to unlink and click the **Link Cases** button, and select **Unlink Selected Case** from the menu.

## Creating Alternate Cases

When patients have two or more different treatment options and they also have treatment that must be completed regardless of which treatment option they choose, you should create alternate cases for the treatment. The **Create Alternate Case** tool lets you copy treatment planned procedures to multiple cases, allowing you to create alternatives that each include non-optional procedures.

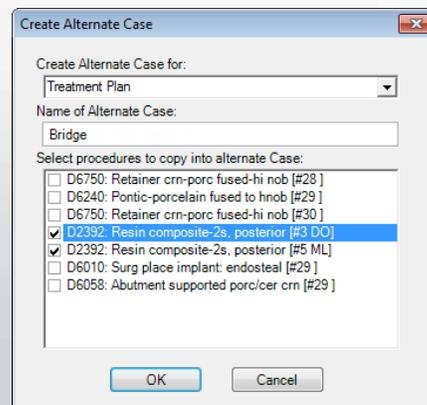
## REAL-WORLD SCENARIO

Jesse Doyle has several procedures in his treatment plan including some composite restorations and treatment alternatives for a missing tooth. Dr. Smith wants to present Jesse with two treatment alternatives for the missing tooth: an implant and a bridge. The implant case should include an implant and an abutment on #29, and the bridge case should include retainer crowns on #28 and #30 and a pontic on #29.

Jesse also needs two fillings, so both cases should include a DO composite on #3 and an ML composite on #5.

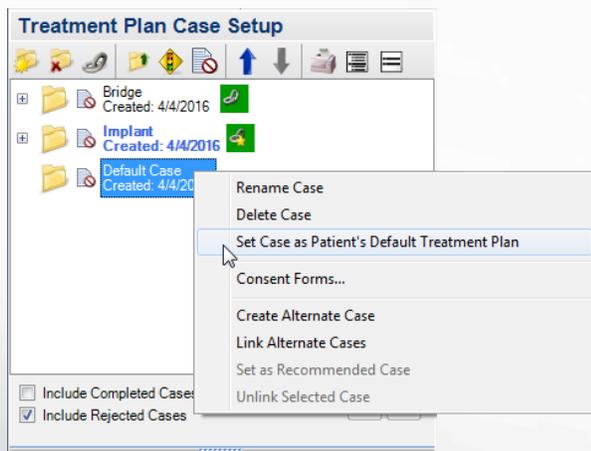
### To create alternate cases:

1. In the Patient Chart, treatment plan the composites, all of the procedures for the implant, and all of the procedures for the bridge. The procedures will be added to the patient's default case in the Treatment Planner.
2. Right-click the default case and select **Create Alternate Case**. The **Create Alternate Case** dialog box appears (Figure 3).



**Figure 3** Select just the procedures you want to have in both alternate cases.

3. Name the new case Bridge.
4. Uncheck everything except the composite procedures since those are the only procedures that will be in both cases.
5. Click **OK**. A new case called Bridge will be created and will contain the composite procedures. As with linked cases, a linked symbol appears next to each case, indicating the connection.
6. In the default case, select all of the bridge procedures and drag them into the Bridge case. You will now have one case containing the implant procedures and one case containing the bridge procedures, but both cases will include the composites.
7. Right-click the default case and select **Rename Case**. Rename the default case to **Implant**.
8. Create a new case called **Default Case**. Right-click the new case and select **Set Case as Patient's Default Treatment Plan** (Figure 4).



**Figure 4** Once you have created the alternate cases, create a new default case.

**Keep in mind:**

- Any time you treatment plan procedures, they are added to the default case in the Treatment Planner. Because you do not want any new procedures added to the cases you just defined, it's important that you make a new default case once you have set up your alternate cases.
- You can tell which case is the default case because the case name appears in bold.
- When you select the procedures in the **Create Alternate Case** dialog box, you are telling Dentrix to add a duplicate copy of the procedures to the new alternate case. You should only check the procedures that both cases will have in common.
- When you complete an alternate case, the procedures that were duplicated in the other case will also be marked as completed. They will not be duplicated in the Chart. **DM**

## • CHECK YOUR UNDERSTANDING •

Use the following case studies to check your understanding of working with alternate treatment cases in Dentrix. Discuss the following scenarios with your team and decide whether you should create multiple unrelated cases, create an alternate case, or link alternate cases:



**Q:** Keri Brown has a missing tooth. Dr. Jones recommends that she have an implant to replace the tooth, but she could have a bridge to replace the tooth.

**A:** Keri will be choosing between two options for treatment, and there is no other treatment that needs to be completed. You should link the alternative cases.



**Q:** Jane Sterling needs to have a root canal. Dr. Jones wants to present some cosmetic bleaching to her as well. The root canal and the bleaching do not need to be completed at the same time.

**A:** Since the procedures are not alternatives to each other and are just separate treatments, you should create two unrelated treatment plans for Jane: one for the root canal and one for the optional cosmetic procedures.



**Q:** Raul Hernandez needs to have fillings on #18 and #19. Dr. Jones is giving him the option of either amalgam or composite fillings.

**A:** Raul will be choosing between two options for treatment, and there is no other treatment that needs to be completed. You should link the alternative cases.



**Q:** Tina Leung needs to have fillings on #6-7 and #15. Dr. Jones wants her to have composites on #6-7, but Tina can choose either an amalgam or a composite on #15.

**A:** Tina needs to have the fillings on #6 and #7 completed regardless of which option she chooses for #15, so you should create alternate cases for the amalgam and composite on #15 that both include the composites on #6-7.

“I knew the advantages of the different technologies I had. What I didn’t know was how much more powerful they are when they are connected. That’s a game changer.”

*Gary Kaye, DDS, FAGD*  
New York, NY



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# DENTRIX

WORKSHOP WISDOM



This excerpt from the Continuing Care Management workshop will teach you how to find patients who have fallen through cracks in your hygiene program and get them back on track. Follow along with the step-by-step instructions and advice in this article to improve the continuing care workflow in your office.

