

Presenter Introduction

Katie Nielsen

- Certified Dentrix trainer for 20 years. Dentrix Ascend trainer for 7 years.
- Awarded Dentrix Ascend Trainer of the Year (2016) and Dentrix Ascend Spirit award (2018).
- An expert in helping offices create a predictable and profitable workflow.





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Tip

Conduct Time Studies

- Document exactly how much time a team member needs to perform a specific dental procedure.
- Eliminate scheduling guesswork by making datadriven decisions.
- Things change! Re-evaluate on at least an annual basis.

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Introducing Schedule Templates

- Color code
- Configured operatory
- Displays u appointme

olor coded	Calendar	Today 🖌 🕨 January	2022 - 1w M 1m M 6m M	Pinboard View Actions Print
onfigured by	Q		Monday 3 View Gross I View Net	Production Totals
beratory	💷 1-Тх	2-Tx	3-Hygiene	4-Hygiene
splays underneath ppointments	8 AM Emergencies	Emergencies	Candice Bentley 8:00 AM Prophy Stee production	Mark Bentley 8AM 8:00 AM 10 Prophy 20 30 30
	50 Emergencies 9-M Isaac Chilfopin 9-00 AM 20 C/mPoCm, CmPoCm 40 40 10-04 10 20 20 20 20 20 20 20 20 20 2	Emergencies Emergencies High Production	Paige Bentley B:50 AM Prophy Interspectation Prophy Prophy	
	40 50 High Productio	on High Production	019.	40
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Ask Yourself Before you start building your Schedule Template, you need to create a plan.	
1. What are your "big rocks" or high production procedures?	
2. What dollar amount represents high production for your practice?	
3. How many high production procedures do you need to book daily to meet your goals?	
4. Do you need to prioritize New Patient appointments?	
5. How far booked out is your hygiene schedule for SRPs?	
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Creating A Plan What types of appointments do you want to block off time for? Operatory Treatment Hygiene Туре • Emergencies • Prophy/Perio Morning ٠ High production SRP ٠ New patients • ٠ Emergencies • Low production (Crown seats, fillings, Prophy/Perio Afternoon • emergencies) • New patients **DENTRIX**ASCEND HENRY SCHEIN NE

Locating Schedule Templates From the Settings menu, 🗳 Settings 🗸 • Cttn1-Cottonwood Dental -.... 🗊 Kayla 🦂 select Schedule Template. LOCATION PRODUCTION PATIENT CARE **Clinical Note Templates** Location Hours **Coverage Tables** Location Information Fee Schedules Medical Alerts Library Patient Forms Insurance Defaults Patient Communications • Requires the Manage Location Operatories Procedure Codes & Conditions Prescriptions Information right (Look under User Accounts Ledger Options Recare the Settings section of the User User Roles **Discount Options Referral Sources** Rights List). • The Schedule Template is Credit Card Options Appointment Colors location-specific. **DENTRIX**ASCEND HENRY SCHEIN

Adding a Schedule Template 1. Select an 🕈 Home 🔻 🖬 Schedule 👻 💄 Patient 👻 🖷 4 📌 Settings 🚽 🗭 Kayla Operatory. Schedule Template Online Booking On Only show first available slot Off 0 Book on your website Filter by Provider Monday Tuesday Thursday Friday Wednesday All • Set up the time Operatory blocks for the entire week for each 2-Tx 9AM operatory. 3-Hygien 4-Hygien • Warning: This view 10AM is different from the Day view in the Schedule. **DENTRIX**ASCEND HENRY SCHEIN



	Time Slot - Monday 8:00 AM 9:00 AM	×
	Title	Color *
Configure the Time Slot	1	×
dialog box.	Day Of Week *	What type of appointments can be booked online?*
	Monday 🗸	Recare
	Available *	✓ New Patients ①
	MA 00:9 MA 00:8	 Existing Patients
The day and date populate	Providers that can be booked * A	None (do not allow online booking)
based on your selection.		What appointment reasons can nationte choose from? *
		Broken or chimped tooth
		Discomfort/Pain
		New Patient
		Other
		Problem with crown or bridge
		Routine exam/cleaning
		Whitening Consultation
	Save	



