



THE POWER OF CENTRALIZATION

Streamlining Practice Management in a Growing
Dental Organization



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SUPPORTING GROWTH THROUGH CENTRALIZATION

Multisite dental organizations can be structured in different ways, often reflecting how they were built. Some are a collection of semi-autonomous operations that share a brand name but little else. Others may share similar business practices but use a hodgepodge of different systems and technology across locations. Many group practices and dental service organizations (DSOs) have discovered the success that comes not only from uniform business processes, but also centralized data and operations, such as shared patient records, provider and patient scheduling, insurance processing and reporting.

Whether your multisite dental organization operates two offices or 200, one of the most powerful steps to improving productivity and increasing profitability is to centralize practice management and data systems — doing so enables you to share data across locations and to streamline key functions. Adopting a shared practice management system can help optimize your organization’s workflows, expand with your growing

needs and give you easy access to the information you need to manage your practice.

However, implementing the right centralized data systems doesn’t happen overnight — it requires thoughtful planning, careful selection and skillful implementation. This eBook draws upon insights from three dental industry leaders who have helped dental organizations successfully transition to centralized practice management and data systems:



• Mike Uretz, founder of DentalSoftwareAdvisor.com



• Dr. Lorne Lavine, a former dentist and president/owner of The Digital Dentist



• Adam McDaniel, director of Product Management at Henry Schein One

Throughout this eBook, these experts share what they have learned through helping multisite dental organizations select and implement a practice management platform that works for their organization, enabling growth through centralization.

DECENTRALIZATION VS. CENTRALIZATION: DIFFERENTIATION AND OPPORTUNITY



“Many of my DSO (dental support organizations) and group clients have grown through acquisition, and when they purchase a practice, it could very well have a different practice management system than the DSO or group uses.” — Mike Uretz

As a multisite dental organization grows, operations frequently become more complex, and communication among staff in different offices becomes more difficult. That additional office you bought out with such high hopes may be operating with an entirely different practice management system than your other offices, which could be limiting your productivity and profitability.

Multisite dental organizations often have a hard time getting offices with disparate systems to work together seamlessly. Unfortunately, this sometimes becomes their norm: They operate in a decentralized system

long enough that they learn to just work around the inefficiencies, despite the challenges that these inefficiencies add to the operating practice. Such inefficiencies may include piecemeal reporting, data duplication and fragmented administration of key functions such as scheduling, insurance processing and billing.

Whether or not growing dental organizations face these challenges, it can be helpful to understand the key differences between maintaining the status quo and moving to a centralized system

Here are **seven key areas of impact**, each of which will be discussed in greater detail on the following pages:

1. Staying on top of key performance indicators, by location and as an organization
2. Implementing standardized business processes across locations
3. Sharing and scheduling providers across locations
4. Streamlining overhead costs for key functions such as insurance processing, billing, scheduling and more
5. Supporting collaboration between providers
6. Sharing records to serve patients at multiple locations
7. Onboarding a newly acquired or newly built office

#1: Staying on Top of Key Performance Indicators

Decentralization prevents practices from receiving and analyzing data that could be critical to managing important decisions in a timely manner.

“Practices will say, ‘I can’t deal with all of these different systems. I can’t manage and make sense of them.’ They want to get all their data in one place,” Uretz says. “It’s possible with centralization to establish and review key performance indicators on an aggregated basis so you’re not shooting from the hip when you make business decisions. With shrinking margins, all growing groups and DSOs need to be able to evaluate centralized data throughout the organization in order to make strategic decisions.

“If they are on different data systems, group practices may have to interpret data from different sources, and it’s extremely difficult,” McDaniel adds. “They try to create similar reports to get the same data, but those reports are very hard to mesh and interpret. I’ve seen offices where it took them several days to get their reporting done. They couldn’t get a report about how their office did on a Monday until Thursday.”

During the COVID-19 pandemic, McDaniel notes, when dental offices were faced with having to make real-time decisions about what sites or services to shut down

or keep open, it was difficult to make such decisions wisely without the right data at their fingertips.

