



FRONT OFFICE

# Patient Information Test Blueprint

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- ✓ Patient Record Management
- ✓ Document Management
- ✓ Forms Management
- ✓ Referral Management
- ✓ Office Journal



# Overview

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## ***Who should take the Patient Information test?***

- Team members who manage patient information, including information from questionnaires and referrals, and storage in the document center.
- Anyone who wants to understand how patient information is set up and managed in Dentrix.

## ***What's on the test?***

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

- Patient Record Management (25%)
- Document Management (25%)
- Forms Management (Questionnaires) (20%)
- Referral (20%)
- Office Journal (10%)

Number of questions: 57

Time limit: 75 minutes

Passing score: 82%

## ***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 Web site.

## ***How does the patient information test fit in Dentrix Mastery Tracks?***

The patient information test, along with the scheduling and continuing care tests, make up the front office mastery track. Successfully completing the three tests brings you the recognition and benefits of being a Dentrix Front Office Specialist.



# Patient Record Management Skill Summary (25% of test)

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

- Patient record setup
- Using the Family File window
- Using the Family File toolbar
- Creating a patient record
- Handling unique family relationships
- Selecting and clearing medical alerts
- Adding, editing, and clearing employer information
- Adding, editing, and clearing insurance information
- Adding, editing, and deleting patient notes
- Assigning a billing type to a family
- Entering an initial balance
- Entering referral information
- Attaching a patient picture
- Managing family records and relationships
- Sending patient letters
- Generating reports about patients
- Access patient information remotely

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

## A. Patient record setup

1. Set up providers
  - a. Add and edit providers
  - b. Set default provider
2. Set Auto-Chart number defaults
3. Set social security number security options
4. Add and edit medical alerts
5. Add and edit billing types



6. Select a patient
  - a. Set the select patient dialog default
  - b. Identify the different ways that you can search for a patient
  - c. Search for archived patients
7. Set up remote access to patient information
  - a. Set up WebSync
  - b. Upload all patients
  - c. Log in to Dentrix Mobile
- B. 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
- C. Using the Family File toolbar**
  1. Switch to another Dentrix 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
- D. 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
- E. Handling unique family relationships**
  1. Create a new family where the responsible party is not a member of the family
  2. Create a new family where the insurance subscriber is not a member of the family
- F. Selecting and clearing medical alerts**
- G. Adding, editing, and clearing employer information**
  1. Enter new employer information
  2. Select an existing employer
- H. 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
- I. Adding, editing, and deleting patient notes**
  1. Identify the purpose of the patient note field
  2. Hide and reveal patient notes
- J. Assigning a billing type to a family**
  1. Identify the use and purpose of billing types
- K. Entering an initial balance**
  1. Identify the purpose for entering an initial balance
  2. Enter aged balance amounts
  3. Enter last payment amount and last payment date
- L. 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
- M. Attaching a patient picture**
  1. Add a patient picture
    - a. Import a picture from file
    - b. Import a picture from a device
    - c. Copy a picture from the Windows clipboard
    - d. Capture a screen
  2. Edit a patient picture
    - a. Rotate image
    - b. Adjust image light and color properties
    - c. Crop image
  3. Delete a picture



## N. Managing family records and relationships

1. Set head-of-household
  - a. Identify the primary characteristics of a head-of-household or guarantor
  - b. Identify the difference between a head-of-household and an insurance subscriber
  - c. Identify the conditions that would prevent you from changing a head-of-household
  - d. Change a head-of-household
2. Edit family relations
  - a. Identify the conditions that would prevent you from editing family relations
  - b. Given a family editing scenario, identify how Dentrax will handle insurance information
  - c. Identify the conditions that must be met before editing family relations for a head-of-household
  - d. Given a scenario, perform the appropriate steps to separate accounts
  - e. Given a scenario, perform the appropriate steps to combine two accounts
3. Change a patient status to Archived or Inactive
  - a. Identify which pieces of information are saved after a patient is archived
  - b. Identify which pieces of information are cleared when a patient is archived
  - c. Identify where in Dentrax cleared information is noted
  - d. Given a situation, choose whether a patient should be archived or inactivated; perform the operation
  - e. Change status to Inactive
  - f. Archive a patient
  - g. Reactivate archived patients
4. Delete patients
  - a. Identify the significant difference between deleting patients and archiving patients
  - b. Given a scenario, choose whether a patient should be deleted or archived; perform the operation
  - c. Identify the conditions that must be met before a patient can be deleted
  - d. Delete a patient
5. Delete Families
  - a. Identify the conditions that must be met before a family can be deleted
  - b. Delete a head of household

