

# dentrix

MAGAZINE

## Master the Metrics that Matter

Discover the five key performance indicators  
that reveal the health of your practice.

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in Dentrix G6**

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and don't miss out on the most up-to-date Dentrrix information!

## Dentrix Mastery Tracks

# SPOTLIGHT

Dentrix Mastery Tracks™ allows dental professionals to test how well they understand and can use Dentrix. Read on to find out about Leslie Garabedian, an office manager who has completed all eight Mastery Tracks tests and earned all four specialist certificates.



**LESLIE GARABEDIAN** | OFFICE MANAGER

### Where do you work?

Belmont Dental Associates in Haledon, New Jersey

### What is your title?

Office Manager

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

I'm in charge of overseeing day to day operations, monitoring policies in the office, presenting and closing treatment plans, setting up financial arrangements, practice marketing, employee hiring and training, collections and account receivables, payroll, maintaining relationships with local business and municipal government, and instituting and maintaining the therapy dog program in our office.

### How long have you worked with Dentrix?

3 years

### 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 liked the idea of taking the tests myself to be able to review my current skills, including my strengths and my weaknesses. From an office manager standpoint, I think the tests are great

to give to the staff to see where their weaknesses are. It gives me the ability to help and train them to improve. I also think it's valuable from a hiring standpoint to see how knowledgeable potential applicants are.

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

It gave me the ability to pinpoint areas where I need to improve. I also learned a few things I wasn't aware of...like how to chart supernumerary teeth! If I came across something I didn't know, I was forced to research it, which in turn helped me learn additional Dentrix functions.

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

Being a Dentrix specialist is a way to prove my knowledge with the Dentrix software as well as my knowledge in the dental field. It shows that I have taken the time and effort to educate myself to learn and hone my skills as a dental office manager. Being more knowledgeable in Dentrix has helped increase office efficiency and allows us to run more smoothly on a daily basis.

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

There are a lot of Dentrix tips/tricks that I use and love, but two of my favorites are using the Verify Billing Statements to Send option and using procedure buttons when treatment planning.

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.

## ▼ eCentral Smart Messaging

Appointment attendance is critical to the health of your patients and the success of your practice. Regular hygiene and preventative care leads to better overall health, but you can't treat patients who don't attend their scheduled appointments. New eCentral Smart Messaging helps you solve this problem in three ways.

First, the new Smart Messaging feature ensures that Dentrix and eCentral sync in real time so that your reminders will always be accurate. Patients get reminders for appointments that have been updated and moved to a different day or time, giving you peace-of-mind that your reminders will always match your Dentrix Appointment Book.

Second, the new Smart Messaging feature helps you avoid the problem of over-communication: bombarding the patient with so many messages they build a negative impression. eCentral

Smart Messaging allows you to set a hierarchy for email, text, and postcard. This means that eCentral will look through all of the patient contact information and deliver a single reminder to the patient based on a hierarchy you define.

The third problem that Smart Messaging solves is incomplete patient contact information. On average, nearly two-thirds of your patients will not have a complete set of contact information (mobile number, email, and mailing address). Looking through the Family File and deciding how to contact each patient individually is not the best use of your time. Smart Messaging will look through all of the patient contact information and deliver a single reminder to the patient based on the contact information you have on file.

Smart Messaging is available now. For more information or to order visit [dentrix.com/promotions/smartmessages](https://www.dentrix.com/promotions/smartmessages).

## ▼ Announcing New Insurance Payor Connections

### Dentrix Attachments

Payor ID	Payor Name
86098	AmeriHealth DC Medicaid - Avesis
86098	AmeriHealth MI MMP (Medicare/ Medicaid) Avesis
62308	Caterpillar (A Cigna Plan)
36215	Central States Fund
36215	Central States Health & Welfare Funds
36215	Central States SE & SW Areas H & W Fund
62308	Compass Group (A Cigna Plan)
62308	Cracker Barrel Old Country Store (A Cigna Plan)
62308	Delphi (A Cigna Plan)
62308	Deluxe Corp (A Cigna Plan)
46278	DHW FL Medicaid Adults
46278	DHW FL Medicaid Children
46278	DHW FL Medicaid Long Term Care (LTC)
46278	DHW Medicare Advantage
62308	Federal Reserve (A Cigna Plan)
62308	FedEx (A Cigna Plan)
62308	Govt. District of Columbia (A Cigna Plan)
62308	Kellogg (A Cigna Plan)
62308	Lacera (A Cigna Plan)
62308	Lowe's (A Cigna Plan)
62308	McKinsey (A Cigna Plan)
CX014	Medicaid VA Smiles for Children Over 21
62308	Phillip Morris/ Altria (A Cigna Plan)
62308	Shelby Schools (Memphis City Schools)
62308	Shell Oil (A Cigna Plan)
62308	St Gobain (A Cigna Plan)
62308	St of CT (A Cigna Plan)
62308	Sun Trust (A Cigna Plan)
36215	Teamcare
62308	Wyndam (A Cigna Plan)

### Dentrix eClaims

Payor ID	Payor Name
39640	A & D Charitable Foundation Inc. (dba GreatLake PACE)
53589	Arizona Blue Cross Blue Shield
16180	Aspen
99660	Central Valley Medical Services (dba Fresno PACE)
66698	Comprehensive Senior Care Corp (dba Centra Care)
8754	Eddy Senior Care
CBFLF	Florida Blue FEP
59143	Harrington Health Colonial Dental
71498	LifeCircles PACE
AFSOH	Ohio AFSCME Care Plan
70454	PACE CNY
96400	San Diego PACE
64009	Valir Pace
48123	Via Christi HOPE

### Dentrix Insurance Manager

Payor ID	Payor Name
CKVA1	DentaQuest Government Plans (Medicaid of Virginia)
47171	Kansas City Blue Cross Blue Shield of Kansas City MO

### Dentrix eEOBs

Payor ID	Payor Name
CBUTF	Blue Cross Blue Shield of Utah (FEP)
CBUT1	Blue Cross Blue Shield of Utah (UHIN)
CX010	Health Partner of Minnesota - Medicaid

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

“Productivity is up 25%,  
and I attribute it, in part,  
to the seamless integration  
of new technology into  
our practice.

And our patients  
and staff love it!!”

*Michael Corson, DDS*  
Denver, CO

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# Three Ways You Can Help Us Improve Dentrrix



## Share your input and help shape the future of Dentrrix.

It's been almost two years since I became the product manager for Dentrrix. In my first *Dentrrix Magazine* article in the spring of 2014, I discussed the changing dental landscape and the need to work more closely together to chart a course for the future. I am pleased with the number of people who have participated over the last two years in helping to shape the future of Dentrrix. I want to take this opportunity to remind you of existing methods to share your ideas and enhancements with us and a new method that we are introducing this year.

In 2014, we instituted the Dentrrix Advisory Committee. This group of approximately 200 people, including IT professionals, dentists, office managers, hygienists, assistants, scheduling coordinators, billing coordinators, and more, have participated in focus groups, surveys, product demonstrations, and other activities to help us understand how we can continue to increase the value of Dentrrix for all of our customers. This group continues to play a valuable role as we move forward with Dentrrix. If you are interested in participating on the committee, please email me at [brad.royer@henryschein.com](mailto:brad.royer@henryschein.com).

In addition to the committee, we constantly review the [myvoice.dentrrix.com](http://myvoice.dentrrix.com) site, which currently has over 2,061 suggestions and over 10,400 unique supporters. In Dentrrix G6, we made this website even easier to access by adding the "Enhancement Request" option to the Help menu in

all Dentrrix modules. No matter where you are in Dentrrix, it's easy to let us know how we can improve your Dentrrix experience. In addition, we have started to update the status of items as we research, plan, and develop future releases. We hope to increase transparency so you know what we are working on and we can continue to receive feedback during the development process. If you have not yet had a chance to add, review, or vote on an idea, I would strongly encourage you to visit the site.

I am also happy to report that in addition to these methods, we are adding another way for you to share feedback with us this year. At our Business of Dentistry Conference, which is being held in Orlando, Florida from October 7-10, we are holding eight focus group sessions for users to come and meet directly with me. The topics we will cover include support, reports, front office, and chairside enhancements. I would love to see you at this event! Moreover, I look forward to the opportunity to discuss how we can continue to make Dentrrix meet your changing needs.

