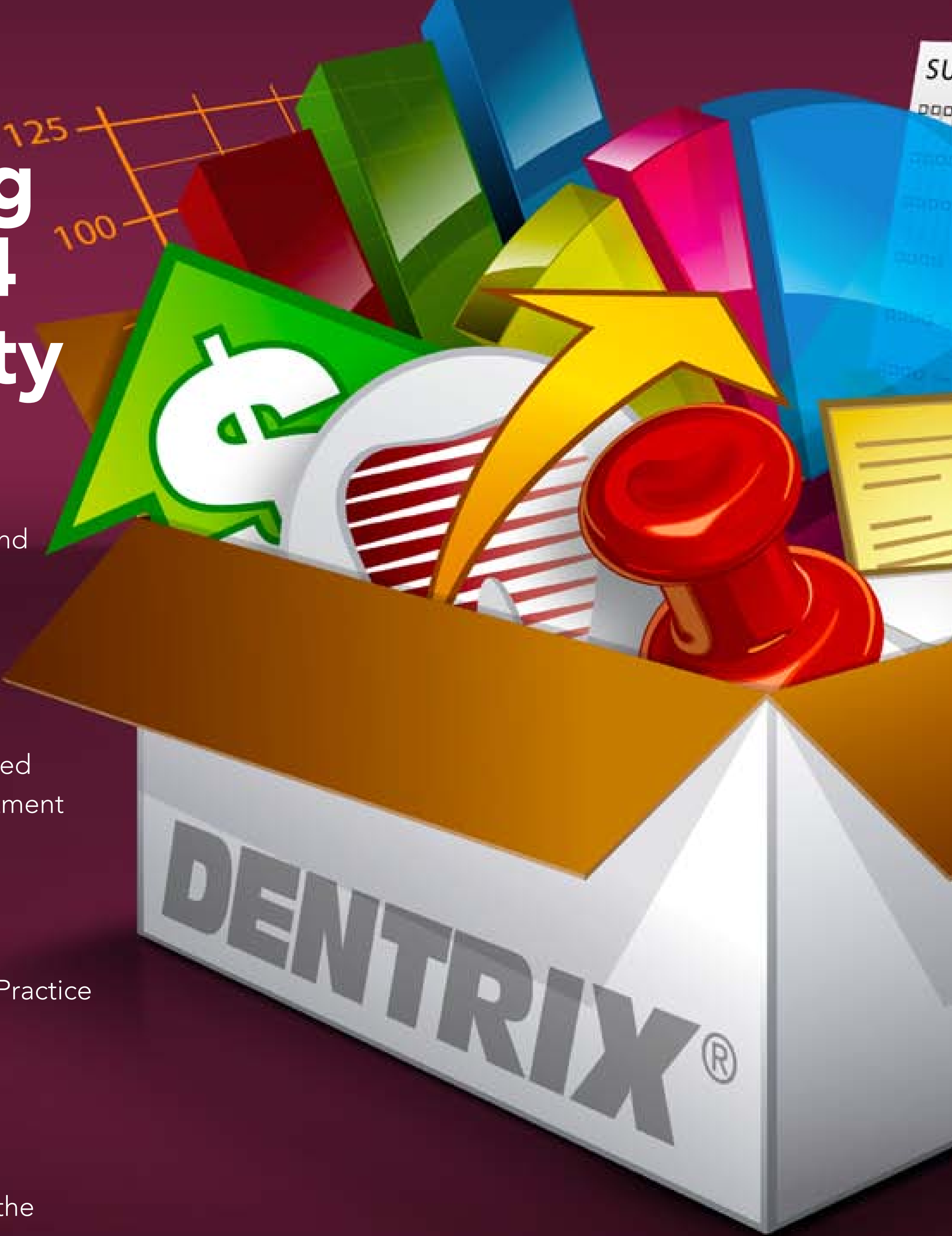
dentrix
MAGAZINE



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Dentrix Magazine Volume 22 Issue 3 — Fall/Winter 2010

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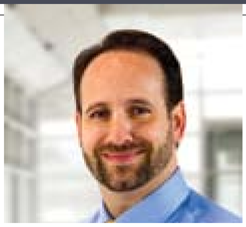

Year-End Considerations

FROM THE EDITOR

The end of every year always brings a rush of activity. Families pack the schedule with school programs, holiday parties, and shopping trips to find that perfect gift. Dental offices are also busier than ever serving the many patients rushing to schedule treatment before their insurance benefits expire at the end of the year.

When the schedule is packed with last-minute, year-end patient appointments, finding time for other practice management tasks can be a challenge. It's easy to overlook less urgent, but equally important, responsibilities like closing the fiscal year and updating your office technology. That's why this issue of Dentrix Magazine features helpful articles on several timely topics, including guidance for closing the year in Dentrix and information about Dentrix G4 Productivity Pack 8.

Closing the year is an important task that all Dentrix practices should complete annually. Closing the year properly helps you maintain accurate financial records, and it also provides an opportunity to generate helpful year-end reports which you can use to review progress and plan for the future. The article on page 35 provides answers to common questions about how to close the year, what to do with outstanding insurance claims, and which year-end reports to run.

Dentrix G4 Productivity Pack 8, which is now available for download in Dentrix, offers new tools to make your practice more focused, efficient, and productive. In the article on page 11, we introduce many of these tools and explain how they will help you align daily activities with long-term practice goals, get new and temporary staff up to speed quickly, and simplify a host of patient, prescription, scheduling, and lab management tasks.

We hope you enjoy reading Dentrix Magazine. We'd like to hear from you. You can email us at dentrixmagazine@henryschein.com. If you have product questions, please type "Q&A" in the subject line. If you want to offer feedback on an article or a suggestion for improving the magazine, please type "Letter to the Editor" in the subject line.

Regards,

Matt Singerman
Editor-in-Chief

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Q: Is there a way to view numerous days of clinical notes all at once?

— Dr. Gary Martine, Martine Dentistry at Stonegate
Zionsville, IN

A: The best way to do this currently is to display only the clinical notes on the **Progress Notes** tab. With a patient selected in Patient Chart, click the **Progress Notes** tab, and then click each of the following icons on the Progress Notes toolbar so the corresponding notes do not appear:

- Treatment Plan
- Completed Work
- Existing Work
- Conditions
- Exams
- Referrals

Make sure the Clinical Notes and the Expand Notes icons are both selected so the note text for the clinical notes appears. If some notes are long and you can't see all of the text in the list, you can move your mouse over the note text, and the note expands to display the full clinical note.

Tip: You may want to click the Progress Notes Layout button on the Chart Layout toolbar to allocate more space in the Chart window to view the progress notes.

Note: These settings only affect the computer where you change these settings; they will not affect other computers running Dentrix in your office.

If you want to view all of the clinical note text for a patient in a single document, from the **Options** menu, click **Copy Progress Notes to Clipboard**. You can then paste the progress notes from the Windows Clipboard (by pressing CTRL+V) into another program (such as Microsoft Word or Notepad), where you can view, search, and print the notes in a single document.

Some Dentrix customers have also requested a simpler way to do this. If you'd like to vote for a clinical notes enhancement in Dentrix, go to MyVoice for Dentrix (myvoice.dentrix.com), type "view clinical notes without opening pt chart" and click **Search**. You can use the **vote** button to vote for this feature enhancement.

Q: In the Treatment Planner, what is the purpose of "linked" treatment cases?

A: When alternate treatment plan cases are offered to a patient, the alternate cases can be linked together in Treatment Planner. For example, if a patient can choose an implant or a bridge (but not both), the two alternate treatment plans can be put in different treatment case folders in the Treatment Planner and then linked together using the **Link Alternate Cases** menu option. One of the benefits of linking cases is that once you set the status of one case to Accepted or Completed, the others are automatically assigned a Rejected status.

To link the cases, right-click one of the cases, then from the shortcut menu, click **Link Alternate Cases**. Under **Linked Cases**, select the cases that should be linked, and click **OK**. Since we know that only one of these cases will actually be accepted and scheduled, the two cases can be linked so that only the recommended case remains visible in the Patient Chart, and the other cases are hidden from view (although they are still visible in the Treatment Planner).

To change which case is recommended, right-click the case and select the appropriate option. When a linked case is accepted, it will automatically change the other linked cases (which are unnecessary) to a status of Rejected.

Q: How can I update the scheduled fee amounts for multiple appointments without having to edit each individual appointment?

A: The ability to update schedule fees for multiple appointments was added in Dentrix G4 Productivity Pack 7. In the Appointment Book, from the **Options** menu, click **Update Scheduled Amounts**. In the **Update Scheduled Amounts on Appointments** dialog box, enter a date in the **Appointments Starting** box. All appointments in the Appointment Book that are scheduled for a date after this starting date will have their fees updated when you click **Update**. If you want to apply the fee update to appointments for specific providers only, select those providers under **Appointment Provider(s)**. To select multiple providers, hold the CTRL key while clicking the providers. Once you have selected the settings you want, click **Update**. If a large number of appointments need to be updated, it may take a few minutes to update the scheduled fee amounts.

Q: How do I find my API Token for PowerPay LE?

A: If your Moneris eSelect Plus account has been activated with Moneris Merchant Solutions, you can easily obtain the API Token by going to https://esplus.moneris.com/usmpg and then logging on with your user ID, Store ID, and password for the website. After logging in, click the **Admin** tab at the top, and then click **Store Settings**. You can find the API Token for PowerPay LE at the top of this page. Write this API Token down because you will need to enter it into the PowerPay LE Setup window in eSync. (For more information, you can view knowledgebase article 46802 in the Dentrix Resource Center.)

Q: When sending a claim, I receive a "patient not on file" rejection. What does this mean?

A: Before processing a claim, some insurance companies run a check on the claim to verify that the patient is covered for the procedures submitted. A computer checks the information you submitted against the insurance company's database. The information that is verified includes the patient's and subscriber's first and last names, the patient's address, the patient's gender and date of birth, the patient's relationship to the subscriber, the subscriber ID, and the group ID. Because this verification is done by a computer, everything that it checks has to match what the insurance company has on file. If it does not match, the insurance company will reject the claim because it can't find the patient's information in its database. For example if you send a claim for patient "John Doe," but the insurance company has the patient's name spelled "Jon Doe," the claim will be rejected. If your records show the patient address as "4th ST," but the insurance company has the address as "4th Street" or "Fourth Street," the claim will be rejected.

Q: How often should I back up my database and what type of media can I use?

A: You should back up your database daily. You can choose to back up your database at any time, but you should first verify that Dentrix is closed on all computers before starting a backup process. Most computer professionals will set automatic backup systems to run a couple hours after the office's normal business hours.

You can perform backups using any reliable media, such as tapes, CDs/DVDs, and external hard drives. You should also consider changing your old media with newer media over time as media in general may fail over the course of time. Each type of media may have pros or cons related to it. Be sure to research and understand them before choosing a media type. We recommend using eCentral's eBackup. Dentrix users on a current customer service plan can store up to 1 GB of storage space free. For more information, see www.dentrix.com/products/eservices/ebackup.

Do you want to submit a technical support question to Dentrix Magazine? Send your question to dentrixmagazine@henryschein.com. Please type "Q&A" in the subject line.

HOW TO LEARN MORE

If you want to learn more about the Dentrix tips featured in Dentrix Magazine, check out these self-paced learning resources.

Dentrix Help Files

In the Dentrix Help files, you can explore a comprehensive list of conveniently indexed topics or search the topics for key words. To search the Help files, from the **Help** menu in any Dentrix Module, click **Contents**, click the **Search** tab, type a search phrase or topic name, click **List Topics**, and then under **Select topic**, double-click the topic name. Tip: To turn off the search highlights, press F5.

Dentrix eNewsletter

Sign up for the free Dentrix eNewsletter and receive tips for using Dentrix, practice management advice from industry consultants, and news about product releases and training events. Sign up today at www.dentrix.com/newsletter. To read previous articles, visit www.dentrix.com/newsletter-archive.

Dentrix Resource Center

The Dentrix Resource Center offers an online library of on-demand software tutorials and product manuals, a technical support knowledgebase, and opportunities to register for webinars with Dentrix experts. Access is free for dental practices on a Dentrix Customer Service Plan. Log in today at www.dentrix.com/resource-center.

MyVoice for Dentrix

Do you have an idea for a new feature in Dentrix? Do you want to share it with the Dentrix product managers and other Dentrix users? Visit MyVoice for Dentrix where you can share your great ideas and "vote up" the best ideas shared by others. Log in today at http://myvoice.dentrix.com.

▼ eCentral Kiosk for iPad

Saying goodbye to the clipboard just became more chic. The eCentral kiosk software released earlier this year for Dentrix users is now integrated with the Apple iPad.

Patients checking into a Dentrix practice can be handed an iPad for completing patient forms instead of a clipboard. "Not only is it more convenient for patients to complete new forms or update existing forms on an iPad, it's more enjoyable," said Adam McDaniel, eServices Product Manager for Henry Schein Practice Solutions. "No one likes to complete forms, but when patients can see how the process is improved and that it's benefiting them, it improves their opinions of the practice."

Forms completed on an iPad, like those submitted using other hardware options, can be imported into Dentrix in seconds without manual entry. The office staff is able to maintain control of the information in the patient files by reviewing the data before accepting it into Dentrix.

In addition to eliminating manual entry, the kiosk software improves the accuracy of patient files and expedites the appointment process. "While the benefits for the patient are important, it was with the front office in mind that the kiosk software was developed," said Mr. McDaniel. "Entering patient data quickly is necessary for a timely appointment process. The kiosk software speeds up the process and improves accuracy by reducing the risk that staff members will misinterpret patient handwriting or mistyped patient information."

