

## **From Paper to Screen--Making the Move to Electronic Treatment Charting**

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After finishing today's adjustment for Aaron, your orthodontic assistant sits at her workstation to catch up on some "paperwork" while Aaron puts on his elastics. With a few keystrokes, she notes the procedures done today, the doctor's requests for his next visit, details an extraction request to a referring dentist, and prints a letter to the parents reminding them to get Aaron's teeth cleaned. Normally, she also makes Aaron's next appointment at the chair, but since his mom is on her way back to the office from work, the scheduling coordinator will make his appointment when mom arrives.

The technology found in this practice has reduced the maddening inefficiency and administrative bottleneck that plague most orthodontic offices ---the paper chart.

Computers are now considered standard equipment in orthodontic offices. But most are limited to basic administrative tasks such as scheduling and finances. More and more, orthodontists are adding technology that links information directly to patient care, leaving behind mounds of paperwork. This article shares some benefits and challenges of moving to the world of electronic charting.

### **What are the Benefits of Electronic Treatment Charting?**

#### **No More Lost Charts**

Lost and misplaced charts are mostly a thing of the past. No more announcing lost charts in the morning meeting! An electronic audit trail tracks all changes and notes team member or doctor made them. Deletions aren't possible.

#### **Repetitive Manual Tasks Eliminated = \$ Saved**

Medical Economics (December 1997) estimated that the creation, tracking, storage and maintenance of paper records cost \$8 per record per year. With electronic records, there is no space wasted on chart stacks and no need for pulling and filing charts daily. Staff can use their time more productively. The maintenance of an electronic record is estimated at \$1-2 per chart per year, netting a savings of \$6/chart annually. Of course, during the conversion dual medical records will probably be maintained, so this savings will be recognized over time.

### **No Pulling Charts for Phone Calls**

When patients call about problems with their braces or come in for a special visit and there is no notation on the chart, the scheduling team often replies with, "I didn't have time to pull the chart." Electronic charts allow staff to quickly access patient files for detailing calls.

### **Immediate Chart Access Anytime**

"Susan, can you pull Denise's x-rays?" Murphy's Law says that you won't be able to find the chart, since doctor needs it right away. With the use of imaging, doctors and staff can pull up patient records at the touch of a button.

### **You Can Actually Read It!**

How many times have you tried to decipher a doctor's handwriting? OK, some staff have writing that is difficult to read as well. Electronic charting and the use of a definitive abbreviation list make documentation easy to read and understand.

### **Consistency in Formatting**

It is not uncommon for treatment information to be written in different areas, depending on the preference of the staff member. Electronic charting utilizes organized columns to prompt proper notations in each column.

## **What are Some Considerations of Electronic Treatment Charting?**

### **Power Outages**

Technology is not foolproof. A computer crash or a power outage could prevent access to patient records. To cover those possibilities, some offices use battery-powered back-up units that bring the system down safely within 15 minutes. All records are always backed up daily. Some use tape, which is removed each day and stored off site; others are now backing up over the Internet.

### **Training Team Members**

Typing skills are a distinct advantage for efficiency. General typing and or computer training may be required for some staff prior to implementation.

### **Communicating with Front Desk**

In a busy practice, or a practice with a new scheduling coordinator, the paper chart is very helpful in identifying patients. Busy offices that are not able to schedule from the chair sometimes still require paper slips to identify the patient so the next appointment can be made.

### **Physical Preparation**

Making space for hardware and the associated cabling must be planned and well organized. It is best to have one computer per chair to prevent potential confusion with sharing terminals.

### **Conversion**

It is important to determine the information you wish to convert to the electronic chart. It is impractical to retype all treatment information for every patient, so identifying the vital information required for each patient is an important first step in preparing for the conversion.

### **Is Electronic Charting Right for You?**

Just like anything else, learning and preparing for a new system takes time, determination and team involvement. The goal is that the benefits will outweigh the disadvantages and temporary inconveniences. Is it time to consider electronic charting for your office?