



# RCM Automation Guide

Solutions for DSOs and Dental Groups

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# RCM Automation Guide

Modern revenue cycle management (RCM) software plays an increasingly important role in helping DSOs and dental groups scale operations effectively. Rising costs, frequent claims denials, and ongoing staffing shortages continue to strain resources—making manual, disconnected billing systems no longer sustainable.

According to a recent Guidehouse RCM report, **72% of healthcare and dental executives identified RCM technology—including automation, AI, and machine learning—as their highest investment priority for the next twelve months, aiming to address staffing shortages and improve efficiency.**

The 2025 U.S. Revenue Cycle Management Market report also valued RCM worth at \$141.61 billion USD last year and is expected to reach **\$272.78 billion USD by 2030, highlighting the growing demand for scalable RCM solutions.**

For DSOs and dental groups focused on growth, RCM automation supports faster collections, reduces errors, and improves visibility across locations, making it a core component of today's operational strategy. This guide explores how automation improves key areas of the revenue cycle and why the right RCM solution can transform performance across your dental organization.

## Industry Snapshot: The Push for RCM Investment

# 72%

of healthcare executives say **RCM technology** is their **top investment priority**, driven by staffing and efficiency concerns.

Source: Guidehouse RCM Report, 2024

The U.S. RCM market is projected to nearly **double by 2030**, growing from \$141.6B to

# \$272.7B

Source: U.S. Revenue Cycle Management Market Report, 2025

# Understanding the Value of RCM Automation

RCM automation helps DSOs and dental groups reduce administrative burden, increase accuracy, and accelerate reimbursements. It strengthens financial and operational functions by replacing time-consuming tasks with more reliable, automated systems. Here are ways automated RCM can enhance your revenue cycle:

## Eliminates manual errors to improve accuracy and cash flow

Manual operations for RCM-related tasks are prone to errors that directly affect cash flow.

**Automation helps reduce mistakes across the most common areas of the revenue cycle, including:**

- ✓ Insurance eligibility and verification
- ✓ Claims submission, tracking, and follow-up
- ✓ Payment posting and denial management
- ✓ Patient billing and payment collection
- ✓ Accounts receivable management
- ✓ Financial reporting and reconciling
- ✓ Pre-treatment estimates and benefits

Reducing manual touchpoints not only increases accuracy but also improves the reliability and timeliness of collections for DSOs and dental groups.



**In 2025, we'll see even greater adoption of automated RCM tools**, including dental benefits verification and payment processing, automated patient communication and retention tools, automated expense reporting tools, and AI for diagnostic accuracy and operational efficiency.



**BRIAN COLAO**  
Director  
Dykema DSO Industry Group

## Increases scalability without staff overhead

A 2025 ADA Health Policy Institute report found that **62% of dentists are concerned about staffing shortages, recruitment, and retention**. In addition, a DentalPost survey revealed that over **36% of dental professionals are considering changing jobs within the year**, highlighting the need for scalable solutions like automation to mitigate staffing issues.

As staff challenges continue across the dental industry, RCM automation provides a scalable solution that helps manage growth more efficiently without increasing overhead costs.

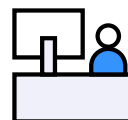


# 62%

## of dentists

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and retention.