The patient kiosk software is sold as part of eCentral Website Manager, which also allows patients to complete forms online. Visit www.dentrix.com/kiosk or call 800-734-5561 for more information about modernizing your patient form completion process.

▼ Dentrix G4 Productivity Pack 8

Henry Schein Practice Solutions has released Dentrix G4 Productivity Pack 8, which will bring a variety of welcome features to dental practices. Foremost among them is the new Daily Huddle Report. With it, dentists and their teams will be able to make daily action plans to impact key performance indicators and monitor their progress toward achieving monthly goals. They can also customize what information is flagged on patients coming in for appointments at the beginning of each day.

For instance, practices will be able to make action plans and measure performance against monthly goals for production, collections, scheduling, and attracting new patients. And they can keep tabs on daily metrics such as percentage of production collected for the day. The daily production schedule also includes a variety of flags that can be used to prepare for patient visits. These include flags for lab work, treatment plans, appointment information, insurance eligibility, patients with other family members who have unscheduled treatment plans or continuing care, and much more.

With just a little up-front planning, the dentist can customize reports to be run and reviewed at the beginning of each day. In this way dentists can spend their limited practice management time reviewing progress and giving the team guidance rather

Dentrix G4 Productivity Pack 8, continued

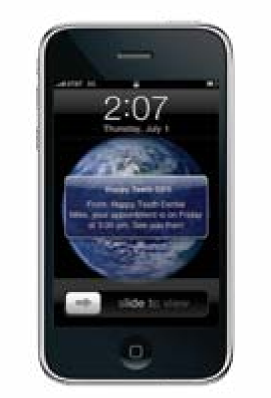
than chasing down scheduling information and performance metrics scattered in a variety of different tools.

Productivity Pack 8 also includes a great time saver for offices who regularly perform letter merges. The new Dentrix Toolbar for Microsoft Word 2007 and 2010 lets users view and insert Dentrix data fields from inside Microsoft Word while creating a letter merge form. Because users won't have to shuttle between two programs, letter merges will be much more intuitive and easy to use, especially for beginners or staff who infrequently set up letter merges.

The Dentrix Launcher is another great boon to new or temporary office staff who have little familiarity with Dentrix. Presenting users with a graphical representation of a dental office, including front office and operatory spaces, this interface helps new users quickly learn how to access the variety of modules found in Dentrix. Armed with this understanding, they quickly learn to navigate the system and find what they need to complete routine tasks. For instance, the wall of paper charts in the virtual office is an intuitive representation that helps users know where to find the electronic chart, while the box marked "LAB" on the desk helps them find what lab work has been ordered and recorded in the system.

These and many other improvements found in Dentrix G4 Productivity Pack 8 are sure to be useful to dentists and their staff. If you are on a customer service plan, download the new release. If you aren't on a customer service plan, now is a good time to renew!

▼ Unlimited eCentral Text Message Reminders



The most integrated patient reminder program for Dentrix users is now even better. The eCentral Communication Manager now includes unlimited text message appointment reminders.

Text message reminders are just one part of a comprehensive communication process designed to reduce no-shows and improve the timeliness of patient arrival. eCentral allows practices to automate the reminder process with postcards, email and text messages that are delivered using the information in the Dentrix Appointment Book.

Sending postcards through eCentral is a more cost-effective method of sending traditional postcards. Practices can change designs and messaging without the worry or expense of an inventory. Postcard reminders are typically mailed three to four weeks before the appointment, based on the practice's preferences.

The email reminders are typically sent a week or two before the appointment and give patients the ability to confirm appointments with the click of a button. Confirmations are automatically updated in the Appointment Book. This unique process allows the front office to see which patients have confirmed and which still need to be contacted.

Finally, text message reminders can be sent the day of an appointment to ensure the patient will not forget the appointment. "Text messaging has become a popular and effective means of communication, with studies showing that 96 percent of text messages are read," said Adam McDaniel, eServices Product Manager for Henry Schein Practice Solutions. "The unlimited text messages in eCentral allow practices to take advantage of this trend without the worry of a large bill at the end of the month."

Call 800-734-5561 to register for eCentral or upgrade to the unlimited text messages plan. Visit www.dentrix.com/eCentral for more information about eCentral.

▼ New eClaims Payers

Henry Schein Practice Solutions is proud to announce that MBA Benefits Administrators Inc. of Salt Lake City, Utah (Payer ID 83028) is accepting electronic claims effective 8/20/2010. In addition, the following payers now accept electronic attachments:

Payer	Payer ID	Effective Date
AARP (Administered by Delta Dental of Washington, D.C.)	52147	6/10/2010
Anthem BCBS of Virginia	CB923	8/20/2010
Delta Dental of Alabama	DDAL1	6/10/2010
Delta Dental of Florida	DDFL1	6/10/2010
Delta Dental of Louisiana	DDLA1	6/10/2010
Delta Dental of Mississippi	DDMS1	6/10/2010
Delta Dental of Montana	DDMT1	6/10/2010
Delta Dental of New York	11198	6/10/2010
Delta Dental of West Virginia	31096	6/10/2010
Delta Dental of Delaware	51022	6/10/2010
Delta Dental of DC	52147	6/10/2010
Delta Dental of Pennsylvania	23166	6/10/2010
Delta Dental of Georgia	DDGA1	6/10/2010
Delta Dental of Nevada	DDNV1	6/10/2010
Delta Dental of Texas	DDTX1	6/10/2010
Delta Dental of Utah	DDUT1	6/10/2010
Delta Dental of Maryland (Pennsylvania)	23166	6/10/2010
Regence BCBS of Oregon	CB850	8/20/2010
Regence BCBS of Utah	CBUT1	8/20/2010

You can search the complete list of electronic payers at www.dentrix.com/products/eservices/eclaims/payer-search.aspx, or you can call 1-800-734-5561, option 4 for assistance.

For assistance sending claims or attachments electronically, please contact eServices Support at 1-800-734-5561, option 1.

Introducing Dentrix G4 Productivity Pack 8

by Jay Wood

Dentrix G4 Productivity Pack 8 is a milestone release that makes existing Dentrix features easier to use and introduces exciting new features. Productivity Pack 8 provides innovative improvements that make dental practices even more focused, efficient, and productive.

This starts with a unique Daily Huddle feature that keeps daily tasks in perfect alignment with practice targets and goals. An optional Dentrix Launcher reduces training costs by placing Dentrix modules and capabilities in the context of an intuitive graphical office environment. A new toolbar for Microsoft Word allows users to view and insert Dentrix fields directly into Word documents. And many other improvements work to streamline prescriptions, keep patient information current, manage scheduling disruptions, and streamline lab work. Together, these features boost staff productivity, improve patient satisfaction, and ultimately increase profitability.

DAILY HUDDLE

Engaging the dental office staff and clinicians in daily huddles is a practice that has long been advocated by leading dental consultants. Doing so gives team members a way to prepare for the day and measure their performance against goals.

One of the barriers to having effective team meetings is the time it takes to collect the information that needs to be shared and discussed. The Daily Huddle report provides a way for teams to easily and quickly assemble all of the information the team needs to effectively prepare for the day.

The report lists all scheduled patients for the day and other important information. Users can customize the report to flag up to 25 different pieces of information about patients and appointments. Staff members can use the flags to see important information like who hasn't confirmed their appointments, who has missed their appointments and which appointments have lab work or notes associated with them. Staff members can also see medical alerts and patient alerts, birthdays and other patient notes, whether patients have been referred to other offices for treatment, whether consent forms or questionnaires are out of date, and whether the patient is currently covered by an insurance plan or has an account balance.

The Daily Huddle report lets clinicians and staff members measure their performance against monthly goals for production, scheduling and new patient acquisition, as well as collections as a percent of production and case acceptance.

Offices can customize the Daily Huddle report once and run it daily, which helps them measure performance and quickly plan corrective action rather than spending their time trying to collect the data they need. Armed with up-to-date information, they are more prepared to deliver the best patient care during the day for each individual patient and stay focused on achieving the practice's monthly goals.

DENTRIX PLUG-IN FOR MICROSOFT WORD

Productivity Pack 8 includes a great new feature for any office that manages its own patient mailings. The new Dentrix plug-in for Microsoft Word 2007 and 2010 lets offices create and edit patient letter templates by inserting Dentrix merge fields from inside Word (Figure 1). During the install, Productivity Pack 8 detects whether Word is installed and, if so, what version it is. If it finds Word 2007 or 2010, it automatically installs the plug-in.

When staff members want to create a new letter template for letter merges, they simply open Word and create the letter template. The Dentrix Letter Merge Fields icon will appear on the Mailings ribbon in the Word interface. Clicking it will bring up a task pane that displays the Dentrix fields that are available to merge into the letter template. Users are then free to browse the fields and select which ones they want to include in the template. With a

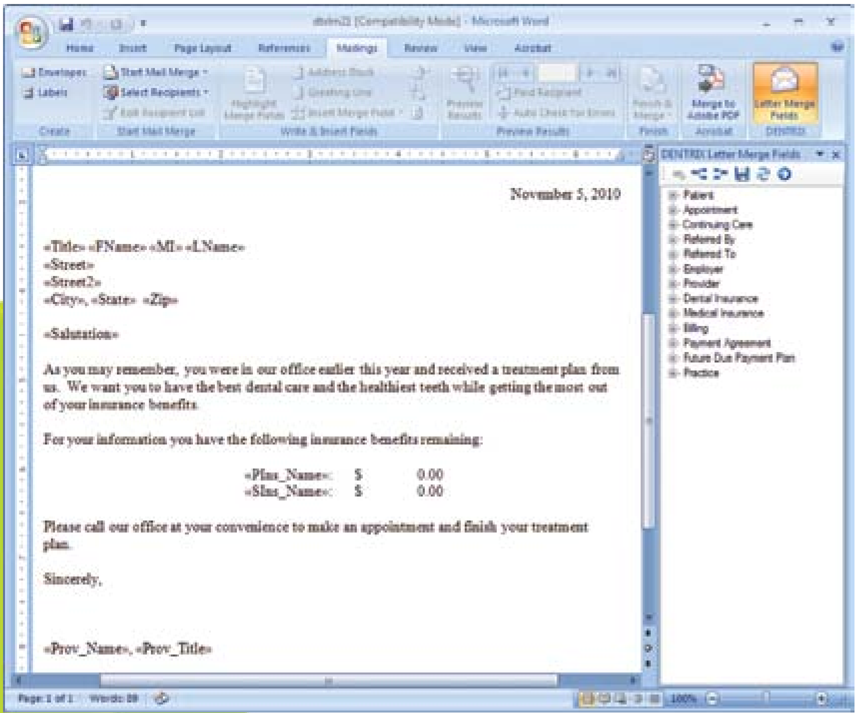


Figure 1 The new Dentrix plug-in for Microsoft Word 2007 and 2010 lets offices create and edit patient letter templates by inserting Dentrix merge fields from inside Word.

simple interface for creating letter templates for merges, even the staff member with the least computer experience will be able to create letter merge templates with confidence.

QUESTIONNAIRE ENHANCEMENTS

Enhancements to the Questionnaires module now let staff members mark any field as required. When a field is marked required, patients have to enter information in the required fields before they are able to submit the form electronically.

Questionnaires can also be set to expire after a certain length of time, which helps staff members keep patient and guarantor data up-to-date. These new features are indispensable to clinicians and staff who want to deliver top-quality patient care and keep the practice running smoothly, ensure that patients don't skip over important information when they fill out health histories, and help keep important information up to date.

DENTRIX LAUNCHER

The new Dentrix Launcher provides a graphical view of Dentrix that helps office staff quickly locate and access the different parts of the program (Figure 2). This feature is especially useful for new or temporary staff members who may not be familiar with Dentrix.

The Launcher is a graphical representation of a typical dental front office and operatory that allows staff members to work from an intuitive interface. As they move over the interface with their mouse, areas of the screen will light up, indicating that a module can be accessed by clicking on that area. The visual metaphors, like a wall of patient charts, give the user cues about what they should expect to find if they click on the highlighted area. Rather than having to rely on help from more experienced staff, they can easily explore the new Launcher and find the Dentrix modules they need, which helps them get up to speed and be productive with less time and effort.

PINBOARD ENHANCEMENTS

The new Pinboard features will be most welcome for anyone who has been caught halfway through a family re-schedule only to have the patient change his or her mind. With three, four, five or more appointments on the Pinboard, can you remember where they were originally and put them back in their correct places? In a busy office with lots of interruptions that may be impossible. With Productivity Pack 8, staff members can now right-click any appointment on the Pinboard and select Restore All Pinboard Appointments to restore all previously scheduled appointments to their originally scheduled times.

PRESCRIPTIONS ENHANCEMENTS

Refilling prescriptions should be as simple as finding the original prescription and duplicating it—and now it is. With Productivity Pack 8, dentists can select any prescription and click the new Refill button in the Patient Prescription dialog box. Dentists can also specify how many times the patient can refill the prescription at the pharmacy. If for some reason dentists need to correct a prescription date, Dentrix now allows that too.

DDX INTEGRATION

For the dentist who orders and tracks lab work electronically, Productivity Pack 8 now provides access to the Digital Dental Exchange (DDX) from the Appointment Book, Chart and Treatment Planner. With more ways to connect to DDX, clinicians can enter lab prescriptions and check their status with minimal disruption to patient interactions and work flow.

