



CLINICAL

Clinical Test Blueprint

- ✓ Clinical Charting
- ✓ Clinical Note Management



Overview

Who should earn this Clinical certificate?

- Front office and clinical staff who manage patient charts
- Anyone who wants to understand how clinical charts are set up and managed in Dentrix

What's on the test?

The test for clinical charting addresses skills in two areas. They are listed here, with an approximate percentage of how much they are represented in the certificate test:

- Clinical Charting (60%)
- Clinical Note Management (40%)

Number of questions: 33

Time limit: 50 minutes

Passing score: 79%

How can I prepare for the test?

The skills and tasks related to this test are listed below. Please review them to help you understand and prepare for items on the test. Note tasks that you are unfamiliar with, then study them. For online study resources, training opportunities and a program overview, read the Mastery Tracks website.

How does the clinical test fit in Dentrix Mastery Tracks?

The Clinical Charting test and the Treatment Planning test make up the clinical mastery track. Successfully completing the two tests brings you the recognition and benefits of being a Dentrix Clinical Specialist.



Clinical Charting Skill Summary (60% of test)

The clinical charting portion of the test addresses competence in the following Dentrax skills:

- Customize clinical information and options
- Customizing the Chart window
- Setting up prescriptions
- Viewing clinical information
- Charting clinical information
- Create, edit, and clear chart notations
- Managing prescriptions
- Generating reports about patient clinical data

To prepare for the test, you should be able to perform operations and demonstrate understanding of the following detailed tasks and concepts:

A. Customizing clinical information and options

1. Set up practice resources
 - a. Add and edit practice information
 - b. Add, edit, and delete providers
2. Set up clinical definitions
 - a. Identify the purpose of each of the following definitions: procedure code categories, paint types, dental diagnostic code categories
 - b. Add and edit definition types
 - c. Identify the consequences of deleting a definition
3. Set up procedure codes
 - a. Add and edit procedure codes
 - i. Enter a description
 - ii. Enter code names
 - iii. Set treatment flags
 - Explain the function of the Difficult Proc flag
 - Explain the function of the Condition flag
 - Explain the function of the Remove Tooth flag
 - Explain the function of the Show in Chart flag



- iv. Select a procedure category
 - v. Select a treatment area
 - vi. Select a paint type
 - vii. Set up procedure code notes
 - Identify the difference between procedure code progress notes and clinical notes
 - Add, edit, and delete a Procedure Code Progress note
 - Select copy note option for Procedure Code Progress notes
 - Add, edit, and delete a Recommendation note
 - Attach a recommendation document to a procedure code
 - Select to print a recommendation note on a walkout statement
 - viii. Enter lab and material expenses
 - ix. Flag a code for medical cross coding
 - x. Save a procedure code
 - xi. Navigate between codes using the arrow buttons.
4. Set up clinical preferences
- a. Set default dentition age
 - b. Set Show Close Message
 - c. Set International Tooth Numbering option
5. Set up dental diagnostic codes
- a. Enter a description
 - b. Enter a diagnostic code
 - c. Explain the function of the Remove Tooth flag
 - d. Select a diagnostic category
 - e. Select a treatment area
 - f. Select a paint type
 - g. Set up Diagnostic Code notes
 - i. Add, edit, and delete Diagnostic Code Progress notes
 - ii. Select Copy Note option when code is posted to a patient
 - iii. Select append note options when code is attached to a procedure
 - iv. Save a diagnostic code
 - v. Advance to the next code
6. Set up multi-codes
- a. Enter a description
 - i. Enter a multi-code
 - ii. Enter an abbreviated description
 - iii. Select an appointment type



- iv. Set chair, assistant, and provider time for a multi-code
 - v. Set the multi-code type
 - vi. Add, edit, and delete procedure codes from a multi-code
 - Select treatment areas
 - vii. Add, edit, and delete diagnostic codes from a multi-code
7. Set up custom note templates
- a. Identify the purpose of the Procedure Notes custom notes templates
 - b. Add, edit, and delete custom note templates

B. Customizing the Chart window

1. Identify the eight different areas of the patient chart, including the following: toolbars, graphic chart, procedure codes, procedure buttons, status buttons, the progress notes panel, progress notes control buttons, and the clinical notes panel
2. Set up chart display options
 - a. Select color theme
 - b. Create a new theme
 - i. Set paint colors
 - ii. Set screen colors
 - iii. Set gradient option
 - iv. Set gingiva line options
 - v. Set legend option
 - vi. Set tooth style
 - vii. Set progress note colors
 - Select Use Paint Colors for Progress Notes option
 - Set color for general clinical notes
 - Set color for exam notes
 - viii. Save a theme
 - ix. Rename and delete themes
3. Set up procedure buttons
 - a. Add, edit, and delete procedure buttons
 - i. Select procedure code or diagnostic code
 - ii. Select tooltip text type
 - Add custom text
 - iii. Select button face
 - Add and edit button images
 - Set button image from button catalog
 - Set option to use Code Text



