Treatment Planning Test Blueprint

- ✔ Treatment Planning
- ✔ Appointment Scheduling
- ✔ Office Journal

Overview

Who should earn this Treatment Planning certificate?
- Front office and clinical staff who manage treatment planning
- Anyone who wants to understand how treatment planning is set up and managed in Dentrix

What's on the test?
The test for treatment planning addresses skills in three areas. They are listed here, with an approximate percentage of how much they are represented in the certificate test:

- Treatment Planning & Case Presentation (60%)
- Appointment Scheduling (30%)
- Office Journal (10%)

Number of questions: 40
Time limit: 60 minutes
Passing score: 80%

How can I prepare for the test?
The skills and tasks related to the Treatment Planning competency certificate 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 treatment planning test and the charting test make up the clinical mastery track. Successfully completing the two tests brings you the recognition and benefits of being a Dentrix Clinical Specialist.

Treatment Planning & Case Presentation Skill Summary (60% of test)

The treatment planning & case presentation portion of the test addresses competence in the following Dentrix skills:

- Treatment Planner setup
- Entering Treatment Plan cases
- Managing Treatment Plan cases
- Setting up consent forms
- Printing treatment case reports
- Producing case presentations
- Using the Presenter
- Generating reports about treatment plans

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

A. **Treatment Planner setup**
   1. Set up Treatment Planner View options
      a. Set Totals views
      b. Set Procedure Information view
      c. Set Patient Friendly Description view
      d. Set Fee view
      e. Set Treatment Planner view
      f. Set Toolbar view
   2. Add, modify, and delete Case Note templates
   3. Set up Case Presentation defaults
      a. Add, edit, and delete Case Presentation outlines
      b. Set up, enable and disable the welcome page
   4. Add, rename, and delete case financing statuses
   5. Modify patient-friendly descriptions
   6. Customize treatment case defaults
      a. Set estimate expiration
      b. Set default Case Note template
      c. Set default Case Presentation outline
      d. Set automatic Case Status updates

7. Set up consent forms
    a. Add, edit and delete consent forms
    b. Select an electronic signature device
8. Set up patient education topics
    a. Add, edit, and delete patient education topics
        i.   Add, rename, and delete categories
        ii. Select a topic category
        iii. Select media content
        iv. Select images for printed content
        v.   Select text files for printed content
        vi. Add and remove associated procedure codes
9. Update treatment plan fees globally

B. **Entering treatment recommendations**
    1. Enter treatment plan procedures from the Ledger
    2. Enter treatment plan procedures from the Patient Chart

C. **Managing treatment plan cases**
    1. Display completed and rejected cases
    2. Create, rename, and delete a treatment plan case
    3. Identify what happens when a treatment plan case is deleted
    4. Create and edit alternate cases
    5. Link and unlink cases
    6. Update case status
        a. Set case status
        b. Accept a case
        c. Reject a case
        d. Refer a case to another provider
        e. Complete a case
    7. Set case severity
    8. Order procedures by visit
    9. Manage procedures in cases
        a. Move procedures between cases
        b. Delete procedures from a case
        c. Set a procedure complete
    10. Set the default treatment plan case

11. Enter supporting information for cases
    a. Set Case Financing status
    b. Set an estimate expiration date
    c. Insert a Case Note template
    d. Add, edit and delete a case note
12. View case status history
13. View case insurance information
    a. View primary insurance notes
    b. View secondary insurance notes
    c. View the insurance benefits summary
14. Update treatment plan fees for current patient

D. Managing consent forms
    1. Attach a consent form to a case
    2. Sign a consent form
        a. Add an additional note
        b. Enter patient signature information
        c. Select practice signature information
        d. Save a signature
        e. Print a signed consent form
        f. Remove a consent form from a case

E. Printing Treatment Case reports
    1. Print the Treatment Case report
        a. Create, rename, and delete report options
    2. Print the Patient Treatment Case report
    3. Print the Practice Treatment Case report

