DENTRIX ENTERPRISE

DENTRIX ENTERPRISE 11

RELEASE GUIDE

HENRY SCHEIN ONE

PUBLICATION DATE

April 2019

COPYRIGHT

SOFTWARE LICENSE NOTICE

LICENSES AND TRADEMARKS

Contents

11.0

Dentrix Enterprise 11.0
Release Guide

Overview

The *Dentrix Enterprise 11.0 Release Guide* provides information about the new software release. This overview section includes a brief description of the new features and enhancements available in this release, instructions regarding the installation of the new version, and important notes.

Note: For information about using the new features in this release, refer to "Using the New Features and Enhancements" in this document or the "What's New in Dentrix Enterprise?" portion of the Dentrix Enterprise Help.

Features

Dentrix Enterprise 11.0 includes the following new features and enhancements:

- **Editing Clinical Notes from the Signature Manager** – You can now edit or add information to an unsigned clinical note from the Signature Manager. You no longer have to open the corresponding patient's record, open the Clinical Notes module, select the correct note page, make the necessary changes to the note, and then return to the Signature Manager to sign it.
- **Creating Family Alerts** – When creating a patient alert, you can now specify that the alert is for the family. The family alert appears for the patient and any of that patient's family members (as set up in the Family File) when someone accesses the specified areas of Dentrix Enterprise. If a family alert has been set up to have a flag symbol appear on appointments, the symbol appears on appointments for all family members.
- **Entering Chart Notes** – You can now enter a general note regarding a patient's clinical chart directly in that patient's Chart while performing work on that patient. The note will always be visible to anyone who opens that patient's Chart.
- **Copying Patients** – When you copy a patient, the **Patient Information** dialog box is now named "**Patient Copy Information**," and it has been updated to incorporate the changes that have been made to the **Patient Information** dialog box in previous versions of Dentrix Enterprise.
- **Viewing Birth Dates and Ages on Appointments** – When setting up a view in the Appointment Book, you can now have the date of birth and age appear as one of the line items on each patient's appointment. The patient's birth date and age also appear on the pop-up message that appears when you position your pointer over an appointment.
- **Opening the Treatment Planner** – You can now open the Treatment Planner from the Family File or the Appointment Book.
- **DXOne Reporting Module and Scheduling Service** – This module has been completely redesigned. It has an updated look. Additional report filters are available on some reports, and you can now filter nearly every report by patient tags. Also, there is a new method of installing a service on a server that handles scheduled reports and a new way to configure the report server on a computer from which you schedule report jobs.
- **Adding Implantable Devices** – You can now add implantable devices to a patient's medical alerts. There is a new section in the **Medical Alerts** window that displays those devices. You can inactivate a device and specify a reason for doing so. If a procedure has been flagged as being for an implantable device, when you treatment plan that procedure, you can attach a device to the procedure by editing it, or you can wait to attach the device until you complete the procedure (when you post a completed procedure for an implantable device, Dentrix Enterprise automatically prompts you to attach a device).
- **ViewingViewing attached clinical note prompts** – You can view the information in a clinical note that was entered using a template with prompts by clicking the new **View Prompts** button on the toolbar. You can still edit other parts of the clinical note as in previous versions of Dentrix Enterprise.

- **C-CDA Documents**:
  - **Exporting C-CDA Documents** – When you export a patient's C-CDA document, the patient's implantable devices, completed procedures, treatment-planned procedures, and dental conditions are now included. If the patient's record has a clinical note that was created using a template (such as for documenting SOAP) that includes prompts for an assessment and planned care, that data is now included on the exported C-CDA document.
  - **Importing C-CDA Documents** – When you import a C-CDA document (from an individual's patient health exchange or from the general patient health exchange inbox) that includes the patient's completed procedures, treatment-planned procedures, and dental conditions, you can now reconcile that data with procedures and conditions that are already in the patient's record. Also, if the document includes the patient's implantable devices, you can view those.
  - **Customizing View Settings for C-CDA Documents** – When you are viewing a C-CDA document (from an individual's patient health exchange or from the general patient health exchange inbox), you can now customize which sections appear, and in what order, when you view these types of documents.
- **Exporting from the Patient Health Exchange** – When you are exporting a patient's C-CDA, you can now select which C-CDA version to use for the document, and you can now disable encryption of the exported file.
- **Viewing Patient Messages** – You can view a message from a patient (through the Updox portal), with the **Add this information to my medical chart** check box selected (this is a new option), and with or without attachments, on the new **Patient Messages** tab of the patient health exchange inbox or from the patient's **Medical Alerts** window.
- **Importing Direct File Uploads** – You can now view a DIRECT message (from a provider) or a message from a patient (through the Updox portal), with file attachments (such as image or text files), on the new **Direct File Uploads** tab of the patient health exchange inbox. From there, you can also attach the message and the attached files to a patient's record.
- **File Exchange**:
  - **Performing Patient Data Exports (Local)** – When you are exporting patient data, you can now filter your patient search results by provider and by visit date. You can now select which C-CDA version to use for C-CDA documents.
  - **Performing Exports to a File Exchange Site** – When you are exporting patient or provider/staff data to a file exchange site, you can now specify a name for the file group that gets exported. Also, you can view the history of file group exports.
  - **Scheduling Patient Data Exports** – You can now schedule the export of patient data to a file exchange site. And, you can view and delete scheduled export jobs.
- **Practice Definitions**:
  - **Customizing an Ethnicity Definition** – You can now map a CDC ethnicity code to an ethnicity definition, and you can use the name of that CDC ethnicity code as the definition's description.
  - **Customizing a Race Definition** – You can now map a CDC race code to a race definition, and you can use the name of that CDC race code as the definition's description.
  - **Customizing a Sexual Orientation Definition** – You can now map a standard description to a sexual orientation definition, and you can use that standard description as the definition's description.
  - **Customizing a Gender Identity Definition** – You can now map a standard description to a gender identity definition, and you can use that standard description as the definition's description.
  - **Customizing a Language Definition** – You can now map an ISO 639-2 Alpha-3 language code to a language definition, and you can use the name of that ISO language code as the definition's description.

- **Inactivating and reactivating ADA-CDT dental codes** – You can now inactivate the procedure codes that you do not want to post in your practice. An inactive procedure codes is not available throughout Dentrix Enterprise for any clinic. However, you can reactivate any inactive procedure code as needed.
- **Sending a Link for a Patient Education Topic** – After you view a patient education topic, in the **Record Patient Education** dialog box that appears, there is now a **Send link to portal** check box. With the check box selected, when you click **Record**, a message with the specified URL is sent to the patient's Updox portal.
- **Entering Patient Health Assessments** – There are additional vitals that you can include in an assessment. The new vitals appear in clinical notes that are generated automatically as the result of adding an assessment as part of completing a medical history review. You can also use the new vitals to create a global alert.
- **Adding Resources to Global Alerts** – You can now add diagnostic and therapeutic resources to a global alert.
- **Tracking Emergency Access** – An entry for a user being granted emergency access to a patient's record can now appear on the Audit-Combined Report or the Patient Information Accessed Report.
- **Editing Patient Information** – In the **More Information** window, the patient's name is now a link that you can click to open the **Patient Information** dialog box so that you can edit the patient's information without having to open the patient's Family File.
- **Entering a Patient's Health Concerns** – You can now enter, edit, and delete health concerns that a patient has expressed.
- **Filtering the Treatment Request List** – You can now filter the list of treatment requests that appear in the Treatment Request Manager by statuses.
- **Generating the Patient List** – You can now save a set of filters and data fields as a template to quickly generate a list of patients that match that criteria. Also, you can now include patient tags and billing types as data fields of the generated list.
- **Reporting for Stage 3 Meaningful Use** – You can now generate the Meaningful Use Measure Calculation List for the stage 3 measures.
- **Selecting Patients** – The **Select Patient** dialog box has been optimized so that it and its **Search By** and **Advanced Search** tabs open faster. Also, there is a new clinic setting that determines, when you are searching for a patient, whether Dentrix Enterprise automatically displays matches as you type your search criteria, or you have to enter your search criteria and then click **Search** to view matches.
- **New Security Rights**:
  - **Central Clinic Only > Document Center Repository Setup** – Allows the user to manage the paths for the document repositories in the Document Center.
  - **Office Manager > File Exchange, View/Edit Schedule** – Allows the user to view and delete scheduled export jobs in the File Exchange module from the Office Manager.

Installation

Install Dentrix Enterprise 11.0 on each computer that runs Dentrix Enterprise. This includes terminal servers (servers running Microsoft Terminal Services) and Citrix servers. For help with the download and installation of Dentrix Enterprise 11.0, contact Dentrix Enterprise Customer Support at 1-800-DSCHEIN, option 4.

Important Notes

- To download a copy of the latest Dentrix Enterprise system requirements, visit www.dentrixenterprise.com/support/requirements.
- You should install Dentrix Enterprise at a time that is outside of your regular office hours.

Using the New Features and Enhancements

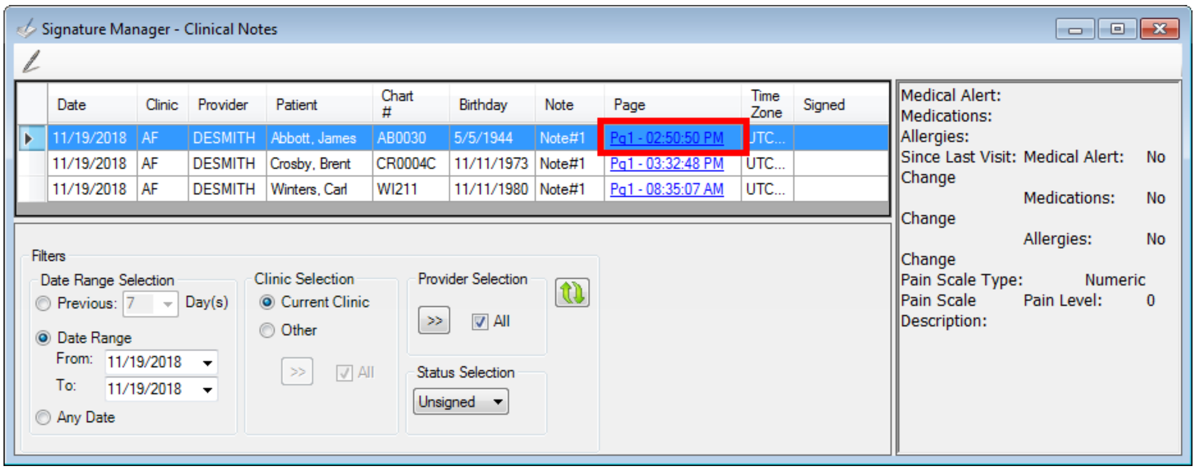
The pages that follow contain instruction about how to use the new features and enhancements of this release.

Editing Clinical Notes from the Signature Manager

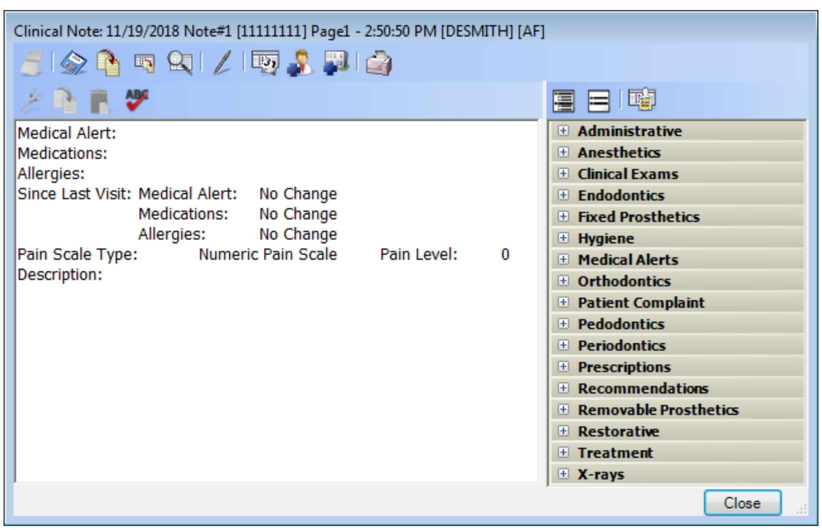
You can now edit or add information to an unsigned clinical note from the Signature Manager. You no longer have to open the corresponding patient's record, open the Clinical Notes module, select the correct note page, make the necessary changes to the note, and then return to the Signature Manager to sign it.

To edit a clinical note from the Signature Manager

1. In the **Signature Manager** dialog box, click the link in the **Page** column of the clinical note that you want to review.



The **Clinical Note** dialog box appears and displays the correct clinical note page.



2. Make the necessary changes.

   Note: You can sign the clinical note page from this window if desired.

3. Click **Close** to save the changes and close the **Clinical Note** dialog box.

   The changes, including the **Signed** status if you signed the note, are now reflected in the Signature Manager.

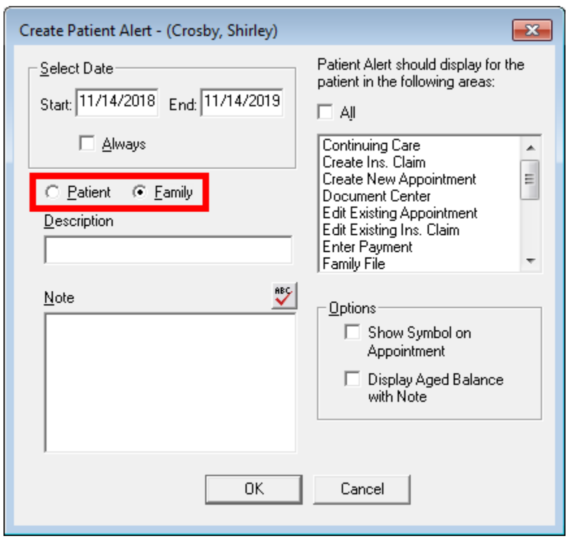
Creating Family Alerts

When creating a patient alert, you can now specify that the alert is for the family. The family alert appears for the patient and any of that patient's family members (as set up in the Family File) when someone accesses the specified areas of Dentrix Enterprise. If a family alert has been set up to have a flag symbol appear on appointments, the symbol appears on appointments for all family members.

To create a family alert

1. With a family member selected in the Family File, click the **Patient Alert** button  on the toolbar.

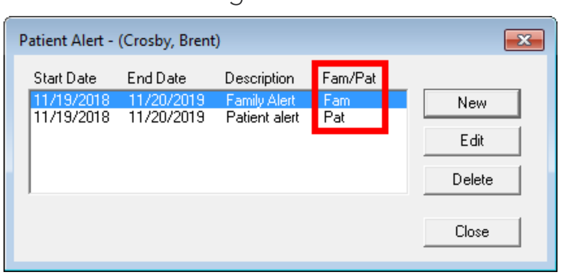
   If the family member does not have any patient alerts, or if the family does not have any family alerts, the **Create Patient Alert** dialog box appears. Otherwise, the **Patient Alert** dialog box appears, and you have to click **New** to open the **Create Patient Alert** dialog box.



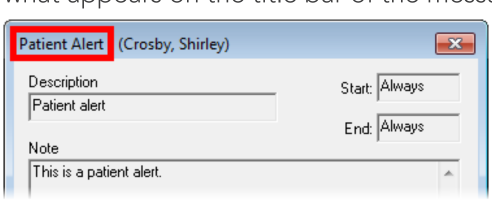
2. There are two new options: **Patient** and **Family**. **Patient** is selected by default. To make this alert appear for all family members, select **Family**.
3. Set up the other options as needed.
4. Click **OK**.

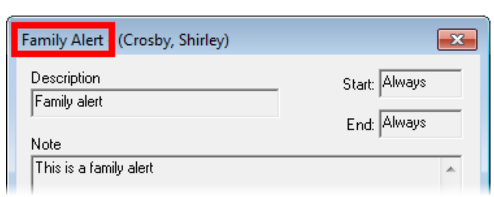
Notes:

- You can view, edit, and delete patient and family alerts in the same place as patient alerts in previous versions. You can manage a family alert with any family member selected. The **Fam/Pat** column in the **Patient Alert** dialog box indicates whether an alert is for the patient or the family.



- When a patient or family alert message appears, you can tell that it is for the patient or the family by what appears on the title bar of the message.





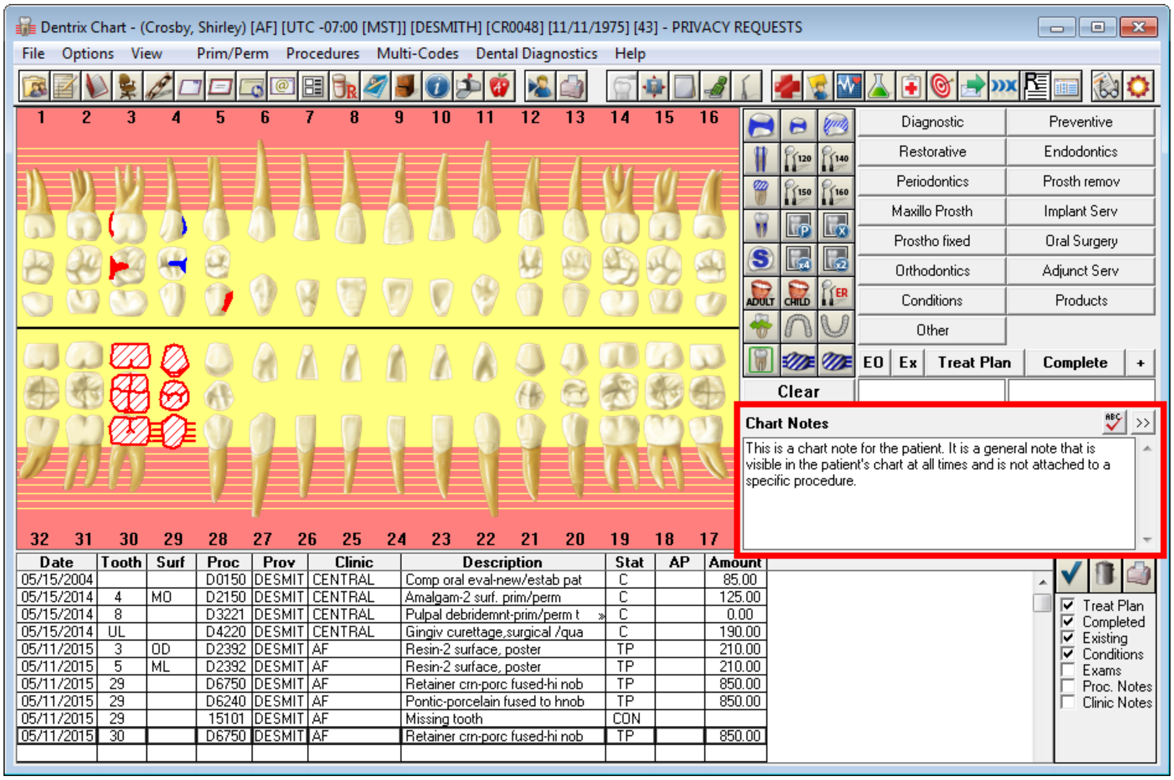
Entering Chart Notes

You can now enter a general note regarding a patient's clinical chart directly in that patient's Chart while performing work on that patient. The note will always be visible to anyone who opens that patient's Chart.

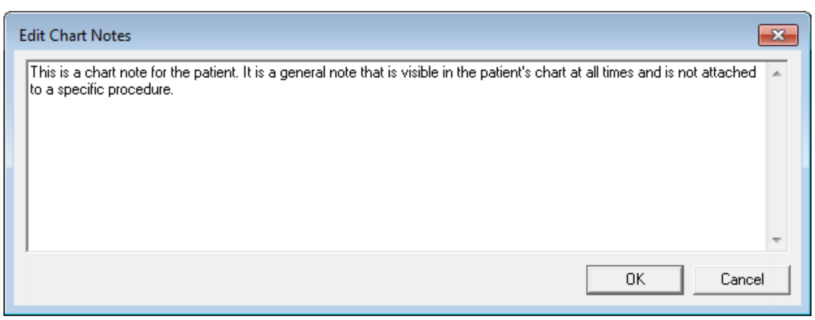
To enter a chart note

With a patient selected in the Patient Chart, do one of the following:

- In the **Chart Notes** box, enter notes for the patient.



- Next to **Chart Notes**, click the **More** button, enter notes in the **Edit Chart Notes** dialog box that appears, and then click **OK**.



Notes:

- The maximum length for a chart note is 8000 characters.
- The chart note is saved automatically when you click **OK** on the **Edit Chart Notes** dialog box, click outside the **Chart Notes** box, or close the patient's Chart.
- To check the spelling of the chart note, click the **Check Spelling** button.
- While viewing that patient's Chart, if the entire text of the chart note is not visible, you can either scroll to read the entire note or click the **More** button to view the entire note at once.

