



CREATING A TOUCHLESS PATIENT CHECK-IN AND CHECK-OUT

**PROVIDE A SAFER EXPERIENCE FOR PATIENTS
AND HELP PROTECT YOUR TEAM**

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ABOUT THE AUTHOR



DAYNA JOHNSON

Dayna Johnson loves her work. With more than 25 years of experience in the dental industry, Dayna’s passion for efficient, consistent and secure systems is grounded in personal understanding and professional expertise. With a direct, pragmatic approach, Dayna helps clients develop standardized protocols for all practice management systems.

More than 25 years experience in the dental industry

Seeing a need in the dental industry for more resources, she founded Novonee® – The Premier Dentrrix Community in 2016, and helps cultivate Dentrrix superusers all over the world. Dayna knows that your entire day revolves around your practice management software and that the more you learn, the more productive and stress-free your office will be.

When she is not training, speaking or writing an article, Dayna enjoys spending time in the garden, golfing and hiking in the Rocky Mountains. Dayna is a total foodie, and when on the road, searches out local restaurants to support the local economy.

CONTENTS

THRIVE IN THE NEW NORMAL WITH BETTER, SAFER PROCESSES	4
Technology Can Help	4
Where to Start?	4
USE YOUR WEBSITE TO SHOWCASE YOUR PERSONALIZED SERVICE TO NEW PATIENTS	5
Book Appointments While You Sleep	5
Creating an Emotional Connection	5
What Success Looks Like	5
A SEAMLESS WORKFLOW FOR THE VIRTUAL CHECK-IN PROCESS	6
Automating Tasks Cuts Wasted Time	6
Offer Convenience With a Patient Portal	7
Everyone Wins	7
DISCOVER SOLUTIONS FOR TOUCHLESS CHECK-OUT	8
Make It Easy for Patients to Pay	8
Improve Your Cash Flow	8
EASY ACCESSIBILITY OF PATIENT INFORMATION	9
A Patient Portal Makes It Possible	9
Getting Information After-Hours	9
A Digital Workflow Enhances What You’re Already Doing	9
SEIZE THIS OPPORTUNITY	10

THRIVE IN THE NEW NORMAL WITH BETTER, SAFER PROCESSES



The year 2020 will go down as the year that changed the dental industry.

COVID-19 redefined how you and your team do your work — from the moment a patient arrives to when they leave. More than ever before, patients are concerned with their health and safety during their visit. Is everyone wearing a mask? Are physical distancing protocols being followed? Is physical interaction minimized with others as much as possible? Your practice needs to reinvent itself with additional health and safety protocols to maintain or establish trust with patients.

Technology Can Help

Change can be challenging, but technology can help you innovate and adapt to your new reality. Technology helps you implement new and better contactless check-in and check-out procedures that simplify your workflows and create positive experiences for your patients and team. As your team becomes more productive, and your patients see that you care about their health and safety, you will be able to thrive in a more competitive business environment.

Where to Start?

It might be challenging to know where to start, or to understand how all the pieces work together. Dentrux and Henry Schein One are here to support you and simplify the process.

This eBook will help you create a seamless workflow for your patients and your team, from check-in to check-out and beyond, as you find ways to incorporate more touchless points. We'll visualize this journey together, including using your website to reach patients in the best ways, automating manual tasks, offering more ways for patients to pay (including more touchless options) and using a patient portal so patients have 24/7 access to their records or to make payments. We'll also show how technology solutions such as Dentrux Patient Engage, Dentrux Pay and QuickBill work seamlessly with Dentrux to help your practice flourish in the new normal.

USE YOUR WEBSITE TO SHOWCASE YOUR PERSONALIZED SERVICE TO NEW PATIENTS

The new patient experience is directly tied to the personalized and caring attention your practice puts into your online presence. This is a real opportunity for your practice to shine!

When a new patient searches Google and finds your practice, the practice brand and reputation is on full display. The new patient is mentally adding up what they like or don't like about the practice, the team and the services available until they eventually decide to schedule.

So, what is a new patient looking for?

- An easy-to-navigate practice website
- The ability to book an appointment online
- Prompt communication from the office
- The ability to communicate at their convenience

Creating an Emotional Connection

It's a win for everyone when you can use tools like [Dentrux Website](#) to easily create a polished office website that connects emotionally with a potential new patient. Even while the office is closed, the patient can go ahead and schedule their appointment.

People are online more than ever. When you make it easy to navigate your website, schedule an appointment and fill out forms, you will make a great first impression on the patient.

What Success Looks Like

Visualize it: You turn on the computer in the morning to find new patients in the appointment book and forms waiting to be uploaded into the database. It can happen when your practice has all the technology pieces in place.

