



Practice Analysis & Security

Test Blueprint

- ✓ Practice Analysis
- ✓ Reporting
- ✓ Letter/Data Merge
- ✓ Data Setup, Maintenance, & Security



Overview

Who should take the Practice Analysis and Security test?

- Office managers or administrators.
- Team members who generate or analyze practice productivity or performance reports, such as the Daily Huddle or Practice Advisor reports.
- Staff who manage security settings or processes, such as passwords and audits.
- Anyone who wants to understand how practice analysis and security are set up and managed in Dentrix.

What's on the test?

The test for practice analysis and security addresses skills in four areas. They are listed here, with an approximate percentage of how much they are represented in the test.

- Reporting (30%)
- Practice Analysis (30%)
- Letter/Data Merge (15%)
- Data Setup, Maintenance, & Security (25%)

Number of questions: 50

Time limit: 70 minutes

Passing score: 80%

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 practice analysis test fit in Dentrix Mastery Tracks?

The practice analysis and security test makes up the practice analysis mastery track. Successfully completing the test brings you the recognition and benefits of being a Dentrix Practice Analysis Specialist.



Reporting (30% of test)

The Reporting portion of the skills assessment addresses proficiency in the following Dentrax skills:

- Accessing and using the Reports Reference guide
- Using the Batch Processor
- Generating common reports
- Sending reports to the Document Center

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

A. Accessing and using the Reports Reference guide

1. Access the Reports Reference online
2. Download the Reports Reference
3. Use the Reports Reference
 - a. Explain how to use the Reports Reference guide to identify when and why a report should be run

B. Using the Batch Processor

1. Understand the Batch Processor window
 - a. Interpret report status
2. Select workstation printer
 - a. Select a report printer
 - b. Select a label printer
3. Print reports
4. Preview reports
5. Delete reports
6. Refresh the Batch Processor

C. Generating common reports

1. Generate the Day Sheet report(s)
 - a. Explain the purpose and use of the Day Sheet
 - b. Generate the Chronological Day Sheet
 - c. Generate the Alphabetical Day Sheet
 - d. Generate the Receipts Only Day Sheet
 - e. Generate the Adjustment Only Day Sheet
 - f. Generate a Deposit Slip
 - g. Use the Day Sheet as a difficult procedure follow up call list



2. Generate Daily Appointment Reports
 - a. Generate batch patient route slips
 - b. Generate batch patient visit forms
 - c. Generate the Daily Huddle report
 - d. Generate the Appointment Book View report
3. Generate the Procedures Not Attached to Insurance Claims Report
 - a. Explain the purpose and use of the Procedure Not Attached to Insurance Claims Report
 - b. Generate the Procedures Not Attached To Insurance Claims Report
4. Generate the Insurance Claims to Process Report
 - a. Explain the purpose and use of the Insurance Claims to Process Report
 - b. Generate the Insurance Claims to Process Report
5. Generate the Aging Report
 - a. Explain the purpose and use of the Aging Report
 - b. Generate the Aging Report
6. Generate the Insurance Aging Report
 - a. Explain the purpose and use of the Insurance Aging Report
 - b. Generate the Insurance Aging Report
7. Generate the Continuing Care List
 - a. Explain the purpose and use of the Continuing Care List
 - b. Add, edit, and delete continuing care views
 - i. Work with continuing care view names
 - ii. Select continuing care types
 - iii. Select continuing care status
 - iv. Select continuing care scheduled appointment status
 - v. Work with the Continuing Care View sort order
 - vi. Work with continuing care due date
 - vii. Work with billing types
 - viii. Work with continuing care Prior Treatment Date Span
 - ix. Work with Last Visit Date Span
 - x. Work with providers
 - c. Generate the Continuing Care List
8. Generate billing statements
 - a. Explain the purpose and use of billing statements
 - b. Set Up billing statements
 - i. Select Practice Information to print on statements
 - ii. Add and edit dunning messages
 - iii. Add, edit, and delete Custom Billing Statement Notes
 - iv. Modify statement forms
 - v. Select a default billing statement
 - vi. Set Statement Count (Print Preferences)



- vii. Activate Provider ID column for statements
 - viii. Activate Verify Billing Statements to Sent
 - ix. Activate Copy Billing Statements to Document Center
 - c. Generate billing statements for printing
 - i. Set the Balance Forward Date
 - ii. Select guarantors
 - iii. Select providers
 - iv. Select billing types
 - v. Set the Minimum Balance to Bill
 - vi. Activate Include Credit Balances
 - vii. Explain the function and use of the different billing statement information options
 - Select Skip Accounts with Claim Pending option
 - Select Include Procs with Claim Pending
 - Select Print Dental Insurance Estimate
 - Select Print Agreed Payment
 - Select Print Due Date on Statements
 - Select Print Practice Information
 - Select Print Account Aging
 - Select Allow Credit Card Payment
 - Select If Not Billed Since
 - Select Only Bill Accounts Aging
 - viii. Select the Sort Transaction By option
 - ix. Select the Report Type
 - x. Add Billing Statement Notes
 - xi. Save Default settings
 - d. Verify Billing Statements
 - i. Navigate the Print window
 - ii. Remove a statement from the Print queue
 - iii. View and edit Guarantor Notes
 - iv. View and edit Account Billing Statement Notes
 - 9. Print Billing Statements
- D. Sending reports to the Document Center**
 - 1. Select the Document Center Print Driver
 - 2. Print documents to the Document Center
 - 3. View documents in the Document Center



