

Technology Guide



How to Go Paperless In the Dental Office

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Is it possible to truly “go paperless”?



“If someone has done it,
it is probably Possible.”

Omar Reed

The real answer to this question is yes...but. It depends on what you mean by “paperless”. The goal is not to eliminate all paper. There are many effective uses and needs for paper. However what is possible and highly desirable is to create a paperless dental record.

Many offices have successfully adapted a digital or paperless dental record. So as Omar Reed famously said; it is possible.

Dead Trees: It has become fashionable on the Internet to refer to traditional newspapers as “dead tree” media. This of course refers to the many thousands of trees that are cut down every day and used to make paper. If you are using traditional paper charts then you are using “dead tree” charts. There is a better way.

A digital record means that there is no paper folder with patient information. All the charting, diagnostics, correspondence, financial records, scheduling and so on is recorded and saved on a computer. There is no paper record.

Going paperless is a process not an event.

Guide to Creating Digital Charts

Item	Software	Hardware	Process	Alternative
Personal Information				
Name Address Phone etc.	Practice Management System	Keyboard and mouse	Type information into patient record	Import information from an electronic source such as a web page or a tablet PC
Outgoing Paper Correspondence	Word Processing	Keyboard and mouse	Type in letter, print it for mailing, then import it to the patient record. Do not keep a paper copy.	Fill pre-formatted letter from template with data exported from patient record
Incoming Paper Correspondence	Practice Management System	Scanner	Scan the letter, import to patient record and then shred the paper.	
Electronic correspondence	e-Mail application like Outlook	Keyboard and mouse	Type message and send via e-mail with copy or link to patient record. Copy incoming to patient record.	Extract data from electronic record to fill pre-formatted e-mails and send automatically.
Forms, Medical Consents etc	Practice Management System	Keyboard, mouse and scanner	Have the patient fill out a paper form, then click or type in essential data to the patient record. Then scan and import the form with a signature to the record.	Use a tablet PC to directly capture the patient data with electronic writing and import the information including an electronic signature to the patient record
Diagnostics				
X-Rays	Digital Radiography Specific	Direct Sensor and/or Digital Panoramic	Place the sensor like a film and directly capture a digital image into a specific electronic record attached to the patient record.	Capture a digital image with a phosphor indirect sensor and scan it into the software
Photographs	Image Management either dental specific or general photographic	Digital Camera, a Card Reader and possibly a video capture card	Take photos and download them to the image management software. Either link the photos to the patient record or store them as part of the record.	Capture a digital image from an intraoral video camera with either a capture card or direct USB digital connection.
Perio Probing	Practice Management System or perio specific charting software.	Electronic Probe like Florida Probe	Capture probing depths directly with the probe and foot control.	Speak in the probing depths with voice activated perio charting or type in the numbers with a keyboard
Treatment Information				
Tooth Chart	Practice management System	Mouse and keyboard	Click in tooth conditions and restorations with an on screen chart	Speak in conditions with voice activated charting.
Treatment History	Practice management System	Mouse and keyboard	Chart notes are entered automatically when procedures are completed. The dentist edits the notes as needed	Speak in notes with voice recognition software.
Treatment Plans	Practice management System	Mouse and keyboard	Click in proposed restorations and other treatments with an on screen chart. Display selected treatments for patient acceptance.	
Lab slips	Practice Management System or Lab specific software.	Mouse and keyboard	Type in lab procedure or click in data from patient record. Print and send with case.	Send lab Rx via e-mail or through lab web page with attached photos.
Prescriptions	Practice management System	Mouse and Keyboard	Prescription is linked to patient record choose from menu, print and sign.	
Specialist Referrals	Practice management System with word processing or e-Mail	Mouse and Keyboard	Note referral in patient record then transfer diagnostics such as radiographs and photos to a word document then print and send with patient	Rather than printing send the clinical data and diagnostics to the specialist via e-mail.
Re-Call Information	Practice management System with word processing or e-Mail	Mouse and Keyboard	Note re-call interval and track automatically within patient record. Create and mail cards as reminders.	Rather than printing cards software automatically extracts re-call data and sends e-mail.
Financial Information				
Insurance Forms	Practice Management System	Mouse Keyboard and Internet	Select completed procedres from patient record and send e-claim	Print and mail claim
Insurance EOBs	Practice Management System	Scanner	Scan EOB into patient record and shred the paper	Import EOB from e-mail or web page
Payment History	Practice Management System	Mouse and Keyboard	Enter payments	

Forms and Signatures

Forms and signatures are one of the essentials of record keeping. There are three (actually four) methods to create paperless forms. The easiest method, is to start with paper then scan it. For more advanced users there are three ways to gather the information electronically and totally bypass the paper.