F. Producing case presentations
    1. Select, modify, and clear a case presentation outline
    2. Add, arrange, and delete case presentation content
        a. Include the patient chart
        b. Include case detail
        c. Include insurance benefit information
        d. Include patient education topics
        e. Include content from Dentrix image
   f. Include consent forms
    3. Burn a case presentation CD

G. Using the presenter
1. Use the Presenter notation tools
    a. Select and use a pen tip
    b. Select and use a notation color
    c. Select and use the eraser tool
    d. Enter and place text
    e. Use the undo and redo commands
2. Use Snapshots
    a. Take a snapshot
    b. Display a snapshot
    c. Add a snapshot to a case presentation
    d. Delete a snapshot
    e. Copy a snapshot to the clipboard
    f. Export snapshots
    g. Print snapshots
3. View and play patient education media

H. Generating reports about treatment plans
1. View case acceptance totals in the Practice Advisor
2. View case acceptance totals in the Daily Huddle
3. Generate the Treatment Plan Statistics Analysis
4. Generate the Unscheduled Treatment Plans Report
5. Generate the Treatment Manager List
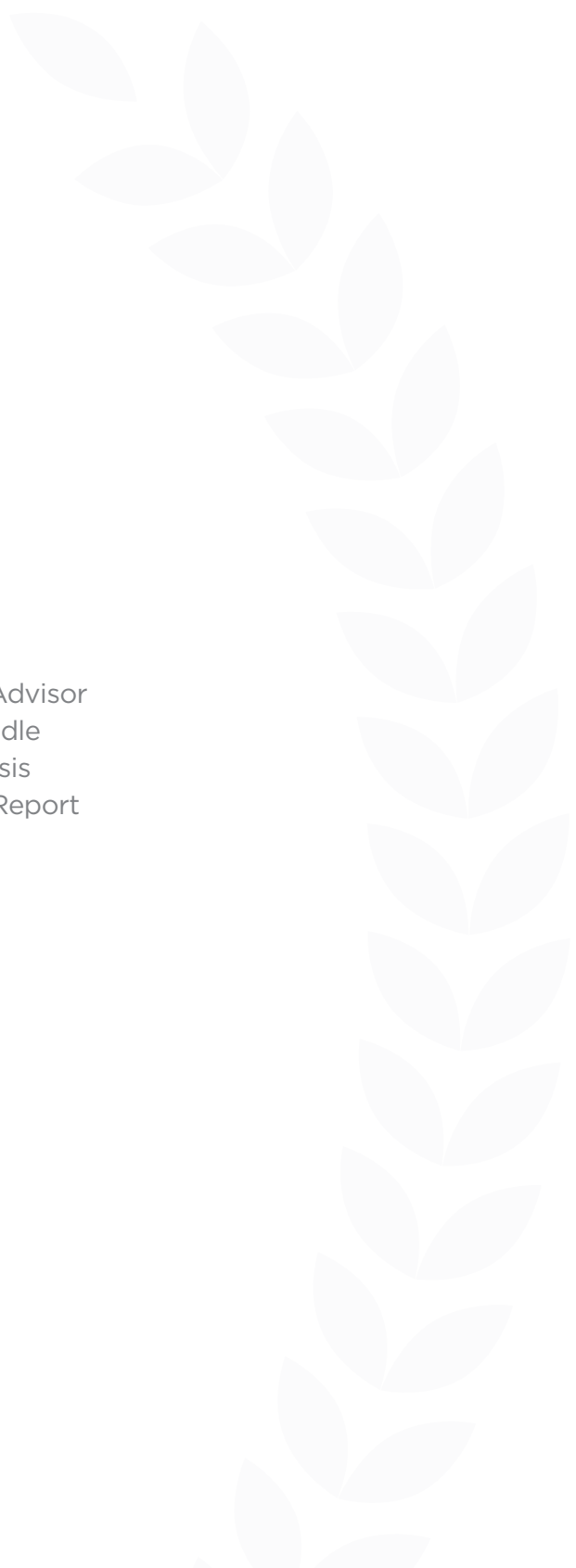
Appointment Scheduling Skill Summary (30% of test)

