



Patient Information Essentials

Test Blueprint

- ✓ Patient Records
- ✓ Referral Management
- ✓ Document Management



Overview

Who should take this Patient Information Essentials test?

- Dentrrix users with less than a year experience with Dentrrix, or that have a limited role with patient information.
- Team members who manage patient information, including information from referrals, and storage in the document center.
- Anyone who wants to understand how patient information is set up and managed in Dentrrix.

What's on the test?

The test for patient information essentials addresses skills in three areas. They are listed here, with an approximate percentage of how much they are represented in the certificate test:

- Patient Records (65%)
- Referral Management (10%)
- Document Management (25%)

Number of questions: 15

Time limit: 25 minutes

Passing score: 80%

How can I use this blueprint to 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, visit the Mastery Tracks website.



Overview (continued)

How does this test fit in Dentrax Essentials?

The Patient Information Essentials test is one of four tests in Dentrax Essentials:

- Clinical Essentials
- Financial Essentials
- Patient Information Essentials
- Scheduling Essentials

Successfully completing this test means you can do basic tasks associated with using Dentrax in a records environment. You can also take the other tests to measure your basic skills in other Dentrax functions in the dental office.



Patient Records (65% of test)

The patient record portion of the test addresses competence in the following Dentrax skills:

- Using the Family File window
- Using the Family File toolbar
- Creating a patient record
- Selecting and clearing medical alerts
- Adding, editing, and clearing employer information
- Adding, editing, and clearing insurance information
- Adding, editing, and deleting patient notes
- Entering referral information

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

A. Using the Family File window

1. Identify the meaning of the information displayed in the Family File window
2. Access patient information entry fields
3. Use the Family Member List

B. Using the Family File toolbars

1. Switch to another Dentrax module
2. Open DxWeb
3. Send quick correspondence
 - a. Send an email
 - b. Send a Quick Letter
 - c. Generate a Quick Label
4. Access and modify patient information
 - a. Access patient information using the More Info button
 - b. View the Family Appointment list using the Other Appt(s) button
 - c. View and modify insurance claim information using the Ins Claim Info button
 - d. View and modify lab case information using the Patient Lab Cases button
 - e. Print the Patient Notes report



5. Assign patient alerts
 - a. Add, edit, and delete patient alerts
 - b. View expired alerts
 - c. Suspend alerts on a workstation
- C. Creating a patient record**
 1. Add a new head of household record
 - a. Add, edit, and delete name information
 - b. Select patient status
 - c. Add, edit, and delete personal information
 - d. Add, edit, and delete address information
 - e. Add, edit, and delete phone number information
 - f. Select office information settings
 - g. Select Privacy Requests options
 - h. Add, enter, and delete visit information
 2. Add family members
 3. Add a new patient with the New Patient Appt feature
 - a. Create a new family
 - b. Add to an existing family
- D. Selecting and clearing medical alerts**
- E. Adding, editing, and clearing employer information**
 1. Enter new employer information
 2. Select an existing employer
- F. Adding, editing, and clearing insurance information**
 1. Assign insurance to a subscriber/dependent
 2. Assign secondary insurance to a subscriber/dependent
 3. Assign medical insurance to a subscriber/dependent
 4. Assign secondary medical insurance to a subscriber/dependent
 5. Clear dental and medical insurance from a subscriber/dependent
 6. Enter deductibles met/benefits used
- G. Adding, editing, and deleting patient notes**
 1. Identify the purpose of the patient note field
 2. Hide and reveal patient notes
- H. Entering referral information**
 1. Add, edit, and delete referred by other sources
 2. Add, edit, and delete referred to other sources
 3. Select a referral source



Referral Management

(10% of test)

The referral management portion of the test addresses competence in the following Dentrax skills:

- Setting up referral sources
- Assigning referrals to a patient
- Maintaining referral sources

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

A. Setting up referral sources

1. Add and edit a Referred By Doctor/Other source using the Referral Maintenance utility
2. Add and edit a Referred to Doctor source using the Referral Maintenance utility
3. Copy a referral source

B. Assigning referrals to a patient

1. Assigning referrals from the Family File
 - a. Add and edit a referral by patient
 - b. Add and edit a referral by Doctor/Other
 - c. Add and edit a referred to
 - d. Clear a referral
2. Assigning referrals from the Patient Chart
 - a. Identify whether a procedure code has a referral attached by looking at the progress notes
 - b. Set Related Referral
 - c. Edit a procedure code
 - d. Remove a referral from a procedure code
 - e. Show or hide referrals in the Progress Notes

