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:

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®.

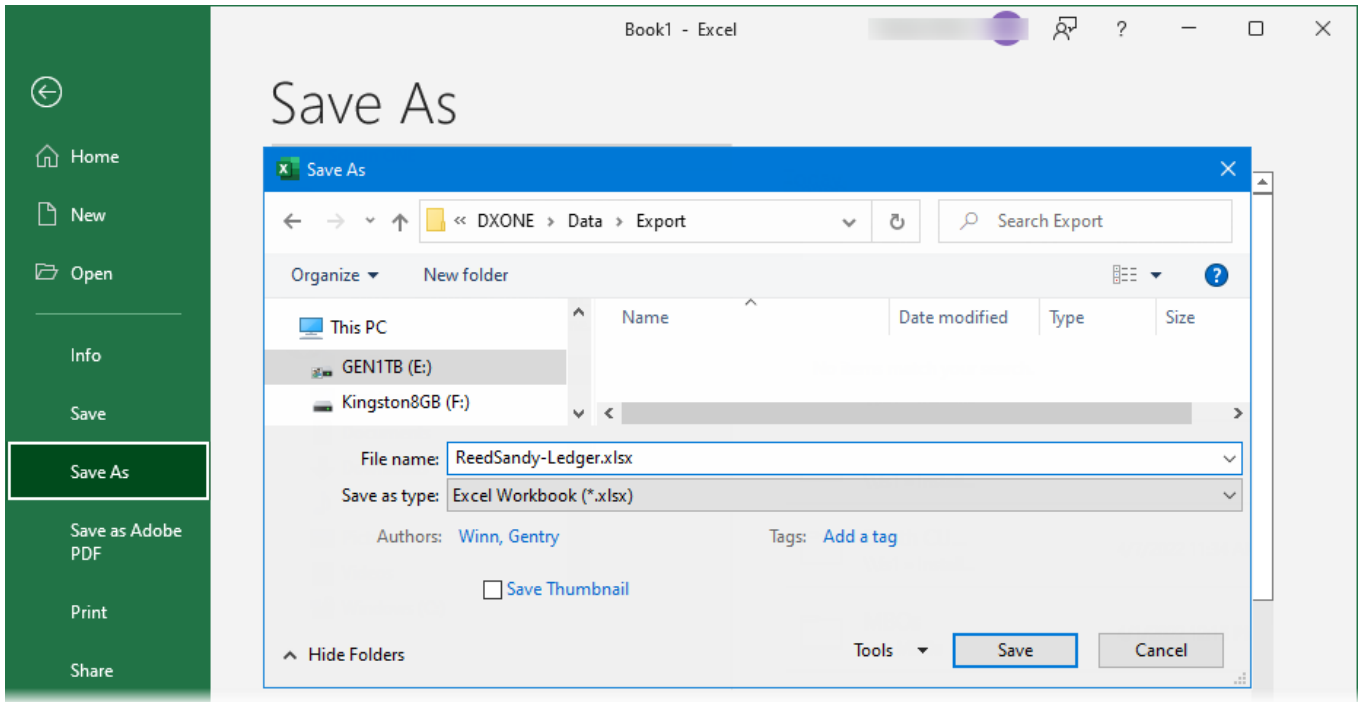**To export a patient's Ledger record**

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

2. On the **File** menu, click **Copy to Clipboard**.

3. In Excel, click **Paste** to insert the information into a new workbook.

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**.

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.
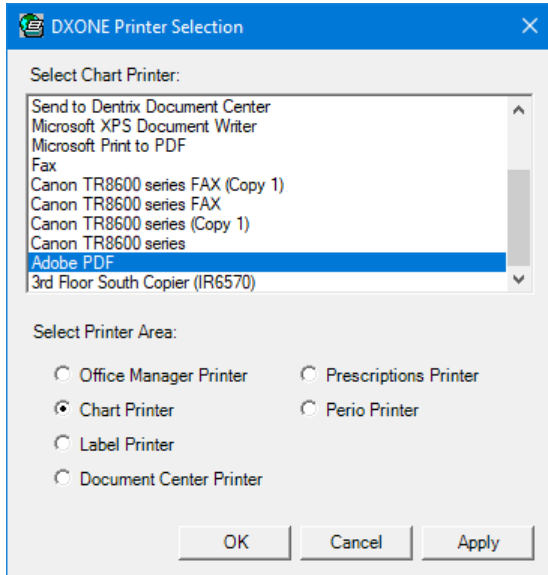
    b. Under **Select Printer Area**, select the **Chart Printer** option.