Copying Patients

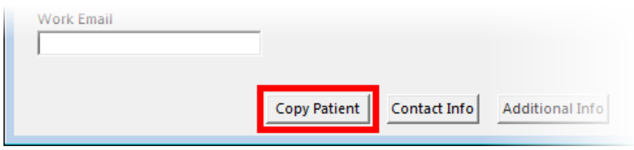
When you copy a patient, the **Patient Information** dialog box is now named "**Patient Copy Information**," and it has been updated to incorporate the changes that have been made to the **Patient Information** dialog box in previous versions of Dentrix Enterprise.

The following data is copied:

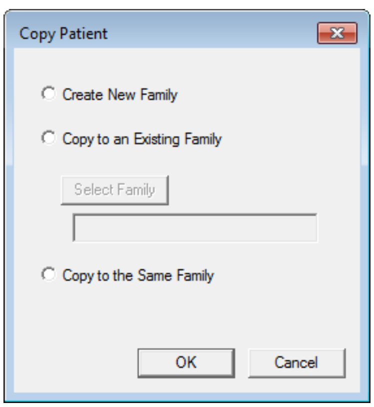
- Personal information (except the Pat Ext ID)
- Demographics
- Contact information
- Addresses
- Chart # (according to the **Character to be Appended to Chart#** setting in the practice defaults)
- Prov1 (according to the **Copy Patient Provider** setting in the practice defaults)
- Clinic (according to the **Copy Patient Clinic** setting in the practice defaults)

To copy a patient

1. In a patient's **Patient Information** dialog box, click **Copy Patient**.

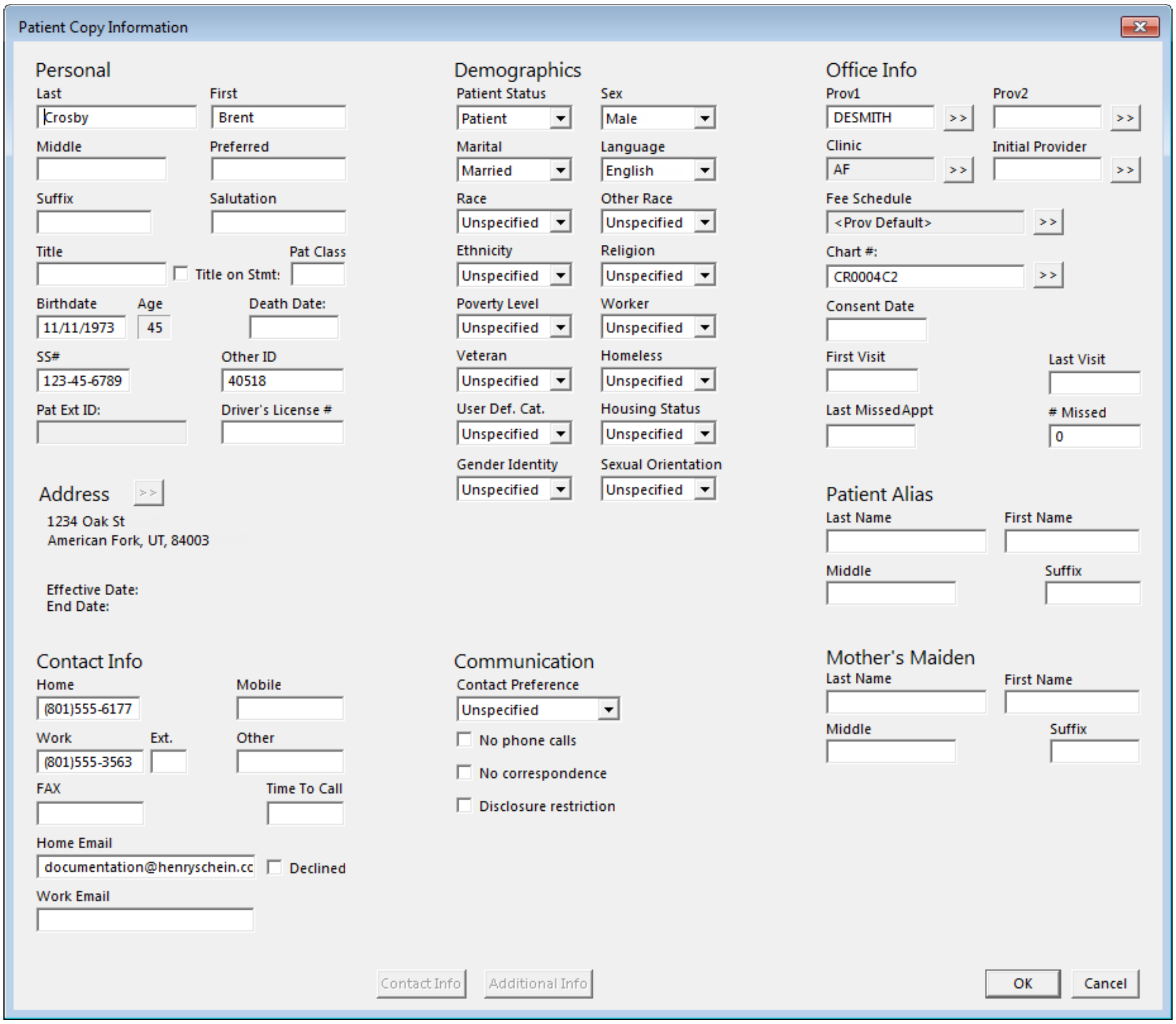


The **Copy Patient** dialog box appears.



2. Select one of the following options:
   - **Create New Family** – To make a new family with the patient as the head of household.
   - **Copy to an Existing Family** – To copy the patient to an existing family other than the current family. Click **Select Family** to search for and select a patient in the desired family.
   - **Copy to the Same Family** – To copy the patient to the current family.
3. Click **OK**.

   The **Patient Copy Information** dialog box appears.

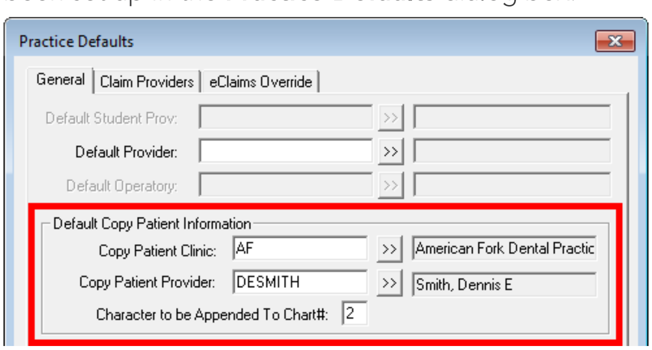


Note: The **Address** >>, **Contact Info**, and **Additional Info** buttons are not available.

4. Change any information as needed, and then click **OK**.

Important:

- You can use the copy patient feature only if the **Default Copy Patient Information** options have been set up in the **Practice Defaults** dialog box.



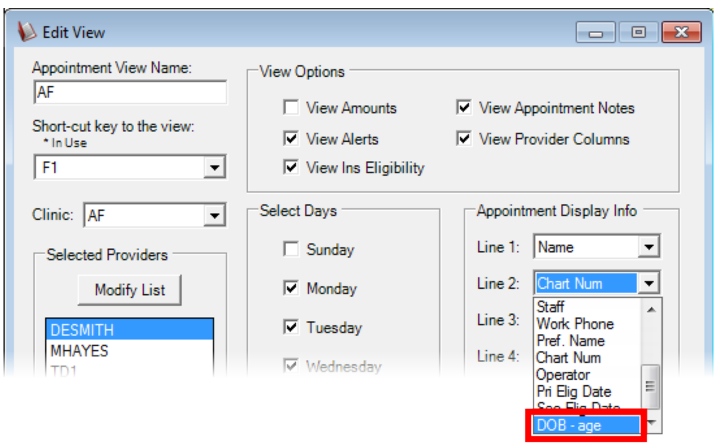
- Also, you can use the copy patient feature only if the global settings are configured as follows:
  - Allow the editing of patient extra information.
  - Allow the editing of patient contact information.
  - Use Other Id for the Medicaid/Other field.

- Do not require Social Security Numbers.
- Do not use HL7integration with Dentrix Enterprise.
- Allow duplicate Social Security Numbers with the copy patient feature.
- Do not check ZIP Codes.
- Do not use Fast Healthcare Interoperability Resources (FHIR) integration with Dentrix Enterprise.
- Do not use file exchange services.

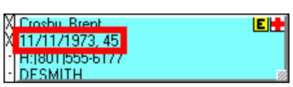
- You can copy a patient only once.
- The copied patient is not linked to or synchronized with the original patient. Any changes to the patient information must be done in both patients' records. It is possible to inadvertently enter data, such as procedures, in the incorrect patient's record due to not being able to tell the difference between the duplicate patients. This may affect some reports (data from both patients appear, or the patient is counted twice), and insurance issues might occur. However, when you change an address for a patient, if there is another patient (in the current family or in another family) with that address, a message appears and asks if you want to update the address for only the current patient or for all applicable patients.

Viewing Birth Dates and Ages on Appointments

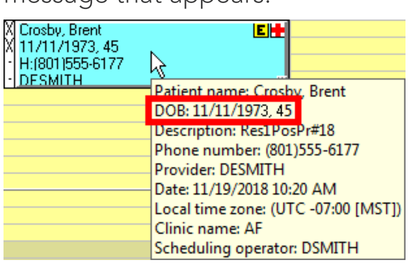
When setting up a view in the Appointment Book, you can now have the date of birth and age appear as one of the line items on each patient's appointment.



With the **DOB - age** option selected for a line, an appointment displays the birth date and age of the corresponding patient on that line.

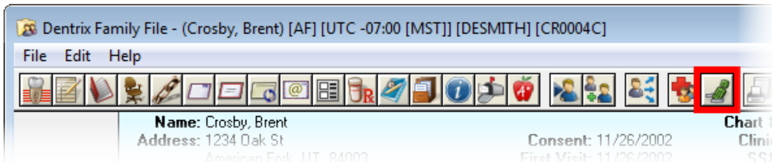


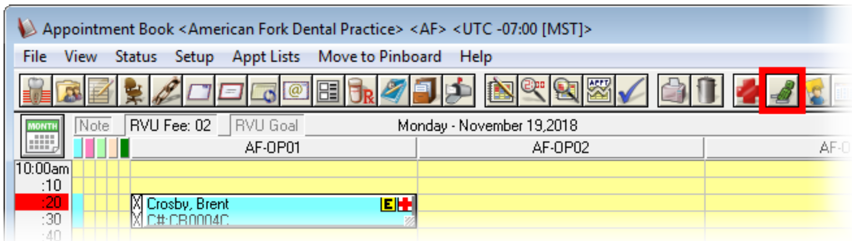
Note: Whether or not **DOB - age** is selected as one of the lines for appointments, when you position your pointer over an appointment, the corresponding patient's birth date and age appear on the pop-up message that appears.



Opening the Treatment Planner

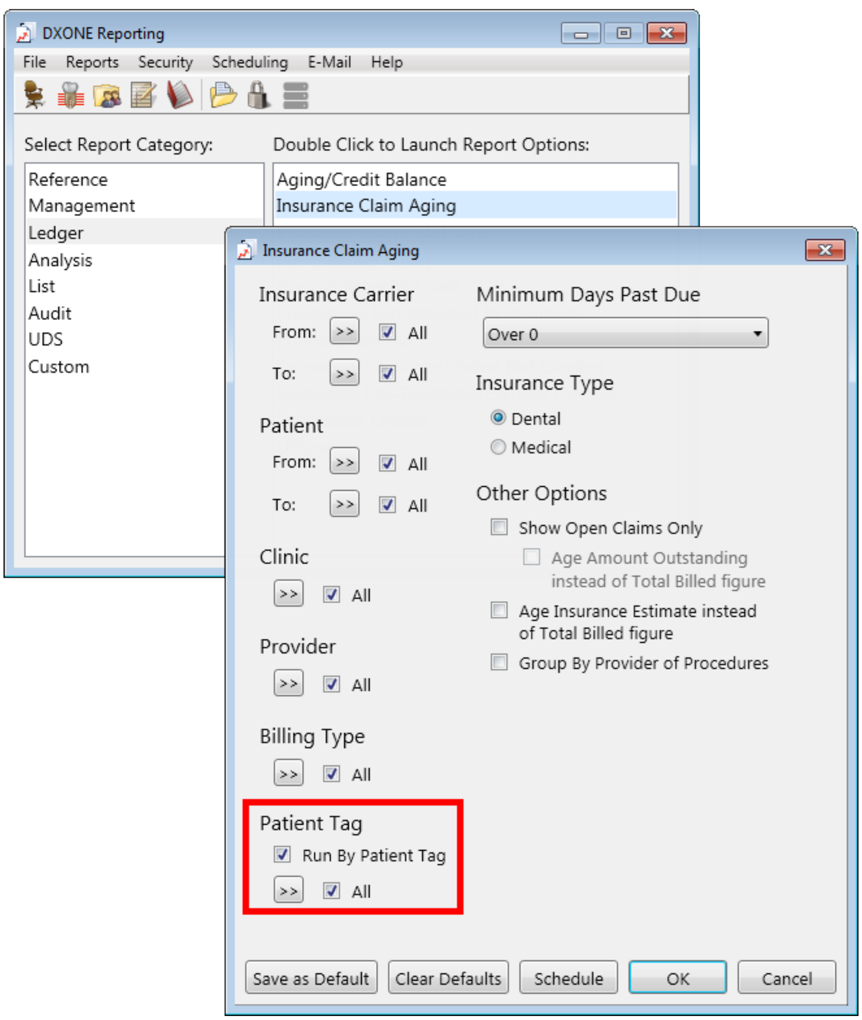
You can now open the Treatment Planner from the Family File or the Appointment Book.





DXOne Reporting Module and Scheduling Service

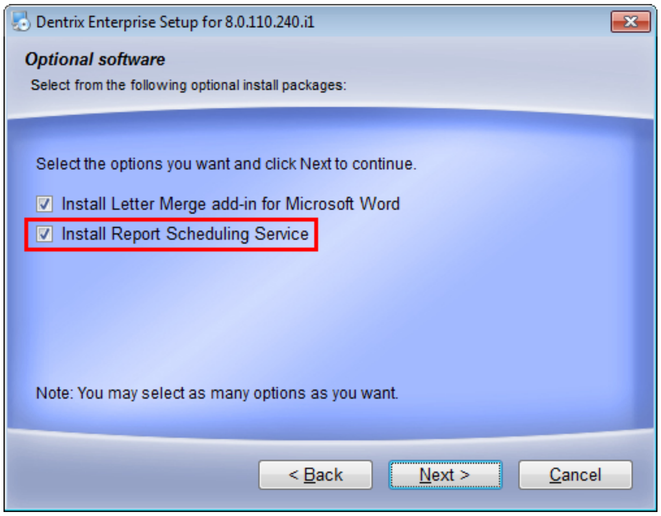
This module has been completely redesigned. It has an updated look. Additional report filters are available on some reports, and you can now filter nearly every report by patient tags.



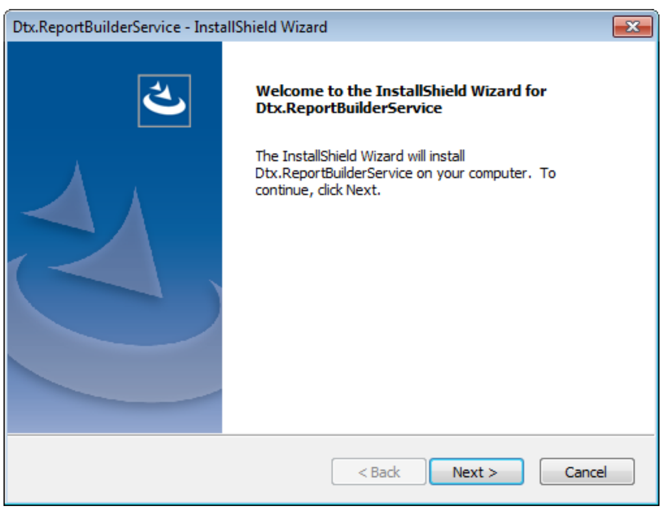
Also, there is a new method of installing a service on a server that handles scheduled reports and a new way to configure the report server on a computer from which you schedule report jobs.

To install and configure the report scheduling service

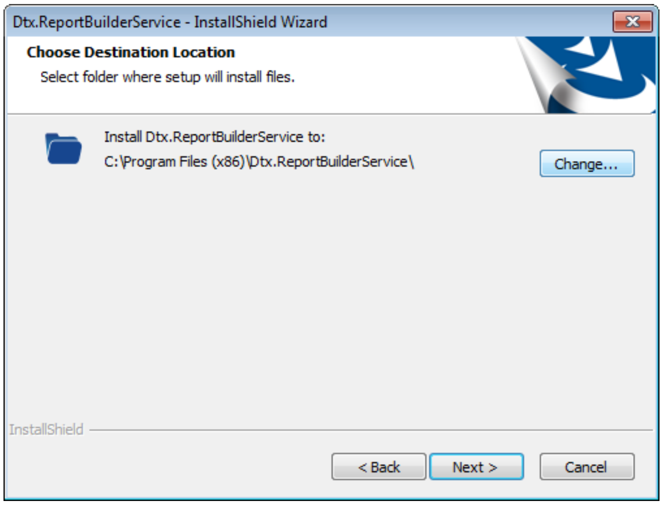
1. During the installation of Dentrix Enterprise on a computer that you want to use to handle scheduled reports, when the **Optional Software** screen appears, select the **Install Report Scheduling Service** check box.



2. Click **Next** and then **Next** to continue with the Dentrix Enterprise installation.
3. When the report scheduling service installation starts, click **Next**.

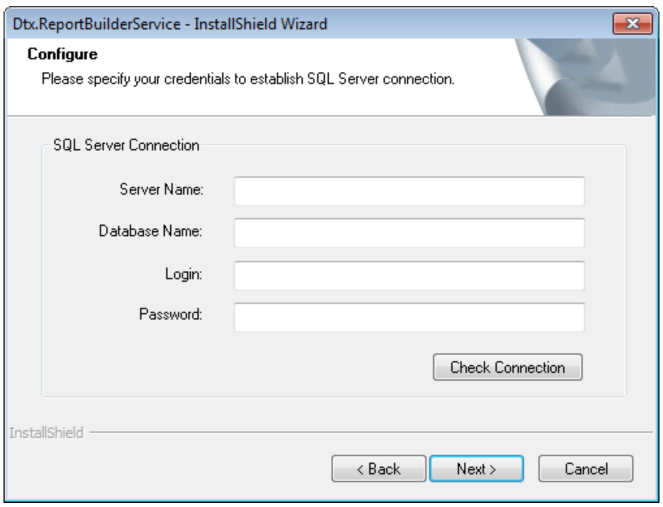


The **Choose Destination Location** screen appears.



4. Either leave the default location selected, or click **Change** to select a different location where you want to install the service.
5. Click **Next**.

   The **Configure** screen appears.

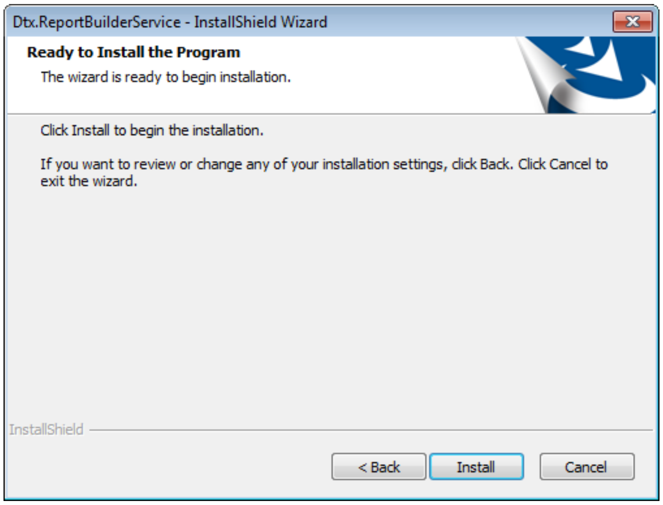


6. Enter the following connection details:
   - **Server Name** – The name of the database server, a backslash (\), and then the name of the Microsoft SQL Server instance that houses your Dentrix database.
   - **Database Name** – Dentrix is the default name of the database, but it may be different if it has been customized for your installation.
   - **Login** – The user name of a super admin user, such as Enterprise or SA.
   - **Password** – The user's password.
7. Click **Check Connection**.
8. On the message that appears and states that the connection was successful, click **OK**.

