

# Integrating New Patients into a Dental Practice

Using PDFfiller to Make  
the Patient Integration  
Process Fast and Easy

## Who?

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David Wolf, DDS runs a small but successful private dentistry practice in Milford, West Boston. This tight-knit medical care provider develops an intimate relationship with its clients and focuses on providing the best care possible. “We specialize in adolescents to adults,” David Wolf said. And with seven employees and one dentist to cover “about 1500 active patients,” David Wolf needs to make his workflow as efficient as possible to ensure that he can integrate new patients into his care as rapidly as possible.



David Wolf, DDS

## The Problem

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Integrating new patients into thriving practice isn't always easy. With 1500 patients already in his care, adding new patients was taking unnecessary time and energy away from those already in his care.

The old process of integrating new patients into his care was clumsy and time-consuming before Wolf switched to PDFfiller. “We have all digital charts so what was happening before, the patient could fill in the PDFs, but they'd have to print them out and bring them in. But then we'd have to scan them back into their digital chart and then we would shred them, so we were kind of chasing our tail,” Wolf said.

And that was when the office was fortunate enough to have patients follow through on their paperwork at home. Often, with Wolf's previous solution, patients “either didn't [complete the forms], which meant that when they showed up, we had to give them written forms to fill in in the waiting area, or if they did do it, they would bring it in, or sometimes they forgot them.”



Wolf knew that he needed to cut down on the time it took to integrate patients. Drawn by PDFfiller’s ability to easily make forms fillable and have them filled out digitally by clients, Wolf “figured out that I could probably set [PDFfiller] up [for business]. “We’re seeing about 20 new patients a month and the amount of time it would take to get the information on paper and scan it in and shred it was probably 15 minutes per patient, so probably about four hours of work per month” said Wolf.

Then Wolf tried PDFfiller and simplified his digital document management. Now, “we... use [PDFfiller] to process new patients,” said Wolf. And, “[The transition] was really simple for the office.”

## The Solution: PDFfiller

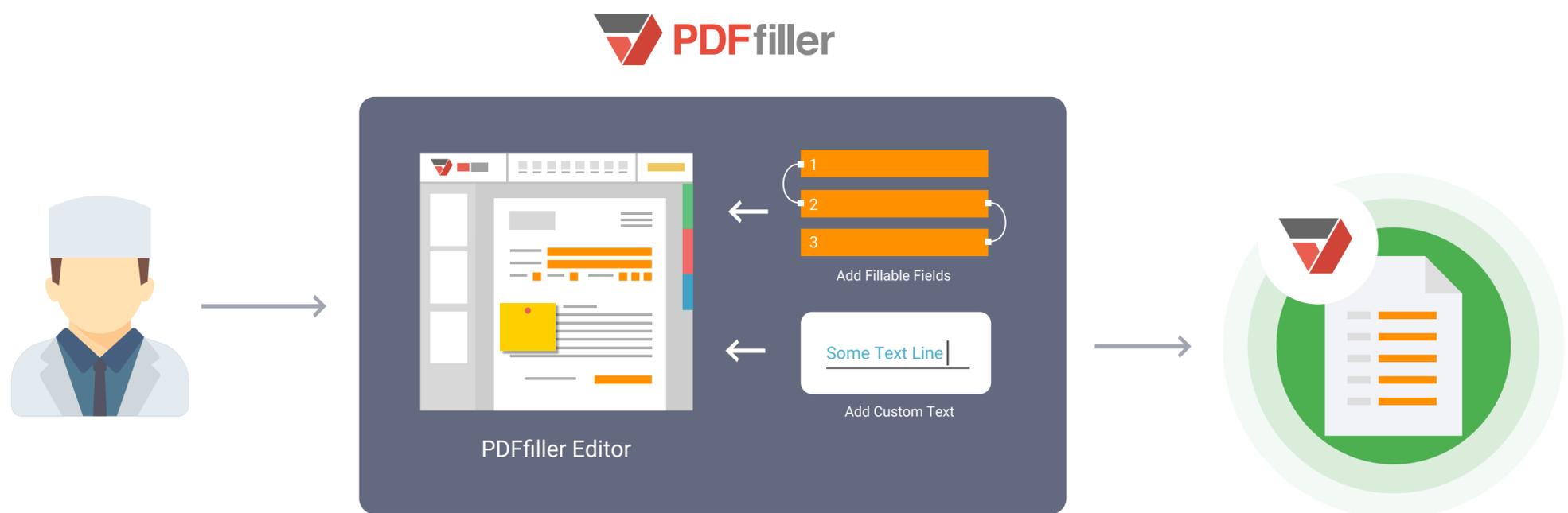
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Now, said Wolf, “we’re using [PDFfiller] for our patients to submit their medical history forms and insurance forms online.”

