



Your Guide to Choosing Dental Software

eBook Series

CLEAR DENT

Your Guide to Choosing Dental Software

eBook Series

Whether you're looking for your first dental software or you're looking to switch to a new one that's better suited for your business, **choosing a software provider is never easy.**

These days, a mark of a modern dental practice is one that has **gone paperless**. From increased productivity for your whole team to improved operational efficiency to **better patient care**, the right paperless dental software will help you grow your business.

Software is a key factor in the overall success of your practice so you need to ask the right questions and consider a variety of factors from cost to security to ease of use when choosing the right solution.

Your Guide to Choosing Dental Software helps guide you through the process of researching, evaluating, and ultimately choosing a software provider for your dental practice. This eBook will give you important factors to keep in mind, delve into a list of exactly what features to look out for during your research, provide tips on evaluating your options, and list the best dental software in Canada to help you get started.

Table of Contents

Chapter 1

Paperless practices

Chapter 2

Factors to consider

Chapter 3

Tips for evaluating

Chapter 4

Best dental software



Chapter 01

The future of dentistry

Paperless practices

Cost

Naturally, the first thing you are likely thinking about is the cost. You want to make sure you're not paying exorbitant fees and that you get the most value out of your money.

However, one thing to keep in mind is that cost is only one piece of the pie. While you should look for a solution within a realistic budget, it's important to note that you're looking for the software that will give you the highest return on investment rather than simply the cheapest option.

While a dental software may seem like an increased cost upfront, a good solution will offer you benefits in the long run, such as increased productivity, higher [patient retention](#), happier employees, peace of mind with security, and reduced IT costs. You should also look for providers that offer free and automatic updates, making software a long-term investment for your practice that doesn't depreciate over time.

Integration

Consider a solution that either has or can [integrate](#) with what your practice needs. Rather than using several silo-ed programs to run your practice, a central solution will increase your efficiency, revenue, and patient satisfaction.

If you have to use another program for something like patient communication or dental imaging, make sure the program is compatible with your software. If not, you then have the tedious task of using several different solutions that don't speak to each other in order to run your practice, disrupting your workflow.

A central practice management system that fully integrates with the other tools you need to run your practice means you:

- Can access patient information and practice data quickly and easily
- Can work on a patient's file at the same time as other team members
- Cut down on errors and manual entry
- Can easily switch back and forth between tasks without disruption
- Ultimately provide a better patient experience



Security

Security should be top of mind for you when you consider your software options because a patient data breach can do a lot of harm to your practice. Not only do you need to assure your patients that their data is safe and secure, there are strict privacy laws, such as [PIPEDA](#) (Personal Information Protection and Electronic Documents Act), in place to ensure you do so.

More and more dental practices and other healthcare businesses are being targeted by cybercriminals:

- The healthcare industry accounts for [43% of all data security breaches](#)
- Since September **2009**, almost [21,000,000 health records have been compromised](#)
- [47% of cyber attacks target small businesses](#) like dental practices

Many hackers target smaller dental offices because they think small businesses don't have the proper security software or firewalls in place. Your dental practice is a wealth of patient data. Stolen patient data can be sold on the DarkWeb, resulting in identity theft, fraud, blackmail, and other criminal activities. Hackers may deny you access to the data they stole through ransomware and extort your practice for money. If your data is not secure and there is a breach, the consequences may be irreparable.

The consequences to your dental practice include not only time and money spent on crisis management and data recovery, but also potential lawsuits from patients, damage to reputation, and loss of important patient information. In the end, you are ultimately on the line for any potential data breaches.

Consider some of the major breaches that have affected Canadians over the last few years: [Bell Canada](#), [Equifax](#), and [Uber](#). The exposure of personal customer information cost them brand reputation, financial losses, and customer trust.

So all of this means your software needs to help ensure that you are adhering to PIPEDA principles, national and provincial privacy laws, as well as college recordkeeping guidelines.

