

Health History & Patient Record Management

Understand your patients to serve them better.



1 Day: 9:00 a.m. – 5:00 p.m.

Managing Patient Health History

- Assigning and customizing medical conditions, allergies, and patient-reported medications
- Marking Health History items as critical and setting pop-up alerts
- Adding and editing contact information for a patient's physician, preferred pharmacy, and emergency contact
- Updating patient health history information using Questionnaires

Managing Patient Prescriptions

- Creating, viewing prescriptions in Dentrix
- Refilling and tracking medicines prescribed to patients

Using the Document Center

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

Managing Patient Alerts & Notes

- Accessing and viewing patient alerts
- Attaching patient alerts to patients or the entire family
- Using Dentrix Notes
- Creating custom note templates

Using the Office Journal

- Manually adding a journal entry
- Viewing Office Journal entries
- Editing/deleting journal entries
- Adding staff reminders to the Office Journal

Managing Family Records & Relationships

- Creating a new family record
- Setting Head-of-House information
- Editing family relationships
- Handling complex family relationships
- Changing a patient status to archived or inactive
- Deleting patients and families

Family File Tips & Tricks

- Select Patient shortcuts and additional options
- Accessing patient information using the More Info button
- Adding additional addresses to a family
- Using privacy request options
- Requiring referral sources for new patients
- Attaching patient pictures