Using Systems to Create the Perfect Paperless Office

William J. Moorhead, DMD
Florida National Dental Conference
June 2014

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Disclosure Statement:

I have a relationship with the following company that may be relevant to this course:

Owner: The Streamlined Practice LLC
StreamDent.com
StreamDent.net
Participants should be cautioned about the potential risks of using limited knowledge when integrating new techniques in their practice

ADA CERP Standard IX

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Downloads:
www.TheStreamlinedPractice.com
Today’s Objectives

- Recognize the time and money-saving advantages of the paperless office
- Make practical use of *your* latest software
- Learn ready to use systems to plug into your practice
- Acquire nuts and bolts techniques to take your office paperless
My Paperless Evolution

1981: Sycom Off-Premise System
   Off-site computers prepared statements, insurance forms and reports

1986: Apple 2e Computer. Recall database and Word Processor mail merge on AppleWorks software

1987: K-Comp PC-MOS system with 25 Mb hard drive
   - Clinical notes typed on word processor


July 2000: Dentrix installed for front office

January 2001:
   - Operatory computers
   - All charting, perio and clinical notes entirely digital
My Paperless Evolution

- 2002: Invisalign

- 2003:
  - First dedicated desktop server
  - Caesy Enterprise video server

- 2006:
  - Dexis intra-oral
  - Dedicated rack server
  - Paper charts eliminated, panoramic x-rays scanned

My Paperless Evolution

- 2008: New Office
My Paperless Evolution

- 2008: New Office
My Paperless Evolution

• 2008: New Office
My Paperless Evolution

- **2008:** Sheet-fed scanner, paper receipts now stored electronically

- **2009:**
  - Eliminated all printed reports
    - Daily reports
    - Daily deposit records
    - EOM

- **2010:**
  - Apple X-Serve for StreamDent®
  - 3 Mb Internet service
My Paperless Evolution

2011: Three PC Virtual Servers

Today’s Topics

• Evaluate paperless features in the three major practice management software vendors plus two new cloud software services
• Discuss hardware demands and software versions
• How to streamline your operatory for all digital records
• Protecting yourself from data loss
• Methods and management of paperless data entry
Today’s Topics

- Electronic insurance claims
- HIPAA Privacy and Security Rules
- Electronic health records & Medicaid reimbursement incentives
- Add-ons available to Practice Management Software
- Cloud software available
- Review the flow necessary to perform a new patient exam in a paperless office
Take the Stairs – 7 Steps to Achieving True Success
Rory Vaden

The Pain Paradox Principle of Sacrifice
Take the Stairs – 7 Steps to Achieving True Success
Rory Vaden

Cows run away from the storm

The Pain Paradox Principle of Sacrifice

Impulse
Feelings
Emotion
The short term easy leads to the long term difficult, while the short term difficult leads to the long term easy.
Take the Stairs – 7 Steps to Achieving True Success

Rory Vaden

The Pain Paradox Principle of Sacrifice

EASY short-term choices lead to DIFFICULT long term consequences.
Take the Stairs – 7 Steps to Achieving True Success
Rory Vaden

The Pain Paradox Principle of Sacrifice

The short term easy leads to the long term difficult, while the short term difficult leads to the long term easy.

Self discipline creates freedom.

Overview: Practice Management Software

<table>
<thead>
<tr>
<th></th>
<th>Dentrix</th>
<th>Eaglesoft</th>
<th>Sofdent</th>
<th>Curve</th>
<th>QSI Dental</th>
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<td>Electronic Insur Claims</td>
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<td>Clinical Notes</td>
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<td>“AutoNotes” – Basic</td>
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<td>“Smart Note” Templates</td>
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<td>Questionnaires</td>
<td>Advanced</td>
<td>Customizable Next Year</td>
<td>Customizable</td>
<td>Available This Month</td>
<td>Advanced</td>
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<td>Customizable</td>
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<tr>
<td>EHR</td>
<td>☒ Add-on</td>
<td>Late 2012</td>
<td>Late 2012</td>
<td>Not Available</td>
<td>☒ Fully Integrated</td>
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</table>
Reality Check: Age of Your Hardware

- Useful life:
  - Desktops: 3 years
  - Servers: 5 years
- Breakdowns = Operatory Shut Down