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

- Understanding the Appointment Book window
- Navigating the Appointment Book claims
- Using Appointment Book views
- Modifying default Appointment Book hours
- Finding available appointment times
- Locating existing appointments
- Scheduling appointments
- Scheduling events
- Rescheduling appointments
- Deleting appointments
- Setting appointments complete
- Using the Appointment Book day note
- Accessing and modifying patient information
- Generating appointment reports
- Viewing appointments while away from the office

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 Appointment Book window**
   1. Identify the different areas and information indicated in the Appointment Book window, including the view date, operatory columns, navigation buttons, the Pinboard, the Flip Tab area, current time indicator, open and closed time indicators, provider time columns, and provider time blocks
   2. Identify appointment symbols, including the new patient symbol, appointment note symbol, medical alert symbol, insurance eligibility symbol, lab case symbol, and patient alert symbol
   3. Identify and read appointment information
   4. Identify and read event information

B. Navigating the Appointment Book
1. Use the navigation buttons to move forwards and backwards
2. Use the day, week and month views
3. Use the calendar button to jump to a day
4. Use flip tabs to jump to a day

C. Using Appointment Book views
1. Add, edit and delete views
2. Switch between views
3. Demonstrate awareness that Views are workstation specific

D. Modifying default Appointment Book hours
1. Modify default practice hours
   a. Edit and reset the practice hours for a specific day
   b. Close and open the practice on a specific day
   c. Set and delete a practice yearly holiday
2. Modify default provider hours
   a. Edit and reset a provider's hours for a specific day
   b. Set and delete a provider vacation day
3. Edit and reset operatory hours for a specific day

E. Finding available appointment times
1. Use navigation controls to manually find an available appointment time
2. Use the Find New Appointment Time tool

F. Locating existing appointments
1. Identify a variety of ways to locate existing appointments
   a. Use the Locate Existing Appointments button
   b. Use the Other Appointments command to open the Family Appointment List
   c. Use the More Info button/command

G. Scheduling Appointments
1. Identify the differences in scheduling initial, treatment planned, and continuing care appointments for existing patients
2. Select an operatory, date, and time
   a. Double-click on an available operatory, date, and time
   b. Right-click on an available operatory, date, and time
   c. Use the Find New Appointment Time tool
   d. Use the Pinboard to drag and drop an appointment to a desired time
   e. Manually enter an operatory, date, and time

3. Select a patient
    a. Double-click on the appointment book
    b. Right-click on the appointment book
    c. Use the File menu Select Patient command
    d. Use the File menu Current Patient command
    e. Use the Schedule Appointment button
4. Add and modify appointment information
    a. Select a provider
    b. Attach and detach continuing care
    c. Add and delete an appointment reason
        i.   Given a scenario, apply your knowledge of the use of the Initial, Tx, and Misc buttons to correctly select an appointment reason.
    d. Modify the appointment description
    e. Modify an appointment length
        i.   Modify time length
        ii. Modify chair time, assistant time, and provider time
    f. Modify an appointment amount
    g. Select a staff member
    h. Select an appointment status
    i. Select a schedule type
    j. Select an appointment type
    k. Add, edit, and delete an appointment note
    l. Use the appointment checklist
    m. Indicate a lab case is connected to the appointment
5. Schedule initial appointments for new patients
    a. Use the New Patient button
    b. Identify the difference in use and function between a new patient appointment and an existing patient appointment
6. Use the Schd. Next button to schedule a series of appointments
    a. Identify the function of the Schd. Next button

H. **Scheduling events**
    1. Select an operatory, date, and time
        a. Right-click on a desired operatory, date, and time
        b. Enter operatory, date, and time manually
        c. Use the Pinboard to drag and drop an event to a desired operatory, date, and time