## DON'T LET PATIENTS FALL THROUGH THE CRACKS IN YOUR HYGIENE PROGRAM

A smoothly running continuing care system is one of the essential elements of a thriving dental practice. If your continuing care system is running efficiently and effectively, you'll be better able to keep your patients coming in for regular cleanings and exams, which will lead to faster diagnoses and increased treatment rates in your practice. But when your continuing care system isn't functioning properly, you can lose track of patients, which puts their health at risk and causes your office to miss out on treatment opportunities.



**THE PROBLEM:** Patients aren't coming in for regular continuing care appointments. They aren't receiving reminders from your office and don't show up on your continuing care reports as being overdue.

One of the most common problems with an office's continuing care system is patients who have fallen through the cracks. These are patients who haven't been assigned to a continuing care type, so they don't show up as being overdue for treatment in the Family File or on your reports. These could be patients who haven't yet had a cleaning and exam appointment in your office and never had continuing care assigned to them. They could also be patients whose appointments weren't scheduled correctly and weren't attached to continuing care.

How do you know that a patient has fallen through the cracks of your continuing care system? There are three ways to identify that a patient could be in this situation.

1. The continuing care type is not listed in the patient's account in the Family File.
2. The patient calls to schedule a cleaning and says they never got a reminder from you.
3. The patient does not show up as overdue in the Continuing Care List but has not been in for their continuing care appointment.

In the worst case scenario, these patients may not be attached to the PROPHY\* continuing care type, which means they are overdue for a cleaning and in need of screenings, diagnoses, and treatment, but you don't realize it. In other cases, patients may be attached to the PROPHY continuing care type but not the BITEWINGS type or the PANOREX type. In those cases, patients may be coming in for cleanings, but Dentrix isn't alerting you that the patient is in need of those other services.



**THE SOLUTION:** Locate patients who are not attached to a specific continuing care type, and then assign it to them. In order to solve the problem of patients falling through the cracks of your continuing care system, you need to first find the patients that are in that situation and then assign them to all the relevant continuing care types so you can track them along with the other patients in your practice.

\*If the continuing care types in your office have been customized, they may be named differently than they are in this article.





# FOLLOW

## A L O N G

USE THE FOLLOWING STEPS IN YOUR DENTRIX SYSTEM SO YOU CAN FIND AND CORRECT THIS PROBLEM IN YOUR PRACTICE. FOR THIS EXAMPLE WE WILL USE THE PROPHY CONTINUING CARE TYPE, BUT YOU CAN ADAPT THE STEPS FOR OTHER CONTINUING CARE TYPES AS WELL.

### STEP / 1

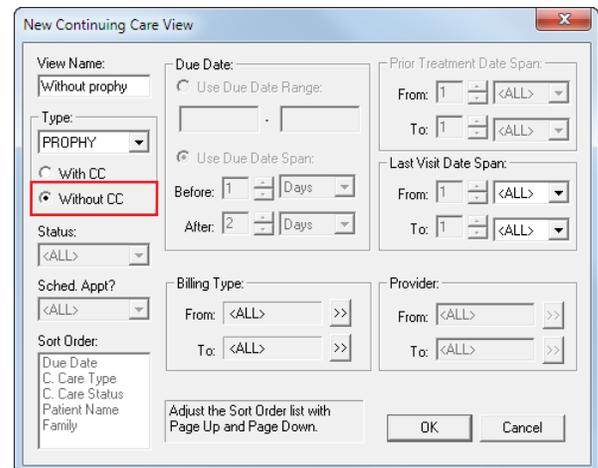
SET UP A VIEW IN THE CONTINUING CARE MODULE THAT SHOWS ALL PATIENTS WITHOUT THE PROPHY CONTINUING CARE TYPE ASSIGNED.

The Continuing Care module is the Dentrix tool that allows you to search your continuing care system. The Continuing Care module uses report filters (called “views”) to search your Dentrix database and create a list of patients that match the criteria of the view. Dentrix comes with several views already set up, but you can create additional views as needed.

To create a new continuing care view you can use to find patients without continuing care assigned, from the Appointment Book, click the **Continuing Care** button. In the Continuing Care module, click **Views > Continuing Care Views Setup**, and then click **New**. In the **New Continuing Care View** dialog box (Figure 1), set up the following information in the view:

- Call the view “Without prophyl.”
- Select the prophy continuing care type in the **Type** menu, and select **Without CC**.
- Set the **Last Visit Date Span** fields from **<ALL>** to **<ALL>**.

Click **OK** to save the view, then click **Close** to close the view setup.



**Figure 1** Set up a view in the Continuing Care module to show patients without the PROPHY type attached.



## STEP / 2

GENERATE THE CONTINUING CARE LIST USING THE VIEW YOU SET UP.

Once you have set up the view in the Continuing Care module, click **Views > Without prophylaxis** to view the list of patients that match the criteria of the “Without prophylaxis” view you set up. The Continuing Care list will appear with the names of all patients who do not have the PROPHY continuing care type assigned to them (Figure 2).

**Note:** Any time you want to run this list in the future you can open the Continuing Care module and click **Views > Without prophylaxis** to view the list. You can skip step 1 since you will already have the list set up.

Dentrix Continuing Care									
Without Continuing Care									
Date	Type	Appt?	Status	Prior Treat.	Name	Age	Prov.	Phone	
					Aguilar, Marta	41		(843)555-9002	
					Albertson, James	76		(638)555-7871	
					Alonzo, Maria	33			
					Alvarez, Adrian	16		(221)555-4854	
					Alvarez, Alex	16		(221)555-4854	
					Antoni, Adrian	31		(509)555-8466	
					Antoni, Sofia	11		(509)555-8466	
					Arquette, Celeste	56			
					Aspen, Paul	65		(647)555-1187	
					Atkins, Monte, Jr.	18		(797)555-4909	
					Atkins, Monte, Sr.	46		(797)555-4909	
					Babu, Raj	28		(616)555-4891	
					Baker, Andre	30			