I know that as we work together, we can improve efficiencies, lower costs, enhance clinical decision-making, and increase capacity for dental professionals using Dentrrix. Thank you for all of your ideas and for your dedication to Dentrrix! I can't wait to see you at our Business of Dentistry Conference focus groups. **DM**

**BRAD ROYER**  
Dentrrix Product Manager



# DENTRIX

## INSIGHT SEMINAR

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ONLY  
\$  
**49**

**Go beyond the basic features of Dentrix and discover better ways to:**

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

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

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

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

# 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

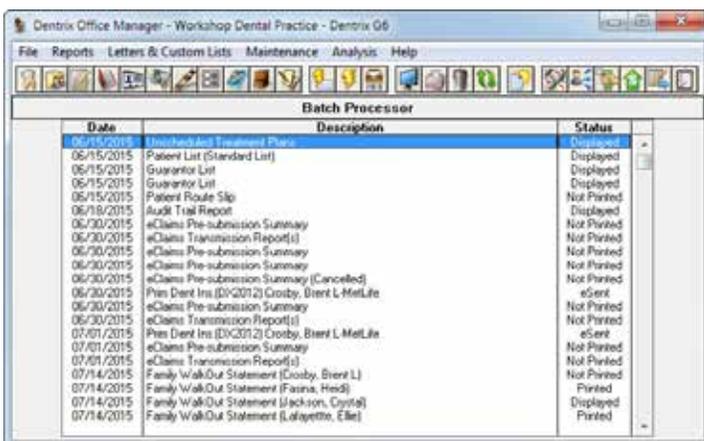


Clinical



## Save Time in the Batch Processor

Did you know that you can preview any report in the Batch Processor by double-clicking it? This feature, available in Dentrix G5.2 or later, saves you from having to first select the report and then click the Preview button. It's a small thing that can save you many cursor movements over the course of a day!

Date	Description	Status
06/15/2015	Unscheduled Treatment Plans	Displayed
06/15/2015	Patient List (Standard List)	Displayed
06/15/2015	Guarantor List	Displayed
06/15/2015	Guarantor List	Displayed
06/15/2015	Patient Route Slip	Not Printed
06/19/2015	Audit Trail Report	Displayed
06/30/2015	eClaims Transmission Report(s)	Not Printed
06/30/2015	eClaims Pre-submission Summary	Not Printed
06/30/2015	eClaims Pre-submission Summary	Not Printed
06/30/2015	eClaims Pre-submission Summary (Cancelled)	Not Printed
06/30/2015	Print Dent Ins (DIX-2012) Crosby, Brent L, MetLife	eSent
06/30/2015	eClaims Pre-submission Summary	Not Printed
06/30/2015	eClaims Transmission Report(s)	Not Printed
07/01/2015	Print Dent Ins (DIX-2012) Crosby, Brent L, MetLife	eSent
07/01/2015	eClaims Pre-submission Summary	Not Printed
07/01/2015	eClaims Transmission Report(s)	Not Printed
07/14/2015	Family WalkOut Statement (Crosby, Brent L)	Not Printed
07/14/2015	Family WalkOut Statement (Fasina, Heidi)	Printed
07/14/2015	Family WalkOut Statement (Jackson, Crystal)	Displayed
07/14/2015	Family WalkOut Statement (Lafayette, Elise)	Printed

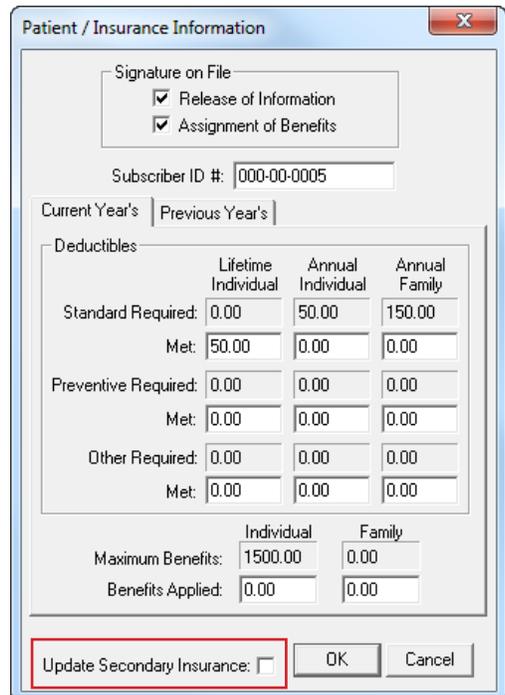
## Updating Secondary Insurance

Since insurance coverage is not retroactive, Dentrix tracks what secondary insurance information was assigned to the patient when a primary insurance claim was created. Dentrix assumes that if the patient did not have secondary insurance assigned (or had a difference in coverage) when the primary insurance claim was created, any new secondary insurance information does not apply to that claim. The Update Secondary Insurance option allows you to override the default if a mistake in assignment has been made.



To update secondary insurance information:

1. Verify the secondary insurance information in the Family File is correct.
2. From the Ledger, double-click the primary insurance claim. The Primary Dental Insurance Claim window opens.
3. Double-click the Subscriber Information block. The Patient/Insurance Information dialog box appears.
4. Check the Update Secondary Insurance box, and then click OK.



**Patient / Insurance Information**

Signature on File

Release of Information

Assignment of Benefits

Subscriber ID #: 000-00-0005

Current Year's | Previous Year's

Deductibles:

	Lifetime Individual	Annual Individual	Annual Family
Standard Required:	0.00	50.00	150.00
Met:	50.00	0.00	0.00
Preventive Required:	0.00	0.00	0.00
Met:	0.00	0.00	0.00
Other Required:	0.00	0.00	0.00
Met:	0.00	0.00	0.00

Maximum Benefits: Individual 1500.00 Family 0.00

Benefits Applied: Individual 0.00 Family 0.00

Update Secondary Insurance:  OK Cancel

## Sorting and Filtering Progress Notes

If you've ever had to look through a patient's progress notes in the Chart to find information about a specific procedure or find treatment during a certain time period, then you know what a daunting task this can be for a patient who has had a lot of work posted.

Here are a few different methods you can use to sort progress notes and change how the information is displayed, making it easier to find the information you need.

1. **Sorting progress notes by column** - Click the column headings to arrange the information chronologically, numerically, or alphabetically (depending on the column you select).

2. **Use status buttons to narrow your search** -

Progress notes can be viewed by treatment status. To make it easier to look through the progress notes, turn on only the status button for the type of procedures you are looking for: treatment plan, completed, existing, conditions, exams, or referrals.

3. **Viewing clinical notes** - If what you are looking for would be found in the clinical notes for a procedure, you can either switch to the **Clinical Notes** tab or view the clinical notes within the progress notes by clicking the **Clinical Notes** button. When you view clinical notes within the progress notes, you can sort them by column to make finding what you want a little easier.

4. **Painting progress notes** - You can have the paint colors assigned in the Graphic Chart correspond to the color of your progress notes, which may help you locate them more quickly. To coordinate your progress note color with your paint colors, from the Chart menu, select **Setup > Chart Display Setup**. In the **Chart Display Setup** dialog box, check **Use Paint Colors for Progress Notes**. Then click **OK**.

Try out some of these sorting features in the Progress Notes panel. Many of them can be combined for a more in-depth sorting experience (combine the sorting of columns with the selection of certain status buttons, for example). And if you need to undo all your column sorting and start all over from scratch, click the **Default Sort** button, which sets procedure notes back to a chronological order with the oldest notes at the top of the list.

Date	Tooth	Surface	Code	Provider	Description	N	R	D	M	Status	Amount
08/12/2012			D0150	DDS1	Comprehensive oral evaluati...					C	80.00
09/06/2013	28	DO	D2392	DDS1	Resin composite-2s, posterior					C	210.00
10/06/2014			D0150	DDS1	Comprehensive oral evaluati...					C	80.00
10/06/2014	7	LF	D2331	DDS1	Resin-two surfaces, anterior					TP	185.00
10/14/2014	LL		D4341	DDS1	Perio scale/root pln-4+per qu...					C	230.00
10/14/2014	LR		D4341	DDS1	Perio scale/root pln-4+per qu...					C	230.00
04/06/2015	1		D7140	DDS1	Extract.erupted th/exposed rt					TP	155.00
04/06/2015	5	LB	D2392	DDS1	Resin composite-2s, posterior					TP	210.00

## Searching for Payments

Have you ever had to research an insurance payment that you know you entered into Dentrix, but you don't know who the payment was posted to? Or, have you ever had a patient call you to talk about a payment they made "earlier this year" that they have questions about? You can use the Search Payments utility to find specific payments that have been posted to the Ledger without having to manually look through patient accounts or running reports. You can find payments using the information you have, such as check number, date, insurance carrier, payment type, amount, or guarantor.

