

# Dentrix Essentials

Put the power of Dentrix to work for you.



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 appointment lists (ASAP/Open List, Unscheduled List)
- Scheduling events and closing operatories
- Setting up Appointment Book views
- Setting up the practice calendar

## Family File

- Creating a new family and adding new family members
- Changing the head of house
- 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
- 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
- Posting adjustments
- Creating insurance claims
- Posting insurance payments
- Closing the month using the Task Scheduler

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2 Days - 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