CUSTOMIZE YOUR DENTRIX PROGRAM TO YOUR STYLE OF PRACTICE

*Three Ideas to tailor Dentrix to fit your needs*

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Introduction

When you first installed your Dentrix software, you were busy. Busy with the conversion or adding patient information manually, busy learning the basics of the program, busy answering the needs and stresses of the staff as they learned the new program. Now that you have worked with Dentrix and you understand how it is set up, you may recognize that you can customize this program instead of leaving it with the pre-programmed defaults. In fact, the more you customize your Dentrix, the more you will stand out as unique and different to your patients – and you can improve your practice internally as well.

This report includes three articles that each share an approach to customizing your Dentrix software. These customization ideas will not be found in the standard Dentrix training program because they encourage each dentist to consider their style of practice and make the software fit the practice, rather than the practice fit the software. The three customization ideas include:

- Customizing your appointment book to improve scheduling
Once you begin customizing your Dentrix software, you may have many other ideas on how to make it perform to your style of practice. For example, you can edit each existing letter and create new ones. You can establish definitions for billing types, fee schedules, adjustments, etc. and then create each of these as needed. One of the real strengths of the Dentrix software is the ability to determine the information you need in a report or want to share through letters, and then you can save these reports and letters through the Office Manager.

Successfully customizing your Dentrix program takes a mindset of "What do I want to accomplish?" first - and secondly, "How can I do that with Dentrix?". The Office Manager screen allows you to run almost any report or set of data you can imagine. If you look at the criteria you can select under Letters, you will start to realize the flexibility Dentrix offers. Here are some examples of customized reports you can run:

- Wonder how many patients you saw last month that had no insurance at all? Perhaps you'd like to grow your non-insurance, fee for service patients and by looking first of all at how many new clients you saw that had no insurance and the secondly their referral source and finally looking through their ledger to evaluate what services you provided might help you to create marketing that targets this type of patient? Criteria you can select in the office manager, letters patient filter: first visit date for the month and last visit date for the month then in Data Fields checkmark the patient name, birthdate, city, primary insurance, referred by name. Once you run the data file only for this report, paste into excel and then sort by insurance name. Delete everyone with insurance so you can focus on your non-insurance patients. Now you can begin to profile this type of patient.

- Wonder how successful your recall patients are at keeping their teeth? Let's say you are applying for the Baldrige award in your state and you need to show that your patients have successful healthcare outcomes. You can run a report in office manager, letters by choosing patient filters: procedures - choose D1110 prophy completed and use a range of the last 6 months, next in Data fields you would select name, last visit date and continuing care last visit date. Run this data file only, paste into excel and then compare the two dates - if you see that a patient came in for another last visit date other than their continuing care date, that is a clue that this patient had some treatment accomplished. Then you would look into that patient's ledger to dig deeper to see what treatment was completed.
More Efficient Scheduling with a Customized Appointment Book View

What does your appointment book look like? Is it easy to see your hygienist’s next opening? Can you quickly see when your dentist has a half hour available to fit in an emergency exam? Does everyone on staff know when they can schedule a crown or a handful of fillings?

Most dentists never change the appointment book view from the day they install their dental practice management software. The default setup includes all providers on one page and identifies dentist and staff time with X’s /’s and blank squares. Depending on the number of providers, a practice could have several columns – which automatically shrinks the number of characters that show in an appointment. The fewer characters you can see, the less information you can convey at a glance. Instead, think about what information you want to see – and then alter your appointment book view to achieve that display. Here are a few ideas:

Use more than one page
You can create up to 12 different appointment book views. These are linked to the F keys at the top of your keyboard. To set these up in Dentrix, go to the Appointment Book page, then select View – this brings up a window where you see the number of views you have set up right now. To set up a new one, click New – that brings up a window that allows you to customize the view. Here you can select the Providers, Operatories (this is what will show as the columns across the top of the screen), Start hour and End hour. These hours are important because they affect how your schedule prints out – if you work until 7pm one evening and you leave the default at 8-5pm, you’ll never see your evening appointments on a printed schedule!

