

Non-dental software 4 business software applications

Dr. Emmott looks at four useful, cost-effective business software applications: word processing, spreadsheets, checkbooks, and time clocks.

By Dr. Larry Emmott



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Many powerful, non-dental, business software applications are available to help you run your dental office more efficiently and to save you money. These general business programs can be effective, and they usually cost much less than the specialized dental programs with which

we are familiar. This article looks at four types of basic business software—word processing, spreadsheets, checkbooks, and time clocks (see also the “Buying business software,” sidebar below).

1. Word processing

The most obvious of these four business applications is word processing. If you aren't yet familiar with how word processing works, stop immediately. This is a techno emergency! Put down this magazine and go directly to a local computer store or to a community college and sign up for a basic word processing course. I am not kidding. Everyone (even the dentist!) will benefit from understanding and using a word processing program.



One of the major benefits of knowing how to do word processing will be a greater understanding of general computer functions, basic Windows processes, and file structures. However, most significantly it will allow you to see the potential for using your office computer system to the maximum.

At the most rudimentary level, word processing is like using a typewriter. But that's like saying driving a car is like walking. Sure they both get you from one place to another, but there's a big difference. You will use word processing to create simple letters, but it will also be used for case presentations, note templates, newsletters, database marketing, office signs, and even Web pages.

Cost. There are many good word processing programs. At this time, the most popular is Microsoft Word 2002, which generally sells for around \$300. Word 2002 helps one write, edit, and format a variety of print, e-mail, and Web documents.

Mail merge. One example of a sophisticated use of word processing is to combine your patient data with a Word document in a mail-

merge function. This is a form of database marketing that simply is not possible without a sophisticated dental management system integrated with word processing.

Mail merge enables you to generate form letters. To use a mail-merge system, you first store a set of information, such as a list of patient names and addresses, in one field. In another field, you write a letter, substituting special symbols in place of names and addresses.

For example, to create a mail-merge document, your computer could find all patients whom you have not seen in more than 18 months. The computer then could check to see if these patients are scheduled for a visit in the next 90 days. If these patients haven't been seen, and they aren't scheduled, the computer will create a letter to them. The letter will pull data from the patient file so that it is customized to that patient. For an example of this process, see the “Creating mail-merge patient letters,” sidebar on page 58.)

This type of sophisticated marketing is not the same as bulk mass marketing. In fact, it is the opposite; mail merge is mass customization. The computer carefully selects the appropriate patients and then customizes the letter to appeal to each individual.

2. Spreadsheets

Microsoft Office XP Standard is an extremely powerful program. The more you use and understand it, the more uses you will find for it in the office. In addition to word processing, another general business application that many dentists find useful is a spreadsheet. A spreadsheet allows users to arrange data and analyze it using an almost endless list of variables and functions. The leading spreadsheet program is Microsoft Excel (included as part of Microsoft Office XP Standard).

Many common applications, including most dental management programs, will allow users to transfer data to an Excel spreadsheet. Once the data has been transferred, the user can use the spreadsheet functions to analyze the data. This frees the user from the confines of pre-selected reports built into management programs. A spreadsheet literally makes it possible to compare any piece of datum to any other piece of datum.

Fee analysis. To understand how a spreadsheet works, see the “Fee review analysis, 2002-2003, for John Smith, DDS” on page 59. The analysis shows three fields that compare old (2002 fees) and pro-

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BUYING BUSINESS SOFTWARE

To learn more about the applications and costs of the business software that Dr. Emmott mentions in this article, check the Web sites of the following companies:

Software type (Purpose)	Examples (Co. Web site)	Price (Approximate \$)
1. Word processing (Create mail-merge letters)	Microsoft Word 2002 (www.Microsoft.com)	Around \$300
2. Spreadsheets (Analyze fees)	Microsoft Office XP Standard* (www.Microsoft.com)	Around \$420
3. Checkbook programs (Track checks/payroll)	QuickBooks Pro Edition 2003 (www.quickbooks.com)	Around \$280
4. Time-clock program (Track staff hours, sick time)	ClockMax.com/Acroprint Time Station (www.timestationpc.com/index.html) HourTrack† (www.vitrix.com) Power Clock (www.powerclock.com) TimeClock Plus (www.timeclockplus.com)	From \$200–\$400

* Microsoft Office XP Standard contains the core Office XP 2002 programs: Microsoft Word, Excel, Outlook, and PowerPoint.