Scan It: The most basic way to eliminate paper forms is by simply using a scanner. The patient fills out a paper form as always. The administrator still needs to copy in the data using mouse and keyboard. However the next step is to digitize the completed paper form with a scanner, store it in the electronic chart and then shred the paper.



Digital Signature Pad: The second way to fill in forms that is easy and inexpensive to implement is to simply use existing desktop computers and a signature pad.

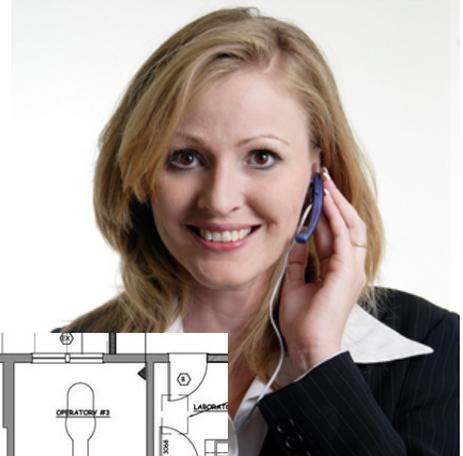
Forms are loaded onto a desktop computer. Then the patient fills in the information using a keyboard and mouse. If the patient is unable or unwilling to use the computer directly a team member can ask the questions and fill in the information for them.

Once the forms are complete the patient and the doctor can sign using a digital signature pad just as you do when signing electronically with a credit card.

What is the Front Desk?

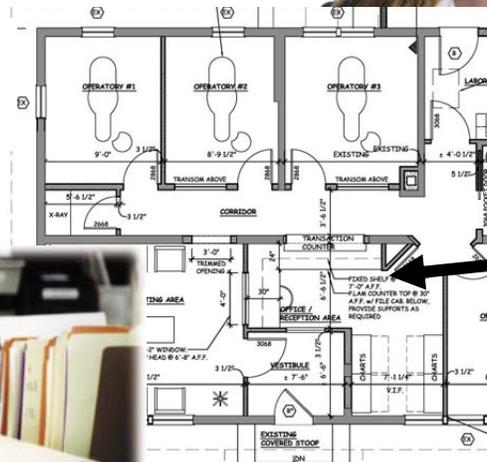
Is it a person?

“The front desk will make your appointment.”



Is it a place?

“Stop at the front desk and ask.”



Is it a thing (a system)?

“The front desk handles all that.”

It is all of those. The term front desk, as used in the dental office, does not refer to a piece of furniture. Front desk refers to the business system of gathering information (or data) at a single location and administering the non clinical business functions. Non clinical functions include scheduling, billing, insurance processing, in fact everything except the diagnosis and treatment of dental disease.

The Front Desk is the “Data Center” of the office.

Front Desklessness is not about tossing out a piece of furniture or eliminating a staff person. It is all about doing the non clinical business functions in a different way because technology allows us to handle data in a much more efficient manner.

Tablet PC

A tablet PC is a mobile computer in the shape of a slate. Tablets use a touch screen that allows the user to operate the computer with a stylus (a digital pen) or a fingertip, instead of a keyboard or mouse. In other words the user can simply tap the screen to check off a box on a form.



Tablets users can also use the stylus to write or draw on the screen. In this way the patient can actually sign a document. Writing can be converted to typed text. An alternative is to use an onscreen keyboard and type in the information.

The tablet can be connected to the office computer system using a wireless network. In this way the information is stored instantly and could even be transferred to the patient's dental record. That means that the front desk administrator does not need to re-enter the information.

The dentist or a team member can review the information and make additional notes and sign as well.

Consent forms, HIPPA forms and all the rest can be presented on the tablet and the patient can sign. The

computer can even track who has signed and who hasn't and then warn the office if a form is missing.

Electronic Signature Pad

Another input gadget that is useful in dentistry is an electronic signature pad. These pads start at less than \$200 and can be used to add a signature to electronic forms and records. See the forms section page 20 for more information.