David Wolf’s front office depends on PDFfiller, saving them time and energy and making the process of integrating new patients into their care easier than ever.

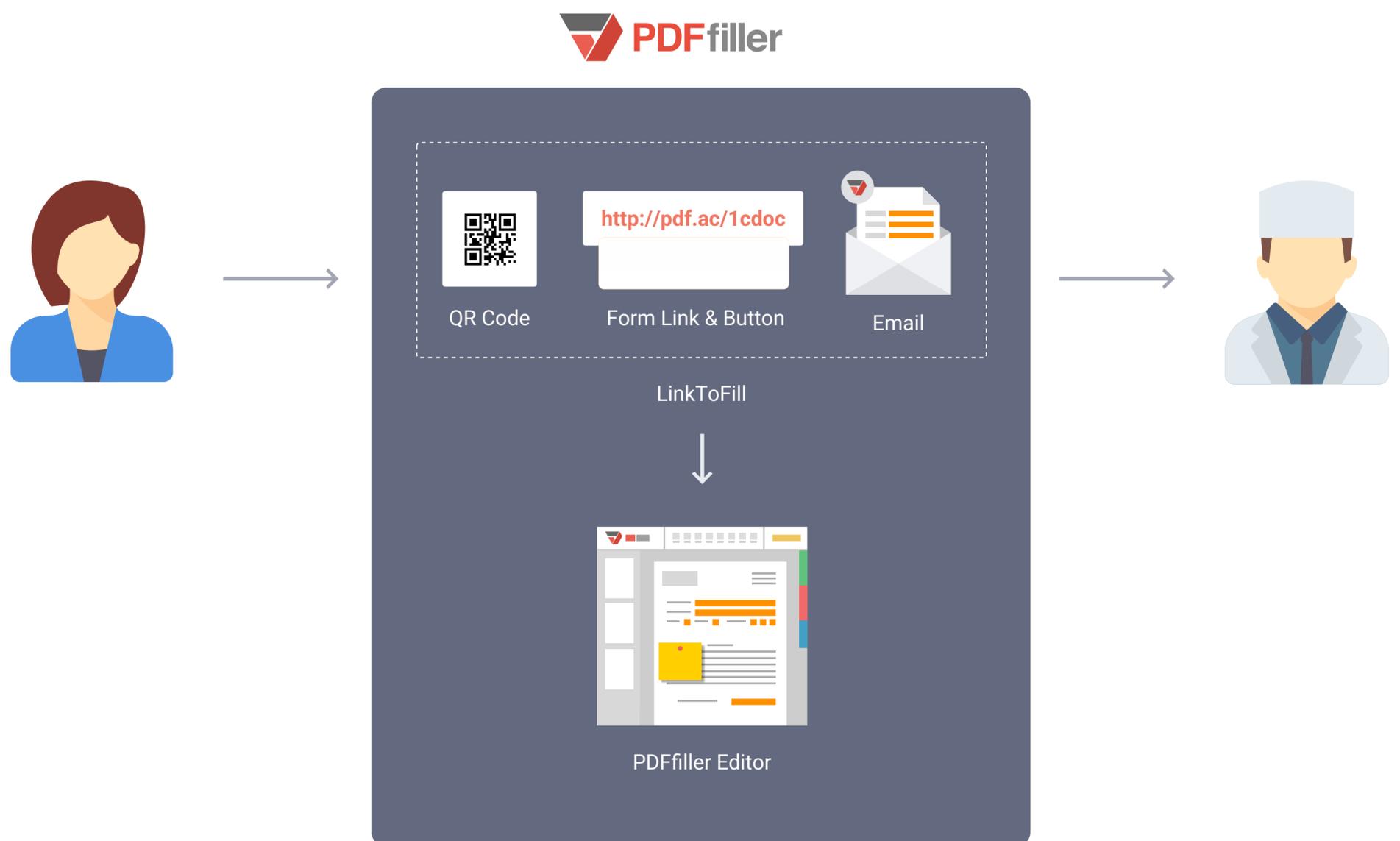
The process of integrating PDFfiller into Wolf's office workflow was easy:

“We already had the fillable forms ready to go,” said Wolf. “There was a little bit of effort getting the fillable link forms the way I wanted them,” but after uploading a document or downloading one from the internet, converting it into a fillable form is easy with PDFfiller's drag-and-drop form creation wizard, which allows users to add fillable fields intuitively to a form with just a few clicks. Importantly for Wolf, PDFfiller allows parts of the form to be made mandatory including adding contact information – “since [with] the fillable forms, you can select what fields are required, it also saves us from having the patients not skip something... we [also] force patients to put their name and email address in when they submit the form so it allows us to match their name up with their digital chart in the office and import the information into their chart,” said Wolf, making the whole process much easier for Wolf's front office.

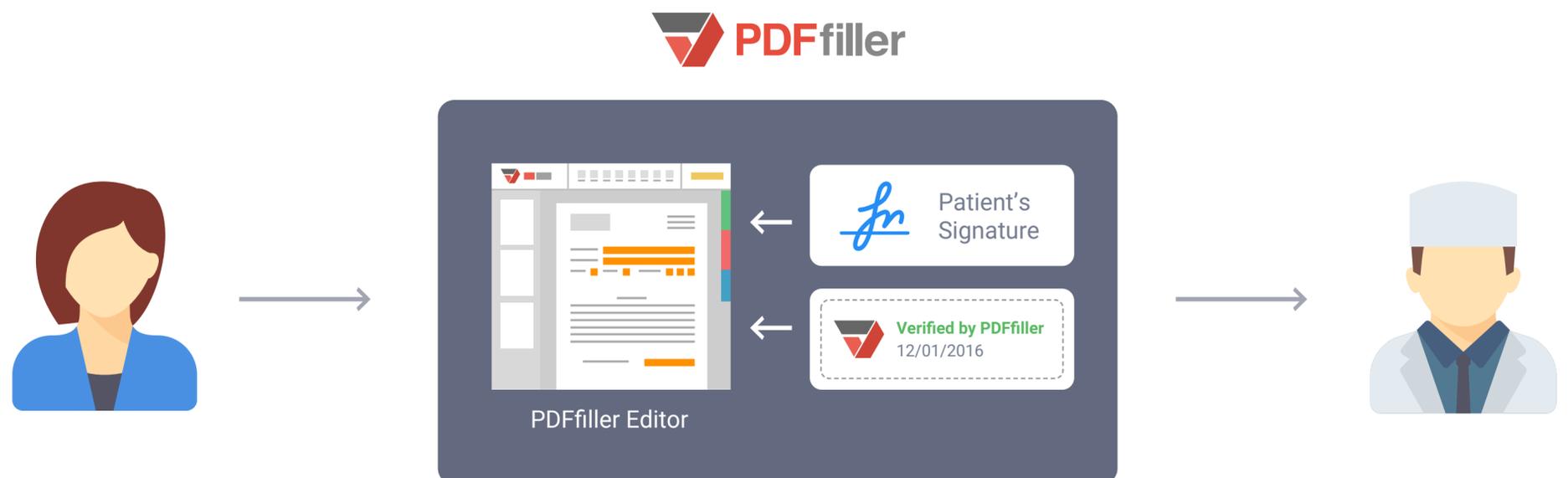


After Wolf created his fillable form, he could then distribute it to patients in a number of ways. However, Wolf chose to integrate the fillable PDFfiller form into his website. “If we have a patient call for a new appointment, the easiest thing we do is we just have them go to our website and click on the link [to the fillable document],” said Wolf. “But if they're not somewhere where they can do that right when they're calling us, then we will get their email address and email them the link, so they can collect the email and click on the link to fill the forms out later.”