Source: ADA Health Policy  
Institute, 2025



# 36%

## of dental professionals

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Source: DentalPost, 2025

## Frees up team time for higher-value work

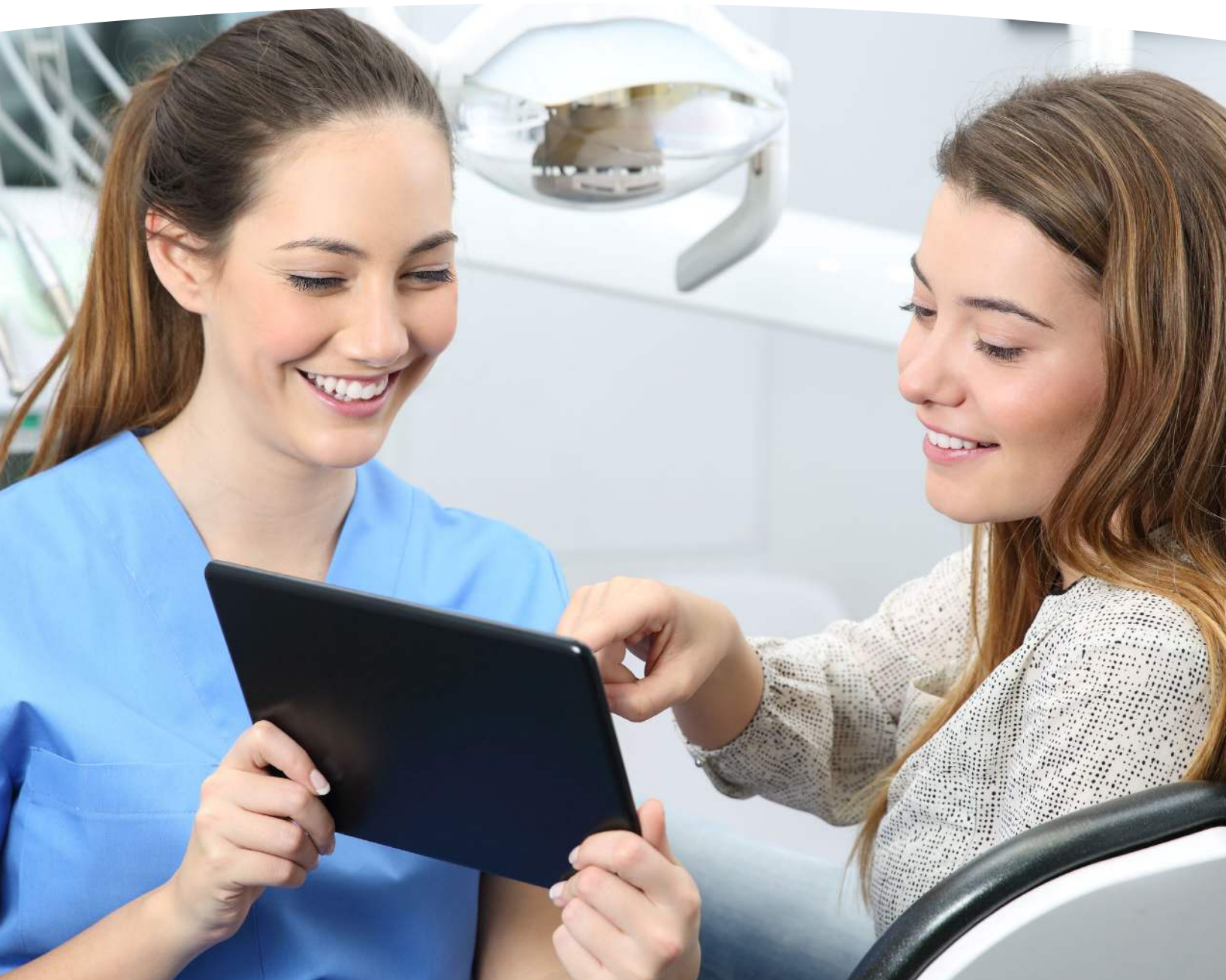
Automation reduces the burden of repetitive tasks, allowing teams to redirect their time and focus on more meaningful responsibilities. Instead of manually managing payment reminders, outstanding balances, and collections, team members can **prioritize consistent, personalized patient experience** that strengthens retention and **contributes to long-term growth**.





# Expanding the Role of RCM in Operations

The complex nature of RCM can make some decision-makers hesitant to automate what is often the most sensitive and business-critical function in the organization. However, **automation creates greater consistency across locations and strengthens the financial processes needed to support growth.**



## Key functions of RCM automation

Modern RCM software can automate a wide range of processes across billing, claims, and patient communications, helping DSOs and dental groups reduce manual work and improve overall efficiency. These include:

- ✓ Claim submission and processing
- ✓ Insurance eligibility and verification
- ✓ Treatment plan cost estimates
- ✓ Patient financial engagement and financing
- ✓ Payment posting and reconciliation
- ✓ Denial management and A/R follow-up
- ✓ Patient payments and collections
- ✓ Patient scheduling
- ✓ Reporting and analytics across locations

These capabilities not only reduce overhead but also **create new opportunities for dental organizations to improve patient experience and accelerate collections.**

"Top RCM key features for DSOs include automation, greater access to insurance information, and integrated workflow tools," said Jeremy Serfling, senior product manager at Planet DDS. "These are key to solving efficiency challenges and driving a positive patient experience."



