



ClearDent

Choosing Dental Software: **Your Guide to Choosing the Right Solution**

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

These days, finding a paperless dental software is a given. 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. **But beyond that, it's important to find a software that creates solutions for dentists and anticipates future needs and emerging technology.**

Software is a key factor in the overall success of your practice so use this easy-to-follow guide to ask the right questions when choosing the right solution.

Chapter 1

Key Factors to Consider When Choosing a Dental Software

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?





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.
- What are their hours of operations like? You want to make sure you can get support when you will be needing it.

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. Due to changes from COVID-19, ensure that training is able to be completed virtually and is comprehensive and engaging, which can help immensely when you're first getting started with the software.
- **Ongoing training** in the form of video tutorials is helpful because it's available on demand at all times. Look for a software provider that offers comprehensive support videos that guide you through how to complete specific tasks in their software.
- **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.
- **Continuing education**



Integration

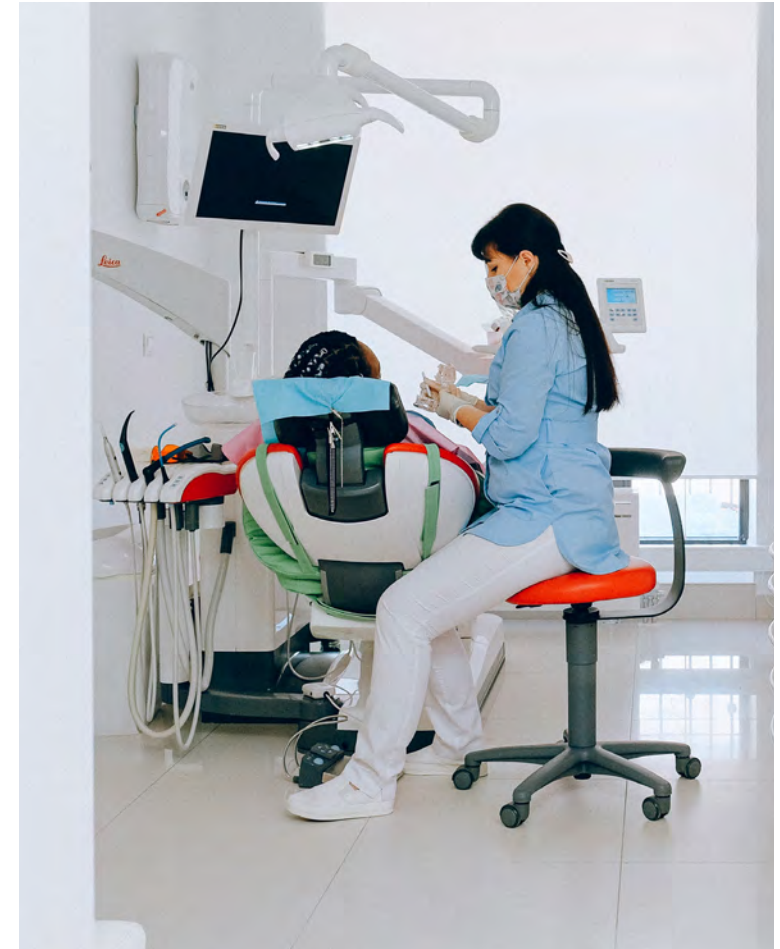
Consider a solution that either has or can integrate with what your practice needs. Rather than using several silo-ed programs to run your practice, a central solution will increase your efficiency, revenue, and patient satisfaction.

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.

Take the time to write down some of the key pieces of equipment that your dental software must integrate with, and bring those up in your discussion with software providers.

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

Cybersecurity 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.

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
- ✓ Encryption capabilities
- ✓ Access based on account type
- ✓ Audit trails (fraud protection)



Cost

Naturally, the first thing you are likely thinking about is cost. 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.

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.

Chapter 2

Features to Consider



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 high-production appointments and keep your calendar full with suggestions such as booking family members together.



Ledger

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

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, 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 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 prioritize multiple insurance carriers for a patient and calculate the amount of coverage from each carrier in sequence and then add to find the total covered amount.**

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.

Did you know?

The Canadian Dental Association (CDA) has a list of those who are certified to send claims electronically, and a select few are certified by CDAnet with the highest level. What this means is that those software vendors enable you to attach relevant support documents such as digital x-rays instead of having to mail them, which can reduce the turnaround time for insurance payment by as much as a whole month. These software vendors are indicated with a "Supports CDAnet attachments" beside their name on [CDA's list of certified vendors](#).

Patient Communication

These days, more and more patients now prefer texting 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 able to easily personalize each experience.