    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.
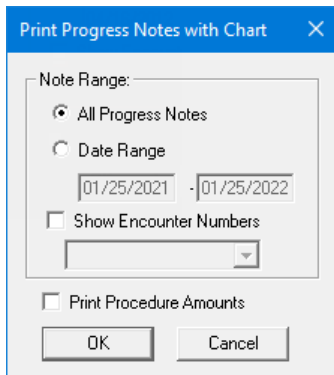
5. Set up the following options:

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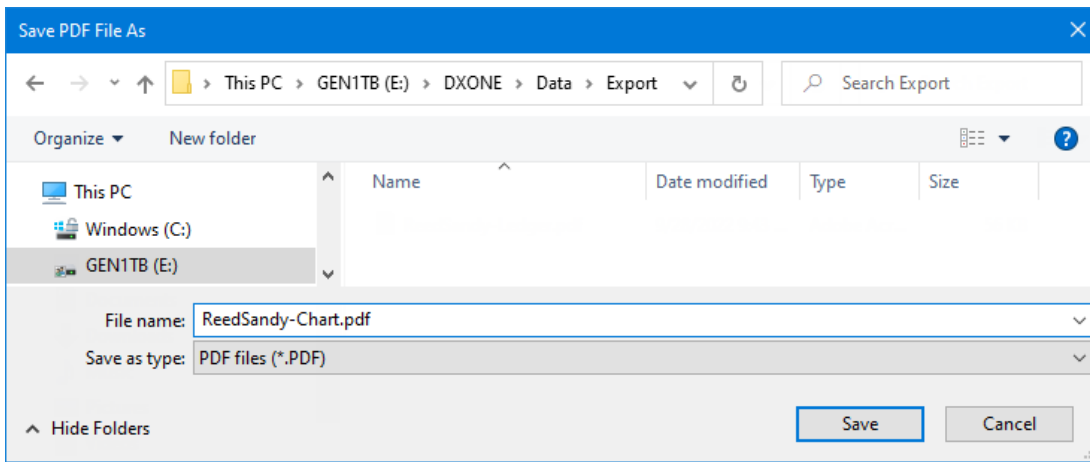
7. Select where to save the file, enter a name for the file, and then click **Save**.

<div align="center">

Patient Progress Notes

</div>

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	
Americcan Fork, UT 11111	

<div align="center">

Progress Notes

</div>

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 ![printer icon] on the toolbar.
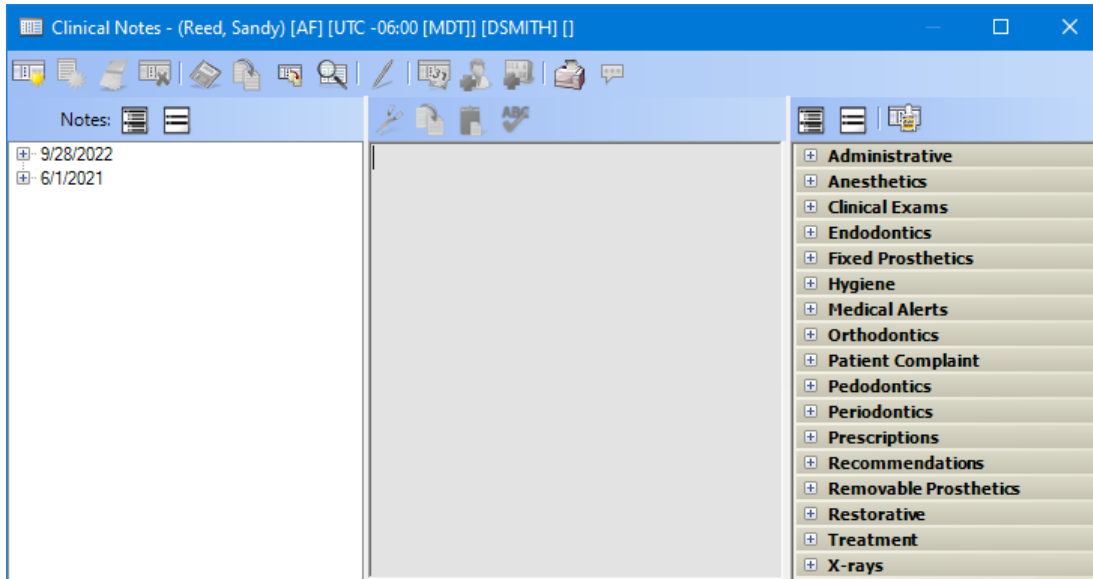
The **Print Clinical Notes** dialog box appears.

