HOW TO BE A TRULY PAPERLESS DENTAL PRACTICE

By Lauren Krzyzostaniak
Being paperless isn’t just about being digital in the operatory and exchanging paper charts, notes and film for their digital versions. It’s also about eliminating paper from the front office. Think of all the paper your practice goes through in a day: forms for patient registration, medical history, HIPAA and treatment consent, just to name a few. What are you doing with all of that paper?

Many practices consider themselves to be paperless or digital, but they’re leaving out a big piece of the puzzle.

“Most practices are not really paperless,” says Paul Vigario, CEO of DSD Global and founder and president of SurfCT.com. “A lot of systems out there can’t handle being truly paperless because their foundation is old technology. Thus, doctors are told that they will use less paper but will need some paper.”

“There are many parts to a paper chart,” says Jana Berghoff, adviser and chief of systems optimization, Jameson Management. “The process to digitize different parts of the chart successfully evolved over time, so offices often would digitize one part of the chart and wait until they felt the digital offerings for other parts of the chart had reached an acceptable level to utilize the technology.”

Practices got by with what was available, utilizing digital options where they could and relying on paper files while waiting until the time, or the technology, was right.

“Thus, over time, being paperless has meant different things based on what technology the office was implementing,” Berghoff says.

It’s the same way in our personal lives, says Michael Norton, director of equipment and technology at Burkhart Dental Supply. While we
might pay some bills online, others we send via check. And some of us prefer to read the news on our phones or computers, while others still prefer holding a physical newspaper.

“I think dental practices are similar as different staff members still prefer the old way (with which they are familiar) compared to the digital paperless way,” Norton says.

Despite one’s preferences, it’s important to understand the benefits of operating without paper: greater convenience, stronger relationships and improved efficiency.

“In 2018, you can have your cake and eat it too!” Vigario says. “You can be truly paperless, and that’s good for everyone: the doctor, the practice, the team, the patient, the environment, the world. A more efficient digital workflow is good for everything.”

Once a practice decides to go fully paperless, they will not be met with a one-size-fits-all approach. There are many factors to consider when making the transition to a paperless practice. These three experts in the field of digital dental technology and digital records have given us insight on how to make the transition to a paper-free practice smoothly and efficiently.

**Find a technology partner**

“I can’t emphasize enough the importance of finding a digital or software partner that will listen to your concerns and help you develop a plan to meet your needs,” Norton says. He advises interviewing software companies to get an idea of how they’ve helped others and let them share what the best practices are for digitizing forms.

“The path to going paperless creates a lot of confusion because there are a lot of assumptions and fear about change, so I would recommend speaking to a true expert,” Vigario says. “Reach out to XL.Dent or one of our engineers at SurfCT.com. When done properly, it’s not only the smart thing to do for your practice, but it will ensure a digital workflow that elevates your practice, your team and your patients.”
To find the right partner, ask questions and be open to new ideas. Let the software partner create a plan for your practice. The ideal partner has helped many other offices transition into a paperless practice, so dentists should take the opportunity to learn from them about the best practices for digitizing forms. Find out what’s worked for similar practices in the past and model your process off of that. And make sure the software solution includes the things you use and need most like electronic records, digital forms, a patient portal and digital check-in – all in one system.

Once you’ve identified potential partners to help guide you along the way, the next steps are to assess, design, architect and launch your fully paperless practice.

**Conduct a current assessment**

In order to implement digital forms in the dental practice, it’s essential to first assess what’s in use currently, what can be eliminated and what should stay. Part of the assessment is to perform a HIPAA documentation and policy review. Determine if your practice’s policies and forms are up to date and if they comply with current HIPAA and HITECH regulations regarding PHI. Do you provide a notice of your privacy practices and have patients sign a TPO consent form? This is a great time to make sure that your practice is meeting up-to-date standards governing this area of the practice.

Along with assessing HIPAA and HITECH compliance, gather all administrative and clinical patient forms in the practice and assess their use. You want to know what they’re used for, how often they’re completed and by whom, if there is duplicated information between forms and if they’re relevant. If you can identify that you don’t need them, then move forward without them.

“Computers bring a different flow to the dental office and there are paper forms of old that really are obsolete once you do everything digitally, such as the sheet in the paper chart that lists the pending treatment the patient needs,” Berghoff says. “We write down what they need and cross it out when it is done, but this information is tracked automatically in the software, so the form does not need to be duplicated.”
“It really comes down to making sure you are collecting the important data that can help you better serve your patients’ needs and connect with your patients like never before,” Vigario says.

You’ll also want to identify the current patient communications and new patient registration process. In addition, note any core paper processes that can be automated and integrated so that you can capture and retrieve data in real time. For example, patient allergies, medications and conditions should be readily available to view and update as an interconnected part of the patient’s chart. This should happen at the exact moment the patient completes his or her health history form.

In addition to assessing the forms used in the practice, conduct a technology assessment by asking what technology is currently in place in the office. Is that technology effective? For instance, scanning paper forms to turn them into a digital file is an ineffective way to be digital. Why not start with a digital file to begin with? In addition, using signature pads and third-party systems that don’t provide native integrations with your practice management software is a step in the wrong direction.