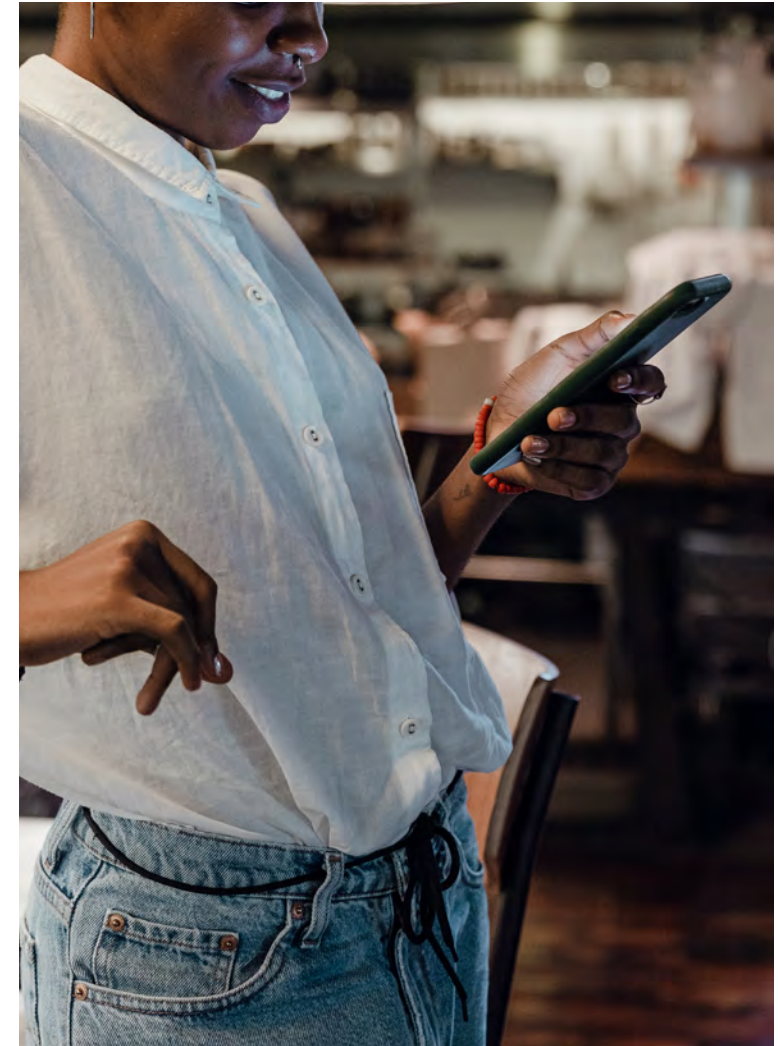
Interactive 2-way texting means you get fast responses and can send group messages when there's a last-minute cancellation. An additional method to consider is mass communication via email newsletters, useful for sending out patient-wide notifications such as updated office hours, policies, etc.



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.





Patient Portal

Social distancing will likely become the norm even after COVID-19. With that in mind, it is good practice to think ahead on how patients would prefer their dental experience to be. By using a patient portal feature, your practice is adding flexibility in your patient intake process by allowing online form submissions, digital signatures, appointment booking requests, and more. This can also allow you to cut down on the administrative costs associated with a physical waiting room and all the paperwork that can delay treatments from starting on time.



Dental charting

With built-in charting and imaging, you're able to fine-tune and see your x-rays in even greater detail. This feature helps save time by automatically rotating, mounting, and labelling the correct tooth number before attaching it to the odontogram, leaving you more time to dedicate to patient care.

Reporting

Reporting is an important factor in assessing how well your practice is doing and identifying opportunities for growth and profitability. 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
- ✓ Color-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

Contract Billing

Check to see if the software provider offers contract billing as this feature can save you a ton of time. This means for ongoing treatments, you can submit claims, send invoices, and automatically update ledgers for up to 50 patients at a time.

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.

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.

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.

Dental software features checklist

Use this simple checklist to determine what your priorities are when looking for a new dental software. Check all that apply to your dental practice.

- ☐ Does the software offer contract billing?
- ☐ Does the software have an easy, intuitive ledger?
- ☐ Do they offer EOB and COB?
- ☐ Do they have EDI?
- ☐ Are they CDA-net-certified?
- ☐ Do they have a smart scheduler?
- ☐ Do they enable you to cater to how your patients want to be contacted?
- ☐ Do they have the option for online patient intake through a patient portal?
- ☐ Can you set up automated reminders?
- ☐ Is there built-in charting and imaging?
- ☐ Do they offer practice communications?
- ☐ Can you track staff hours?
- ☐ Is there iPad integration?
- ☐ Do they offer a mobile app?
- ☐ Is there robust, easy-to-understand, customizable reporting?



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 offers a suite of solutions that can bring the relevant information about your business right to your fingertips. Using our reporting system and visual dashboard, arm yourself with the ability to make smarter decisions to grow your practice and maximize the productivity and production in your office.

Make smarter decisions with ClearDent