At this point, you can thank the patient for scheduling and send any information they might need before their appointment. This would also be a good time to send patients a link so they can create their online portal. People want to feel connected to their health care providers, and the [Patient Portal](#) will allow the patient to send secure messages to their doctor and connect with the office.

With the ease of your practice's online booking, electronic forms and automated communication, the new patient will be bragging to all their friends and family about how amazing the experience with your practice has been ... and they haven't even walked in the door yet.

This is just one example of how your technology tools like a patient portal allow you to do more in a touchless way while actually providing higher-touch service. New and current patients alike will thank you for it.



Book Appointments While You Sleep

[Dentrux Online Booking](#), an add-on to Dentrux Patient Engage, provides a convenient way to fill your schedule. Online Booking works in real time with your Dentrux Appointment Book. Through your website, new and continuing patients can book appointments at their convenience 24/7.

You control access to your schedule, provider and operator availability. Patients only see the appointment slots and providers you allow. It's a simple way to increase productivity without lifting a finger.

A SEAMLESS WORKFLOW FOR THE VIRTUAL CHECK-IN PROCESS

Everyone on your team has many responsibilities, so you need tools to help your team be more efficient.

For instance, your front office team must make sure the schedule is booked for an ideal day, double-check that each patient's insurance is still eligible, confirm any patients who have not confirmed through the automated system and make time to compile all the management reports. And in 2020, with all the new policies and procedures that need to happen before the patient walks in, the task list just got longer.

Automating Tasks Cuts Wasted Time

Using technology to automate some of these tasks will give time back to your team so you can focus on more important projects.

The check-in process includes several tasks your team must accomplish before to the patient's arrival. **Dentrix Patient Engage** and **Dentrix Insurance Manager**, two add-on services for Dentrix, help save your team time by automating many of these tasks:

- Use Dentrix Patient Engage to send the patient an automated email or text with instructions about how to follow the new office protocol. You can customize this automated communication with the your practice's branding and message.
- Invite the patient to create a log-in to the Patient Portal, where they can fill out an updated health history form and the new screening form.
- Use the Insurance Eligibility module in Dentrix Insurance Manager to verify benefits information for the patients who are scheduled seven days in advance, giving the front office team the most up-to-date benefits information without having to call each patient before their visit. With additional time back in their day, the front office team can then focus on reaching out to patients ahead of time who might not have active insurance eligibility.
- On the day of the appointment, use the Check-in feature in Dentrix Patient Engage to send a two-way text to the patient with last-minute instructions upon arrival. If the patient has not yet completed their online forms, the check-in feature can send the patient a link to fill out an updated health history or pre-appointment screening form.

Imagine a future with no more time wasted waiting for the patient to fill out forms in the waiting room, which can potentially make the clinical team late for the next appointment. When your team can collect and update all the information before the patient walks into the office, without it being a time-consuming and tedious manual process, your schedule will stay on time, and your whole team will be more prepared, efficient and productive.



Offer Convenience With a Patient Portal

The typical dental practice is only open 32 hours a week, with hours similar to those of patients' jobs. This means most patients will wait until after-hours to check personal email or text messages. With the **Patient Portal** in Dentrix Patient Engage, patients can check in for an appointment, fill out forms, send a message or check appointments — all from the comfort of their home and on their schedule.

This is all good for the tech-savvy patient, but what about the patient who might not own a smartphone or computer? What about the older patient who might need a little extra help filling out online forms? There are a few options.

- Ask patients if there is a family member or caregiver who might be able to help them complete the online forms. The link to the electronic forms can be sent by email, or the patient could share their log-in information with someone.
- The patient could fill out the electronic forms via a kiosk in the office, using an office workstation or an iPad.
- If neither of these options will work, someone in the office could interview the patient and fill out the forms in order to save time and keep from having to print and scan the forms.

The Patient Portal offered by Dentrix Patient Engage is just one of many ways that you can leverage your technology to create a seamless workflow. These integrated tools in Dentrix make it simple to offload or automate tasks that both lighten your team's load and give patients more of the convenience they want.

Everyone Wins

Dentrix helps both patients and the dental team to have the best experience.

Patients want to . . .

- ✓ Feel more connected to their doctor
- ✓ Send their doctor a secure message
- ✓ Look up family appointments 24/7
- ✓ Not have to fill out a stack of paper forms at their appointments

The dental team wants to . . .

- ✓ Have more time to spend on critical daily tasks
- ✓ Be able to send the patient secure information without worry
- ✓ Check insurance benefits quickly and easily
- ✓ Find everything they need in one location

The great news is everyone can have what they want! Dentrix software and Dentrix Patient Engage can make it easy to create the best outcomes.