Software Versions

- Capability & Compatibility
  - Software capability improves but require faster computers
- Maintenance & Bug Fixes
  - Without maintenance – risk of security breaches
- Cloud-based
  - Increasingly used by newer software
  - Little or no maintenance
  - Upgrades automatic
Infrastructure

- Network cabling
  - Cat5: Minimum
  - Cat6: VoIP
- Wireless routers
  - Intra-office network
  - Internet access only – for patient use
- Internet access:
  - Cable, DSL, T1 lines or faster
  - Download/upload speeds (5 Mb/1 Mb, 10 Mb/2 Mb)

Planned obsolescence

- Budget to replace hardware & software on a regular schedule
Monitors

More monitor space = increased productivity

- Number & Size
- iPads, other tablet computers
Monitors
Monitors
Utilities for Multiple Monitors

- Ultramon


Monitors
Monitors

iPads

Keyboard & Mouse

- Cabling for USB, USB hubs
  - Lasts about 3 years
  - Try to add large width PVC under operatory flooring
Keyboard & Mouse

- Cabling for USB, USB hubs
  - Lasts about 3 years
  - Try to add large width PVC under operatory flooring
- Wireless
  - Have become reliable
  - Battery changes
  - Still some potential for wireless interference

Data Backups

- Tape drives
- USB portable drives
  - Keep at least one current backup
  - Portable drives should be encrypted
- Laptop copy
  - Your laptop hard drive should be encrypted
Data Backups

- Tape drives
- USB portable drives
  - Keep at least one current backup offsite
  - Portable drives should be encrypted
- Laptop copy
  - Your laptop hard drive should also be encrypted
- Offsite backups

Backups

- Tape drives
- USB portable drives
- Laptop copy
- Offsite backups

<table>
<thead>
<tr>
<th>Service</th>
<th>Cost/Subscription plan</th>
<th>Number of Computers included</th>
<th>Storage (GB)</th>
<th>Backup Applications Included</th>
<th>Backup Method(s) Required</th>
<th>Additional Hardware Required</th>
<th>Backup Frequency</th>
<th>Cost/Year</th>
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</thead>
<tbody>
<tr>
<td>CARBONITE</td>
<td>$10, 999, or $540 per year</td>
<td>One</td>
<td>Unlimited</td>
<td>500GB plans only; external drive required</td>
<td>500GB and 1TB plans only; external drive required</td>
<td>500GB and 1TB plans only; limited to one external drive</td>
<td>1GB per month</td>
<td>$125 to $305</td>
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<tr>
<td>CASPLAN</td>
<td>$32, 320, or $520 per year</td>
<td>One to three</td>
<td>1TB for unlimited</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>1GB per month</td>
<td>$150 to $310</td>
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<tr>
<td>mozy</td>
<td>$52 to $90 per month</td>
<td>One to three</td>
<td>500GB to 1250GB</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>1GB per month</td>
<td>$30 to $540</td>
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</tbody>
</table>

Offsite backups

- Keep at least one current backup offsite
- Portable drives should be encrypted
- Laptop copy
- Your laptop hard drive should also be encrypted
Scanning

- Flatbed vs. Sheet fed
- X-ray Scanners
- Higher resolution = More Hard Drive Capacity
- Twain interface required for most dental software
Scanning

Epson Expression 1640 XL
$499

Transparency Unit
$449 for 1640XL

- Allows scan of panoramic or cephalometric films
Scanning

$353
Not TWAIN Compatible

Scanning

$784
TWAIN Compatible
Why Scan?

- If you are still generating paper forms
- Hard copy documents received by mail
  - Transferred records, mailed EOBs
- Convert existing charts

Conversion Strategies

- Don’t scan everything!
  - You’ll occasionally need the old paper chart, but their need decreases over time
  - Strategy Session – Action Plan
Conversion Strategies

- Set a “drop dead” date for eliminating paper charts
- Give yourself adequate time – Perhaps 6 months
  - During this six months, create a digital chart and pull the paper chart.
- Review progress monthly on implementation
- After the “drop dead” day, pull charts as patients make appointments and move them to storage
- Keep the charts on site, if possible, in case they need to be accessed.
- Find ways to switch incoming paper forms to electronic:
  - Electronic EOBs
  - Fax: [www.MyFax.com](http://www.MyFax.com)