**Figure 2** The list you generate will show you the names of the patients who aren't attached to the PROPHY type.

# STEP / 3

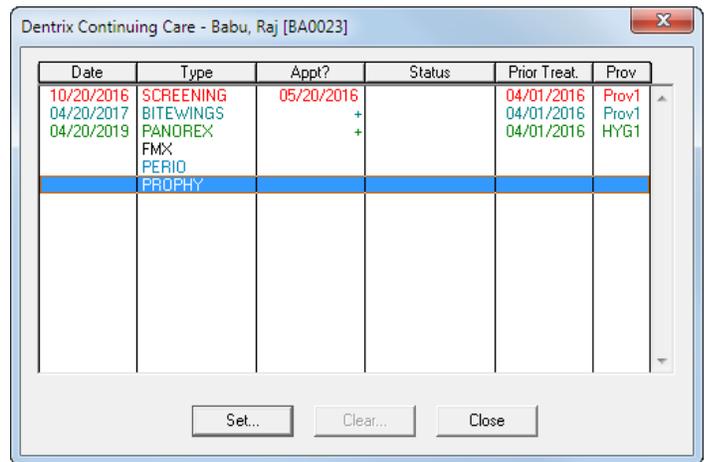
## USE THE LIST YOU CREATED TO ASSIGN THE PATIENTS TO THE PROPHY CONTINUING CARE TYPE.

Go through the list of patients and decide whether each patient should be attached to the PROPHY continuing care type. To help you decide if the patient should be attached to that type, you can click **Edit > Selected Patient's Continuing Care** to view the other continuing care types to which the patient is attached, or you can open the Patient Chart and look at the type of procedures you have completed for that patient. Keep in mind that some patients, like those who are on a perio continuing care schedule, may not need to be assigned to the PROPHY type.

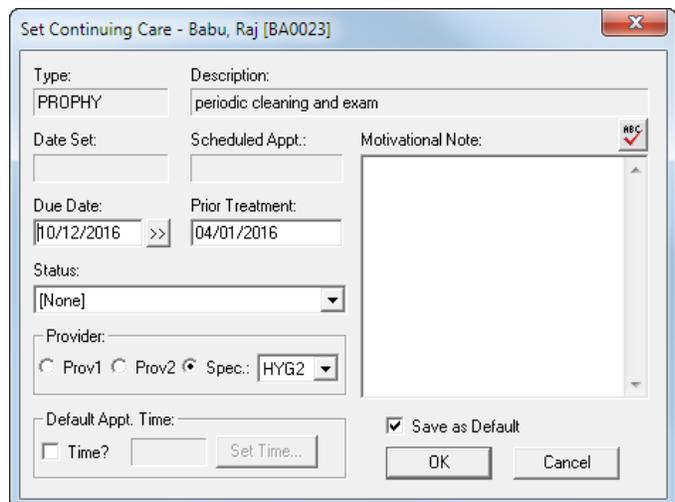
Once you have determined that a patient needs to be assigned to the prophy continuing care type, assign the patient to that type. From the Continuing Care module, select the patient's name on the list and click **Edit > Selected Patient's Continuing Care**. In the selected patient's **Dentrix Continuing Care** dialog box (Figure 3), select the prophy continuing care type and click **Set**. In the **Set Continuing Care** dialog box (Figure 4), enter the details for that continuing care type for the patient, such as the patient's next due date and the provider for this continuing care type, and then click **OK**. Note that the patient names drop off the list as they are assigned to continuing care.

**Tip:** If you want to assign the patient to a different interval than is standard for the other patients in your practice (for example, if this patient should be seen every four months for a prophy instead of every six months), you can do so in the **Set Interval** dialog box. Click the **Due Date** search button and then adjust the patient's interval as needed.

“ IF YOUR CONTINUING CARE SYSTEM IS RUNNING EFFICIENTLY AND EFFECTIVELY, YOU'LL BE BETTER ABLE TO KEEP YOUR PATIENTS COMING IN FOR REGULAR CLEANINGS AND EXAMS, WHICH WILL LEAD TO FASTER DIAGNOSES AND INCREASED TREATMENT RATES IN YOUR PRACTICE. ”



**Figure 3** The patient's Dentrix Continuing Care dialog box shows all of the settings for his or her continuing care.



**Figure 4** You can customize patient-specific continuing care settings like interval and due date in the Set Continuing Care dialog box.



# DENTRIX

WORKSHOP WISDOM



## NEXT STEPS

USE THIS CHECKLIST TO HELP  
YOU IMPLEMENT IDEAS FROM THIS  
ARTICLE IN YOUR PRACTICE.

- ✓ Talk with the doctor, hygienists, office manager, and other stakeholders in your practice and decide which continuing care types you want to make sure you are attaching to patients and tracking.
- ✓ Set up a view in the Continuing Care module that shows all patients without continuing care assigned for each of the continuing care types you want to track.
- ✓ Generate the Continuing Care list to find patients who are not attached to each of the types you decided to track. Attach those types to patients.
- ✓ On a monthly basis, generate the Continuing Care list using the views you set up to find any new patients that are not attached the continuing care types you want to track. Attach them to continuing care as needed.

Repeat this process for BITEWINGS, PANOREX, and any other types of continuing care you want to track. As new patients come to your office, make sure they are properly assigned to continuing care and make sure you are attaching continuing care to appointments in order to prevent this problem in the future. **DM**

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Dentrix workshops offer you a chance to practice using Dentrix in a hands-on, trainer-led class. Workshops offer examples of best practices for using Dentrix in your office, ideas for incorporating lesser-used features into your workflow, and advice about how to customize Dentrix to suit your preferences.

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### LEARN MORE



For more tips like the ones in this article and to get in-depth training on managing your continuing care system in Dentrix, attend the Continuing Care Management workshop. Visit [www.Dentrix.com/Workshops](http://www.Dentrix.com/Workshops) for more information about this and other training workshops, including the full course list, course descriptions, and schedule.



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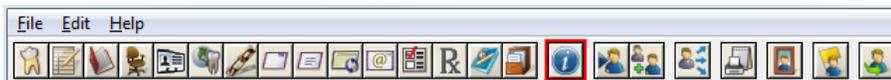
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# Top 10 Dentrrix Features You Aren't Using

My goal with this article is to share with you my top 10 Dentrrix features that you might not even know exist.