“A multisite practice needs to be able to organize data to make critical business decisions and to improve workflow and other processes. During challenging economic times, it’s crucial to have data that (are) up to the minute.” — Adam McDaniel

Dental organizations on a centralized practice management system can take full advantage of reporting at the organizational level, as well as by location, to manage their operations. A top-down view helps with long-range planning and decision-making, while a bottom-up view is helpful for making day-to-day decisions and improvements.

And with centralization, that information and data are available to organization leaders anytime and anywhere.

Metrics from Micro to Macro

Dentrix Ascend provides financial and business metrics that are easy to view and compile for practice-wide reporting, both for the entire operation and for individual locations. It also enables staff to stay on track with daily goals and activities by creating customized to-do lists, centralizing patient data on one screen and tracking up to 10 insurance plans per patient.

Dentrix Enterprise also features robust reporting capabilities for all aspects of the business. Practices can track productivity and clinical reports as well as claims, payments, Medicaid reimbursements and revenue generation. In addition, Dentrix Enterprise supports Meaningful Use reporting and other types of specialized reporting.

Both systems are designed as unified solutions, enabling users to better understand their practices in real time and to quickly recognize potential problems. Customized reporting also helps practices keep an eye on key indicators to track progress toward organizational goals.

#2: Implementing Standardized Business Practices

Decentralized groups and DSOs can struggle with inefficiency, perhaps duplicating records or having to call different locations to get the most up-to-date information. A key advantage of centralized dental organizations is their ability to manage locations using standardized processes, templates and data. Using the same technology tools across locations is a prerequisite to effective, centralized sharing.

First, Uretz says, “you have to put in new policies and procedures that support centralization.” While this requires some upfront work, it will ensure that your organization is well positioned to take full advantage of the change. As Uretz notes, “With centralization, you can develop libraries and common procedures across offices that will help you accomplish your goals both administratively and clinically.”

The right tools can help organizations build and share templates that support and reinforce the organization’s standardized business processes and workflows. For instance, shared resources might include patient communications such as forms and releases, clinical note templates, referral sources and report templates.

#3: Sharing and Scheduling Providers Across Locations

Many multisite organizations find it valuable to capitalize on their No. 1 resource — their team members — by having them work in multiple locations, but scheduling a provider in more than one office can be challenging. When individual locations have centralized tools to see a provider’s schedule at other locations, however, the process is much smoother.

“Think of the ease of having centralized scheduling,” says Lavine. Patients who call their normal office for an appointment may find the preferred provider is booked solid. However, if that patient is willing to travel across town, they may have the option of being seen sooner at a different location. Thanks to centralization, the office

Setting User Permissions Bolsters Security

To protect patient information, **Dentrix Enterprise** has the flexibility to assign each staff member individual log-in credentials and customized security rights within the software.

Dentrix Ascend also allows users to keep data and business secure by controlling permissions for who can see what and from where.

Both systems enable organizations to give employees access to the data required to do their job while protecting other patient or practice information.

“You can set the systems up the way you want,” says McDaniel. “If you want to flag all payment adjustments over \$50 made by staff, you can do that. You can look at why someone’s posting a \$1,000 adjustment and say, ‘Let me dig into that.’ If you don’t want staff to be able to delete payments, you can set it up for that. And that can be done just once, and it will apply to all locations.”

manager or other team member can view and modify the provider’s schedule at that other office and make the appointment while the patient is on the phone — all without needing to consult with the other office.

As providers work in various locations as specialists or in other functions, they also save time and headaches because they only need to learn one practice management system. Not having to go back and forth between different systems with separate data and workflows minimizes confusion and improves efficiency for all team members.

Metrics from Micro to Macro

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#4: Streamlining Overhead Costs

Without centralization, simple tasks such as submitting insurance claims or scheduling patients' appointments can become costly procedures. This is reflected in both staff time and profitability when employees are operating in silos at different offices, using disparate systems and duplicative processes.

McDaniel has witnessed firsthand the inefficiencies that decentralized group practices experience, especially when they're operating on different practice management systems.

"We'll often see a decentralized practice struggle to operate. Just processing an insurance claim may require their staff to know two, three or four systems. Their processes become so bloated that they struggle to manage them." — Adam McDaniel

Rather than requiring insurance experts at each location, centralized organizations have the option to create a team that manages many or all locations. For example, one multisite organization might choose to consolidate all insurance processing for a 10-site organization, enabling two experts to handle everything — thanks to centralized data — instead of having multiple team members at each location. Or, another growing multisite practice might apply a similar vision: Building a call center in one office to help patients

from all locations connect with the providers of their choice.

