Avoid the Pitfalls of Creating a Chartless Office

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A Little Background

The digital chartless office, although not a new concept, in recent years, has become the industry standard. Since 2006, 97% of all offices I have assisted with purchasing digital components have elected to go chartless.

Creating a chartless office comprises of two major components: practice management software for the front desk and digital applications that manage patient’s images, odontogram and clinical notes.

The dental industry has seen major changes, both at the front desk and in clinical applications. First, it was the transition from paper appointment books and typewriters to a computer with a digital schedule and the ability to create invoices; these programs became known as practice management software. These applications, for the most part, were standalones exclusively designed for the front desk. Clinical applications for use in the operatory such as perio charting and a digital odontogram were also beginning to appear on the landscape. Once again, they were generally standalone programs that did not integrate with their practice management counterparts. The era of the chartless digital office really came to be when practice management software was able to communicate with digital odontogram software.

There are many questions when it comes to creating the chartless office, what follows are the answers to some of the most common asked.

Where to Start?

This is by far the number one question that comes up when dealing with an office that is contemplating a chartless environment. With so many items to consider such as, software for practice and image management, retaining digital clinical notes and odontogram and all the associated hardware, it is easy to see how people can become overwhelmed with all the choices.

Answering the question of where to start depends on where you are currently in the process of going chartless. Keeping this in mind, the number of scenarios is too numerous to discuss in this document, but here is a general overview in Table 1.
### Table 1.

<table>
<thead>
<tr>
<th><strong>Where you are in the process</strong></th>
<th><strong>Where to start</strong></th>
<th><strong>Explanation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Paper appointment book and paper charts.</td>
<td>You should begin by researching practice management software.</td>
<td>You do not want to overwhelm the existing staff with too much technology so introduce technology slowly.</td>
</tr>
<tr>
<td>Practice management software and paper charts.</td>
<td>Talk to your practice management software company to determine if they have an integrated chartless solution.</td>
<td>Keeping your software needs with one company not only creates more efficiency, but also less headaches.</td>
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<tr>
<td>Practice and image (digital X-rays) management software with paper charts.</td>
<td>Without question, talk to your practice management software company first. If their solution is not integrated, start shopping around. (Integration is explained later on in the article).</td>
<td>You are primarily looking for a digital odontogram; a main feature of the software should be that it creates invoices within the practice management software environment.</td>
</tr>
<tr>
<td>New office</td>
<td>Practice management software</td>
<td>Although you have a long list of purchases ahead of you, selecting this software first will actually help you make decisions on several other components such as X-ray sensors and computer hardware.</td>
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You will notice in Table 1, in each example of where to start, practice management software is mentioned; the reasoning behind this is quite simple. In today’s digital dental office environment your practice management software is essentially the hub of all activity. The careful selection and maintenance of this product can dramatically increase efficiencies in the office and reduce personal and environmental stress.

Having stated the above, the absolute first place to start is with your staff. Dedicate one of your office meetings to the discussion of going chartless.

### Getting the Staff Onboard

This is one of those pitfalls that hits you on the blind side. You have made the decision to go digital, you have purchased all the necessary components and then you sit down to tell the staff that you’re moving forward with this “digital office” concept. Without warning, one of your staff members begins to act strange (more than usually) and in some cases, can create a stressful environment for everyone involved in the transition. More often than not, it is generally staff members who have been with the office over an extended period of time. The three most common observations about these employees are they are set in their ways; they are not comfortable with new technology or they are simply unwilling to move forward into the digital era. The following steps may help you avoid this situation:

1. Even before you go out and begin to investigate the components to create your digital office, take the time to talk to the staff openly about the new direction you are heading.
2. Listen closely to their concerns, addressing each one with care and compassion.
3. Reassure the staff that the additional effort required to implement the chartless office will be well worth it. The office will become far more efficient and less stressful.
4. Offer additional training for staff members that have a phobia about technology.
5. Update the staff throughout the process. The more they understand about the process, the less shocking it will be to them when you begin to implement.
6. Be proactive. Schedule sufficient training time so that each staff member becomes familiar and comfortable with the new technologies.

Although I would like to say in every case, the disgruntled staff member becomes an intricate part of the digital office, it simply does not happen. Some people are not comfortable with technology and struggle to embrace it. There may come a point when you need to make the very difficult decision regarding the employment of that particular employee. Here are several steps you can take to avoid major headaches when having to decide whether to let an employee go:

1. Be sure to update all job descriptions in the office to reflect the additional duties and tasks associated with a digital office.
2. Additionally, update any policies, procedures, or protocols.
3. Introduce these updates to each staff member making sure they have read and understand the changes.
4. Finally, update your performance review sheet to match the job descriptions.

