A new software program will not attract more new patients to your practice.

I advise doctors to do their research and be patient before they jump the gun and believe that purchasing a new program will solve their problems. If the practice is on a tight budget, look closely at all aspects. Quite often I’ve consulted with young doctors who are considering a software purchase without truly exploring their current software capabilities. In fact, I recently consulted with one who thought he was not able to obtain management reports. The truth was he wasn’t trained to use the software. Changing programs is costly and stressful so make sure you are prepared to make an educated decision. The following is a list of items and questions to consider:

- Assess your current system. What would you like to change about it? Create a list. Contact someone who knows the system well for their input.
- Go with a company that has a proven track record in orthodontics. It takes time to work out the kinks in any software program. The companies who have continued to grow and keep customers happy are your best bet.
- Narrow it down to your top two choices and compare the cost and benefits.
- Involve a knowledgeable IT person in your decision making. An expert

by Charlene White

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recommendation on hardware selection is essential.

- Talk with your CPA to discuss the tax ramifications and best terms to consider.
- Decide if a cloud-based system or a server system would be best for your practice. A multiple location practice normally benefits from a cloud based system.
- Research how well other software programs integrate with your new practice management software. For example, imaging, auto payment, 3-D X-ray, patient confirmation, electronic insurance claims, iPad, etc.
- Review the reports that are easily available for daily and monthly operations. Request a live demo. Sit at the keyboard and walk through the steps to get a real feel of how the day to day operations flow.
- Ideally, visit an office or two who uses the program. Observe how well the system works for them. Talk to the team members who use the software daily.
- Ask to see the following reports that support new patient tracking and case acceptance statistics:
  - New production monthly
  - New collections monthly
  - Insurance and patient accounts receivable over 30, 60, 90+
  - Active patients with no appointment
  - Recall patients with no appointment or recall
  - Daily adjustments seen on the day sheet. Deposits should match the day sheet.
  - Embezzlement prevention factors
  - Tracking of referral sources
  - Ease of going totally paperless
  - See if there is a big picture management report
- Review the questionnaire and letter capabilities
  - Are there any statistics that are compared to the previous year in the same time frame?
- Review how scheduling templates are created and changed.
- Review the options for staff daily operations: “To Do” list, intra-office messaging, payroll time clock, etc.
- Review the email and text capabilities for patients and referring office.
- Review HIPAA-compliant standards

**Initial training and on-going support**

Ask for a detailed outline of what will be accomplished during the week of training and installation. Quite often doctors are disappointed in the training process. Be proactive and outline your expectations in advance.

Within 90 days of going live, hire an independent expert on the software or the “best” trainer from the company to come and train for one or two days.

Review what training and support is available on the company’s website. If you call in with a question, what is the average wait time and/or turnaround time?

Conversion of data is often messy and stressful. Discuss this in detail to make sure expectations are clear on both sides. Extra administrative help is beneficial during the conversion.

Discuss all the maintenance fee options. How long does the contract remain in place? Are there options to upgrade or downgrade? Find out if off-site back-up services are available.

Review and compare the cost of the software fee options. Contact your CPA and discuss which finance option would be best for you.

Ask to see a list of software updates presented at their last user meeting. It is important to select a company that is highly innovative in today’s fast paced market.

It is well worth the effort to do your research prior to purchasing software and hardware for your practice as it is one of the larger investments you will make. Switching systems can be stressful and costly.

The goal is to use your software as a valuable management tool. I recommend establishing a long-term consulting relationship with an expert who fully understands the software you choose for your practice.