Since I work with dental practices every day, I have the unique opportunity to see what features they are using, what features they are not using, and what features they have no idea even exist. My goal with this article is to share with you my top 10 Dentrrix features that you might not even know exist. I won't be able to provide detailed information about each of these features in this short article, but you can go to my blog at [thedentrrixofficemanager.blogspot.com](http://thedentrrixofficemanager.blogspot.com) for more information. At the end of most sections, you'll see references to other articles on my blog where you can read more about that feature. You can also find helpful information about using these features in the Dentrrix Help (from the **Help** menu in Dentrrix, click **Contents**, and use the **Search** tab to search for key words).



**Figure 1** The More Information button is available on most Dentrrix toolbars.

## #1 Quick Letters and Letter Merge

Maybe this sounds familiar: you have a folder containing all of your office's standard letters that you send out to patients, including collection letters, welcome letters, and letters to specialists. When it's time to send a letter, you edit the date, type the patient's name and address, sign the letter, and scan it into the Dentrrix Document Center. That process sounds like a lot of work to me. Why not add your custom letters into the Dentrrix Quick Letters or Letter Merge feature with the proper merge fields, and then let Dentrrix do the work for you? The best part is that this approach will automatically add a note in the Dentrrix Office Journal, and you can print to the Dentrrix Document Center without scanning (see #5 on the list).

For more information, see "Send letters that make an impact" (November 14, 2013) and "Can you write me an excuse note" (August 19, 2014).

## #2 Dentrrix Mobile

Have you ever been sitting in the comfort of your home watching a thunderstorm outside and hoping that the power doesn't go out when suddenly there's nothing but darkness? You check on the office and the power is also out there.

How are you going to let your patients know not to come in? Has the dentist in your office ever been out of town and received a call from a patient requesting a prescription refill but there's no way of checking the last prescription without going into the office? Both of these common scenarios can be solved by registering for Dentrrix Mobile. It's included in your Dentrrix Customer Support Plan, so there's no excuse for not using this service.

For more information, see "Three reasons you should be using Dentrrix Mobile" (December 10, 2013) and "A lifeline to your patient info" (October 24, 2012).

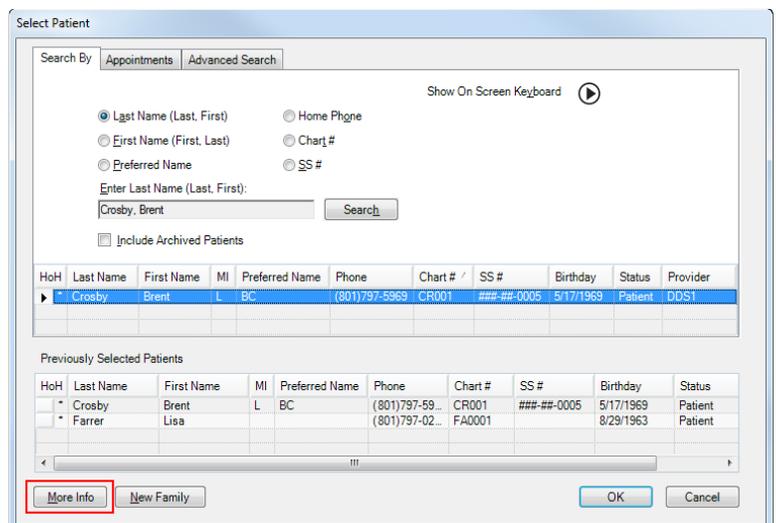
## #3 Payment Agreements

I continue to see office managers who store all their verbal payment agreements in their head. I also see new doctors purchasing practices with a significant amount of the accounts receivable over 90 days past due or new office managers taking over a practice where there has been no management of the accounts receivable. Using the Payment Agreement feature in Dentrrix will not only help you get organized with patients who are making payments, but also allow the entire team to see on the Ledger what the arrangement is with the account.

For more information, see "Two options to help you manage your A/R" (August 31, 2015) and "Get the info out of your head and into the computer" (April 17, 2014).

## #4 Tracking Gratuities and Referrals

Do you know where your new patients are coming from? Are they hearing about you from friends, online search, or



**Figure 2** The More Info button is also available when you select a patient.

the coupon mailer that cost you \$15,000 to send out? Your marketing dollars depend on where patients are being referred from so you should know where to continue spending money and where to stop. When a patient refers a new patient, do you give him or her a thank-you gift? Would you like to track if you gave the referral source a gift card the last time or be able to track a referral source's gratuity history? Tracking referrals and gratuities in Dentrix is super easy and gives the doctor a lot of good information about where to spend marketing dollars. Sadly, I find that most offices never use this useful Dentrix tool.

For more information, see "Building relationships one referral at a time" (February 27, 2013) and "Keep tight reins on your referred patients" (August 23, 2013).

#### #5 Sending to the Dentrix Document Center

This Dentrix feature will save your team a ton of unnecessary scanning, unnecessary wasted paper, and unnecessary hard drive storage space. When you scan a document into the Document Center, it takes many more steps, and the file size of a scanned document is many times larger than that of a file sent electronically through the Dentrix Document Center printer driver. Anything you want to print can be virtually printed to the Document Center for file storage. This is such an amazing yet underused feature.

For more information, see "A little known secret" (September 4, 2012).

#### #6 Perfect Day Scheduling

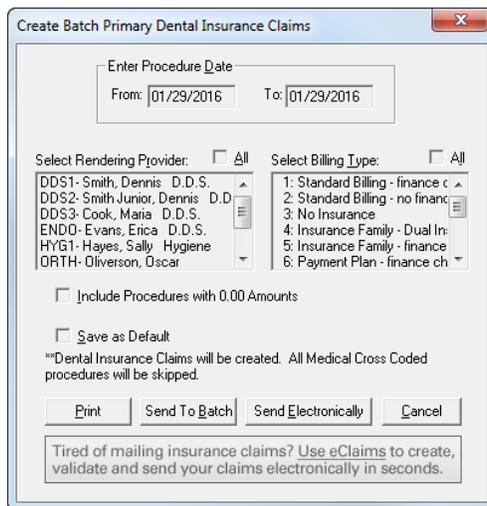
Close your eyes for a moment and imagine that you could see your patients on time, complete 80 percent of your production goal before lunch, get out for lunch on time, and finish your day without pulling the roller skates out of the closet. This can be a reality if you create it. Take control of your Appointment Book with Perfect Day Scheduling. When you use Perfect Day Scheduling, your team knows exactly how to schedule because you have mapped it out for them. There is no room for error.