Your software should provide:

- **Cloud backup:** With [cloud backup](#), dental practice data is copied daily, encrypted, and stored remotely on multiple cloud-based servers in a data center, rather than stored locally on a computer in your office. This allows you to access, retrieve, and restore online dental records in the event of a disaster. One key thing to note is that data residency requirements vary by the location the data is stored. Look out for whether your data is stored in Canada, which makes it easier to stay in compliance with national privacy laws.
- **Encryption capabilities:** Whether you're storing data electronically, referring patients, or sharing data between your practices, data should always be encrypted to ensure patient information does not fall into the wrong hands. Cloud backup providers will typically encrypt data at multiple points in the process, such as at the original source, in transit, as well as at rest in the provider's data center, to ensure maximum security. This is so even if your data is encrypted and thieves were able to get their hands on your practice information, they wouldn't be able to access it without an encryption key.
- **Access based on account type:** The ability to create user roles and grant appropriate access or personalize permissions based on the account type helps limit the number of users who have access to sensitive patient information and ensures everyone can access exactly what they need.
- **Audit trails:** An audit trail keeps track of all actions made within the software. If something important was accidentally deleted or altered, you can check the audit trail for what was deleted, when, and by whom.
- **SSL/TLS encryption:** The highest level of SSL (Secure Sockets Layer) and TLS (Transport Layer Security) is similar to bank-level encryption and ensures that any data transfers between offices are private and secure.
- **Mobile security:** If the software you choose offers a mobile app, it should be built with enterprise-level infrastructure so that your practice and patient data is fully protected. In the event that your device is stolen or lost, you need to be able to revoke access to mitigate potential breaches.

Ease of use

Your team is going to be using your dental software every day so the technology needs to make their lives easier, not hinder their work. Ease of use is crucial because your practice will be even more effective if your team is able to learn how to use the software quickly and easily.

Consider the workflows in your practice when you think about how easy the software is to use, for example:

- Does the software allow easy toggling from screen to screen as you complete tasks?
- Is the software color-coded?
- Is the navigation intuitive?
- Can digital x-rays be taken and viewed right from the charting screen?
- Does the software allow you to attach digital x-rays when you submit claims electronically?

Training

To ensure that there are no hiccups or interruptions to your daily business, look into whether the software provider offers training for your employees and provides access to support resources such as video tutorials. Look into the types of training that are available for your team at different stages.

- **Live training to get your team started off on the right foot.** Look into whether training is done locally or out-of-country as in-person training can help immensely when you're first getting started with the software
- **Locally held training classes provide huge value in a short amount of time.** If a software provider host local, in-person training classes, that will give you an opportunity to provide advanced, personalized learning for your staff at a much lower cost.
- **Online training is a quick easy, and often free way to learn tips and tricks for your software.** If your software provider offers live or even pre-recorded webinars, your staff will have the ability to tune in for a short amount of time and get a lot of great information from software professionals!

- **Employee onboarding materials for when you grow and hire more people.** These new employees will need to be trained on the software, and onboarding resources, such as guides and handbooks, will go a long way in getting new employees up and running as quickly and easily as possible.



Support

There will be times when things don't go as expected and your team needs technical support or troubleshooting. Consider the level of support a software provider offers:

- How fast are they in responding when you reach out?
- How efficient are they at resolving your issue?
- What type of support options do they offer? Think about which channels (phone, email, live chat, in-person) are most important to your team and choose a solution that caters to your needs.
- Are there good reviews about their support?
- Do they have support success statistics such as resolution times and live answer rates?
- What are their hours of operations like? You want to make sure you can get support when you will be needing it.



Chapter 02

Features to Consider

At the end of this chapter, look for our handy checklist summarizing the features we'll look into below - use it as you evaluate software providers to help you make a decision.

Contract billing

Check to see if the software provider offers contract billing as this feature can be useful for more than just orthodontics offices. If you have ambitions of providing larger, more expensive procedures at your practice, having the ability to split payments up over several months could allow you to make these procedures more realistic for more of your patient base.

Ledger

Does the software have an easy-to-use ledger? An intuitive ledger will help you quickly and easily access patient information to process treatments, process insurance, submit claims, bill patients electronically, print statements, and more from one convenient location.

Traditional methods of patient billing take time and are subject to human error. Automated billing helps you improve accuracy, streamline tasks, and gives you more access to insurance programs and payment options. Paper billing is being phased out of many insurance companies because it can take days, even weeks, to receive payments and process claims. With electronic billing, not only is your protection against embezzlement going to be significantly bolstered through things like user access rights and audit trail, you will be able to make adjustments in real-time if there is a problem with the claim, seriously cutting down on the back and forth.