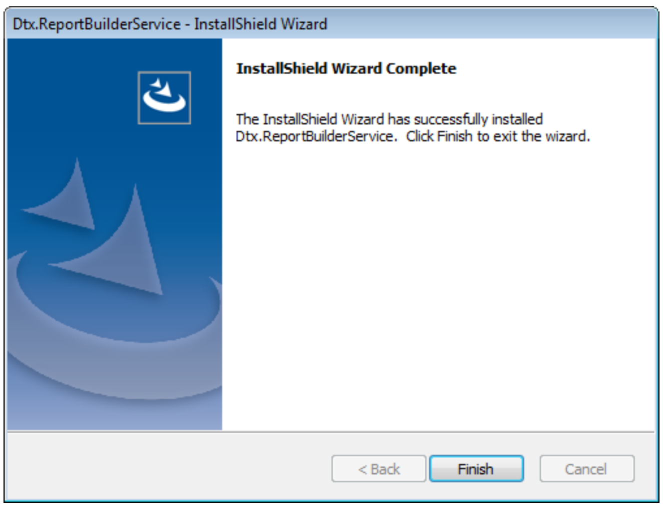
   Note: You can proceed with the installation of the service only if the connection test is successful. If you do not click **Check Connection**, the test will be performed automatically when you click **Next**.

9. Click **Next**.

   The **Ready to Install the Program** screen appears.

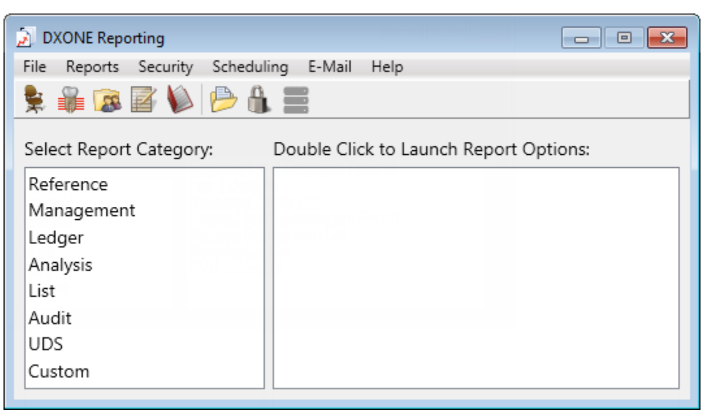


When the installation of the service is finished, the **Complete** screen appears.



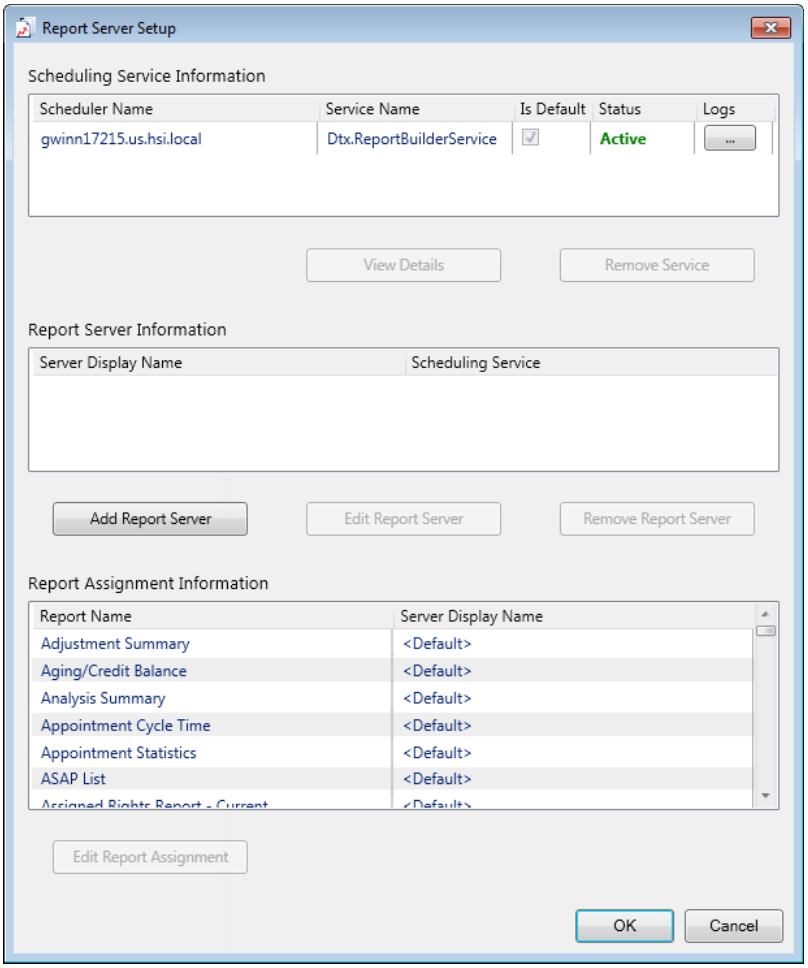
10. Click **Finish**.
11. Complete the installation of any third-party programs as applicable, and then click **Finish** to finish to Dentrix Enterprise installation.
12. Open Dentrix Enterprise.
13. In the Office Manager, click the **DXOne Reports** button  on the toolbar.

    The **DXOne Reporting** window opens.



14. Click the **Report Server** button  on the toolbar.

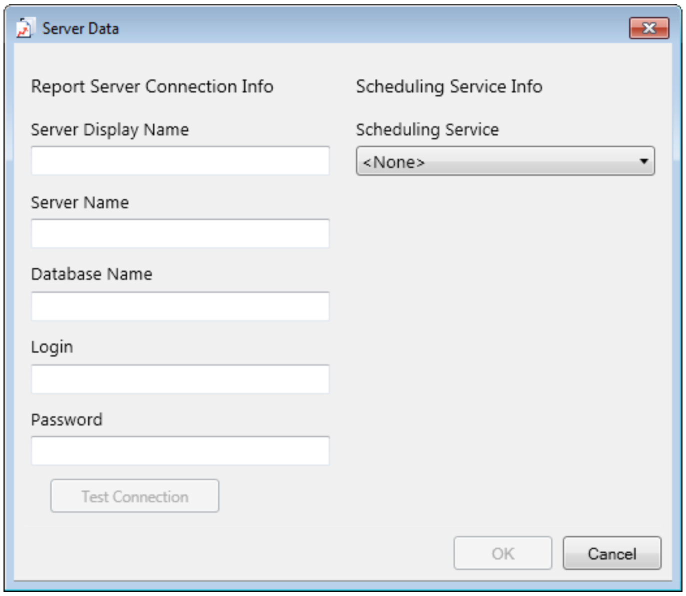
The **Report Server Setup** dialog box appears.



The scheduling services that are installed on any computer on your office's network appear at the top. You must have at least one that is marked as the default, and any service that you want to use must have an Active status.

15. To add a report server that will handle the generation of scheduled reports that were initiated by a specified scheduling service, click **Add Report Server**.

    The **Server Data** dialog box appears.



16. Enter the following connection details under **Report Server Connection Info**:

- **Server Display Name** – The name of the server as you want it to appear on the list of report servers.
- **Server Name** – The name of the database server, a backslash (\), and then the name of the Microsoft SQL Server instance that houses your Dentrix database.
- **Database Name** – Dentrix is the default name of the database, but it may be different if it has been customized for your installation.
- **Login** – The user name of a super admin user, such as Enterprise or SA.
- **Password** – The user's password.

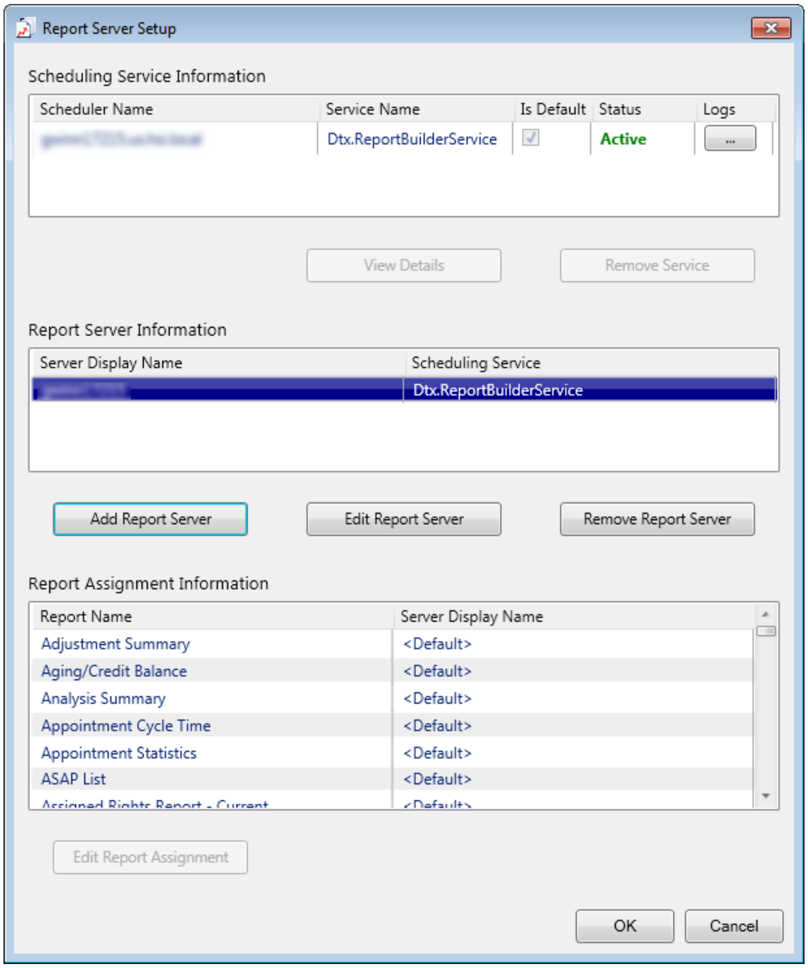
17. Click **Test Connection**.

18. On the message that appears and states that the connection was successful, click **OK**.

19 Select a **Scheduling Service**.

20. Click **OK**.

Note: To add other report servers, repeat steps 15–20 as needed.



21. If you do not want to use the default report server (the first report server in the list) for a report, under **Report Assignment Information**, select that report, and then click **Edit Report Assignment**. Select a different server, and then click **OK**. Repeat this step as needed to change the report server assigned to other reports.
22. Click **OK**.

You can now schedule reports as needed.

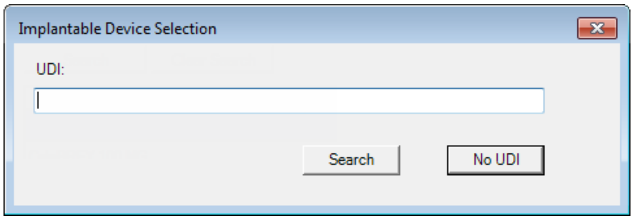
Adding Implantable Devices

You can now add implantable devices to a patient's medical alerts. There is a new section in the **Medical Alerts** window that displays those devices.

To add implantable devices

1. In the **Medical Alerts** dialog box, click the **New Medical Alert** button, and then click **Implantable device** on the menu.

   The **Implantable Device Selection** dialog box appears.

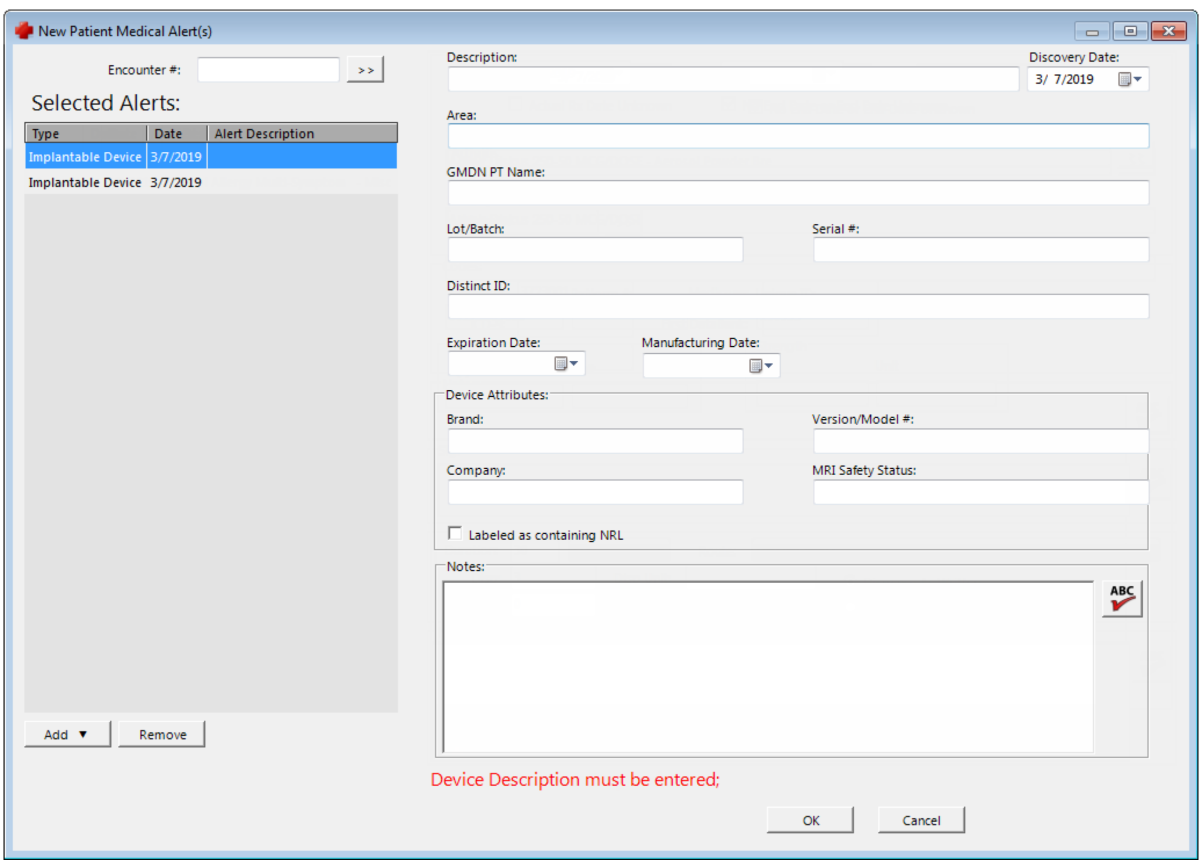


2. Do one of the following:
   - If you know the Unique Device Identification (UDI) of the device, enter it in the **UDI** box, and then click **Search**. Dentrix Enterprise searches the public, online Global Unique Device Identification Database (GUDID), which is maintained by the Food and Drug Administration (FDA).

     Note: Alternatively, Dentrix Enterprise can insert the UDI if you scan the device's barcode with a barcode scanner.

   - If you do not know the UDI, click **No UDI**.

   The **New Patient Medical Alert(s)** dialog box displays an implantable device under **Selected Alerts**.



Notes:

- To add other implantable devices, click the applicable option on the **Add** button menu, and then repeat step 2. Similarly, in addition to implantable devices, you can add other types of medical alerts (problems, medications, and allergies) by selecting the corresponding option on the **Add** menu.
- To remove an implantable device or another type of medical alert, under **Selected Alerts**, select that alert, and then click **Remove**.

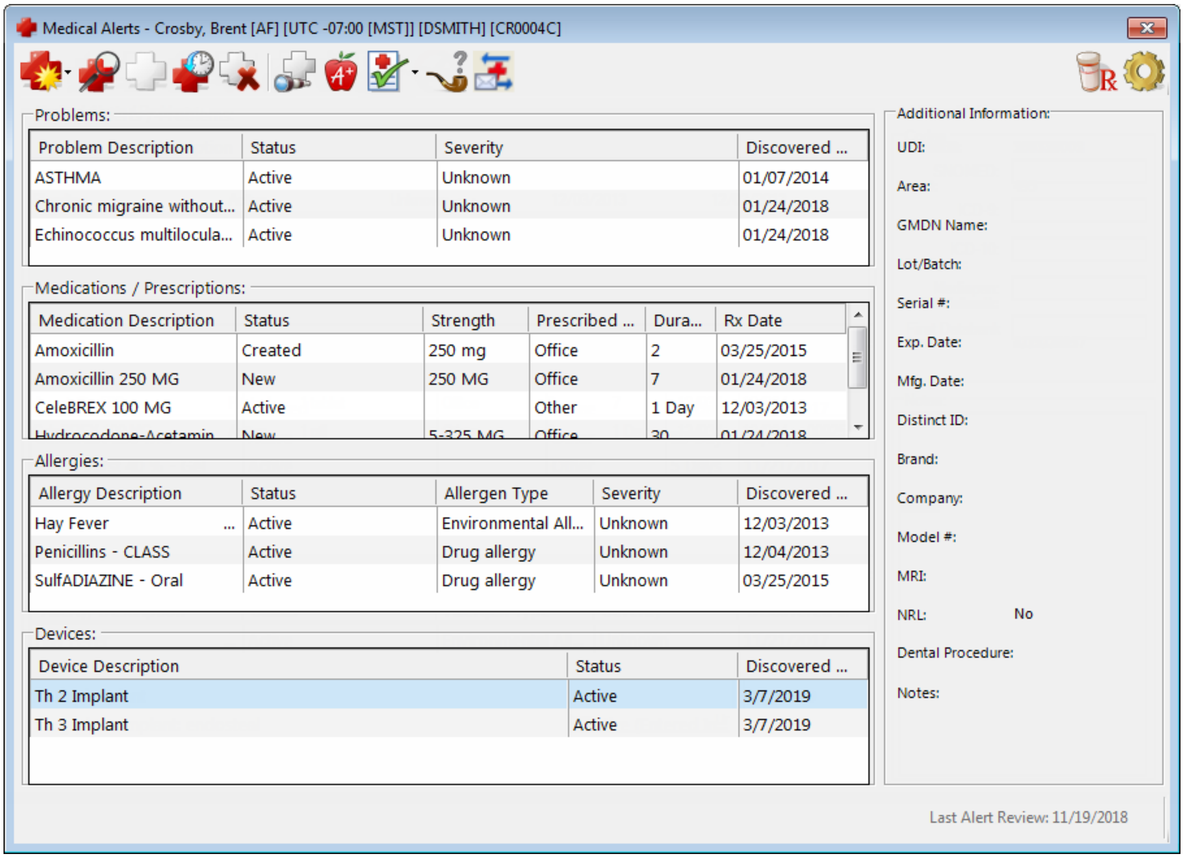
3. For each implantable device under **Selected Alerts**, select the device (if not already selected), and then set up the following options (except those that are already populated with data from the GUDID if the device was found in step 2):
    - **Description** – Enter a brief description of the device as you want it to appear in the **Medical Alerts** dialog box.
    - **Discovery Date** – Enter the date that you found out about the device. By default, the current date is entered.
    - **Area** – Enter the area where the device is implanted.
    - **GMDN PT Name** – If known, enter the Global Medical Device Nomenclature (GMDN) Preferred Term (PT) name of the device.
    - **Lot/Batch** – If known, enter the lot or batch number of the device.
    - **Serial #** – If known, enter the serial number of the device.
    - **Distinct ID** – If known, enter the catalog reference number of the device.
    - **Expiration Date** – If known, enter the expiration date of the device.
    - **Manufacturing Date** – If known, enter the date that the device was made.
    - **Device Attributes**:
        - **Brand** – If known, enter the brand name of the device.
        - **Version/Model #** – If known, enter the version or model number of the device.
        - **Company** – If known, enter the name of the company who made the device.
        - **MRI Safety Status** – If known, enter the safety rating of the device for use in or near a Magnetic Resonance Imaging (MRI) environment.
        - **Labeled as containing NRL** – If known, select or clear the check box to indicate if the device is labeled as containing natural rubber latex (NRL).
    - **Notes** – Enter any notes regarding the implantable device. You can click the **Check Spelling** button (this button is available only if a certain preference setting has been enabled) to check the spelling of the note.
4. Click **OK**.

Inactivating Implantable Devices

You can inactivate a device and specify a reason for doing so.

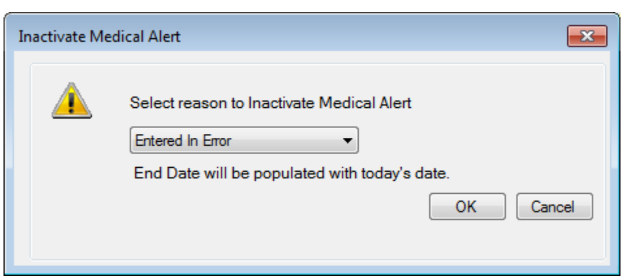
To inactivate an implantable device

1. In the **Medical Alerts** dialog box, select a device in the **Devices** list.



2. Click the **Inactivate Alert** button .

   The **Inactivate Medical Alert** dialog box appears.