For more information, see "What if every day could be a perfect day" (March 19, 2013) and "The new patient experience... scheduling the appointment" (July 27, 2011).

#### #7 Goal Tracking

Every dental practice has production and collection goals they need to meet in order to keep the financial state of the business healthy. I always encourage doctors to share these goals with the team and be transparent with the key performance numbers. There are several places in Dentrix to watch and monitor your practice goals so the team can strategize and work together on exceeding the goals. You can monitor your goals on the monthly calendar and the Daily Huddle Report.

For more information, see "Let's do some goal setting" (December 2, 2014).



**Figure 3** Use this feature to search for all procedures that have been posted and not sent to insurance.

#### #8 More Information Button

Have you ever been on the phone with a mom who wants to know when her kids and husband are scheduled for their next appointments? Try the **More Information** button on the toolbar. You will fall in love with this super quick reference tool. You can find the **More Information** button on the toolbar of most Dentrix modules (Figure 1). When you select a patient anywhere in Dentrix, you will also see the **More Information** button in the lower left corner of the dialog box (Figure 2).

#### #9 Create Batch of Primary Dental Claims

Are you sure you have batched and sent off all your insurance claims

from last week? How about last month? You can use the **Create Batch Primary Dental Insurance Claims** button on the Office Manager toolbar to open a dialog box where you can search for all procedures that have been posted and not sent to insurance (Figure 3). This Dentrix feature is like a second pair of eyes to double check and make sure all your claims have been sent out. Not only will this give you peace of mind, it will also help keep your accounts receivable out of the 90-day past due column.

For more information, see "Are all your insurance claims going out?" (March 31, 2015).

#### #10 Patient-Friendly Descriptions

Do your patients often ask what a "resin 2surf, post" or a "Crown-porc fused noble metal" is? Or is your practice in an area where English is not the primary language for many of your patients? If you would like to create a treatment plan that your patients would more easily understand and helps them understand what each procedure is, then start using patient-friendly descriptions. As of Dentrix G6.1, it is even easier to use because you can edit these descriptions in the procedure code editor.

For more information, see "No speak English, no worries" (July 22, 2013).

Have fun experimenting with these Dentrix features and increasing your office efficiency and customer service. If you have questions, drop me a line at [dayna@raedentalmanagement.com](mailto:dayna@raedentalmanagement.com). I'm happy to help. **DM**

#### LEARN MORE

*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](mailto:dayna@raedentalmanagement.com) or visit her website at [www.raedentalmanagement.com](http://www.raedentalmanagement.com).*



**DAYNA JOHNSON**  
Certified Dentrix Trainer

# 12 Rules for the Insurance Game



Learn how to efficiently work with insurance to help your practice get paid.

**F**irst, take a deep breath and realize insurance is a game with the cards stacked in favor of the insurance company. They get to make the rules, change the rules, and they like to keep their money. Do not get emotional. It is a game. Learn as many of the rules as you can so you can play the game better. Here are a few.

1. **Send all insurance electronically daily.** Batch the claims, and be sure all clinical staff check their day sheets for procedure correctness before sending claims. Check the claims submission report and fix any rejections or problems.
2. **Take good x-rays.** Show the apex of the root for prosthodontic procedures. Show the crestal bone (upper AND lower) for perio. Attach these digitally.
3. **Over prove for perio and prosthodontic procedures.** Send everything you can with the claim.
  - For crowns, send a pre-op x-ray and an intraoral camera picture of that tooth.
  - For perio, send an FMX with vertical bitewings—the insurance carrier has to see bone loss and a full perio

chart with recession and bleeding points charted, not just pocket depth.

- For implants, partials, and dentures, send a panoramic x-ray. Send a narrative if it is not abundantly obvious that the service is needed.
4. **Get the clinical team involved.** Have them complete a procedural form (Figure 1) for every prosthodontic procedure.
  5. **Ask patients to update their insurance information annually.** Employers are changing their carriers at a rapid rate. Do not rely on the patient to tell you that their insurance has changed. Create an update form and use it consistently.
  6. **Get insurance data before the new patient comes in.** Verify coverage, benefits available, what the patients has already had done, and intervals for basics like panoramic x-rays, bitewings, fluoride, etc. Use the eCentral eligibility feature or look this up online, if possible. If not, call the carrier or use an insurance data service. Enter the proper information into the specific group plan in the Family File. When a new patient comes with a new insurance group, have a system that everyone follows so you do not duplicate insurance groups in Dentrax.

“ Insurance is a game with the cards stacked in favor of the insurance company. They get to make the rules, change the rules, and they like to keep their money. ”

- 7. **Enter all PPO fee schedules into Dentrix.** Attach the fee schedule to the patient’s insurance group in the **Dental Insurance Plan Information** dialog box. This way you have an accurate treatment plan print out and fee co-pay estimation.
- 8. **Call or check online about the status of claims not paid in 30 days.** Ask the carrier for payment within 10 days. Make a note in the **Insurance Claim Status** dialog box within the claim that indicates your intervention to check the claim status. Be sure the patient is sent a statement when statements go out, and add a billing statement note that explains that you have followed up on the claim.
- 9. **Call or check online about the status of claims not paid in 60 days.** Ask the carrier for payment within 10 days. Make a note in the **Insurance Claim Status** dialog box within the claim that indicates your SECOND intervention to follow up on the claim. Be sure the patient is sent a statement when statements go out, and add a billing statement note that explains that you have followed up on the claim.