DISCOVER SOLUTIONS FOR TOUCHLESS CHECK-OUT

When you implement Dentrix Patient Engage and its electronic forms’ functionality, you remove the clipboard, paper and pen from check-in. But how do you automate the check-out process to provide more efficiency and safety? Dentrix offers touchless check-out solutions that improve your cash flow and help patients feel more at ease as they leave your practice.

Improve Your Cash Flow

Dentrix includes payment processing functionality giving your team the ability to implement a touchless check-out process that allows for easier patient payment processing, patient financing and electronic billing.

Payment Processing

Dentrix Pay (available to Dentrix 7.2 users and above) enables a faster and safer check-out as you process credit, debit and chip (EMV) cards as well as contactless payments such as Apple Pay or Google Pay.

Additionally, Dentrix Pay allows your practice to store credit card information on file, allowing the office to run the card automatically for a payment agreement, including previous balance payments or copays. The Dentrix Pay system comes with a built-in consent form for the patient to give verbal or written authorization to run the card on file. Having a card stored in Dentrix makes it easy for patients to pay and greatly streamlines collections.

Patient Financing

When you offer financing to patients, you enable them to get the treatment they need while it helps keep your revenue constant. Dentrix and CareCredit have a built-in integration for users on Dentrix 7.1 and above. The office now can process a transaction or refund through CareCredit without ever having to touch the card.

More than ever right now, patients are looking for options to spread out payments over time. With the CareCredit feature, your office can even process a new application without a paper form or having the patient touch the computer.

These new payment solutions will give both patients and your team a greater feeling of safety, and your team will also appreciate how integrated tools help give them increased efficiency and productivity. When you strengthen the relationship between you and your team — and your team and your patients — you position your practice for growth and success.

Make It Easy for Patients to Pay

Listen to your patients: They want convenient payment options, including being able to look up their balance and pay online.

Here’s another way you can use your technology to create more touchless procedures that actually offer higher-touch service: giving patients a way to pay from home — day or night.

Offices on Dentrix 7.3.1 or above can send an electronic billing statement to the patient’s email inbox with QuickBill Email Statements. Patients can simply click the Pay Now button and be taken to a secure site to enter credit card information. Within Dentrix, the payment automatically posts to the ledger.

QuickBill also lets you send paper statements to patients who don’t use email. QuickBill makes it easy to batch and automatically generate and mail printed statements as often as every day to pick up any missed copays or as an instant walk-out for the patient at the time of service. Sending statements right away helps resolve balances quickly so you can get paid faster.

EASY ACCESSIBILITY OF PATIENT INFORMATION

The payment issue has been resolved. What else gets passed between your front desk team and the patient at check-out? Appointment cards, treatment plans or referral slips. Your technology gives you opportunities to do many touchless tasks far beyond collecting money.

Getting Information After-Hours

During the check-out process, the patient might want to receive an electronic version of their treatment plan to save paper or send to another party. Patients might also want to access a referral on their mobile phone, so they don’t have to worry about losing it. You can offer all of this with the Patient Portal in Dentrix Patient Engage.

Being able to access their patient record after-hours can be a lifesaver for many people. Just knowing that patients can reach out to their dentist helps build a strong relationship and will help grow referrals from your happy patients.

Of course, if your patients are able to get information on their own, it again frees your team up from routine tasks like hunting down information in paper charts. Then staff can focus on that excellent patient experience you want to provide.

A Digital Workflow Enhances What You’re Already Doing

Does offloading tasks to a computer feel impersonal? Creating a digital workflow does not mean losing the personalization of your practice. It simply means giving patients the convenience they want while freeing up staff time to focus on the most important tasks — tasks that generate revenue and build lasting patient relationships.

Creating a digital workflow automates time-consuming chores to enhance the personal touch your office provides patients and offer a better outcome. The result is happy patients and a more productive team.



A Patient Portal Makes It Possible

An online **patient portal** gives both your team and your patients everything they are looking for.

Benefits of a patient portal for the patient’s family . . .