Dentrix G4 Productivity Pack 8 helps practices become more focused, profitable, and productive—with new features that align daily tasks with practice goals, make the Dentrix system even easier to use, and simplify a long list of important patient, prescription, scheduling, and lab management tasks.

Learn More

To learn more about the new features in Dentrix G4 Productivity Pack 8, visit the Dentrix Resource Center and view the Productivity Pack 8 Release Preview or download the Productivity Pack 8 Release Guide. See “How to Learn More” on page 7 for instructions on accessing these resources.

Figure 2 The new Dentrix Launcher provides a graphical view of Dentrix that helps office staff quickly locate and access the different parts of the program.

COMING SOON: DENTRIX DENTALINK

Coming right on the heels of Dentrix G4 Productivity Pack 8, the soon-to-be-released Dentrix Dentalink office communicator will allow office staff to send each other instant messages within the dental practice. With a single mouse click, staff members can send routine communications like “Doctor Shwartz, your next patient is here” or “Please send Jenny to operatory A.” Like the new Daily Huddle report introduced in Productivity Pack 8, Dentalink will help dental office teams work together more effectively to achieve practice goals. As the most requested feature on MyVoice for Dentrix (http://myvoice.dentrix.com), Dentalink is sure to be a welcome addition in any dental practice.


EXPERIENCE THE ADVANTAGES OF PROFITABILITY COACHING
Get more out of your Dentrix investment with the Dentrix Profitability Coaching Program. This unique program is designed to turn your Dentrix practice management solution into a more effective profit-boosting tool.
Let our experts show you how to put all the features of Dentrix to work for your practice, and help you identify the reports and performance metrics you should focus on for greater profitability. You'll learn ways to:
• Keep patients coming back
• Complete treatment plans faster
• Increase treatment acceptance rates
• Get timely insurance payments
• Give more accurate patient estimates
• Keep your schedules filled
"The Profitability Coaching Program has been extremely helpful to our practice. We spend most of our time taking care of our patients, so we don't really have time to tinker and learn everything the software can do for us."
~LeighAnn, Dr. Jason Lowry, Kingman, AZ
This exclusive one-year coaching program is offered to our customers for the low price of only $675! To take advantage of this special offer call us at 1-800-DENTRIX or visit www.Dentrix.com/ProfitabilityCoaching today!
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Improve production with the Practice Advisor Report. Learn where the numbers come from and what they mean.

To ensure your practice is as profitable as possible, it's important to track key performance indicators, or KPIs. The Dentrix Practice Advisor shows your practice's KPIs in several categories, including production. To access the Practice Advisor, in the Office Manager, click **Analysis**, then **Practice Advisor**. Or, click the **Practice Advisor button**.

Practice Advisor Report

Report Date: 09/16/2010

Active Patient Base by Last Visit: 386

PRODUCTION as of 05/16/2010

Practice Totals	Apr 10		MTD May 10		Benchmark	Variance
Production	77,768.00	100%	45,629.00	100%	20,000 - 40,000	15,629.00
Adjustments to Production	2,142.58		3,070.69			
Adjusted Production	79,910.58		48,699.69			
# of Provider Production Days	70.50		66.00			
Average Daily Production	1,103.09		691.35		1,250 - 2,500	-1,183.65
Average Hourly Production	136.67		85.77		175 - 355	-179.23

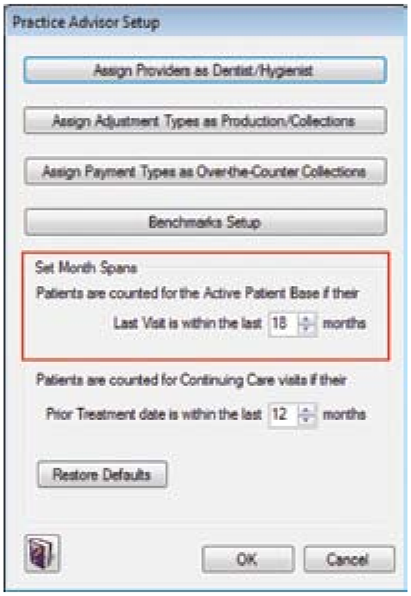
Dentist Totals	Apr 10		MTD May 10		Benchmark	Variance
Dentist Production	67,377.00	87%	41,446.00	91%	65% - 75%	21%
# of Dentist Production Days	70.50		66.00			
Dentist Average Daily Production	955.70		627.97		1,060 - 2,125	-964.53
Dentist Average Hourly Production	118.41		77.91			
Dentist Unfilled Hours	471.00		437.17			

Hygienist Totals	Apr 10		MTD May 10		Benchmark	Variance
Hygienist Production	10,391.00	13%	4,183.00	9%	25% - 35%	-21%
# of Hygienist Production Days	9.00		8.50			
Hygienist Average Daily Production	1,154.56		492.12		800 - 1,200	-507.88
Hygienist Average Hourly Production	144.32		61.51			
Hygienist Unfilled Hours	0.00		0.00			

Case Acceptance Totals	Apr 10		MTD May 10		Benchmark	Variance
Amount of Treatment Diagnosed	75,087.00		18,360.00			
Amount of Treatment Accepted	10,391.00	14%	4,450.00	24%	85% - 90%	-64%

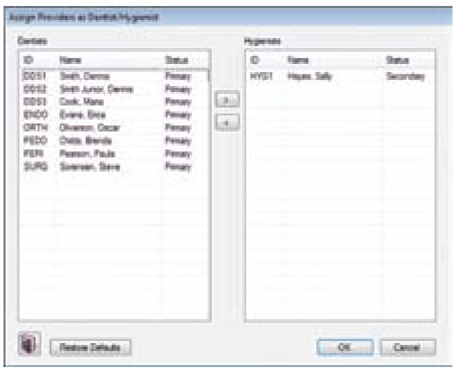
1 2 3 3 4 5 6 6 8

1 This shows the number of patients in your database who are considered active patients. This number is based on the last visit date in the Family File. It comes from the date range you set up in the Practice Advisor Setup. From the Practice Advisor dialog, click Practice Advisor Setup.



2 This is the dollar amount of finance charges, late charges, and production adjustments. The production adjustments are the adjustments you selected in the Assign Adjustment Types section of the Practice Advisor Setup. From the Practice Advisor dialog, click Practice Advisor Setup, then click Assign Adjustments Types as Production/Collections.

3 You specify which providers you want to count as dentists and which as hygienists by moving the provider aliases to the correct column in the Practice Advisor Setup. From the Practice Advisor dialog, click Practice Advisor Setup, then click Assign Providers as Dentists/Hygienists.



Page: 1 of 10

YTD May 10		Benchmark	Variance	
216,395.00	*100%*	100,000 - 200,000	66,395.00	
13,660.76				
230,055.76				
334.00				
647.89		1,250 - 2,500	-1,227.11	1
80.32		175 - 355	-184.68	1

YTD May 10		Benchmark	Variance	
170,917.00	*79%*	*65% - 75%*	*9%*	
334.00				
511.73		1,060 - 2,125	-1,080.77	2
63.44				
2,419.50				

YTD May 10		Benchmark	Variance	
45,478.00	*21%*	*25% - 35%*	*-9%*	3
43.00				
1,057.63		800 - 1,200	57.63	
132.20				
0.00				

YTD May 10		Benchmark	Variance	
69,374.00				
45,078.00	*65%*	*85% - 90%*	*-23%*	4

7

For a full explanation of each row and column in the Production section of the Practice Advisor Report, view the Help files within the Practice Advisor or view the Practice Advisor Tutorial in the Dentrix Resource Center. See "How to Learn More" on page 7 for instructions on accessing these resources.

8

This column shows the difference between your production statistics and the benchmark ranges. The variance is calculated using the average of the benchmark range and your MTD (month-to-date) statistics.

For example, the benchmark rage for monthly production amount is 20,000 - 40,000. The average of that range is 30,000, so the variance is based on that number. Since the MTD total is 30,183, the variance says that you are 183.00 over the benchmark of 30,000.

Because the variance is calculated based on the average of the benchmark range, you may have a negative number in the variance column but still be within the benchmark range. If your statistics are lower than the lowest end of the benchmark range, a yellow icon appears in this column. (See Note 7.)

7

This icon appears when the number in the variance column is negative. The number inside this icon corresponds to a set of recommendations for improvement listed in the Recommendation Footnotes section of the Practice Advisor Report. The recommendations were provided by practice management consultants including the Pride Institute and Jameson Management.

4

This column shows the monthly production benchmarks for your office. The benchmarks are the expected production ranges for a solo general practice (based on the national average). You can customize these benchmarks to fit your office.

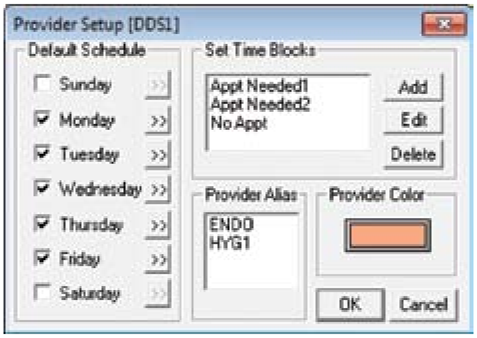
The benchmarks were recommended by practice management consultants including the Pride Institute and Jameson Management. You should only customize these ranges for your practice under the guidance of a consultant familiar with production norms in your area.

From the Practice Advisor dialog, click **Practice Advisor Setup**, then click **Benchmarks Setup**.

6

These rows show the total number of days the providers you included on the report were available. These statistics are calculated based on the providers' schedules you set up in the Provider Setup in the Appointment Book. In the Appointment Book, from the **Setup** menu, select **Provider Setup**, select a provider, then click **Setup**.

If the provider was available for less than five hours, the time is counted as a half day. If the provider was available for more than five hours it is counted as a full day.



5

This section shows the dollar amount of the treatment you diagnosed and the dollar amount of the treatment that was accepted by patients.

The dollar amount of treatment diagnosed is the total amount of all procedures that meet the following criteria:

1- Are part of a case you set as Recommended or part of the Default case in the Treatment Planner.

2- Were treatment planned within the date range of each column.

The amount of treatment accepted is the total amount for the procedures that were either completed within the date range or were part of a case you set as Accepted in the Treatment Planner.

Access Your Schedule Remotely

■ Roger Gagon

You're out to dinner on a Thursday night when a patient calls you on your cell phone. You soon learn that he was out to dinner also—and broke a tooth on an after-dinner mint. "Is there any chance you could get me in tomorrow?" he asks.

"One second, let me check."

Using Dentrix Mobile on your cell phone, you view your patient schedule and see that you have an opening in the morning.

"You're in luck—I have an opening in my schedule at 9:30 tomorrow morning. Will that work?"

"Perfect. Thanks, I'll see you tomorrow."

USING DENTRIX MOBILE

With Dentrix Mobile, your schedule and patient information is with you virtually everywhere you go. All you have to do is type mobile.ident.com in the address bar of the Internet browser on your mobile device. When the Dentrix Mobile login screen appears (Figure 1), enter your eCentral user name and password and select **Login**.

After logging in to Dentrix Mobile you can view your appointment list. From the Home screen (Figure 2), select **Appointments**, select **APPT** to view the Appointment Provider list (or leave **PRIMARY** selected to view appointments listed by primary provider), then select your provider alias that you use in Dentrix (such as DDS1). Your appointment list for the current day appears. **Note:** You can also view the schedules for other providers in your practice. If a provider is scheduled for more than one appointment at a time, Dentrix Mobile will display up to four simultaneous appointments (Figure 3).

You can also search for appointments by patient name, so when you get an after-hours call from someone requesting a new prescription, you can easily verify if the caller is a current patient. To do this, from the Dentrix Mobile Home screen, select **Patients**, then select the search field. Type at least two characters of the patient's name or phone number. Dentrix Mobile begins searching both first names and last names to find a match to the characters you entered (Figure 4). As you continue typing characters, the search results narrow. Select the patient's name from the list to show the patient's detailed information (Figure 5).

With Dentrix Mobile, accessing your schedule and patient information from a mobile phone is that easy. You can access Dentrix Mobile from the following mobile devices: Blackberry® Tour and Storm, iPhone™, iPad™, Palm Pre™, and Android™. The next time your patients need to call you when you're away from the office, you'll be ready with the information you need. **DM**

LEARN MORE

To learn more about how Dentrix Mobile can keep you connected with patients, or to sign up for this new service—which is free with your Dentrix Customer Service Plan—call 1-800-DENTRIX or visit www.dentrix.com/mobile.

Figure 1 You must log in to Dentrix Mobile.

Figure 2 You can select patient information or appointments.

Figure 3 You can view up to four simultaneous appointments.

Figure 4 You can search for patient names.

Figure 5 You can view detailed patient information.

ADDING A SHORTCUT TO YOUR HOME SCREEN

To make it even easier to access Dentrix from your mobile phone, you can add a shortcut to your iPhone Home screen (Figure 6) or other mobile devices. For example, to add a shortcut to your iPhone Home screen, from the Dentrix Mobile Login screen, click the Plus Sign (+) at the bottom of the Login screen, and select **Add to Home Screen**. On the Add to Home screen (Figure 7), select **Add**. The shortcut is added to your iPhone Home screen.

You may be able to add similar shortcuts on other supported devices. Refer to the documentation for your particular mobile device for specific instructions.

Figure 6 You can add a shortcut to your iPhone Home screen

Figure 7 The **Add to Home** screen

Patient Eligibility at a Glance

■ Gentry Winn

Does your office staff spend a lot of time on the phone with insurance companies checking patients' eligibility for insurance benefits? Do you wish there were a quicker and easier way? If you answered "yes" to both of these questions, maybe you haven't heard about the patient eligibility features of Dentrix and eCentral.