Printing Direct to PDF

<table>
<thead>
<tr>
<th>2012 Best Convert PDF Software Comparisons and Reviews</th>
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</thead>
<tbody>
<tr>
<td>Task</td>
</tr>
<tr>
<td>------</td>
</tr>
<tr>
<td>Review Comments</td>
</tr>
<tr>
<td>Lowest Price</td>
</tr>
</tbody>
</table>

Ratings:
- [Rating System](http://www.rating.com)
Printing direct to PDF

Digital Radiography
- Extra-oral: Panoramic, Ceph, CBCT
- Intra-oral:
  - Sensors vs. Phosphor Plates
  - Sensor sizes
- Software ease of use
- Database design (SQL)
Digital Photography

- Intra-oral cameras vs. Digital cameras
  - Intra-oral:
    - Quick
    - Limited field of vision
  - Digital camera:
    - Image size – disk storage space, speed of loading
Digital Photography

- Photos
  - Take face photo first, have fun. It should be a flattering picture that could later be used with Before & After photos.
  - Take mirror shots last, explain to patient how they will help in advance.
  - Note any teeth in bad shape, get PA x-rays of those teeth when in x-ray area.

<table>
<thead>
<tr>
<th>Taken</th>
<th>Proofed</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Full face with smile (flattering)</td>
</tr>
<tr>
<td></td>
<td>Smile closeup - saying “nee”</td>
</tr>
<tr>
<td></td>
<td>Anterior retracted - open</td>
</tr>
<tr>
<td></td>
<td>Anterior retracted - closed</td>
</tr>
<tr>
<td></td>
<td>Maxillary occlusal - with occlusal mirror</td>
</tr>
<tr>
<td></td>
<td>Mandibular occlusal - with occlusal mirror</td>
</tr>
</tbody>
</table>

- Canon 60D photo settings:
  - Intra-oral: C
  - Smile: AV F12 - F20
  - Full Face: AV F2.8 - F11

- Take digital camera card to front office to download and crop photos.

Digital Cameras
- Norman Camera: [www.normancamera.com](http://www.normancamera.com)
- Photomed: [www.photomed.net](http://www.photomed.net)
- Lester Dine: [www.dinecorp.com](http://www.dinecorp.com)
Retractors

Plastic retractors – GAC or Great Lakes Ortho
Metal retractors – Columbia Retractor – Salvin Dental
Fifth hand cheek retractor – Danville Materials
Optragate

Mirrors:

Riofoto mirrors: [www.riofoto.com](http://www.riofoto.com)
Mirrors:

Universal Mirror Handle: PhotoMed

Contrastors:

PhotoMed
Eye-Fi Card

- Wireless router required

DrQuickLook™ Dental Viewer

www.drquicklook.com

$895
Paperless Questionnaires

Softdent
Using Systems to Create the Perfect Paperless Office

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Dentrix

Medical History Follow-Up Questions

Allergies
Arthritis
Asthma/Chest Pain
Artificial Prosthesis
Asthma

How severe are your asthma? What causes them?
What did your recent medication do you take routinely?
What do you to increase your asthma control? Have offered to your doctor to your advice?

Autoimmune Disorder
Blood sugar levels
Cancer

Diabetes

What medications do you take Type 1 diabetes insulin or oral medication? Type 2 diabetes insulin or oral medication? Please explain your insulin or oral medication? What is your A1C number? What is your current blood glucose level?

Epilepsy/Seizure
Heart Disease
Hypertension
Hypothyroidism

Other:
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Cloud-based Prescription Software

- www.lexi.com
- Online & mobile versions available
- Comprehensive drug database
- Drug Interactions
- Resource library
- Optional electronic prescribing
- Cost $299-499/year
Dental Specific Drug Information
Dental specific pharmacology content

Dental Specific Drug Information
Drug interaction screening
Lesion Diagnostic Decision Support

Help reduce diagnostic errors and improve patient outcomes
Dental ePrescribing

Lexicomp® Online for Dentistry™ allows you to send prescriptions directly to the pharmacy.

Dental ePrescribing
Electronic Prescribing (ePrescribing) is a safe & efficient alternative to paper Rx's and pharmacy phone calls.