2. Set up the following options:

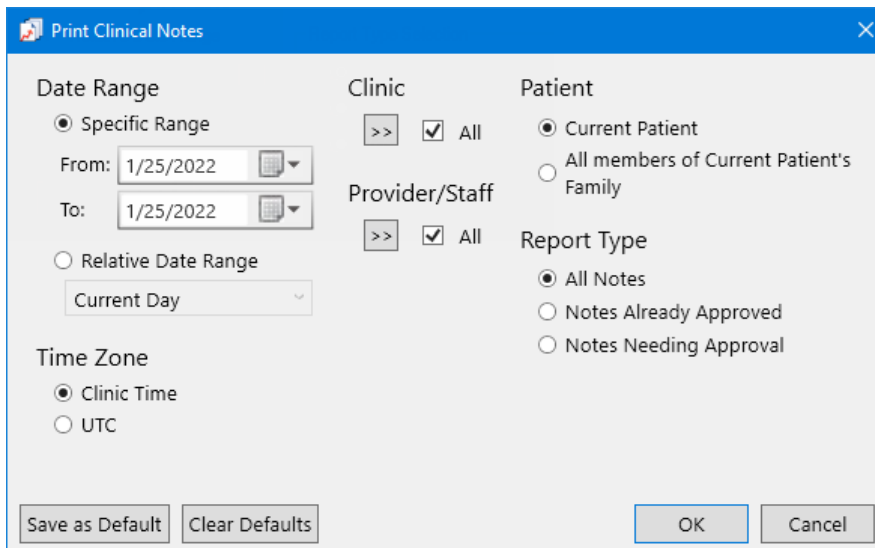- **Date Range** - To include clinical notes for all dates, select the **Specific Range** option, and then enter a date range that includes the dates of the patient's first and most recent clinical notes in the **From** and **To** boxes.

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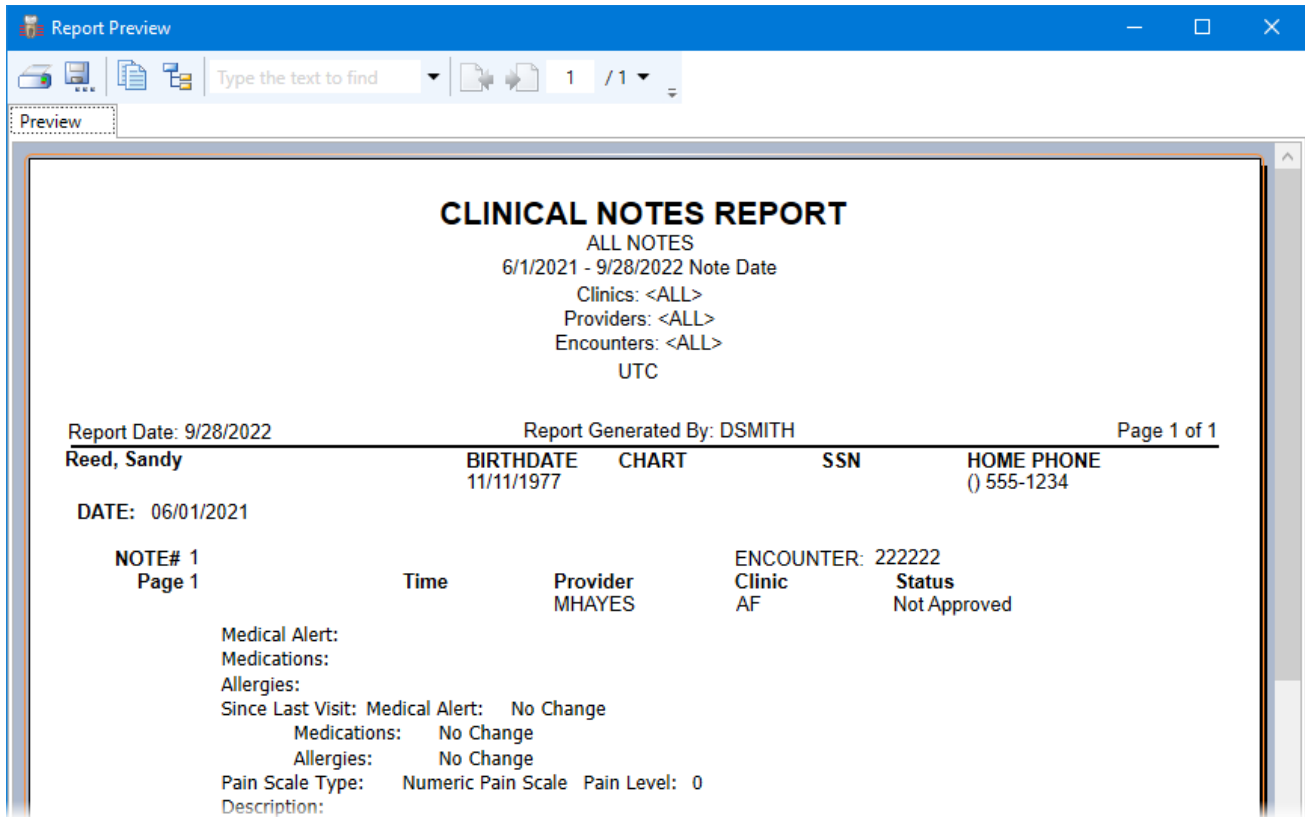
4. Click the **Export Report** button .