	Schedule Template Online Booking On Only show first available slot
Ŧ	Filter by Provider Monday Tuesday
	All
Once you have a time	Operatory 30 DDS1, DDS2
block configured, copy it	1-Tx M 40 50 Emergencies
to other days.	2-Tx 9AM
 Click the Copy time slot button. 	Schedule Template Online Booking On Only show first available slot
2. Click the time when	Filter by Provider Monday Tuesday
you want the copied	All RAM Emergencies Emergencies B:00 AM - 9:00 AM -
this <u>or another</u>	Operatory 20 Existing & New Patient Existing & New Patient DDS1, DDS2 DDS1, DDS2
operatory.	1-Tx M 40 50 Emergencies Emergencies
	2-Tx 9AM
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Review	ing the Plan	
Operatory Type	Treatment	Hygiene
Morning	 Emergencies High production New patients 	Prophy/PerioSRP
Afternoon	 Emergencies Low production (Crown seats, fillings, emergencies) New patients 	• Prophy/Perio
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3.	Use the Copy Time Slot button to	Schedule Template Filter by Provider All Operatory	0nli 20 30 40	ne Booking On Monday	Only show first available Tuesday	slot off 0	Online Utilization Thursday	Book on your website Friday
	slot.	1-Tx M T W Th F 2-Tx 3-Hygiene 4-Hygiene	8AM 10 20 30 40 50 9AM 10 20 30 40 50 9AM 10 20 30 40 50 9AM 10 20 30 40 50 9AM 10 20 30 40 50 9AM 10 20 30 40 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 50 9AM 10 20 20 50 9AM 10 20 20 50 9AM 10 20 20 20 20 20 20 20 20 20 2	Emergencies & 8:00 AM - 9:00 AM Existing 8 New Patient D051, D052 Emergencies High Production & 9:00 AM - 11:00 AM D051, D052	Emergencies © 8:00 AM - 9:00 AM New & Existing Patient DDS1, DDS2 Emergencies High Production © 9:00 AM -11:00 AM DDS1, DDS2	Emergencies © 8:00 AM - 9:00 AM New & Existing Patient DDS1, DDS2 Emergencies High Production © 9:00 AM -11:00 AM DDS1, DDS2	Emergencies © 8:00 AM - 9:00 AM Existing 8: New Patient DDS1, DDS2 Emergencies High Production © 9:00 AM -11:00 AM DDS1, DDS2	Emergencies © 8:00 AM - 9:00 AM Existing 8:New Patient DDS1, DDS2 Emergencies High Reduction 9:00 AM 24 100 AM DDS1, DDS2
		DENTRIXA	50 11AM 10 20 30 40 50	High Production	High Production	High Production	High Production	High Production





	Filter by Provider		Monday	Tuesday	Wednesday	Thursday	Friday
	All	8AM	Emergencies ©	Emergencies 🔊	Emergencies	Emergencies 🔊	Surgeries
specific to an	Operatory	10 20 30	Existing & New Patient: DDS1, DDS2	Existing & New Patient: DDS1, DDS2	Existing & New Patient: DDS1, DDS2	Existing & New Patient: DDS1, DDS2	DDS2
operatory.	1-Tx MTW	Th F 40	Emergencies	Emergencies	Emergencies	Emergencies	
1 /	2-TX M T W	Th F 9AM	High Production 6 9:00 AM - 11:00 AM	High Production 9:00 AM - 11:00 AM	High Production C 9:00 AM - 11:00 AM	High Production 0 9:00 AM - 11:00 AM	
	3-Hygiene	20	DDS1, DDS2	DDS1, DDS2	DDS1, DDS2	DDS1, DDS2	
	4-Hygiene	30					
		50					
		10				_	
		30 40 50	High Production	High Production	High Production	High Production	
		11AM 10	New Patients O 11:00 AM - 12:00 PM	New Patients @ 11:00 AM - 12:00 PM	New Patients @ 11:00 AM - 12:00 PM	New Patients O 11:00 AM - 12:00 PM	
		30	DDS1, DDS2	DDS1, DDS2	DDS1, DDS2	DDS1, DDS2	
		40	New Patients	New Patients	New Patients	New Patients	Surgeries
		12PM					1111111111

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eview Operatory	ing the Plan	Unione
Туре		Hygiene
Morning	Emergencies High production New patients	Prophy/PerioSRP
Afternoon	 Emergencies Low production (Crown seats, fillings, emergencies) New patients 	• Prophy/Perio



Making the Time Blocks Visible



















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Table view	Production Totals: Sun, Jan 2, 2022 - Sat, Jan 8, 2022		×
	Week Month		
• Filter for all providers or specific	Showing for All providers Today I w Jan 2022 Sun, 2 - Sat, 8		Change to Graphic View
providers.	Days of the Week → Providers	Scheduled Net 🕧	Actual Net 🕦
	▶ Sun, Jan 2, 2022	0.00	0.00
 Expand a day to see production by provider. 	> Mon, Jan 3, 2022	3,203.20	1,090.20
	▶ Tue, Jan 4, 2022	3,341.40	2,380.60
	▼ Wed, Jan 5, 2022	2,782.00	3,425.00
	Kareem Redmond - 123456	0.00	0.00
 Includes all 	Ben Nielsen - Ben	174.00	0.00
nrocedures	Dan Jones - DANJ	155.00	0.00
schodulod or	Dan Wells - DANW	681.00	0.00
scheduled of	Adam McDermott - DDS1	1,032.00	3,392.00
completed for today.	Katie Nielsen - HYG2	740.00	33.00
• Actual values undate	Totals	16,941.40	6,895.80
as appointments	Done Refresh Values		



Gross • Procedu include	S VS Ne ures must be d in calculat	t Production e scheduled or completed to be ions.			
	Gross	Sum of procedure charges* without any discounts or adjustments deducted			
	Net	<i>Estimated</i> sum of production values with anticipated insurance write-offs and applied credit adjustments			
*The Procedure Charge is the UCR for procedures not completed, or the charged amount for a posted procedure (with a Complete status) on a patient's ledger.					
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