



## As Demands in the Orthodontic Market Continue to Evolve, Innovative Software to Improve Workflow is Paramount

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### THE ORTHODONTIC MARKET CONTINUES TO EXPERIENCE RAPID GROWTH, WHICH PRESENTS NEW CHALLENGES TO PRACTICES

Increasing pressure on the price of treatment, a rising number of teen and young adult cases and new treatment options, such as clear aligners, to name just a few. Competition for prospective patients has only become more intense as practices seek ways to rise to the challenge and stand out with enhanced marketing strategies and elevated patient engagement.

However, it's never enough to simply get patients in the door; to truly standout, orthodontic offices need to offer a streamlined practice experience and superior patient care. Providing those things often comes down to practice workflow—the behind-the-scenes best practices and activities that make an office run smoothly. Practice workflow can't be enhanced with the flashiest marketing or the coolest rewards program, but the most efficient practice management software. Fortunately, there are several

ways that practice management software could be used to improve workflow and thus address some of the growing trends in the industry.

### TRACKING CLEAR ALIGNER TREATMENT

Clear aligner treatment has become one of the ways for orthodontic practices to distinguish themselves in a competitive field. Aligners require shorter appointments and less chair time, which appeals to teens and young adults seeking orthodontic care.

The screenshot displays a patient's record for Billie Smith. The interface includes a patient profile, medical alerts, and a treatment history section. A prominent feature is the 'Aligner Tracking' tab, which shows a progress bar for 'Upper Tray' and 'Lower Tray' treatments. The progress bars indicate the status of each tray, with green bars representing 'Delivered to Patient' and yellow bars representing 'Tracking'. The 'Upper Tray' section shows a progress bar from 1 to 20, with the first 10 trays marked as delivered. The 'Lower Tray' section shows a similar progress bar. The interface also includes a 'Today's Appointment' section with a procedure for 'Adjust 3U' and a 'Next Appointment' section. The 'Aligner Tracking' tab provides a clear visual overview of the patient's aligner treatment progress.

THE ALIGNER TRACKING TAB IN THE NEW TREATMENT CARD ALLOWS CLINICIANS TO SEE AT A GLANCE WHERE ALIGNER PATIENTS ARE IN THEIR TREATMENT.

In addition, several manufacturers market their aligners directly to consumers, which means patients come into the practice asking for them by name. However, while offering clear aligner treatment can certainly make a practice more attractive to prospective patients, tracking aligner treatment can be cumbersome. Although some aligner manufacturers provide propriety tracking software, it often doesn't integrate with a practice's management software, so clinicians must exit one platform to track treatment in another. It can be even more of a hassle for offices that treat multiple patients using different aligner brands, as they must learn multiple workflows. Whether using one brand or many, practices struggle to track aligner treatment typically

though some form of inconsistent note writing or ad hoc reporting in their practice management software, which can create workflow inefficiencies, redundancies and variation across the practice.

*"Most important, simplifying aligner tracking keeps doctors from wasting valuable time hunting data and gives them more time to focus on the patient and their care."*

To combat this pain point—and to provide orthodontists and their patients with flexibility in their treatment options—there is a need for clear, consistent aligner tracking. Instead of looking through treatment notes and one-off reports, it's critical that universal aligner tracking is available directly within the clinical chart so doctors and staff can access a thorough visual overview of the treatment pathway and progression of aligner patients. By centralizing the information most important to aligner treatment, users can confidently identify which tray a patient is currently wearing; how many trays were sent home; the progression of treatment; and whether the patient is in refinement. Improving the software experience by adding universal aligner tracking eliminates the need to scroll through months of treatment notes or switch between software applications. This quick, high-level overview of which trays are needed for the day could even streamline workflow for multi-office orthodontists, as it's clear which trays are needed for the day at which location. Most important, simplifying aligner tracking keeps doctors from wasting valuable time hunting data and gives them more time to focus on the patient and their care.