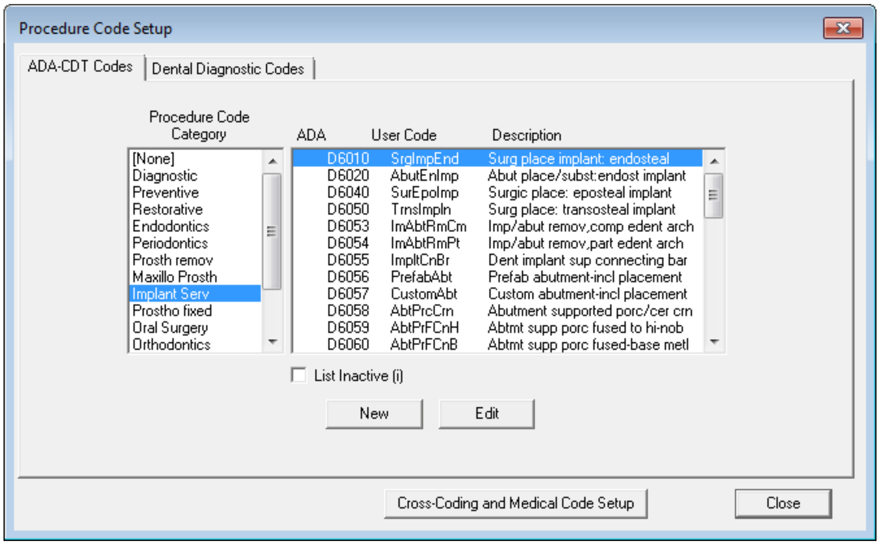
3. Select the reason that you are inactivating the device.
4. Click **OK**.

Customizing Procedure Codes for Implantable Devices

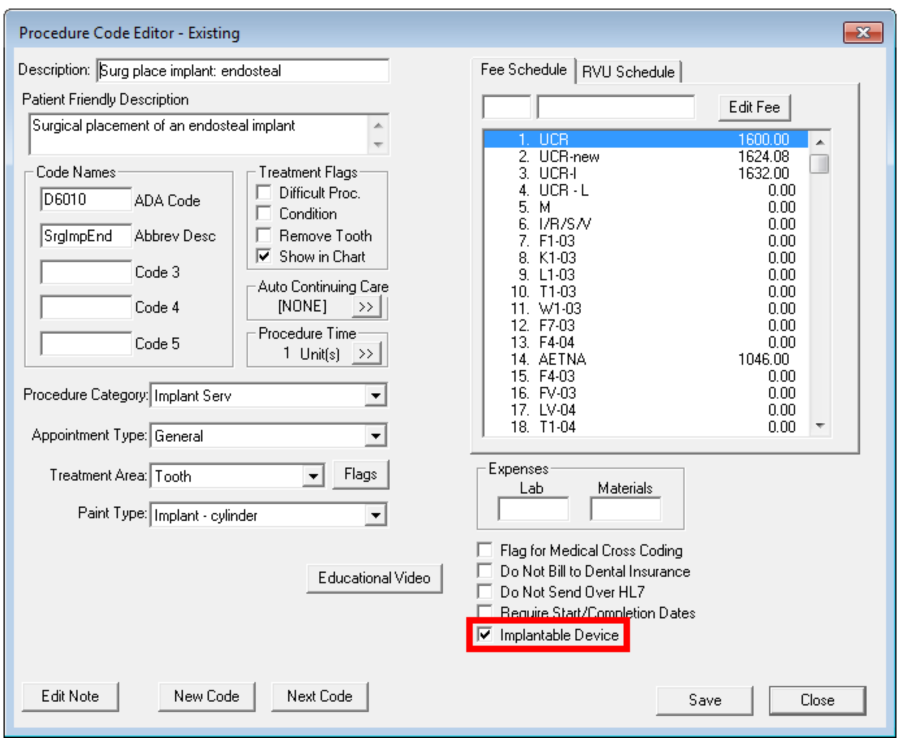
You can now flag a procedure as being for an implantable device.

To customize a procedure code

1. In the **Procedure Code Setup** dialog box, select a **Procedure Code Category**, and then double-click a procedure code in the list on the right.



The **Procedure Code Editor - Existing** dialog box appears.



2. Select the **Implantable Device** check box.
3. Click **Save**.

Attaching Implantable Devices to Treatment-planned Procedures

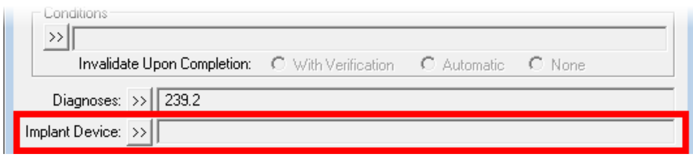
When you treatment plan a procedure that has been flagged for use with an implantable device, you can attach a device to the procedure by editing it.

To attach an implantable device to a treatment-planned procedure

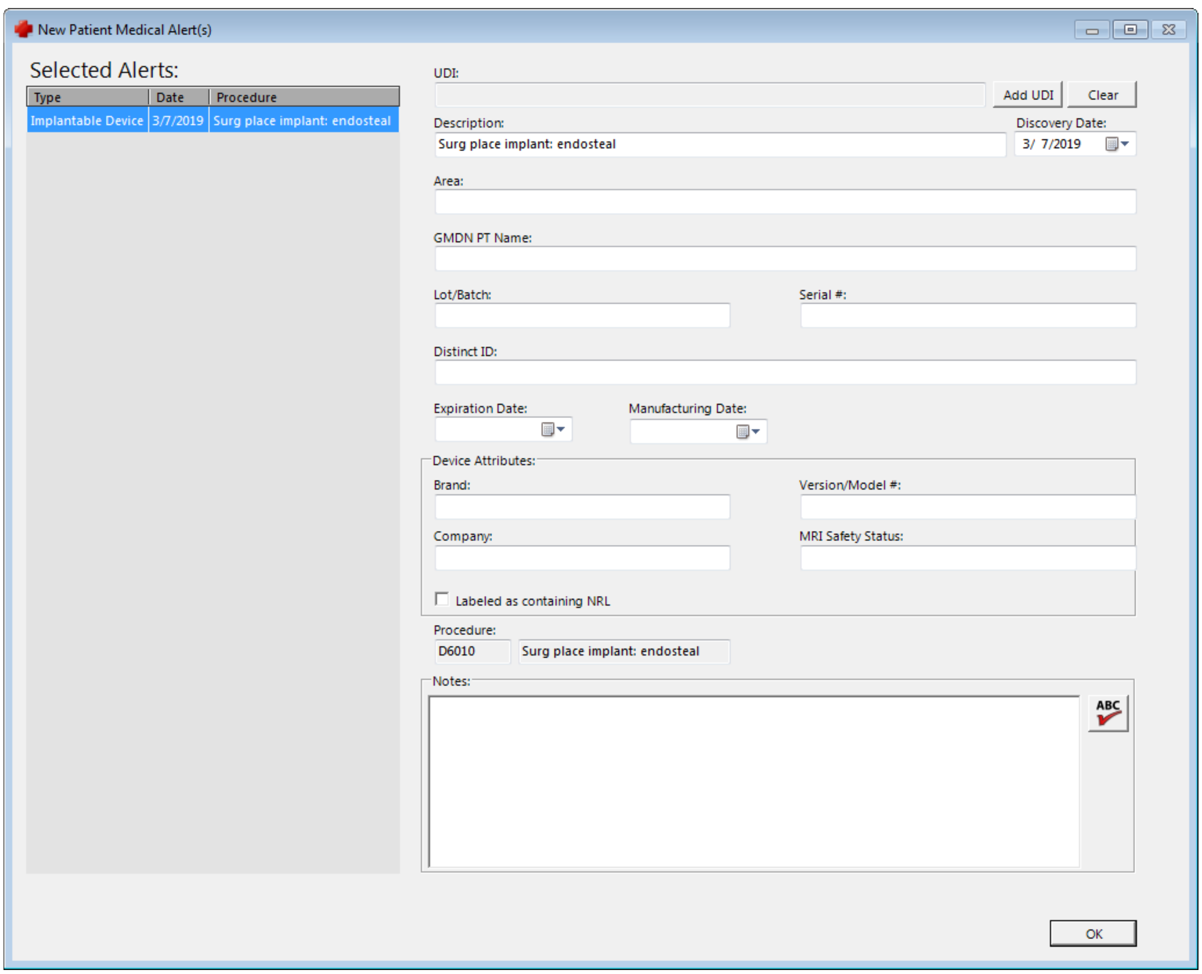
1. With a patient selected in the Patient Chart, from the Progress Notes panel, double-click a treatment-planned procedure.

   The **Edit or Delete Procedure** dialog box appears.

2. Click the **Implant Device** search button .

   The **New Patient Medical Alert(s)** dialog box appears.

3. If you know the UDI of the device, click **Add UDI** to search for the implantable device in the public, online Global Unique Device Identification Database (GUDID), which is maintained by the Food and Drug Administration (FDA). Alternatively, Dentrix Enterprise can insert the UDI if you scan the device’s barcode with a barcode scanner.

Note: You do not change any of the other options in the **New Patient Medical Alert(s)** dialog box that are already populated with data from the GUDID if the device is found.

4. Enter a description, and set up any other options (if known) as needed.
5. Click **OK** to attach the device to the procedure.

   The description specified appears in the box.

6. Click **OK** to save the change to the procedure.

Attaching Implantable Devices to Completed Procedures

Alternatively, you can wait to attach the device until you complete the procedure (when you post a completed procedure for an implantable device, Dentrix Enterprise automatically prompts you to attach a device).

To attach an implantable device to a completed procedure

1. With a patient selected in the Patient Chart, select a treatment-planned procedure, and then click the **Set Complete** button.

   If the procedure has been set up to be for an implantable device, the **New Patient Medical Alert(s)** dialog box appears.
2. If you know the UDI of the device, click **Add UDI** to search for the implantable device in the public, online Global Unique Device Identification Database (GUDID), which is maintained by the Food and Drug Administration (FDA). Alternatively, Dentrix Enterprise can insert the UDI if you scan the device's barcode with a barcode scanner.

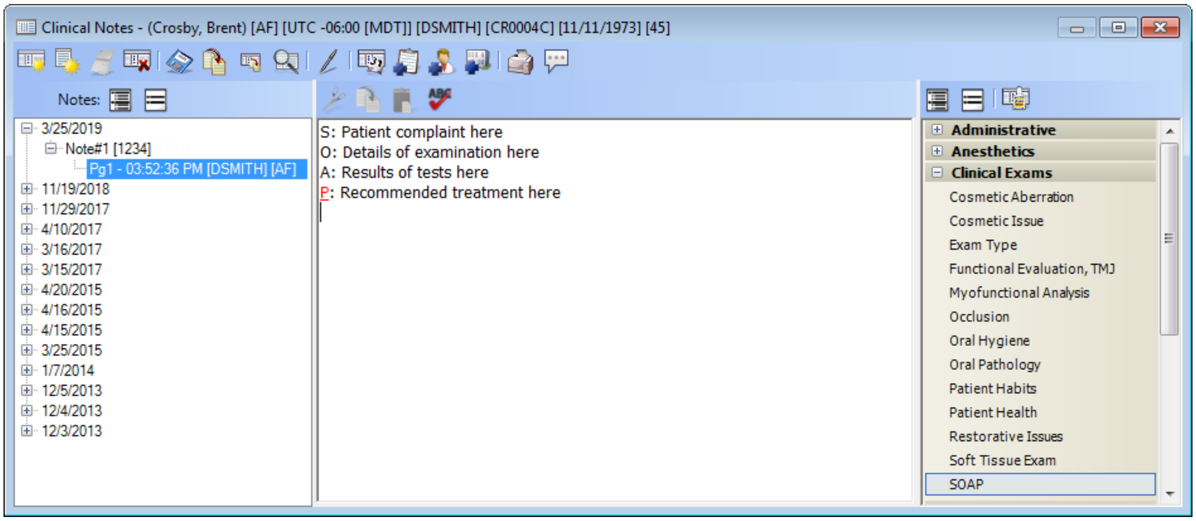
   Note: You do not change any of the other options in the **New Patient Medical Alert(s)** dialog box that are already populated with data from the GUDID if the device is found.
3. Enter a description, and set up any other options (if known) as needed.
4. Click **OK** to attach the device to the procedure.

Viewing attached clinical note prompts

You can view the information in a clinical note that was entered using a template with prompts. You can still edit other parts of the clinical note as in previous versions of Dentrix Enterprise.

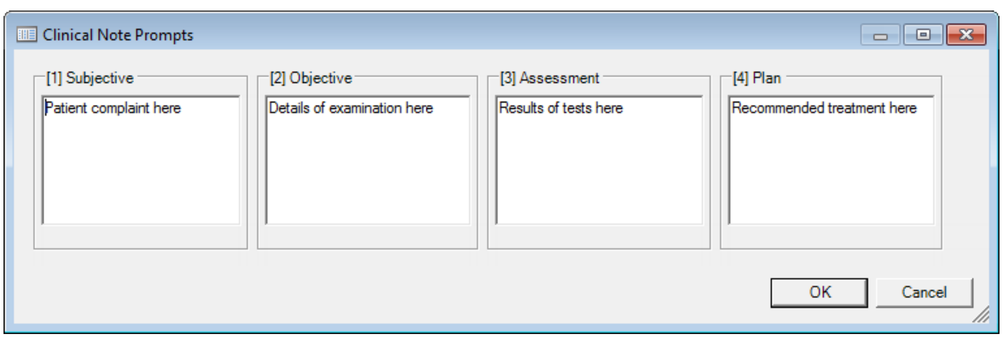
To view a clinical note prompt

1. In the **Clinical Notes** window, select the page of a note.



2. Click the new **View Prompts** button  on the toolbar.

   The **Clinical Note Prompts** dialog box appears.

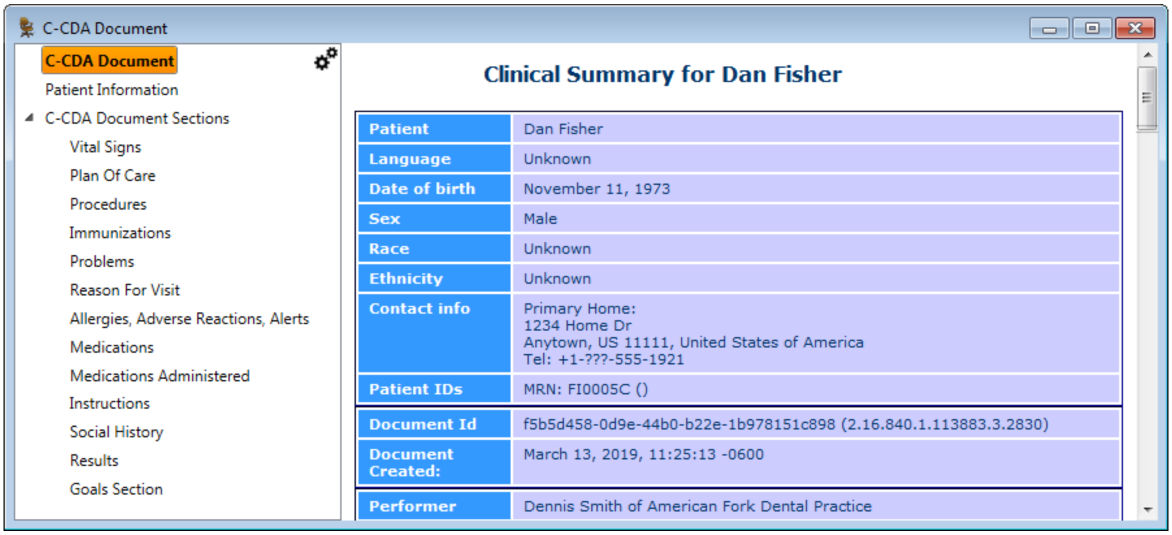


   Note: If a prompt is named “Assessment” or “Plan,” the information entered can appear in exported C-CDA documents in an “Assessments” or a “Planned Care” section.

3. Click **OK**.

Exporting C-CDA Documents

When you export a patient's C-CDA document (see "Exporting from the Patient Health Exchange" on page 35), the patient's implantable devices, completed procedures, treatment-planned procedures, and dental conditions are now included. If the patient's record has a clinical note that was created using a template (such as for documenting SOAP) that includes prompts for an assessment and planned care, that data is now included on the exported C-CDA document.



Importing C-CDA Documents

When you import a C-CDA document (from an individual's patient health exchange or from the general patient health exchange inbox) that includes the patient's completed procedures, treatment-planned procedures, and dental conditions, you can now reconcile that data with procedures and conditions that are already in the patient's record.

Also, if the document includes the patient's implantable devices, you can view those.

To import a C-CDA document

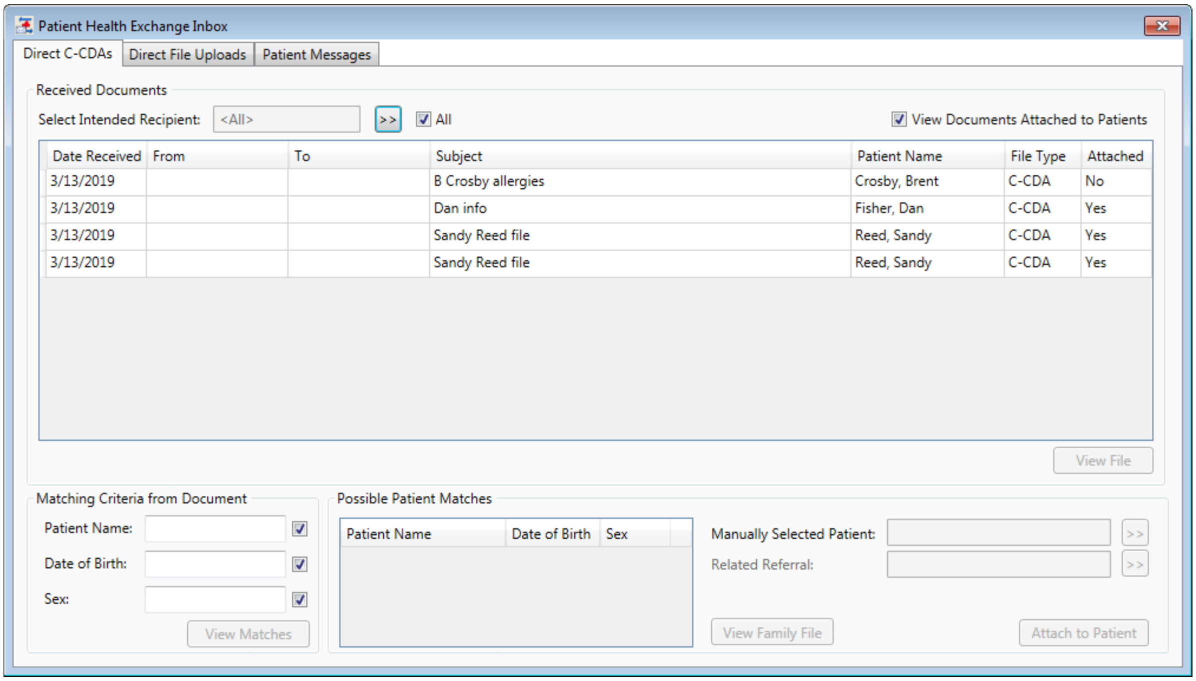
1. In the Office Manager, from the **File** menu, click **Patient Health Exchange Inbox**.

   A progress indicator appears, followed by a completion message.

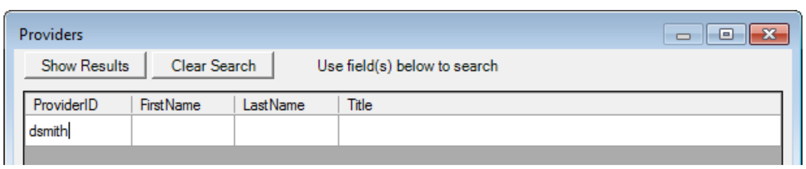
   

2. Click **Close**.

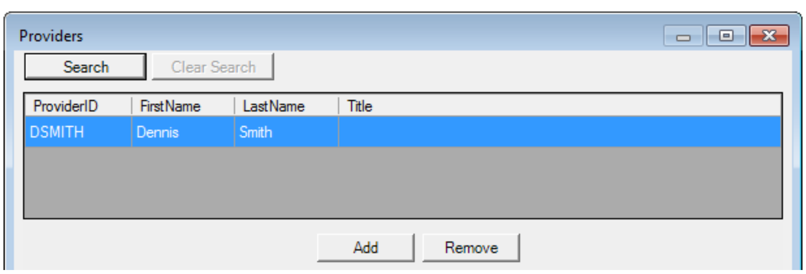
   The **Patient Health Exchange Inbox** dialog box appears. The **Direct C-CDAs** tab is selected by default.