The eCentral Insurance Manager integrates with Dentrix, automating many of your routine communications with insurance payers and conveniently displaying

> By automating the time-consuming task of verifying insurance eligibility, your front office staff will spend less time on the phone with insurance payers and more time with patients.

eligibility information in the Appointment Book and Family File. By automating the time-consuming task of verifying insurance eligibility, your front office staff will spend less time on the phone with insurance payers and more time with patients and other office responsibilities. Additionally, by verifying insurance eligibility before a patient's visit, your staff will be more prepared for the appointment and better able to discuss treatment options. Since affordability is one of the barriers to case acceptance, knowing a patient's insurance eligibility status can help you plan your case presentation and prepare to offer appropriate patient financing options. Working together, the eCentral Insurance Manager and Dentrix can help you save time and money.

GETTING READY TO USE THE INSURANCE ELIGIBILITY FEATURE

Not all payers offer real-time insurance eligibility information. If you want to find out if a particular payer provides electronic insurance eligibility verification, visit www.dentrix.com/products/eservices/eclaims/payer-search.aspx. Under **Payer Search Engine**, type a payer ID or name, and then click **Find Payers**. In the list of matches that appears, you'll see an X in the ELG column beside the names of payers who provide real-time eligibility information.

You can also view a list of participating payers when you are logged into your eCentral account at https://ecentral.ident.com. Point to the **Insurance** tab, and then click **Patient Eligibility**. Next, click the **Payor List** link in the upper-right area of the Web page to view the list.

Before you can get real-time patient eligibility statuses in Dentrix, you must have an eCentral account, be registered to receive eligibility responses through the eCentral Insurance Manager, have eSync 2.7.7 or newer installed, and have G4 with Productivity Pack 7 or later installed. After these pre-requisites have been met, complete the WebSync Wizard setup, which allows you to schedule insurance eligibilities to be updated at the same time every day for patients coming in the next day.

UPDATING INSURANCE ELIGIBILITIES FOR SCHEDULED PATIENTS

Before you can have insurance eligibilities updated automatically, you must set up the WebSync Wizard. From any of the main Dentrix modules, click the DXWeb button on the toolbar  to open the DXWeb toolbar, click the Settings  button, click **WebSync Wizard** to start the wizard, and then set up the options in each section. In the **WebSync** portion, under **WebSync Options**, select **Correspondence Upload** and **Insurance Eligibility Upload**. When you get to the **Insurance Eligibility** portion, under **Appointments in Range**, set the appropriate time range. And after you have gone through all the options in the wizard, make sure you click **Finish** to save the changes.

The next time you perform a Web sync, the insurance eligibilities for all patients with appointments in the specified time range (from the WebSync Wizard setup) will be updated.

VIEWING AN INSURANCE ELIGIBILITY STATUS

You can view a patient's insurance eligibility status from the Eligibility icon in the Insurance block of the Family File and in the **Appointment Information** dialog box, which can be opened by double-clicking an appointment in the Appointment Book.

The color of the Eligibility icon  indicates the patient's eligibility status. A blue E on a white background indicates that the patient is  eligible for benefits. A gray E on a yellow background indicates one of the following:

- The patient's eligibility is questionable (for example, some subscriber information was missing, or an invalid NPI number was used). F or an eligibility status other than "Eligible," payers can use any of over 40 distinct statuses to indicate information is missing or invalid.

- The patient's eligibility has not been checked or entered manually from the Eligibility icon during the past five days.

- The patient's eligibility has never been checked or entered.

- The patient doesn't have insurance.

- The patient has insurance, but his or her insurance company does not supply eligibility information through eCentral.

Also, you can position your pointer over the Eligibility icon if you want to view a tooltip with the status and date from the last eligibility check.

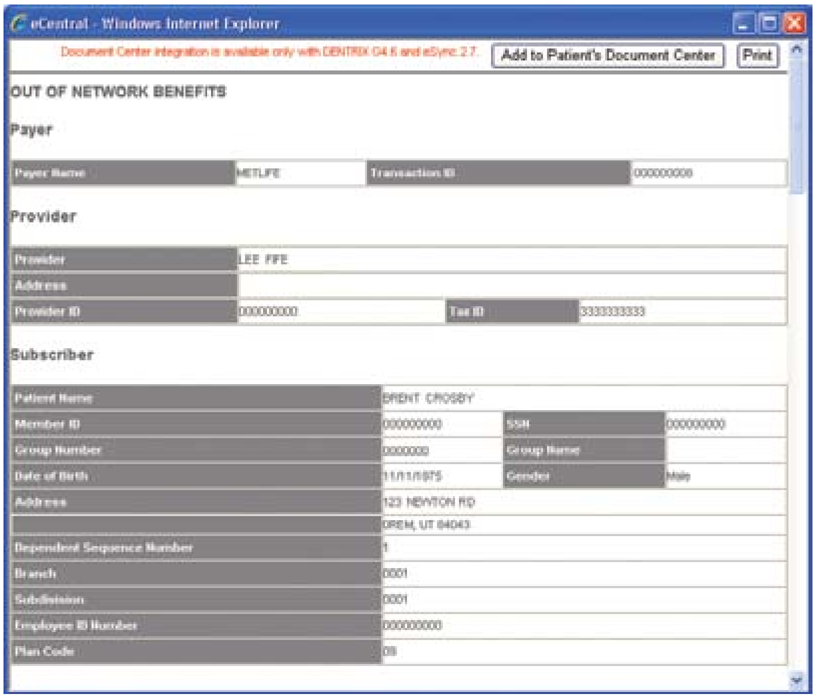
REQUESTING INSURANCE ELIGIBILITY FOR ONE PATIENT

In cases where the eligibility information for a patient may not be current (for example, because you haven't run a Web sync recently), you can request the most current eligibility information. To do this, from the Insurance block in the patient's Family File or from the **Appointment Information** dialog box (accessed by double-clicking the patient's appointment in the Appointment Book), right-click the Eligibility icon, and then click **Request Patient Eligibility via eCentral**. The Patient Eligibility page of the eCentral website opens in a Web browser window. The patient whose eligibility you are checking appears as the first name on the list, and an eligibility status is displayed in the **Response** column (Figure 1).

Note: Some submissions may take up to one business day to process. This is a limitation imposed by the clearinghouses and payers that don't fulfill eligibility requests in real time.

elect	Patient Name	Eligibility Date	DOB	Subscriber ID	Payor Name	Response
☐	Vand, Glenn	08/05/2010	11/11/1963	000-00-0000	Delta Dental of New Jersey	Eligible
☐	Voen, Alan	08/05/2010	11/11/1954	000-00-0000	MetLife	Eligible
☐	Bensch, Rick	08/05/2010	11/11/1963	000-00-0000	Delta Dental of New Jersey	Inactive
☐	Sierch, June	08/05/2010	11/11/1950	000-00-0000	Ameritas Life Ins Co (YES/NO)	Subscriber/Insured Not Found
☐	Sariat, Joseph	08/05/2010	11/11/1947	000-00-0000	Horizon Blue Cross Blue Shield	Inactive
☐	Rusa, Paul	08/05/2010	11/11/1950	000-00-0000	Aetna	Eligible
☐	Rosen, Greg	08/05/2010	11/11/1982	000-00-0000	Metropolitan	Eligible
☐	Vamir, Pat	08/05/2010	11/11/1954	000-00-0000	MetLife	Eligible

Figure 1 You can check a patient's eligibility for insurance benefits.



eCentral - Windows Internet Explorer

Document Center integration is available only with DENTRIX G4.6 and eSync 2.7. Add to Patient's Document Center Print

OUT OF NETWORK BENEFITS

Payer

Payer Name	METLIFE	Transaction ID	000000000

Provider

Provider	LEE FFE		
Address			
Provider ID	000000000	Tax ID	3333333333

Subscriber

Patient Name	BRENT CROSBY		
Member ID	000000000	SSN	000000000
Group Number	0000000	Group Name	
Date of Birth	11/11/1975	Gender	Male
Address	123 NEWTON RD		
	OREM, UT 84043		
Dependent Sequence Number	1		
Branch	0001		
Subdivision	0001		
Employee ID Number	000000000		
Plan Code	09		

Figure 2 You can view details regarding an eligibility returned by a payer and send that information to the Document Center.

VIEWING INSURANCE ELIGIBILITY DETAILS

The amount and type of available eligibility information varies widely by insurance company. There can be an eligible or ineligible status and date or any number of details, such as provider information, subscriber information, coverage percentages by procedure, deductibles and maximums, and limitations.

To view details regarding a certain eligibility check, from the Insurance block in a patient's Family File or from the **Appointment Information** dialog box (accessed by double-clicking a patient's appointment) in the Appointment Book, right-click the Eligibility icon, and then click **View Eligibility Detail Document** to open eCentral and view the eligibility details in a new Web browser window (Figure 2).

If you want to send the report to the patient's Document Center (you must be using eSync 2.7.7 or newer), click **Add to Patient's Document Center**.

In conclusion, by effectively automating the task of verifying insurance eligibility and providing a method to check patient insurance eligibilities in real time, Dentrix can save you time and money and help you be better prepared to discuss treatment options with patients. **DM**

LEARN MORE

To learn more about setting up and using the patient eligibility feature, see the Checking insurance eligibility topic in the Dentrix Help and the Patient Eligibility and Insurance Eligibility Setup topics in the eCentral Help. See "How to Learn More" on page 7 for instructions on accessing these resources.

Clinical Notes Made Easy

■ Melinda Dyches

You've just finished confirming tomorrow's appointments, so you begin pulling the patient charts to have them ready for tomorrow. That's when the hunt begins. You discover that the file for Tim Jones is missing. First you check to see if it was misfiled—honestly, how many ways can you spell "Tim Jones"? You look through your "in" boxes and the "to-be-filed" box. Not there. After drumming your fingers on your desk, you finally go to that one place where all missing charts go to hide: the doctor's office. There it is, under a pile of Dental and Golf magazines, right where the doctor left it after adding his clinical notes.

How can you avoid this all-too-frequent scenario in the future? The answer is to update patient chart and clinical note information using the computer. Dentrix makes it easy. Using Clinical Notes Templates, all the doctors and hygienists can easily record specific details in their clinical notes while maintaining the important consistency, accuracy, and legibility that's often missing from handwritten notes. Clinical Notes Templates can also help prevent spelling errors. (Have you ever noticed the many different ways people spell hygiene?) Not to mention the time you'll save! You can accurately record several paragraphs of patient notes in just a few minutes. With Clinical Notes Templates, you can also read all your clinical notes from any computer, and you can sign and lock the notes into history.

Clinical Notes Templates are included with your Dentrix Patient Chart. All you have to do is design your templates. Let's begin by looking at some typical new patient exam notes, which might look something like this:

Patient was seen for a New Patient Exam.
Xrays: FMX and BWX
CC: gums bleeding when brushing.
OH: Fair
Calculus: Moderate
Stain: Light
OCS: Neg

For consistency, the questions for a new patient exam should always remain the same. It's the answers that change from patient to patient. Here's the 90/10 rule I use: the 90 percent of text I write for every new patient exam—text that never changes—is work the computer can do; the information I change for each patient is usually only about 10 percent.

In the example above, the constants are:

Patient was seen for a New Patient Exam.
Xrays:
CC:
OH:
Calculus:
Stain:
OCS:

Because these clinical notes are for a new patient exam, this first line will never change. The other lines identify other clinical note details that will be recorded during each new patient exam.

Using Clinical Notes templates also eliminates the need for arcane abbreviations. For example, does CC in the example above stand for *Carbon Copy, Continuing Care, or Chief Complaint?* The answer is *Chief Complaint*. In the past when clinical notes were all handwritten, the healthcare system allowed for abbreviations so that doctors or hygienists didn't have to waste time writing out every word. Now that software can automatically enter the complete word—making it easier for people to understand what you mean—abbreviations are not necessary.

EXERCISE: DESIGNING A TEMPLATE

For practice, let's create a template in Dentrix. Follow the steps below to design a New Patient Exam template that you can use for clinical notes during every new patient exam.

With a patient selected in Patient Chart, click the **Clinical Notes** tab at the bottom of the window.

Next, click the Template Setup icon (Figure 1) on the right of the panel.

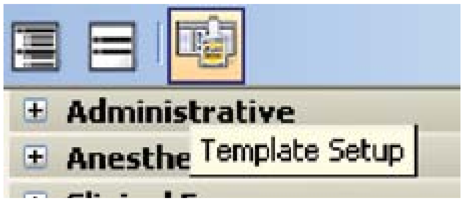


Figure 1 The Template Setup icon.

In the **Template Setup** dialog box, click **New**. This opens the **New Clinical Note Template** dialog box where you will create your template (Figure 2).

In the **Category** field, select the **Clinical Exams** category.

In the **Template Name** field, type *New Patient Exam.*

In the **Clinical Note Text** area, type *Patient was seen for a new patient exam,* then press **ENTER** to begin a new line.

Type the first question word, *Radiographs*, followed by a colon and a space.

