



ESSENTIALS WORKSHOP

Course Outline

1st Day: 9:00am – 5:00 pm

Office Manager

- Generating reports
- Printing and displaying reports
- Setting up providers

Appointment Book

- Finding an available appointment time
- Locating an existing appointment
- Scheduling an appointment for new and existing patients
- Rescheduling, deleting, or breaking an appointment
- Setting an appointment complete
- Using Unscheduled and ASAP lists
- Printing Route Slips
- Setting up the Appointment Book

Family File

- Creating a new family
- Assigning medical alerts
- Entering employers
- Attaching referrals to patients
- Creating patient alerts
- Adding patient notes

Patient Chart

- Posting existing, completed, or treatment-planned procedures
- Editing/deleting procedures
- Changing dentition
- Printing Patient Chart reports

Treatment Planner

- Creating a treatment plan case
- Ordering procedures by visit
- Assigning statuses to cases
- Attaching consent forms to treatment plan cases
- Updating treatment Plan fees

Ledger

- Posting/editing procedures
- Posting/editing payments/adjustments
- Setting up the Ledger

2nd Day: 9:00am – 5:00 pm

Office Journal

- Changing the Office Journal view
- Recognizing automatic entries
- Adding, editing, and deleting manual entries

Document Center

- Acquiring and modifying documents
- Managing unfiled documents
- Signing documents
- Printing/exporting documents
- Viewing documents
- Setting up the Document Center
- Using Patient Picture
- Using the screen capture tool (new G5 feature)

Continuing Care

- Editing continuing care defaults
- Attaching continuing care to procedure codes
- Attaching continuing care to patients and appointments
- Using the Continuing Care Display list
- Printing continuing care cards

Insurance Management

- Adding new insurance plans
- Attaching primary and secondary insurance to patients
- Creating insurance claims
- Entering insurance payments
- Modifying benefits used
- Coverage and payments tables

Practice Management

- Generating the Day Sheet
- Generating the Deposit Slip
- Creating bulk insurance claims
- Running month end
- Generating the Aging Report
- Generating billing statements