3. Filter the **Received Documents** list as needed:
   - To view messages sent to all providers, select the **All** check box. Or, to view messages sent to a specific provider, click the **Select Intended Recipient** search button >> to select that provider by doing the following:
     a. In the **Providers** dialog box, enter your search criteria in the **ProviderID**, **FirstName**, **LastName**, and/or **Title** boxes (or leave all the boxes blank to search for all providers), and then click **Show Results**.

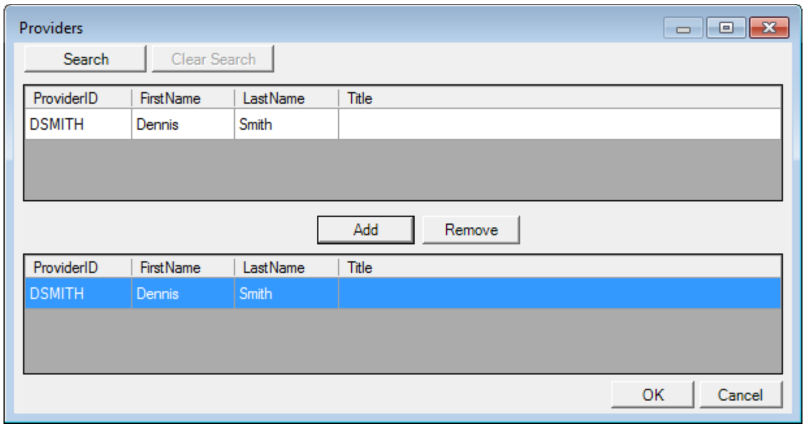


The matching providers appear in the upper list.



     b. Select the correct provider, and then click **Add**.

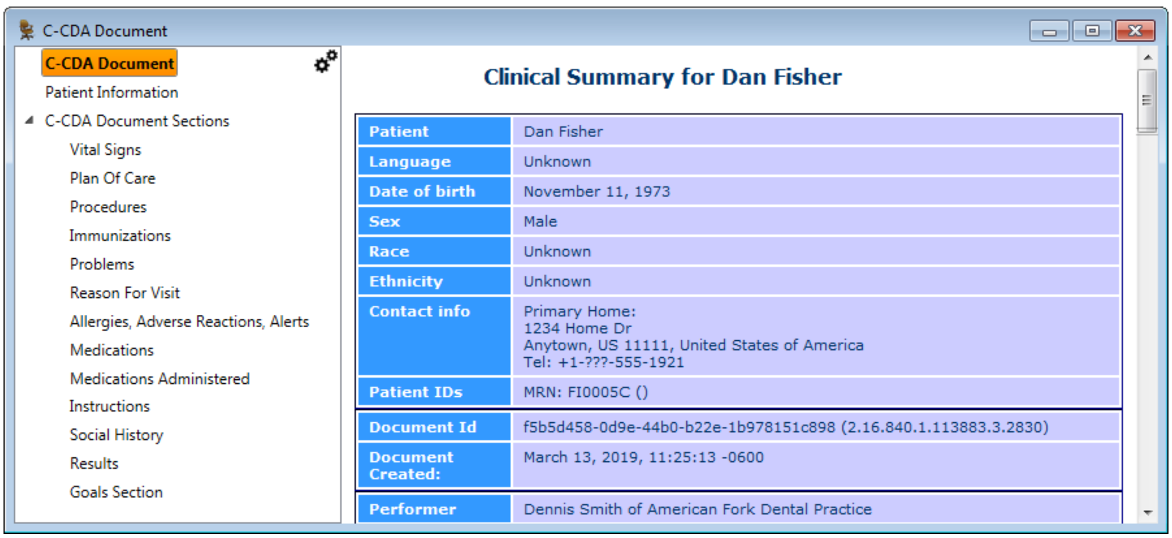
     The provider now appears in the lower list.



c. Click **OK**.

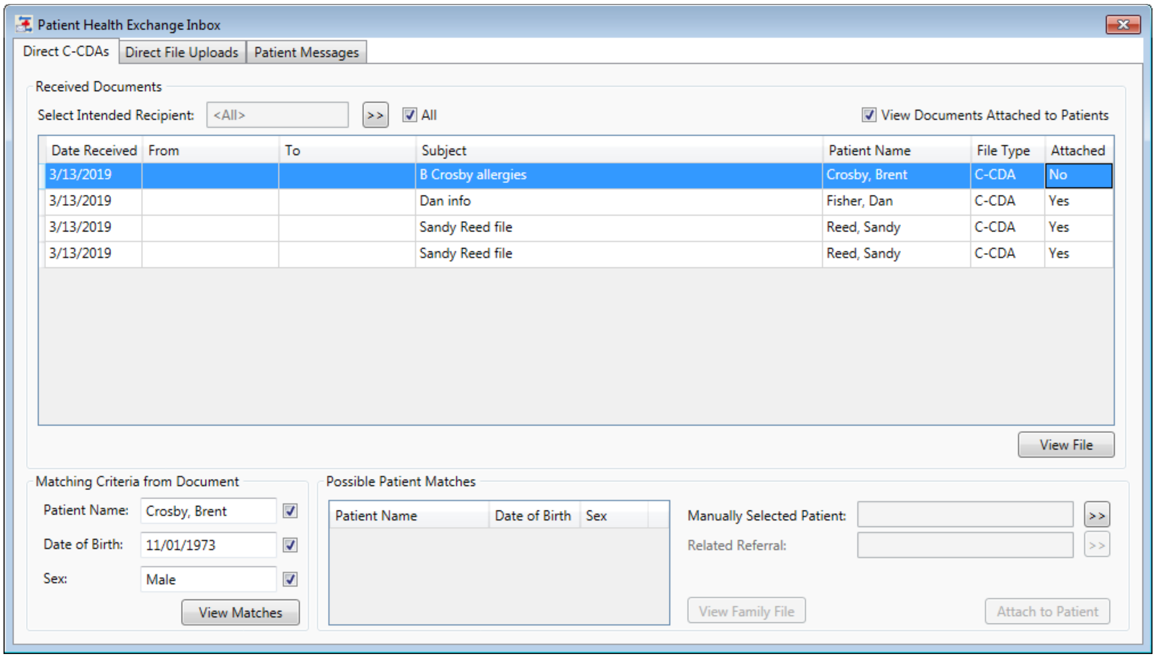
- To view messages with documents that are already attached to the correct patients, select the **View Documents Attached to Patients** check box. Messages with documents that are not attached to patients still appear in the list.

4. To view the document attached to a message, select the message, and then click **View File**. When you are finished viewing the document, close the **C-CDA Document** dialog box.



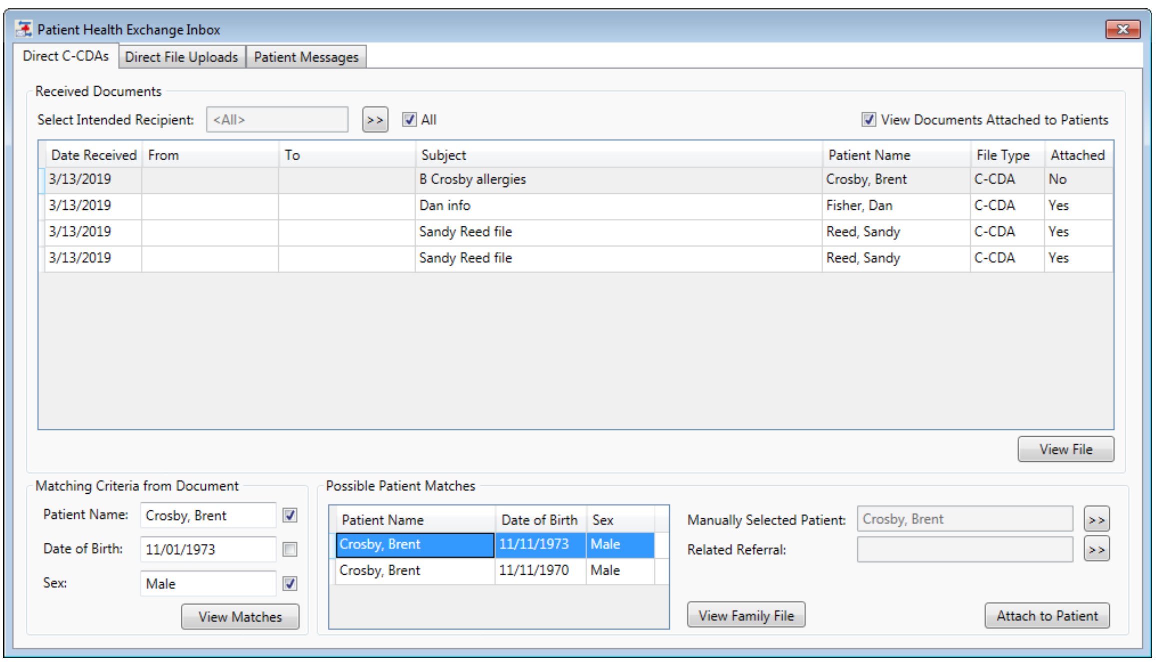
5. To find a patient in Dentrix Enterprise that matches the patient whose information is on the document attached to a message, do the following:

   a. Select the message (if not already selected).



b. Under **Matching Criteria from Document**, select the criteria that must be met when looking for possible matches (name, birth date, and/or sex), and then click **View Matches**.

The **Possible Patient Matches** appear.



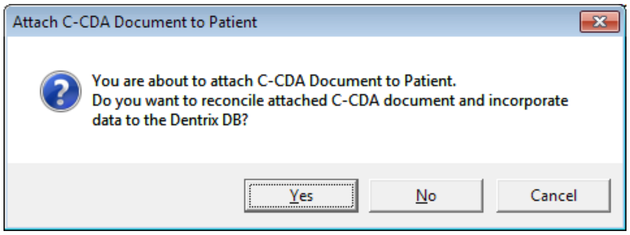
c. Under **Possible Patient Matches**, select the patient to whom you want to attach the received document. If there are no matches, click the **Manually Selected Patient** search button >> to select the correct patient.

6. With the correct patient selected, to associate a referral (by) with the received document, click the **Related Referral** search button >> to select the referral.

7. To open the selected patient's Family File record, click **View Family File**.

8. To attach the received document to the selected patient's record, click **Attach to Patient**; otherwise, ignore the steps that follow.

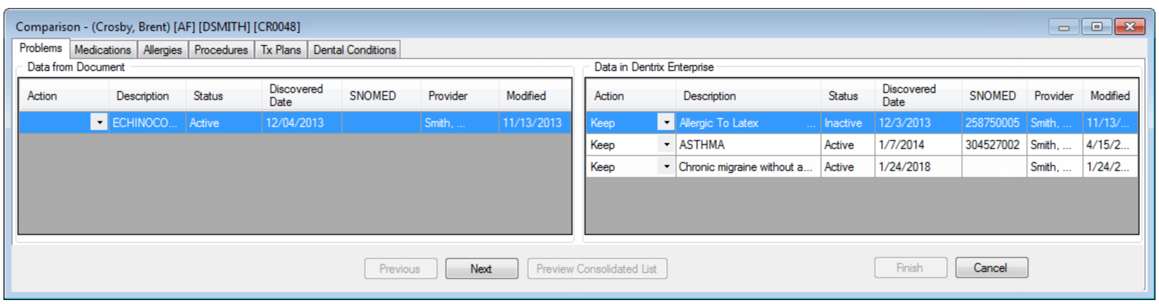
   A messages appears.



9. Do one of the following:
   - To attach the document to the patient's record and choose the data that you want to incorporate into the patient's record, click **Yes**. Proceed to the next step.
   - To attach the document to the patient's record without choosing the data that you want to incorporate into the patient's record, click **No**. Ignore the steps that follow.
   - To cancel the operation and return to the **Patient Health Exchange Inbox** dialog box, click **Cancel**. Go back to any step prior to step 8.

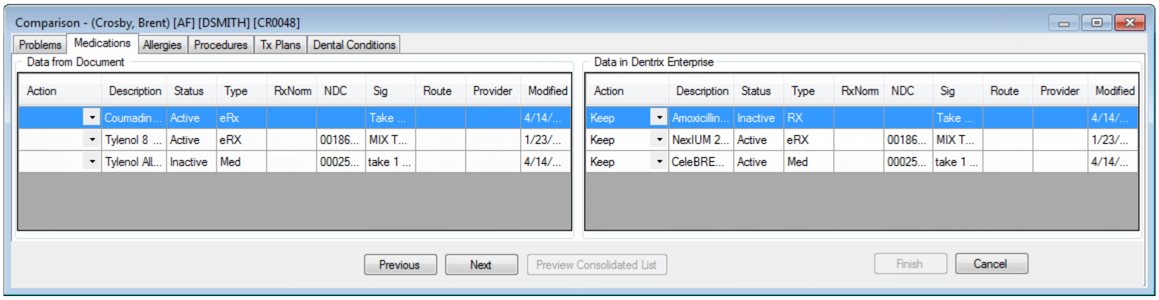
   If you clicked **Yes**, the **Comparison** dialog box appears with the **Problems** tab selected; otherwise, ignore the steps that follow.

10. Reconcile data on the document with data already in the patient's record in Dentrix Enterprise. You can click each tab or click **Previous** or **Next** to navigate between each tab. Depending on the C-CDA document, all or some of the following tabs may be available:
    - **Problems**



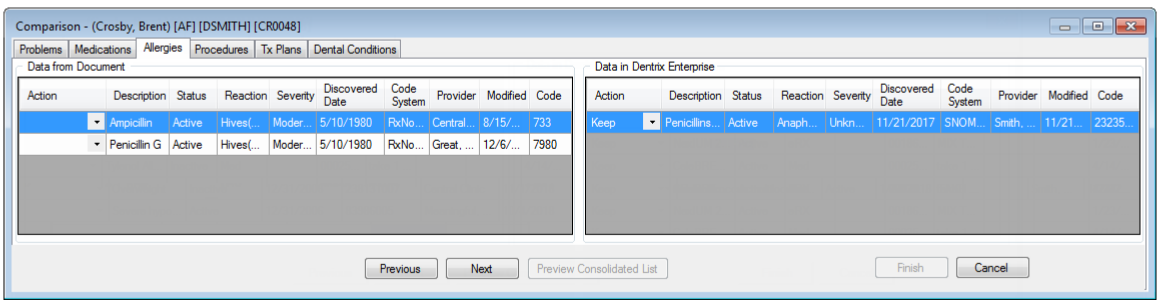
      - **Data from Document** – The list displays the problems on the document that you can add to the patient's record. For each problem, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the problem to the patient's record.
      - **Data in Dentrix Enterprise** – The list displays the problems that already exist in the patient's record. For each problem, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

- **Medications**



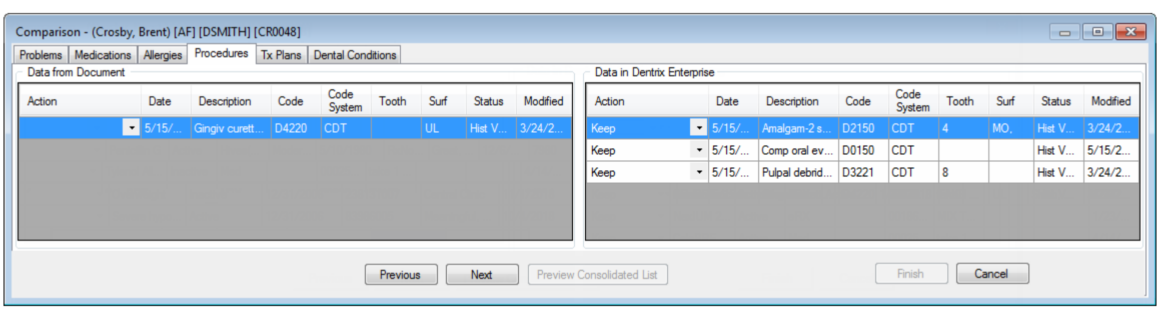
  - **Data from Document** – The list displays the medications on the document that you can add to the patient's record. For each medication, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the medication to the patient's record.
  - **Data in Dentrix Enterprise** – The list displays the medications that already exist in the patient's record. For each mediation, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

- **Allergies**



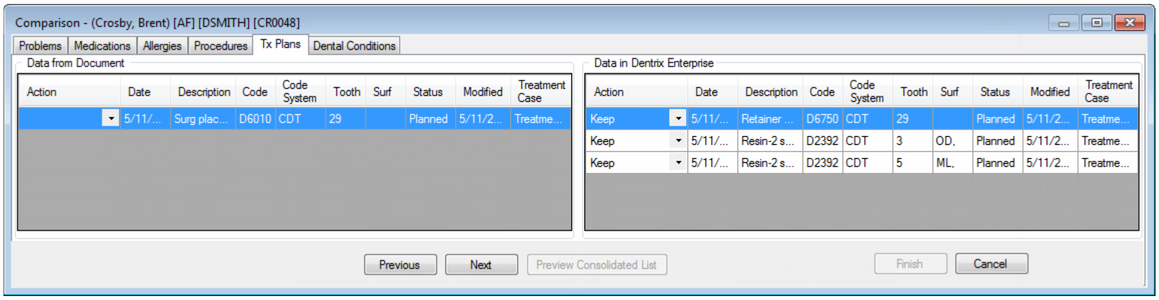
  - **Data from Document** – The list displays the allergies on the document that you can add to the patient's record. For each allergy, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the allergy to the patient's record.
  - **Data in Dentrix Enterprise** – The list displays the allergies that already exist in the patient's record. For each allergy, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

- **Procedures**



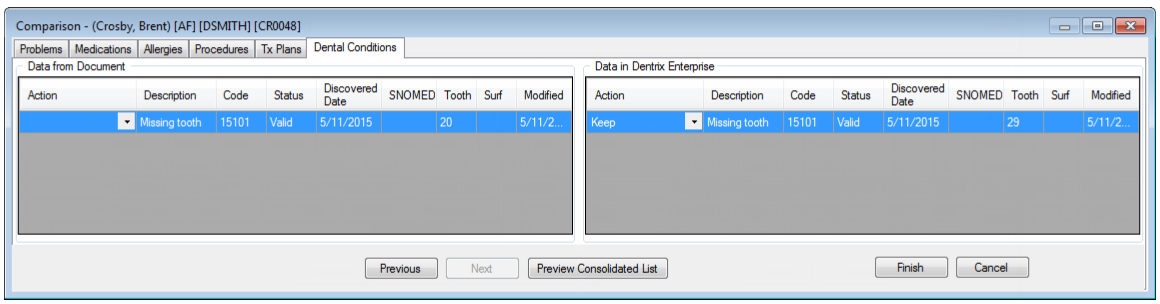
  - **Data from Document** – The list displays the completed procedures on the document that you can add to the patient's record. For each procedure, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the procedure to the patient's record.
  - **Data in Dentrix Enterprise** – The list displays the completed procedures that already exist in the patient's record. For each procedure, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

- **Tx Plans**



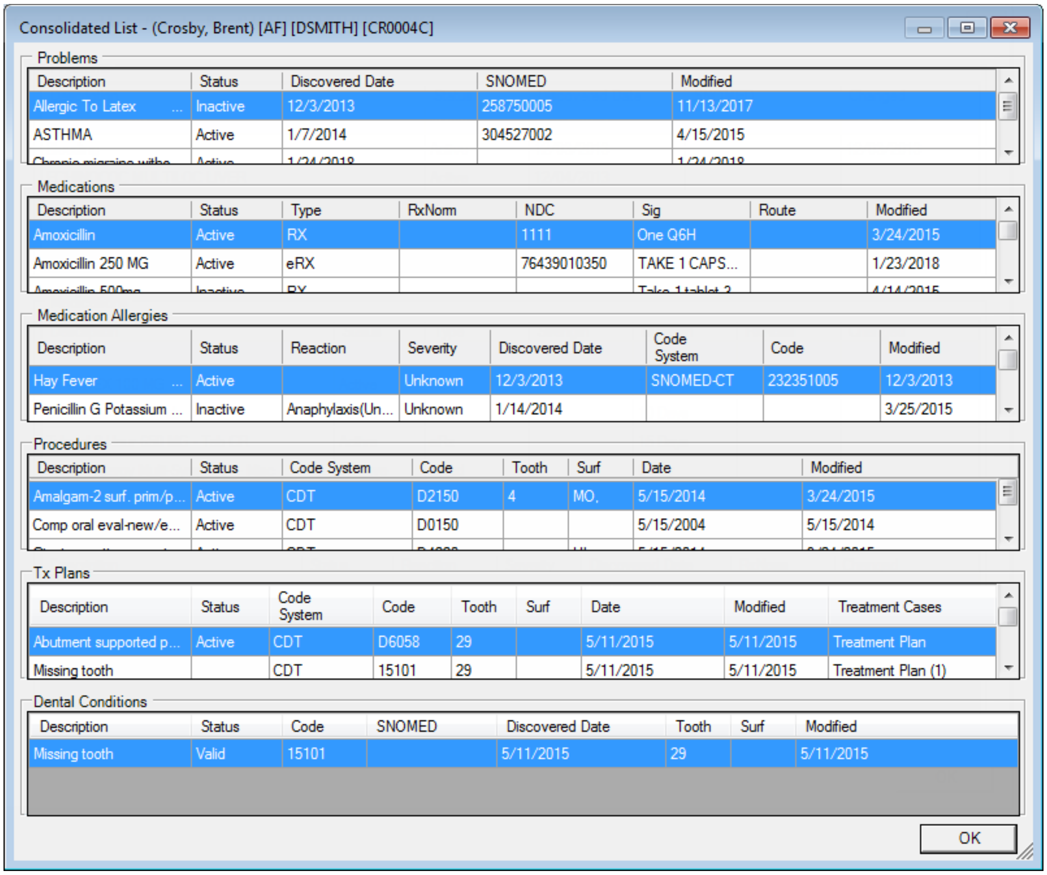
  - **Data from Document** – The list displays the treatment-planned procedures on the document that you can add to the patient's record. For each procedure, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the procedure to the patient's record.
  - **Data in Dentrix Enterprise** – The list displays the treatment-planned procedures that already exist in the patient's record. For each procedure, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

- **Dental Conditions**



  - **Data from Document** – The list displays the dental conditions on the document that you can add to the patient's record. For each condition, select **Add To Patient** or **Do Not Add** from the **Action** list to specify whether you want to add or not add the condition to the patient's record.
  - **Data in Dentrix Enterprise** – The list displays the dental conditions that already exist in the patient's record. For each condition, select **Keep**, **Update**, **Inactivate**, or **Remove** from the **Action** list. Data that is removed from Dentrix Enterprise will be available only in an audit trail report.

