

DENTRIX ENTERPRISE

The Cures Act & Information Blocking

Last Updated on October 6, 2022

Introduction

Dentrix Enterprise supports the sharing of electronic health information (EHI) and provides “reasonable and necessary activities that do not constitute information blocking” in compliance with the Cures Act.

Note: For more information about information blocking, visit the official website of the Office of the National Coordinator for Health Information Technology (ONC) at <https://www.healthit.gov/topic/information-blocking>.

This document describes how to obtain the following types of EHI for a patient in Dentrix Enterprise and send the files to the patient or another provider. Refer to the following topics:

- Financial Transactions and Insurance Claims 3
- Conditions and Treatment 5
- Clinical Notes 8
- Periodontal Exams 10
- Sending Files with Patient Portal..... 14
- Sending Files by Email..... 18

Important: Follow your practice’s guidelines for securely storing, saving, and exporting patient information.

Financial Transactions and Insurance Claims

You can export financial transactions and insurance claim from a patient's Ledger record to other programs, such as Microsoft Word® and Microsoft Excel®.

To export a patient's Ledger record

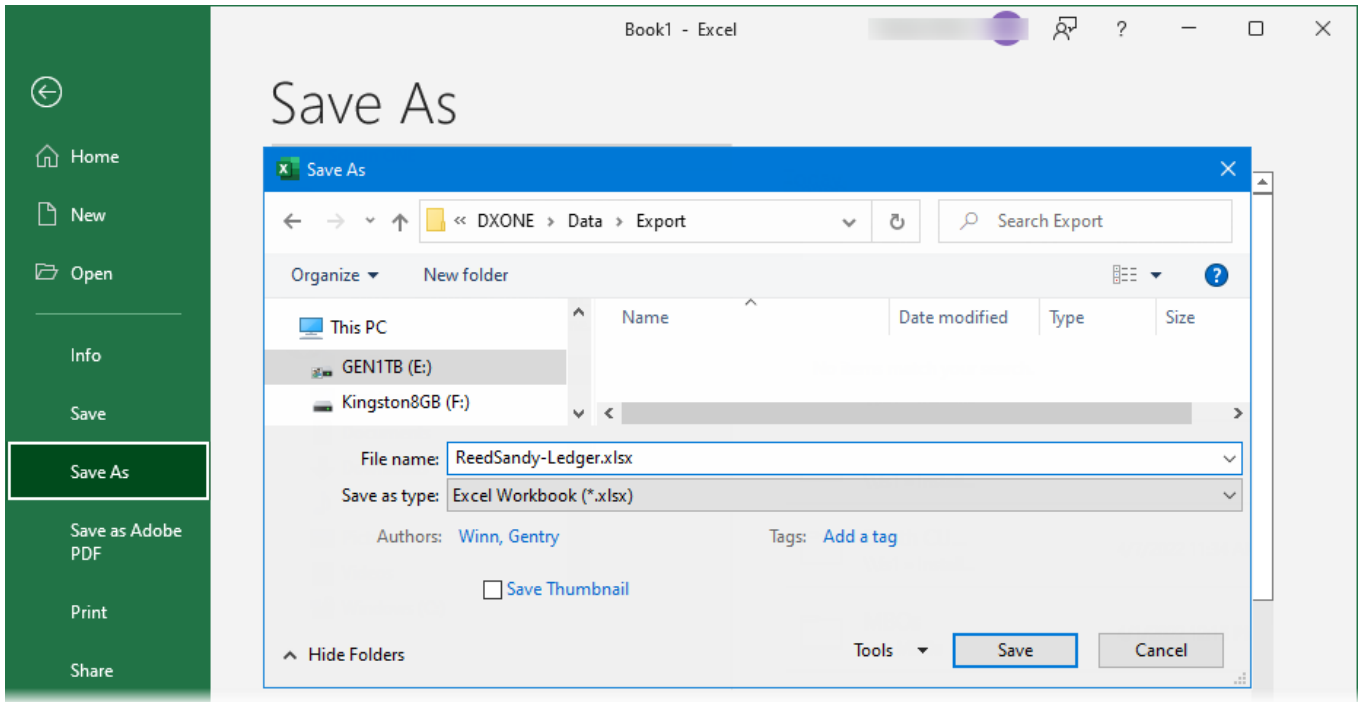
1. In Ledger, customize the transaction log to display the required information.

Date	Name	Surface	Tooth	Check #	Code	Description	N	R	D	M	S/P	Amount	Provider	Clinic	Ins	AP	Balance
09/02/2020	Sandy Reed				D8690	Ortho treatment (bill/contract)						6100.00	DSMITH	AF	X2		6100.00
09/02/2020	<Family>				Payment	Online Payment						-100.00	DSMITH	AF			6000.00
09/02/2020	<Family>				Payment	Online Payment						-5000.00	DSMITH	AF			1000.00
09/02/2020	<Family>				Payment	Online Payment						-1000.00	DSMITH	AF			0.00
11/30/2020	Sandy Reed		1		D7140	Extract,erupted th/exposed rt						825.92	DSMITH	AF			825.92
11/30/2020	Sandy Reed		16		D7140	Extract,erupted th/exposed rt						825.92	DSMITH	AF			1651.84
11/30/2020	Sandy Reed			123	Dent Ins.	Prim Dent Ins. Payment						-1321.46	DSMITH	AF			330.38
11/30/2020	Sandy Reed				Dent Ins.	Sec Dent Ins. Payment						-100.00	DSMITH	AF			230.38
11/30/2020	Sandy Reed				Ins	Prim Dental Claim - Rec'd 1651...								AF			230.38
11/30/2020	Sandy Reed				Ins	Sec Dental Claim - Rec'd 1651.84								AF			230.38
06/01/2021	Sandy Reed				D1110	Prophylaxis-adult						148.32	MHAYES	AF	No		378.70

2. On the **File** menu, click **Copy to Clipboard**.
3. In Excel, click **Paste** to insert the information into a new workbook.