To use the Search Payments utility:

1. From the Ledger, click **File > Search Payments**. The **Search Payments** dialog box appears.
2. Enter the search criteria you want to use to search for the payment(s). You can combine several search criteria for a more precise search with fewer results.
3. When you have entered your search criteria, click **Search**.

Any payments matching your criteria are listed. Double-click any payment listed to open the Ledger for that patient so you can view the payment in more detail.

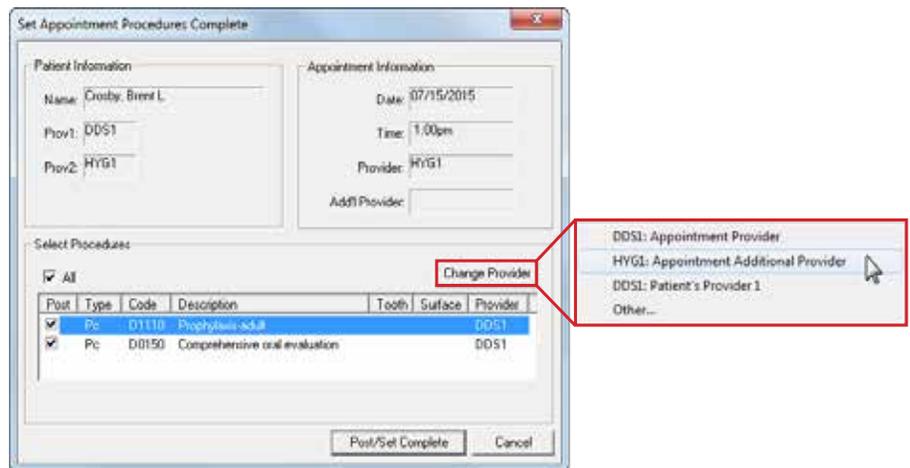
Proc Date	Entry Date	Name	Subscriber	Description	Insurance Carrier	Bank/Branch	Check
02/27/2015	02/27/2015	Crookly, Brent L.	Crookly, Brent L.	Insurance Check Payment	MetLife		
02/05/2015	02/05/2015	Kamal, Jane	Kamal, Todd J	Insurance Check Payment	MetLife		254566
02/05/2015	02/05/2015	Kamal, Marlene	Kamal, Todd J	Insurance Check Payment	MetLife		
02/05/2015	02/05/2015	Kamal, Marlene	Kamal, Todd J	Insurance Check Payment	MetLife		254566
02/04/2015	02/05/2015	Orbach, Edwin	Orbach, Edwin	Insurance Check Payment	MetLife		67448

## Assigning Providers to Procedures before Posting Them

One of the new features in Dentrux G6 is the ability to assign providers to individual procedures in an appointment before setting it complete. For example, if you have an appointment with an exam performed by the doctor and X-rays and a prophy completed by the hygienist, then you adjust the providers before posting it complete. When you set the appointment complete in the Appointment Book, you can assign procedures to different providers, and double-check that the correct provider is assigned to each procedure.

To set procedures complete for an appointment with multiple providers:

1. In the Appointment Book, select the appointment you want to set complete.
2. From the toolbar, click the **Set Complete** button. The **Set Appointment Procedures Complete** dialog box appears.
3. By default, the procedures associated with the appointment are listed in the **Select Procedures** group box, with a check mark in the **Post** column, and assigned to the patient's appointment provider in the **Provider** column.
4. Uncheck any procedures that were not completed during the appointment, if needed.
5. To change the provider for a procedure, select the procedure in the list and click the **Change Provider** button.
6. Select the appropriate provider for the selected procedure. Click **Other** to open the **Select Provider** dialog box from which you can select any active provider in the practice, if needed. The provider name changes for the selected procedure.
7. Click **Post/Set Complete**.



The appointment color changes to gray in the Appointment Book and Dentrux posts the procedures to the Ledger. For more information about other new features of Dentrux G6, including information on how you can upgrade, visit [www.g6.dentrux.com](http://www.g6.dentrux.com).

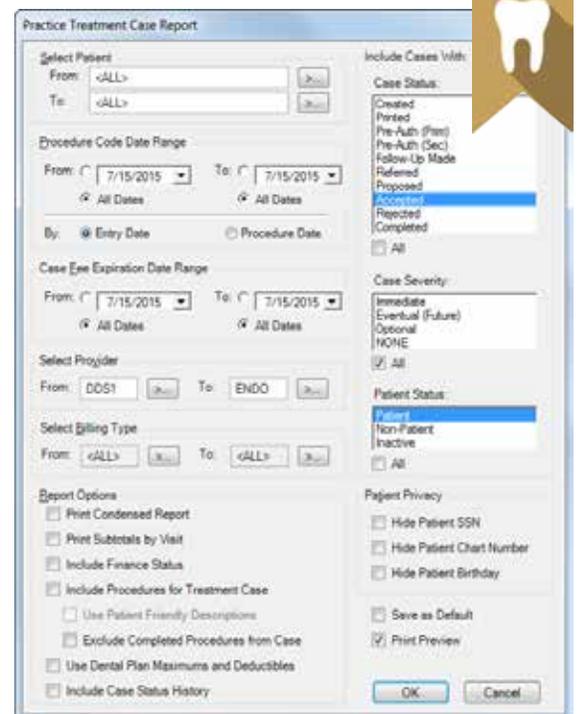
## The Practice Treatment Case Report

Outstanding treatment plans can be one of the most valuable sources of revenue for your practice. It's important to track how well you are doing with case acceptance and to find outstanding treatment so you can make sure you are addressing your patients' health needs and being as profitable as possible. The Practice Treatment Case Report shows a detailed report of all patients with treatment plans. With this report, you can see the total number of accepted and rejected cases.

To print the Practice Treatment Case Report:

1. In the Treatment Planner, from the **File** menu, click **Print > Practice Treatment Case Report**. The Practice Treatment Case Report dialog box appears.
2. Use the filters within this dialog box to select the range of patients, procedure codes, case status, etc. that you want the report to include.
3. To save your custom report settings for the next time you run the report, check **Save as Default**.
4. To preview the report before printing, check **Print Preview**.
5. Click **OK** to print the report.

Similarly, you can print a Patient Treatment Case Report to see a detailed report of treatment plan cases for a specific patient. First select a patient in the Treatment Planner, and from the **File** menu, click **Print > Patient Treatment Case Report**. Apply filters as needed, and preview or print the report.





## Put more of Dentrix to work for you.

Ever wonder if you're doing things the hard way? Find out what tools you're not using at a Dentrix workshop. Coming to cities nationwide this fall!

### Insurance: Billing and Collections

Do it right to get paid faster



6 CE CREDITS

Gain an in-depth understanding of how to correctly bill insurance in order to increase claim acceptance and collect more quickly and easily. Includes new G6 Ledger!

**\$299** per person 1-day class for experienced Dentrix users  
9 am - 5 pm

### Accounts Receivable Management

Take control of your patient A/R



6 CE CREDITS

Learn to simplify the billing statement process, enhance the effectiveness of collections efforts, and properly track and manage important A/R routines. Includes new G6 Ledger!

**\$299** per person 1-day class for experienced Dentrix users  
9 am - 5 pm

### Treatment Planning and Case Presentation

Create and present treatment options effectively 6 CE CREDITS



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

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9 am - 5 pm

### Clinical Charting

Move beyond just posting procedures 6 CE CREDITS



Discover features that make charting easier and more efficient. Learn to create thorough, accurate clinical records in the Dentrix Patient Chart and Perio module.

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9 am - 5 pm

### Essentials Workshop

Master the basics



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# MASTER THE METRICS THAT MATTER

**TAMMY BARKER**  
Senior Product Manager



## Discover the five key performance indicators that reveal the health of your practice.

**T**he best way to be successful is to maximize the productivity and efficiency in your practice. How? By understanding and managing the key performance indicators (KPIs) in your practice on a regular basis.

Just like your blood pressure, body weight, and cholesterol numbers indicate your physical health, your KPI numbers indicate the financial health of your practice.

Monitoring your KPIs and taking action to improve them can help you eliminate waste, optimize production, improve efficiency, and drive higher profitability. Mastering the metrics that matter gives your practice a competitive edge.

Which KPIs matter most to practice profitability? Henry Schein has researched this question extensively. After measuring dental practice success for more than 20 years, we recommend dentists focus on these five KPIs: active patients, active patients in hygiene, production, accounts receivable, and schedule optimization.

