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Cloud-based practice management systems:
The view is worth the climb

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AFTER GRADUATING from dental school in 2017, I purchased a wonderful but outdated private practice in Colorado. I immediately renovated the entire office and replaced most of the old dental equipment. I was happy with the changes, but one important aspect of the practice still looked and functioned like it was 30 years old—the practice management software. I was hesitant to depart from the popular server-based software, but eventually I took the plunge and transitioned to a more modern, cloud-based option.

I think many providers are starting to find themselves in the same position I did—wondering if they should make the move to cloud-based software. We've become accustomed to the benefits of the cloud in almost every other software or app that we use, such as email, data storage, and social media. In dentistry, we now have many cloud-based options to choose from. Furthermore, the pandemic shutdown forced a shift toward remote dentistry and highlighted the importance of remote access, reliable data security, and contactless protocols.

In this article, I'll share my experience of evaluating and transitioning to a cloud-based solution to help other practice owners who are considering this change.

THE TIPPING POINT FOR CHANGE
The practice that I purchased was using server-based software that was ubiquitous, fully featured, and well-established. I had experience with it, but as the practice owner I was viewing it with fresh eyes.

The software had been revolutionary for its time; however, it and other server-based software options are built on an outdated framework. This is evident in the dated graphical icons, user interfaces, and reliance on servers and local networks. Over the years, management software has tacked on more and more new features, rather than completely reprogramming and integrating them. The result is sprawling and inefficient, like an old home that has been added onto multiple times rather than being renovated from the ground up.

To illustrate my point, modules such as the patient chart, perio chart, documents, and family record all load on individual windows like completely separate applications. When closing the perio chart, a pop-up would remind us to minimize the window rather than close it, because it would take so long to open again for the next patient.

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Another example was the fact that the function of producing and viewing radiographs was not built into the software, but rather required a third-party add-on. In my opinion, radiographs and photos have become an integral part of a patient's record and as such should be an integral part of dental practice software.

Regardless of my initial impressions, I had a practice to run, so I decided to temper my expectations and just figure it out. I quickly discovered that our software was over five years behind the current version, despite paying monthly for updates. Though irritating, the discovery gave me hope that bringing the software up-to-date would result in major improvements and increased speed for routine tasks. Tech support explained that an update hadn't been completed due to failed hardware requirements, so over the next several weeks, I spent thousands of dollars replacing every computer in the office. We finally installed the update. Unfortunately, it failed to deliver on any substantial improvements, not even a noticeable speed increase, despite the new computers. I was disgruntled, but as a new practice owner, I had about a million other issues to deal with (three employees), so I shook it off and moved on.

About a year later, I became interested in some great features offered by third-party companies. Namely, practice analytics with flexible filter criteria, real-time output, graphs, charts, and patient engagement features like those offered by Lighthouse and Weave. My software offered integrations for these companies, but I didn't really want more add-ons or more subscription fees.

That was when I finally realized that a server-based system did not have—likely would *never* have—everything I was looking for. Then the question became, "What else is out there?"

THE CASE FOR THE CLOUD

I began to research different dental software options. I was looking for something built from the ground up that would be fast, efficient, and modern. I wasn't specifically looking for cloud software, but my research immediately revealed that basically all new dental management software options are cloud-based solutions. Cloud technology lends itself perfectly to dental management software in many ways.

For example, HIPAA mandates that patient information is kept absolutely secure from data breaches, but also redundant to prevent data loss or destruction. Most of us have patient data stored in about 15 different places, including a storage locker stacked with old paper charts. This is great for redundancy, but poor for security. Cloud software stores data in a dedicated facility where extreme measures have been taken to provide protection from natural disasters, security breaches, and anything else you can think of.

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In a CE webinar titled *Why now is the time to explore cloud-based practice management software*,[1] Dr. John Flucke covered the benefits of cloud technology. Some of the key advantages include:

- No dedicated servers or local networks required
- Reduced IT costs for maintenance and troubleshooting
- Automatic and redundant data backup
- Automatic software updates
- High-level data security
- Remote access to data
- Reduced cost of ownership

EVALUATING CLOUD-BASED OPTIONS

After deciding to switch to a cloud-based solution, I began to evaluate the options. The first thing I noticed is that some solutions are not truly cloud-based; they only have cloud features. A true cloud-based solution should pass the following criteria:

Does the solution require a server in your office? If a local server or workstation is required to host the practice management software or store patient data, it's not really cloud based. Hybrid options exist where data is instantly synced to remote servers, but the software and the primary data are still stored locally.