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**JEREMY SERFLING**  
Senior Product Manager  
Planet DDS



## Easier insurance and claims processing

Automating insurance verification and claims workflows reduces delays, improves estimate accuracy, and minimizes the chance of denials. Real-time checks ensure patient benefits are confirmed before treatment begins, which builds trust and supports higher case acceptance. Dental groups can proactively flag coverage gaps or payment issues earlier in the process, helping to maintain a smoother patient experience.

## Faster billing and payment automation

The dental industry has seen a **43% increase in electronic fund transfer (EFT) payments since 2022**, indicating a steady shift toward digital-first processes. The [ADA](#) also noted that payments are not only faster and safer but also reduce costs associated with virtual credit card transactions, making them a preferred method for DSOs, dental groups, and patients.



**43%**  
increase in  
electronic fund  
transfer (EFT)  
payments  
since 2022

[2024 ADA Survey](#)



# Integrating RCM Automation into Your Tech Stack

RCM automation supports transparency and financial oversight across a growing DSO network by centralizing revenue operations within a cloud-based infrastructure. When implemented effectively, it enables organizations to manage the revenue cycle more efficiently across all locations without adding administrative burden.

To get the full benefit of RCM automation, DSOs and dental groups should consider key areas of integration:

## Cloud-based systems to centralize revenue operations

Acquiring new practices often means inheriting disconnected systems—or no real infrastructure at all—for managing the revenue cycle. Onsite servers and disjointed tools create inefficiencies that become harder to manage as organizations grow. Moving to cloud-based systems allows DSOs and dental groups to integrate revenue operations, providing broader visibility and control across all locations.

Planet DDS cloud-based Denticon practice management software offers a centralized platform tailored for DSOs, facilitating integration of revenue cycle processes across multiple locations. Its unified infrastructure supports scalable growth and enhances efficiency for operations.



## Interoperability through APIs and system integrations

Accurate data flow requires effortless communication between platforms. APIs enable different systems to integrate and share information in real time, supporting a connected RCM workflow across billing, scheduling, and patient records. If systems are siloed, it requires manual work that becomes unwieldy—**especially as organizations grow**. Open, secure APIs reduce friction and support more scalable, efficient operations.

Open API platforms like Planet DDS cloud-based DentalOS™ are at the forefront, establishing practice management software as **the central hub for all operational activities and enabling immediate communication with scheduling, billing, and patient engagement solutions**.

For Planet DDS API partners, integration supports real-time functionality across systems. “DentalXChange leverages Planet DDS’s APIs to deliver transformative RCM experiences,” said Paul Kaiser, CEO of DentalXChange. “With Planet DDS APIs, we have consistently delivered high-performing, integrated solutions to our customers with tremendous time-to-value.”



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**PAUL KAISER**  
CEO  
DentalXChange

## Connects billing with scheduling and clinical data

When automated systems are connected across billing, scheduling, and clinical workflows, data becomes more actionable. This allows decision-makers to identify financial trends, flag operational bottlenecks, and evaluate where additional investment or process improvement may be needed. With a clearer understanding of what drives revenue, DSOs and dental groups can replicate successful strategies and continuously refine operations.

Planet DDS Pay, integrated within Denticon, automates payment posting and reconciliation, reducing manual entry and errors. It supports various payment methods, including text-to-pay and mobile wallets, enhancing patient convenience and improving cash flow.

“Planet DDS Pay streamlines the RCM process by accelerating payment collection, automating the revenue cycle, and enhancing both security and the patient experience. With faster collections and optimized cash flow, practices can focus on delivering exceptional patient care,” said Eric Giesecke, CEO of Planet DDS.



Planet DDS Pay streamlines the RCM process by **accelerating payment collection**. With faster collections and optimized cash flow, practices can focus on delivering exceptional patient care.



**ERIC GIESECKE**

CEO  
Planet DDS



# Measuring the Financial Impact of RCM Automation

Quantifying the financial return of RCM automation strengthens reporting and helps organizations make better-informed decisions. According to a [2024 Dental Economics survey](#), automating **RCM processes can lead to substantial long-term savings through reduced administrative hours, lower correction costs, and improved billing accuracy, supporting better cash flow and financial stability.**

## Key metrics for tracking performance

RCM systems for dental groups and DSOs enable continuous monitoring of high-value key performance indicators (KPIs), including:

- ✓ **Accounts receivable (A/R) days:** Faster payment cycles improve cash flow and working capital management.
- ✓ **Denial rates:** Identifying and addressing trends early reduces revenue leakage.
- ✓ **Collection efficiency:** Tracking dollars collected versus billed helps maintain financial targets and identify gaps.