### **KPI #1:** **Active Patients**



#### **The Pulse of Your Practice**

Your active patients—the number of patients who visited your office in the past 18 months—is the #1 KPI because it affects the current and future cash flow of your practice.

Think of your active patients as the pulse of your practice. A steady increase in active patients from month to month is a sign of a healthy, growing practice. If your active patient base shrinks, overall cash flow will soon shrink as well.

Your practice management software can help you track your active patients. Once you identify your active patient base number, start working to stabilize and increase it.

Set monthly, quarterly and yearly goals to grow your active patient base. Involve your team in growing this number by encouraging follow-up visits and new patient referrals.

How you enter a patient into your database for the first time can help you track the source of your new patients. Take the time to enter new patient information accurately, including specifying the referral source (Figure 1). Over time you can see where your best referrals are coming from and nurture those sources.

**Figure 1** Entering referral sources in new patient appointments helps you identify your best referral sources.

### ✓ What to Do

If your number of active patients is declining from month to month, it's time to take action.

To maintain a healthy patient base, the average practice should see between 20 and 25 new patients per month. If your active patient base isn't growing, try this:

- Follow up on patients who are overdue in hygiene.
- Ensure the patients coming in today are set up correctly in the scheduling system so their continuing-care future due dates are accurate.
- Track where new patients are coming from and focus on the marketing activities that yield the greatest results.

## KPI #2: Active Patients in Hygiene

### Your Primary Growth Source

Your active patients in hygiene—the number of patients with a hygiene appointment in the past 12 months—is a crucial metric for two reasons:

1. It forecasts the number of active patients you will have over the next 12 months.

2. It is the primary source of growth and production for your practice.

Forecasting your active patients in hygiene lets you know if your practice is on track to achieve your financial goals. If your active patients in hygiene start to decline, you can take corrective measures to bring the numbers up before another six months go by.

Ensuring that patients are scheduled to return for their hygiene visits every six months also helps maintain and increase your active patient base (KPI #1).

### ✓ What to Do

Look at the number of patients seen in hygiene and the number of patients who have scheduled return appointments in the next six months. If the number of hygiene reappointments falls below 85 percent of the active patients in hygiene number, it's time to take action. If your hygiene patients aren't reappointing, try this:

- Use the Continuing Care module to track the due dates and last visit dates of your hygiene patients.
- Set up standard routines to encourage and remind patients to schedule hygiene appointments before their due date.
- Attach continuing care to each patient coming through your practice.

## KPI #3 Production

### A Healthy Hygienist/Doctor Mix

Tracking the production numbers for hygienists and for doctors separately lets you know who is doing the work, what the work is, and how much revenue your practice can expect from each provider.

A healthy mix of hygiene and doctor production is vital for practice profitability. An average production mix of 65–75 percent for doctors and 25–35 percent for hygiene is ideal.

The Dentrax Practice Advisor Report can help you track production by provider, overall production, case acceptance, outstanding treatment plans, reappointment rates and other areas that affect practice profitability.

### ✓ What to Do

If hygiene production falls to 15–20 percent of your total practice production, it's time to take action. If your production numbers are down, try this:

- Discuss production numbers in your daily huddle meetings.
- Ask the team for ideas on how each team member can improve case acceptance, patient care and overall production.
- Help patients overcome financial worries, fear of invasive procedures, and other barriers to treatment by openly discussing their concerns.

## KPI #4 Accounts Receivable



### Easy to Measure, Hard to Do

The accounts receivable management KPI shows whether your practice is actually making money. Profitable practices set a goal to collect at least 98 percent of their total adjusted production (gross production minus adjustments).

For example, if your monthly gross production (the sum of the fees you normally charge patients) is \$80,000, and your monthly adjustments (discounts and insurance write-offs) are \$16,000, your total adjusted production is \$64,000. Your collection goal for that month would be \$62,720 (98 percent).

The way you manage your accounts receivable determines your profitability. While this may seem obvious, many practices fail to compare their outstanding A/R to their production each month.

Dentrix can provide valuable insight into accounts receivable so you can take the appropriate measures to get paid. Monitor the following A/R figures at least once a month:

- Account balance aging (30, 60 and 90 days)
- Pending insurance claims aging
- Daily over-the-counter collections
- Total collections
- Totals by provider

The sooner you can address a collections issue, the more likely you'll get paid. Outstanding balances beyond 30 days should be targeted first. Once a balance ages beyond 90 days, you lose 7 percent of the value of that balance every month. By the time the balance ages 12 months, your practice has lost more than the balance is worth.

### What to Do

If your monthly collections rate is lower than 98% of your adjusted production totals or if you have outstanding balances that are over 30 days past due, try this:

- Provide third-party financing options to help your patients afford necessary treatment.
- Put a written financial policy in place and make sure your patients understand it and your team reinforces it.
- Help your patients pay on time by setting up electronic payment plans.
- Flag balances that are more than 60 days overdue and call these patients ASAP.
- File insurance claims electronically.

## KPI #5 Schedule Optimization



### The Fuller the Better

Schedule optimization is the cornerstone of an efficient and profitable practice. Managing your schedule effectively can minimize team stress, increase patient satisfaction, and maximize production.

Properly setting up your Appointment Book affects several key metrics of practice success, including:

- Average hourly production
- Production by procedure
- Unfilled hours
- Scheduled hours
- Number of broken appointments not reappointed
- Revenue lost from broken appointments

Unfilled hours in your schedule directly affect your bottom line. Losing one hour of hygiene time per day over a 210-day year can cost your practice more than \$30,000 in a year. Losing one hour of dentist time per month can cost your practice more than \$144,000 in a year.

**IMPROVE  
COLLECTIONS**

**TOTAL PRODUCTION  
- ADJUSTMENTS**

**ADJUSTED  
PRODUCTION**

**ADJUSTED PRODUCTION  
X .98 (98%)**

**COLLECTIONS GOAL**

## ✓ What to Do

Unfilled provider time means lost production. Monitor your schedule regularly, and when you see that providers have open time in the schedule, use the tools in Dentrix find patients to schedule. To help fill unscheduled hours, try this:

- Use the ASAP List to find patients who want to come in sooner than scheduled.
- Use the Open List to find patients with flexible schedules.
- Use the Unscheduled List to track patients who cancel or miss appointments and contact them to reschedule when you have openings.
- Reach out to patients with postcards, emails, and text messages to remind them that they have unscheduled treatment plans and encourage them to schedule.

## Next Steps

### Implement and Manage KPIs

Analyzing your practice performance based on specific numbers gives you a better understanding of your practice's strengths, weaknesses, and opportunities.

In Dentrix, for example, you can run the Practice Advisor Report to see your KPIs at a glance. This report shows your active patient base, active patients in hygiene, practice production, accounts receivable, schedule optimization, and many more indicators of your financial health. You can also compare your current performance to past months or year-to-date numbers.

The Practice Advisor Report compares your practice's KPI statistics to industry-standard benchmarks. When your KPIs fall below the benchmarks, the report offers recommendations to help you improve your profitability.

If you want more personalized recommendations specific to the problems in your practice, you can also sign up for the Dentrix Profitability Coaching program. Whether you're new to Dentrix or you've been using the software for years, Dentrix Profitability Coaching can help you implement and manage KPIs for greater practice efficiency and profits. To learn more about Dentrix Profitability coaching, visit [www.Dentrix.com/Coach](http://www.Dentrix.com/Coach).

You've worked hard to establish your practice. By mastering the metrics that matter you can ensure it remains a healthy, growing practice. Make a regular checkup of your KPI "vital signs" a method for your success.

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### LEARN MORE

To learn more about the Dentrix Practice Advisor Report, see the "Practice Advisor Report" topic in the Dentrix Help or view article #47688 in the Dentrix Resource Center.

# FREE DENTRIX PRACTICE ADVISOR ASSESSMENT



LIMITED TIME OFFER: Your Dentrix data can tell you a lot about what's right and wrong about your practice. Learning how to use your Dentrix system to measure key performance indicators (KPIs) is the first step to increasing your profitability. For a limited time, Dentrix profitability coaches with Dentrix and practice management experience will provide you a free assessment of your practice—using your data—so you can improve performance using the profitability tools built into Dentrix. Sign up for your free practice assessment\* before this offer ends at [www.Dentrix.com/Assessment](http://www.Dentrix.com/Assessment).

\*Doctor must be present for the assessment.