11. To view all the resulting changes to the problems, medications, allergies, completed procedures, treatment-planned procedures, and dental conditions (based on your selections on each tab), click **Preview Consolidated List**. Then, click **OK** to close the preview dialog box.

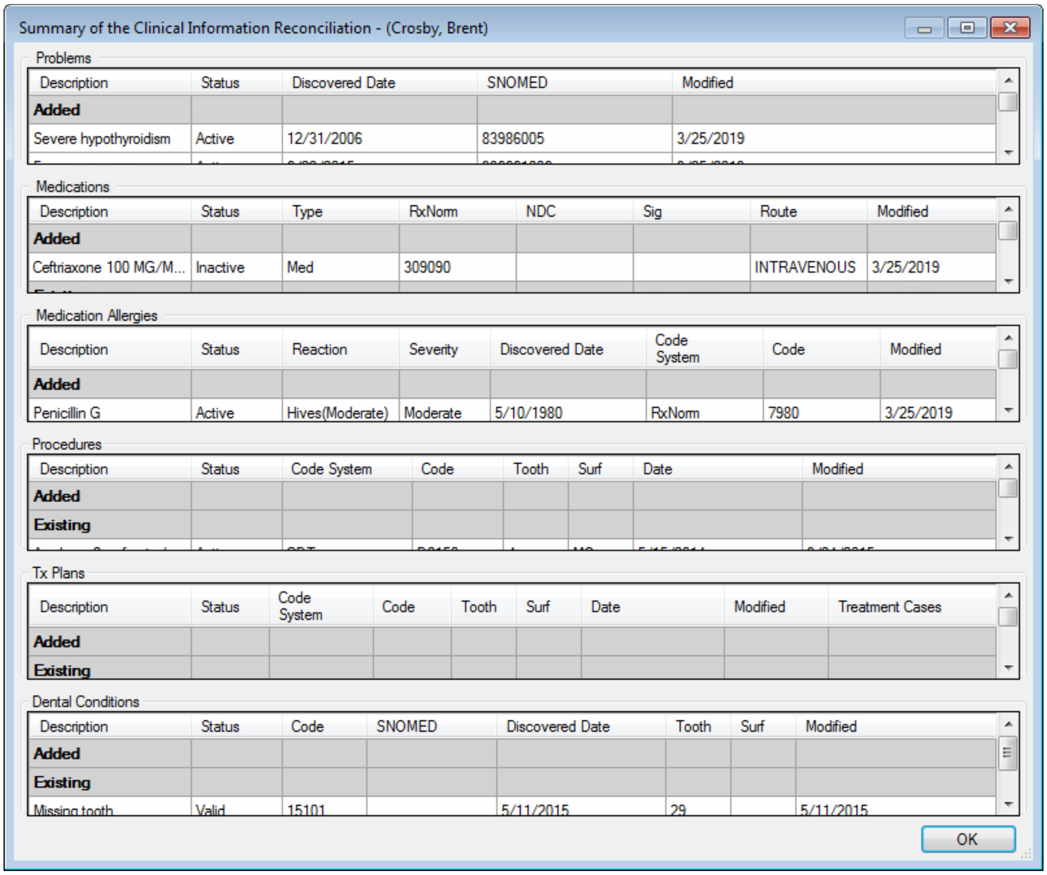


12. Click **Finish**.

    A confirmation message appears.

13. Click **Yes** to make the changes to the patient's record.

    A summary of the reconciliation appears.


Summary of the Clinical Information Reconciliation - (Crosby, Brent)
Problems
Description Status Discovered Date SNOMED Modified
Added
Severe hypothyroidism Active 12/31/2006 83986005 3/25/2019
Medications
Description Status Type RxNorm NDC Sig Route Modified
Added
Ceftriaxone 100 MG/M... Inactive Med 309090 INTRAVENOUS 3/25/2019
Medication Allergies
Description Status Reaction Severity Discovered Date Code System Code Modified
Added
Penicillin G Active Hives(Moderate) Moderate 5/10/1980 RxNorm 7980 3/25/2019
Procedures
Description Status Code System Code Tooth Surf Date Modified
Added
Existing
Tx Plans
Description Status Code System Code Tooth Surf Date Modified Treatment Cases
Added
Existing
Dental Conditions
Description Status Code SNOMED Discovered Date Tooth Surf Modified
Added
Existing
Missing tooth Valid 15101 5/11/2015 29 5/11/2015
OK

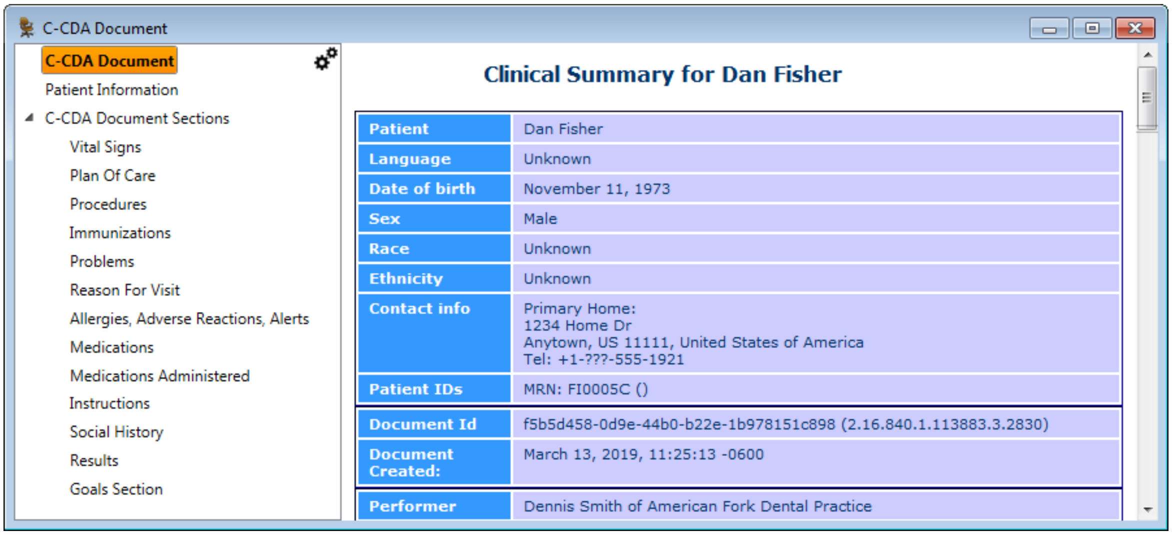
14. Click **OK**.

Customizing View Settings for C-CDA Documents

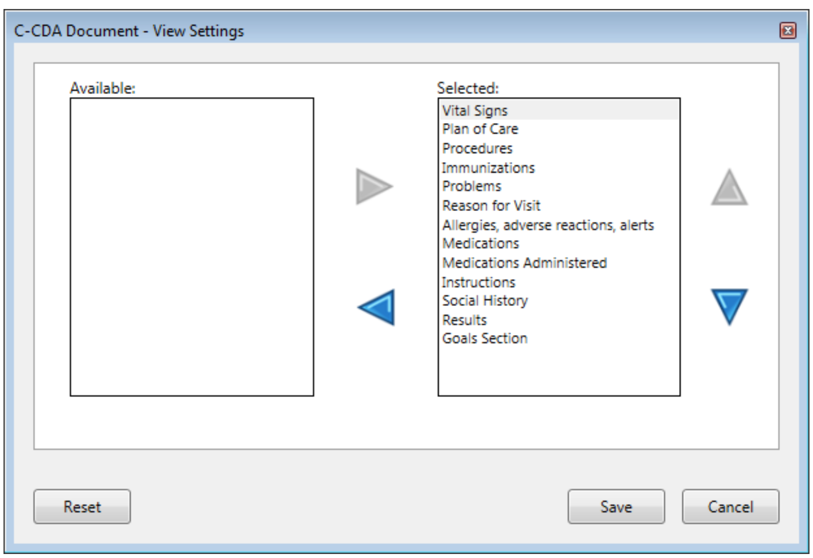
When you are viewing a C-CDA document (from an individual's patient health exchange or from the general patient health exchange inbox), you can now customize which sections appear, and in what order, when you view these types of documents.

To customize the view settings

1. In the **C-CDA Document** dialog box, click the **View Settings** icon .



The **C-CDA Document - View Settings** dialog box appears.



2. Do any of the following:
   - To hide a section, select it in the **Selected** list, and then click the left arrow.
   - To show a section that you have hidden previously, select it in the **Available** list, and then click the right arrow.
   - To change the display order of the sections on the document, select a section in the **Selected** list, and then click the up or down arrow as needed; repeat this as needed to rearrange other sections.
3. When you are finished customizing the view, click **Save**.

   The specified view settings are saved for all C-CDA documents that you view from now on.

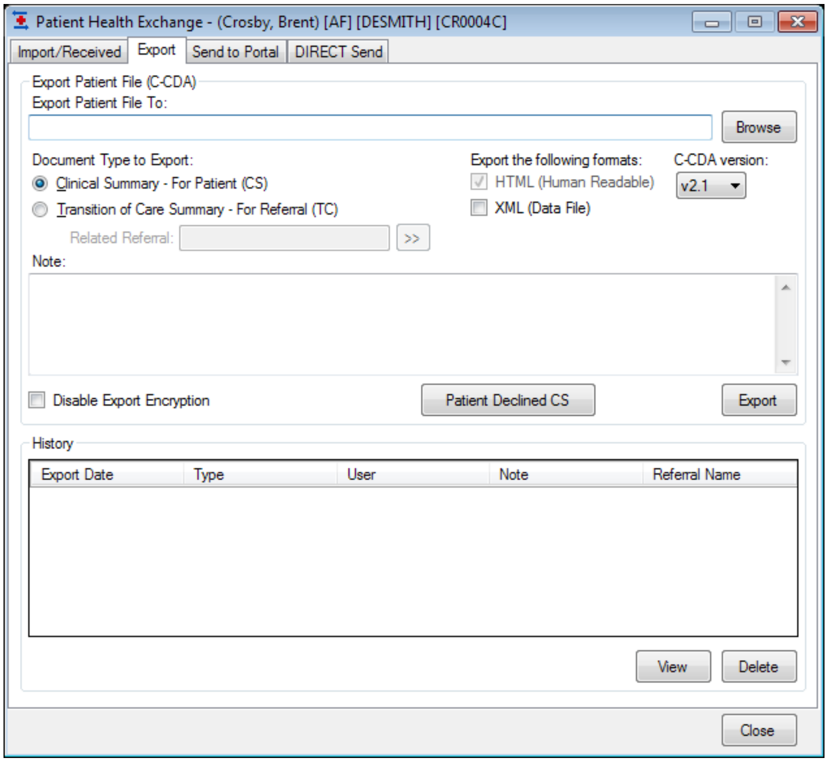
Exporting from the Patient Health Exchange

When you are exporting a patient's C-CDA, you can now select which C-CDA version to use for the document, and you can now disable encryption of the exported file.

To export a C-CDA

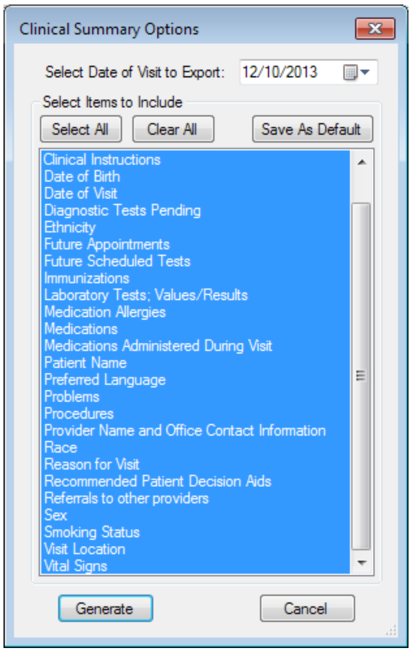
1. With a patient selected in the Family File, on the **File** menu, click **Patient Health Exchange**.

   The **Patient Health Exchange** dialog box appears.



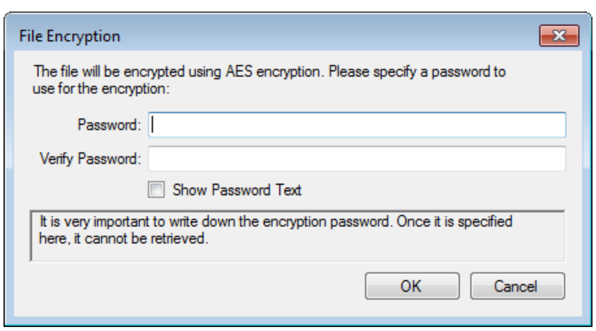
2. On the **Export** tab, next to **Export Patient File To**, click **Browse** to select the location where you want to save the .html file (a human-readable format) and C-CDA file (an .xml file that is computer readable).
3. Set up any of the following options:
   - **Document Type to Export** – Select what you want to include in the output file: **Clinical Summary - For Patient (CS)** or **Transition of Care - For Referral (TC)**. If you are exporting a transition of care summary, click the **Related Referral** search button >> to select the referral (to) that you want to associate with the summary. The related referral is required for you to be able to export the summary.
   - **Export the following formats** – The **HTML (Human Readable)** check box is always selected and cannot be cleared. Select the **XML (Data File)** check box to have the file contain data in an XML format. If the **Transition of Care - For Referral (TC)** option is selected, the **XML (Data File)** check box is selected automatically by default but can be cleared. Select the appropriate C-CDA Version for the data being exported (v2.1 is the default).
   - **Note** – Type any notes that you want to attach to the export. Notes are only for your reference and are not included in the text of the file.
   - **Disable Export Encryption** – With this check box clear, the file will be encrypted with AES encryption, and a password that you specify will be required to open the file. With this check box selected, the file will not be encrypted.

4. Click **Export**. Alternatively, if a summary has not already been exported on the current date, and the patient has declined the clinical summary, click **Patient Declined CS** and then **Yes** on the confirmation message that appears.
5. Do one of the following:
   - If you are exporting a clinical summary, in the **Clinical Summary Options** dialog box that appears, select the date of the visit that you want to export information for, select what you want to include in the summary, and then click **Generate**.

   - If you are exporting a transition of care summary, a message appears when the export is complete. Click **OK**.

   If the **Disable Export Encryption** check box was clear in step 3, the **File Encryption** dialog box appears. Otherwise, ignore the steps that follow.

6. Enter a password for opening the exported file (which will be encrypted) in the **Password** box. Retype the password in the **Verify Password** box.

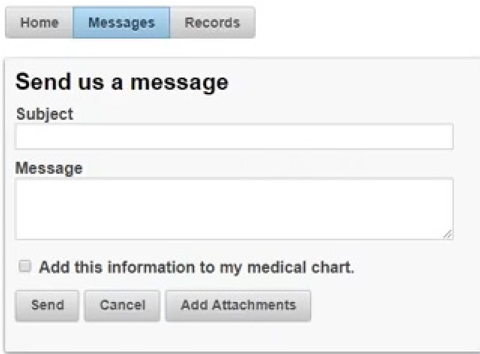
   Note: To see the password so that you can verify it's correct or take note of it, select the **Show Password Text** check box. The password cannot be accessed anywhere in Dentrix Enterprise after you click **OK**, and no one can open the file without the password.

7. Click **OK**.

Viewing Patient Messages

You can view a message from a patient (through the Updox portal), with the **Add this information to my medical chart** check box selected (this is a new option), and with or without attachments, on the new **Patient Messages** tab of the patient health exchange inbox or from the patient's **Medical Alerts** window.

Note: For a message regarding health information to appear with the patient messages, when composing the message, the patient must select the **Add this information to my medical chart** check box. The patient can send the message with or without an attachment.



To view a patient message

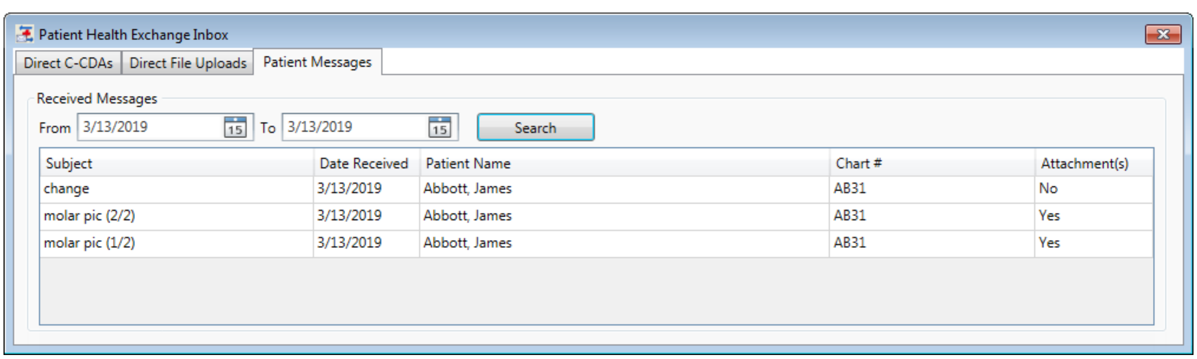
1. In the Office Manager, from the **File** menu, click **Patient Health Exchange Inbox**.

   A progress indicator appears, followed by a completion message.

2. Click **Close**.

   The **Patient Health Exchange Inbox** dialog box appears.

3. Select the **Patient Messages** tab.



   Note: By default, the messages received today appear. To specify a different time range, change the **From** and/or **To** date, and then click **Search**.

4. From here, you can see which patients sent messages regarding their health information.

5. To find out what (if any) information you need to update in the record of a patient who sent a message, do the following:

   a. Open that patient's **Medical Alerts** window.

   b. Click the **External Health Info** button .

      The **Patient Health Information** dialog box appears.

   c. For any messages, do any of the following:

      - **Visit a website** – If the **Body** of the message has a link, click the link to visit the corresponding website. The website opens in your Web browser.
      - **View an attachment** – If the message has attachments, a **View** link appears in the **Attachment** column. Click the link to open the **Patient Health Information Attachments Viewer** dialog box and view the attachments. You can preview the content of any attachment that is of a file type that you can preview in the Document Center (such as document and image file types).

   d. When you are finished viewing the messages, close the dialog box.

Importing Direct File Uploads

You can now view a DIRECT message (from a provider) or a message from a patient (through the Updox portal), with file attachments (such as image or text files), on the new **Direct File Uploads** tab of the patient health exchange inbox. From there, you can also attach the message and the attached files to a patient's record.