- b. Manage button set
 - i. Select an existing button set
 - ii. Create a new button set
 - iii. Move buttons up or down in the set list
 - iv. Rename or delete a button set
 4. Set up procedure code category buttons
 - a. Show or hide a code
 5. Set up chart layouts
 - a. Given a scenario, customize the chart layout
 - b. Save a customized layout
 - c. Select a saved layout
 - d. Edit and delete saved layouts
 6. Using the Chart toolbar
 - a. Customize toolbars
 - i. Create, edit, and delete toolbars
 - ii. Add and remove buttons from a toolbar
 - iii. Arrange buttons on a toolbar
 - iv. Show or hide toolbars
 - b. Switch to another Dentrix module
 - c. Open DxWeb
 - d. Select a patient
 - e. Send quick correspondence
 - i. Send an email
 - ii. Send a Quick Letter
 - iii. Generate a Quick Label
 - f. Access and modify patient information
 - i. Access patient information using the More Info button
 - ii. Switch to another family member in the More Information dialog box
 - iii. View a selected appointment in the Appointment Book
 - iv. Open the continuing care module
 - v. Switch to the Ledger
 - vi. Create an addressed email
 - vii. Dial a phone number
 - viii. Open the Office Journal
 - g. Add, edit, and inactivate health history conditions and allergies
 - h. View past health history conditions and allergies
 - i. View, add, edit, and delete patient alerts



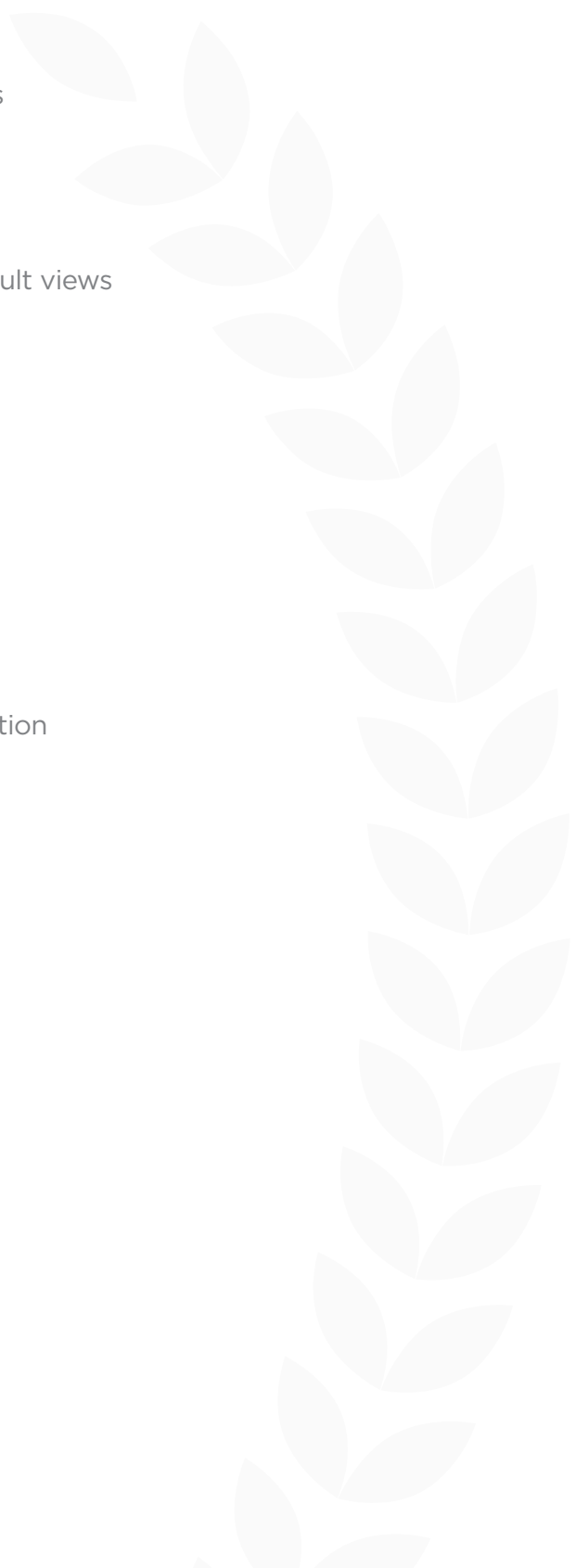
- j. View, add, edit, and delete patient picture
- k. View, add, edit, and delete patient referrals
- l. Access the Treatment Manager
- m. Access the Treatment Planner
- n. Access the Lab Case Manager
- o. Access the Perio Chart
- 7. Select invalidated conditions/diagnoses default views
- 8. Select the Select Patient dialog box view
- 9. Select the Chart printer