	A	B	C	D	E	F	G	H	I	J	K
1	Dentrix Ledger - (Reed, Sandy) [AF] [UTC -06:00 [MDT]] [DSMITH] [] - Wed - Sep 28, 2022										
2	Date	Name	Surface	Tooth	Check #	Code	Description	Amount	Provider	Clinic	Balance
3	9/2/2020	Sandy Reed				D8690	Ortho treatment (bill/contract)	6100	DSMITH	AF	6100
4	9/2/2020	<Family>				Payment	Online Payment	-100	DSMITH	AF	6000
5	9/2/2020	<Family>				Payment	Online Payment	-5000	DSMITH	AF	1000
6	9/2/2020	<Family>				Payment	Online Payment	-1000	DSMITH	AF	0
7	11/30/2020	Sandy Reed		1		D7140	Extract,erupted th/exposed rt	825.92	DSMITH	AF	825.92
8	11/30/2020	Sandy Reed		16		D7140	Extract,erupted th/exposed rt	825.92	DSMITH	AF	1651.84
9	11/30/2020	Sandy Reed			123	Dent Ins.	Prim Dent Ins. Payment	-1321.46	DSMITH	AF	330.38
10	11/30/2020	Sandy Reed				Dent Ins.	Sec Dent Ins. Payment	-100	DSMITH	AF	230.38
11	11/30/2020	Sandy Reed				Ins	Prim Dental Claim - Rec'd 1651.84			AF	230.38
12	11/30/2020	Sandy Reed				Ins	Sec Dental Claim - Rec'd 1651.84			AF	230.38
13	6/1/2021	Sandy Reed				D1110	Prophylaxis-adult	148.32	MHAYES	AF	378.7

4. Hide or delete unnecessary columns as needed.
5. Click **File**, and then click **Save As** to save the workbook.



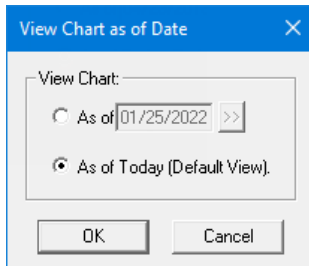
6. Select where to save the file, enter a name for the file, and then click **Save**.

Conditions and Treatment

You can export the progress notes and graphical chart that are in a patient's Chart record.

To export a patient's Chart record

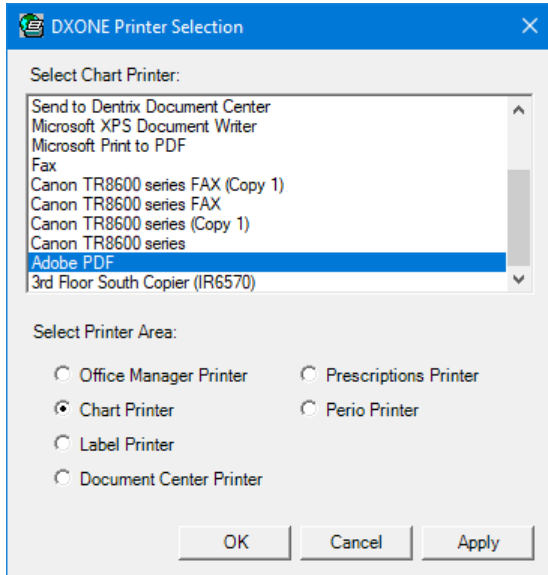
1. In Chart, on the **View** menu, click **Set Chart As Of Date**. Verify that the **As of Today (Default View)** option is selected to view treatment and conditions with any date, and then click **OK**.



Date	Tooth	Surf	Proc	Prov	Clinic	Description	N	D	M	Stat	AP	Amount
09/28/2022	32		D7140	DSMI...	AF	Extract, erupted th/exposed rt				TP		868.87
09/28/2022	31		15005	DSMI...	AF	Abrasion				CON		
09/28/2022	29	MD	D2392	DSMI...	AF	Resin composite-2s, posterior				E		
09/28/2022	17		D7140	DSMI...	AF	Extract, erupted th/exposed rt				TP		868.87
01/21/2022	14	MOD	D2387	DSMI...	AF	Resin-3 surface +, post-perm				C		158.40
01/21/2022	12	MOD	D2160	DSMI...	AF	Amalgam-3 surf, prim/perm				C		279.69
01/21/2022			D1110	DSMI...	AF	Prophylaxis-adult				C	D	121.86
01/21/2022			D0274	DSMI...	AF	Bitewings-four films				C		84.72
01/21/2022			D0120	DSMI...	AF	Periodic oral evaluation				C	D	54.85
01/21/2022			D0415	DSMI...	AF	Bacteriologic studies				C		128.00
01/21/2022			D0270	DSMI...	AF	Bitewing-single film				C		128.00
06/01/2021			D1110	MHA...	AF	Prophylaxis-adult				C		148.32
11/30/2020	16		D7140	DSMI...	AF	Extract, erupted th/exposed rt				C		825.92

2. On the Progress Notes panel, make sure that the **Treat Plan**, **Completed**, **Existing**, and **Conditions** check boxes are selected to view all types of treatment and conditions.

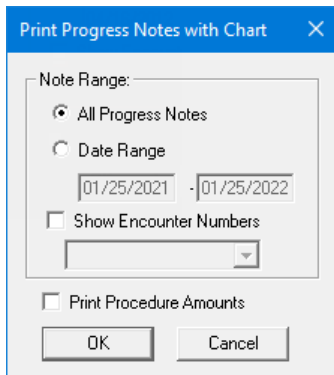
3. To set the default printer for Chart to be a PDF printer driver, do the following:
 - a. On the **File** menu, click **Setup Printer** to open the **DXONE Printer Selection** dialog box.



- b. Under **Select Printer Area**, select the **Chart Printer** option.
- c. In the **Select Chart Printer** list, select a PDF printer driver, such as "Microsoft Print to PDF."
- d. Click **OK**.

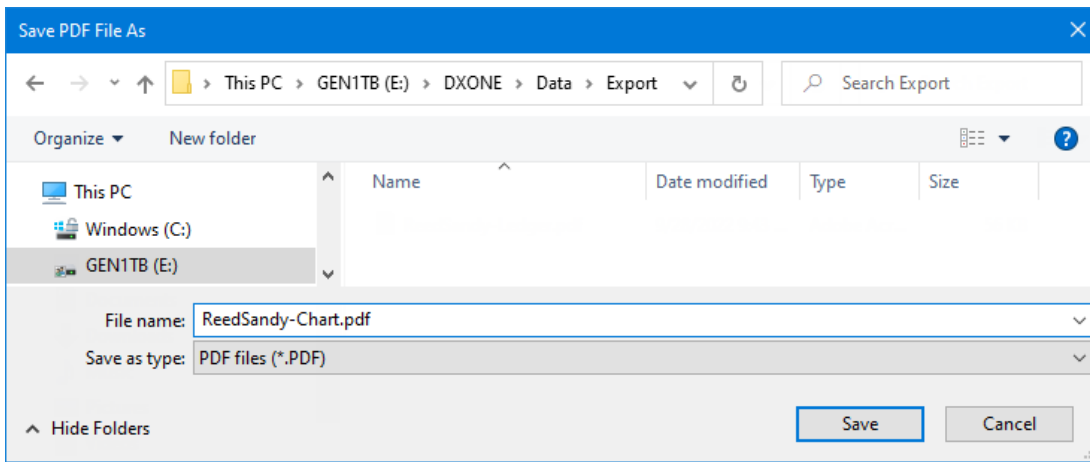
4. Click the **Print Progress Notes With Chart** button  on the Progress Notes panel.

