Computers for Practice Management for the Denturist

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DOM (Denturist Office Manager) by Specialized Office Systems

Maybe you've met my Uncle Bob. He owns his own denture clinic. Depending on which day you ask him he'll say he likes his job for the most part. He's very comfortable talking about dentures and working in the lab. But Uncle Bob gets a slight bit of anxiety whenever he has to do some office administration at the front desk. Sometimes I'm sure he would rather deal with his worst patient than talk to his accountant. Uncle Bob has a computer and a year ago he hired a student for two weeks to input all his patient files. Although he has been inputting charges and payments he never really uses the data.

I've been trying to convince him for years that his computer can help him feel truly organized and bring in more revenue. Of course, in response to the last statement he invariably replies that he is already busy enough. I can't argue with him, he is busy. Sometimes he's is in such a state that the last thing he wants is another patient walking through the door. And although Uncle Bob is very busy, he is hardly efficient. With a checklist and a commitment to follow through, he could significantly alter his office life. Uncle Bob needs to start by getting 2 binders, some tab separators, one drawer with 12 folders and then commit to the following checklist:

Beginning of the Month

Management Summary Reports on the previous month

- ✔ **Review Accounts Receivable:** Make a plan to collect and designate bad debts if need be.
- ✔ **Outstanding Claims and Outstanding Pre-Authorizations:** Review the outstanding claims and contact any insurance companies who need prodding.
- ✔ **Billings:** Print the billings for the previous month and ask the computer to sort and summarize by procedure. Put it in the "Financials" binder under the "Billings and Discounts" tab so they can be flipped through and compared with past months.
- ✔ **Discounts:** Print the discounts for the past month and put it in the same binder with the billings report. Remember that if the fees are reduced, it is better to input the reduction as a discount, rather than reducing the fee itself. That way the patient understands they are getting a discount. But more importantly, the discount report can show how much money was forgone due to discounts.
- ✔ **Income Statement:** The income statement will show revenues less expenses for the month. Put it in the "Financials" binder in the "Income Statements" tab.
- ✔ **Marketing Efforts:** Ask the computer to generate a report detailing where patients are coming from (Yellow Pages, a particular ad, referral etc.). File this in the "Marketing" binder.
- ✔ **Post Dated Cheques:** Look in this month's folder for any post dated cheques.

Recall Program

- ✔ **Reminders:** Print the recall reminders list and make a plan to call each patient. Put it in the "Marketing" binder under the "Reminders Recall" tab and check off each patient as they are called.
- ✔ **Cancelled or Missed Appointments:** Ask the computer who has cancelled or missed appointments and who has not rebooked since. Print the list and contact each patient.
- ✔ **Treatment Plans:** Review outstanding treatment plans and ensure no one has been forgotten about.

- ✔ **Mining the Old Data:** There are a lot of old patients Bob never entered reminders for. He can ask the computer any number of recall questions. For example, who has not had a reline or new denture in the last 2 or 4 years.

Daily

- ✔ **Schedule:** Print today's list of appointments and a ToDo list and post in the back.
- ✔ **Input data as the day progresses:** New Patients, Charges, Payments, Appointments. Print the automatically generated insurance claim forms and pre-authorizations.
- ✔ **Input Reminders:** Every time a patient walks out the door check if they have a future appointment booked. If they do not, then input a reminder of when they should be called again based on the service they just had.
- ✔ **Backup Data:** Save a backup of all data onto a CD at the end of the day and take it home so that it is safely off site in case the office is broken into or is damaged.

Weekly

- ✔ **Deposits:** When a deposit is be taken to the bank, print the deposits report from the computer and make sure all cash, cheques, credit cards reconcile. After each category has been ticked, put it in the "Financials" binder under the "Deposits" tab.
- ✔ **Expenses:** Schedule a particular day of the week and have some time specially put set aside to input all expenses incurred this week into the computer. Credit card expenses will be done monthly. Staying on top of this reduces stress and allows meaningful income statements to be regularly printed for review.

Last Day of the Month

- ✔ **Accounts Receivable:** Print this at the end of the day on the last day of the month for an accurate snap shot of accounts receivable. Put this in the "Financials" binder under the "AR" tab.

Quarterly

- ✔ **Dentist Referral Tracking:** Print a report showing all patients referred by particular dentists AND print all patients that the denture clinic has referred to each of these dentists. Put this report in the "Marketing" binder in a separate tab called "Dentists Referrals".
- ✔ **General Referral Tracking:** Print a report of new patient referrals from other patients or friends etc. Put this in the "Marketing" binder in a tab called "General Referrals".
- ✔ **Demographics:** Print a report of all new patients categorized by age and postal code. This report will demonstrate what type of patient is entering the office and help identify the clinic's *target market*. Put this in the "Marketing" binder under "Demographics".

Year End

- ✔ **Print Financials for Your Accountant:** Income Statement, Balance Sheet, and Accounts Receivable.

By diligently following through with this simple check list, Bob will feel on top of his office administration. Reviewing these reports will allow him to easily make important business decisions. As his revenues grow he can quickly ascertain if he should hire an associate or additional office staff to free up his time and further grow his practice. Make a checklist, make a commitment and Bob's your Uncle.

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