2. Add and modify event information
   a. Compare and contrast the use of the Schedule Event option to close an operatory and/or to schedule a provider's time
   b. Select the Event Time
   c. Select the Event Day(s)
   d. Select operatories
   e. Select display options
      i. Center description
      ii. Select color
   f. Add, edit, and delete an event note

I. Rescheduling appointments
   1. Drag and drop an appointment
   2. Move appointments using the Pinboard
      a. Reschedule a single appointment for a date
      b. Reschedule all family appointments for a date
      c. Reschedule all provider appointments for a date
      d. Reschedule all operatory appointments for a date
      e. Reschedule all appointments for a date
      f. Use the Dentrix Pinboard List
         i. Open the List
         ii. Set View options
         iii. Schedule an appointment from the list
         iv. Delete an appointment or event from the pinboard
         v. Copy the list to the Windows clipboard
         vi. Use the Auto Dial command
         vii. Refresh the list
         viii. Access appointment information by double-clicking on an appointment
   3. Edit the operatory, date, and time for an existing appointment
   4. Move an appointment to the Unscheduled List
      a. Use the break appointment button
      b. Use the wait/will call button
      c. Identify the difference in purpose and consequence between using the break appointment and wait/will call buttons

J. Deleting appointments
   1. Delete an individual appointment
      a. Identify the difference between using the delete button and moving an appointment to the Unscheduled List in dealing with broken appointments

      b. Identify circumstances where it would be appropriate to delete an appointment

  2. Purge appointments

K. Setting appointments complete

  1. Complete an appointment

  2. Restore an appointment that is accidentally set complete

L. Using the Appointment Book Day note

  1. Add, edit, and delete an Appointment Book Day note

M. Accessing and modifying patient information

  1. Access patient information using the More Info button

    a. Switch to another family member in the More Information dialog box

    b. View a selected appointment in the Appointment Book

    c. Open the Continuing Care module

    d. Switch to the Ledger

    e. Create an addressed email

    f. Dial a phone number

    g. Open the Office Journal

  2. Switch to the Family File using the Patient Info button

  3. View the Family Appointment list using the Other Appt(s) button

    a. View a selected appointment in the Appointment Book

    b. Create a new appointment from the Family Appointment list

    c. View information for another family member in the Family Appointment list

  4. View and modify insurance claim information using the Ins Claim Info button

  5. View and modify lab case information using the Patient Lab Cases button

N. Generating appointment reports

  1. Generate the Appointment Book View report

    a. Create, modify, and delete report options

  2. Generate patient route slips

    a. Generate from the Appointment Book

    b. Generate in batch from the Office Manager

  3. Generate patient visit forms

4. Generate the Daily Appointment List
   a. Use the interactive Appointment List
      i. Access the list
      ii. Set the list date
      iii. Set view options
      iv. Reschedule appointments
      v. Copy the list to the Windows clipboard
      vi. Set appointment status for an appointment
      vii. Check insurance eligibility for a patient
      viii. Open the Office Journal
   b. Generate the Daily Appointment List from the Office Manager
      i. Generate the Daily Appointment List
      ii. Generate an Operatory Appointment List
      iii. Generate a Family Appointment List

O. **Viewing appointments while away from the office**
   1. View appointments with Dentrix Mobile
      a. Access Dentrix Mobile
      b. View provider appointment lists
      c. View appointment details
   2. View appointments with the eCentral Appointment Manager
      a. Access the Appointment Manager
      b. View appointment list for current day
      c. View appointment list for selected day
      d. View appointments by provider
      e. Show or hide appointment details
      f. Confirm appointments from the Appointment Manager list
      g. Verify insurance eligibility from the Appointment Manager list

Office Journal Skill Summary
(10% of test)

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 assessment, 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
   4. Identify the meaning of the different symbols in the Office Journal

B. **Setting up the Office Journal**
   1. Set up practice resources
      a. Add, edit, and inactivate providers
      b. 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**
   a. Add a reminder for a patient
   b. Add a reminder for a staff/provider

G. **Printing the Office Journal**