Can you log on from a web browser? Users should have total access to the software from anywhere by opening a web browser and logging in. A downloaded program or a remote access service such as TeamViewer or LogMeIn shouldn't be required.

Does the solution require local IT support? A cloud system doesn't require local IT support because maintenance, security, backups, and updates all happen on the back end. If there is an issue, your computer can be ruled out if it can power on, connect to the internet, and open a browser.

Many full-featured cloud-based solutions have emerged, including Curve Hero, Denticon, Dentrix Ascend, Dovetail, tab32, and more. I explored several demos before selecting Curve Hero. Curve Hero was built from the ground up with a modern interface and usability that impressed me. It also included many of the features I was seeking, such as integrated radiographs and in-depth practice analytics.

Whichever cloud-based software option you look at, be sure to consider the following:

Data conversion. Can the provider successfully convert all of the patient data from your current software without omissions or errors?

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Complete practice management. Can the software provide all major functions to run your practice, especially if you have multiple locations? At the time I was evaluating, some of the options appeared to be a "lite" version of existing server-based software and were missing important features needed for a standalone solution.

Data security. What cloud servers are being used by the software provider? Do they provide redundancy, security, and activity auditing by user login?

User interface. Is the user interface clean, fast, and easy to use? Take the time to do a demonstration. Consider that most employees will not have experience with cloud-based software yet. Is it intuitive and easy to learn?

Continued investment or support. Long-term support and improvement of a practice management solution is important. Consider asking what improvements are in the pipeline. What updates or improvements have been made recently? What is the history of the company or parent company?

Customer support. Will training for future hires be available? Is it easy to reach actual human beings for routine support? Can you submit tickets and get a quick response?

THE CONVERSION PROCESS

Adopting new dental management software is daunting, and I expected it to cause major inconvenience and interruption to my practice. The process probably varies for different cloud-based solutions, but for me it was surprisingly simple and happened without much interruption.

First, a Curve data expert accessed my server remotely and extracted our records which were then converted and loaded into a training database. For the next six weeks, our team was trained on the software while simultaneously reviewing the records for accuracy. Two days before going live, our data was extracted and converted again. This second data set, which became our live database, captured newly created records and updates based on our input—all without any extra work or dual data entry for the staff. The final step was to create individual logins, set user permissions, and start using the new software full time. In addition to converting our practice management records, Curve provided a hard drive to transfer our images and documents. A remote technician copied our files to the hard drive, which I mailed back, and in a short time our thousands of images and documents were uploaded to the cloud database.

THE VIEW IS WORTH THE CLIMB

Leaving a well-established dental management software for something relatively new was a leap of faith, but in hindsight, I'm very happy with the decision. Besides improved speed and efficiency for everyday tasks, there have been many benefits of using cloud-based software for the last few years.

After making the switch, I dug into my practice data again, but with improved practice analytics and recall tracking. I discovered about 400 patients who were overdue for recall exams and cleanings and hadn't been contacted; they'd been lost in the shuffle during the practice transition. The information was there, but we had missed it in the old software. Calling those patients was a huge boost to the practice, and a testament to the power of modern practice analytics and reports.

During major snowstorms, COVID-19 lockdowns, and other times when we couldn't be in the office, we've benefited from being able to manage emergencies and patient rescheduling remotely. Previously, we used TeamViewer for remote access, but that wouldn't work if a storm knocked out the power to the server. Now, even if the power or internet is out, we can access the software from a different network or even via mobile. The activity of each employee is logged and controlled by permissions set per user login, which gives me peace of mind when employees are working remotely.

Finally, cloud-based software providers can update their products without interruption to the practice and with minimal hardware requirements. I cannot speak for other cloud softwares, but Curve Dental has been surprisingly responsive to feedback and has made a lot of improvements over the last few years. For example, they recently introduced Curve GRO, an integrated patient engagement module with two-way texting and automated appointment reminders.

We've seen cloud-based technology transform and improve our daily lives in many ways. Soon, I think the same will be said for the way we manage our dental practices. **DE**

REFERENCE

1. Flucke J, Streeter J. Why now is the time to explore cloud-based practice management software. CE course. Viva Learning. November 19, 2020. https://vivalearning.com/member/classroom.asp?x_classId=4189

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