† HourTrack users include Dr. Emmott.

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posed new (2003) fees for three procedures. One of them is a prophylaxis (Adult Prophylaxis), which shows a fee of \$36 in 2002. Based on the number of prophylaxis procedures done in 2002 (1,850), the total generated for all prophylaxis in 2002 is \$66,600.

With a proposed new prophylaxis fee of \$42 for 2003, the projected production for prophylaxis fees in 2003 becomes \$77,700.

Any of the variables—that is, the cur-

CREATING MAIL-MERGE PATIENT LETTERS

Mail merge can be used to mass customize letters to patients, as for example, letters to patients whom you have not seen in more than 18 months.

Mail merge uses two software applications: a dental management system, which has patient data, such as names and addresses, and word processing, which creates the sample patient letter.

Across, Dr. Emmott gives an example of a mail merge sent to patients using data fields from the PATCH (Pain, Appearance, Time, Cost, Health) system. PATCH is a program developed for a business course called “Dental Concierge — Developing a CA\$H Practice” taught by Robert H. Maccario at the Las Vegas Institute for Advanced Dental Studies (telephone: 888-584-3237; www.lvilive.com).

Sample Letter

<data merge 1>

Dear <data merge 2>,

We have missed you. Did you know your last dental visit in our office was <data merge 3>? At that time you told us that your chief concern was <data merge 4>. In order to keep <data merge 5>, regular dental checkups are essential. It is much <data merge 6>.

To schedule an appointment please call Mary at (555) 123-4567. On the other hand, if you have moved and found another dentist please let us know that as well, and we will transfer you to our inactive file.

Good dental health starts with regular care. We hope to hear from you soon.

Sincerely,

<data merge 7>

Data fields

To fill in the seven data-merge fields in the sample letter above, the computer will choose from among the following patient data files and from the PATCH system. Below, pain (P) is highlighted as the patient's chief concern.

<data merge 1> Patient's name and address

<data merge 2> Patient's preferred name such as Beth or Elizabeth

<data merge 3> Date of last dental appointment

<data merge 4> One of five chief concerns the patient expressed using PATCH.

P = Pain, **A** = Appearance **T** = Time, **C** = Cost, **H** = Health

<data merge 5> One of five scenarios based on the PATCH in field 4

P = dental treatments quick and easy with minimum discomfort

A = your teeth looking and feeling their best with a bright smile

T = your time in the dental office to a minimum and avoid emergencies

C = the cost of dental treatment low and reduce the need for expensive treatment in the future

H = your mouth healthy and reduce the chance of cavities or gum disease developing

<data merge 6> One of five benefits based on PATCH in field 4

P = easier and more comfortable to have your teeth cleaned before a lot of tartar builds up.

A = easier for you to keep your smile bright and attractive when the hygienist cleans off the stain and tartar for you.

T = better to plan a dental appointment than to have an emergency disrupt your schedule.

C = less expensive to prevent problems with early detection.

H = healthier to prevent disease than to treat it later after the disease has done permanent damage.

<data merge 7> Name of sender, such as dentist, office manager, or dental hygienist.

Here's a fee review analysis using Microsoft Excel to compare 2002 fees with proposed 2003 fees.

FEE REVIEW ANALYSIS

(Production/transactions by code) 2002 to 2003 • John Smith, DDS

CODE	OFFICE CODE	DESCRIPTION	OLD FEE (2002)	# OF PROCEDURES LAST YEAR	PRODUCTION AMNT \$	NEW FEE (2003)	PROJECTED PRODUCTION \$
120	EXAM P	Periodic Oral Evaluation	\$22.00	1500	\$33,000.00	\$23.00	\$34,500.00
150	EXAM I	Comprehensive Oral Evaluation	\$89.00	121	\$10,769.00	\$91.00	\$11,011.00
1110	REPRO	Adult Prophylaxis	\$36.00	1850	\$66,600.00	\$42.00	\$77,700.00

rent or proposed fee, as well as the number of procedures—could be changed. When the variables are changed, the spreadsheet automatically does the math and changes the results (see “Fee review” chart, above).

Loan calculator. In addition to fee review and analysis, another great spreadsheet application is its use as a loan calculator. For example, the spreadsheet can be used to show patients the possible monthly payments they would incur when making financial arrangements to pay for their dental treatment. This is particularly helpful if you offer patients an outside finance source for payments, such as CareCredit. (CareCredit offers practices healthcare financing plans that assist patients in paying for desired procedures.)