Next, you select the Days this provider works (I recommend choosing all but Sundays just in case your dentist or hygienist adds an unusual Wednesday sometime – you don’t want that skipped in your weekly view). You also select View Amount (if this isn’t checked then you won’t see any $ production in your appointments), View Notes and View Alerts. Finally, you can customize the order of information displayed inside each appointment – name, procedure, amount, phone, etc. Knowing how to easily change this view makes it a piece of cake to print a schedule for a dentist to make follow up calls at day’s end. Just change the order to include the phone number right below the patient’s name – and that will take care of all 2 unit or more appointments for the provider that day.

Group certain providers on one page
Look at each dentist’s team and set one page per team. If you have a general dentist that practices with an EFDA, then you can set up a separate column for the
dentist and the EFDA – that way you can see exactly when open time exists for either one. If you have a pediatric dentist running several columns – you can identify them separately here, and if you add multiple providers (EFD1, EFD2, etc.) then you can even track their production separately.

This approach works nicely for grouping all hygienists together as well. That way, when a patient calls to schedule a cleaning, the office manager can flip to the page showing all the hygiene schedules to find the first opening. Keeping this page separate from the dentist also expands the column size, so notes are easily shared between the office manager and the hygienist.

**Change whenever you like**

The nice part of the appointment book view is that since it is customizable, you can change it as often as you like. That gives you the flexibility to try out a new view with your team – and then a few weeks later, ask everyone how they like it. Has the view made it easier for the office manager to find open time? Are staff adding notes to the appointments seeing them more easily? Is it easier to train new staff as your appointment book becomes easier to understand visually? Even small changes can increase your team’s efficiency and patient care.
Manage ‘problem patients’ by using your ledger

“Mrs. Jones didn’t pay her bill again.”

“Mr. Johnson didn’t show up for his appointment.”

Problem patients – every dental practice has them. Patients that don’t pay their bills on time or at all. Patients that cancel appointments last minute or just plain don’t show up. Denture patients that come in 40 times for an adjustment. Ortho patients that constantly have broken brackets. These patients are a challenge to manage because they don’t flow smoothly through our recall and billing systems and their unique nature causes stress for staff that are required to deal with them.

To better manage problem patients, you need to recognize that they are a problem. This is most important in your collections process. The reality is that the patient who isn’t going to pay you, doesn’t tell you in advance, “Guess what? Once you save my hide by working me in for an emergency root canal, I’m not going to pay my portion after insurance!”

Track poor behavior in the ledger

To recognize problems, you need to identify the problem and then document it. You want to know when a patient doesn’t show up for an appointment. You want to know when a patient doesn’t pay their bill. First, decide what problems you want to track and then create a no fee ADA code with a description that clearly defines the problem.

Here are a few ideas:

- Cancelled appointment
- No show / Didn’t call
- Discussed missed appointments personally
- Outstanding balance
- Account sent to collection agency

No shows and Cancellations

For each of these codes, you need a system to consistently enter them for your patients. When a patient doesn’t come in for their appointment, what do you document in the chart? Do you put the patient’s name on a list to follow up and reschedule? You can add a no charge 9900 series code with custom descriptions to more clearly document your communications with these patients. Then, when this same patient calls back in a few weeks and requests an evening or Saturday appointment, you can handle him appropriately.

One new code we added to our Dentrix system last year was “Discussed missed appointments personally”. In our practice, if the patient cancels or no-shows more than once, then our secretary team is expected to give “the speech” as it’s become known. “The speech” tells the patient that we’re sorry he missed his hour long appointment with Laura and we want to let him know that was wasted time for our professionals because we don’t double book our patients. We also say something about the biggest cause of fee increases is to make up for dentists and staff
standing around when a patient doesn’t come in for their appointment. Finally, in our speech, we let the patient know that there is no charge today, but if they no show or cancel short notice in the future, then they will be charged. Once we talk with a patient and give this speech, we charge out “Discussed missed appointments personally”. So, in this patient’s ledger you might see two instances of “No show” or “Cancel” and then a “Discussed missed appointments personally”. That makes it very clear that this patient is aware they have missed appointments with the practice.

