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# Management software: the benefits of computerized charting

Switching from paper charts to computerized charting offers many benefits, but to make it work, you must use the computer to chart all aspects of patient care, from scheduling and diagnosis to treatment and payment.

By Dr. Larry Emmott



*"If it was good enough for Pierre Fauchard in 1728, it's good enough for me."*

This is the attitude of some dentists when it comes to computerizing the patient chart. They don't see its value and are concerned about its cost. "After all," they say, "the paper-based system we are using now is working OK, and it doesn't cost us anything."

What these dentists fail to realize is that the system they are using isn't all that great, and it does have costs in both facilities and human effort.

### Paper charting: disadvantages

Go back to your chart room and pull out, at random, the chart of a patient you have been seeing for some time. What's in there? Usually there will be an information sheet with name, address, and other contact data. There will be a health history. There will be some sort of tooth chart, some financial information, and a history with hard-to-read written notes, which

typically appear to be created in a top-secret code.

**A sea of paper.** However, this is just the beginning. Most dental charts have many more bits of paper that accumulate like pocket lint. These papers include lab slips, prescriptions, correspondence, periodontal probings, insurance forms, specialty referrals, consent forms, x-rays, Health Information Portability and Accountability Act (HIPAA) forms, re-call information, insurance EOBs, specialist reports, photographs, treatment plans, and financial arrangements.

Further, this chart didn't just appear in the office for free. The paper folder and other papers alone cost a couple of dollars. If you have 2,500 charts, they have cost you at least \$5,000 to create, and every time a new patient walks in, it's another two bucks.

Now that you have finished looking over the accumulated chart debris, stuff it all back in at random (that's how you found it to begin with). Try not to tear the edges any more, and wedge it back into the file cabinet somewhere close to the proper alphabetical section.

Then, take a step back and look at all the charts. How much space do they take up? In what type of file arrangement are the charts stored? How many "inactive" charts are stashed away somewhere else?

**A range of costs.** A typical office with 2,500 charts will need three or four full-sized, lateral files to hold all of the charts. Depending on how "nice" the lateral files are, they will cost at least \$2,000, and they could cost much more. The files will take up office space, costing another \$550 per year. (That's an average; urban rents in New York City or San Francisco are frightening.)

But that's not all. What about the cost of the human effort to make the chart, type the label, arrange the contents, file new bits when they arrive in the mail, write the notes, pull the charts every day, and then re-file them? And, of course, there is the daily ritual of the lost chart, which no one can find, only to have it turn up days later, either misfiled or hiding in a stack on the doctor's desk. The human cost for tracking paper files is at least \$8,000 per year.

What we have is a paper-charting system that actually doesn't work all that well. In addition, the system really is quite expensive. It costs about \$7,000 to create the system and another \$8,500 a year to maintain it. A good electronic chart will eliminate paper, organize data

better, work better, and cost less than the old paper-based charts.

### Computerized charting: benefits

Charting software has many advantages, including the following:

**Eliminates paper.** One of the most important features of charting software is that it eliminates all paper. That means the software must accommodate all the bits of paper data outlined above, and it must have a method of importing virtually anything either with a scanner or with a file-import function. If some bit of paper—possibly a lab slip or a patient letter—must be stored in a folder, then you have lost one of the primary benefits of an electronic chart.

**Uses single entry.** Another important feature of charting software is full integration. That means that each item, such as a patient's name or a procedure, is entered one time, and then the item transfers to wherever else it is needed electronically. The item

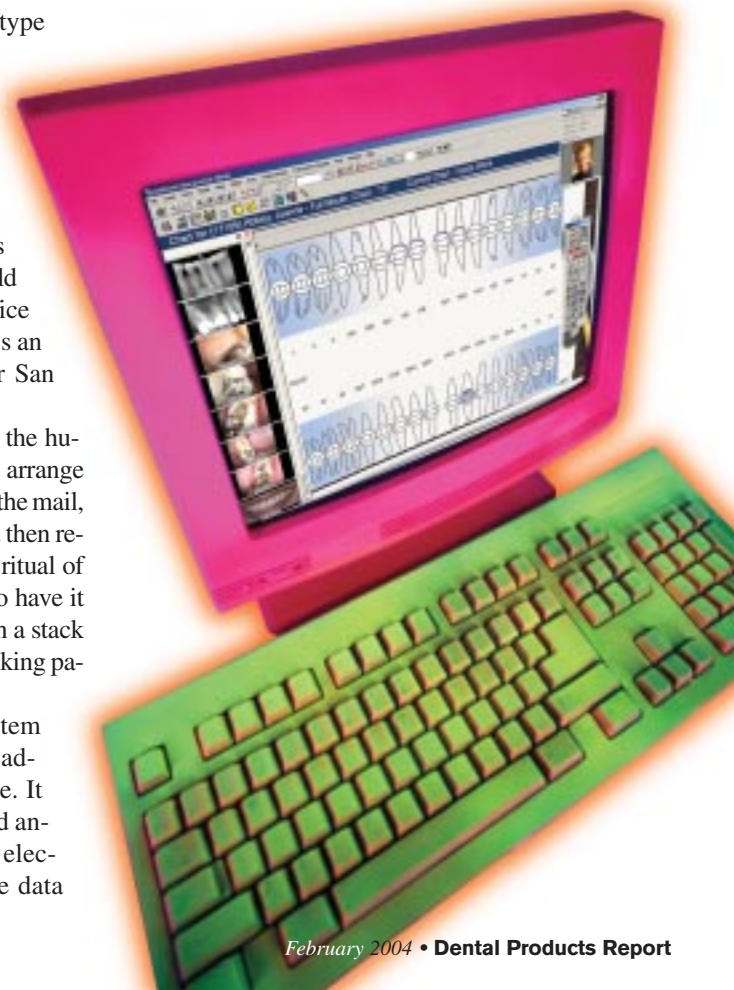
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## Building a high-tech office: a 10-article series