The **Print Progress Notes with Chart** dialog box appears.



5. Set up the following options:
 - **Note Range** - Select the **All Progress Notes** option to print all displayed progress notes.
 - **Show Encounter Numbers** - To print encounter numbers instead of Social Security Numbers, select this check box; otherwise, clear this check box to print Social Security Numbers. With this check box selected, from the list, select one of the encounter numbers that have been used for the patient so only the procedures that are associated with the selected encounter number will appear on the report.
 - **Print Procedure Amounts** - To include amounts for procedures that appear on the report, select this check box; otherwise, clear this check box to not include the amounts.
6. Click **OK**.

The **Save PDF File As** dialog box appears.



7. Select where to save the file, enter a name for the file, and then click **Save**.

Patient Progress Notes

Patient: Sandy Reed
Birthdate: 11/11/1977
Provider: Dennis Smith D.M.D
Phone: (801)555-1111
Office: 1234 Pine Dr
 Americcan Fork, UT 11111

Date: 09/28/2022
SS#:

Chart #:

Progress Notes

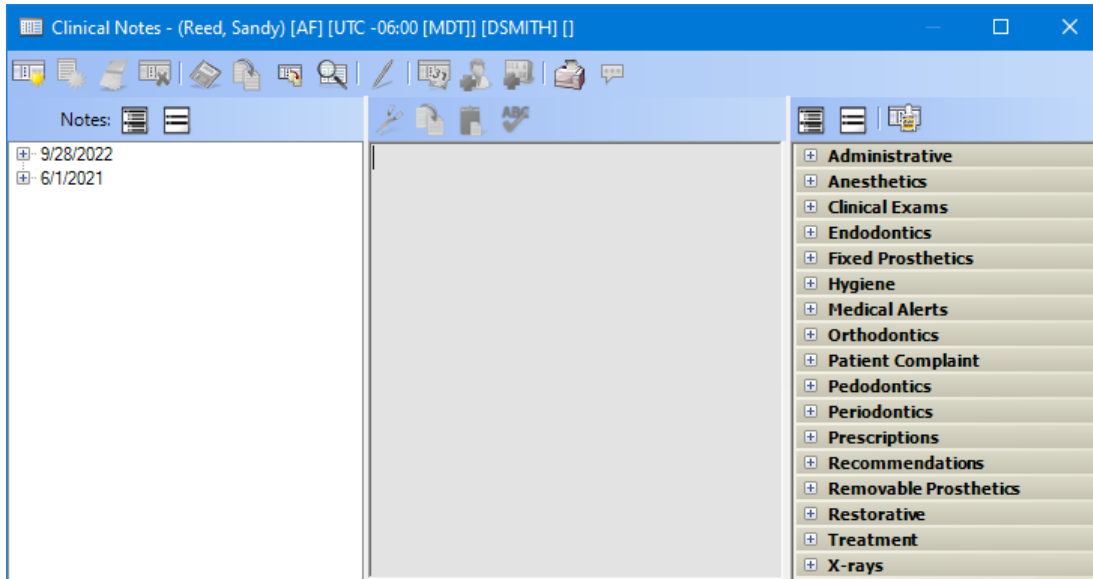
Date	Tooth Surf	Proc	Prov	Clinic	Description	Stat AP	Amount
09/28/2022	32	D7140	DSMITH	AF	Extract,erupted th/exposed rt	TP	868.87
09/28/2022	31	15005	DSMITH	AF	Abrasion	CON	
09/28/2022	29	MD D2392	DSMITH	AF	Resin composite-2s, posterior	E	
09/28/2022	17	D7140	DSMITH	AF	Extract,erupted th/exposed rt	TP	868.87
01/21/2022	14	MOD D2387	DSMITH	AF	Resin-3 surface +, post-perm	C	158.40
01/21/2022	12	MOD D2160	DSMITH	AF	Amalgam-3 surf. prim/perm	C	279.69

Clinical Notes

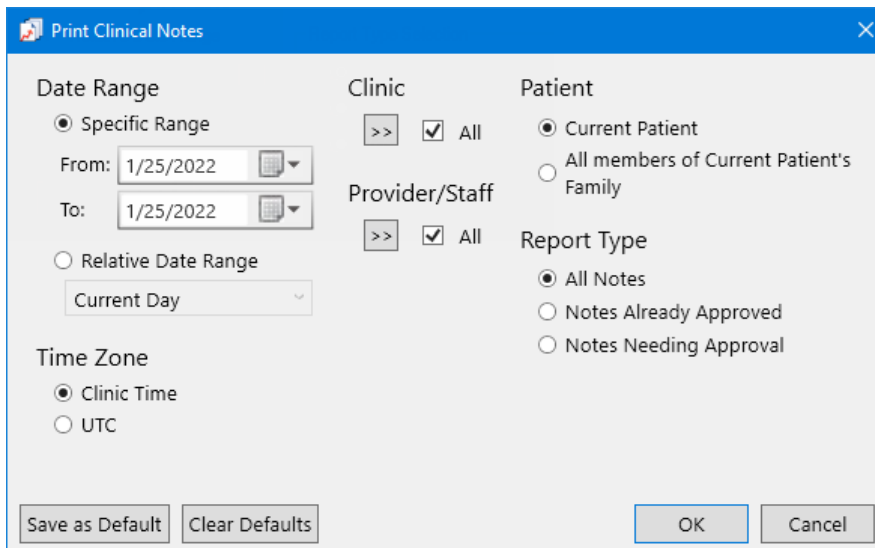
You can export the notes in a patient's Clinical Notes record.

