



# ESSENTIALS WORKSHOP

## Course Outline

### First Day: 9:00 am – 5:00 pm

#### Office Manager

- Printing and displaying reports
- Setting up providers
- Setting up definitions and Dentrix preferences
- Using the Practice Analysis
- Learning the available reports

#### 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



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### Second Day: 9:00 am – 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

#### 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