

A Best Practices Point of View from



Ensure Data and Financial Integrity and Security from the Inside Out

Safeguard patient information

Control your books

Streamline workflow

Mitigate fraud and theft

Protect your business

Manage roles and privileges

How secure is your practice data?

A Revenue Canada Auditor, a Royal College of Dental Surgeons of Ontario Officer and a Canadian Dental Association Privacy Officer walk into a dentist's office.

It might sound like I'm setting the stage for a joke. But this would be no joke – especially if it's *your* practice. And they wouldn't be there for a check-up, either. Any one of them could be visiting for an impromptu, random audit. Or they could be there to investigate an irregularity or a complaint.

They would ask quite a few specific questions, and would be interested in your general awareness and vigilance in several areas:

- ✓ How many people in your office have access to add, edit or delete financial information?
- ✓ Is there any chance that the integrity of your clinical data could be compromised?
- ✓ Are you protecting your practice and patient data?
- ✓ Particularly in a paperless environment, how well are you controlling authorizations and sign-offs?

How would you score?

It's more than back-up: It's the data itself

Well-designed software should have built-in tools to maintain security. So it will come as no surprise that ABELDent has an intrinsic mechanism that helps you to define user roles, control access permissions and maintain valid audit trails.

Our Authorization Manager is arguably the most comprehensive and valuable tool on the market. It is designed to control access to more than 120 features within the software.

While it may sound somewhat daunting to set up Authorization Manager for this many features, it's testimony to the importance of control and the abundance of ways that your data could be compromised, inadvertently or deliberately.

We're always reinforcing the importance of data back-up for safety and recovery purposes. When the power goes out or your system crashes, you need to get back on track without delay.

But when we talk about Authorization Manager, our focus is on the quality and integrity of the data itself:

- ✓ How and when data is entered, and by whom;
- ✓ How and when data can be changed, and by whom;
- ✓ How and when data can be deleted, and by whom;
- ✓ How and when your entries are authorized, and by whom.

The onus is on the practice owner to ensure that all financial and clinical records are accurate, reliable and traceable. Effective use of Authorization Manager empowers you to achieve this requirement and reap many additional benefits.

First Step: Unique User Identification

Regardless of which regulatory body – or bodies – govern your practice, the fundamental guidelines for electronic record keeping are similar. There must be safeguards in place that control and track who creates, alters and uses certain types of data.

Requiring each user to log in with a unique ID, and a password that is not shared with anyone else, is a critical first step. Once each user is uniquely identified, the system can provide permissions and track activity on a per user basis.

Assigning Member IDs and designating privileges can be easily accomplished in any size of practice.

Continuity of Patient Care

When notes are properly entered for patient appointments and contacts, you can tell exactly who has provided service to a patient and what the results were. If a subsequent user has a question about a record, or a follow-up to perform, it is clear who to consult. Communication within the practice – especially large, multi-user practices – is immediately enhanced.

This level of thorough documentation and follow-up ensures that the patient's required and recommended treatment doesn't fall through the cracks.

Accountability

When every user has a unique identity and secure credentials, there is a heightened degree of responsibility for proper and accurate record-keeping.

Everyone works hard to maintain that accuracy and communicate effectively. However, in a busy practice, details can get overlooked and mistakes do occur. Authorization Manager takes away the guesswork and empowers you to identify the source of any error for quick correction.

Transparency and Trust

The entire practice team benefits from well controlled data access. Pride and confidence in the integrity of your records improves workflow, as accurate, reliable records build through the actions and input of many team members throughout the day.

When privileges are set properly, with fewer points of access and user identification attached to every action, the practice enjoys a greater degree of transparency and trust.

Staff Training and Remedial Action

As mentioned above, when users are uniquely identified, you can pinpoint the source of errors and take quick remedial action. Sometimes it's the case of a minor oversight or lack of attention; in other cases, repeated errors or trends can be a result of gaps in knowledge or training. Early identification can save you time and money in the long run and help avert more serious complications before they happen.

New hire access to critical features can wisely be restricted and monitored until the required competencies, performance and trust levels are established.

Financial best practices

Electronic record keeping is not just about appointments or your clinical records. It's about the financial integrity of your business operations. Fundamental bookkeeping principles will always apply. Entries, postings, debits and credits, payments, adjustments... everything must be recorded and accounted for.

Adjustments

When mistakes do happen, any accountant will recommend the use of adjustments. Although it may be tempting to alter past transactions to improve the look of the data ledger, or to avoid potential confusion on an invoice... don't.

When it comes to data integrity, the journey is as important as the destination: How the balance got to the current state is as important as the balance itself.

Adding Treatments

In the event that a provided service is not recorded on the actual date performed, ABELDent allows the clinical date to be entered accurately while the financial record reflects current date, in keeping with Generally Accepted Accounting Principles.

Fool-proof and tamper-proof

Some ABELDent features require Authorization Manager to be activated or they won't work at all. This includes set-up features that, if changed, would have dramatic negative consequences and jeopardize the integrity of the system. In future updates, more features will come with this requirement.

ePrescriptions

One feature that has always had this restriction is prescribing medications. This just makes sense: Only a registered, authorized provider should have the unrestricted ability to print prescriptions.

A Dentist must be an active provider within Authorization Manager with permissions set to print prescriptions. Any user with appropriate permission can record medications or add prescriptions for the Dentist's approval; only the Dentist can print.

Electronic Charting

When a user in a paperless office first enters notes into a chart, changes can easily be made and errors corrected using edit and delete buttons. Electronic charting emulates paper charts in this way. When the patient activities have concluded and all input is finalized, the content is locked down using a chart certification procedure.

Long-term success

Software changes over time. So do clinical and financial regulatory requirements, patient expectations and staff. No one can predict the future, but a strategic dental software partner should anticipate change, plan for it, and help its clients maximize the opportunities and minimize the risks that come with it.

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Easy to use and fully integrated, ABELDent offers efficient product implementation with customized training, patient/practitioner portals, unparalleled customer service and around-the-clock support to thousands of Dentists across North America.

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