To export a patient's Clinical Notes record

1. In Clinical Notes, click the **Print** button  on the toolbar.

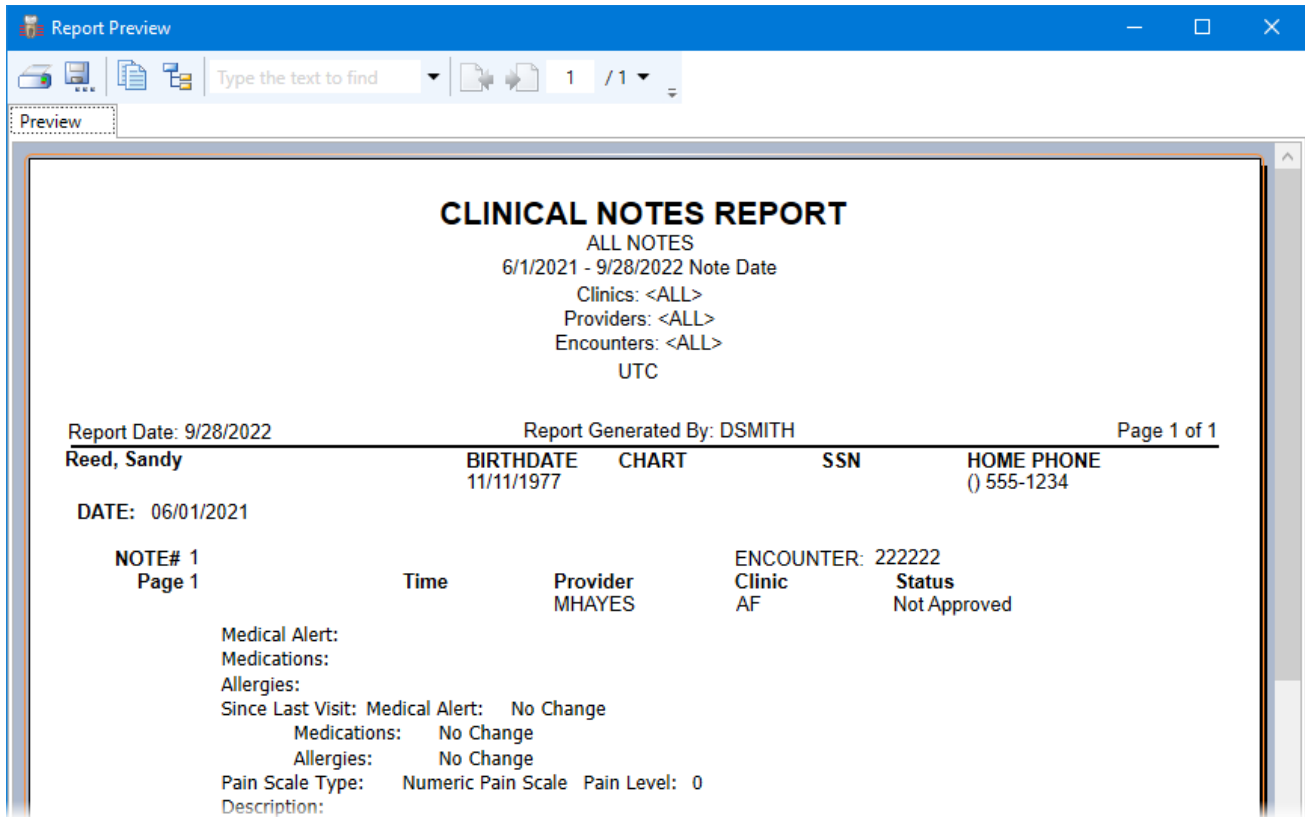


The **Print Clinical Notes** dialog box appears.



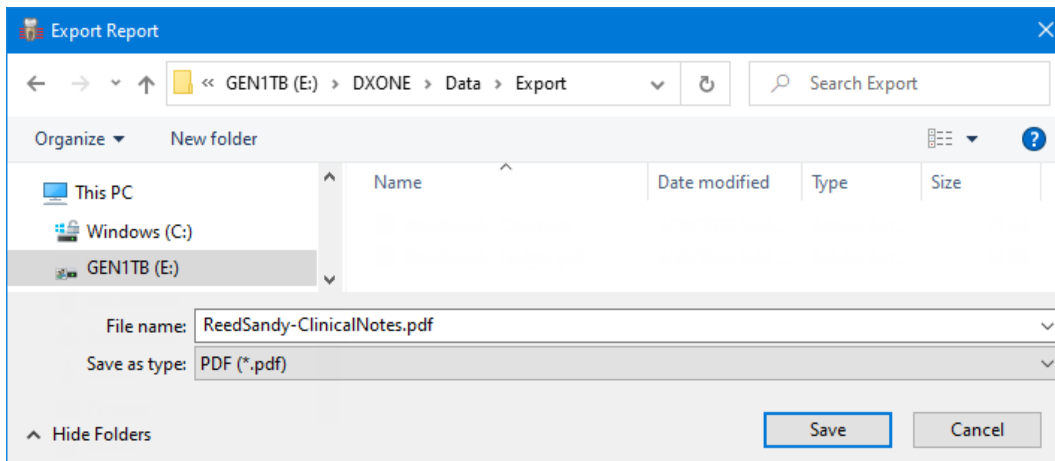
2. Set up the following options:
 - **Date Range** - To include clinical notes for all dates, select the **Specific Range** option, and then enter a date range that includes the dates of the patient's first and most recent clinical notes in the **From** and **To** boxes.
 - **Time Zone** - Select one of the following options:
 - **Clinic Time** - To use the clinic time zone to determine if a clinical note is within the date range for the report.
 - **UTC** - To use Coordinated Universal Time to determine if a clinical note is within the date range for the report.
 - **Clinic** - To include all clinics that you are allowed to generate the report for, select the **All** check box.

- **Provider/Staff** - To include all providers that are associated with clinical notes, select the **All** check box.
 - **Patient** - To include clinical notes for the current patient select the **Current Patient** option.
 - **Report Type** - To include all clinical notes, select the **All Notes** option.
3. Click **OK** to preview the report.



4. Click the **Export Report** button .

The **Export Report** dialog box appears.



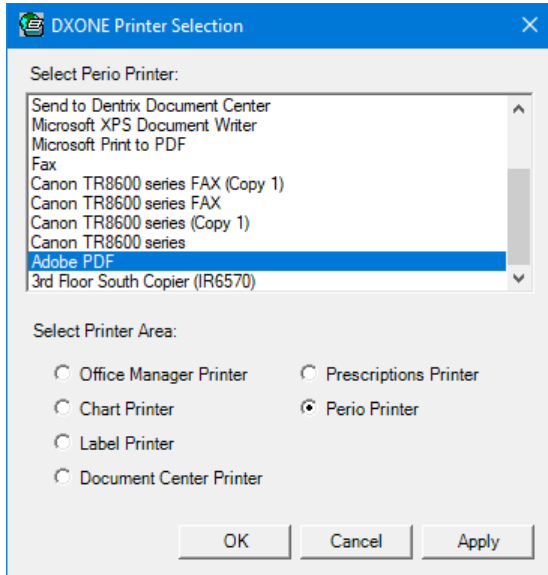
5. Select where to save the file, enter a name for the file, and then click **Save**.
6. On the message that appears, click **OK**.

Periodontal Exams

You can export the graphic and date chart for each periodontal exam in a patient's Perio Chart record. Also, you can export perio diagnostic notes for each periodontal exam in the patient's Perio Chart record. You must generate the reports for each exam separately.

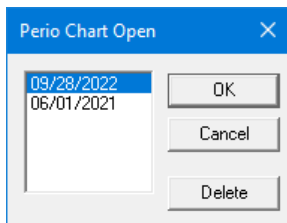
To export a patient's Perio Chart record

1. In Perio Chart, to set the default printer for Perio Chart to be a PDF printer driver, do the following:
 - a. On the **File** menu, click **Printer Setup** to open the **DXONE Printer Selection** dialog box.