An additional benefit of centralized services is that experts for insurance processing, scheduling and more can be housed anywhere, including at home.

#5: Sharing Records to Serve Patients Across Offices

Without a centralized system, organizations may end up duplicating patient records at multiple locations, including for billing, insurance claims or treatment plans. This duplication wastes time and money, forces patients to repeatedly complete forms and may send them a message that you're not well organized — leading them to seek dental services elsewhere.

"Think of having one set of data for a patient. Think of the benefits of having every one of your locations have immediate access to all of the most current information on the patient." — Dr. Lorne Lavine

Having one shared set of patient records has clear benefits when providers are seeing current patients in a new office but still need access to treatment plans, images, health history and more. With a centralized system — resulting in a single, shared patient record — all patient information is right there for the provider's use.

“Another benefit of centralization is the ability to easily route patients and their associated records to specialists at different locations within the organization,” says Uretz. “Often, you’re not going to have a specialist in every location. You can send a referral to the proper place, and specialists can easily pull the patient’s information up.”

Organizing data in one central location as a single solution can help a practice deal with privacy laws as well. “From a HIPAA and security standpoint, it is much better to organize and manage data in one place,” Uretz notes. “If you ever get audited for a HIPAA violation, you have just one place to go.”

#6: Supporting Collaboration Between Providers

McDaniel often sees dentists, specialists and other staff who aren’t sharing information and aren’t able to easily collaborate to provide the best patient care possible. It’s not because they don’t want to; it’s because they are using different systems.

“If you’re not using a centralized system, collaboration doesn’t happen that fast. It’s very hard for staff to collaborate and say to each other, ‘Hey, I was thinking of doing this sort of implant. What do you think of that?’” — Adam McDaniel

With a properly centralized system, providers in different locations can pull up all patient information while they discuss treatment options. This includes the ability to see diagnostic images, treatment history, medical alerts and more.

#7: Onboarding a New Office

Without a centralized system, growing dental organizations can find themselves reinventing the wheel each time they onboard a new practice. Even with uniform standards for running all offices, such policies and procedures can be difficult to convey and implement without shared digital workflows and centralized forms. Not only can this slow down the process of onboarding a new practice, it can also create confusion for patients and staff.

By contrast, a centralized system can set up or onboard new locations more rapidly by using workflows,

Centralized Scheduling and Insurance Processing

The appointment scheduling books within **Dentrix Ascend** and **Dentrix Enterprise** enable staff to schedule and confirm appointments with just a few clicks, regardless of where the appointment will take place.

Dentrix Ascend and **Dentrix Enterprise** also offer tools for submitting electronic insurance claims from a central location. The organization receives payments more quickly and can save time by using specialists across the entire organization, rather than needing them at every site.

templates and reports already employed throughout the organization. Those shared resources can be embedded in the centralized tools for new offices right from the start. If your organization is growing and you want to see it expand as seamlessly as possible, both Uretz and McDaniel say centralized systems and data are critical.

MOVING TO A CENTRALIZED SYSTEM

Any practice owner who has multiple locations that operate in a decentralized way has likely already realized it’s not ideal, especially when locations have diverse hardware and software systems to perform the many functions critical to running a practice smoothly.

“So how do you solve the problem of multiple, disparate systems?” asks Uretz. “Well, you look at how to normalize and aggregate the various administrative, financial and clinical databases into one central integrated database and choose a practice management system for the whole organization that can access the centralized information. This way, every location is working off the same system and data.”

According to Lavine, one of the first things to address when considering centralization is choosing a common practice management system.

“Are your offices operating on different databases rather than one? That in itself is not a good sign,” Lavine says. “It’s much more efficient and costs less to deal with one database versus ... 20 databases for 20 offices. If there’s only one database, you also need to have only one backup.” (And in some cases, the centralized system handles the backup automatically.)

Given the many benefits of centralization, how does a dental organization with decentralized systems make the transition to an efficient, centralized operation? The experts suggest the following:

WHETHER BIG OR SMALL, START NOW

Contrary to popular belief, a dental organization doesn’t have to be a massive operation to reap the many benefits of centralization.