1. Add patient to DixieScript
2. View patient's medication history and leave from insurance companies and pharmacies
3. Select patient's preferred pharmacy and send the prescription
4. Patient picks up prescription at pharmacy
5. Automatically run drug to drug and drug-to-food interactions

Paperless Questionnaires
Add-on available

- If your Practice Management Software doesn’t give you the features you’re looking for:
  - MedicTalk Dentforms
  - $2500-3500
Dentforms

[Dentforms software screenshot]

[Dentforms software screenshot]
Dentforms - Integration

DentForms

www.MedicTalk.com

$2500-3500
Another Alternative:

- Talario X-paper

www.talario.com

Another Alternative:

- Talario X-paper

www.talario.com
Signing Digital Forms

- Digital questionnaires and consent forms can be signed with electronic signature pads
Using Systems to Create the Perfect Paperless Office

Diagnodent Readings with Diagnosis

<table>
<thead>
<tr>
<th>Tooth</th>
<th>Diagnos</th>
<th>Treatment Plan</th>
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<tbody>
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<td>7</td>
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</tbody>
</table>

NP: Y N Opt: 1 2 3 4 5 6 7 | Exam: Comp NFP NCCV
Hyg: TIME LEFT: PCCV
XRAYS TODAY: FMX BW PAN PA*
APPREHENSIVE: ☐ Yes ☐ No ☐ Possibly
EUG List: Home Care: Other:

RECOMMENDED TREATMENT

URGENT
REQUIRED
IDEAL

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Web-based &/or Kiosk-based Questionnaires

- Already added to most Practice Management Software
  - Dentrix – fully customizable
  - Eaglesoft – will be able to customize next year
  - Softdent – customizable
  - Curve – available this month
  - QSIDental – fully customizable

- Usually requires an extra monthly charge
- Minor programming to add to your website
- Can save chair time if used properly
- https feature will time out

Cloud Based Practice Management Systems

- No server
- Any operating system
Curve Dental

- [www.CurveDental.com](http://www.CurveDental.com)
- Includes Patient Education Software
- Can use all x-ray sensors except Dexis
- Cost $197/month basic, $97/month imaging

Curve Dental
QSI Dental™ Web

- [www.qsii.com](http://www.qsii.com)
- For larger offices, multiple locations, multi-specialties
- Cost $55 - 75/user

Clinical Notes
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FNDC June 2014
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Easy Notes Pro2

Using Systems to Create the Perfect Paperless Office

FNDC June 2014
© The Streamlined Practice 2014
Easy Notes Pro2

Easy Notes Pro2
Dedicated Prescription Printer

Southland Printing, Lexington, KY 859-276-1965
Save a Screen Shot
Save a Screen Shot

- Manual operation in Windows 7 or Vista:
  - Snipping Tool

Automatic:
- Capture Express
  - Single copy: $19.95
  - 2 Users: $35
  - 5 Users: $75
  - 10 Users: $144

- TechSmith SnagIt 9
  - Single copy: $19.95
  - 5-9 Users: $38
  - 10-24 Users: $25

www.CaptureExpress.com
www.TechSmith.com
Electronic Insurance Claims

- NEA – www.nea-fast.com
- Tesia Bridge – www.tesiacom

- Real-time claim processing
- Real-time pre-authorizations
- Attachments
- Eligibility requests

Case Presentation Software

- Caesy – Patterson Dental – Network & Cloud versions
  www.Caesy.com
  www.CaesyCloud.com - $59/month – up to 5 users
- DDS GP for iPad – www.ddsgp.com - $399
- Curve Dental – included in Cloud Software package

Some of these services will allow you to send copies of the videos to your patients at home.
Secure Electronic Communication

- HIPAA Issues
  
  *Electronic Health Records (EHR) will hopefully eliminate these problems over time.*

- Email encryption:
  - Requires receiver to have a digital key to unlock the email

- Secure Sites:
  - Dentform software:
    - Uploads the form securely to their server
    - You email a link to the document
  
  - RecordLinc:  [www.RecordLinc.com](http://www.RecordLinc.com)
Communicating with Other Offices

Dr. Horn

Use workspaces to store and share your files.

This workspace is currently empty. Here are 4 ways you can add files to it:

- Upload a file from your desktop by choosing "upload from the menu bar above.
- Drag and drop files from other Acrobat.com workspaces or folders.
- Select "New" from the menu bar and create a new Document, Presentation, or Table.
- Move a selected file into this workspace using the "Share" file menu.