- b. Under **Select Printer Area**, select the **Perio Printer** option.
 - c. In the **Select Chart Printer** list, select a PDF printer driver, such as "Microsoft Print to PDF."
 - d. Click **OK**.
2. If the perio exam that you want to view is not already being displayed in Perio Chart, on the **File** menu, click **Open Existing Exam**.

The **Perio Chart Open** dialog box appears.



3. Select the date of the correct exam.
4. Click **OK**.

The exam appears.

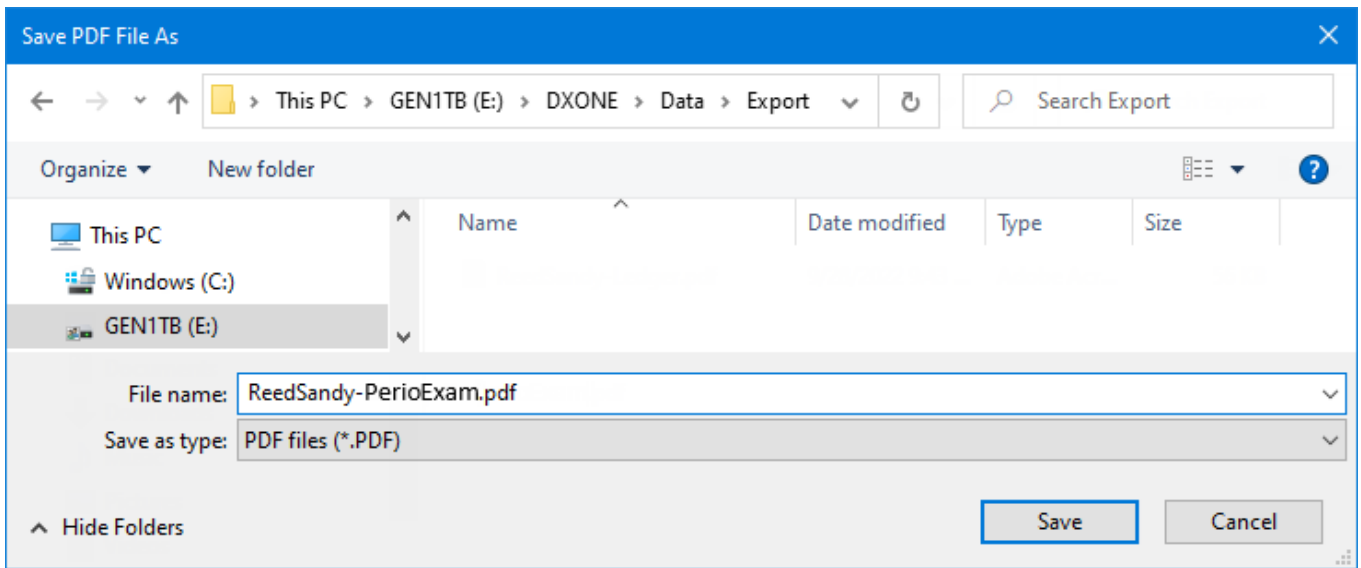
File	Options	Perio Score	Setup	Date	Provider	Diagnostics	Summary	Help								
T#	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
PD		112	212	222	212	112	313	211	211	212	121	212	332	222	112	
Bld																
Sup																
GM																
CAL		112	212	222	212	112	313	211	211	212	121	212	332	222	112	
MG																
FG																
TC	M															M
PMB																
PD		232	221	222	122	221	221	223	322	212	221	122	222	212	111	
Bld																
Sup																
GM																
CAL		232	221	222	122	221	221	223	322	212	221	122	222	212	111	
MG																
PD	333	232	221	121	231	321	213	211	121	231	211	221	212	112	122	333
Bld																
Sup																
GM																
CAL	333	232	221	121	231	321	213	211	121	231	211	221	212	112	122	333
MG																
FG																
TC																
PMB																
PD	222	222	232	322	222	222	122	322	122	222	212	111	211	121	233	132
Bld																
Sup																
GM																
CAL	222	222	232	322	222	222	122	322	122	222	212	111	211	121	233	132
MG																
T#	32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17

- On the **File** menu, click **Print**.

The **Perio Print Selections** dialog box appears.

- To print the graphic and data chart, select the **Combined Graphic & Data Chart** check box (it will print in color if sent to a color printer).
- Click **Print**.

The **Save PDF File As** dialog box appears.



8. Select where to save the file, enter a name for the file, and then click **Save**.

Perio Examination

Patient: Sandy Reed **Date:** 09/28/2022
Birthdate: 11/11/1977 **Chart #:** **SS#:**
Provider: Dennis Smith D.M.D.
Phone: (801)555-1111
Office: 1234 Pine Dr
 American Fork, UT 11111

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD	112	212	222	212	112	313	211	211	212	121	212	332	222	112	112	
GM																
CAL	112	212	222	212	112	313	211	211	212	121	212	332	222	112	112	
MG																

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD	232	221	222	122	221	221	223	322	212	221	122	222	212	111	112	
GM																
CAL	232	221	222	122	221	221	223	322	212	221	122	222	212	111	112	
MG																

RIGHT **LEFT**

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD	333	232	221	121	231	321	213	211	121	231	211	221	212	112	122	333
GM																
CAL	333	232	221	121	231	321	213	211	121	231	211	221	212	112	122	333
MG																

	DCM	DCM	DCM	DCM	DCM	DCM	DCM	DCM	MCD	MCD	MCD	MCD	MCD	MCD	MCD	
PD	222	222	232	322	222	222	122	322	122	222	212	111	211	121	233	132
GM																
CAL	222	222	232	322	222	222	122	322	122	222	212	111	211	121	233	132
MG																