EOB automatically calculates the correct percentage of coverage and populates the invoice so you don't need to calculate it manually. In the scenarios where a patient has multiple insurance carriers, COB will facilitate communication between the different insurance providers, automatically forwarding the EOB from the primary insurance to the secondary insurance to ensure accurate coverage and then populate that information in the invoice.

This solves the headache of coordinating with insurance companies and streamlines checkout and collection for both your admin staff and patients. You can see patients' coverage immediately and in turn, can provide accurate estimates of what the patient owes instantly, allowing you to collect immediately and cut down on accounts receivables. In short, EOB and COB cut down on a ton of admin time for your team.

Electronic Data Interchange (EDI)

The [CDA](#) (Canadian Dental Association) [iTrans](#) enables dental offices to securely and electronically submit dental claim benefits on behalf of patients to insurance companies. EDI (Electronic Data Interchange) is a method for dental offices to submit dental claims electronically, pre-authorize transactions, and ensure billing accuracy, minimizing conflicts with patients on how much they are paying. The CDA created [CDAnet](#) to give Canadian dentists EDI capabilities.

Note: The Canadian Dental Association (CDA) publicly lists software vendors who are certified to send claims electronically as well as the select few that can attach supporting document, such as digital x-rays, to their submissions. Save yourself weeks of waiting with digital submission in place of physically mailing these documents by choosing a software vendor with “Supports CDAnet attachments” beside their name on [CDA's list of certified vendors](#).

EOB and COB

Accurate [invoicing](#) and account receivables ensures a steady revenue flow for your clinic. Does the software provider offer automated EOB (Explanation of Benefits) and COB (Coordination of Benefits)?

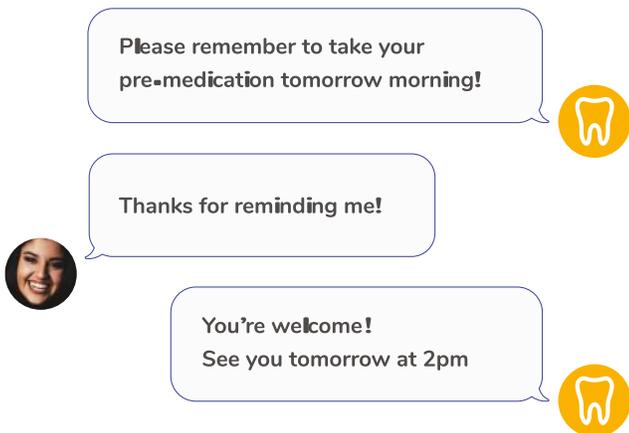
- EOB is the statement that is received from the insurance carrier with the correct amount of coverage for the patient.
- COB is the ability to forward the claim, along with necessary documentation, between multiple insurance carriers.

Patient scheduling

Ensure the software has a built-in smart scheduler (or can seamlessly integrate with one) that enables you to easily view and schedule appointments. Advanced dental software systems in the market today have drag-and-drop functionality that make moving appointments a piece of cake.

When your calendar isn't maximized effectively, time is wasted, patients are kept waiting, revenue is lost, dentists are burnt out, and the whole team is overworked. [Scheduling an efficient dental calendar](#) is an art form. An intuitive system will help you make the most out of each day and increase your practice's bottom line. A smart scheduler will help you easily book more production appointment, maintain a steady flow of hygiene appointments with automation, and keep your calendar full with suggestions such as booking family members together.

Patient communication



These days, more and more patients now prefer to text or email when communicating with their dental office. Your dental software provider should enable you to cater to your patients' preferred communication methods. A messenger-style system will allow you to connect with patients quickly but still be able to easily personalize each experience. Interactive 2-way texting means you get fast responses and can send group messages when there's a last-minute cancellation.

Automatic reminders

[No-shows and late cancellations](#) are the bane of every dental practice's existence. The good news is that the majority of them can be reduced by sending simple reminders. However, calling each patient takes up precious time that can be better spent elsewhere. Your dental software should enable you to set up and send automatic reminders. This is a feature that requires minimum effort but yields maximum results.

And the automation possibilities aren't just for appointment confirmations and recall reminders, you can boost your [patient retention and loyalty](#) by sending happy birthday messages and surveys to solicit feedback for improvement.