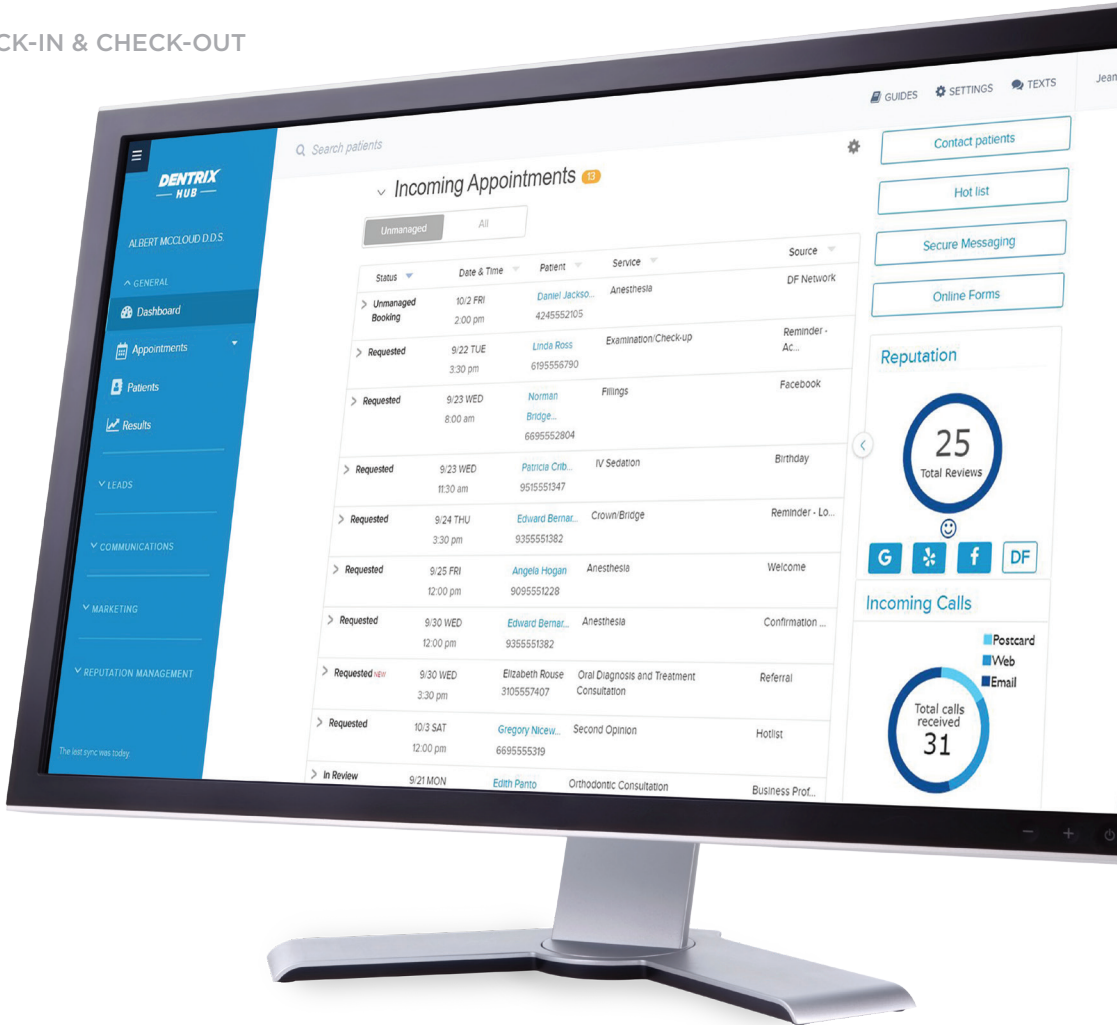
- ✓ Send the office a message after-hours
- ✓ Check on the whole family’s appointments without calling in
- ✓ Update family information

Benefits of a patient portal for the practice . . .

- ✓ Message patients after-hours on the phone
- ✓ Receive updated family information automatically
- ✓ Download health history updates

Dentrix Patient Engage helps you stay in better touch with patients by giving them a convenient patient portal where they can securely access and update their personal information.





Dentrix.com/Touchless
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SEIZE THIS OPPORTUNITY

With the events of 2020, we each have been given an opportunity to take a step back and look at how we have done things in the past — and decide what’s best for the future. Even though many of us are out of our comfort zones right now, that’s not all bad. This is a chance for your practice and team to grow and become even better.

Your technology tools are the key to change and improvement. As you use your Dentrix practice management system and integrated tools like Dentrix Patient Engage, Dentrix Online Booking, Dentrix Pay and Dentrix QuickBill to create opportunities for more touchless procedures, patients will benefit from the convenience and higher-touch service. At the same time, your team will be freed up from spending hours on routine tasks like making reminder calls or confirming appointments over the phone.

Current patients will be grateful for the upgrade in service, and new patients will be impressed by your office before they even walk through the door.

Change may feel intimidating sometimes, but Henry Schein One is here to help you with the right tools, supporting you as you create your best practice that addresses today’s needs and challenges. To find out more about any of these tools and how they can help you provide a better patient journey while being more efficient,

Visit our website here or talk to a product specialist at 833.228.9414

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