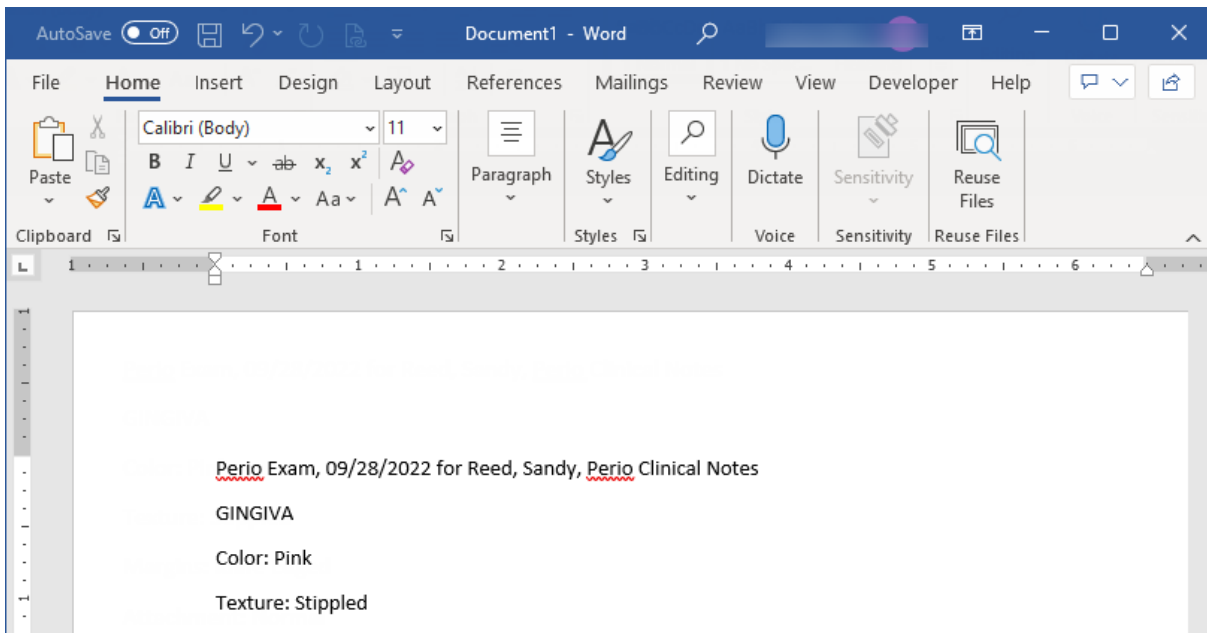
GM = Gingival Margin CAL = Clinical Attachment Level MG = Mucogingival Junction
 ● Bleeding ● Suppuration ● Bleeding and Suppuration
 Furcation: F1 ▽ F2 ▽ F3 ▽ F4 ▽ Mobility: 1 2 3 4 PD = Prb Depth

9. In Perio Chart, to view the perio diagnostic notes, click **Diagnostics** on the menu bar.

The **Perio Clinical Notes** dialog box appears.

10. Click **Copy to Clipboard**.

11. In Word, click **Paste** to insert the information into a new document.



12. Click **File**, and then click **Save As** to save the document.

13. Select where to save the file, enter a name for the file, and then click **Save**.

14. Repeat steps 2–13 for any other exams and notes that you need export.

Sending Files with Patient Portal

If your practice has a paid subscription to Updox, you can send the files that you have exported to a patient or a provider with Patient Portal.

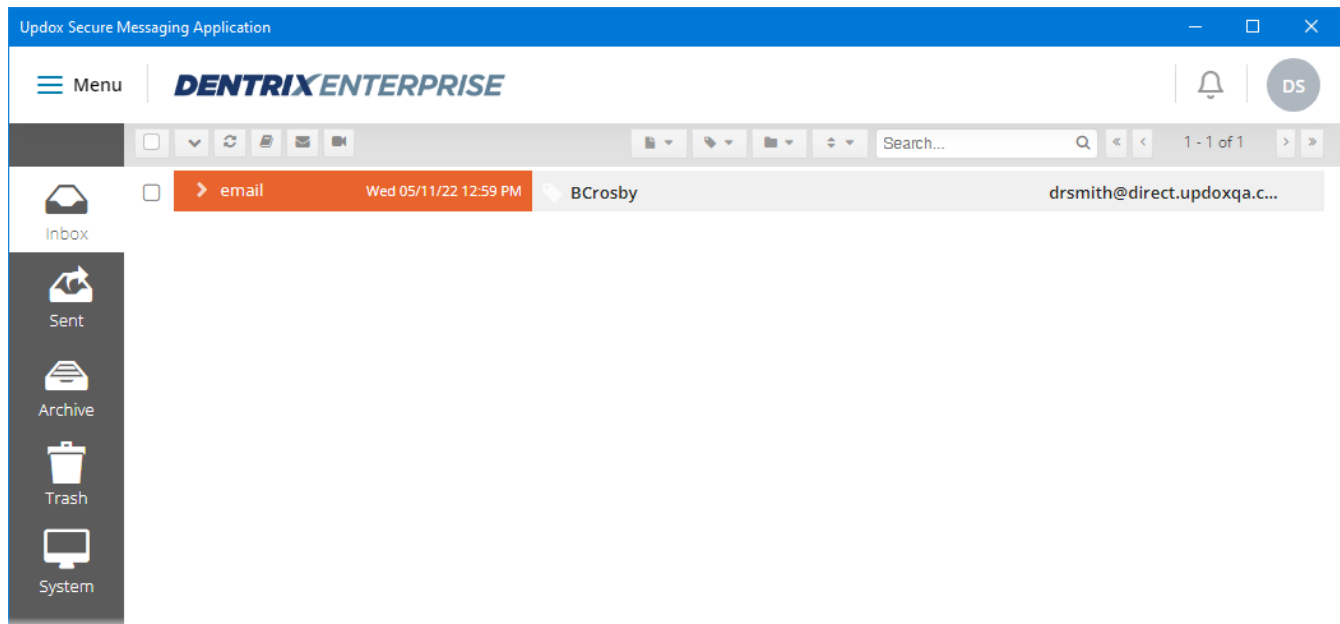
Note: The patient can access their Updox mailbox at no additional charge, but the receiving provider does need a subscription to Updox and a valid DIRECT email address.

To send files with Patient Portal


1. In Chart or Ledger, click the **Updox Application** button  on the toolbar.

Note: You can also access the Updox messaging application from other modules, such as Family File and Office Manager.

The **Updox Secure Messaging Application** window appears.



2. To send a message with attachments to a patient, do the following:

- a. Click the **Compose New Message** button .
- b. In the Search box, begin typing the patient's name. Continue typing as needed to narrow the results. Select the correct patient's name.

Search for a patient, contact, email or fax number...

reed

New	Create contact and send to: reed
Patients	Sandy Reed 44 yrs (1977-11-11)
Contacts	No results
Users	No results
Groups	No results

CANCEL

The destination options appear.

Search for a patient, contact, email or fax number...

reed

Sandy Reed 44 yrs (1977-11-11)

Save to disk

Send to Patient Portal

BACK OK

- c. Select the **Send to Patient Portal** check box, and then click **OK**.
The message options appear.

Compose

44 YRS (1977-11-11) FEMALE

Sandy Reed
Send to Patient Portal from the practice

EHI

Send as practice

If this item is not viewed in the portal, alert me in -- Select --

B I U TEMPLATES ↕ ↺ C Message

The attached files have additional information.

Search for additional contacts or users.