Dental imaging

With built-in charting and imaging, you're able to fine-tune your x-rays to your preference. Then, easily present these images to your patients to help them see the need for, and value of, your recommended treatment plan. Digital imaging also saves you time by automatically rotating, mounting, and labeling the correct tooth number before attaching it to the odontogram. It also keeps your admin staff fully informed, making coordination, communication and booking much easier and leaving more time to dedicate to patient care.

Practice communication

A practice communication tool enables your team to talk to each other easily offline, sharing pertinent information between the back operatory and front of house, ensuring a seamless patient checkout.

Staff hours tracking system

Don't leave timekeeping up to chance, a built-in tracking system allows you to accurately record your team's hours right from sign in to sign out. Reduce manual calculation and human error by customizing configurations like overtime rates and manager overrides so that hours tracked can be transferred directly to your payroll system.

iPad integration

These days, convenience is key. With an iPad integration, you can streamline patient experiences by offering digital check-ins and chairside signatures.

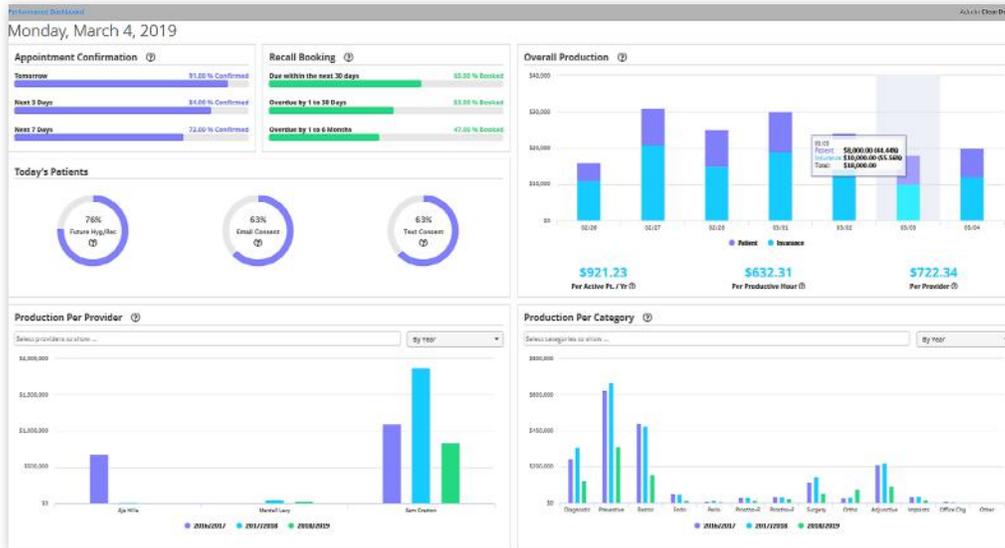
Inventory management

Never be caught low in stock with an inventory management tool that allows you to keep track of quantities, notifies you when supplies are running low, and gives you vendor price comparisons so you're always getting the best deal.



Mobile app

Dental software that has a mobile app allows you to securely access your practice schedule wherever you are and check in on patients and procedures. If you have multiple practices, you can also use the [mobile app](#) to connect them for a more holistic view.



Reporting

Reporting is an important factor in assessing how well your practice is doing and identifying opportunities for growth and profitability. Robust reporting gives you actionable insights so you can make informed business decisions. The level of reporting such as the types of analytics or the ability to sort and filter data will vary based on your needs. For example, you can analyze data like the number of new patients, referral numbers, revenue each team member generates an hour, chair utilization, attrition for each dentist, and the list goes on.

Look for:

- Simple-to-understand graphs that show you insights and trends at a glance
- A practice dashboard that gives you a visual representation of month-over-month performance and practice productivity
- Colour-coordinated charting to quickly glean how the practice is doing
- Customizable reports based on the analytics you want to focus on because every practice is unique

While you may not use every feature that a software provider offers, the one you choose should cover what you need it to do today, as well as in the future. Consider what your goals for your practice are and evaluate your options against those needs. If it's in your plans to grow and expand your practice, it's a good idea to look beyond your current needs and plan for the future when you consider your options.



Checklist

Download this handy checklist for when you are evaluating each dental software provider. Count each check as one point and tally them up at the end to help you compare and choose.