To import a file upload

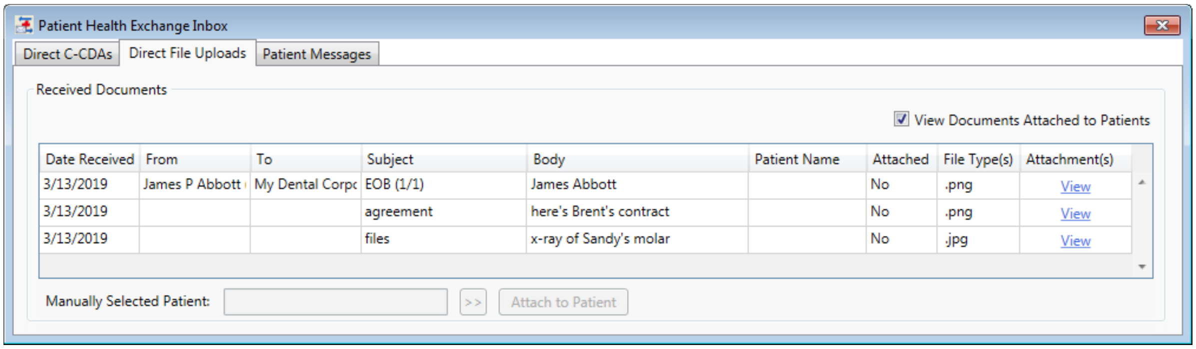
1. In the Office Manager, from the **File** menu, click **Patient Health Exchange Inbox**.

   A progress indicator appears, followed by a completion message.

2. Click **Close**.

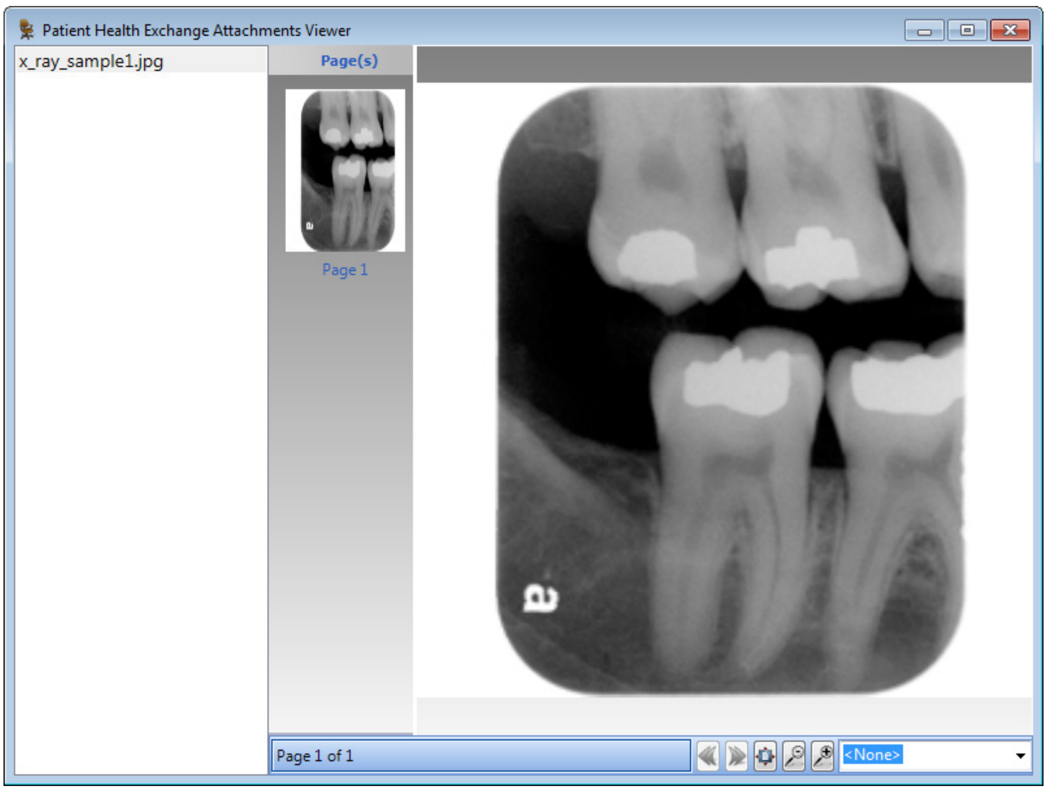
   The **Patient Health Exchange Inbox** dialog box appears.

3. Select the **Direct File Uploads** tab.



Note: To view messages with files that are already attached to the correct patients, select the **View Documents Attached to Patients** check box. Messages with files that are not attached to patients still appear in the **Received Documents** list.

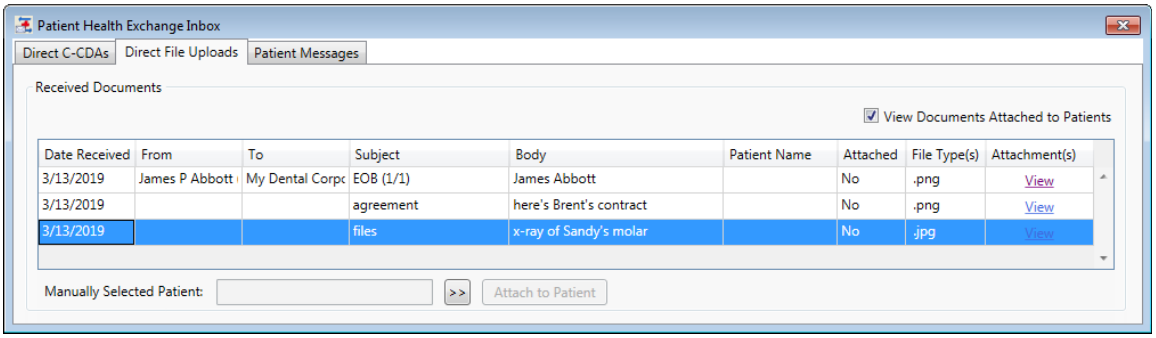
4. To view the file attached to a message, click the corresponding **View** link. When you are finished viewing the file, close the **Patient Health Exchange Attachments Viewer** dialog box.



Note: You can preview the content of any attachment that is of a file type that you can preview in the Document Center (such as document and image file types). When you are finished viewing the file, close the dialog box.

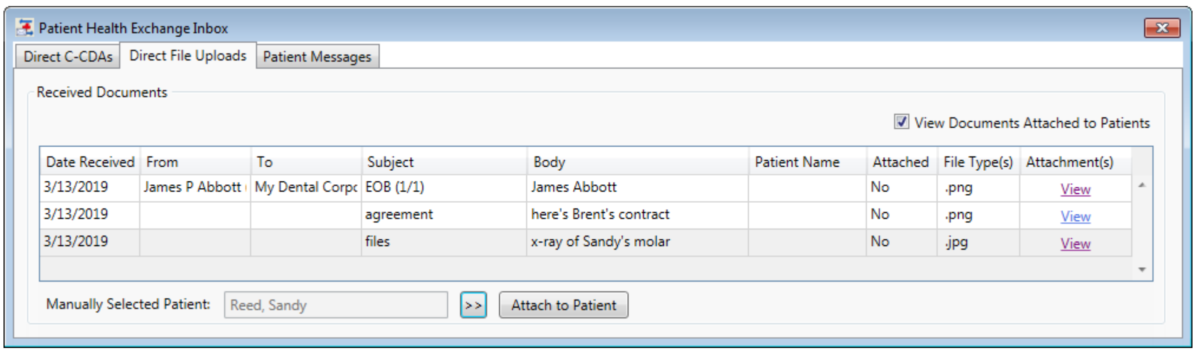
5. To select the patient record in Dentrix Enterprise to which you want to attach a file upload, do the following (otherwise, ignore the steps that follow):

   a. Select the message (if not already selected).



b. Click the **Manually Selected Patient** search button >> to select the correct patient.

The selected patient appears in the **Manually Selected Patient** box.



6. Click **Attach to Patient**.

   A message appears, stating that the file was imported successfully.

7. Click **OK**.

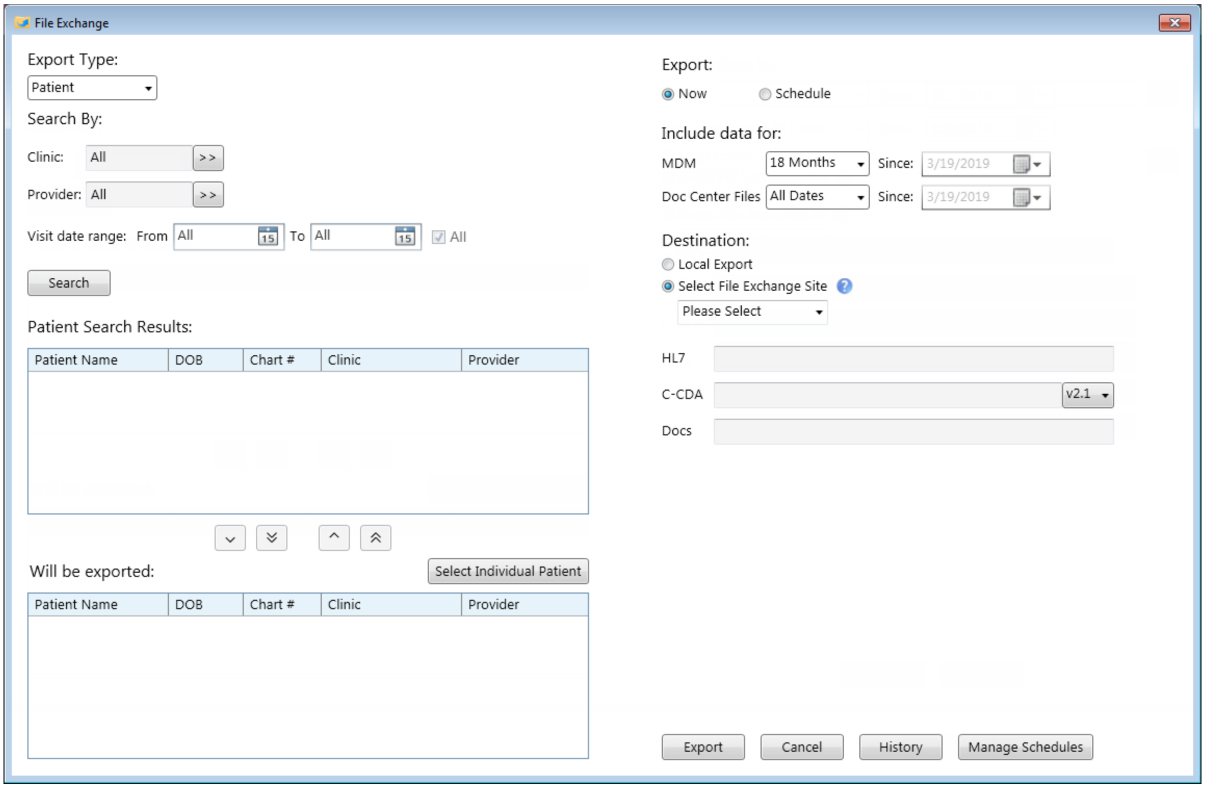
Performing Patient Data Exports (Local)

When you are exporting patient data, you can now filter your patient search results by provider and by visit date. You can now select which C-CDA version to use for C-CDA documents.

To export patient data (local)

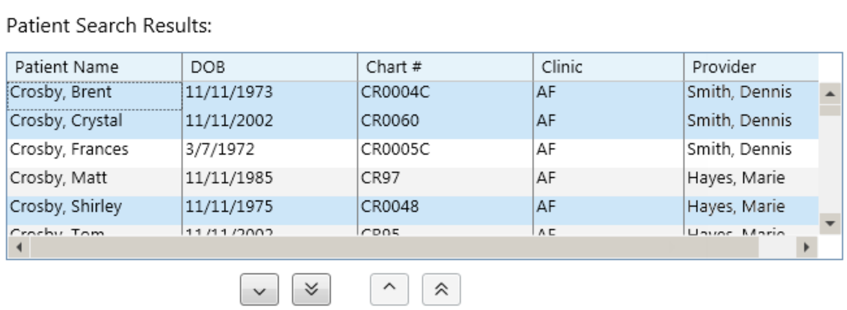
1. In the Office Manager, from the **Analysis** menu, click **File Exchange**.

   The **File Exchange** dialog box appears. By default, **Patient** is selected as the **Export Type**.



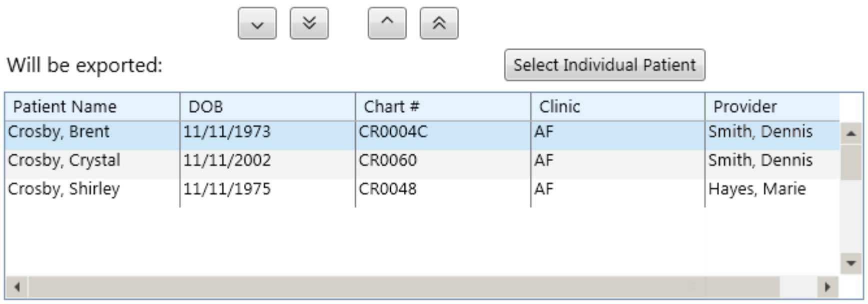
2. Do any of the following as needed to add patients to the export:
   - To search for multiple patients, do the following:
     a. For **Clinic**, either leave **All** selected to search for patients in all clinics, or click the search button to select specific clinics.
     b. For **Provider**, either leave **All** selected to search for patients who visited any provider, or click the search button to select specific providers.
     c. For **Visit date range**, either leave **All** selected to search for patients with visits in any time frame, or clear the check box and specify a date range (which can be open ended) in the **From** and/or **To** box.
     d. Click **Search**.

        The patients found appear in the **Patient Search Results** list.

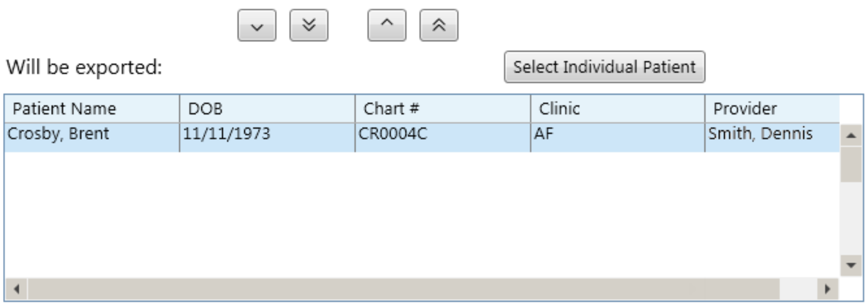


     e. Select patients in the **Patient Search Results** list, and then click the **Move Down** button. To add all the patients found, click the **Move All Down** button.

The patients now appear in the **Will be exported** list.

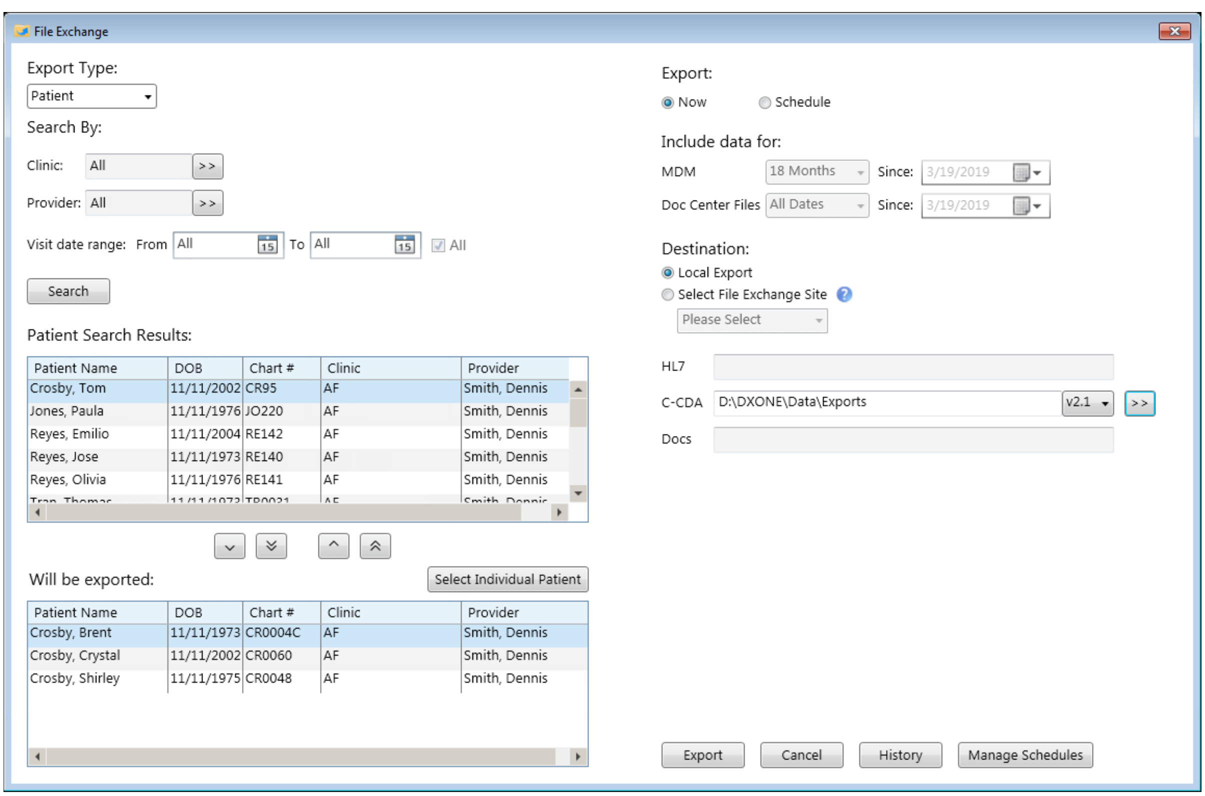


- To search for an individual patient, next to **Will be exported**, click **Select Individual Patient** to select that patient. The patient now appears in the **Will be exported** list.



Note: To remove all the selected patients from the export, click the **Move All Up** button. To remove specific patients from the export, select those patients in the **Will be exported** list, and then click the **Move Up** button.

3. Under **Export**, select **Now**.



4. Under **Destination**, select **Local Export**.
5. Click the **C-CDA** search button >> to select the destination folder where the C-CDA files will be saved.
6. Next to the **C-CDA** box, select the appropriate C-CDA version for the files (v2.1 is the default).
7. Click **Export**.

   A message appears, stating that the export was successful.
8. Click **OK**.

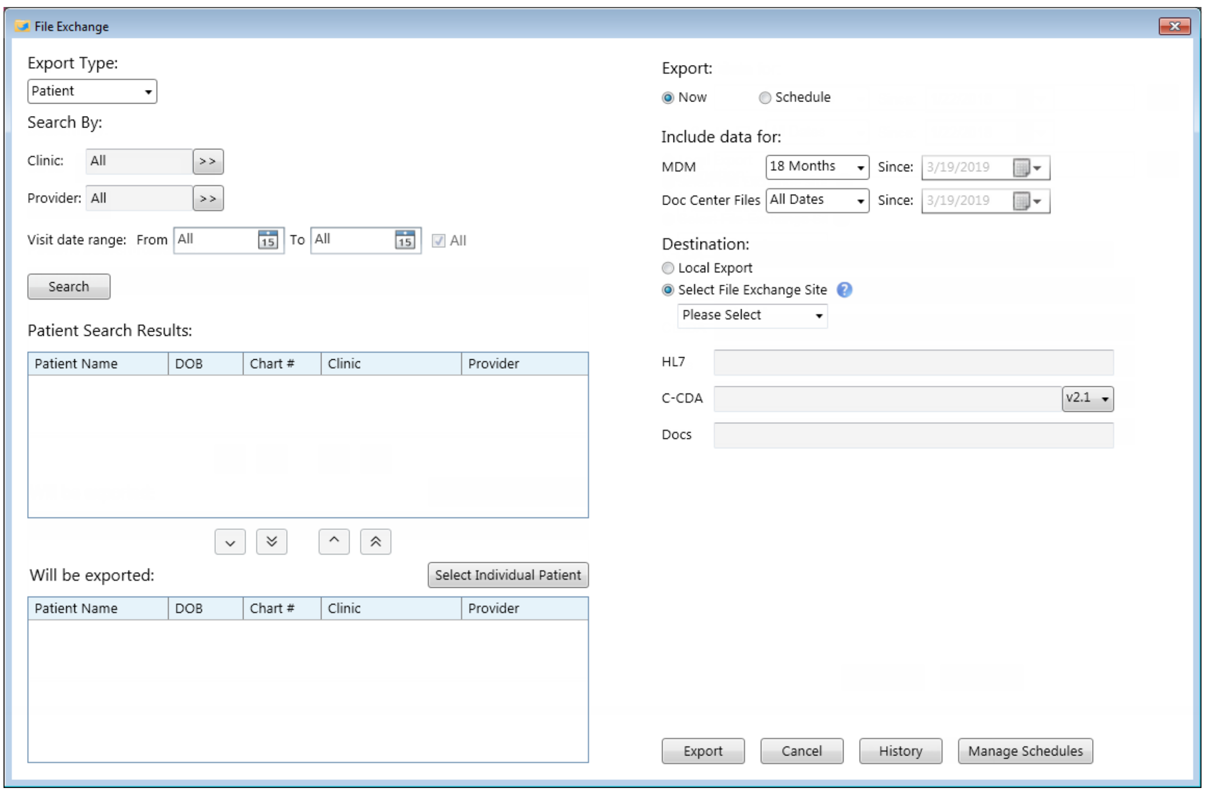
Performing Exports to a File Exchange Site

When you are exporting patient or provider/staff data to a file exchange site, you can now specify a name for the file group that gets exported. Also, you can view the history of file group exports.