# 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

Peak  
Low  
Average

## IMPROVE YOUR PROFITABILITY

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**SCHEDULE YOUR FREE PRACTICE ASSESSMENT NOW AT  
[DENTRIX.COM/ASSESSMENT](http://DENTRIX.COM/ASSESSMENT)**



## MANAGING YOUR CONTACTS IN **DENTRIX G6**

**GARY FRAZIER**  
Contributing Editor

Explore the new Dentrix G6 eDex module and find out how to create a digital contact directory in Dentrix.

**M**anaging and organizing contacts can be a daunting task for any business. Over time you become acquainted with many salespeople, computer technicians, tradespeople, employees, specialists, and other professional contacts. In the past, you may have relied on a Rolodex, an address book, business cards, or even sticky notes to keep track of all these contacts. Today, you may keep your contacts on your cell phone—at least the ones you communicate with most frequently. With Dentrix G6, you now have an alternative to these other organizers, and it can be easily accessed by your entire office staff.

eDex is an electronic contact manager and directory to which you can attach patient, account, and other contact notes. You can use eDex to manage and quickly search lists of patients (active, inactive, or archived), employers, insurance carriers, labs, non-patients, providers, staff, referrals, and any other contacts you may want to remember. Using eDex, you can create custom contacts and contact categories to filter the Contacts List or even locate a patient's next appointment. The eDex window consists of the eDex and Dentrix modules toolbars, the Search text box, the contacts list, and a contact details and notes area (Figure 1).

### Adding Contacts and Categories

To open eDex, from the File menu in most Dentrix modules click eDex. You can add contacts to eDex and organize them by category. By default, eDex adds all new contacts to the My Contacts category, but you can add categories as necessary to organize your contacts according to the criteria you define. You can also set filters so you can search by the categories that you have defined.

To add a contact, click the New Contact button on the eDex toolbar. From the Add New Contact dialog box, select the category that you want to add the contact to, type the contact's information in the appropriate text boxes, and then click Save (Figure 2).

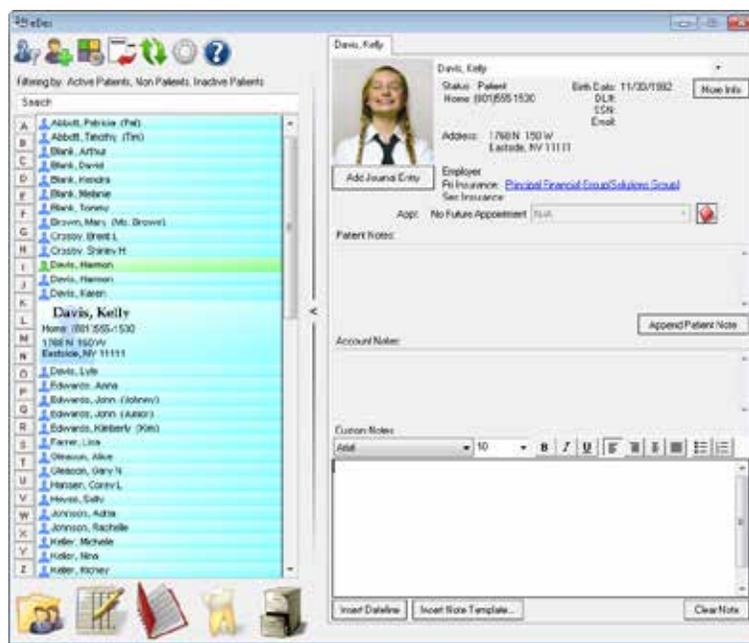


Figure 1 The eDex window.

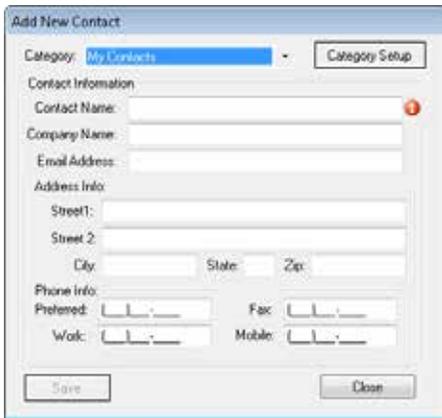


Figure 2 The Add New Contact dialog box.



Figure 4 Changing an appointment's status from the eDex window.



Figure 3 The Edit Contact Categories dialog box.

To edit a patient's contact information, click the **Family File** button in the Dentrix modules toolbar to open the Family File.

By default, eDex comes with 13 categories that you can use to organize your contacts. You can add to these categories, and you can delete any categories that you create, but you cannot delete any of the default categories.

For example, to add a category for computer technicians, click the **Edit Contact Categories** button on the eDex toolbar. From the **Edit Contact Categories** dialog box, click **Add New** (Figure 3). Type the description of the category, and then click the **Select Color** square and select a color for the category in the **Category Setup** dialog box. Click **OK**.

### Searching For Contacts and Appointments

Before conducting a search of your contacts list, you'll want to set the parameters of your search by setting filters. Click the **Set Filters** button on the eDex toolbar. From the **Set Filters** dialog box, click **Clear/Select All**, and then from the list, select the filters that you want to search by. Click **Close**. You can then search for a contact by simply typing the contact's name, phone number(s), email or home addresses in the **Search** text box of the eDex window.

From eDex, you can open the Appointment Book and locate a patient's next appointment. Or, you can change a future appointment's status directly from eDex by clicking the down arrow and selecting the appropriate status from the list (Figure 4).

### Notes

eDex provides areas for three types of notes. The first is the patient note. This is the same patient note found in the Family File, and if a patient has a patient note in the Family File, it appears in eDex. But, you can also add or append a patient note from eDex to the Family File by clicking the **Append Patient Note** button (Figure 5).

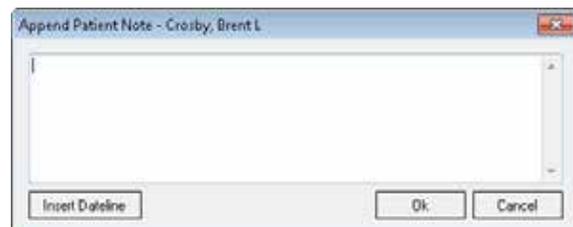


Figure 5 The Append Patient Note dialog box.

The second type of note is an account note. A note only appears in the **Account Notes** text box in eDex when the patient has an account note in the Ledger.

The last note type is a custom note which is specific to eDex. You can add a custom note to any type of contact in your contact list simply by typing in the **Custom Notes** text box. The **Custom Notes** text box includes a toolbar that you can use to format the text. You can also use a note template to ensure that your notes are consistent from contact to contact. You can even create and edit templates to fit the needs of your office.

eDex is a powerful tool from which you can save and organize your contacts or open Dentrix modules such as the Family File, the Ledger, the Appointment Book, the Patient Chart, and the Document Center. **DM**

# A Patient Charting Primer



Create more accurate clinical records with the visual tools in the Dentrrix Patient Chart.

When you are traveling down the path to a paperless office, the computer is your patient chart, and your clinical documentation is all stored electronically. You no longer have your blue and red indelible pencils to draw in the existing fillings, put Xs on the missing teeth, and mark up the tooth chart the way you want it. The goal with an electronic chart, as with a traditional paper chart, is to make it as accurate as possible so that as the doctor walks in for the exam or discusses the treatment plan, mistakes aren't made based on inaccurate information.

This article teaches some of the tips and tricks you can do with Dentrrix to make the patient chart look as accurate as possible.

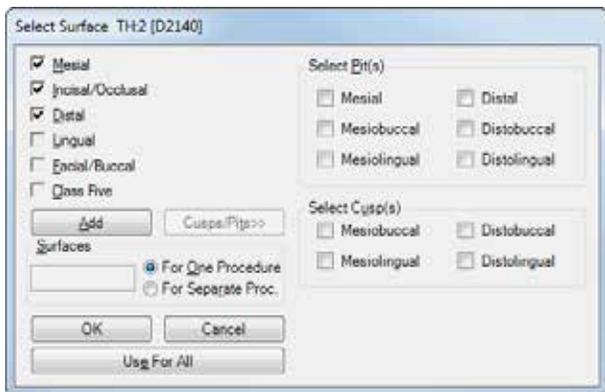


Figure 1 The Select Surface dialog box.