- 11. **Run your Insurance Aging Report and print status notes on the report.** For all claims where you have taken intervention action three times and that are over 90 days old, follow this protocol:
  - Print and then close all claims at 90 days that have not been paid.
  - Send a copy of the claim to the patient along with a cover letter stating that you have attempted three times to obtain payment from their carrier.
  - Send a statement to the patient that indicates that the balance is due within 10 days.
- 12. **Avoid unnecessary pre-treatment estimates at all costs.** Pre-treatment estimates often become unscheduled treatment. Instead, use an online service to look up benefits, and use good common sense. If the tooth has a large amalgam with a broken cusp, have your team take an intra-oral picture to attach to the claim with the x-ray and narrative. If both teeth on either side of a bridge site need crowns and the tooth fits the parameters of the policy, don’t pre-estimate. If, on the other hand, the tooth was lost before the policy, not within, then you need a pre-estimate to see whether the bridge is covered. Most plans don’t like to pay for bridges if the teeth on either side are good and the tooth was removed outside of the policy dates.

**A couple more:** Go to an insurance update course annually. Use Dr. Charles Blair’s *Coding with Confidence* as your rule book of the game. Take his newsletter: [www.drcharlesblair.com](http://www.drcharlesblair.com).

Make your insurance system and protocols consistent. Take time each day to do these steps. Patients are relying on their insurance more than ever. Know how to efficiently work with insurance to help your practice get paid. **DM**

*Linda Drevenstedt, MS, President of Drevenstedt Consulting, LLC is a consultant, a life coach, speaker, author, and webinar developer with an insightful and broad perspective. Her “Steel Magnolia” approach is honest and straightforward with a spoonful of sugar. She has real “in the trenches” experience from dental hygiene, dental assisting and managing a multi-specialty dental group practice.*

*She holds undergraduate degrees in Dental Hygiene and Business Management and a Master’s degree in Health Care Administration. Dentistry Today has voted her a “Leader in Consulting and Speaking” for the past 15 years. Linda’s new book, Life Path by Design, is currently available on Amazon. Email her at [linda@drevenstedt.com](mailto:linda@drevenstedt.com).*

**LINDA DREVENSTEDT**  
President of Drevenstedt Consulting



**Crown, Bridge and Partials VITAL Information**  
 For our practice to be paid by insurance this information is VITAL.  
 Complete this form and procedures at the prep or initial impression appointment.

Is this initial placement? \_\_\_\_ Yes \_\_\_\_ No

If “NO”, date of prior placement: \_\_\_\_\_

Reason for replacement: \_\_\_\_\_

Bridges and partials –tooth numbers that are being replaced: \_\_\_\_\_  
**AND** date of extraction of the replacement teeth: \_\_\_\_\_

Take a pre-clinical x-ray(s) showing the area involved. Show the apex off the tooth.

Take an IO camera photo of the diagnosed tooth and identify the tooth involved.

Take a Panorex for partials and implants.

**Figure 1** Procedural forms can help improve your efficiency and consistency.

- 10. **Call or check online about the status of claims not paid in 90 days.** Ask the carrier for payment within 10 days. Make a note in the **Insurance Claim Status** dialog box within the claim that indicates your THIRD AND LAST intervention to follow up on their claim. Be sure the patient is sent a statement when statements go out, and add a billing statement note that explains that you have followed up on the claim.

# You're Not Paranoid—Someone Really is Out to Get Your Patients' PHI



The bad guys want to steal your patients' data, and regulators want to punish you if the bad guys succeed.

**T**he entire dental industry is in the crosshairs of regulators and lawyers who are focused on safeguarding protected health information (PHI). The “bad guys” want to steal your patients' data, and regulators want to punish you if the bad guys succeed.

Most dental offices have the latest equipment and trained teams to provide excellent patient service, but when it comes to security, many are lacking. This is unfortunate because the dental industry suffers the same trends as healthcare in general: upticks in cyber-attacks, social engineering, malware, and cyber ransom that can cost millions of dollars in response, credit monitoring, and fines. And now the Office of Civil Rights (OCR) is taking a closer look at how PHI is protected—across all forms of health care, including dentistry.

## No. 1 Cause of Breaches: Theft

It may be surprising to learn that half of all dental PHI breaches are due to theft. In one 2015 case in Nevada, 12,000 records were compromised when a device with unencrypted data was stolen. In another, a laptop was stolen from the car of a business associate that impacted 76,000 victims.

But other types of incidents are surfacing as well. One large group dental practice last year exposed 151,000 records—complete with patient names, Social Security numbers, birth dates, phone numbers, and home addresses—when

hackers used malware to obtain an employee's username and password for the practice's membership database.

## Theft is Just the Beginning

Theft and hacking are just the beginning. An increasingly popular tactic is crypto-ransomware, a type of malicious software (malware) that infects a computer and restricts access to it until a ransom is paid to unlock it.

In fact, ransomware has become so pervasive, the FBI has warned that ransomware has become one of the biggest threats to consumers and businesses. Victims can be infected by clicking on links in malicious emails that appear to be from legitimate businesses and through compromised advertisements on popular websites. Or they can become victims simply by visiting the wrong website, as discovered in one major case in California, where a hacker used crypto-ransomware downloaded via browser drive-by (visiting compromised websites) that resulted in the practice being taken offline for several days until backups were recovered. Data recovery was only the beginning of that hack; the dental practice had to notify regulators, and a federal investigation ensued.

Data breaches can be crippling to dental organizations. They can face millions of dollars in losses due to lost business, fines, remediation, and litigation.

## How Protected Are You?

One way for dentists to avoid a PHI breach or loss is to regularly conduct HIPAA security risk assessments (SRAs) in their practices. SRAs look at the current state of affairs and then provide a remediation roadmap that helps the entire team correct gaps in compliance from a technical, physical and administrative perspective.

Another way to lessen risks is to take advantage of cloud computing. Storing data in the cloud is a popular choice for dentists due to its agility and cost effectiveness. By moving their server from the office to the cloud, dentists can help defend themselves against the number one cause of compromised PHI—theft of the server due to unsecured in-office environments.