Communicating with Other Offices

Share "Jenkins & Morrow"

People to share the workspace with:
- jenkinsandmorrow.com
- finnancialservices.com
- appl.com
- thefirma.com

Subject

B.J. Jenkins has shared a workspace with you.

Message:

This website allows us to view and protect documents and forth to comply with HIPAA Privacy regulations.
Communicating with Your Lab

- Some Practice Management Software has modules for tracking lab cases.
  - They want the labs to buy their software to communicate with their clients.
- You'll need a computer in your lab
- There are paperless forms available through 3rd party vendors for Lab Rxs
  - EZ Notes Pro – fully customizable
  - Dentforms
  - StreamDent
- The same HIPAA regulations apply when transmitting electronic documents
Electronic Health Records (EHR)

- EHR must be “interoperable:”
  - Your electronic data must be compatible with other EHR systems

Electronic Health Records (EHR)

- Benefits to EHRs:
  - Make patient’s health information available when and where it is needed – improved safety
  - Bring patient’s total health information together in one place where it will always be current
  - Improved convenience:
    - Have prescriptions ordered and ready before patient leaves
    - Insurance claims filed immediately
  - Automatically check for and alert the clinician of potential drug contraindications whenever a new medication is prescribed
Electronic Health Records (EHR)

- When are EHRs “required?”

Starting in 2015, Medicare intends to reduce reimbursements to Medicare providers who do not implement “meaningful use” of EHRs.
Electronic Health Records (EHR)

- Only one integrated solution available for dentistry yet
- Medical office examples
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Medicaid Incentives

- 2009: HITECH (Health Information and Technology for Economic and Clinical health Act) passed by Congress.
- Goal: Kick-start a nationwide movement toward implementation of Electronic Health Records (EHR)
Medicaid Incentives

- The “Meaningful Use” final rule stipulates that in order to qualify to receive incentives from the Medicaid EHR Incentive program a health care provider must use a certified EHR and serve at minimum **30 percent Medicaid patients**. Patient encounters are calculated using any continuous 90-day period from the previous calendar year.

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**Medicaid Incentives**

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Other “Paperless” Communication

- Radios
  - Kenwood ProTalk XLS Radio
    - $168/each
    - www.KiscoDental.com

Other “Paperless” Communication

- Whiteboards
Other "Paperless" Communication

- Whiteboards
Other "Paperless" Communication

- Whiteboards

Other "Paperless" Communication

- Whiteboards
Other “Paperless” Communication

- Digital Whiteboards
  - Blue Note Communicator
    - $695
VoIP: WeaveDental

- www.GetWeave.com
VoIP: WeaveDental

Task List

VoIP: WeaveDental

Call Log
VolIP: WeaveDental
Texting

Atul Gawande, MD
Atul Gawande, MD

“All learned occupations have a definition of professionalism, a code of conduct. It is where they spell out their ideals and duties. The codes are sometimes stated, sometimes just understood. But they all have at least three common elements.”

1) An expectation of selflessness – that we accept responsibility for others
2) An expectation of skill – that we aim for excellent in our knowledge and expertise
3) An expectation of trustworthiness”

Atul Gawande, MD

“Aviators, however, add a fourth expectation: DISCIPLINE. Discipline in following product procedure and in functioning with others. This is a concept almost entirely outside the lexicon of most professions.

In medicine, we hold up “autonomy” as a professional lodestar, a principle that stands in direct opposition to discipline.”
Atul Gawande, MD

“Discipline is hard – harder than trustworthiness and skill and perhaps even than selflessness. We are by nature flawed and inconstant creatures... That is why aviation has required institutions to make discipline a norm.”

Atul Gawande, MD

“To be sure, checklists must not become ossified mandates that hinder rather than help. Even the simplest requires frequent revisiting and ongoing refinement. In the end, a checklist is only an aid. If it doesn’t aid, it’s not right. But if it does, we must be ready to embrace the possibility.”
Atul Gawande, MD

“We are all plagued by failures – by missed subtleties, overlooked knowledge, and outright errors. When we look closely, we recognize the same balls being dropped over and over, by those of great ability and determination. We know the patterns, we see the costs. It’s time to try something else.

Try a checklist.”