   The **Export Report** dialog box appears.
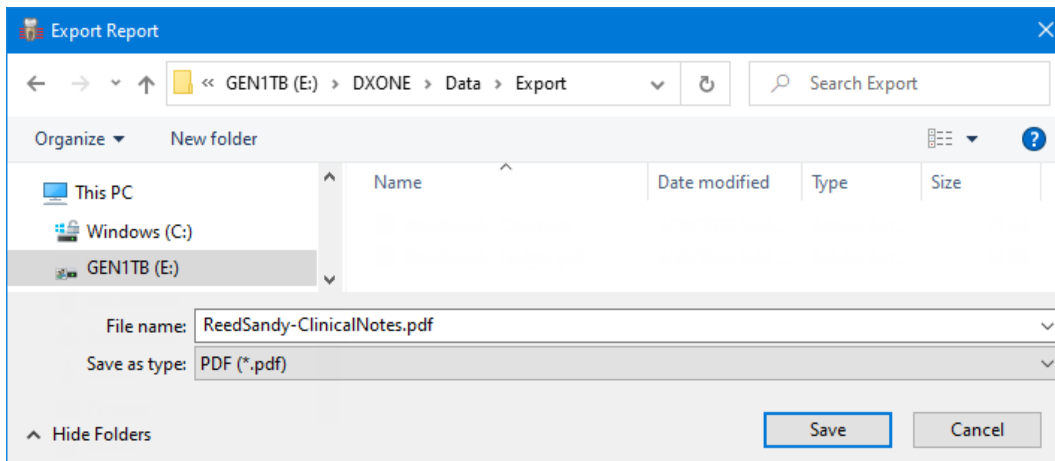
5. Select where to save the file, enter a name for the file, and then click **Save**.

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.
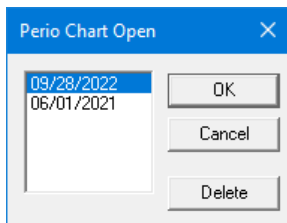
To export a patient's Perio Chart record

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.
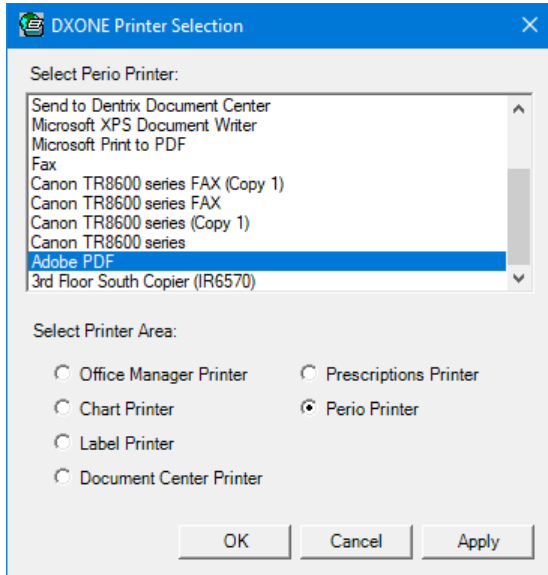
    b. Under **Select Printer Area**, select the **Perio Printer** option.