Patients that don’t pay their bills

Similarly, we track patients who don’t pay for their dental care. We follow a standard collections procedure for any overdue balances and when we’ve made every attempt, the dentist decides to either write off the balance or send the account to collection. If we write off the balance, we mail a letter to the patient letting them know they have an outstanding balance and they will need to pay it off before any future visits. Then, we charge out “Outstanding balance” in their ledger. For accounts we send on to a collection agency, we also send a letter to the patient and then we charge out “Account sent to collection agency.

Every time you check out a patient, you’re looking at the ledger. When you have documented these financial poor behaviors, the office manager can quickly see what kind of patient they are dealing with. In our practice, secretaries are trained to offer a variety of financial arrangements options to patients. Even more importantly, they are trained not to offer certain types of financial arrangements when they see that a patient has had trouble paying us in the past.

Better management with senior staff

As you know, it takes a higher level of skill from a dental office manager to handle problem patients than it does to handle regular patients. Patients with these poor behaviors sometimes want to defend themselves and can become argumentative. This is difficult and stressful on new or less-trained office staff. Another benefit of tracking poor behaviors in the ledger is that you can know when your difficult patients are going to be checking out at the front desk – and you can arrange to have your highest trained dental office manager handling these patients.

Creating systems for your problem patients, and documenting them in the ledger, helps customize your patient care and reduces staff stress. Some patients will still complain, and to smoothly manage patient complaints takes a separate system altogether. Establishing the steps your team will take when one of these problem behaviors occurs and then documenting the action taken solves problems quickly and efficiently.
Manage case acceptance by using your ledger

Think about the most recent large case you presented. Did the patient nod and smile at you while you described the steps involved in bringing her mouth back to health? Did she say that she wanted treatment right away? Now, are you wondering why you haven’t seen her in your schedule?

Being successful at gaining case acceptance on large cases is critical for running a successful dental practice. Most general dentists enjoy the challenge of tackling a complex case so they can use their skills to the fullest. It’s also personally rewarding to bring a patient up to an acceptable level of health and watching this person develop more self-confidence and pride in their appearance. It’s also financially rewarding. As Steven Covey might say, the large cases are the ‘big rocks’ that help fill schedules and fill bank accounts. (To watch an oldie, but goodie of this concept in video, google “Steven Covey big rocks video”.)

You can use the Dentrix ledger to manage your case acceptance. First, you need to charge out your case presentation – create a no-fee code with the description “Consultation” or “Conference” since this will print on a walkout statement. Then, treatment plan this code in the appointment when you plan to present your large case. At the end of the month (or week) run a report to find everyone that has been charged out for this code. Look to see if there is a large credit on the account, indicating the patient paid some amount down for future treatment. Check to see that this patient has either completed the first steps of treatment or that they are scheduled to return.

What is your batting average?

At the end of each month, compare the number of patients that had a case presentation with the number that are moving forward with the treatment plan. If you present 10 cases and 8 accept, set up financial arrangements and schedule their first visit, then you can count these 8 as accepted and in progress. So, 80% would be your batting average. Calculating the batting average for each dentist in your group helps to provide valuable feedback and is an indicator of successful dental practice management.

The dentists can discuss their successful and failed cases and exchange ideas to improve. They also can use the failed cases as a call list to try to fill schedules later on. It makes a difference when the dentist calls. By simply taking the time to call the patient saying “I’m following up on a conversation you and I had last month where we talked about dental treatment for you – I wanted to offer to answer any questions you might have if you’re still thinking about getting that dentistry done – can I answer anything for you?” Usually, this starts a very nice conversation and
hopefully the dentist wraps up by offering to have his treatment coordinator set up financial arrangements and schedule the visit.