C. Maintaining referral sources

1. Delete a referral source
 - a. Identify the conditions that would prevent you from deleting a referral source
 - b. Given a scenario, complete the necessary operations to delete a referral source that has been assigned to patients
2. Add, edit, and delete a referral note
3. Open the Office Journal for a referral source



Document Center

(25% of test)

The Document Center portion of the test addresses competence in the following Dentrax skills:

- Using the Family File window
- Using the Family File toolbar
- Creating a patient record
- Selecting and clearing medical alerts
- Adding, editing, and clearing employer information
- Adding, editing, and clearing insurance information
- Adding, editing, and deleting patient notes
- Entering referral information

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

A. Understanding the Document Center module

1. Identify the purpose of the Document Center
2. Open the Document Center
 - a. Open Document Center with a patient selected
 - b. Open Document Center without a patient selected
3. Use the Document Center tool bar
 - a. Customize the tool bar
 - b. Switch to another Dentrax module
 - c. Open DxWeb
 - d. Send quick correspondence
 - e. Access and modify patient information
 - f. Access medical and patient alerts
 - g. Access patient pictures
 - h. Access referral information
4. Identify the location and purpose of the different areas of the Document Center
 - a. Identify the location and purpose of the Document Tree Pane
 - b. Identify the location and purpose of the Document Preview Pane



B. Acquiring documents

1. Import documents from a device
 - a. Identify devices that HSPS has tested and recommends for use with the Document Center
 - b. Identify the recommended resolution for scanning documents into the Document Center
 - c. Complete the operations to acquire a file from a device
 - d. Given a scenario, identify the appropriate scan type for the document you want to acquire
2. Import documents from file
 - a. Identify the types of files that can be imported into the Document Center
 - b. Acquire an existing file
3. Paste documents from the Windows clipboard
 - a. Identify the different keyboard commands that can be used to capture a screen to the Windows clipboard including, the Print Screen button and Alt + Print Screen button
 - b. Identify the keyboard and menu commands that can be used to copy text to the Windows clipboard, including Ctrl + V and Edit > Copy
 - c. Identify the difference between using the Print Screen button and the Alt + Print Screen button
 - d. Acquire a file from the Windows clipboard
4. Import images from patient picture
5. Print a document to the Document Center
 - a. Identify where you can find documents printed to the Document Center
 - b. Print a document to the Document Center
6. Add and edit document information
 - a. Identify the conditions that would prevent you from modifying document information
 - b. Modify attachments
 - c. Select a document type
 - d. Enter a description
 - e. Enter a note

C. Managing unfiled documents

1. Identify the three ways a document becomes an unfiled document, including Printing to the Document Center, acquiring a new document from the Unfiled Documents window, removing all attachments from a document
2. Print a file to the Document Center
3. Open the Document Center Unfiled Documents window
4. Locate a file in the Unfiled Documents window



5. Attach an unfiled document to its source(s)
6. Combine documents
 - a. Identify the types of documents that can be combined using the Combine Documents feature
 - b. Use the Ctrl or Shift keys to select multiple documents
 - c. Use the refresh command to preview combined documents
7. Delete documents from the Unfiled Documents window
 - a. Use the Ctrl or Shift keys to select multiple documents

D. Working with acquired documents

1. Modify an image file
 - a. Copy to the Windows clipboard
 - b. Add a page from device, file or the Windows clipboard
 - c. Delete a page
 - d. Adjust Color
 - e. Crop an image
 - f. Remove spots
 - g. Rotate image
 - h. Indicate orientation in the mouth
2. Email a document
 - a. Identify MAPI-compliant email programs that will allow you to use the email function in the Document Center
 - b. Identify the information that is included in an email in addition to the document attachment
3. Export a document
 - a. Identify the types of files that are created when you export a text or image file
4. Print a document
5. Sign a document
 - a. Identify the purpose for the document signature option
 - b. Identify the meaning of the symbols used to indicate a document's signature status
 - c. Identify the equipment that can be used to capture a signature for a document
6. Delete a document
 - a. Identify the conditions that would prevent you from deleting a document