### A Few Charting Tips

Remember when you were treatment planning that occlusal pit composite filling or the MOD that covered the entire mesial cusp, and you could get out your colored pencils

and color away? You can do the same thing in the Dentrrix Patient Chart. As you treatment plan the procedure, from the Select Surface dialog box, just click the Cusps/Pits button to expand the dialog box (Figure 1), select the paint surfaces you want, and click OK. If the filling has already been treatment planned and you want to change the look of the filling, right-click the tooth in the Patient Chart, and then click Edit Surface Painting in the shortcut menu. In the Edit Surface Painting dialog box (Figure 2), make the needed changes, and click OK.

Remember in the paper chart you could pick up your pencil and draw in a lingual bar retainer or circle something you wanted to remember? With the Chart Notations, you can do exactly that. On the Chart module tool bar, click the Chart Notations icon (Figure 3) and then click Edit Notations. The Dentrrix Notations palette appears (Figure 4). Select the color and size of pen you want, such as a Fine Point Pen. Use your mouse to freehand draw on the tooth in the Patient Chart. If you want to erase your drawings, select the eraser tool.

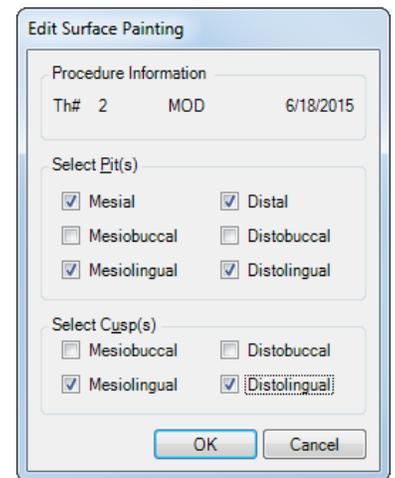


Figure 2 The Edit Surface Painting dialog box.



Figure 3 The Chart Notations icon on the Chart module toolbar.

What about the patient who had 4-bi extractions during ortho when they were a teenager? You don't want it to look like they have missing teeth. What about the patient who has a large diastema between 8 and 9? Using Conditions in the Procedure Codes palette (Figure 5), you can create a visual picture of the patient's mouth. Here are some common conditions to use:

- **15000 Mesial Drifting:** Use this for missing teeth when the space has been closed. This paint type will put arrows to show the space has been closed.

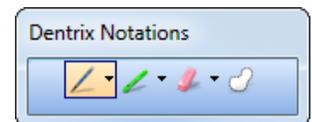


Figure 4 The Dentrrix Notations palette.

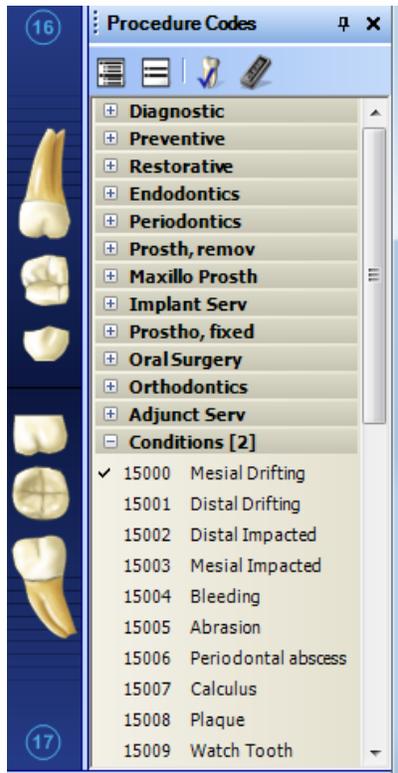


Figure 5 Conditions in the Procedure Codes palette.

- 15112/15113 Mesial/Distal Open Contact: Use this for diastemas and open space between teeth.
- 15114 Unerupted: Use this condition when the tooth is below the gum line. (Using this condition will also cause the Perio Chart to skip the tooth.)

As you explore the features and capabilities of the Dentrix Patient Chart, you'll discover how easy it is to create and maintain accurate charts as you continue down the path towards a paperless office. **DM**

#### LEARN MORE

To learn more about the Dentrix Patient Chart, see the "Patient Chart overview" topic in the Dentrix Help.

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



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# Efficiency Equals Profitability



## Increase efficiency and become more profitable with these 14 tips.

**D**o you ever feel like there aren't enough hours in the day? Are your expenses increasing, but your profit isn't? Are you disappointed in your expected return on investment of equipment purchases?

A common thread among practices with these challenges is lack of efficiency. Efficient doctors and teams complete tasks in the least amount of time possible with the least amount of resources possible by utilizing time-saving strategies. Inefficient doctors and teams take the long road.

Skip the long road! In fact, if you are not looking at ways to become more efficient in your practice, you may well be losing ground on staying profitable and successful.

Successful companies look at ways to enhance efficiencies. There's the "olive" of change that American Airlines made in the 1980s. They calculated that if you remove just one olive from every salad served to passengers, nobody would notice and the airline would save \$40,000 a year.

At the American Standard plant in Tyler, Texas, it's the doormats in the entryways. Now, they just get vacuumed instead of sent out for cleaning and that saves the company \$70,000 a year.

Xerox saved \$200,000 a year by having the employees do the watering instead of a watering service.

As a small business, efficiency is even more important because your resources are limited compared to large global companies. To keep pace in an increasingly competitive world, your practice needs to run as efficiently as possible.

Efficiency isn't just about reducing costs; you still have to achieve other business objectives, including service quality, in order to attract new patients, keep existing patients, and provide profitability. The blending of efficiency and service quality is the combination you need to maintain a healthy practice in a competitive economy.

“ To keep pace in an increasingly competitive world, your practice needs to run as efficiently as possible. ”

## “ Efficient doctors and teams complete tasks in the least amount of time possible with the least amount of resources possible. ”

Take action! Schedule a meeting with the doctor(s) and the entire team to look at ways you can enhance efficiencies while also providing great service.

Here's a jump start checklist you can use to increase the efficiency in your practice today!

1. Set the operatory up right the first time. Barring a change in the procedure, the dental assistant should not need to get up and down and break the flow of treatment.
2. Inventory is money on the shelf. Establish a monthly budget for dental supplies and stick to it! Keep it to within 5-7% of total office production (this does not include equipment purchases or single items over \$500). Avoid over-stocking.
3. Evaluate overtime expense. If this occurs on a regular basis, why is that? The goal is everyone is clocked out no later than 30 minutes after the last patient leaves.
4. Are you paying for services you no longer use? Investigate all auto charges/deducts and invoices to assure that you still are using the service.
5. Meet with your insurance advisor to make sure your current policies are adequate for today's needs. If you are leasing or paying on a loan on equipment, check that you are sending your Lender's Loss Payable Endorsements to avoid unnecessary charges.
6. Assess the need for every hygiene patient to receive a toothbrush, floss, etc. Those patients with electronic toothbrushes may not want a brush. Customize to the patient's need. They may not even miss a full goody bag and you'll be able to save an "olive."
7. Check the settings for your HVAC system. Does the heat/air need to be on during non-business hours? Schedule regular maintenance to keep your system running at its most efficient and effective level.
8. Invest in marketing that gives a Return On Investment (ROI). Track each marketing investment to make sure it is providing the desired results.
9. Make sure patients are always scheduled for their next appointment **BEFORE** they leave today's appointment. The goal is that 95% of your patients leave with a next appointment scheduled. At a minimum, everyone needs a next hygiene appointment. Even your fully edentulous patients need to be seen annually!
10. Minimize your cancellation risk through effective communication skills that help keep the patient scheduled.
11. Do not be the bank! Partner with a third-party finance company to be able to answer patients with, "Yes, you can make payments!" This provides a huge savings in employee time following up with patients on their payment plans.
12. Avoid over-staffing. Engage with an electronic patient confirmation service like the eCentral Communication Manager that can work behind the scenes confirming appointments, sending marketing messages, offering a portal for patient payments, etc.
13. Save your stomach lining and money. Have a current personnel manual that spells out all HR requirements. When a question comes up, refer to it and use it to answer employee questions.
14. Significantly increase your ROI on a piece of equipment you may already have: your intra-oral camera. Use it for every new patient exam and in hygiene. Remember, a picture is worth a thousand words and will build enormous trust with your patients.

Remember, this is not an exercise in cost-cutting. Instead, efficiency is a measure of whether the correct amount of resources have been used to deliver a process, service, or activity. An efficient process achieves its objectives with the minimum amount of time, money, people, or other resources.