Practice Analysis (30% of test)

The Practice Analysis portion of the skills assessment addresses proficiency in the following Dentrix skills:

- Setting up the Practice Analysis Report
- Adding, editing, copying, and deleting monthly production goals by provider
- Accessing and understanding Practice Analysis data
- Generating Practice Analysis Reports
- Setting up the Practice Advisor Report
- Generating the Practice Advisor Reports
- Generating other analysis reports

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

A. Setting up the Practice Analysis report

1. Select providers for the Practice Analysis report
2. Select column types
3. Set a column date range

B. Working with monthly production goals by provider

1. Add, edit, copy, and delete monthly production goals by provider

C. Accessing and understanding Practice Analysis data

1. Navigate the Practice Analysis screen
 - a. Open the Practice Analysis page
 - b. Change the Practice Analysis page
 - c. View the Goals vs. Production page
2. Interpret the Practice Analysis report
3. Copy the Practice Analysis data to the Windows Clipboard
4. Write the Practice Analysis data to a file

D. Generating Practice Analysis Reports

1. Explain the use and function of the seven Practice Analysis Reports
2. Print the Practice Analysis report
3. Generate the Production Summary report
4. Generate the Production Summary by Category
5. Generate the Production Summary by Procedure Code Range
6. Generate the Payment Summary
7. Generate the Adjustment Summary
8. Generate the Patient Summary



E. Setting up the Practice Advisor Report

1. Assign providers as Dentist/Hygienists
2. Assign adjustment types as production/collections
3. Assign payment types as production/collections
4. Add, edit, and restore default Production Benchmark ranges
5. Add, edit, and restore default Other Benchmark ranges
6. Set and restore default month spans

F. Generating the Practice Advisor Reports

1. Explain the use and function of the individual Practice Advisor Reports
 - a. Interpret the Production Practice Advisor Report
 - b. Interpret the Collections Practice Advisor Report
 - c. Interpret the New Patient Analysis Practice Advisor Report
 - d. Interpret the Continuing Care section of the Practice Advisor Report
 - e. Interpret the Schedule Management Practice Advisor Report
2. Add, edit, and delete report options
3. View and print the Practice Advisor Report

G. Generating the Daily Huddle report

1. Explain the use and function of the Daily Huddle report
2. Add, edit, and delete report options
3. Set up and restore Scheduled Patients defaults
4. View and print the report

H. Generating other analysis reports

1. Explain the use and function of other analysis reports
 - a. Interpret the Provider A/R Totals report
 - b. Interpret the Treatment Plan Statistics Analysis report
2. Generate the Provider A/R Totals report
 - a. Add, edit, and delete report options
 - b. View and print the Provider A/R Totals Report
3. Generate the Treatment Plan Statistics Analysis
 - a. Add, edit, and delete report options
 - b. View and print the Treatment Plan Statistics Analysis



Letter/Data Merge (15% of test)

The Letter/Data Merge portion of the skills assessment addresses proficiency in the following Dentrix skills.

- Using existing Letter Templates to create merged letters
- Creating and editing new letter templates
- Creating custom data exports
- Using Quick Letters

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

A. Using existing letter templates to create merged letters

1. Explain the purpose and function of the letter merge utility
2. Explain the use and function of the patient filters in the Patient Report View
3. Explain the use of the Data Fields in the Patient Report View
4. Access and use the dtxdocs list
5. Generate merged Letters
 - a. Generate birthday letters
 - i. Generate adult birthday letters
 - ii. Generate child birthday letters
 - b. Generate Continuing Care letters
 - i. Generate appointment reminder cards for patients with restorative appointments
 - ii. Generate appointment reminder cards for patients with hygiene appointments
 - iii. Generate continuing care due reminder cards for hygiene patients
 - iv. Generate a continuing care letter for adults
 - v. Generate a continuing care letter for children
 - vi. Generate a patient reminder letter for patients who are more than a year over due for a hygiene visit
 - c. Generate referral letters
 - i. Generate a letter to Dr./Other referral sources who have made multiple referrals
 - ii. Generate a letter to a patient who has made multiple referrals
 - iii. Generate a letter to a non-patient referral source
 - iv. Generate a letter to a patient who has made a single referral
 - v. Generate a letter to a Dr./Specialist to whom you've made a referral