“A lot of people think you have to be a large group practice or have multiple sites to benefit from centralization, but that’s a fallacy,” says Uretz. “Based on my experience helping groups and practices grow through the adoption of software technologies, I’ve found — whether a group practice is large or small — any time you have multiple locations to manage, a centralized approach can be beneficial.”

DECIDE WHAT TECHNOLOGY INFRASTRUCTURE IS IMPORTANT TO YOU

“When you’re looking at your organization, the key decisions you’ll make are about technology and processes,” says McDaniel. “Made properly, those decisions can help you solve a lot of problems. You need to think about how to organize the data that (are) critical to your business decisions and how to organize data to improve workflow processes.”

A dental organization also needs to consider what approach best meets their needs for providing practice management technology for each location. Centralization usually requires choosing one of two paths: wide area network (WAN) or cloud.

Wide Area Network

A WAN is a method of sharing a single centralized database through a central server for access to

scheduling, billing, insurance, collections and reporting. Its multisite logic can manage any number of clinics and workstations with tight security features. Once connected over the WAN, all offices should be securely connected and work together as if they were a single office.

With a WAN, a single server can support dozens and even hundreds of offices on a single unified platform, and each location can be viewed separately or collectively as a single operation.

Cloud-Based Systems



The other option, cloud-based practice management, is expanding in the dental industry. Like the WAN option, many cloud-based systems support sharing a single centralized database and offer centralized scheduling, billing, insurance, collections and reporting. However, with a cloud-based solution, the dental organization does not need to maintain the database on a server. Users access their data using an internet browser. Cloud-based practice management systems allow organizations to access their data anytime and anywhere, enjoying the same user experience whether inside or outside the office.

With a cloud solution, dental organizations typically can reduce their technology requirements. This includes their reliance on a network server in each location, which can be scaled down or eliminated completely, depending on other needs at each location.

Buying and maintaining a server is a business expense, and the costs of this approach should be weighed against the monthly fees for using a cloud solution to achieve similar results when it comes to centralizing operations.

The Importance of Interoperability

Another important consideration is interoperability of practice technology. When selecting a practice management system, it is important to consider what other tools will be connected to the system. “Unless that proprietary software is built to be interoperable, it’s going to be hard to get it all to work together (with other systems),” says Uretz.



Before considering specific practice management systems, a dental organization should consider the other systems that will need to work seamlessly with it. Peripheral technologies such as imaging hardware and scanning systems should be supported. Electronic services for patient reminders, insurance claims and eligibilities, online booking and more should be supported — and would ideally be included. For organizations that use an electronic health record, integration with their dental software may also be essential.

Henry Schein One Solutions

Dentrix Enterprise and **Dentrix Ascend** are practice management software solutions specifically designed to streamline operations, improve efficiency and promote centralization.

Dentrix Enterprise is geared to large dental organizations to help them transition from a single-practice mindset to a multilocation, multispecialty mindset. It lets dental organizations access reports for all clinics with the click of a button. It also allows practices to streamline their operations through centralized scheduling, billing, collections, continuing care, accounts receivable and insurance processing.

Dentrix Ascend is a user-friendly, cloud-based software that is easily scalable and does not require a server, which removes one of the biggest hurdles to a group dental practice growing and increasing revenue. In addition to providing a single patient record and built-in imaging tools, the monthly subscription includes key services like unlimited insurance claims and eligibility checks, patient reminders, online booking, and text or email patient statements. Dentrix Ascend also supports centralized administration of organization functions for insurance processing, scheduling and more.

“Because it is cloud based and scalable, installation costs are minimal and no servers are needed,” says McDaniel. “Adding a new location is more affordable with Dentrix Ascend.”

CONSIDER USING AN EXPERT

Deciding what technology and processes will work best requires dental organizations to analyze their current operations. Looking at the business side should be a regular part of running a dental practice, but it is sometimes difficult to perform an objective, thorough assessment of one’s own business. Thus, an outside perspective can be helpful.

Because experts like Uretz, McDaniel and Lavine have worked with many organizations moving to centralized systems, they may point out additional considerations that you might have otherwise overlooked. “The best thing is for a practice owner to reach out to one of our experts,” says McDaniel. “The choices you make about centralization will depend on your business processes, your plans for growth and your goals. Is your goal to go public and sell to a private equity group? Are you looking to achieve total health dentistry? Are you going to focus on implants?”