Start today by enhancing the efficiencies in your office and be prepared to see greater profitability that provides for continued growth and stability in your practice. **DM**

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

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

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

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

*She can be reached at [vmoore@virginiamoore.com](mailto:vmoore@virginiamoore.com) or 530-527-9457.*

**VIRGINIA MOORE**  
Moore Practice Success



# Protect Data with a Security Risk Assessment



Are you at risk for a data breach?  
Conducting a security risk assessment  
is the first step to finding out.

The terms *data loss* and *data breach* are enough to send chills down the collective spine of any dental practice. And with good reason. The legal fees, remediation costs, restitution, fines, and negative media exposure can be hard to recover from and can have a lasting impact on your practice. In short, not only do you need to protect your bottom line, but also the privacy of your patients and your reputation.

The serious risk associated with a data loss or breach is exactly why conducting an annual Security Risk Assessment (SRA) is now a core HIPAA requirement for practices receiving many types of federal payments. A properly conducted SRA is the first step in identifying potential information security risks which you can then address by implementing solutions to improve your practice and keep it HIPAA compliant.

Generally speaking, an effective SRA provides a large scope analysis that evaluates data collection and storage, potential threats and vulnerabilities, and current security measures. It considers the “criticality,” or impact, of potential risks to the confidentiality, integrity, and availability of PHI. Through the SRA you must assess the magnitude of the potential impact resulting from a threat triggering or exploiting a specific vulnerability. You may be required to perform additional assessments, depending on the structure of your practice. You'll also be required to provide an organized report that reviews the findings of the assessment.

For example, you would need to examine and document the following areas of your practice as part of an SRA:

- Review of protected health information (PHI) inventory to determine where electronic and other data are located
- Examination of the three security safeguards: administrative, physical and technical

- Examination of the practice according to the latest Omnibus rules
- Assessment of current operations for HIPAA compliance, including safeguards in place, as well as vulnerabilities and specific threats to safeguards
- Evaluation of existing security policies and procedures

You can perform your own SRA using a tool provided by the Department of Health and Human Services<sup>1</sup>. However, many practices are choosing to hire a third party to conduct their SRA because they find the process complicated and time-consuming. Others are worried about making mistakes or not knowing the best path to remediation. Since your time is better spent doing what you do best—focusing on your patients—let TechCentral’s partner ClearDATA help you avoid the stress by conducting your SRA for you.

ClearDATA has conducted thousands of successful assessments. Known for being affordable, quick, effective and comprehensive, ClearDATA prides itself on going above and beyond the basic SRA requirements. For example, many assessment providers overlook examining the three safeguards required by 45 CFR 164.308 (a)(1)—administrative, physical and technical, including the latest Omnibus rules—which ClearDATA considers essential to the evaluation. ClearDATA’s post-assessment report is also incredibly comprehensive; it includes detailed vulnerabilities and remediation recommendations and is audit-ready. By using the Common Security Framework and complying with Health Information Trust Alliance (HITRUST) standards, you can be certain that your SRA assessment through ClearDATA will be comprehensive and top of the line.

Learn more about how an SRA through ClearDATA can protect, and even improve, your practice. For more information about security risk assessments, contact TechCentral at 877-483-0382 or visit us on the web at [www.HSTechCentral.com](http://www.HSTechCentral.com). **DM**

## LEARN MORE

Learn more about the types of security policies and procedures you can implement by reading the Dentrix eNewsletter article “4 Tips for Addressing Security Threats in Your Practice” (<http://dentrix.com/articles/content/id/1603>).

<sup>1</sup> You can download an SRA tool to help guide you through the risk assessment process at <http://www.healthit.gov/providers-professionals/security-risk-assessment-tool>. Note that the tool is provided for informational purposes only and is neither required by nor guarantees compliance with federal, state or local laws.

**THOMAS GROVER**  
TechCentral Marketing Manager





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## Protected Trust and Dentrrix: One-step, Stress-free, HIPAA-compliant Email

### ■ David Bailey | VP Protected Trust

Share X-rays and protected health information with associates and patients using HIPAA-compliant email software from Protected Trust.

Email security has been a major topic of discussion in the medical community for many years. Health care providers have seen a host of protected health information (PHI) exposed due to employee errors, unencrypted email messages, and other issues. Although news regarding major breaches has been mostly related to hospitals and insurance providers, this does not mean that dental practices are immune from similar breaches.

Today more than ever, dental practices are sharing PHI and X-rays with referring practices, labs, and patients through digital environments. In response to the growing need for secure transfer of PHI, Protected Trust developed an effective file sharing solution. In developing our solution, we made simplicity a high priority because we know how important ease of use is when considering both productivity and security.

Protected Trust is simple for the sender to use, and recipients can access the encrypted email at no additional cost and

without the hassle of registration. There is no need to completely overhaul the email accounts used in the past. Our HIPAA-compliant email solutions integrate with Dentrrix, meaning your private data remains secure within the Dentrrix practice management software without you having to worry about the overhead of managing duplicate data in a third-party product.

Let's explore some of the ways Protected Trust can help dental practices.

#### Intuitive, Compliant, Secure

Our secure email services allow you to collaborate with confidence, quickly authenticating a recipient's ID through phone or secret message. You also receive a guaranteed read receipt upon its opening (Figure 1). Protected Trust also supports attachments up to 5 GB, which are also sent via the secure connection. In short, security is certainly the main objective of Protected Trust's products and services, but it is not the only one.

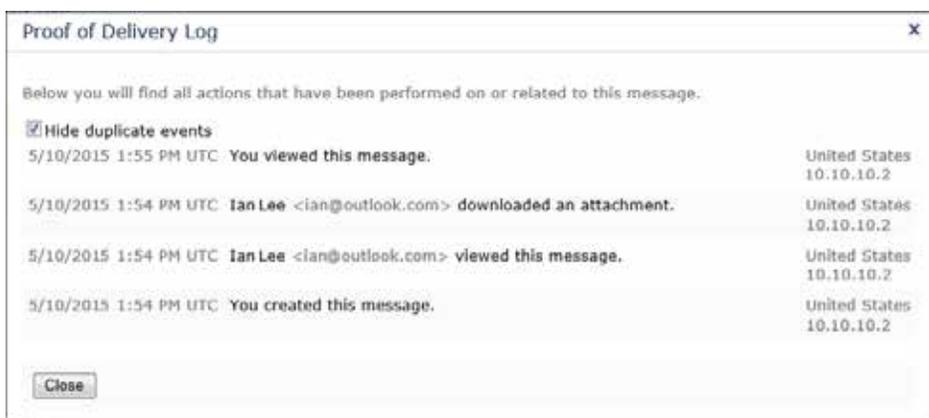


Figure 1 The Proof of Delivery Log.

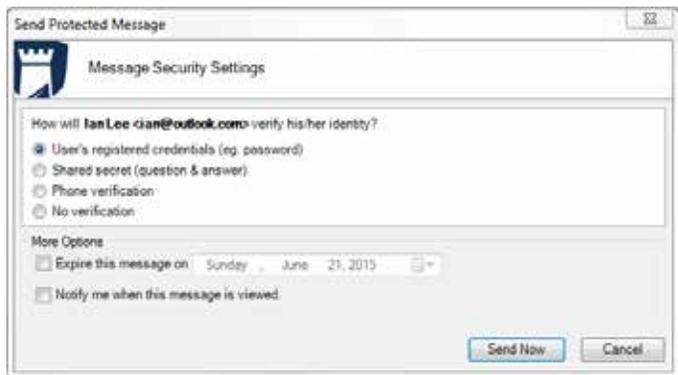
We also made sure to incorporate customizable options that allow dental practices to control policies and passwords, and update email notifications to your liking.