## O. Sending patient letters

1. Generate patient birthday letters, including: Birthday – Adult and Birthday – Child letters
2. Generate inactive patient letters, including: Inactive – All, Inactive – Recall, and inactive Status



3. Generate welcome letters, including: Welcome – After 1st visit and Welcome – Before 1st visit
4. Generate congratulatory letters, including: Birth in Family, Graduation, and Marriage
5. Generate Patient Info Verification letter

### **P. Generating reports about patients**

1. Generate the Patient List
  - a. Generate a Standard List
  - b. Generate a Chart Number Report
  - c. Generate Mailing Labels
  - d. Generate Chart Labels
2. Generate the Birthday List
  - a. Generate a birthday list by birth date range
  - b. Generate birthday mailing labels
3. Generate the New Patient List
  - a. Generate a new patient standard list by first visit date
  - b. Generate chart labels by first visit date
  - c. Generate new patient mailing labels by first visit date
4. Generate the Inactive Patient List
  - a. Generate the Inactive Patient List using different filters, including by continuing care and future appointments, last visit date, or patient status
  - b. Generate inactive patient mailing labels
5. Generate the Archived Patient List
  - a. Generate a Standard List
  - b. Generate a Chart Number Report
6. Generate the Patient Notes Report
  - a. Identify the purpose of the following notes: Patient Alert Notes, Family Alert Notes, Perio Exam Notes, Appointment Notes, Patient Note, Medical alerts, Continuing Care Notes, Insurance Claim Notes, Insurance Plan Notes, Payment Plan Notes, Guarantor Notes, Guarantor Statement Notes, Lab Case Notes
  - b. Given a scenario, generate the Patient Notes Report to include designated notes by description.
  - c. Given a scenario, generate the Patient Notes Report to print specific notes for a date range
7. Generate the Patient Privacy Requests List
8. Generate the Practice Advisor – New Patient Analysis Report

### **Q. Access patient information remotely**

1. Access Dentrax Mobile
2. Search for a patient
3. View patient information



# Document Management Skill Summary (25% of test)

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

- Understanding the Document Center module
- Setting up the Document Center
- Acquiring documents
- Managing unfiled documents
- Working with acquired documents

To prepare for the test, 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. Setting up the Document Center

1. Activate or de-activate the Simple Select Patient option
2. Set Preferences (Office Manager)
  - a. Set Show Close Message option
  - b. Set Copy Billing Statements to Document Center option



3. Set preferences (Document Center)
    - a. Set or view the Documents Directory path
    - b. Select an e-mail attachment file format
    - c. Select the desired compression type
    - d. Select an electronic signature device
  4. Set up printers
    - a. Select printer
    - b. Set page scaling size
    - c. Select page footer options
  5. Set up the Document Center Display options
    - a. Set background color options
    - b. Select the document sort order
    - c. Select Zoom options
  6. Set up document types
    - a. Add, edit, and delete a document type
  7. Set Document Center View options
    - a. Expand and collapse the Document Tree list
    - b. Select source(s) to view, including by patient, provider/staff, employer, referred to, referred by, medical insurance, and dental insurance
    - c. Set View filters
    - d. Set Preview and Thumbnail Show options
- C. 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

### D. 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

### E. 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



# Forms Management (Questionnaire) Skill Summary (20% of test)

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The forms management (questionnaire) portion of the test addresses competence in the following Dentrax skills:

- Understanding the Patient Questionnaires module
- Setting up the Patient Questionnaires module
- Setting up patient questionnaire forms
- Managing patient questionnaire responses
- Attaching questionnaire signatures
- Updating patient information
- Managing remote forms for an eCentral website or Kiosk
- Setting up Kiosk
- Completing forms using Kiosk

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

## A. Understanding the Patient Questionnaires module

1. Identify the purpose of the Patient Questionnaires module
2. Open the Patient Questionnaires module
  - a. Open Patient Questionnaires module with a patient selected
  - b. Open Patient Questionnaires module without a patient selected
  - c. Clear the selected patient, provider, or staff member
3. Use the Patient Questionnaires module 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 Patient Questionnaires module
  - a. Identify the Questionnaire List box
  - b. Identify the Questionnaire View Pane



## B. Setting up the Patient Questionnaires module

1. Select view settings
  - a. Show and Hide the Questionnaire View Pane
  - b. Select columns to display
  - c. Change column display order
  - d. Change column display size
2. Add, edit, and delete categories
3. Select Report Style option
4. Add, edit, and delete website address
  - a. Identify the location in Dentrix where the website address is used
5. Add, edit, and delete email address
  - a. Identify the location in Dentrix where the email address is used
6. Select electronic signature device
7. Verify Medical Alerts

## C. Setting up patient questionnaire forms

1. Identify the questionnaire forms that come installed with Dentrix
2. Identify the function and purpose of the New Question Response Types
  - a. Identify the purpose of the text Response Types
  - b. Identify the correct function of the Note Response type
  - c. Identify the correct function of the Short Text Response type
  - d. Identify the correct function of the Data Response type
  - e. Identify the correct function of the Yes or No Response type
  - f. Identify the correct function of the Number Response type
  - g. Identify the correct function of the Amount Response type
  - h. Identify the correct function of the One Choice from List type
  - i. Identify the correct function of the Checkbox List type
  - j. Identify the correct function of the Confirmation type
  - k. Identify the correction function of the Signature & Date type
3. Identify the function and purpose of the Insert Patient Info Response Types
  - a. Identify the purpose of the Patient Demographics response type
  - b. Identify the purpose of the Patient Name response type
  - c. Identify the purpose of the Patient Address response type
  - d. Identify the purpose of the Patient Phone response type
  - e. Identify the purpose of the Medical Alerts response type
  - f. Identify the purpose of the Referral Name response type
  - g. Identify the purpose of the Spouse/Responsible Party response type
  - h. Identify the purpose of the Employment Information response type
  - i. Identify the purpose of the Primary Dental Insurance Information response type
  - j. Identify the purpose of the Secondary Dental Insurance response type
  - k. Identify the purpose of the Primary Medical Insurance Information response type
  - l. Identify the purpose of the Secondary Medical Insurance Information response type
  - m. Identify the difference between the All types and the Brief types



4. Edit an existing form
    - a. Identify the best explanation of what happens to a form when it is edited if the form has been used
    - b. Identify the best explanation of what happens to a form when it is edited if the form has not been used
    - c. Given a scenario, correctly choose the appropriate option to edit a form that has not been used
    - d. Given a scenario, modify a form as specified
  5. Add a new form
    - a. Given a scenario, select whether to copy an existing form or create a new form independently
    - b. Given a scenario, create a form as specified
  6. Remove a form
    - a. Inactivate a form
    - b. Delete a form
  7. View/Print a form
    - a. Navigate the Print Preview window
    - b. Zoom in or out of a form in the Print Preview window
    - c. Print a form
- D. Managing patient questionnaire responses**
1. Select the List All view option
  2. Activate the View Mode
    - a. Use the Show Changes function
    - b. Use the Compare to Previous function
    - c. Identify responses that have been changed using the appropriate functions
  3. Enter new responses
    - a. Identify the correct reason that information may appear pre-filled on a new response
    - b. Activate the New Responses window
    - c. Enter response information
    - d. Navigate the New Responses window
    - e. Submit response information
  4. Edit existing responses
    - a. Identify the conditions that would prevent you from editing an existing response
    - b. Given a scenario, choose whether it is appropriate to edit an existing response or enter a new response and then perform the necessary operations
  5. Delete a response
  6. Move a response