    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.

5. On the **File** menu, click **Print**.
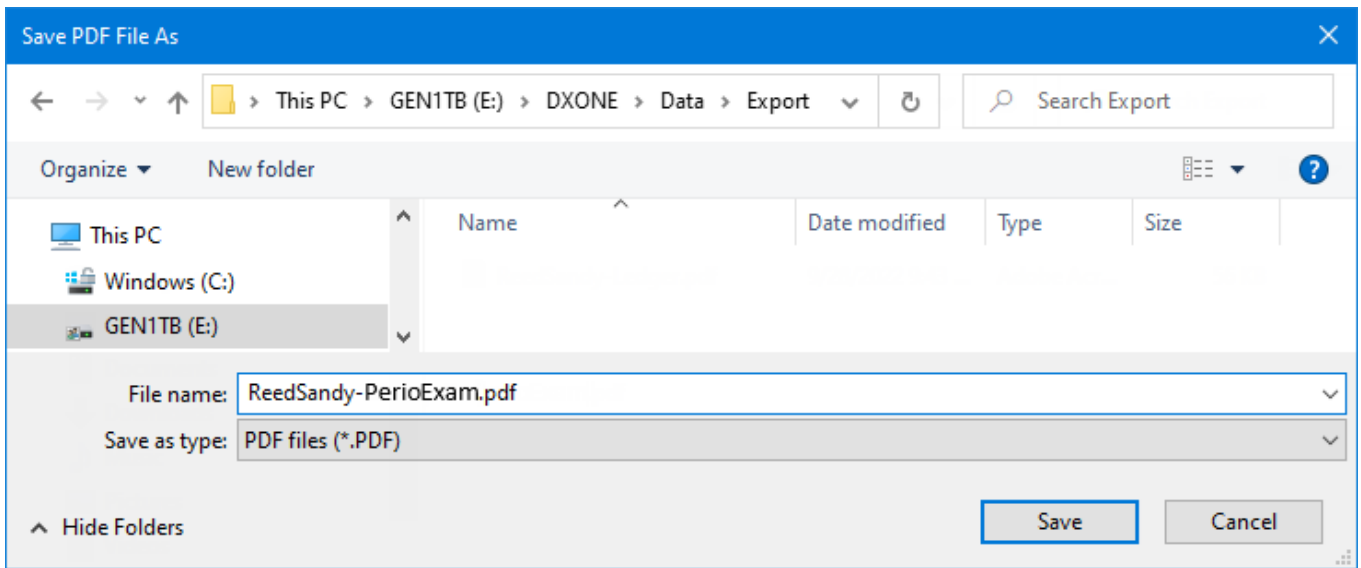
   The **Perio Print Selections** dialog box appears.

6. 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).

7. 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
Americcan Fork, UT 11111

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

Teeth (FACIAL / MAXILLARY / LINGUAL): 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16

