

# Does Your Current Practice Management System Still Support Your Practice?

## A Dental Software Reality Check Checklist

Every practice should know whether their current system is helping them run efficiently — or quietly creating extra work. Use this checklist to evaluate your existing practice management software honestly. If you can't confidently check most of these boxes, it may be time to reconsider whether your current platform is the right long-term fit.

### System Architecture & Reliability

- The system runs consistently without slowing down during busy hours
- Performance does not depend on in-office hardware or aging computers
- Multiple users can work at the same time without crashes or lag
- The software performs the same across all workstations
- Downtime is rare, short, and clearly explained
- The vendor manages updates, maintenance, and infrastructure without disrupting the office

### Security, Backups & Compliance

- Patient data is securely stored and encrypted
- Backups happen automatically without staff involvement
- User access can be controlled by role or permission level
- Audit trails track changes to patient and financial data
- The vendor can clearly explain how security and compliance are handled
- Updates and patches are applied regularly without requiring manual effort

### Workflow Integration & Single Source of Truth

- Scheduling, clinical, billing, and reporting all live in one system
- Information stays consistent across schedule, chart, ledger, and reports
- Changes update in real time
- Staff do not rely on notes, spreadsheets, or memory to track important details
- The system reduces duplicate entry instead of creating more of it

### Insurance & Financial Accuracy

- Insurance plans stay organized without duplicates
- Fee schedules apply correctly every time
- Estimates are predictable and reliable
- Ledgers are clean and easy to reconcile
- Reports match what the team sees day to day
- Financial data can be trusted without manual correction

### Treatment Planning & Patient Presentation

- Treatment plans load quickly during patient conversations
- Images, X-rays, and documents display without delays
- Templates and presets behave the same for all users
- Presentations look professional and easy for patients to understand
- The software supports conversations instead of slowing them down

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### Multitasking & Team Collaboration

- Multiple team members can access the same patient record at once
- Opening charts, images, and reports does not freeze the system
- Staff do not have to wait for each other to finish tasks
- The system supports real-time collaboration
- Busy days do not cause performance problems

### Reporting & Visibility

- Reports run quickly and consistently
- Data matches what the team sees in daily workflows
- Custom reports stay accurate after updates
- Leadership can see performance clearly without extra tools
- You do not need spreadsheets to verify the software

### Automation & Efficiency

- Routine tasks are automated instead of handled manually
- Appointment reminders, forms, and billing follow-ups run without staff effort
- The system reduces repetitive work instead of creating more of it
- Updates improve workflows instead of breaking them
- New features feel integrated, not bolted on

### Vendor Support & Accountability

- Support responds in a reasonable time
- Issues stay tracked until they are resolved
- Updates are communicated clearly before deployment
- Problems are explained, not ignored
- You can speak with current customers using the system

### Scalability & Long-Term Fit

- The system can support multiple providers or locations
- Adding users does not require major IT setup
- The software keeps improving over time
- The vendor has a clear product roadmap
- The system is built for how dentistry operates today

### Final Reality Check

- The software reduces complexity instead of adding to it
- Your team spends less time working around the system
- Financial and clinical data are clear and reliable
- You trust the system during busy days
- The platform supports growth instead of limiting it