By tracking KPIs, evaluating time savings, and using data to support planning, DSOs and dental groups can ensure their systems are aligned to achieve financial and operational goals.

Planet DDS RCM solutions provide real-time dashboards and customizable reports, offering insights into metrics such as A/R days, denial rates, and collection efficiency. These tools enable DSOs and dental groups to make informed decisions to optimize financial success.

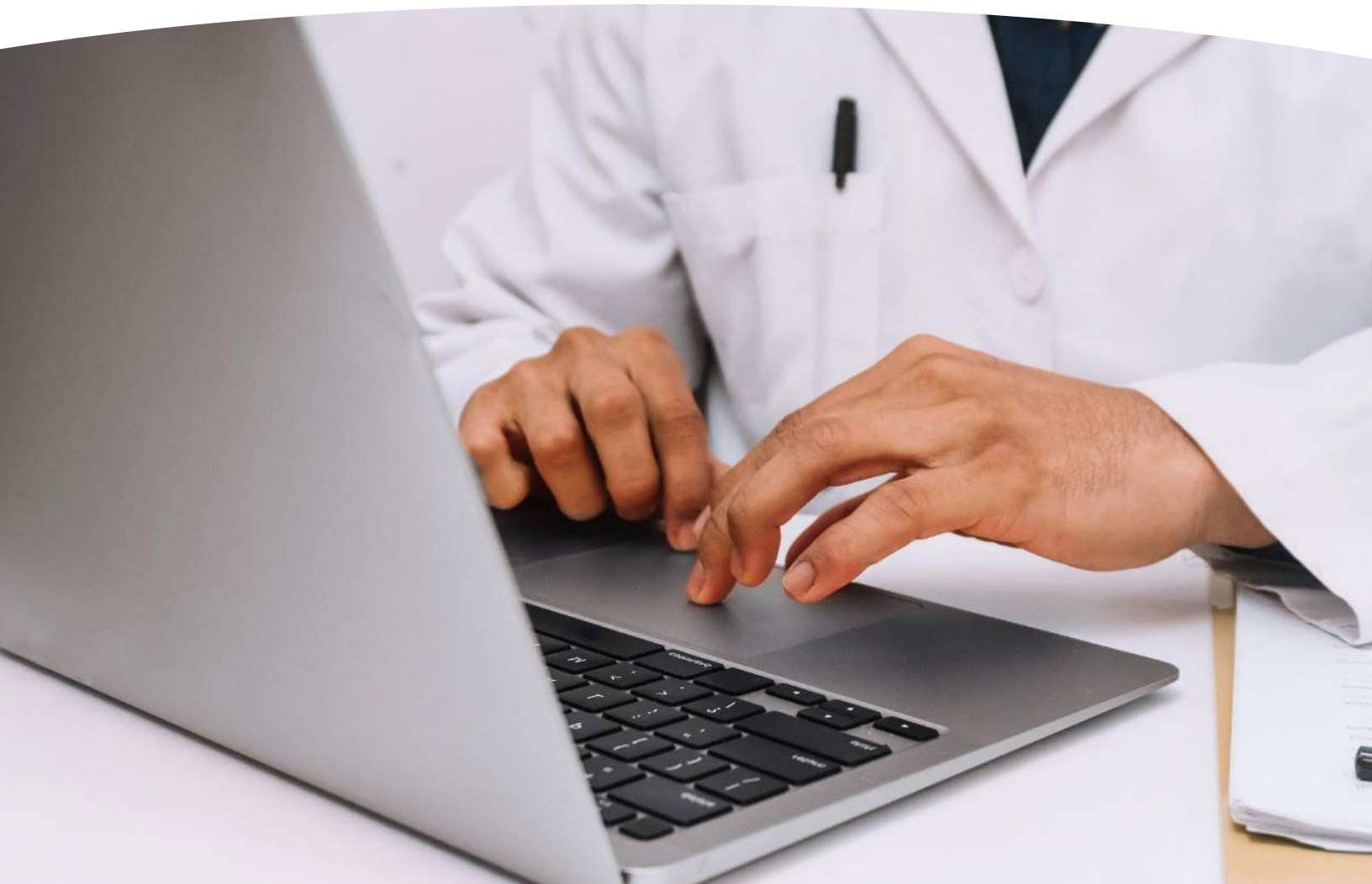


## Operational savings and time efficiencies

Automating billing and collections reduces the need for manual oversight, saving hours each week for administrative teams. Functions such as scheduled payment reminders, claims follow-up, and payment posting shift to automated systems that handle repetitive work with ease. These time savings lower staffing strain and contribute directly to improved margins.