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

RIGHT ————————————————— LEFT

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

Teeth (LINGUAL / MANDIBULAR / FACIAL): 32 31 30 29 28 27 26 25 24 23 22 21 20 19 18 17

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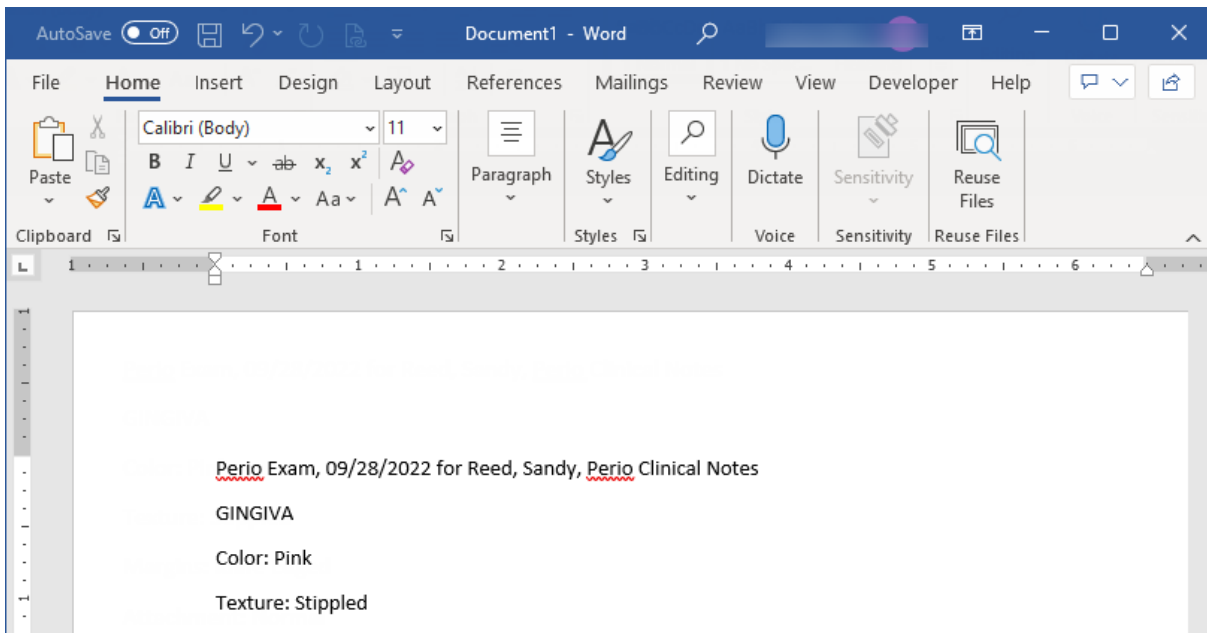
12. Click **File**, and then click **Save As** to save the document.

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 ![icon] 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.
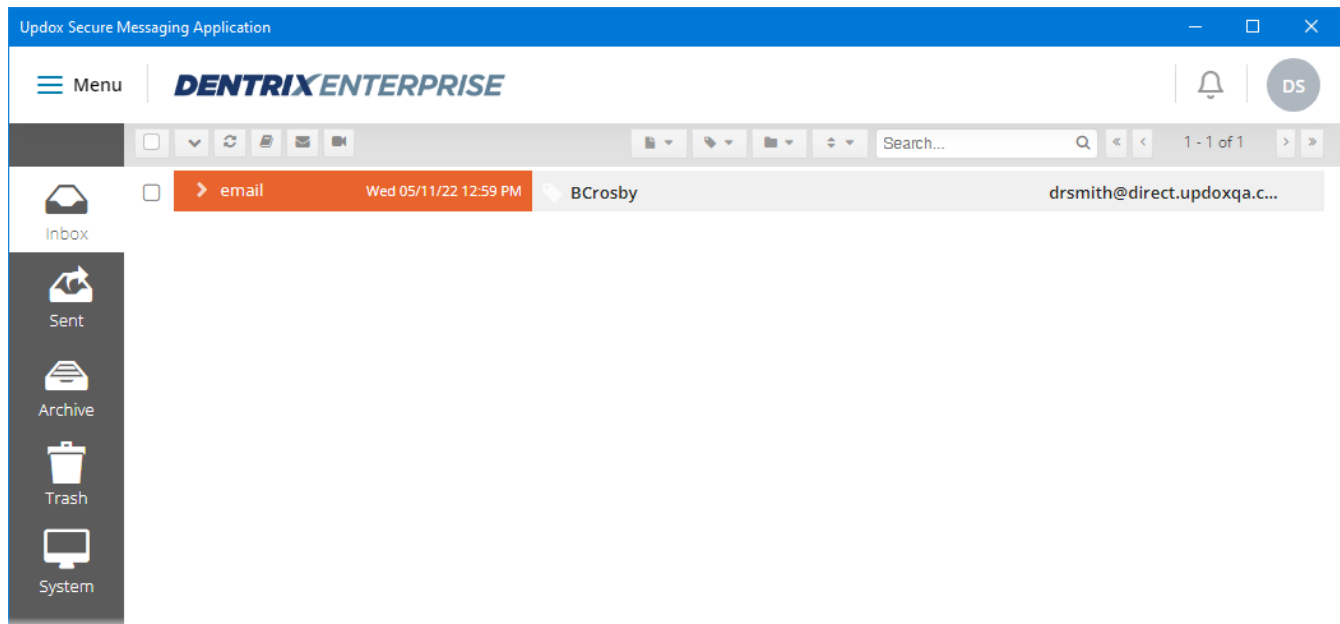
2. To send a message with attachments to a patient, do the following:

    a. Click the **Compose New Message** button ![icon] .