Protocols & Systems

The New Patient Process

1. Patient fills out their forms online or using an iPad
2. Receptionist notifies the assistant by radio
3. Patient questionnaire is opened in the operatory before the patient is brought back
4. Patient is greeted by the assistant
5. Office tour (scripted)
Protocols & Systems

The New Patient Process

1. Patient fills out their forms online or using an iPad
2. Receptionist notifies the assistant by radio
3. Patient questionnaire is opened in the operatory before the patient is brought back
4. Patient is greeted by the assistant
5. Office tour (scripted)
6. Review medical and dental history questionnaire
The New Patient Process

1. Patient fills out their forms online or using an iPad
2. Receptionist notifies the assistant by radio
3. Patient questionnaire is opened in the operatory before the patient is brought back
4. Patient is greeted by the assistant
5. Office tour (scripted)
6. Review medical and dental history questionnaire
   - Summary sections are prepared for quick doctor review and easy copy/paste to clinical notes
Using Systems to Create the Perfect Paperless Office

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Protocols & Systems
The New Patient Process

7. BP with Omron BP Cuff or Criticare Pulseoximeter
8. Digital photos or intraoral camera
9. Diagnodent

Photos
- Take face photo first, have fun. It should be a flattering picture that could later be used with Before & After photos
- Take mirror photos last, explain to patient how they will help in advance
- Note any teeth in bad shape, get x-rays of those teeth when in x-ray area

<table>
<thead>
<tr>
<th>Taken</th>
<th>Proofed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Full face with smile (flattering)</td>
</tr>
<tr>
<td></td>
<td>Smile closeup - saying &quot;nee&quot;</td>
</tr>
<tr>
<td></td>
<td>Anterior retracted - open</td>
</tr>
<tr>
<td></td>
<td>Anterior retracted - closed</td>
</tr>
<tr>
<td></td>
<td>Maxillary occlusal - with occlusal mirror</td>
</tr>
<tr>
<td></td>
<td>Mandibular occlusal - with occlusal mirror</td>
</tr>
</tbody>
</table>

Canon 60D photo settings:
- Intra-oral: C
- Smile: AV F12 - F20
- Full Face: AV F2.8 - F11

Take digital camera card to front office to download and crop photos
**Protocols & Systems**

### The New Patient Process

1. BP with Omron BP Cuff or Criticare Pulseoximeter
2. Digital photos or intraoral camera
3. Diagnodent
4. Preliminary scripts based on obvious findings
   - Leading questions
5. Digital charting (existing) & Perio Probing (hygienist)
6. Doctor reviews health history, performs brief exam, orders radiographs
13. Assistant shows patient their photographs & x-rays before doctor returns – and discusses obvious findings
14. Doctor returns, assistant gives hand-off
Protocols & Systems

The New Patient Process

13. X-ray “discovery” by assistant before doctor returns – discuss obvious findings
14. Doctor returns, assistant gives hand-off
15. Doctor dictates findings – assistant makes notes on a paper form
Protocols & Systems

The New Patient Process

13. X-ray “discovery” by assistant before doctor returns – discuss obvious findings
14. Doctor returns, assistant gives hand-off
15. Doctor dictates findings – assistant makes notes on a paper form
   - Findings on the paper form are converted to a digital table for clinical notes after the patient leaves

<table>
<thead>
<tr>
<th>Tooth</th>
<th>Area</th>
<th>Reading</th>
<th>Diagnosis</th>
<th>Treatment Plan</th>
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<tr>
<td>1</td>
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<td>m ph</td>
<td></td>
<td></td>
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<tr>
<td>1</td>
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Protocols & Systems

The New Patient Process

13. X-ray “discovery” by assistant before doctor returns – discuss obvious findings
14. Doctor returns, assistant gives hand-off
15. Doctor dictates findings – assistant makes notes on a paper form
   • Findings on the paper form are converted to a digital table for clinical notes after the patient leaves
16. Patient is shown videos
17. Handouts are printed or emailed to patient

18. Financial arrangements
Protocols & Systems

The New Patient Process

18. Financial arrangements
19. Next appointment’s treatment plan is clearly marked in the digital chart
20. Any Rxs are printed and reviewed
21. Assistant enters procedure codes today’s charges
22. Assistant walks patient to front desk and gives handoff
23. Assistant types clinical notes
24. Doctor reviews and finalizes clinical notes at end of morning and end of afternoon.
Using Systems to Create the Perfect Paperless Office

