

Essentials Workshop

Master the basics.



2 Days - Day 1: 9:00 a.m. – 5:00 p.m.

Appointment Book

- Scheduling appointments for new and existing patients
- Rescheduling, breaking, and deleting appointments
- Completing appointments using the new Dentrix G6 features
- Using appointment lists (ASAP/Open List, Unscheduled List)
- Scheduling events and closing operatories
- Setting up Appointment Book views using the Dentrix G6 enhancements
- Setting up the practice calendar

Family File

- Creating a new family and adding new family members
- Changing the head of house
- Assigning medical alerts using the redesigned Dentrix G6 medical alerts feature
- Attaching insurance to a patient and family
- Entering other patient information (employer, billing type, patient note, referrals, patient alerts)

Continuing Care

- Editing continuing care defaults
- Attaching continuing care to patients and procedure codes
- Scheduling continuing care appointments
- Troubleshooting continuing care messages
- Generating the Continuing Care List

Ledger

- Posting procedures in the Ledger
- Posting patient payments
- Splitting payments by provider and family member (new in Dentrix G6)
- Posting adjustments
- Creating insurance claims
- Posting insurance payments
- Closing the month

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2 Day - Day 2: 9:00 a.m. – 5:00 p.m.

Office Journal

- Recording patient contact
- Adding a staff reminders
- Viewing and deleting Office Journal entries

Patient Chart

- Posting treatment in the Patient Chart
- Using the Auto-State button
- Completing treatment-planned procedures
- Editing, deleting, invalidating, and referring procedures
- Entering clinical notes

Treatment Planner

- Creating a new treatment plan case
- Creating alternate treatment cases
- Ordering procedures by visit
- Updating case statuses
- Attaching consent forms to a case

Document Center

- Acquiring Documents
- Entering document information
- Modifying document attachments
- Signing documents
- Managing unfiled documents
- Emailing and exporting documents

Office Manager

- Using the Batch Processor
- Generating Billing Statements
- Generating 10 basic reports
 - Day Sheet
 - Production Summary Report
 - Aging Report
 - Insurance Claim Aging Report
 - Procedures Not Attached to Insurance Report
 - Insurance Claims to Process Report
 - Practice Analysis Report
 - Payment Summary
 - Adjustment Summary
 - Unscheduled Treatment Plans Report