Henry Schein TechCentral, and its security partner, ClearDATA, can conduct SRAs and offer cloud technologies and managed services that can play an important role in helping you protect your practice from data thieves. To learn more about TechCentral security risk assessments call 877.483.0382 or visit [www.henryscheintechcentral.com](http://www.henryscheintechcentral.com). **DM**

## CHRIS BOWEN

Founder and Chief Privacy & Security Officer of ClearDATA



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## eDossea and Dentrrix: Sharing Patient Information Safely and Easily

**ARINDAM CHATTERJEE**

Founder and President, eDossea

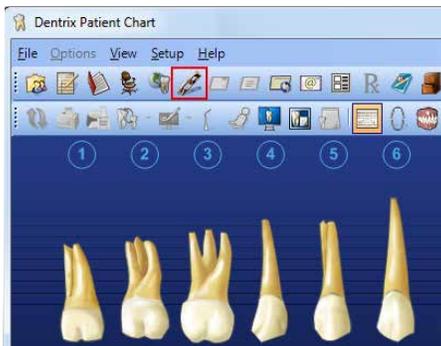
Using eDossea helps you share patient information safely and easily.

A specialist has requested X-rays and other patient information from your dental office. Your office uses an unencrypted email program, so email isn't an option. What do you do?

If you're a Dentrrix dentist, you call eDossea or go to [www.edossea.com](http://www.edossea.com). In 15 to 20 minutes, you can be trained on eDossea and set up to safely share patient information

with the requesting specialist. All you need is an Internet connection. With eDossea, you don't have to install software, and neither do your recipients.

If you're using Dentrrix G5 or G6, you simply click on the eDossea icon in the patient chart toolbar (Figure 1). You don't have to exit Dentrrix or open a separate program or browser window.

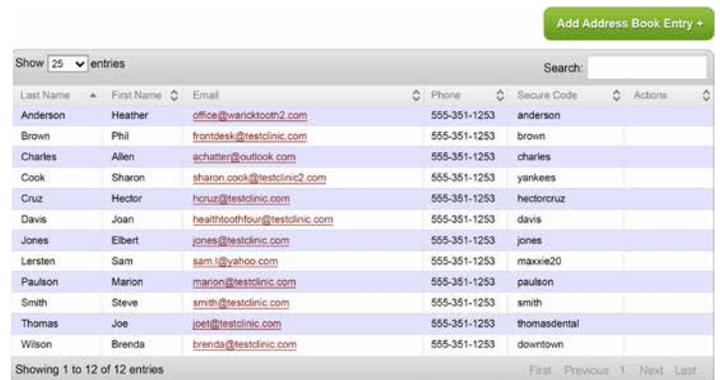


**Figure 1** Click the DentrXlink button on the Dentrrix toolbar to access eDossea.

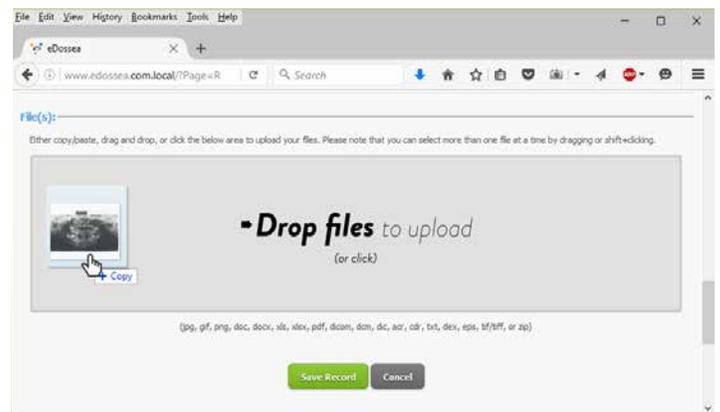
Next, you fill out the data exchange form and select the recipient from your eDossea address book (Figure 2). Then, you create a record to input details, and upload the files you want to share (Figure 3). The files are encrypted by eDossea and saved in a secure web portal, where your recipient can log in through the Internet and view your files. No encryption key is needed, just the security code you assigned the recipient.

When the recipient opens your file, eDossea sends you a read receipt with the date and time the file was opened (Figure 4). This confirms that your file was received and prevents unnecessary resends.

The entire file-sharing process takes only a few minutes.



**Figure 2** Select the recipient from your eDossea address book.



**Figure 3** Add the record details and upload the files you want to share.

### Seamless Integration

We designed eDossea specifically for dental professionals to securely exchange electronic records. We wanted to integrate with Dentrrix, and we got certified as a Dentrrix Connected partner as soon as the program was available.

The cloud-based eDossea encryption and file-sharing service is faster than using encrypted email, and your recipients don't

Sent	To	Opened	Actions
02/18/2016 10:23am	slersten@gmail.com		<a href="#">View Details</a>

#### Recent History for this Record

Description	Who	When	Changes
Securely shared 1 record files with slersten@gmail.com using the Secure Code maxxie20.	Test Dentist	02/18/2016 at 10:23am	N/A
Created Record	Test Dentist	02/18/2016 at 10:22am	N/A

[View Full History](#)

**Figure 4** The read receipt includes details about the record.

have to pay any fees to see your files. It's seamlessly integrated with Dentrix, so it doesn't interrupt your office workflow to share files.

"We believe it should be just as simple to send as to

receive documents," says Sam Lersten, EVP of sales and marketing at eDossea. "It only takes 15 minutes to get up to speed. Our members can share with anyone, no matter what dental software they use. And, your recipients don't have to join eDossea."

Since the product was launched in 2012, more than 800,000 files have been shared via eDossea. Members pay a low monthly fee, and there's no limit on the number of files you can send. Individual file size is limited to 25 MB.

#### Other Benefits

There's no software to download, no hardware to buy, and no training required—for senders or recipients. In addition to easy file sharing, eDossea provides higher image quality than encrypted email systems (Figure 5).

Your images arrive undistorted by the standard compression/decompression used by email. They are preserved in their original formats, so images appear clean and sharp. This reduces the number of X-ray retakes and resend requests.