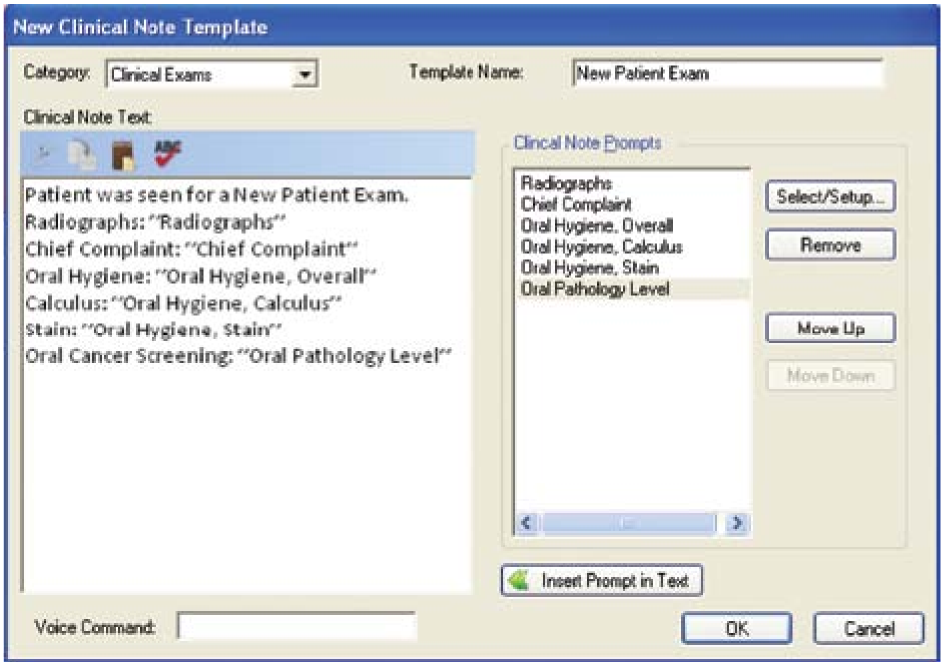


Figure 2 The New Clinical Note Template dialog box.

Figure 3 Creating your custom prompts.

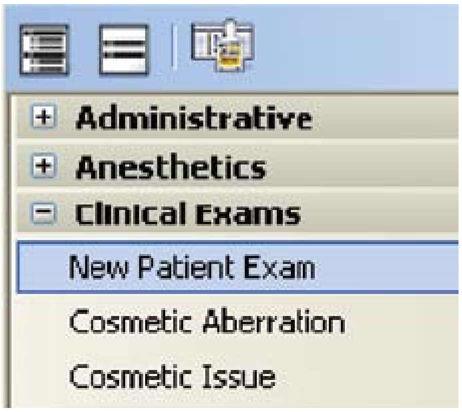


Figure 4 The New Patient Exam you created.

Figure 5 A custom prompt helps you record clinical notes.

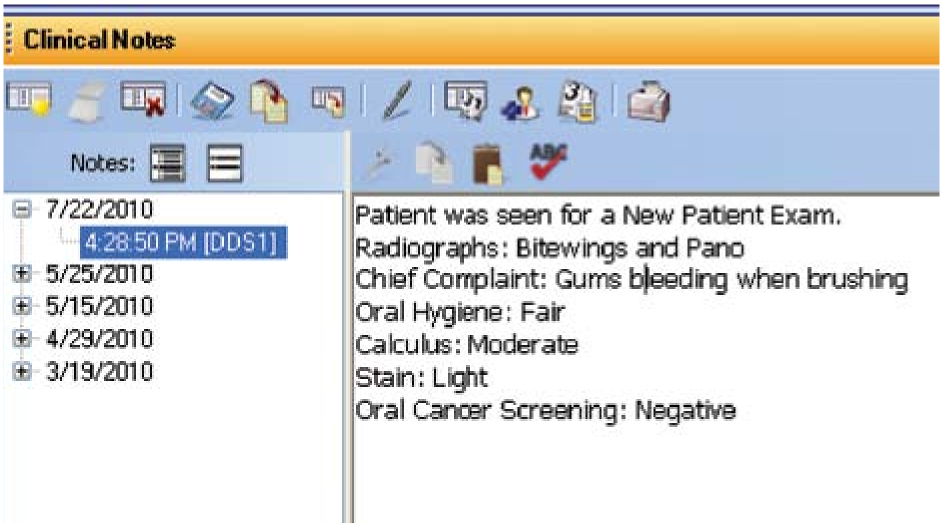


Figure 6 The finished Clinical Note in Patient Chart.

ADDING A PROMPT TO THE TEMPLATE

Now we'll add the first prompt. Click **Select/Setup** to display the **Clinical Note Prompts** dialog box with predefined prompts that you can use.

We want to add a prompt that reads "Radiographs," but this prompt is not available in the list. If a prompt you need is not listed, you can create your own. Click **New** to display the **New Prompt** dialog box (Figure 3), and type the name of your prompt, *Radiographs*, in the **Prompt Name** field.

In the **Prompt Text** field, type *What radiographs were taken?*.

The Response Type gives you different options for your answers. In this case since multiple answers are possible, choose **Checkbox Responses.**

Now enter all the possible answers that could come up for this question, one answer per line, as shown in Figure 3.

When finished, click **OK**, then **OK** again. Now click **Insert Prompt In Text**.

Using Figure 2 as a guide, add the other prompt questions and answers. When finished, click **OK** and then **Close**.

USING THE TEMPLATE

Your template is now ready to use, and you can find it under the Clinical Exam category in the clinical notes list (Figure 4). Click the New Clinical Note icon, then double-click **New Patient Exam**, and the first prompt appears (Figure 5).

Select the answers to the questions you have defined. When you finish responding to the prompts, your completed clinical note will appear in the Patient Chart (Figure 6) with the custom answers that you have chosen.

Now that your template is set up, adding specific information for a new patient exam is a snap! All the other types of clinical notes you record can be set up with a similar template just as easily to improve efficiency, accuracy, and consistency. **DM**

LEARN MORE

To learn more about using the Clinical Notes Templates, see the following topics in the Dentrix Help: Creating and editing clinical note templates; Creating clinical note prompts; Adding clinical notes using templates. You can also visit the Dentrix Resource Center to view the Clinical Notes Management webinar. See "How to Learn More" on page 7 for instructions on accessing these resources.

Melinda Dyches is a field training manager for Henry Schein Practice Solutions. Her email address is melinda.dyches@henryschein.com.

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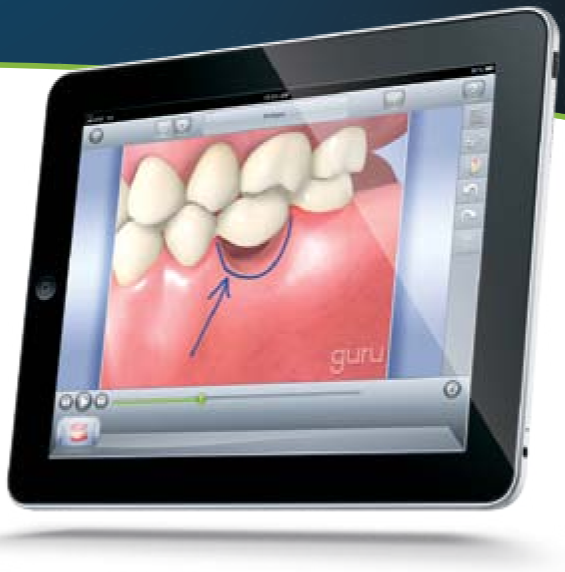

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Minding Your Reminders

■ Roger Gagon

Have you ever tied a string around your finger to help you remember something? I have. The problem is, I always have too many things to remember and not enough fingers. Occasionally I forget things—like my last dental appointment (oops).

A missed appointment affects the bottom line for dental offices, so many dentists charge a fee for missed appointments. But a late fee may not cover payroll costs when staff members are idle; nor does it cover the lost-opportunity costs when other patients might have been scheduled in the available time slot. The best solution is to try to prevent no-shows.

Of course some missed appointments are unavoidable, such as when patients suddenly become ill. But studies about why patients miss appointments reveal that often patients simply forget the appointment. That's why sending appointment reminders is essential for improving your practice's profitability.

ECENTRAL AUTOMATES APPOINTMENT REMINDERS

If you use eCentral, appointment reminders don't require you to spend time calling people or searching through your Appointment Book. eCentral reads information from your Dentrix database, such as the email address, mailing address, mobile number, appointment information, and continuing care dates. (You'll need to make sure the patient's email address, mobile phone number, and so forth are included in their Family File.) Then, using your custom settings in the DXWeb Toolbar, eCentral determines who will receive reminders and when reminders will be sent. The Communication Manager then formats the reminders according to your preferences. Once set up, your patients receive their reminders automatically.

THREE WAYS TO SEND REMINDERS

With eCentral, you can use up to three different methods to automatically remind your patients about their appointments: email messages, text messages, and printed postcards. Research has shown that most adults in the U.S. have a cell phone, an email account, or both (see "Email and Cell Phone Use in the U.S."). These may be your best options for appointment reminders since eCentral's Communication Manager currently includes unlimited email and text messages bundled into its monthly price. You may want to send automated email reminders one or two weeks before the appointment and a follow-up text message reminder one or two hours before the appointment. One benefit of using email reminders is that when patients confirm their appointment by email, the appointment confirmation is automatically updated in the Appointment Book after the next WebSync runs. This is a big time saver because the office staff then has to contact only the patients who didn't confirm by email or who don't have an email address.

If you want to reach those patients who don't have access to a cell phone or email, or if you simply prefer to send a printed postcard, the Communication Manager currently includes over 120 different postcards you can choose from (Figure 1). Postcards are grouped into several categories, such as "Holiday," "Pediatric," "People," and "Seasons." Printing and mailing the reminder postcards is part of the electronic service—it happens automatically for patients with scheduled appointments. The cost for the postcard and postage (less than 50 cents per postcard) is simply added to your monthly eCentral statement. If you're not already an eCentral customer, we have promotional offers that make this a great time to get started. For more information, see www.dentrix.com/products/eservices/ecentral/ or call 1-800-DENTRIX to register for any of the eCentral services.

SETTING UP CORRESPONDENCE IN THE WEBSYNC WIZARD

You'll first need to set up your patient correspondence using the WebSync Wizard. To do this, on the main toolbar for any Dentrix module (such as Appointment Book), click the DXWeb icon.

From the DXWeb Toolbar, click the Settings icon and select **WebSync Wizard**.

The WebSync Wizard opens to the Start screen.

Click **WebSync** to display the WebSync screen, make sure **Correspondence Upload** is selected, and then click **Correspondence** in the navigation tree at the left of the WebSync Wizard (Figure 2).

Under **Correspondence Types**, select the correspondence types you want to enable—**Email**, **Text Message**, and/or **Postcard**. Under **Select Correspondence**, click one of the default correspondence

Front of Card Back of Card

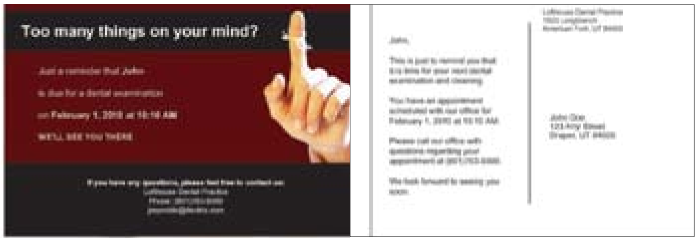


Figure 1 You can choose from over 120 different reminder post cards.

Figure 2 Set up your reminder correspondence in the WebSync Wizard.

Routine patient appointment reminders can have a significant impact on your practice's profitability.

types. Next click **New** to create a new correspondence type, or click **Edit** and change the settings as desired.

When you're finished setting up the correspondence, you can go through the other options in the WebSync Wizard or click **Finish** in the navigation tree on the left to save your changes and settings.

SETTING UP CORRESPONDENCE IN ECENTRAL

Once your correspondence is set up in the WebSync Wizard, you're ready to set up your communication campaign in eCentral. After logging in to eCentral (at ecentral.ident.com), on the **Communications** tab, click **edit email templates**. Here you can select and customize one of the many standard email templates that are supplied for your email and postcard campaign (although customizing is not required). Select the basic template you want to send, click **Edit**, and make any needed changes. Don't replace the information in double brackets, such as [[ApptDate]]—this will be filled in automatically using the data in your Dentrix database. If you want your patients to confirm their appointment by email reply instead of by phone, you may want to change the "Please call…to confirm" text. When you're finished, save the template using the Save icon and specify a new template name.

Now, from the **Communications** tab, click **email/postcard campaigns**. Here's a tip: You can adjust the same settings from the WebSync Wizard's Correspondence screen by clicking **Edit** (see Figure 2), selecting a correspondence type, and then clicking the **View/Edit Template** link.

After selecting the type of correspondence you want to enable (such as Appointment Reminders), click the **Edit** button next to the email or postcard campaign, and specify whether you want to enable an email campaign, a postcard campaign, or both. Click **Next** and select the templates you want to use for emails and postcards.

You can set up a similar reminder campaign using text messages. On the **Communications** tab in eCentral, click **text message campaigns**. After clicking the Edit button next to a text message campaign, you can configure the campaign. You can send a test message to your own mobile phone to verify that your text messages arrive and appear correctly.

If you need help using any of the options or features in eCentral's Communication Manager, click the Help link in the upper right corner of eCentral for more information.

With eCentral's Communication Manager, there's really no excuse for me to forget my next dental appointment. **DM**

EMAIL, CELL PHONE USE IN THE U.S. STILL RISING

Research shows that email and cell phone use is on the rise and now reaches most Americans. According to the Pew Research Center, a nonpartisan organization that researches information on trends shaping America, over 65% of adults in the U.S. use email.