Every dental organization’s needs are unique, and an expert can help clarify the options

CHOOSE A PARTNER FOR THE LONG HAUL

When an organization is ready to research practice management systems, experts recommend looking for a software partner with many “abilities.” These include stability, scalability, versatility and flexibility.

Stability

Lavine recommends that his clients use vendors that have proven to be successful and dependable over time — vendors with established track records. “We don’t want our clients to be the first on the block to use a software program,” says Lavine.

Uretz advises: “If you think a vendor will sell you a system (and) then disappear as soon as the ink is dry on the contract, then run from them.”

Scalability

The choice should also take into account the ability of the software partner to grow as the dental organization grows. “You need to look for a company that updates its software,” McDaniel says.

Uretz agrees. When he researches vendors on behalf of his group and DSO clients, he always makes a point of trying to learn about the vendor’s “technical road

map.” This lays out where they are going in terms of product innovation. “Are they committed to creating new features and innovation? Is this a company that’s committed to building new features and functionality? Or are they a company that’s just committed to making a buck?” Uretz asks.

Versatility

The ideal software partner should also be skilled in implementation and support. “Are they going to be a partner that offers coaching, consulting and training?” asks McDaniel.

A dental organization should seek a vendor that supplies high-quality software training, powerful consulting and outstanding customer support. The capabilities of the software are critical, but without high-quality training and responsive, ongoing support, it can be a challenge to effectively use the software to its fullest potential.

That is why it is crucial to determine what training is available, the format of that training and which team members should attend. The same is true for customer support; it is important for dental organizations to know upfront not just how to reach out for support but also what kind of response they can expect when they do.

Flexibility

“One of the things you need to consider when you’re choosing a vendor is what kind of business partner they are going to be.” — Adam McDaniel

Dental organizations should consider the flexibility of their software vendor, which may become clear during contract negotiations. Uretz suggests that dental organizations focus on the contract language as it relates to the technology they are purchasing so there are no surprises. “If they’re not willing to work with you, what kind of partner are they going to be?” Uretz says.

IMPLEMENT WITH FIDELITY

As a dental organization moves toward centralization, a big challenge to consider is how to adapt the mindset of the organization. Leaders will have to figure out how they will train staff who have been working on the same systems for years and don’t want to change. They’ll also need to figure out how to adapt workflows to the new systems.

One of the goals of Henry Schein One, explains McDaniel, is to help clients better understand how their practices are currently operating, where they are failing and where they are succeeding. If needed, the company can work with practices to perform intensive workflow analyses of everything from the revenue cycle to the processes of clinical visits. This can assist with creating workflows that will address weaknesses and bolster strengths.

“We observe staff performing tasks and ask them why they do things the way they do them. We have a lot of expertise to go into a dental office and say, ‘I see how you’re doing a particular task, but here’s a way you could do it better.’” — Adam McDaniel

McDaniel notes that Henry Schein One has helped practices reduce the time it takes to check out a patient from 15 minutes to just 2 1/2 minutes. Efficiencies like these can be found by automating common tasks, setting up shortcuts for others and, most importantly, standardizing these workflows so that each part of the process is done the same way across locations.

Taking Training Beyond

“How To”

One of the challenges of implementing centralization and putting new practice management systems in place is training staff.

“Henry Schein offers remote training for all our products as well as in-person training if you need to have that side-by-side interactions,” McDaniel says.

Henry Schein One also helps practices create a road map to profitability.

“We provide profitability coaching in all aspects of running a practice,” McDaniel says. “We focus on such goals as what you can do with the software to increase patient acceptance of treatment plans, how you can make checking out more efficient so patients walk out with a printed statement and their next appointment, how to create and send an insurance claim, and how to improve collections.”

THE BENEFITS OF CENTRALIZATION

As described throughout this report, dental organizations that centralize can look forward to many benefits, including better data access, uniform business processes, better scheduling capabilities and faster onboarding of new locations.