Starting this month, Dr. Emmott will be presenting a series of 10 articles designed to guide a dental office through the process of choosing and using high-tech systems. The articles are, as follows:

- **Management software:** charting (Feb.), scheduling (March), and finances (April)
- **Hardware in the operator** (May)
- **Digital photography** (June)
- **Q&A on building a digital practice** (July)
- **Digital marketing** (Aug.)
- **High-tech diagnostic devices** (Sept.)
- **Online consultations** (Oct.)
- **Digital applications of intraoral cameras** (Nov.)

Integrated management software for charting, the first element required in building a high-tech office, is this month's topic. It will be followed by articles on two specific charting topics: scheduling and finances. *Note:* Throughout this three-part software segment, Dr. Emmott emphasizes that it isn't enough to have the software—you must use it.



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is “integrated” into all of the various electronic patient records.

For example, with single entry, a procedure, once typed into a computerized record, will progress from diagnosis, to charting, to treatment planning, to scheduling, to treatment, to insurance, to payment, with-

out the need to retype the data. This is called single entry. If the user has to re-enter information—such as procedure codes, tooth numbers, or fees—at any stage, then the software is not fully integrated.

#### **Software checklist**

When looking for charting software, take

a close look at what the program can do:

**Does the software accommodate all data needs?** Charting software must accommodate all of the information we used to record on paper. This data includes existing restorations, conditions, diagnostic findings, treatment plans, periodontal problems and tissue conditions, tooth surfaces,

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### Features to look for in charting software

Here are some features to look for when buying management software to replace your paper charting and recordkeeping systems with computerized charting:

#### **Ease of use**

How many mouse clicks or keystrokes does it take to enter a procedure or record treatment notes?

#### **Integration**

Does the chart transfer information automatically from the patient computerized chart to the schedule or the ledger without the need to re-enter data?

#### **Import capabilities**

Can you transfer any information that is now on paper to the electronic chart, with either a file transfer (file import function) or a scanner?

#### **Complete data**

Does the electronic chart include existing restorations, perio, diagnostic findings, conditions, progress notes, and all the rest?

#### **Inputs**

Can you enter data with voice commands, touch screens, or ink?

#### **Customization**

Can you customize the chart for your office with shortcuts and quick buttons to make it more user friendly?



materials, and procedure notes.

**Is the software easy to use?** Charting software must be easy to use. Every mouse click or keystroke slows down the process of entering data and makes the program harder to use, which means it doesn't get used. The more the user can customize the chart, the easier it is to use. This means users can create shortcuts, eliminate features they don't use, and designate functions for each button.

**Is data entry fast?** Data entry needs to be fast and easy. The standard still is mouse clicks and keystrokes; however, faster, more intuitive, entry methods are available.

One of these data-entry methods is voice. We'd all like to talk to our computer just like in “Star Trek.” Some charting programs allow users to “speak” to the computer to enter clinical findings such as pocket depths and tooth conditions. An-

other alternative data-entry method is touch. Instead of clicking a mouse, the user touches the screen.

Coming soon will be “ink” data entry, a function allowing users to write or draw on a chart as if it were a piece of paper.

### Use it or lose it

To get the most out of charting software, you must use it for everything you now record in the office, from diagnosis to payment. This means the computer needs to be in the treatment room during examinations. If a procedure is entered at diagnosis using the single-entry concept, then everything else is easier and faster.

One of the mistakes dentists make with charting software is that they only go part way. They use a paper chart in the treatment room during diagnosis to mark future treatment. But then, they take the paper chart to the computer and enter everything again. They then use the computer to create an estimate, insurance forms, and a schedule. Then, though, they go back to the paper chart to enter procedure notes, back to the computer to take a payment, back to paper for a prescription, back to the computer for the next appointment, then back to paper to check the x-rays.

What the office ends up with is a mess. Everything is done at least twice. The paper chart still is needed. No one ever is sure if something is on paper or in the computer. As a result, the computer chart doesn't save time and money; it makes things worse.

Remember, computerized charting is:

**Faster.** You don't need to go get the chart and re-file it. You don't need to spend time writing the same thing over and over again.

**Better organized.** Everything isn't stuffed in a folder at random; rather, all data is organized in the electronic chart by default. That means users instantly can find anything with an electronic search. The chart will never be lost in an office stack.

**Less expensive.** Paper charts and file cabinets for 2,500 patients cost at least \$7,000 and take up a chunk of office space. A data server for the dental office costs about \$3,500, accommodate more than 2,500 patients, and takes up about a foot of space.

Pierre Fauchard didn't have a choice, but you do. Don't stay stuck in the past; move into the future, for the future is coming and it will be amazing! **DPR**

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*Dr. Larry Emmott, a recognized authority on dental technology in America, is a practicing general dentist in Phoenix. He also is a 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. He also writes a monthly electronic newsletter, "Emmott on Technology."*

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