

Should You Switch Your Practice Management Software?

Six checks you can run this week, each using numbers your team already has. Work through them before you compare a single vendor.

How to use this

- 1 Answer each check in the space provided. None of them need data you would have to go hunting for.
- 2 Tick the flag box when your answer crosses the line described under it.
- 3 Count your flags at the end. Three or more means the problems are structural rather than occasional.

01 Logins per visit

FLAG ☐

Count how many programs your team opens to check in, treat, and check out one patient.

PROGRAMS OPENED _____

Flag it if the answer is three or more.

02 Add-on costs

FLAG ☐

Add up what you pay each month for tools outside your core system: texting, online booking, forms, payments.

MONTHLY TOTAL _____

Flag it if several of these duplicate what one platform would include.

03 Server backups

FLAG ☐

Find out who handles your server backups and when someone last tested a restore.

LAST TESTED _____

Flag it if no one has tested a restore. An untested backup may fail on the day you need it.

04 Insurance time

FLAG ☐

Estimate how many front-desk hours each week go to eligibility checks and claim follow-up.

HOURS PER WEEK _____

Flag it if the number is rising. That usually means billing tools that do not talk to each other.

05 Online booking and payments

FLAG ☐

Check whether patients can book and pay online through your current system.

BOTH, ONE, OR NEITHER _____

Flag it if patients cannot do both without an add-on.

06 AI readiness

FLAG ☐

Ask your current vendor which AI tools work inside the system today.

TOOLS INCLUDED TODAY _____

Flag it if every new capability requires another subscription.

What your flags mean

YOUR TOTAL _____

- | | |
|-----------|---|
| 0 to 1 | Your system is holding up. The gaps are occasional rather than structural. Worth re-running this in a year. |
| 2 | Worth watching. Fix the specific gap before replacing everything. A single add-on or a process change may be enough. |
| 3 or more | The problems are structural. These are costing time every week and will not resolve on their own. Start comparing platforms. |

If you decide to switch

START A FEW MONTHS OUT

- ☐ **Name a project lead.** One team member owns the timeline and gathers what the vendor needs. A single point of contact keeps decisions moving.
- ☐ **Choose your go-live date carefully.** Schedule the launch outside your busiest weeks, so your team has room to adjust while patients keep coming in.
- ☐ **Ask the right questions.** Find out which records each vendor converts and what support it offers after launch.
- ☐ **Start insurance enrollment early.** Automatic payment posting needs a separate enrollment with each carrier, and approval times vary.

One platform instead of a core system plus add-ons

Oryx is cloud-based dental practice management software built by dentists, for dentistry. Clinical charting, FDA-cleared imaging, patient communication, online scheduling, and billing run in one subscription, so there is no server in the back office and no add-on to license for each new capability. Oryx migrates data from more than 50 platforms and runs test conversions before launch.

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