PG Tech SOLUTIONS

Systems Snapshot — Findings Summary

FREE · 90 MINUTES · ONE SYSTEM

PREPARED FOR	SYSTEM EXAMINED	DATE	PREPARED BY
Harbor Lane Dental (fictional)	Dentrix: scheduling and recall workflow	September 3, 2026	Paul Goldman · PG Tech Solutions LLC

A complimentary 90-minute review of one system: where time and money are being lost, a fixed price for each recommended fix, and what requires no action. **Every price below is fixed in writing, and this document may be shared with any party.**

WHAT WARRANTS ATTENTION

1. A third of your patients never get appointment reminders

Quick Fix · from $500 flat

What I found: Text reminders only go out when the mobile number sits in Dentrix's cell-phone field. Years of records have it filed under "home", so roughly 3 in 10 active patients get no reminder at all.

What it costs you: The front desk spends about two hours a day on manual confirmation calls, and last month's 11 no-shows cluster almost entirely in the never-reminded group. A no-show chair hour bills nothing.

The fix: Correct the reminder rules, bulk-move the misfiled numbers, and turn on the delivery report so you can see it working every week.

2. The day sheet is retyped into QuickBooks every night

Quick Fix · from $500 flat

What I found: The closing routine prints the Dentrix day sheet, then production and collections are re-keyed into QuickBooks by hand, about 25 minutes a night. March is still $180 off between the two.

What it costs you: Roughly nine hours a month of skilled front-office time, plus a books-vs-Dentrix mismatch that means nobody fully trusts either number.

The fix: Turn on the export your Dentrix plan already includes and map it to the right QuickBooks accounts once. After that the night close is a two-minute check, not a retype.

3. New-patient forms are typed in twice

Scoped investigation · $500 flat

What I found: Your website form emails a PDF; the front desk re-keys every field into Dentrix. There may be a clean import path, but it depends on how the website form is built. I'd be guessing off a 90-minute look.

What it costs you: About 15 minutes per new patient, and typos in exactly the fields (phone, insurance ID) that cause problems later.

The fix: This one warrants a proper investigation before anyone touches it: a fixed-price look at the intake path that ends in a fixed price for the fix itself.

FINE AS-IS

- ✓ Backups are running and restorable. I verified a restore of Monday's set. Leave the schedule exactly as it is.
- ✓ The imaging bridge between Dentrix and your X-ray software works correctly. Don't let anyone "upgrade" it.
- ✓ Skip the $299/month analytics add-on you're being quoted. The three reports you actually use are already in the plan you own.

NEXT STEP

Finding 1 is where the money is. Say the word and I'll schedule it this week. Or take this page to anyone you trust; the prices don't change either way.

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SAMPLE