Sandy Reed
Age (DOB): 44 yrs (1977-11-11) Sex: Female

DISK PORTAL

Send to Patient Portal


⚠ Attachments: Drag pages to change sending order. Caution: Any selected pages will be sent. Hover over pages to verify content before sending.

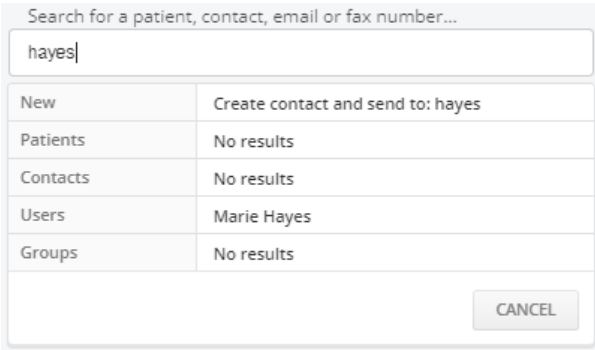
+

Discard **Send**

- d. Enter a subject and message.
e. Add attachments.
f. Click **Send**.

3. To send a message with attachments to the provider, do the following:

- a. Click the **Compose New Message** button .
- b. In the Search box, begin typing the provider's name. Continue typing as needed to narrow the results. Select the correct provider's name.



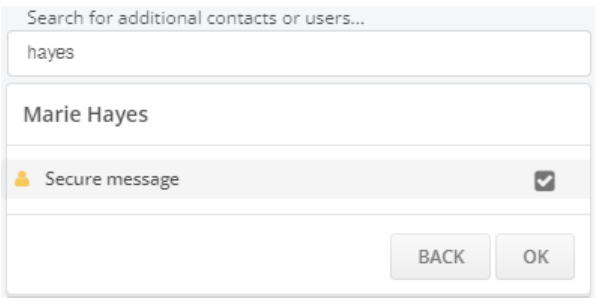
Search for a patient, contact, email or fax number...

hayes|

New	Create contact and send to: hayes
Patients	No results
Contacts	No results
Users	Marie Hayes
Groups	No results

CANCEL

The destination options appear.



Search for additional contacts or users...

hayes

Marie Hayes

Secure message

BACK OK

- c. Select the **Secure message** check box, and then click **OK**.

The message options appear.

The screenshot shows a 'Compose' window for a secure message. The recipient is Marie Hayes, with the subject 'Info for Sandy Reed'. The message body contains the text 'Please see the attached files.' and a plus sign icon for adding attachments. The window includes a search bar for additional contacts, a 'Send as practice' checkbox, and a rich text editor with bold, italic, link, and underline options. A yellow warning banner at the bottom states: 'Attachments: Drag pages to change sending order. Caution: Any selected pages will be sent. Hover over pages to verify content before sending.' The 'Send' button is highlighted in blue.

Compose

Marie Hayes
Secure message from the practice

Info for Sandy Reed

Send as practice

B I TEMPLATES Message

Please see the attached files.

Search for additional contacts or users.

Marie Hayes

SECURE

Secure message

Attachments: Drag pages to change sending order. Caution: Any selected pages will be sent. Hover over pages to verify content before sending.

Discard **Send**

- d. Enter a subject and message.
- e. Add attachments.
- f. Click **Send**.


Sending Files by Email

If your computer has a MAPI-compliant email program installed, you can send the files that you have exported to a patient or a provider by email.

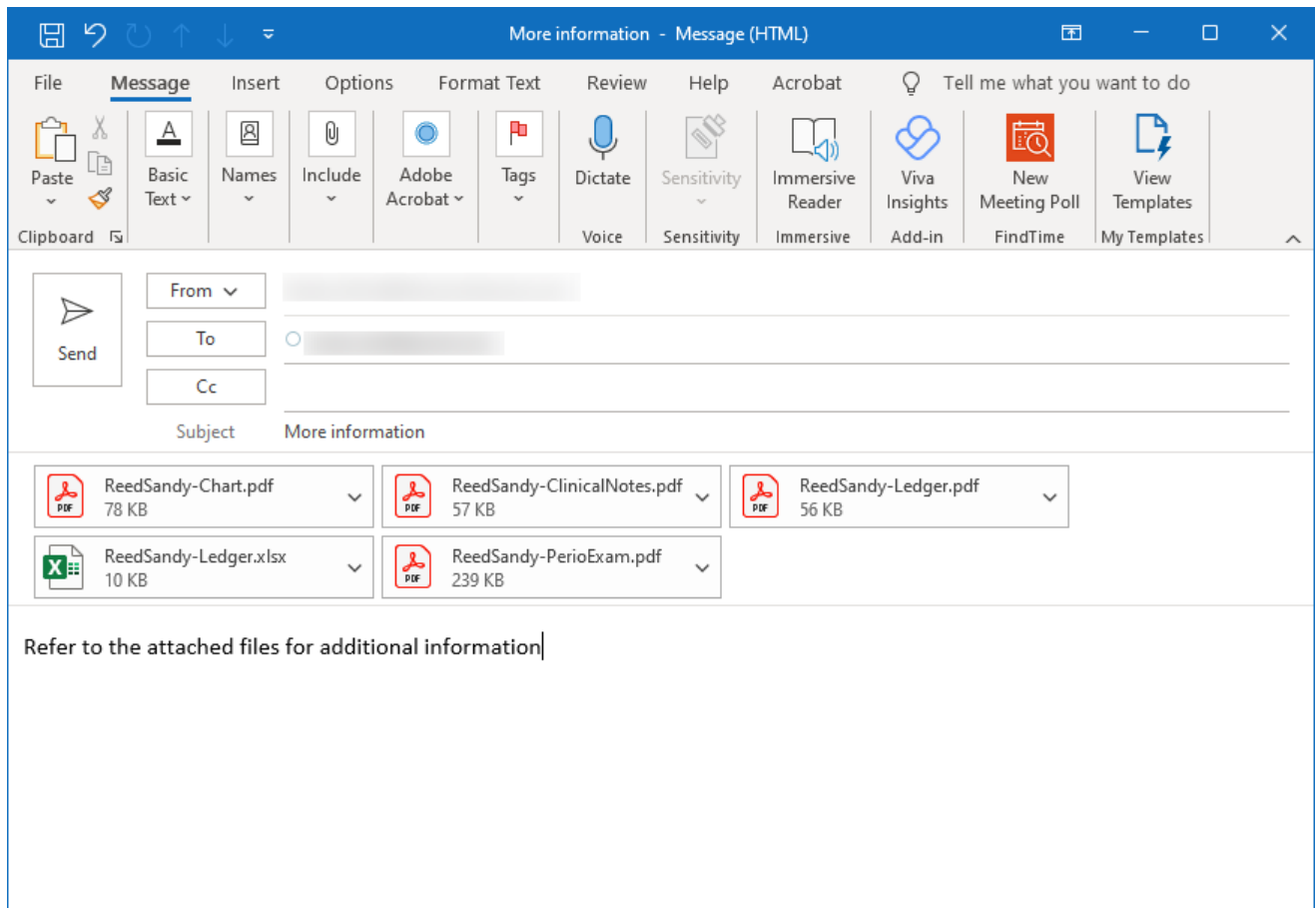
Important: You should always encrypt messages and attachments that contain patient information.