### Tracking orthodontic success

Orthodontists can use this same approach to track their success at gaining different types of cases. By charging out code D8000 Ortho initial exam or D8001 or D8002 Ortho re-eval, again at no fee (most orthodontists aren’t charging for new patient visits anyway) and tracking the kind of case presented and accepted, the orthodontist can see his success rate with Phase 1, full braces, invisalign, etc. Some of this work is manual – looking to see if treatment has been started or scheduled takes time, but the feedback for the orthodontist is worthwhile. If a trend starts to develop – for example, successful at starting 70% of full braces cases, but only 30% of phase 1 cases, then it makes sense to look at the phase 1 approach to look for ways to improve. Same for invisalign or even limited treatment on adults.

### Tracking pediatric sedation cases

Another way to use the ledger is to track pediatric oral and IV sedation cases. Again, I’m targeting these cases because they are generally more complex and expensive than regular treatment plans. When you charge out D0150 comprehensive exam for children and compare that with the oral sedation and IV sedation codes, you can see your success rate for doing these type of cases.

### Tracking wisdom teeth cases

This same approach makes sense for oral surgeons as well. Charge out the D0150 comprehensive exam for wisdom teeth extraction and then look in the ledger at end of month to see if the case is completed or scheduled. Again, for cases that do not schedule, your oral surgeon can take these patient names and make a follow up call to answer questions and try to get this patient into your schedule.

### Tracking trends and comparisons

Using the ledger to track case acceptance and provide feedback to dentists is one of the most valuable coaching mechanisms available in dental practice management software. It can be easy for one dentist to blame a patient’s finances for his lack of success with these large cases – but when another dentist in the same group has a markedly better track record the conversation usually changes to asking “How do you do it?”. Since the reality of our economy is that patient finances really do affect large case acceptance - spending time looking at the black and white results can
also open up some conversations about financial arrangements policy and options. Dentists may want to start to offer phased treatment – and then again, track their success.

I’ve been tracking large case acceptance for every general dentist and specialist in our group for over 6 years using Dentrix – so if you have any questions about how to set up this approach in your own office, feel free and contact me. I want to help you to run a dental practice successfully. A dental office manager has an opportunity to go above and beyond by establishing this type of tracking and then providing an end of month report to her dentist or specialist.

**Checklist of Ideas**

Are you ready to customize your Dentrix software? Here’s a checklist to review each of the areas discussed in these articles:

- Set up each dentist team on a separate page in the appointment book
- Set up the hygienists on their own page
- Consider creating separate columns for the dentist and EFDA to more accurately track dentist time
- Set the order and type of information shared inside each appointment (remember you can switch this easily to show the phone numbers under patient names for a quick print for a dentist to call her major treatment cases that day)
- Consider creating no fee 9900 series codes for:
  - Cancelled appointment
  - No show / Didn’t call
  - Discussed missed appointments personally
  - Outstanding balance
  - Account sent to collection agency
- Track case acceptance for GPs & specialists - create a no fee code for Consult or Conference
  - Orthodontists – Track D8000, 8001, 8002 new patient exams and compare to full braces, phase I, invisalign and adult braces
  - Pediatric Dentists – Track your consult code and compare to your oral sedation or IV sedation codes
  - Oral Surgeons – Track your D0150 comprehensive exams compared to your treatment completed
As you look at your style of practice and you set up Dentrix to provide you the information you need, you need to train your staff. Review how each of these changes makes your Dentrix program work more efficiently and provide you with the data you need to fill schedules, discipline problem patients and increase case acceptance. Invite your staff to share their ideas on how to customize the program to improve the flow of your practice, reduce wasted time and increase quality of care.

In fact, now that you are using Dentrix to provide you with excellent reporting, you can use this information every month to run a successful staff meeting. Review your case acceptance for the month with the whole team – and for patients that failed, ask for ideas to improve. Have the office manager share the number of patients that received ‘the speech’ – the clinical staff will appreciate this effort to avoid last minute holes. Look at dentist and hygienist schedules as well and talk about how to increase productivity and efficiency. The more ideas you can gather from staff to improve the practice, the more opportunities to improve you will receive. Plus, the focus is on real results, not emotions. If you decide to set specific goals, now you have a way to measure the outcomes. And, if your budget allows, you can add a bonus structure – now your staff will really want to see your numbers!