IMMEDIATE ACCESS TO SHARED DATA

Dental organizations preparing to centralize should consider what it would be like to have all the data at their fingertips to successfully run a multisite dental organization. Consider how useful it would be to know how long a patient's wait time was, how long a clinical procedure took or how shared data are helping the organization track insurance claims, improve collections or increase patient acceptance of treatment plans. Think of the convenience of accessing patient records from any location.

UNIFORM ORGANIZATION PROCESSES

Major efficiencies are possible as the repeated tasks of running a practice become not just centralized, but also standardized. Processes can be managed the same way regardless of location. With centralization, every patient record, clinical image, billing record and other detail can be handled the same way, and staff with access to shared templates for clinical notes, patient communications and more will need to be trained only on a single way of doing things.

FLEXIBLE SCHEDULING

After centralization, team members remain a dental organization's most valuable asset. This value is magnified with the ability to easily assign and schedule providers across locations — all of which is visible to team members at every location. Patients can be seen at the location most convenient to them or be easily referred to an in-group specialist.

ONBOARDING MORE LOCATIONS AND FEATURES

Centralized management platforms also make it easier to onboard new locations. With one shared solution — aligned to the dental organization's processes, workflows and templates — the pieces can fall into place more quickly for a new location. The

same goes for enhancements to processes, workflows and templates. After piloting new processes and technologies at one location, an organization can smoothly roll them out across the entire organization. This also allows for faster implementation, makes it easier to train staff and enables the organization to pivot more quickly when making changes.

SAVINGS THROUGH SPECIALIZATION

Centralizing the management of a growing dental organization also allows the organization to realize savings through specialization. A centralized platform means all billing, insurance claims and other financial communications can be handled in a consistent manner. But the benefits go beyond that: with a centralized operation, all revenue-related activities can be easily managed from a single hub. This allows specialists to manage the financial aspects of all the practices in the group, reducing or eliminating the need for specialists at each location. Similar savings are possible in other areas such as scheduling and patient contacts.

Standardized Charting and Case Presentation

Charting and reporting features in **Dentrix Enterprise** allow providers to see what treatment plans are outstanding so they can follow up with patients and encourage them to schedule a pending treatment, helping the practice access untapped revenue. Dentrix Enterprise allows clinical staff to enter the necessary treatment plan and easily show and discuss it with patients using color-coded visuals that are easy to explain and understand. At the same time, administrative staff can also see the plan, enabling them to provide a cost estimate and schedule the patient for an appointment.

Dentrix Ascend is just as useful on the clinical side. It features customizable displays with clinical charts that include procedures, conditions and clinical notes for each patient. Another tool lets users easily store, share and attach clinical images to patients' cloud-based records and view them with the chart. A treatment planner feature lets users design plans for patients and then track acceptance, scheduling and progress.



SETTING UP FOR LONG-TERM SUCCESS

Many practice owners who have multiple locations or are in expansion mode possess an entrepreneurial outlook and a proactive business mindset. For those looking at the best ways to enhance the success of their dental organization, centralization is a logical and forward-thinking step.

Although centralization comes with upfront costs, it is a long-term investment that will pay off as inconsistencies and redundancies among offices are resolved. As offices begin to operate as one, a dental practice will reap the rewards as it saves both time and money through increased efficiencies. In the long run, centralization supports the success of the dental organization's leaders, clinical and administrative staff — and, ultimately, the patients they serve.

Henry Schein One offers two practice management solutions to support your growing practice: Dentrix Ascend and Dentrix Enterprise. Both provide numerous ways to help centralize and streamline your organization across locations, from shared data and uniform templates to interoffice scheduling and systematic reporting.

Moving toward centralization might seem daunting, but you can't afford to miss out on the opportunity for increased efficiency and profitability. To learn more about how Henry Schein One can help, call 844-223-2216 or visit DentrixMultisite.com today.

How Henry Schein One Can Help

Both **Dentrix Enterprise** and **Dentrix Ascend** from Henry Schein One offer ways to centralize your growing practice.

Dentrix Enterprise:

- Customizable server-based system
- Designed for large practices
- Single database for all patients and providers
- Advanced security roles

Dentrix Ascend:

- Cloud-based software
- Access records anywhere, anytime
- Role-based dashboard
- Monthly subscription instead of high upfront costs

Call 844-223-2216 or visit DentrixMultisite.com to find out which solution is right for your organization

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