Statistics show that the percent of Americans using cell phones is even higher. According to Pew, 83% of all adults living in the U.S. own cell phones. Nielsen Mobile, a service of the Nielsen Company, puts the number at 86%. Several researchers and wireless organizations, such as the International Association for the Wireless Telecommunications Industry (CTIA) claim that total U.S. cell phone penetration reached 91% in December 2009. Multiple sources indicate that 95-98% of today's cell phones are capable of sending and receiving text messages. Pew reports that 72% of all Americans send or receive text messages, and that number jumps to 95% for cell phone users between the ages of 18 and 29.

Simplifying Collections with the Collections Manager

■ Gary Frazier

Let's face it—to have a successful practice you have to manage your accounts and be a good dentist. And sometimes, despite your best efforts, collecting on your accounts can be difficult. The trick is to increase your collection rate and reduce the number of accounts receivable that become bad debts. And the window for successfully collecting past due payments may be shorter than you realize. Many business consultants agree that account balances should not extend beyond 30 days. Beyond that time, the likelihood of ever collecting these debts decreases every day. While you could pay a collection agency or an attorney who specializes in collections to manage your past-due accounts, many of your collection issues could be resolved simply by contacting your patients early on concerning their account balances—before they become a problem.

To help you follow up on past-due accounts, the Dentrix Collections Manager allows you to generate a list of accounts based on the criteria you specify and set priorities to determine which accounts to contact first. These criteria can include account balances, number of payments missed (if the patient has a payment agreement), account aging, insurance claim aging, minimum balance, and last payment date. The Collections Manager then generates a list of guarantors for you to contact. Through the Collections Manager, you have access to all of a patient's account information and the Dentrix tools that you need to manage your accounts receivable, including letter merge, guarantor notes, billing statements, and the Office Journal.

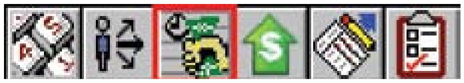
> Using the Collections Manager, you have all the account information that you need without having to open each guarantor's Family File.

Using the Collections Manager, you can contact your patients by e-mail, mail, or phone. Each time you try to contact a patient you can enter notes about your contact attempt in the Office Journal. You can also enter guarantor or billing statement notes to remind your patient of the terms of any agreements you may have reached. You can even set up a payment agreement with your patients and set terms, such as finance charges, interest rates, late charges, grace periods, and payment intervals that are mutually agreeable. You determine how flexible these terms are on a per-patient basis. With a minimum of effort on your part, you can help your patients pay their overdue balances.

SETTING UP A VIEW

Before you can generate the Collections Manager Report, you need to determine what information to include in your view. Once you have set up a view, you can sort the Collections Manager list according to the columns you choose to display and filter your accounts according to the criteria you determine is most important.

From the Office Manager toolbar, click the Collections Manager button.



The **Collections Manager View** dialog box appears (Figure 1). Specify a range of guarantors that you want to include in the list. The default is to list all guarantors, but if you have a large number of patients, you may want to restrict the list to make it more manageable. For example, you could create a list consisting of all guarantors with last names beginning with the letters A through J. Later, you could list only the K through S guarantors and finally T through Z for the last group.

However, even these lists could be large, so the Collections Manager allows you to narrow the criteria even further by restricting the billing types you want to include. For example, rather than using the default setting and listing all billing types, you could clear the default and list only "Bad Debt – to collections" accounts. If that's too restrictive, simply press the CTRL key and select up to 10 billing types to include in your list. You can also customize these billing types to meet your particular needs. Many offices use customized billing types, such as Ortho or Medicaid, to focus their collection efforts on those who actually owe a balance.

If your list is still too unwieldy, you can restrict the list by provider or minimum balance. Why spend your time on account balances that are less than $25.00? The amount you set is up to you. Remember to

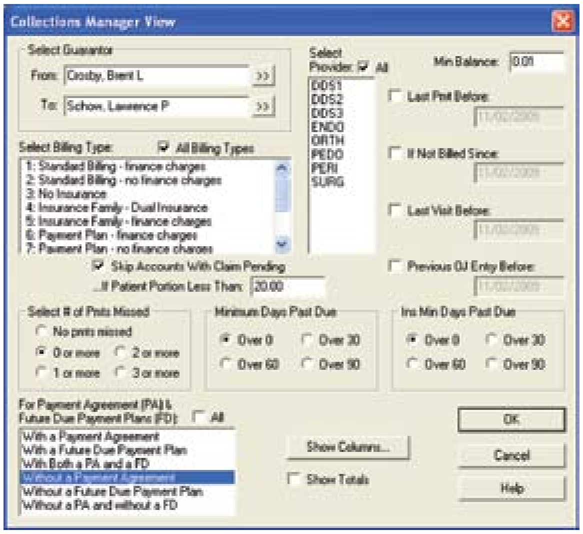


Figure 1 Setting up a Collections Manager view is the first step in managing your accounts receivables.

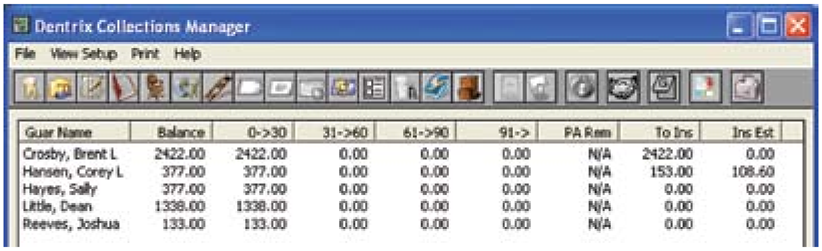


Figure 2 Collections Manager generates a list of those who met your view criteria.

Figure 3 Click the Quick Letters, Send Message, or More Information (Dial) buttons on the Collections Manager toolbar to contact your patients by mail, e-mail message, or telephone, respectively.

weigh the costs of collecting a debt against the amount of the debt. Why trip over a dollar to pick up a nickel?

You can also list only accounts from which you received a payment before a specified date, or you can skip accounts with pending insurance claims that have an estimated patient portion of less than $20.00 (or whatever amount you determine is appropriate). Other helpful options include the ability to filter your list by the number of payments missed or the number of days an account or an insurance claim is outstanding (Figure 2).

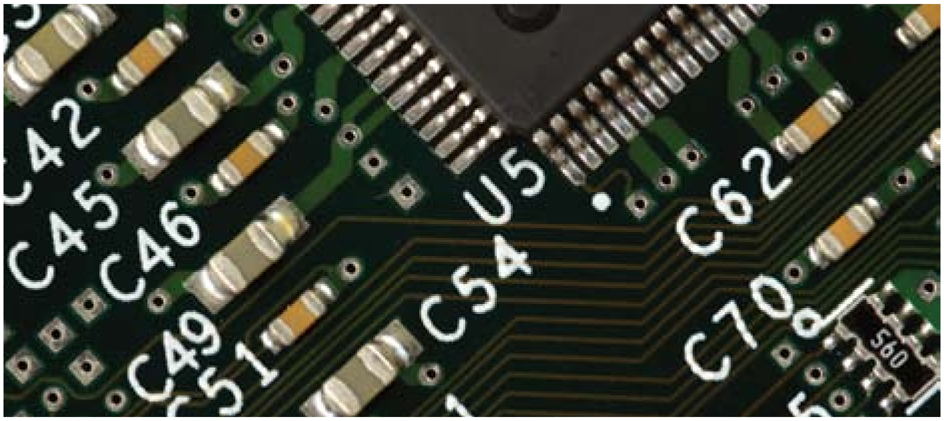
CONTACTING ACCOUNTS

Once you have created a workable list, you can then choose how to contact these accounts. By clicking the Quick Letters, Send Message, or More Information (Dial) buttons on the Collections Manager toolbar, you can contact your patients by letter, e-mail message, or phone, respectively (Figure 3). If you telephone your patients through the **More Information** dialog box, you can click the Add Journal Entry button to add a journal entry to the Office Journal, documenting the contact. If the amount owed is small and the account is not more than a few days late, consider making a phone call or sending an e-mail message. These contact methods are often quite effective, especially for long-time patients in otherwise good financial standing. For larger amounts, or if the account is more than 30 days overdue, a letter generated through the Quick Letters feature is likely a better choice as a follow-up to previous attempts to contact your patient.

Using the Collections Manager doesn't mean that collecting the money owed you will not be unpleasant at times. It also doesn't guarantee that you will collect on all of your outstanding accounts. However, using the Collections Manager to your full advantage will help you stay on top of your accounts and will keep your revenue stream flowing. **DM**

LEARN MORE

To learn more about using the Collections Manager, see the following topics in the Dentrix Help: Collections Manager Overview, Setting Up a View for Collections Manager. You can also visit the Dentrix Resource Center to view these on-demand training titles: Collections Management, Treatment Manager, and Collections Manager. See "How to Learn More" on page 7 for instructions on accessing these resources.



Store Your Documents Digitally

■ Roger Gagon

For decades, dental offices have stored vast repositories of paper documents—patient information forms, health histories, treatment and other consent forms, patient letters, referral letters, X-rays, and insurance explanation of benefits (EOBs), to name just a few. Managing the constant flow of paper documents through your office can be a challenge. Add to that the expense of paper, printer ink, wear and tear on your printers, and office space, and you begin to see that printing and managing all that paper has a real cost associated with it. And how do you protect all that paper from fire, flood or some other catastrophic event?

The solution to these challenges is storing your documents electronically. As practice management software becomes a more integral part of the dental office, more and more dentists are storing their documents as computer files and backing them up to an off-site location along with the rest of their practice database. The Dentrix Document Center can help you acquire and store all your documents electronically.

STARTING AND SETTING UP DOCUMENT CENTER

You can access the Document Center from the Dentrix Quick Launch menu or by clicking the Document Center button found on the toolbar in most Dentrix modules. 

The first thing you'll want to do is check the location for your documents. From the Document Center Setup menu, click **Document Center Preferences**. The default documents directory is already in your Data directory, so you probably won't need to change it. Just be sure the **Documents Directory** field specifies a folder location that is included in your regular data backups, and then click **OK**.

As you add documents to the Document Center, you will file your documents in folders that are associated with a patient (Figure 1), provider, or other entity such as insurance carrier or referral source. The Document Center includes several default folders you can use to organize your different types of documents. You can also create additional folders by clicking **Setup**, then **Document Types**. In the **Description** field, type a name for the new document type such as Reports, then click **Add** and **Close**.

IMPORTING AN EXISTING FILE

You can import many of your existing computer files directly into the Document Center to keep them in a single documents repository and ensure that they get backed up. The Document Center supports the following types of document files:

- Adobe Acrobat (*.pdf)
- Microsoft Word (*.doc, *.docx)
- Microsoft Excel (*.xls)
- Microsoft PowerPoint (*.ppt)
- Picture Files (*.bmp, *.gif, *.jpg, *.png)
- Plain Text (*.txt)
- Rich Text (*.rtf)

To import a file, from the Document Center's **Acquire** menu, click **Import From File.** In the **Import** dialog box, use the **Look In** list to navigate to the file folder containing your file, select the file you want to import, and then click **Open.**

In the **Document Information** dialog box (Figure 2), use the **Document Type** field to select the folder where you want to store the document. You can also add a **Reference Date**, **Description**, and **Note** for the document. Later, you can also add a signature using an electronic signature pad. After a document is signed, the icon that appears next to the document in the document tree changes from  to , and

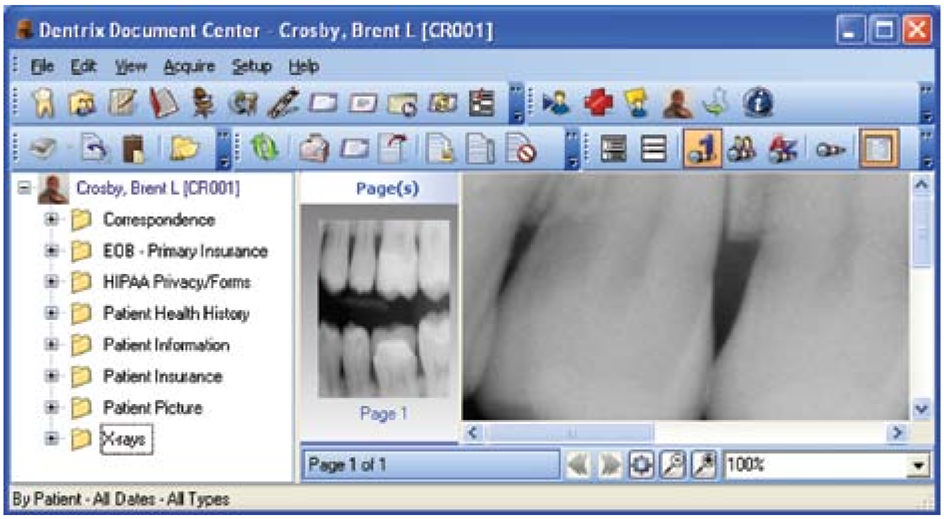


Figure 1 The Document Center lets you organize your documents by patient, provider, employer, insurance carrier, or referral source.

