

Planet DDS Scales Practice Management Services with Quick Base

Planet DDS offers outsourced insurance billing services, known generically as Revenue Cycle Management (RCM), which streamline a dental practice's billing procedures and speed the collection of insurance receivables. The company's groundbreaking products and services give dentists low-cost access to advanced solutions for improving the administration, quality and profitability of their dental practices. To automate its RCM services, Planet DDS built an app on Quick Base that enables the company to manage a remote workforce, facilitate the gathering of specific insurance information, create customer reports and customer invoices, and integrate seamlessly with their practice management application.



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Bill Jackson, DDS - VP, Business Development,
 Planet DDS

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The Challenge

- Spreadsheet-based system for storing patient eligibility data didn't scale with increased demand
- Insurance eligibility claims required timely and consistent follow-up
- Payments and invoices needed to be created based on work performed

The Solution

- Quick Base app for tracking insurance eligibility data from request to client delivery
- Report generation details service request information and progress
- Online data storage gives remote agents access to updated eligibility data in real time
- Alerts, notifications and reminders trigger action needed on claim follow up

The Results

- Reduced agent time spent on insurance eligibility data gathering
- Improved information quality due to real-time transaction auditing
- Agent management simplified with online tracking and control
- Finances and profitability insight improved with more flexible billing



Based in Irvine, California, Planet DDS is an industry-leading provider of cloud-based apps for managing every aspect of a dental practice – including the important task of collecting and validating patient insurance eligibility information that’s critical for practice revenue. At first, this data gathering effort was a highly manual task that required Planet DDS’ fleet of remote service agents to call insurance companies to collect patient reimbursement data for their dental clients.

But timing is everything, as agents must have the insurance information to the dental offices within 48 hours of a scheduled patient appointment. On any given day, close to 100 Planet DDS agents updated as many as 10,000 patient records for their dental clients. Yet as quickly as the agents worked, the spreadsheets they were using to capture and share eligibility and insurance data couldn’t keep pace with increased demand.

“We had collected hundreds of thousands of insurance records, and we needed to make that data accessible to our agents and push it out to the practice management application, where it could be accessed by our dental clients,” says Bill Jackson, vice president of business development.

What’s more, Planet DDS needed to bill clients and pay agents based on the number of service request transactions that were completed.

“With our data in spreadsheets, we couldn’t effectively track how many transactions were completed in a day, and we certainly couldn’t perform quality reviews on that information,” explains Jackson.

Making routine data collection easy

Planet DDS built an insurance benefits app on Intuit Quick Base to give agents fast, easy access to the employer-level dental benefits information in one central location. Agents could now access stored eligibility and reimbursement information without having to call insurance companies for every new record that came into the practice management system.

With insurance benefits data managed centrally online, Planet DDS can track when a request is received, when it is completed and trigger alerts when a request is falling behind schedule. Invoices can be generated based on the transactions performed for each dental client – and Planet DDS can run reports to evaluate payments versus revenue.

“I want to know at a moment’s notice what our billing was for the past month and get details on how we arrived at that billing,” says Jackson.

Process efficiency keeps customers smiling

Since implementing Quick Base, Planet DDS has reduced the number of calls that agents have to make to insurance companies, saving time and speeding the process of responding to dental client requests for patient eligibility confirmation.

As its remote agent base increases, Planet DDS can manage its workforce more accurately now that it can track the number of transactions performed and audit those transactions for quality in real time.

“We weren’t able to manage our agents effectively before Quick Base. Now we have true accountability into how many agent transactions are completed and how accurate that information is,” says Jackson.

Billing is more precise now that Planet DDS can create invoices based on actual work performed that's tracked within the Quick Base app, giving more financial insight into how revenue is trending.

And customer satisfaction has been improved now that Planet DDS has a more customized approach to responding to dental office requests with the right information at the right time, says Jackson.

"We're absolutely committed to getting accurate information to our dental offices two days prior to the patient appointment, and Quick Base is the product we use to do that."



About Quick Base

Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes more than half of the Fortune 100.

For more information, please visit: www.QuickBase.com