C. Setting up prescriptions

- 1. Add, edit, and delete prescriptions
- 2. Set up a prescription printer

D. Viewing clinical information

- 1. Select Progress Notes views
 - a. Select treatment information to view
 - b. Expand or collapse view information
 - c. Identify the purpose of the default sort option
 - d. Filter view by selected teeth
 - e. Filter view by date
 - f. Filter view by provider
- 2. Select Dentrix Graphic Chart views
 - a. Use zoom views
 - b. Use 3D views
 - i. Use arch views
 - Move teeth
 - Rotate teeth
 - ii. Use model views
 - Rotate view
 - Show or hide gums
 - Open or close mouth
 - c. Paint by progress notes
- 3. Select Panel views
- 4. Select Chart Notation views
- 5. Restore startup settings
- 6. Change patient dentition





E. Charting clinical information

1. Enter treatment information, including: existing, existing other, completed, and treatment-planned procedures
 - a. Select a provider
 - b. Select tooth or teeth
 - i. Clear selected teeth
 - c. Select procedure(s) using a variety of methods, including: choose a code from the procedure code category panel and choose a code using the procedure buttons
 - d. Enter treatment area
 - e. Select treatment status using a variety of methods, including: post treatment using the status buttons, post treatment using the auto-state button
2. Edit and delete treatment information, including: existing, existing other, completed (not in history), and treatment-planned procedures
 - a. Edit treatment date
 - b. Edit procedure code
 - c. Edit treatment area
 - i. Edit surface painting
 - d. Edit procedure status
 - e. Edit provider
 - f. Add, edit, or remove diagnostic codes
 - g. Add, edit, or delete a procedure note
 - h. Insert custom procedure note
 - i. Add, edit, or remove related referral
 - j. Delete a procedure
3. Invalidate procedures in history
 - a. Identify the purpose for invalidating a procedure in history
 - b. Invalidate a procedure
4. Complete treatment-planned procedures
 - a. Identify the correct method for completing a treatment planned procedure
 - b. Complete treatment-planned procedures

F. Creating, editing, and clearing chart notations

1. Select pen settings
2. Add pen notations
3. Select highlighter settings
4. Add highlighter notations



5. Select eraser settings
6. Erase annotations
7. Move annotations
8. Enlarge or minimize annotations

G. Managing prescriptions

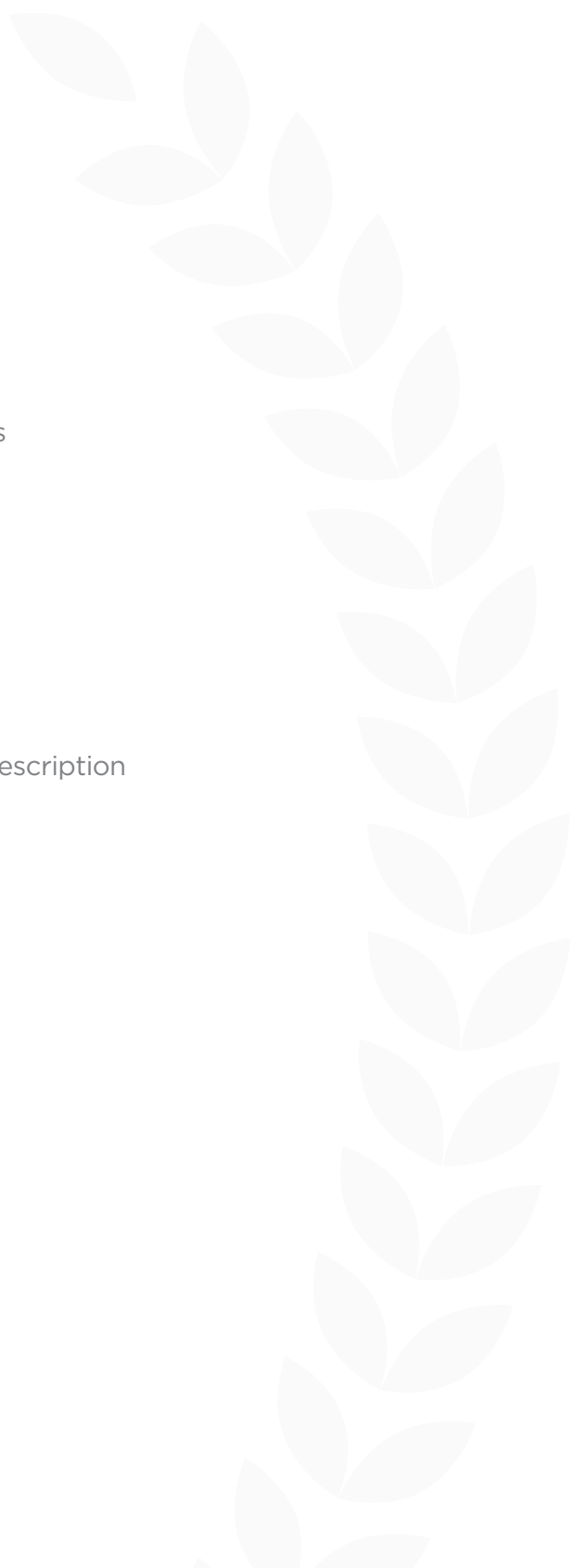
1. Create a prescription
 - a. Select a prescription type
 - b. Customize the prescription information
 - i. Modify drug name
 - ii. Modify dosage interval and instructions
 - iii. Modify dispense amount
 - iv. Set generic options
 - v. Add, edit, or delete prescription note
 - c. Select prescriber
 - d. Print prescription
2. View prescriptions
3. Refill a prescription
4. Delete a prescription
 - a. Identify the consequences of deleting a prescription
5. Access patient information remotely
 - a. Access Dentrix Mobile
 - b. Search for a patient
 - c. View prescription information