No matter which application you use Excel for, get some training. Excel is an extremely powerful application and, to use it well, requires training. Learning to use it is not a techno emergency; however, users would do well to take a local course.

Cost. Most businesses will buy Word and Excel packaged in a Microsoft Office XP suite. Microsoft's Office XP Standard suite sells for around \$420 and contains four core 2002 programs: Microsoft Word and Excel, plus Outlook (an organizer and e-mail program), and PowerPoint (for slide presentations).

Microsoft Office XP Professional includes this four programs plus Microsoft Access 2002, a database program.

3. Checkbook programs

Another great non-dental application is a checkbook accounting program. In the most basic versions, the program is simply an electronic check register that does the math for you. On a more sophisticated level, a checkbook program will print your checks and track all of your spending. At the highest levels, the program will create a complete payroll; project upcoming expenses; and provide you with all major reports, such as profit and loss or balance sheet, which you used to need a CPA to generate.

The most widely used business checkbook/accounting programs are QuickBooks—Basic, Pro, and Premier (www.quickbooks.com)—from Intuit, a financial-software company. Each version offers small businesses a simple solution for managing their finances, including tracking payables, printing checks and invoices, and compiling accounting reports.

Many accountants now use these QuickBooks programs with their clients. You can even send your financial data to your CPA's office via e-mail using

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QuickBooks. No more boxes of cancelled checks and old receipts.

Intuit also offers payroll services (www.payroll.com) that seamlessly integrate with QuickBooks. This means you won't need to pay companies such as Paychex or ADP (Automatic Data

Processing) for payroll services, you won't have to re-key your payroll data, and you won't have to pay your accountant for monthly reports. In addition, you will have instant access to the most up-to-date financial information about your practice.

Cost. QuickBooks Pro Edition 2003

sells for about \$280.

Also of note is the latest addition to the QuickBooks series: QuickBooks Premier 2003, which meets the needs of more complex small businesses with up to 20 employees. It has advanced accounting programs and business plans, and more than 100 professional form design tem-

plates that can be customized to help your business look more professional.

4. Time-clock programs

A final business application is a software solution that can turn your computer into a time clock. Time-clock software offers tools to automate your practice's time and attendance records and other tasks.

Time-clock programs will add up hours worked, track sick time and vacation time, generate reports, and even transfer all of this data to QuickBooks, the checkbook program that tracks spending and payroll (see No. 3 on page 59).

Cost. An old-fashioned mechanical clock with punch cards can cost well over \$1,000. A time-clock software program will cost much less—from \$200 to \$400—and it will do much more.

There are many time-clock programs, and information about their programs are available online. Products include: 1. Acroprint Time Station PC from Online Distribution Co.; 2. HourTrack from Time America, a Vitrix Co.; 3. Power Clock from PowerClock.com; and 4. TimeClock Plus from Data Management. (For Web sites, see the "Buying business software" sidebar on page 56.)

In summary, the four non-dental software applications reviewed in this article—word processing, spreadsheets, checkbook, and time clock—are only four of the many useful and cost-effective business software applications available on the market today. Other useful programs are available if you look for them.

And here's a final word of advice. Whenever you buy new software, be sure to budget time and money for proper training. The more time you spend now setting up a program properly, the more it will pay off in the future. After all, the future is coming and it will be amazing. **DPR**

Dr. Larry Emmott, a recognized authority on dental technology in America, is a practicing general dentist in Phoenix. He also is an award-winning professional speaker, a featured instructor at the Las Vegas Institute, and a member of the American Academy of Dental Practice Administration. He has written hundreds of articles on dentistry, computer use, and management. Since 1995, he also has written a monthly electronic newsletter, "Emmott on Technology," on using dental technology effectively. Dr. Emmott offers hands-on technology seminars to selected dentists in his Phoenix office (the next ones are Feb. 28-March 1 and Oct. 3-4). At these seminars you will receive personalized advice on setting up your office to maximize your high-tech future. Topics include digital radiology, cosmetic imaging, and treatment room design. To find out more, check Dr. Emmott's Web site at www.drylarryemmott.com, or he may be reached at 602-279-1641.

Photo credits

Photos of software packaging on page 56 courtesy of Microsoft Corp. (Word and Office XP Standard), Time America Inc., a Vitrix Co. (HourTrack), and Intuit (QuickBooks Premier).