Create the design
Once you’ve made a complete assessment of the systems currently in place, you can begin designing and strategizing plans for a paperless system.

“You need to build a plan that works for your practice,” Norton says. “Every practice’s needs are different, and what works for one might not work for another. Finding a digital or software partner who you can be open with and discuss your concerns with is the key. They have the expertise to help provide a pathway that will be both economical and successful.”

With a software partner by your side, you can begin designing the digital forms, identifying the touchpoints for the patient experience and understanding staff retrieval requirements. Because digital forms look and feel different than paper forms, we interact with them differently. Look into designing forms specifically for your practice. Then, consider where those forms will be completed and think about
the patient touchpoints in this process. Consider updating the phone
and patient scripts at this time as well. Before moving on to the next
step, ask yourself which of your staff members need to access the
forms and from where they’ll need to do that. Will it be in the patient
record or in the dental chart?

**Architect the system and automate patient check-in**

Another simple option to implement on your way to being
completely digital is an automated, web-based check-in. Patients
can even begin the registration process at home. The portals are
secure, which means your patients get the best of both worlds:
secure data transfers with the added benefit of having their medical
records and prescriptions there beside them to reference. Best of all,
they have more time to enter the information fully and accurately
without impeding on their chair time.

“It is a distinct advantage of time savings to have the patient fill out
registration forms before getting to the appointment,” says Jana.
“They can fill out forms when they have time and the advantage of
checking on their insurance options with their employer prior to the
appointment.”

It also makes the practice run more smoothly, she adds.

“Every clinician knows the frustration of waiting for a patient to fill
out forms before they can be seated. Often times, patients really do
intend to get to the appointment early to fill out forms, but traffic and
life happen and the patient does not arrive early, and then the entire
schedule is sent into turmoil,” Berghoff says.

Instead, patients can have their paperwork completed before even
stepping foot in the practice, which means the front office is ready
when the patient arrives. Another time-saving advantage is that
patients can update their medical forms at subsequent appointments,
rather than filling out new forms from scratch.

“I think it creates greater efficiency for both the patient and the
practice,” Norton says. “A patient can provide their information
before even coming into the practice, making the check-in process
much easier. This in turn allows the front office to be ready for when the patient arrives. It reduces redundancy of filling out forms over and over again with the same information, saving both the patient and the practice time.”

The difference for dentists is that your patients answer all the right questions within seconds, Vigario explains.

“This information is invaluable as it positions the doctor and the team to provide care with purpose,” Vigario says. “When you design purposeful technology like XLDent and you provide care with purpose — when you do things the way they should be done — everything improves in your practice, with your patients, with your life.”

**Implement the system**

Moving the dental practice away from paper and into the digital age is easier said than done. The good news is that dental software companies know that it’s no easy feat for a dental practice to maneuver out of the ’90s and into 2030, which is what it feels like sometimes.

Many dental software companies will also provide an implementation specialist to help existing practices transition into the digital age in the most seamless way possible. For example, the specialists at XLDent create a training plan for the practice and identify team members who can be the “go-to” people for questions on the new software and workflow.

Most existing practices start by implementing practice management software, the benefits of which are seen immediately. Dental practice management software simplifies and improves patient care by automating simpler tasks, such as filling out new patient forms and integrating patient information into one easy-to-view place.

The system should work to provide everything you need to know about and communicate to your patient from one point of access, from patient history and treatment plans to claim narratives and reports. You should be able to make and find appointments, send reminders, enter procedures and check patients out more easily than you could with paper records.
Experience success

“When this technology is properly implemented, it cuts back on one person from the front desk,” Vigario says. “The efficiencies pay for themselves. A patient benefits from better care and spending less time writing on a clipboard. Furthermore, the digital forms can ask the patients the questions you need to know to profile a patient and provide them with the treatment that best serves them.”

“The upfront investment can immediately be offset by the human resource efficiency and be further enhanced by the practice growth element that so many practices are missing out on because they haven’t truly gone paperless,” Vigario adds.

Vigario argues that a truly paperless practice is like having a crystal ball because you have a better idea of what the patient wants — a major advantage for any practice looking to better serve their patients. Once the technology has been implemented, get the word out and get your patients excited about what your practice has to offer. You can do that by creating a marketing plan that utilizes paper communications, social media, statement stuffers and verbal communications, just to name a few.

“Personally, I don’t think a practice should even be questioning moving to digital forms,” Berghoff says. “The only question is, ‘Do we do it now or in the near future?’ The advantage is the time savings. If the patient fills out the form within the software (or online if available) and the information populates in the software, the time savings and increased accuracy is well worth the investment.”

Norton adds, “When you create a digital standard that is all inclusive, you can provide a higher patient experience and gain greater productivity within your practice.”

No matter where your practice is on the road to being paperless, XLDent is ready to help. To view their complete dental software suite and learn more about being paperless, visit XLDent.com.