- Are they ISO and Health Canada Class II Medical Device-certified?
- Do they have a smart scheduler?
- Do they enable you to cater to how your patients want to be contacted?
- Can you set up automated reminders?
- Is there built-in charting and imaging?
- Does the software have an easy, intuitive ledger?
- Are they CDA-net-certified?
- Do they have EDI?
- Do they offer EOB and COB?
- Does the software offer contract billing?
- Do they offer practice communication?
- Can you track staff hours?
- Is there iPad integration?
- Do they offer a mobile app?
- Is there robust, easy-to-understand, customizable reporting?

Total Score _____



Chapter 03

How to Choose

With all the factors from the previous chapter in mind, **now it comes down to evaluating and choosing an option.**



01

Gather relevant stakeholders

The first thing you should do is assemble a decision-making team. The decision doesn't fall solely on you - **your whole team will interact with the software in some capacity, so they should have input as well.**

From office managers to dental assistants to dentists, gather all the team members who will be using the software on a daily basis to help assess the best solution for your practice. By involving your team in the process, you help empower them, as well as get buy-in for the software you end up choosing.

02

Understand what you need

Now that you have input from your team, determine the goals for your practice. This will help you determine what features you need and ultimately, what you want out of your dental software.

A single-practice business is going to have different needs than a multi-practice one. And whether you're just starting out or are an established practice, you'll need to think about both long-term and short-term goals and where you want to go with your business. If you are already using a dental solution, identify the things you like and what's not working with your current software to aid your search.

Once you've identified the key product features that you want, prioritize the features you consider to be essential. Based on that, you should be able to weed out some software solutions and walk away with a handful of options.

03

Research

Once you have your top choices, it's time for the bulk of the work: researching. There are many different ways you can research software:

- Read reviews from sites such as [Software Advice](#), [Capterra](#), [Top Ten Reviews](#), [G2 Crowd](#), [TrustRadius](#), and Google
- Read customer testimonials
- Read case studies
- Talk to current customers of the software
- Visit software providers' websites
- Talk to the sales teams

You'll also want to have a list of questions to ask each company for more in-depth research and to narrow down your list.

Some questions to ask are:

- How much will the entire software solution cost?
- What other costs or fees (implementation, hardware, maintenance, training) are there?
- Which programs/tools/software are you compatible with?
- What is the [data conversion](#) process?
- How much storage is there and is there a cost if more is needed?
- Does your software backup data automatically?
- In the event of data loss, what is your a backup process?
- Are [software upgrades](#) automatic and free?
- Are you CDAnet-certified? If so, what level of certification do you have?
- Are there hardware requirements?
- Is your software PIPEDA-compliant?
- Is your software licensed as a Class II Medical Device with Health Canada?
- What type of support do you offer?
- What kind of training and learning tools are available?

04

Compare options

After you've narrowed down the list and have gathered additional information, it's time to compare your short list. Go over all the solutions with your decision-making team and discuss each option. Encourage everyone to actively participate by asking questions and voicing concerns.

05

Choose your software

Finally, it's decision time. Take into consideration all the factors listed in Chapter 2, your business goals and needs, the research you conducted, as well as the team's input, and choose the software that best fits your business.



Chapter 04

Best Dental Software in Canada

To help you get started with your search, we've compiled a list of the best practice management software in Canada. The list was compiled by looking at the top rated, recommended, and reviewed dental software providers on [Software Advice](#), [Capterra](#), [TrustRadius](#), and [Top Ten Reviews](#).

Software listed in alphabetical order:



[ABELdent](#)



[ADSTRA](#)

CLEAR DENT

[ClearDent](#)

maxident
PRACTICE MANAGEMENT SOFTWARE

[MaxiDent](#)

Opidental

[Open Dental](#)



[Tracker](#)



Conclusion

Dental software is one asset that will not depreciate over time which means choosing a dental software is crucial in future-proofing and setting your practice up for long-term success or if you decide to sell down the line. There's no universally right answer for which dental software is best. Each practice is different and therefore has unique requirements. Ultimately, the decision comes down to which dental software best meets both your current and future needs.



ClearDent can help!

ClearDent's advanced dental software has helped over one thousand dental practices in Canada go paperless and run their business more efficiently. Our unified dental practice management software combines robust features with an intuitive interface that helps streamline and simplify processes for dentists and office managers.

[Sign up for a demo today](#)

166-5489 Byrne Rd, Burnaby
BC Canada V5J 3J1

Email info@cleardent.com

Web www.cleardent.com

Phone 1-866-253-2748

Fax 1-866-611-0548

CLEAR DENT