**E. Attaching questionnaire signatures**

1. Identify the purpose of the signature option
2. Identify the conditions that would prevent you from being able to attach a signature to a form

**F. Updating patient information**

1. Identify the purpose of the different areas of the Update Patient Information dialog box
  - a. Identify the meaning of the information displayed in the Questionnaire Patient Info box
  - b. Identify the meaning of red versus blue text in the Questionnaire Patient Info box
  - c. Identify the purpose of the Information to use for Update box
  - d. Identify the purpose of the Family File Information box
  - e. Identify the meaning of the yellow highlight in the Information to Use for Update box
2. Update patient demographic information
3. Update spouse/responsible party
4. Update medical alerts
5. Update referral information
6. Update employment information
7. Update dental insurance information
8. Update medical insurance information

**G. Managing remote forms for an eCentral website or Kiosk**

1. Identify the eServices necessary to use questionnaires with a website or a kiosk
2. Set up WebSync to upload forms
3. Activate forms on eCentral website
  - a. Activate forms
  - b. Activate new patient forms
4. Set up patient access to eCentral website
  - a. Input web consent date
  - b. Setup login and passwords
5. Update patient information using received remote forms
  - a. View recent web responses

**H. Setting up Kiosk**

1. Access Kiosk Setup
2. Set Kiosk color scheme
3. Set Kiosk logo defaults
  - a. Enable or disable Logo option
  - b. Set image position
  - c. Select image file
  - d. Set image size



4. Add, enter, and delete Sign-in Text
  5. Add, enter, and delete Finish Text
  6. Set transition defaults
    - a. Enable or disable transitions
    - b. Select transition effect
- I. Completing forms using Kiosk**
1. Sign in patients
    - a. Sign in new patients
    - b. Sign in existing patients





# Referral Management Skill Summary (20% of test)

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

- Setting up referral defaults
- Setting up referral sources
- Assigning referral to a patient
- Maintaining referral sources
- Sending referral correspondence
- Generating reports about referral sources
- Setting up the eCentral Referral Manager
- Managing referrals with the Referral Manager

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 defaults

1. Add, edit, and delete referral specialties (Definitions)

## B. 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

## C. Assigning referral 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



### D. 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
4. Analyze referral sources
  - a. Identify the number of referrals that have been made from a referral source
  - b. Set a referral date span
  - c. Set a production date span
  - d. Identify the total gross production amount earned from a referral source in a date range
  - e. Identify the per patient gross production amount earned from a referral source in a date span
  - f. Identify the difference between the Total Referrals Made figure and the Listed Referrals figure
  - g. Identify the type and value of a gratuity assigned to a referral source
5. Assign gratuity information
  - a. Add and edit Gratuity Types
  - b. Assign a gratuity to a referral source
  - c. Edit and delete a gratuity
  - d. Add gratuity information to the Office Journal

### E. Sending referral correspondence

- a. Send an email to a referral source
- b. Print a quick label for a referral source
- c. Print a quick letter for a referral source
- d. Send a referral thank you letter to a source, including the Multiple Dr./Other Referrals, Multiple Patient Referrals, Non-Patient Referral, Patient Referral (Guar Only), and Patient Referral
- e. Send a Referred to Dr./Specialist letter

### F. Generating reports about referral sources

1. Generate the Referred To Doctor report
  - a. Identify the purpose of the Referred to Doctor report
  - b. Generate the Referred To report
  - c. Generate the Referred To report including referred patients
  - d. Generate Mailing Labels
  - e. Include patients without production
2. Generate the Referred By Doctor/Other report
  - a. Identify the purpose of the Referred By Doctor/Other report