Here are some of the other benefits you can expect:

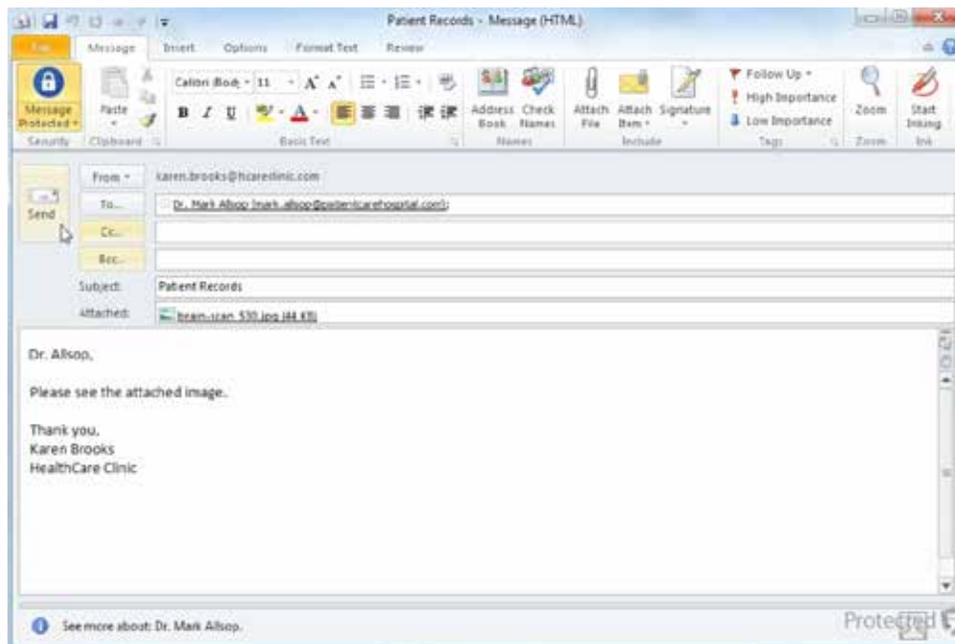
- **Intuitive** - Users enjoy a very simple experience with our tools, which offer a combination of efficiency and productivity.
- **Single sign-on** - Dental practices can use existing network access controls, such as logins and passwords, for secure email access.

- **HIPAA compliance** - Our privacy and security specialists take care of the technology so your dental practice can focus on what matters most: caring for patients. We comply with government regulations ranging from HIPAA and HITECH to SOC 2 and beyond, while signing business associates agreements to really offer peace of mind.
- **Mobile** - You can send your Protected Trust secured emails using popular smartphones and tablets, as well as access your inbox and send folders directly through the native mail app.

These features and capabilities address several important obstacles in modern dental practice management such as usability and protection. Perhaps most importantly, since dental practices can be fined hundreds of thousands of dollars



**Figure 2** The Send Protected Message dialog box.



**Figure 3** Sending secure email from within Dentrix using Protected Trust is easy.

for not complying with HIPAA, and the cost of breach can be even higher, we make sure your records are safe throughout their life cycles.

One successful partnership with Agnini Family Dental showed just how much of an improvement can be enjoyed by deploying Protected Trust solutions in their practice environment. Following the implementation, Agnini enjoyed the ease of use associated with our software that provides instant compliance and the ability for employees to send secure email directly from Dentrix. Melissa Sheffield, Clinical Manager at Agnini Family Dentistry stated, "The best thing about Protected Trust is that we feel secure in all of our electronic communications and confident that we don't have to worry about compliances."

### Protected Trust Integrates with Dentrix

Our product is a certified Dentrix G5 Connected solution, ready to integrate directly into your Dentrix system after purchase. Once you choose to email patient data and X-rays to a colleague from within Dentrix, Protected Trust takes it from there. Patient data is completely and automatically encrypted through a secure data tunnel during delivery, and requires the receiving party to verify their identity prior to opening, releasing, and sharing using security settings that you configure (Figure 2).

The sender and recipient don't need to do anything extra other than click the Send Message email button on the Dentrix toolbar to begin an email message to the selected patient (Figure 3). The integration with Dentrix assures that the entire procedure is secure and can be executed easily without any additional steps or requirements. Simply put, dental practices that use Dentrix will enjoy an extremely quick and easy deployment, as well as

continued efficiency and security gains throughout their experiences with Protected Trust.

At the end of the day, centralization is an important matter for dental practices in this new era of technology-based management. Our Protected Trust solution, which you can access and use easily within Dentrix, can boost your efficiency, productivity, and security all in one fell swoop. What's more, we're available through Henry Schein's Dentrix marketplace, which makes it easy for you to find and purchase. You can also sign up for a free, no-nonsense trial of our encryption and HIPAA-compliant email services for 15 days! Just give us a call at 863-594-1141 or visit our website [www.protectedtrust.com](http://www.protectedtrust.com). **DM**

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# SOLUTION GUIDE

You already depend on Dentrix to make your practice more profitable and productive. Now, you can turn Dentrix G5 into an even more powerful solution by adding trusted, fully integrated third-party applications and capabilities to your digital dental office. The Dentrix Connected logo means the product has been carefully developed, tested and certified to work with your Dentrix G5 platform. To see the full list of Dentrix G5 Connected applications visit [www.Dentrix.com/Integrated-products](http://www.Dentrix.com/Integrated-products) today.

**Apteryx**  
[www.apteryx.com](http://www.apteryx.com)



**Dental Practice Solution**  
Apteryx exceeds the expectations of its customers by creating timely, innovative and cost effective software solutions that improve the profitability of the clients' businesses.



**Broadview**  
[www.broadviewnet.com](http://www.broadviewnet.com)



**Network-based Business Communication**  
Make your practice more profitable with OfficeSuite Dental, the state-of-the-art phone system that fully integrates with Dentrix G5.



**BiteBank Media**  
[www.bitebankmedia.com](http://www.bitebankmedia.com)



**Dental Practice Solutions**  
Streamline your practice with custom dental websites, appointment notification and scheduling, real-time booking, patient education videos and reputation management.



**Citi**  
[www.healthcard.citicards.com](http://www.healthcard.citicards.com)



**Citi Health Card**  
One click. One Solution. Patient financing just got a lot easier. The Citi Health Card program is now integrated within Dentrix G5. Spend more time on patient care and less money on your patient financing program costs.



**Demandforce**  
[www.demandforce.com](http://www.demandforce.com)



**Patient Communication Solution**  
Demandforce works seamlessly with Dentrix G5 software to automate online and offline communications with existing patients to improve in-office efficiencies.



**Dental Symphony**  
[www.dentalsymphony.com](http://www.dentalsymphony.com)



**Dental Practice Solution**  
Dental Symphony's web-based clinical software revolutionizes patient management. Working alongside Dentrix, Dental Symphony provides innovative tools to practice easier, safer and more efficiently.



DentalWriter  
www.dentalwriter.com



**Medical Billing Software**

For over 25 years, Nierman Practice Management has led medical billing in dentistry by continuously developing innovative products and providing exceptional training for dentists looking to grow their practice.



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www.dexis.com



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**Intra-Office Communication**

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Great Minds  
www.greatminds.com



**Dental Practice Solution**

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Lighthouse  
www.lh360.com



**Patient Communication Solution**

Lighthouse 360 is a comprehensive automated patient communications system designed exclusively for dentists. It uses email, two-way text messaging, automated phone calls, postcards and letters to reach your patients.



Panda Perio  
www.pandaperio.com



**Periodontal Practice Solution**

The complete clinical digital record for Periodontal practices. Charting, comparison reporting, treatment planning, automated chart notes, and much more. Save hours of admin time and unify your front and back office.



Patient Activator  
www.patientactivator.com



**Patient Communication Solution**

Patient Activator, part of Los Angeles-based 1-800-DENTIST®, is the leading social media optimization and patient communications service dedicated to the dental profession.



Practice Mojo  
www.practicemojo.com



**Patient Communication Solution**

PracticeMojo creates proven campaigns that help dental practices recruit, retain and reactivate patients automatically, using email, text messages, automated phone calls and mailed postcards.



Practice Safeguard  
www.practicesafeguard.com



**Web-Based Fraud Monitoring**

A web-based financial monitoring tool for Dentrix G5 users that deters fraud and costly errors by alerting any device you carry to unusual transactions in real time.



RecordLinc  
www.recordlinc.com



**Patient Communication Solution**

RecordLinc is the largest professional network of dental professionals in the world. Securely and easily send electronic referrals, patient transfers, and track treatment plans between dental practices in a HIPAA-compliant portal.



Reputation  
www.reputation.com



**Patient Communication Solution**

Reputation.com's platform enables dentists to see all their online reviews in one space and use the platform's analytical tools to understand the broad themes that emerge from patient feedback.



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**

TeleVox Software is a high-tech engagement communications company, providing automated voice, email, text and web solutions that activate positive patient behaviors through the delivery of a human touch.



Text2Floss  
www.text2floss.com



**Patient Education**

An interactive educational tool meant to help patients develop positive oral hygiene habits by delivering oral health information through the use of text messaging and mobile technology.



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**

Teamlinks EHR was created to foster interdisciplinary collaboration on patient health information with the goal of connecting the health care team and the patient.



Yapi  
www.yapicentral.com



**Dental Practice Solution**

Started as the first fully integrated intra-office communication software, YAPI has grown into a comprehensive suite of innovative automation solutions designed around unique needs of dental practices.



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