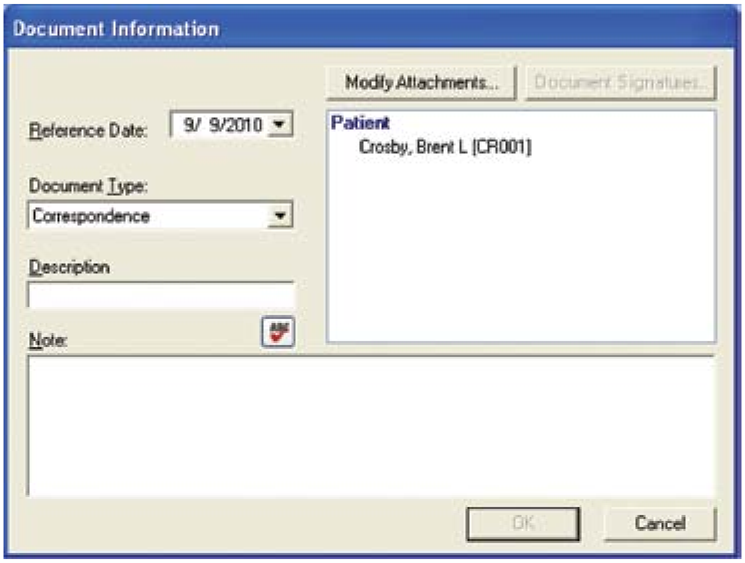


Figure 2 You provide information about documents in the Document Information dialog box.

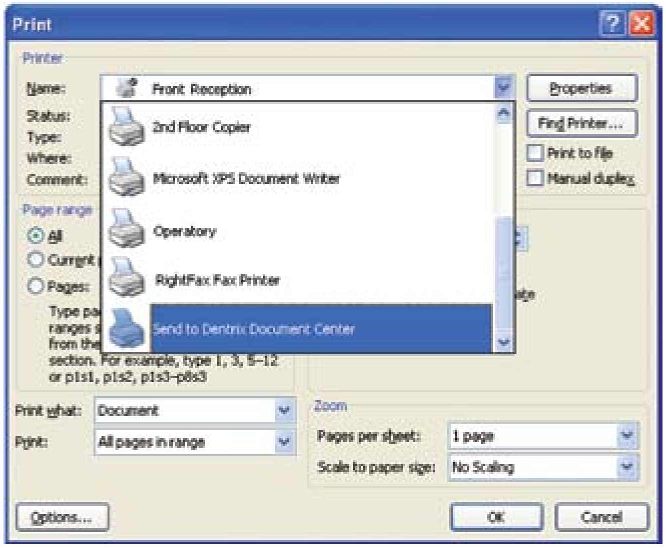


Figure 3 Select this option to print directly to the Dentrix Document Center.

the document information (Reference Date, Document Type, Description, and Note) is no longer editable.

Once you have imported a file into the Document Center, you may want to delete the file from its original location (especially if it contains confidential patient information). If you have set up password security in Dentrix, you can even restrict access to these documents to those with the appropriate Dentrix security rights.

PRINTING TO THE DENTRIX DOCUMENT CENTER

You can "print" files directly into the Document Center as electronic documents. For example, if you have a computer file open in another program (such as Microsoft Word, Excel, or PowerPoint), and you want to save it directly to the Dentrix Document Center, from the program's **File** menu, click **Print**. In the **Name** field of the **Print** dialog box, select **Send to Dentrix Document Center** (Figure 3), then click **OK**.

Using this same method, you can add treatment cases from the Dentrix Treatment Planner directly to the Document Center. You can also print Dentrix reports from Office Manager directly to the Document Center by changing the reports printer in **File > Printer Setup.**

Files that are printed to the Document Center in this manner are added to your unfiled documents. To view the unfiled documents, click the Unfiled Documents button  on the toolbar. To move unfiled documents to the appropriate folder, with a patient or provider selected in Document Center, open the **Document Information** dialog box (Figure 2) using the toolbar button in the Unfiled List and enter the required information, or click and drag the document from the Unfiled Documents window to the desired patient or provider folder.

SCANNING TO THE DENTRIX DOCUMENT CENTER

If you have an office scanner or digital camera, you can use it to scan existing paper documents directly into the Document Center. From the Document Center's **Acquire** menu, point to **From Device**, and then select the device you want to use to acquire the document. Once you have finished acquiring the document, the **Document Information** dialog box appears (Figure 2), in which you can provide information about the document and decide where to store it in the Document Center.

EXPORTING DOCUMENTS

The Document Center stores documents in a proprietary format so they can be accessed only through the Document Center. However, you can export any document to open and view in other programs or to send as an e-mail attachment.

To export documents from the Document Center, select the documents in the document tree. From the **File** menu, click **Export Document(s)**. In the **Export Document As** dialog box, specify a file name and location for the exported file, then click **Save**. The document is exported to its original format.

With Dentrix Document Center, you can keep your practice documents organized and backed up. You can also save money and space as you transform your office from "paper" to "paperless."

LEARN MORE

To learn more about using the Document Center, see the Document Center section of the Dentrix Help. To learn more about backing up data and security rights, see the following topics in the Dentrix Help: Backing up the Dentrix database, Assigning user security rights, and Description of user security rights. You can also visit the Dentrix Resource Center to view these on-demand training titles: Storing Documents in the Document Center, Going Paperless, and Going Paperless with the Document Center. See "How to Learn More" on page 7 for instructions on accessing these resources.

What to Do When Production is Down

■ Amy Morgan

Think about the last time you were on an airplane and you heard the flight attendant say these words: "In the unlikely event of a water landing. . . ." If you're like me, you'd probably prefer not to think about water landings. Don't we all have a strong need to believe the airplane will land safely and at the desired destination? Some doctors and team members have similar feelings when it comes to their practice management statistics. They want to believe that the team will reach its production goals without any special effort, and they prefer not to analyze the production data. Why? Because if the news is bad (like a water landing), it means the team may need to make unplanned—and perhaps unpleasant—changes in order to reach their desired destination. I have tremendous empathy for teams who feel they are working as hard as they can and yet continue to be confronted with statistics that are below goals. This kind of experience can be a tremendous de-motivator and often leads to stress, denial, analysis paralysis, judgment, and blame. Why would anyone want to subject him or herself to that?

So, what if a team is tracking their productivity monthly and year-to-date (YTD) and they are continually hitting below the benchmarks? What can the practice proactively focus on that will have a direct impact? As a practice management consultant, I can say the worst thing to do is nothing. Any focused action has the potential for improving the situation. For production downtrends, there are countless opportunities to immediately increase dentist and/or hygiene production. Half the battle is won as soon as the team sees a potential positive solution and unites collaboratively to implement it.

For production downtrends, there are countless opportunities to immediately increase dentist and/or hygiene production. Half the battle is won as soon as the team sees a potential positive solution and unites collaboratively to implement it.

Follow these three simple steps and you will see improvements.

STEP 1: ALWAYS START WITH YOUR CUP "HALF FULL."

There's nothing worse than feeling that you're starting in a negative position. If the team has just discovered they were short $10,000 in productivity at month's end, it can feel overwhelming to try to make up that deficit and meet next month's production demands at the same time.

To get started, focus on next month's potential production first. Have the team add up the production totals of what's already scheduled for both the doctor and the hygiene department. Subtract that from the goal and then have the team brainstorm how to achieve the difference by focusing on specific patients and procedures. Once the new month is action-planned, discuss how the team can begin making up the $10,000 deficit from the previous month (e.g. in one month's time or over an extended period). The team will then be able to monitor their success in smaller increments and begin to see progress.

The Dentrix Practice Advisor, which is available for Dentrix G4 users who have installed Productivity Pack 7, makes it easy to track critical production statistics and other key performance indicators (KPIs) in a single, consolidated report. To generate the Practice Advisor Report, open the Office Manager, and from the **Analysis** menu, click **Practice Advisor** to open the Practice Advisor window. Click **Practice Advisor Report** to open the Practice Advisor Report dialog box, and then click **Preview**. The production statistics appear at the top of the report. Yellow yield signs appear beside each statistic that falls below industry benchmarks. The numbers in the yield signs correspond to suggestions for improvement listed in the footnotes at the end of the report.

STEP 2: DON'T "SPRAY AND PRAY."

When there is a downtrend, the tendency is to panic and try to fix anything and everything that may not be functioning at an optimal level. If, for example, the focus is on improving doctor productivity, create an action plan to address that—and only that.

Based on the suggestions supplied by the Practice Advisor, have the team pull the ASAP List to identify patients who might be willing to come in for treatment right away, as well as the Unscheduled List to identify patients who missed appointments and might be willing to reschedule during the next week or two. Both lists are available under the **Appt Lists** menu in the Appointment Book. The team can also use the Treatment Manager to find patients with outstanding treatment plans and benefits remaining. To use the Treatment Manager, open the Appointment Book, and from the **Options** menu, click **Treatment Manager** to open the Treatment Manager dialog box. After you select the desired settings, click **OK** to generate a list of patients to contact.

Remember, if doctor production is your focus, fight the impulse to address other issues, such as marketing, continuing care or financial arrangements, at the same time. Frantic activity creates spotty results.

STEP 3: MONITOR DAILY AND PRAISE PROGRESS.

If you wait until the end of the month to notice that none of your plans were implemented or effective, expect your team to get upset. If you are "all-in" when it comes to coaching the team to excellence, then you must be active and timely with your observations and feedback. If on the first day of the new month, your team has added $1500 in new treatment to the schedule, you need to praise the team's progress, analyze the success points and reinforce the remainder of the plan.

If you follow these simple steps and use the Dentrix tools at your fingertips, you can help the practice remain positive and focused under any circumstances. So in the "unlikely event of a water landing," don't grab a life jacket. Embrace the Dentrix Practice Advisor instead, do something differently, and get that different result! DM

Learn More

To learn more about the Dentrix Practice Advisor, see the Practice Advisor report topic in the Dentrix Help. You can also visit the Dentrix Resource Center to view the Practice Advisor tutorial and download the Dentrix G4 Reports Reference. See "How to Learn More" on page 7 for instructions on accessing these resources.

Amy Morgan is a renowned dental consultant and CEO of Pride Institute. Amy is also a contributing designer for the Dentrix Practice Advisor. She can be reached at AmyM@prideinstitute.com, www.prideinstitute.com, or 800-925-2600.

Tools to Boost Production

ASAP List:

Identify patients who might be willing to come in for treatment right away. To generate the ASAP List, open the Appointment Book, and under the **Appt Lists** menu, click **ASAP** List. By default, the ASAP List displays existing appointments for the next seven days that have been flagged as ASAP. To expand the search for ASAP appointments, increase the number of days in the **Span of Search** field.

Unscheduled List:

Identify patients who missed appointments and might be willing to reschedule during the next week or two. To generate the Unscheduled List, open the Appointment Book, and under the **Appt Lists** menu, click **Unscheduled List.**

Treatment Manager:

Find patients with outstanding treatment plans and benefits remaining. To use the Treatment Manager, open the Appointment Book, and from the **Options** menu, click **Treatment Manager** to open the Treatment Manager dialog box. After you select the desired settings, click **OK** to generate a list of patients to contact.

Upgrading to Dentrix Helps Dr. Jill Smith Achieve Her Practice Goals

ABOUT DR. JILL SMITH

Dr. Jill Smith's dental office is similar to many other dental practices: one doctor, four operatories, two assistants, two hygienists, and two administrative coordinators. Like most practice owners, Dr. Smith is constantly looking for ways to save time and money, increase production, improve patient care, and build a positive reputation. Dentrix helps her achieve those goals.

CHALLENGE

When Dr. Smith bought her dental practice in 1996, she knew that one of the first upgrades she needed to make was to the computer system. The DOS-based software the office was using didn't meet the needs of a modern office. She wasn't impressed, and neither were her patients.

After researching and reviewing seven different software programs, Dr. Smith chose Dentrix. "I knew immediately that I'd made the right decision," she said. "Even though I only used the Ledger and accounting portions of the software initially, I could see that the potential was there to do a lot more. It was up to me to implement it." And implement it she did.

DENTRIX SOLUTION

"Training was done in the office, and the staff learned and adapted quickly," said Dr. Smith. "Any new staff member is trained easily, either in the office by a certified Dentrix trainer and other staff members, offsite at workshops, or online through webinars."

The result is that staff members are more productive. The software allows multiple providers working on different days to easily access and share the same clinical information. It also makes it easy for patients to accept and move forward with previously recommended treatment plans—even if they were declined in the past—since Dentrix saves treatment plans for review at future appointments.

> "My clientele expect high-tech, high-quality, state-of-the-art care from my office. Dentrix lets me provide that." ~ Dr. Jill Smith

Dentrix has also made a significant impact on the organization of the office. Once appointments are scheduled in the Appointment Book, eCentral automatically reminds patients about upcoming appointments. "eCentral sends out reminder emails, text messages, and postcards to patients with upcoming appointments," said Dr. Smith. "We also use eCentral to automatically send reminders to unscheduled continuing care patients. We use the Unscheduled List and Treatment Manager to maintain production and patient care."

Dr. Smith also uses Dentrix to keep up with the billing and collections processing, helping her avoid the "million-dollar filing cabinet" full of unrealized earnings that consultants often talk about. "eClaims has expedited our reimbursement time, and eCentral has opened the door to email confirmation, easy online verification of eligibility, instant claim tracking, and online account management for patients," said Dr. Smith. "Dentrix also makes billing and collections easier with its reports and Collections Manager."

And if questions about using Dentrix come up, help is only a phone call away. Dr. Smith said, "Dentrix customer service is excellent. All of the software updates come as soon as they are released, and you can call technical support with any Dentrix question to get assistance. They walk you through everything, from the most basic to the most complex task."

RESULTS

So, what does all this mean for Dr. Smith's dental practice? The ability to integrate all aspects of a patient's care—from registration forms to photos to treatment planning—into one software program has created a much more seamless experience for her patients. "Dentrix makes it possible for us to have all of our patients' demographic and clinical information at our fingertips, facilitating information collection and reporting as well as better customer care," said Dr. Smith.