    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.
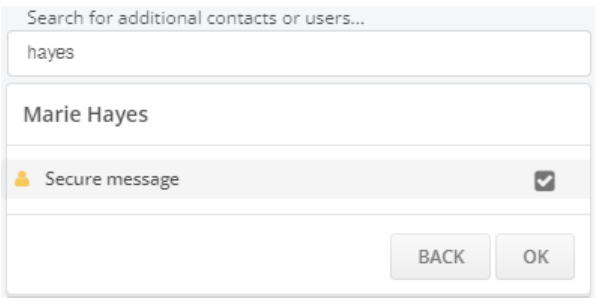

    The destination options appear.

c. Select the **Send to Patient Portal** check box, and then click **OK**.

The message options appear.

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.

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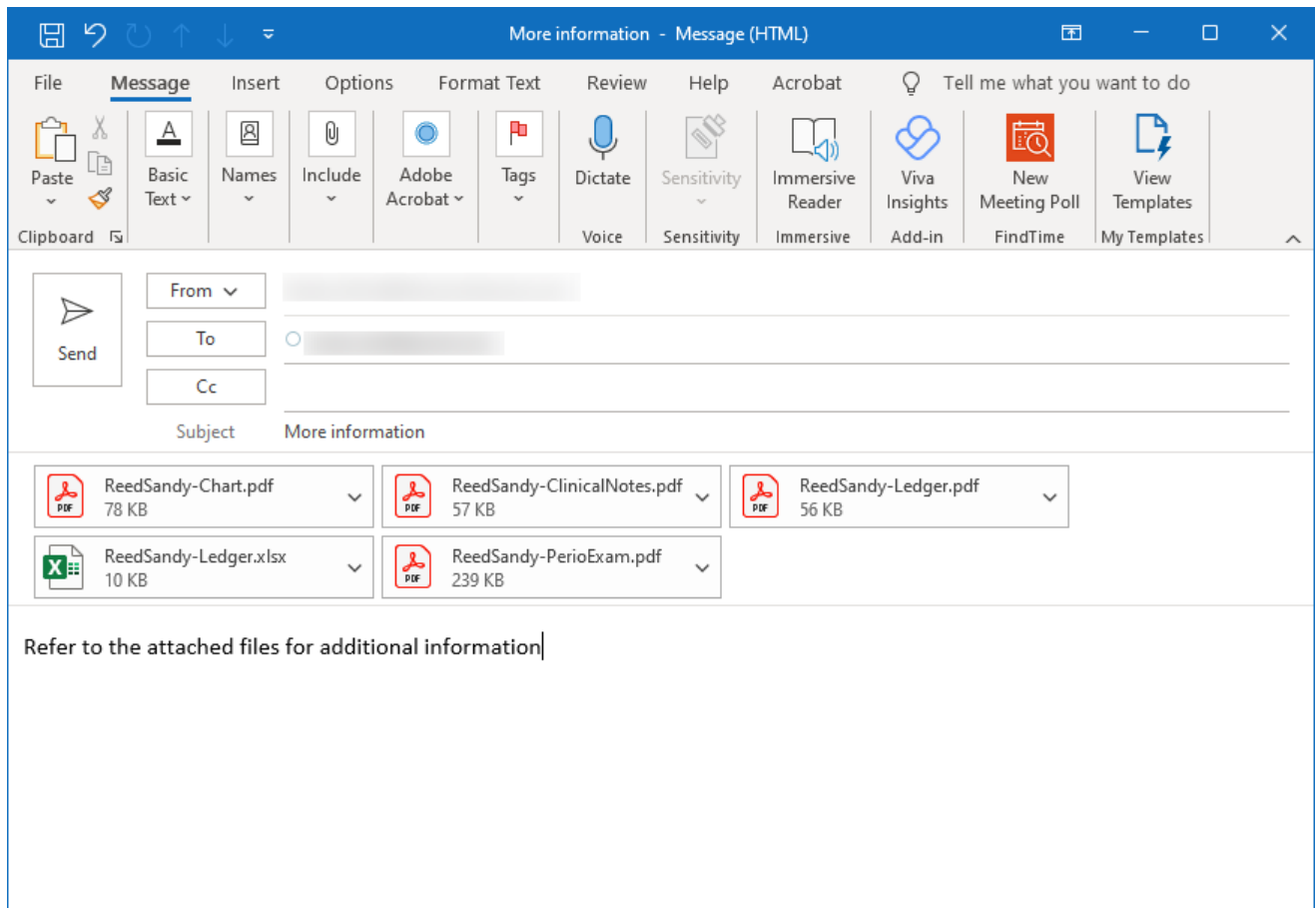
Important: You should always encrypt messages and attachments that contain patient information.