- b. Generate the Referred By Doctor/Other report
      - c. Generate the Referred By Doctor/Other report including referred patients
      - d. Generate mailing labels
      - e. Include patients without production
      - f. Skip referral sources that are not people (ex. Yellow Pages)
    - 3. Generate the Referred by Patient report
      - a. Identify the purpose of the Referred by Patient report
      - b. Generate the Referred by Patient report
      - c. Generate Mailing Labels
      - d. Include patients without production
    - 4. Generate the Referral Recap report
      - a. Identify the purpose of the Referral Recap report
      - b. Identify the types of procedures that will print on the report
      - c. Generate the report by patient
      - d. Generate the report for a range of patients
    - 5. Generate a Referral Slip
      - a. Identify the purpose of the referral slip
      - b. Identify the types of procedures that will print on the slip
      - c. Generate the referral slip
    - 6. Generate the Practice Advisor New Patient Summary report
    - 7. Identify which reports provide referral information for the practice
  - G. Setting up the eCentral Referral Manager**
    - 1. Set up eCentral information in eSync
    - 2. Set up practice information in eCentral
    - 3. Set up referral email templates
      - a. Select referral template
      - b. Edit referral message
      - c. Make template active
      - d. Reset template
    - 4. Activate referral email notifications
    - 5. Set up referrals in eCentral Referral Manager
      - a. Search for a provider in the professional contact list
      - b. Add providers to personal contact list
    - 6. Set up referrals in DxWeb
      - a. Identify the difference in function between the primary and secondary email address
      - b. Add, edit, and delete an email address for a referred to provider
      - c. Add, edit, and delete a username for a referred to provider
      - d. Set Send E-mail Notification option
    - 7. Set up patients with a web consent date



## **H. Managing referrals with the Referral Manager**

1. Send referral via web from the Patient Chart
  - a. Select Patient Chart information to include with referral
  - b. Select insurance information to include with referral
  - c. Select progress notes to include with referral
  - d. Select treatment plan procedures to include
  - e. Add, edit, and delete a Referral Note
  - f. Set Include Referral Note in E-Mail Notification
2. View referrals received via the Referral Manager
3. Send referral emails to patients who have completed satisfaction surveys
4. View referrals received from patients



# Office Journal Skill Summary (10% of test)

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The Office Journal portion of the test addresses competence in the following Dentrix skills:

- Understanding the Office Journal window
- Setting up the Office Journal
- Accessing the Office Journal
- Viewing Office Journal entries
- Creating manual entries
- Using the Office Journal for daily reminders
- Printing the Office Journal

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

## **A. Understanding the Office Journal window**

1. Identify the different areas of the Office Journal, including contact tree, display panel, and toolbar
2. Identify the different contact types that are automatically added to the Office Journal, including scheduled appointments, purged appointments, broken appointments, archived patient information, billing statements, DXWeb communications, HIPAA Privacy requests, letters, payment agreement notes, perio letters, referral recaps, and referral slips
3. Identify the purpose of the four different manual Office Journal entry types, including phone calls, reminders, miscellaneous, and HIPAA Privacy

## **B. Identify the meaning of the different symbols in the Office Journal**

1. Setting up the Office Journal
  - a. Set up practice resources
  - b. Add, edit, and inactivate providers
  - c. Add, edit, and inactivate staff members
2. Set up Office Journal preferences
  - a. Select automatically launch Office Journal option
3. Customize the Office Journal display
  - a. Select Journal Entry types
  - b. Select Provider/Staff
  - c. Enter Entries Dated After date
  - d. Select Save as Default



### C. Accessing the Office Journal

1. Open the Office Journal to view patient/family information
2. Open the Office Journal to view provider/staff information
3. Open the Office Journal to view referral information

### D. Viewing Office Journal entries

1. Select View options
  - a. Switch between patient and family views
  - b. Expand and collapse the contact tree
  - c. Activate and deactivate the Show Information option

### E. Creating manual entries

1. Add a manual Office Journal entry
  - a. Given a scenario, select the appropriate type
  - b. Select Prov/Staff
  - c. Edit date and time if appropriate
  - d. Enter a description
  - e. Enter a note
2. Edit a manual Office Journal entry
3. Delete a manual Office Journal entry
  - a. Identify the conditions that would prevent you from deleting an Office Journal entry

### F. Using the Office Journal for daily reminders

1. Add a reminder for a patient
2. Add a reminder for a staff/provider

### G. Printing the Office Journal