These steps will ensure that your staff are well informed of their new duties. Should the situation arise to dismiss an employee, you can rest assure that you have the proper documentation to support it.

Integration vs Bridging Image Software with Practice Management Software

This pitfall is usually realized when it’s too late, generally after the installation of software and hardware.

Always insist on having integration over bridging. Integration of software is far more efficient and less cumbersome than bridging. Bridging usually requires an additional step or two in order to utilize that software. Furthermore, proper integration creates more time or more profit for your office.

There are many companies and sales representatives providing skewed information regarding this topic. To serve their own needs companies with standalone software will present one or more of the following traits to entice your purchase, none of which are substantial enough to sway you from purchasing integrated software.

1. Their software is superior — although there are some variances in quality, most quality name brand products will provide consistent quality.
2. Their hardware will not work as well with the competitor’s integrated software — in many cases the hardware works just as well with other competitors’ integrated software solution. If you like their hardware, encourage them to speak with your selected software company to integrate their hardware.
3. They cannot support it — this statement is absurd. If you purchased a product from them, they must support it. The company you purchase the hardware, services and software from will support their particular product.

If your current practice management software does not integrate with any image management software on the market, there are two options; find the best suitable product to complement your current practice management software or begin shopping for a complete digital software solution with proper integration.

Holding on to Paper

You’ve heard the expression “tree hugger”; in the dental industry there are a lot of chart huggers … actually, a lot of paper huggers in general. Going digital can be a very stressful time for people with this mindset; remember there are many offices out there that are completely on paper — appointment book, charts and invoices. No matter what level you are at regarding paper, leaving it behind can be very traumatic. How you choose to move from paper to the digital environment is as varied as each office on this planet. The main point I want to make regarding paper is always stick to this golden rule:

“Once you move from paper to digital, you can’t go back.”

Here are a few examples:

Once you stop using the paper appointment book, throw it out. Many offices will keep it as a crutch only to experience disaster, because they run two systems at once — this method will fail.

Once you stop using paper charts, archive them. Use them exclusively for historical information and place all information in the digital chart.

Myths

Paperless vs. chartless

I thought it would be appropriate to cover this myth first as we spoke about holding on to paper in the previous section. Many people throughout our industry seem to think these two words paperless and chartless synonymous; they could not be any further from the truth. In a digital office, you can create a chartless environment, one that no longer has a chart (regardless of the material paper or plastic) to place notes and X-rays in. All information relevant to a patient is kept digitally within the computer.

Conversely, a paperless office would mean that there is no paper. The word paperless can be very stressful to a paper hugger and the fact is your office will continue to produce volumes of paper such as invoices, statements and treatment plans for some time to come in the digital chartless office.

Myth busted — you can have a chartless office, but it is highly unlikely you will have a paperless office.
What do I do with the paper charts?  
This is one of the crazier myths and it definitely can consume a huge amount of money and time. This myth usually comes in the form of bad advice. When you choose to go completely chartless, the question comes up, “What to do with the paper charts, more specifically, the content within the paper chart?”

The answer, myth — you have to scan each piece of paper contained in the chart into the computer and place it into the digital chart. This could not be any further from the truth. Imagine the immense amount of time and effort it would take to scan 3,000 charts of the 25-year-old practice into the computer.

Myth busted — the day you decide to go chartless, simply archive all of the paper charts and their content.

Occasionally you will refer to information from a chart. Simply pull that particular chart, retrieve the information and place it back in the archive. Some offices will scan a particular document, such as the treatment plan from each chart to further reduce the need to handle the paper charts.

Old staff can do this  
Well first of all, what do you consider old? The digital world, in particular a personal computer, has been a part of our daily lives for the better part of 25 years. That means, almost anyone that is in the work force today, has had enough exposure to technology to be able to move forward in a digital chartless environment. Having said that, there may be a few renegades out there that haven’t had much exposure to computers. If the staff member is willing, always keep in mind, you are never too old to learn.

Myth busted — I have seen many older staff members not only understand, but excel in the digital chartless environment, outperforming considerably younger staff members.

Summary

As you move towards creating a chartless office, remember to provide enough resources such as time and money to this project. The results of a well-designed and maintained digital chartless office are quite obvious. They are far more efficient than a paper office and contribute to a less stressed office environment.