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:
    a. Double-click the **Referred To** block.

The **Patient Referrals** dialog box appears.

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

The email program opens.
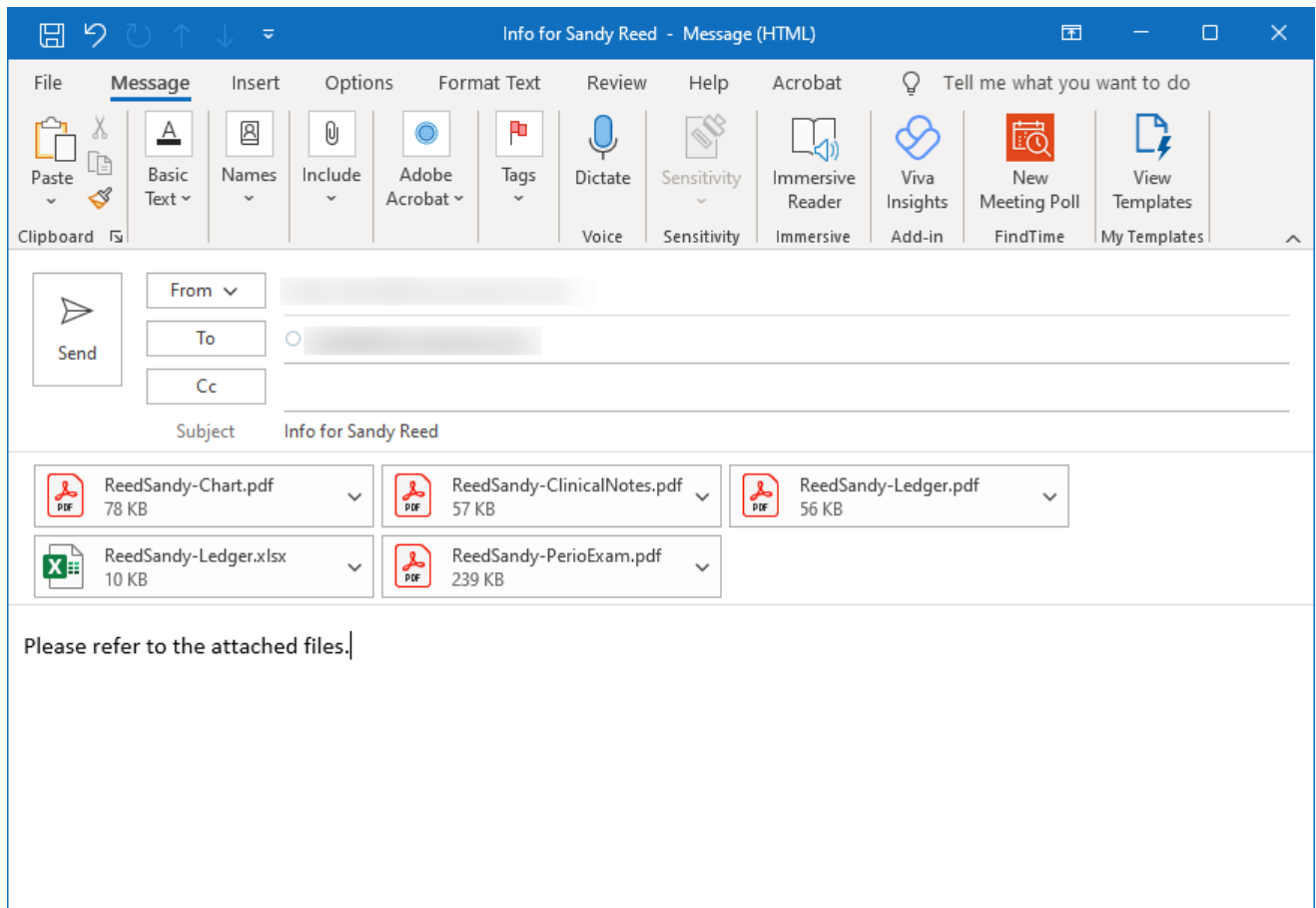
d. Add the recipient's email address (if not already entered).

e. Enter a subject and message.

f. Add attachments.

g. Click **Send**.