- d. Generate collection letters
 - i. Generate a first notice collection letter
 - ii. Generate a second notice collection letter
 - iii. Generate a third notice collection letter
 - e. Generate inactive patient letters
 - i. Generate a reactivation letter for patients based on last visit date
 - ii. Generate a reactivation letter for patients based on last visit date and continuing care type
 - iii. Generate a reactivation letter for patients based on patient status.
 - f. Generate Welcome letters
 - i. Generate an Anniversary in Practice letter
 - ii. Generate a Welcome - After 1st Visit letter
 - iii. Generate a Welcome - Before 1st Visit letter
 - g. Generate Misc. letters
 - i. Generate an appointment super bill
 - ii. Generate a birth in family congratulations letter
 - iii. Generate a graduation congratulations letter
 - iv. Generate a marriage congratulations letter
 - v. Generate a patient information verification letter
 - vi. Generate a thank you letter for completing treatment plan work
 - vii. Generate a Treatment Plan reminder letter
- B. Creating and editing new letter templates**
1. Add an existing or new letter template to the Letters utility
 - a. Enter a letter name
 - b. Enter a Merge Date File Name
 - c. Enter a Merge Letter Template Name
 - d. Select patient filters
 - e. Select data filters
 2. Edit an existing letter template
 - a. Use Microsoft Word to edit an existing letter template
 - i. Insert graphics into a letter
 - ii. Edit font characteristics in a letter
 - iii. Edit text in a letter
 - iv. Insert and remove merge data fields in a letter
 3. Create a new letter template
 - a. Use Microsoft Word to create a new letter template
 - i. Insert graphics into a letter
 - ii. Edit font characteristics in a letter
 - iii. Add text to a letter
 - iv. Insert and remove merge data fields in a letter



C. Creating custom data exports

1. Generate the Patient Report by Filters list
2. Use the View Data File option

D. Using Quick Letters

1. Generate a Quick Letter
2. Add and remove letters from Quick Letters





Data Setup, Maintenance, & Security (25% of test)

The Data Setup, Maintenance, & Security portion of the skills assessment addresses proficiency in the following Dentrix skills.

- Setting up practice resources
- Setting up Procedure codes
- Adding, editing, disabling, and deleting multi-codes
- Maintaining Fee Schedules using the Automatic Fee Schedule Changes utility
- Running the Purge Exported Files utility
- Backing up data
- Setting up and managing passwords
- Using audit tools
- Using the Time Clock

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

A. Setting up practice resources

1. Add, edit, and inactivate providers

B. Setting up Procedure codes

1. Add and edit procedure codes
 - a. Enter a Description
 - b. Enter Code Names
 - c. Set Treatment Flags
 - i. Explain the function of the Difficult Proc flag
 - ii. Explain the function of the Condition flag
 - iii. Explain the function of the Remove Tooth flag
 - iv. Explain the function of the Show in Chart flag
 - d. Set Auto Continuing Care
 - e. Set chair, assistant, and provider time for a procedure
 - f. Select a Procedure Category
 - g. Select an Appointment Type
 - h. Select a Treatment Area
 - i. Select a Paint Type
 - j. Set up Procedure Code Notes
 - i. Add, edit, and delete a Procedure Code Progress Note



- ii. Select copy note option for Procedure Code Progress Notes
 - iii. Add, edit, and delete a Recommendation Note
 - iv. Attach a Recommendation Document to a procedure code
 - v. Select to print a recommendation note on a Walkout statement
 - k. Edit fees
 - l. Enter Lab and Material Expenses
 - m. Flag a code for Medical Cross Coding
 - n. Select Do Not Bill to Dental Insurance
 - o. Save a procedure code
 - p. Navigate between codes using the arrow buttons.
- C. Adding, editing, disabling, and deleting multi-codes**
 - 1. Enter a Description
 - 2. Enter a multi-code
 - 3. Enter an Abbreviated Description
 - 4. Select an Appointment Type
 - 5. Set chair, assistant, and provider time for a multi-code
 - 6. Set the multi-code type
 - 7. Add, edit, and delete procedure codes from a multi-code
 - a. Select treatment areas
 - 8. Add, edit, and delete diagnostic codes from a multi-code
- D. Maintaining Fee Schedules using the Automatic Fee Schedule Changes utility**
 - 1. Copy and clear fee schedules
 - 2. Change fee schedules
 - a. Increase and decrease by a percentage
 - b. Increase and decrease by a dollar amount
 - c. Set a minimum amount to increase
 - d. Select a rounding option
- E. Running the Purge Exported Files utility**
 - 1. Explain the purpose and function of the Purge Exported Files utility
 - 2. Purge data, exported text, and log files
- F. Backing up data**
 - 1. Explain the daily, weekly, monthly, and quarterly backup recommendations
- G. Setting up and managing passwords**
 - 1. Explain the use and function of passwords
 - 2. Set up passwords
 - a. Enable passwords
 - b. Require secure user passwords
 - c. Set Verify User Before Access options
 - d. Set up a password administrator account
 - i. Set administrator password
 - ii. Assign administrator security rights



- e. Set up user accounts
 - i. Set user password
 - ii. Assign user rights
 - iii. Copy user rights
- 3. Change passwords
- 4. Use passwords
 - a. Log into Dentrix
 - b. Override the current user
- H. Using audit tools**
 - 1. Generate the Audit Trail Report
 - 2. Generate the Appointment History List
 - 3. View appointment history
- I. Using the Time Clock**
 - 1. Set up the Time Clock
 - 2. Set up the Employee Clock In/Out
 - 3. View a log of an employee's time clock punches