To send files by email

In Family File, do any of the following:

- To send an email with attachments to the patient and/or provider, do the following:
 - a. Click the **Send Message** button  on the toolbar.

The email program opens.



- b. Add the recipients' email addresses.
- c. Enter a subject and message.
- d. Add attachments.
- e. Click **Send**.

- To send an email with attachments to the provider that is associated with a referral, do the following:
 - Double-click the **Referred To** block.

Dentrix Family File - (Reed, Sandy) [AF] [UTC -06:00 [MDT]] [DSMITH] []

File Edit Help

Medical Alerts Employer Cont. Care **07/22/22 PROPHY**

Name: Reed, Sandy
Address: 1234 Sage Rd
 American Fork, UT 11111
Phone: H 555-1234
Status: Active, F, Single, Guar, Ins, H-of-H

Consent:
First Visit: 12/17/2018
Last Visit: 01/21/2022
Missed Appt:

Chart #:
Clinic: AF
SS#:
BirthDay: 11/11/1977, 44
Provider: DSMITH
Fee Sched: 1. OFFICE

Insurance: Dental Primary
Company: Acme Insurance Co
Group Plan: HS1 Dental Plan
Group #: 112233
Fee Sched: 6. ACME Preferred
Coverage: 0.00 **Used:** 1721.46
Ded. S/P/O: 100/0/0 **Met:** 100/0/0

Patient Notes
 (No Note)

0-->30	31-->60	61-->90	91-->	Suspended	Balance
706.96	0.00	0.00	0.00	-35.00	671.96

Referred By
Referred To 06/01/2021
 Charles M. Clark, M.D. (Surgery, Oral & Maxillofaci)

Status	Name	Position	Gender	Patient	BirthDay
HofH Guar Ins	Reed, Sandy	Single	Female	Yes	11/11/1977

The **Patient Referrals** dialog box appears.

Patient Referrals -Reed, Sandy

Referred By

Name	Date

Edit
 Analysis
 Add Referral
 Clear Referral

Referred To

Name	Date
Charles M. Clark, M.D. (Surgery, Oral & Maxillofacial)	06/01/2021

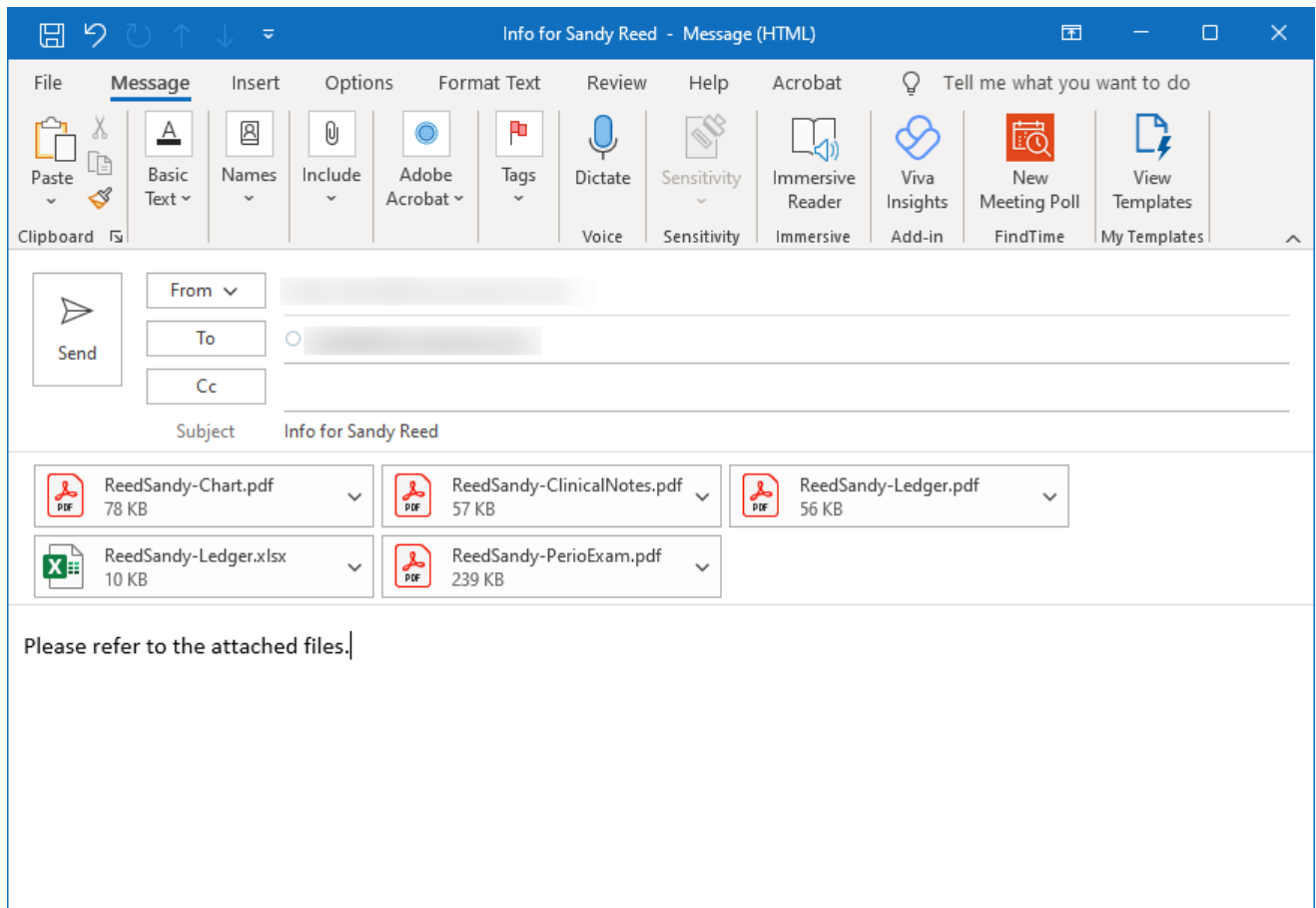
Edit
 Analysis
 Add Referral
 Clear Referral

Send Email Print Label Quick Letters

Close

- In the **Referred By** or **Referred To** list, select a referral.
- Click **Send Email**.

The email program opens.



- d. Add the recipient's email address (if not already entered).
- e. Enter a subject and message.
- f. Add attachments.
- g. Click **Send**.