Patients have definitely noticed the difference. Dr. Smith notes, "My clientele expect high-tech, high-quality, state-of-the-art care from my office. Dentrix lets me provide that."

The bottom line? By using Dentrix, Dr. Jill Smith is achieving the goals that all dentists have: she's saving time and money, increasing production, improving patient care, and building a positive reputation. Dentrix is proving to be one of the best investments Dr. Smith has made for keeping her practice moving forward. **DM**

Do you want us to feature your practice in a Dentrix Magazine case study? Send an email message to dentrixmagazine@henryschein.com and tell us how using Dentrix has improved your practice. Please type "Case Study" in the subject line.

closing the year the right way

By Jason Coggins

As year-end approaches, dental offices begin the process of closing their fiscal year in Dentrix. Closing the year is an opportunity to purge old Appointment Book data, keep insurance benefits and deductibles up-to-date, and review helpful year-end information from several Dentrix reports. The Dentrix Customer Support team wants to help make that process as easy as possible by providing some helpful advice and tips. This article provides information we have found to be helpful in addressing three common questions that frequently arise at this time of the year:

1. How do I close out the year? Are there special utilities or processes that I should run?
2. What do I do with outstanding insurance claims from the previous year?
3. Are there any reports that may be beneficial to run?

CLOSING THE YEAR

Dentrix does not require a special process for closing the year. Closing the last month of the fiscal year is all that is required to close the year. This can be done using the month-end update or by running the Month End Wizard.

When you first set up your practice, you specified a fiscal year beginning month. You can find the fiscal year beginning month setting in the Office Manager. To do this, from the **Maintenance** menu, point to **Practice Setup**, and then click **Practice Resource Setup**. Under **Practice Information**, click **Edit**. In most cases, the fiscal year starts in January, but the following procedure works regardless of when the fiscal year begins.

When it is time to close the last month of the fiscal year, make an up-to-the-minute backup of your practice data, and then close Dentrix on all but one of the computers in your office. Open the Ledger. From the **Month End** menu, click **Month End Update** to display the **Close Out Month** dialog box (Figure 1). If your office regularly closes out each month, the **Close Out Month** date will reflect the month that has just ended (for example, 12/2010).

If you want to delete old appointments in the Appointment Book at this time to reduce the size of your practice database, you can select **Appointment Purge**. All appointments dated prior to the **Cutoff Date** will be deleted from the Appointment Book. (The default cutoff date is one year before the month you are closing.) If you do not want to purge appointments, do not select this option.

Figure 1 This dialog box in the Ledger helps you close out each month.

To keep insurance benefits and deductibles renewed and up-to-date as you close out the year, select the **Reset Insurance Benefits** option. We recommend you do this each month to ensure that future insurance estimates are calculated correctly.

Click **OK**. Dentrix closes the month, then checks the fiscal year beginning month and calculates the yearly totals accordingly.

HANDLING CLAIMS CREATED IN ONE YEAR, BUT RECEIVED DURING THE FOLLOWING YEAR

After you close the fiscal year, Dentrix detects all pending claims created during the previous year. All payments posted to claims from the previous year are automatically applied to the previous year's benefits unless you make an adjustment in the **Total Insurance Payment** dialog box (Figure 2). (This might be needed for a write-off or refund adjustment after receiving payment from the insurance company. This is a new feature that was added in Productivity Pack 8. For more information on using write-off and refund adjustments, see "Adjusting insurance payments automatically" and "Posting refund adjustments automatically" in the Dentrix Help.)

YEAR END REPORTS

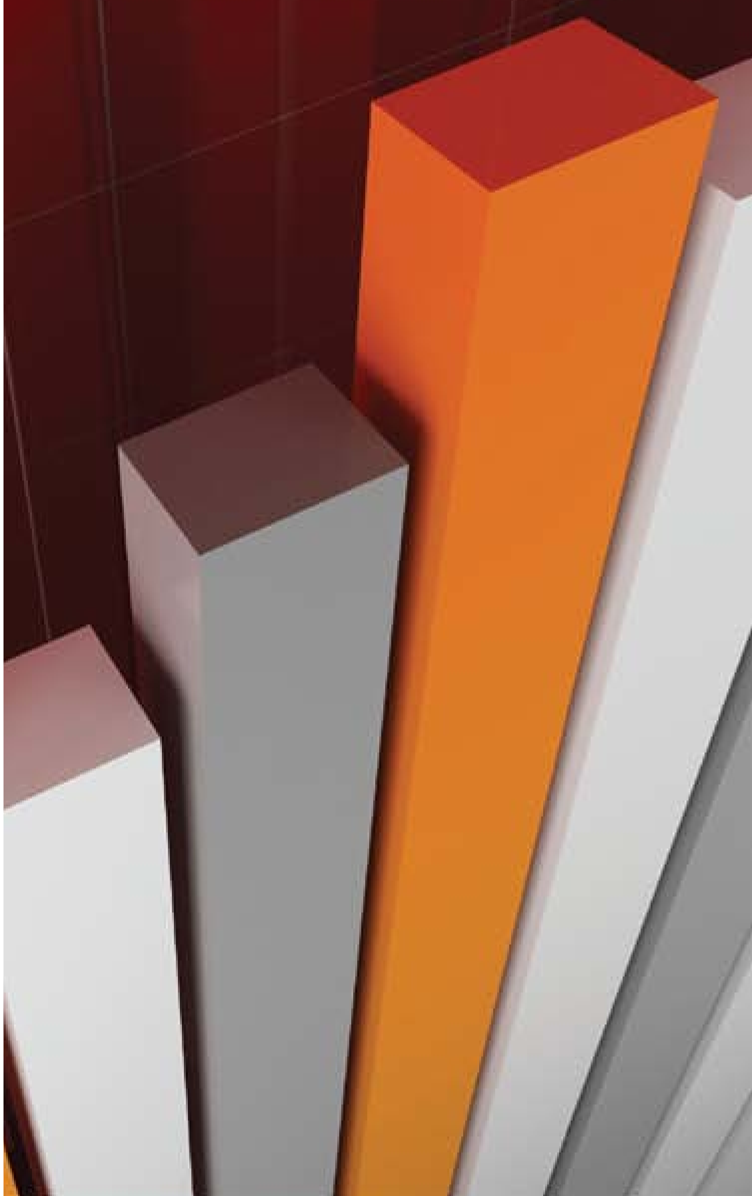
The Dentrix Office Manager has several reports that can help you at year end. The following is a list and brief description of some reports that give you helpful year-end information:

• **Practice Advisor Report.** With this report, you can assess the overall financial health of your practice with month-to-date and year-to-date statistics for collections, continuing care, new patients, production, and schedule management. The Practice Advisor shows you where you have reached or exceeded goals and where improvements need to be made. This report provides statistics for the practice as a whole and for each dentist and hygienist. Taking the recommendations provided in the report, you can use the other year-end reports (described below) to look at details regarding those shortfalls. To run this report, in the Office Manager, from the **Analysis** menu, click **Practice Advisor** to open the **Practice Advisor** dialog box, and then click **Practice Advisor Report**.

• **Analysis Summary Report.** This report lists charges, payments, and adjustments. You can use this report to generate totals for a specified date range or daily totals. You can also generate a detailed summary that includes MTD and YTD totals for each provider. To run this report, from the **Reports** menu, point to **Management**, and then click **Analysis Summary**.

• **Practice Analysis Report.** This report provides statistical data for production, receivables, patients, and financial contracts (payment agreements and future due payment plans). The report lists this data for the current day, month, year, and past three months. You can only generate this report by Entry Date (the date a transaction or procedure was entered into the computer). You can rearrange the columns on this report to suit the needs of your office by clicking **Setup > Analysis**. To run this report, from the **Analysis** menu, click **Practice**. Then from the **File** menu, click **Print Analysis.**

Closing the year is an opportunity to purge old Appointment Book data, keep insurance benefits and deductibles up-to-date, and review helpful year-end information from several Dentrix reports.



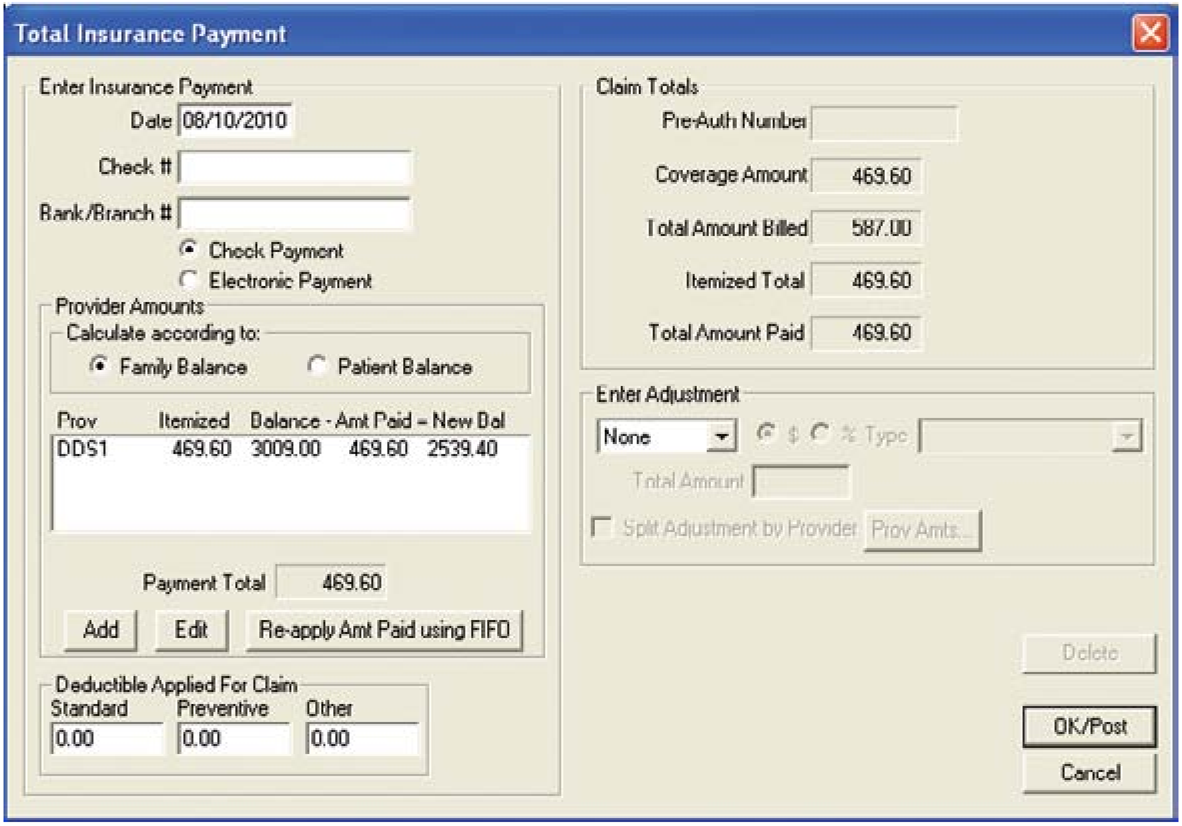


Figure 2
You can make payment adjustments in the Total Insurance Payment dialog box.

• **Production Summary Report.** This report allows you to generate a detailed list showing the total number of times you completed each procedure in the specified date range and the average charge for each procedure. The report groups the procedures by categories, such as **Diagnostic, Preventive**, and so forth. To run this report, from the **Analysis** menu, click **Practice**, and then click the **Reports** menu. Clear all options under **Select Summary Reports** except **Production Summary**. Leave the **By Category** option selected for a more generic report.

• **Adjustment Summary Report.** This report provides detailed information such as the number of times each adjustment type was used and the total amount adjusted off during the selected date range. To run this report, from the **Analysis** menu, click **Practice**, and then click the **Reports** menu.

• **Payment Summary Report.** This report is similar to the Adjustment Summary Report in that it provides a detailed summary of payments received. These may include Cash Payment, Credit Card Payment, and so forth. To run this report, from the **Analysis** menu, click **Practice**, and then click the **Reports** menu.

• **Patient Summary Report.** This is a demographic report that shows the total number of current patients. The report data is broken down by gender, age, insured, non-insured, and so forth. To run this report, from the **Analysis** menu, click **Practice**, then click the **Reports** menu.

• **Aging Report and an Insurance Aging Report.** Many offices also find it useful to print these two reports at the end of each month and year. To run these reports, from the **Reports** menu, point to **Ledger**, then click the name of the report.

• **Family Ledger Report.** Patients often request a printout of their Ledger for the previous year. To print a Family Ledger Report, in Office Manager, from the **Reports** menu, point to **Ledger**, and then click **Family Ledger Report**. Select the guarantor for the desired family. The First Transaction Date should be modified to show the first day of the year (1/1/2010) and the Report Date (at the top) should be the last day of the year (12/31/10). A Family Ledger Report can also be printed directly from the Ledger, but it is not possible to specify a date range there.

Note: These are the same reports that are recommended for month-end. After you run these reports for the last month of your fiscal year, you will run these reports for the entire year (with the exception of the Practice Advisor Report).

Following the recommendations in this article will help simplify the work of closing the year and save you some time to enjoy the holidays. Happy New Year!

Learn More

To learn more about closing the year, see the following topics in the Dentrix Help: Running the month-end update, Running the Month End Wizard, Backing up the Dentrix database. You can also visit the Dentrix Resource Center to view the Year End Processes webinar recording, read articles #15244 and # 35525 in the knowledgebase, or download a copy of the Dentrix G4 Reports Reference. See “How to Learn More” on page 7 for instructions on accessing these resources.

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