In addition to X-rays, you can send referral forms, patient notes, and more. Sharing documents electronically is more efficient than printing, cheaper than postage, and faster than mailing. It also cuts down paper use. And, you know exactly when your files are received and opened, as well as who opened them.

Using eDossea also gives you a secondary storage area for your client records. You can access your client information anytime, anywhere. This provides added peace of mind in case of a computer failure, natural disaster, or power outage in your office. "If non-member recipients have a problem with eDossea, we support them and walk them through the process," Lersten says.

#### Why Choose eDossea?

Consider the following experiences of three general dentists who now use eDossea:

- Dentist A received multiple files from a dental office that used eDossea. It was easier to access these files compared to the encrypted email options they used. When Dentist A needed to safely share patient files with others electronically, she joined eDossea due to the ease she'd experienced as a recipient.
- Dentist B used a secure email service but kept getting complaints from the offices that received his files. The receiving offices were having difficulty opening the files

and said the process was too cumbersome. Dentist B got tired of fielding complaints and spending time troubleshooting how to open the files he'd sent. Another dental office recommended eDossea, saying how easy it was to use. Shortly thereafter, Dentist B decided to become an eDossea member.

- The office manager for Dentist C, a Dentrix dentist, attended a HIPAA training meeting and came back wanting to get an encryption service for their office. After researching several options, she found eDossea. Because eDossea was integrated with Dentrix G6 and the others weren't, Dentist C signed up for eDossea. Their office was thrilled with the user friendly and seamless integration with Dentrix G6.



**Figure 5** Image files appear clear and sharp when recipients open them.

Ease of use is the common theme of these experiences. Unlike eDossea, most encrypted email programs require both senders and recipients to take several steps before they can send or access protected files. These steps usually involve exiting your practice management system and opening another program, then sharing encryption/decryption keys, and other time-consuming processes.

With eDossea, you simply click a button in your Dentrix toolbar and you're on your way. **DM**

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www.jakari.com



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Lighthouse  
www.lh360.com



**Patient Communication Solution**

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www.pandaperio.com



**Periodontal Practice Solution**

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Patient Activator  
www.patientactivator.com



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Practice Mojo  
www.practicemojo.com



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RecordLinc  
www.recordlinc.com



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Reputation  
www.reputation.com



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Sesame  
www.sesamecommunications.com



**Patient Communication Solution**

Sesame Communications helps dental and orthodontic practices harness the power of the Internet to accelerate new patient acquisition, build patient loyalty and transform the patient experience.



Solutionreach  
www.solutionreach.com



**Patient Communication Solution**

Smile Reminder provides patient engagement and communication solutions for healthcare practices. Utilizing the latest text, email, voice, video, web, and social media tools to communicate with customers.



TeleVox  
www.televox.com



**Patient Communication Solution**

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Text2Floss  
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**Patient Education**

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Transparent Aluminum  
www.transparentaluminumllc.com



**Dental Practice Solution**

Transparent Aluminum is a company focused on creating custom workable solutions for practices to get the most out of their Dentrix database.



U.S. Health Record  
www.teamlinks.com



**Intra-Office Communication**

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**Dental Practice Solution**

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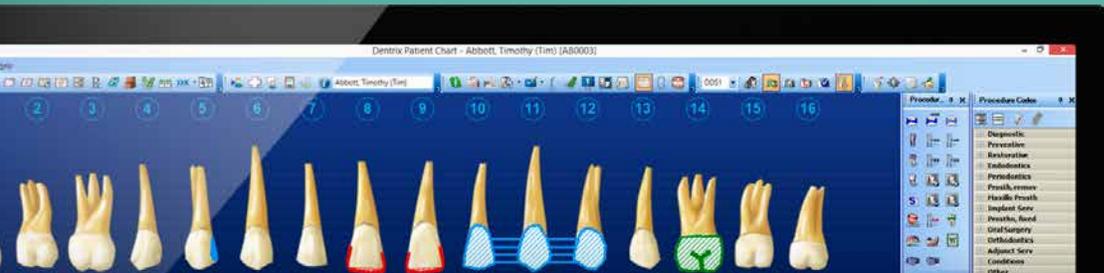
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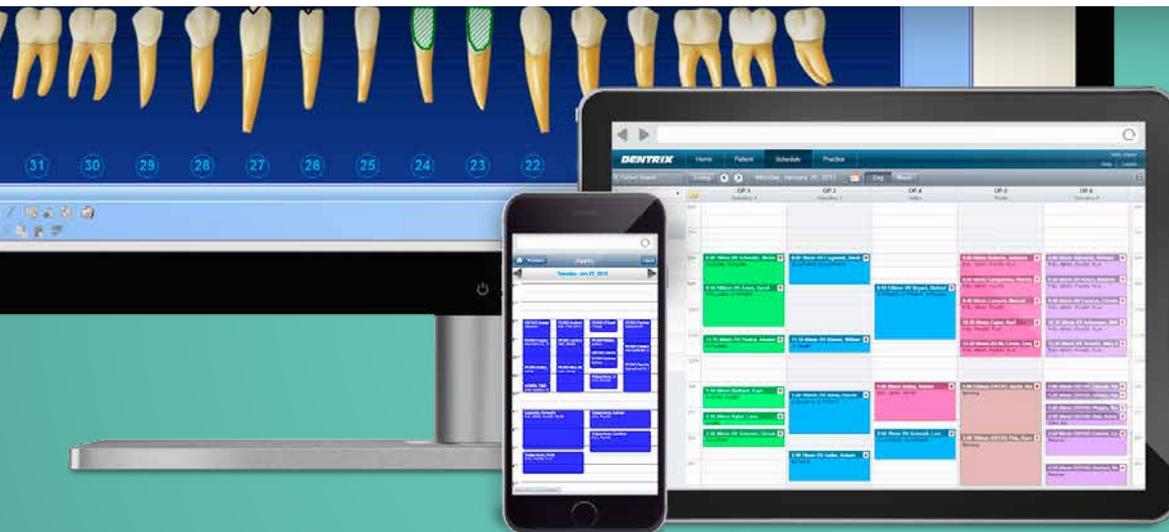
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