H. Generating reports about patient clinical data

1. Print the graphic chart
2. Print clinical notes
3. Print progress notes
4. Print the Prescriptions Report
5. Print and reprint a prescription

I. Generating reports about practice clinical data

1. Generate the Procedure Code List
2. Generate the Multi-Code List





Clinical Note Management Skill Summary (40% of test)

The appointment scheduling portion of the test addresses competence in the following Dentrix skills.

- Understanding clinical notes
- Setting up clinical notes
- Viewing clinical notes
- Adding, editing, and deleting clinical notes
- Signing a clinical note
- Adding an addendum to clinical notes
- Copying clinical notes
- Printing Clinical Notes

To prepare for the assessment, you should be able to perform operations and demonstrate understanding of the following detailed tasks and concepts:

A. Understanding clinical notes

1. Identify the purpose of clinical notes
2. Identify the differences between clinical notes and procedure notes

B. Setting up clinical notes

1. Set up clinical notes categories
 - a. Add a new category
 - b. Rename a category
 - c. Delete a category
 - d. Organize categories
2. Set up clinical note prompts
 - a. Identify the purpose of clinical note prompts
 - b. Add a new prompt
 - i. Enter a prompt name
 - ii. Enter prompt text
 - iii. Given a scenario, select the appropriate Response Type and enter the appropriate response options
 - c. Edit a prompt
 - d. Delete a prompt



3. Set up clinical note templates
 - a. Identify the purpose of a clinical notes template
 - b. Add a clinical note template
 - i. Given a scenario, choose the correct category for a clinical note template
 - ii. Enter a template name
 - iii. Select Clinical Note Prompts
 - Select a clinical note prompt
 - Remove a clinical note prompt
 - Organize clinical note prompt order
 - Insert prompt in text
 - iv. Add clinical note text
 - c. Edit a clinical note template
 - d. Delete a clinical note template
4. Set up signature device

C. Viewing clinical notes

1. Displaying clinical notes in the progress notes
2. Viewing clinical notes
 - a. Locate and view a specific clinical note
 - b. Collapse and expand clinical note tree

D. Adding, editing, and deleting clinical notes

1. Create new clinical note
 - a. Add, edit, and delete clinical note text
 - b. Insert date and time
 - c. Add clinical note template
 - d. Save clinical note
2. Edit clinical note
 - a. Identify the conditions that would prevent you from editing a clinical note
 - b. Edit clinical note
 - c. Change provider for a selected note
 - d. Change the date for a selected note
3. Delete a clinical note
 - a. Identify the conditions that would prevent you from deleting a clinical note



E. Signing a clinical note

1. Identify the purpose of signing a clinical note
2. Identify the devices you can use to sign a clinical note
3. Sign a clinical note

F. Adding an addendum to clinical notes

1. Identify the purpose of the clinical note addendum
2. Add an addendum to a clinical note

G. Copying clinical notes

1. Copy a selected note to the Windows clipboard
2. Copy all notes for a patient to the Windows clipboard

H. Printing clinical notes

1. Print clinical note report
 - a. Print report for a date range
 - b. Print report for specified patients
 - c. Print report for selected provider
 - d. Select patient privacy options
2. Print clinical notes with the progress notes