FNDC June 2014
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Protocols & Systems

The New Patient Process

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Covey's Time Management Matrix

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<tr>
<td>Urgent</td>
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</tr>
<tr>
<td>I</td>
<td>II</td>
</tr>
<tr>
<td>III</td>
<td>IV</td>
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<td>I</td>
<td>II</td>
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<tr>
<td>Deadline-driven activities</td>
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<td>Crises</td>
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<td></td>
</tr>
<tr>
<td>Last minute preparations</td>
<td></td>
</tr>
<tr>
<td>III</td>
<td>IV</td>
</tr>
<tr>
<td>Not Important</td>
<td></td>
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<td></td>
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</tr>
<tr>
<td>Relationship building</td>
<td></td>
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<tr>
<td>Personal development</td>
<td></td>
</tr>
<tr>
<td>Employee training</td>
<td></td>
</tr>
<tr>
<td>Exercise and health</td>
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<td>Prevention and planning</td>
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</tr>
<tr>
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</tr>
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<tr>
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<tr>
<td>II</td>
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</tr>
<tr>
<td>Not Important</td>
<td>Some emails and phone calls</td>
<td>Relationship building</td>
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<td>Many interruptions</td>
<td>Personal development</td>
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<tr>
<td></td>
<td>Some popular activities</td>
<td>Employee training</td>
</tr>
<tr>
<td></td>
<td>Some meetings</td>
<td>Exercise and health</td>
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<tr>
<td></td>
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<td>Prevention and planning</td>
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<tbody>
<tr>
<td>III</td>
<td>Trivia</td>
<td>IV</td>
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<tr>
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<td>Some emails and phone calls</td>
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<td>Excessive TV</td>
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<td>Some popular activities</td>
<td>Time wasters</td>
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<tr>
<td></td>
<td>Some meetings</td>
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<tbody>
<tr>
<td>Important</td>
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<td>II</td>
</tr>
<tr>
<td>Necessity</td>
<td>Quality &amp; Personal Leadership</td>
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<tr>
<td>Key Action</td>
<td>MANAGE</td>
<td>FOCUS</td>
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<tr>
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<td>III</td>
<td>IV</td>
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<tr>
<td>Deception</td>
<td>Waste</td>
<td>Key Action: AVOID</td>
</tr>
<tr>
<td>Key Action</td>
<td>Use Caution or Avoid</td>
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</table>

## Time Matrix in the Dental Office

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<thead>
<tr>
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<th>Urgent</th>
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</thead>
<tbody>
<tr>
<td>Important</td>
<td>I</td>
<td>II</td>
</tr>
<tr>
<td>Deadlines</td>
<td>Employee training</td>
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<tr>
<td>Crises</td>
<td>Planning Systems</td>
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<td>Pressing problems</td>
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<td>Emergencies</td>
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<td>III</td>
<td>IV</td>
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<tr>
<td>Some emails and phone calls</td>
<td>Trivia</td>
<td></td>
</tr>
<tr>
<td>Many interruptions</td>
<td>Personal phone calls</td>
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<td>Time wasters</td>
<td>Surfing the internet</td>
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<td>Junk mail</td>
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</tr>
<tr>
<td>Time wasters</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Take the Stairs – 7 Steps to Achieving True Success
Rory Vaden

The Pain Paradox Principle of Sacrifice

Subconscious Procrastination
Creative avoidance
Daily acts of trivia
Take the Stairs – 7 Steps to Achieving True Success
Rory Vaden

The Pain Paradox Principle of Sacrifice

“Procrastination is one of the most expensive invisible costs in business today.”

Success Means Doing Things We Sometimes Don’t Want To Do
Kentucky Meeting  
Friday, March 8  

Streamlined Success  
How to Run a Highly Efficient, Highly Profitable Dental Practice  

Course Objectives:  
- Understanding “Systems”  
- How to get your team on board  
- How to set goals you can actually achieve  
- Communicating what you want  
- How to deal with system failures  
- What truly impacts the bottom line?  
- How to avoid being tired and frustrated at the end of the day  
- How not to worry and when worrying is a good thing
Using Systems to Create the Perfect Paperless Office

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