Easy-to-access universal aligner tracking also gives other team members more confidence when interacting with patients. For example, if a tray is lost or a patient has questions about treatment, the front desk staff can easily navigate clinical

The screenshot displays a patient insight panel with the following data:

Appointment Compliance:		No Show	0	Broken Brackets	0
	Cancelled	5		Wires	0
	Changed	2		Lost Appliances	0

Notes:

700 - Debond U/L, 404 - Insert Hawley, 703 - Del Bonded 3-3, 204 - Records Final

Notes

RB L DEL L3-3 U HAWLEY FINAL RECORDS  
NA: CK RETS, take final pano, I forgot to take it at rd

13 AS: (6) MC, DR: (1) JS

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A FEATURE OF THE PATIENT INSIGHT PANEL, INFORMATION ABOUT APPOINTMENT COMPLIANCE, BROKEN BRACKETS AND LOST APPLIANCES IS EASILY VIEWABLE SO CLINICIANS CAN HAVE MEANINGFUL CONVERSATIONS WITH PATIENTS ABOUT POSSIBLE TREATMENT DELAYS.

information within the software they're already familiar with. Instead of, "One moment, I need to find your information [closes practice management software, opens aligner software, scroll, scroll, scroll]..." the conversation becomes, "Ah, yes, you're supposed to be on tray #9." The latter scenario is more professional and keeps patients from milling around the front desk or waiting on the phone. Consolidating aligner treatment tracking in a practice's management software leads to an improved user experience, more efficient treatment and better patient engagement.

*"With this improvement to practice workflow, office staff can easily identify issues and stress the importance of compliance and its impact on case time."*

#### KEEPING PATIENTS COMPLIANT WITH TREATMENT

Admittedly, clear aligners give patients more autonomy, so ensuring patients stay compliant with treatment is more important than ever, but compliance is a crucial issue for every patient. Patients with extended treatment time drain practice resources and—with the increased pressure on the cost of orthodontics—unhappy patients and parents want to know why

treatment is taking longer or costing more. Most of these extended cases come down to compliance, or lack thereof. Therefore, having the ability to view patient compliance is a workflow must when interacting with patients. When information taken by the front desk can be collected automatically—such as when an appointment is rescheduled—and compiled in the treatment card, that saves time and valuable practice resources. Once documented, clinical staff have the ability to easily check patient compliance without navigating away from the practice management software. The ability to quickly see a patient's compliance while chairside provides opportunities for team members to have meaningful conversations with patients and their guardians on how to streamline treatment time, such as working harder to keep appointments.

#### CREATING THE RIGHT RESOURCE FOR THE RIGHT JOB

Considering all the demands on today's modern orthodontic practice, Carestream Dental made improving workflow a priority when updating the treatment card in CS OrthoTrac v14. The analysis and design team took a unique "user-centered" approach to the CS OrthoTrac clinical space, directly engaging orthodontic practices for feedback. High-fidelity working prototypes of the treatment card were demonstrated and tested to validate the design intent of the proposed solutions. For example, after researching the common challenges

that practices face when tracking clear aligners, the analysis and design team created and tested a solution to see how efficiently staff members could get up to speed on a patient's aligner progress at a glance; essentially, eliminating valuable time combing through inconsistent clinical notes. As practice management consultant Mary Beth Kirkpatrick of impact360 says: "The unique aligner tracking system is fresh and new and will be important in tracking trays, revisions and treatment progress." To help practices address the issue of compliance, the new treatment card of CS OrthoTrac v14 includes an enhanced patient compliance section, which gives users an expanded real-time snapshot of the patient's broken appointments, rescheduled appointments, damaged wires, broken, etc. With this improvement to practice workflow, office staff can easily identify issues and stress the importance of compliance and its impact on case time.

Evolving patient demographics, increased competition and rapidly changing technology will continue to challenge orthodontic practices. However, improving workflow with practice management software could be a simple way for offices to stay ahead of the curve. CS OrthoTrac v14 was designed specifically to tackle these challenges to not only enhance practice workflow but improve the quality of care for doctors and patients. 🎮

*\*All patient data shown is fictitious and for illustrative purposes only.*