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The powerful ‘LinkToFill’ feature allows PDFfiller users to send fillable forms to recipients to complete and return with just a click from inside PDFfiller’s easy-to-use online interface. You can also distribute forms with a URL or a QR code. PDFfiller’s powerful and proprietary ‘SendToSign’ feature makes it easy to create a form and send it to others for a legally-binding electronic signature with just a click.



After a new patient completes a form, Wolf's front office receives an email notifying them that a form has been completed by a specific new patient. The front office will "save the PDF information and then import it into the patient chart." "[When] the patient arrives for their appointment, we have all their information," said Wolf, making the check-in process quick and easy for Wolf's front office and the patient.

## Benefits



### Speed

PDFfiller is the fastest way to add patient data into Wolf's database and new patients into his practice. "Probably [dealing with new patients' forms takes] less than a half an hour's worth of work [with PDFfiller]," said Wolf, "So it's probably saving us close to three and a half hours of office work a month." Wolf's office has cut the time of processing intake forms by 87.5% using PDFfiller. "Being able to have [patients] be able to fill the forms out online and have them directly imported into their digital charts saves us a ton of time," said Wolf. "It also saves us so much time because we do not have to scan the information back in and shred it as we did with the paper version." Moreover, PDFfiller never saves customer data on its servers after the customer deletes his form – PDFfiller does the digital shredding for you.



## Convenience

Not only is PDFfiller the fastest way to fill out forms online, it is also the most convenient, making the new patient intake process easier for both patients and front office staff. “[PDFfiller] just makes it a lot more convenient for [new patients] if they want to have the forms ready before they get here,” said Wolf. Moreover, PDFfiller “streamlines the communication process and it decreases the amount of manual labor that we have to do to collect the patient data... it saves our office a huge amount of effort in collecting the patient data” and makes dealing with medical information and insurance companies much easier,” Wolf said.



## Cost Savings

It’s difficult to quantify the value of PDFfiller, said Wolf. PDFfiller, though, saves the office time and energy and “for the cost of running a dental office, [the] \$180/year subscription for PDFfiller is a really inconsequential amount of money. I think it’s really reasonably priced and I think it certainly pays for itself in convenience alone.”



## Security

PDFfiller makes it safer to transfer and store documents than other online services, or even keeping paper copies. Completely HIPAA compliant, PDFfiller makes digital document management secure. [Before PDFfiller] we had the fillable forms, but we weren’t having the patients email them to us because of the security thing. But having a secure portal where the patient can just fill in their form and submit it is the reason we decided to start doing it this way [with PDFfiller],” Wolf said.





## Customer Service

PDFfiller's customer service is available 24/7 to help users whenever they have a problem and make the most of the internet's best complete document management solution. Customer service was great, they helped me, they helped merge some documents together. I had a great response from customer service, for sure," said Wolf.

## Conclusion

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At Wolf's dentistry practice, PDFfiller has proven itself to be the best way to integrate new patients into the practice. Faster, easier, and safer than other solutions, PDFfiller makes the process better for both staff and the patients themselves. "So far we haven't had any problems," Wolf said. "The staff likes it because it saves them a lot of steps."

PDFfiller has improved the rate at which new patients complete forms before coming into the office, making it easier and faster to integrate them into Wolf's digital patient system. "We probably have about fifty percent response rate now, where the patients submit the form digitally," said Wolf. And while "half [of the new patients] show up and do it on paper once they get [to the office], said Wolf, "our next step probably will be to actually use a tablet in our waiting area, so instead of filling out the form on paper in the waiting area, we'll just have them fill it out on the tablet while they're here, so we can just eliminate that extra paper step as well." Wolf also hopes to integrate PDFfiller's API functionality into the website of his other company, Dental Care Links, to process PDFforms and "incorporate PDFfiller's ability into [Dental Care Links'] functionality – two solutions in one location," Wolf said.

As a digital document management solution, "I would definitely recommend it to any dentist or doctor that needs to have their patient fill in the medical history forms before they arrive," Wolf said. "I think it's a great solution."