## Data-backed forecasting and financial planning

RCM data provides insights into revenue performance, supporting more accurate forecasting and long-term budgeting. Automated systems generate consistent, high-quality financial data that helps leadership move from reactive reporting to forward-looking planning tied to revenue metrics.





# Overcoming Barriers to RCM Automation

Adopting automation across the revenue cycle can surface concerns related to change, workflow disruption, or new technologies. A structured approach to implementation—supported by leadership, communication, and training—can ease the transition and improve adoption across teams. Here are some ways to overcome these barriers:

## **Address concerns through effective change management.**

Operational changes often raise questions about job security, new responsibilities, or system reliability. Proactively addressing these concerns through clear communication and visible leadership support helps build alignment. When teams understand how automation supports their work and benefits the organization, reluctance tends to diminish.

## **Provide specialized training that builds trust in automation.**

Training is most effective when it's tied to specific job functions and workflows. Billing teams, patient financial services, and RCM leaders benefit from role-based onboarding that demonstrates how automation reduces administrative burden and improves accuracy. Support should continue after go-live to encourage adoption and address questions as they arise.

## **Choose technology that fits your organizational operations.**

The right RCM platform should fit into the organization's existing processes. Look for solutions that can be configured to reflect your workflows, minimize disruption during implementation, and evolve with your operational model. A well-aligned system will support stronger results and long-term success.

# Choosing the Right Partner for RCM Automation

Finding the right partner goes beyond selecting a software provider. DSOs and dental groups need a company with deep expertise in dental practice management software, RCM operations, automation capabilities, and integration support. Here's how to evaluate RCM partners and ensure alignment with your organization's needs:

## Select a company with proven dental and DSO expertise.

The ideal partner needs to understand the operational, clinical, and financial realities of growing dental organizations. This includes familiarity with payer models, coding requirements, and how data should be reported and tracked across locations. Partners with DSO and dental group experience are better equipped to offer relevant solutions.

## Prioritize ease of use, training, and support.

Successful implementation depends on looking for invested partners that provide structured onboarding plans, role-specific training, and responsive support. A user-friendly system paired with knowledgeable guidance helps teams get up to speed quickly while reducing downtime and friction during rollout.

## Ensure your RCM system supports scale and integration.

As DSOs grow, their RCM solution can help scale without forcing rework or disruptive change. Look for a partner that offer flexible platforms, robust APIs, and a track record of supporting growing organizations. Integration with other business systems is also essential for eliminating data silos and improving efficiency across locations.

Planet DDS supports DSOs and dental groups with purpose-built technology, strategic implementation guidance, and long-term partnerships focused on revenue cycle success. These solutions help centralize financial operations, automate complex RCM workflows, and maintain efficiency as organizations grow.

# Advance Your Dental Organization with RCM Automation

DSOs and dental groups that invest in RCM automation strengthen their financial infrastructure, streamline operations, and improve resource allocation. Automation also creates the foundation for scale—helping organizations manage growth, reduce administrative burden, and improve revenue consistency across locations for long-term success.



## Contact us today

Learn how our RCM automation solutions can accelerate your growth journey.

**BOOK A DEMO**



**cloud 9 | apteryx | denticon**

Dental software is broken. We aim to fix it. As a partner in growth for DSOs and dental groups, Planet DDS delivers a cloud-based platform designed to scale alongside growing organizations. Powered by DentalOS™, its open platform includes Denticon Practice Management, Cloud 9 Ortho Practice Management, and Apteryx Cloud Imaging. Trusted by leading DSOs and emerging dental groups nationwide, Planet DDS enables 13,000+ practices and 118,000 users to move beyond outdated legacy software with seamless integrations, optimized workflows, and scalable technology built for growth.