To export patient data to a file exchange site

1. In the Office Manager, from the **Analysis** menu, click **File Exchange**.

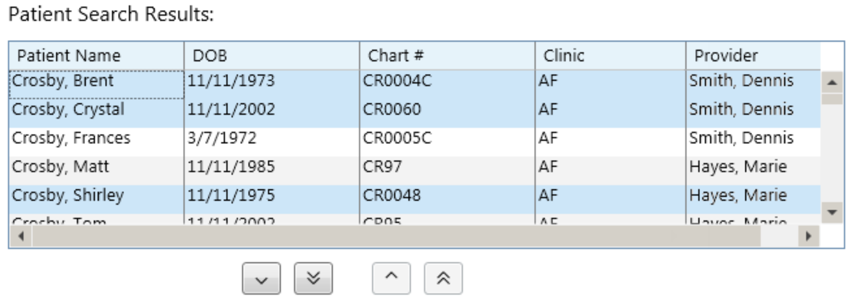
   The **File Exchange** dialog box appears. By default, **Patient** is selected as the **Export Type**.



2. Do any of the following as needed to add patients to the export:
   - To search for multiple patients, do the following:
     a. For **Clinic**, either leave **All** selected to search for patients in all clinics, or click the search button >> to select specific clinics.
     b. For **Provider**, either leave **All** selected to search for patients who visited any provider, or click the search button >> to select specific providers.
     c. For **Visit date range**, either leave **All** selected to search for patients with visits in any time frame, or clear the check box and specify a date range (which can be open ended) in the **From** and/or **To** box.

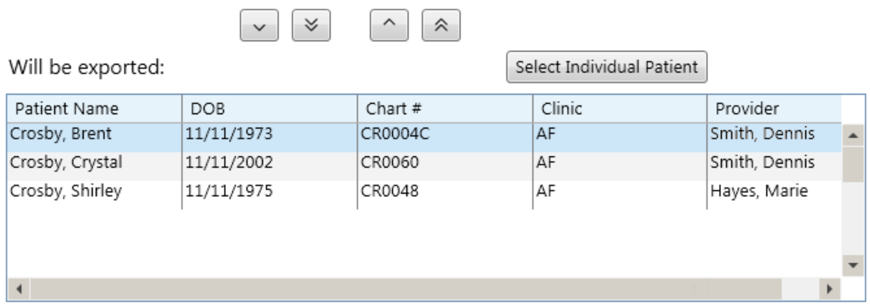
d. Click **Search**.

The patients found appear in the **Patient Search Results** list.

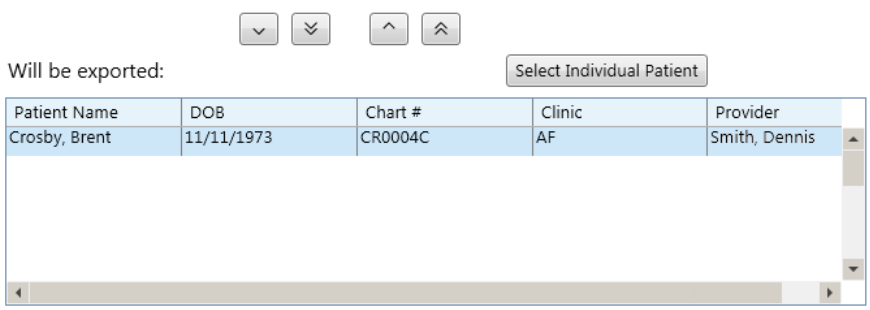


e. Select patients in the **Patient Search Results** list, and then click the **Move Down** button. To add all the patients found, click the **Move All Down** button.

The patients now appear in the **Will be exported** list.

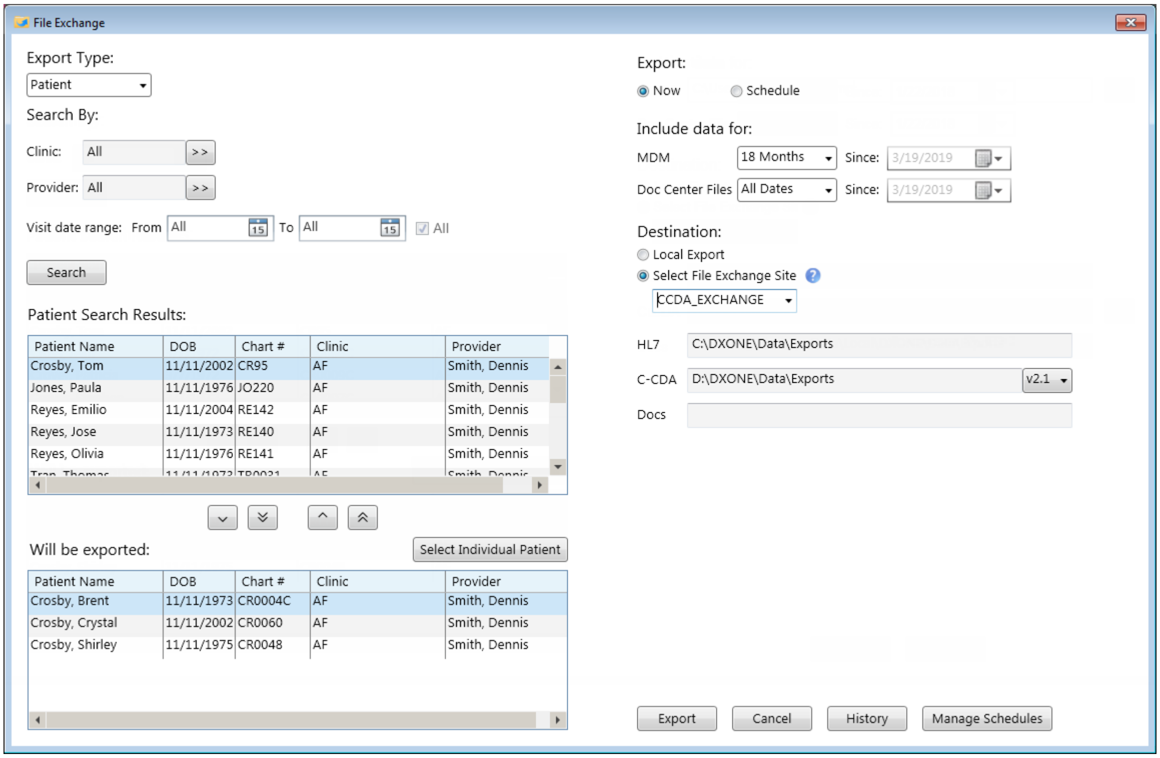


- To search for an individual patient, next to **Will be exported**, click **Select Individual Patient** to select that patient. The patient now appears in the **Will be exported** list.



Note: To remove all the selected patients from the export, click the **Move All Up** button. To remove specific patients from the export, select those patients in the **Will be exported** list, and then click the **Move Up** button.

3. Under **Export**, select **Now**.

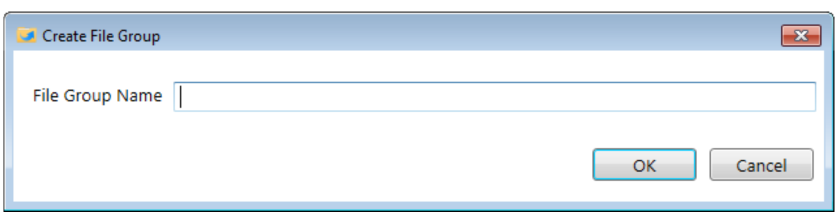


4. Under **Destination**, select **Select File Exchange Site**, and then select a site from the list. The corresponding destination folders for **HL7** and either **C-CDA** or **Docs** appear for your reference.

   Note: This method of exporting data is available only if you have set up one or more file exchange sites in the Integration Settings

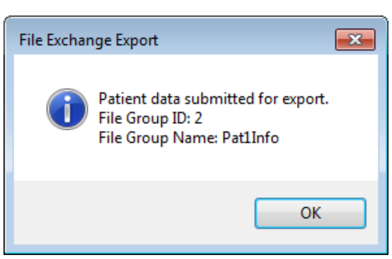
5. Next to the **C-CDA** box, select the appropriate C-CDA version for the files (v2.1 is the default).
6. Under **Include data for**, next to **MDM** and **Doc Center Files**, specify whether to include data for the past **18 Months**, for **All Dates**, since a certain date (select **Date Range**, and then specify a **Since** date), or for **Today**.
7. Click **Export**.

   The **Create File Group** dialog box appears.



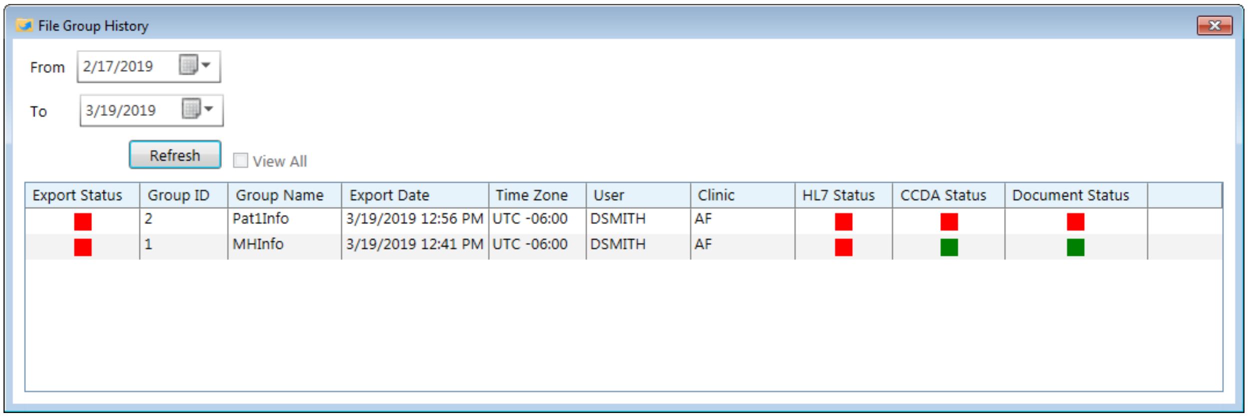
8. Enter a name for the file group, and then click **OK**.

   A message appears.



9. Click **OK**.

Note: To view the history of file group exports (exports to file exchange sites), in the **File Exchange** dialog box, click **History** to open the **File Group History** dialog box. Enter the **From** and **To** dates, and then click **Refresh**.



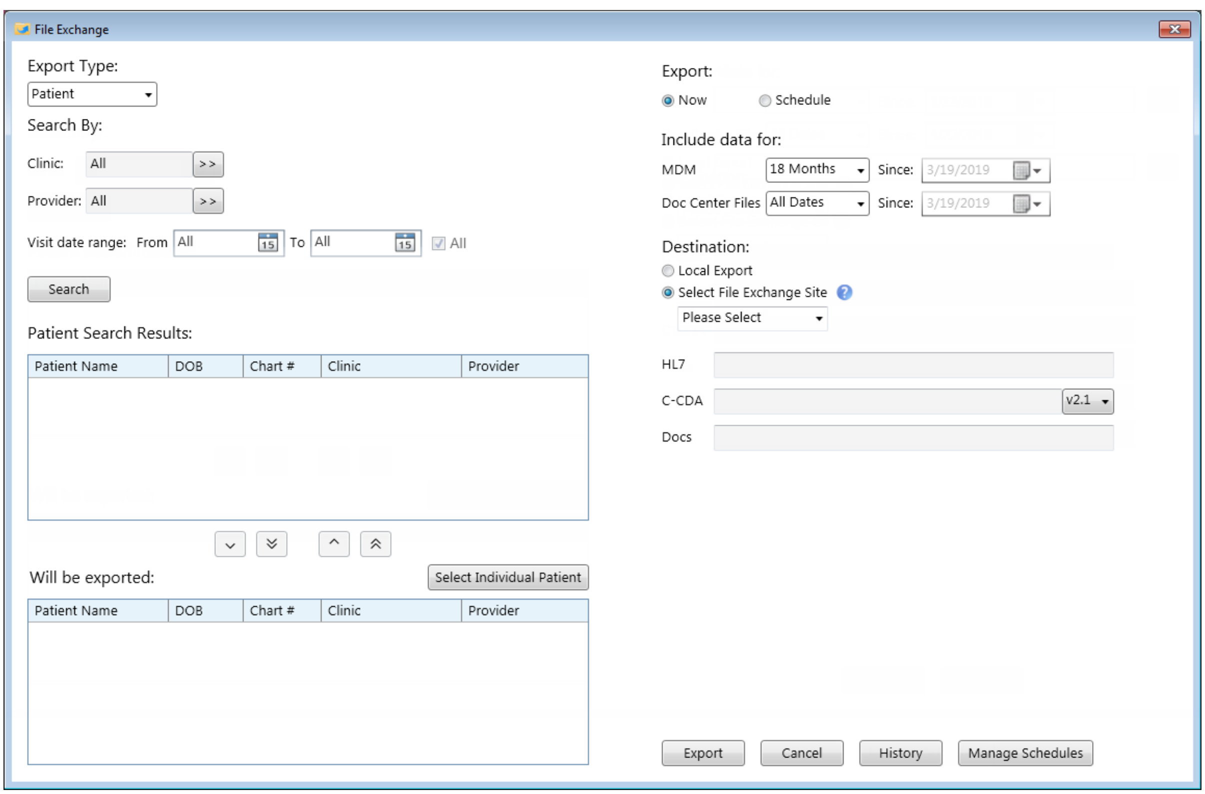
Scheduling Patient Data Exports

You can now schedule the export of patient data to a file exchange site. And, you can view and delete scheduled export jobs.

To schedule the export of patient data

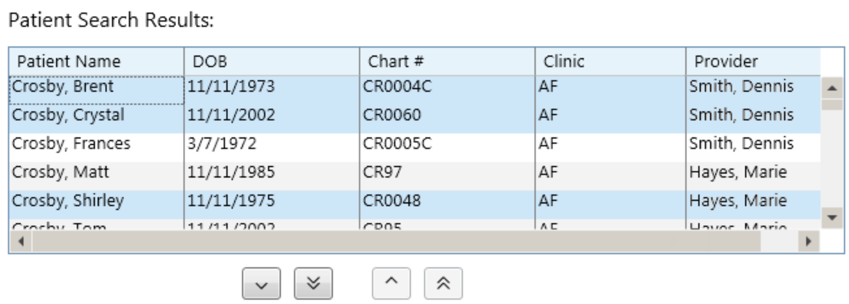
1. In the Office Manager, from the **Analysis** menu, click **File Exchange**.

   The **File Exchange** dialog box appears. By default, **Patient** is selected as the **Export Type**.



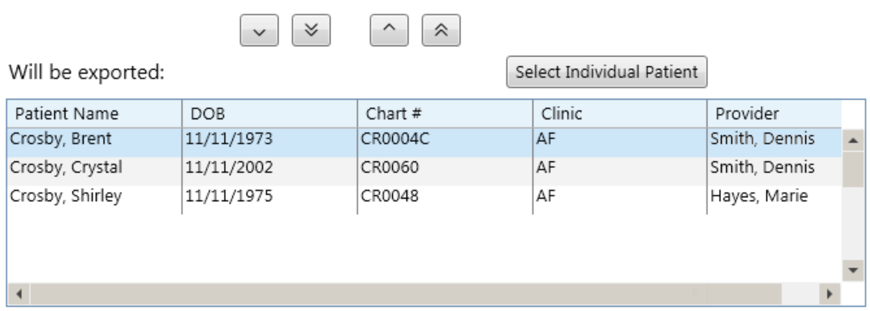
2. Do any of the following as needed to add patients to the export:
   - To search for multiple patients, do the following:
     a. For **Clinic**, either leave **All** selected to search for patients in all clinics, or click the search button to select specific clinics.
     b. For **Provider**, either leave **All** selected to search for patients who visited any provider, or click the search button to select specific providers.
     c. For **Visit date range**, either leave **All** selected to search for patients with visits in any time frame, or clear the check box and specify a date range (which can be open ended) in the **From** and/or **To** box.
     d. Click **Search**.

        The patients found appear in the **Patient Search Results** list.

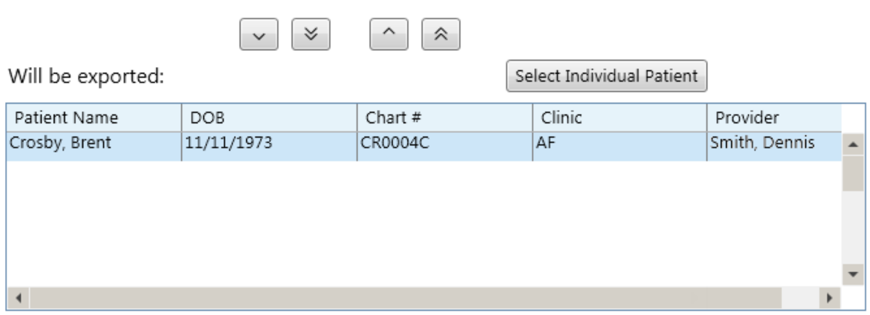


     e. Select patients in the **Patient Search Results** list, and then click the **Move Down** button. To add all the patients found, click the **Move All Down** button.

     The patients now appear in the **Will be exported** list.

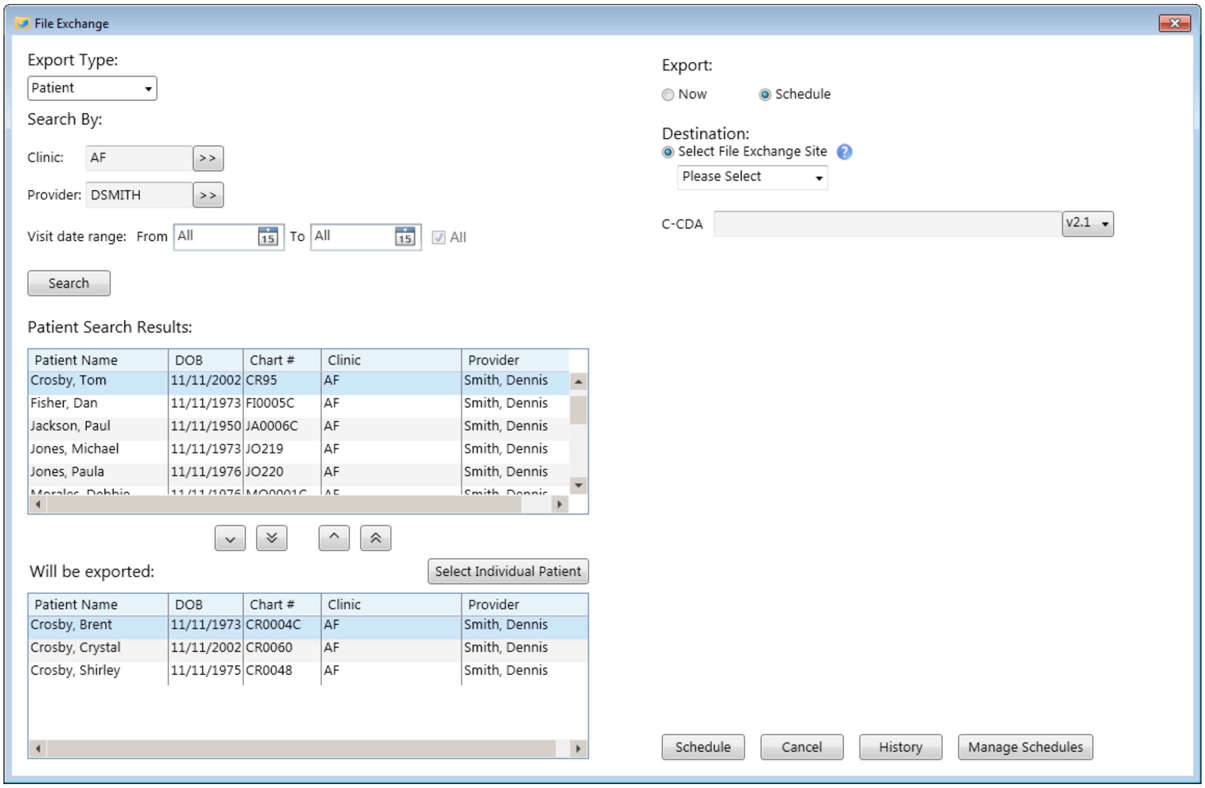


   - To search for an individual patient, next to **Will be exported**, click **Select Individual Patient** to select that patient. The patient now appears in the **Will be exported** list.

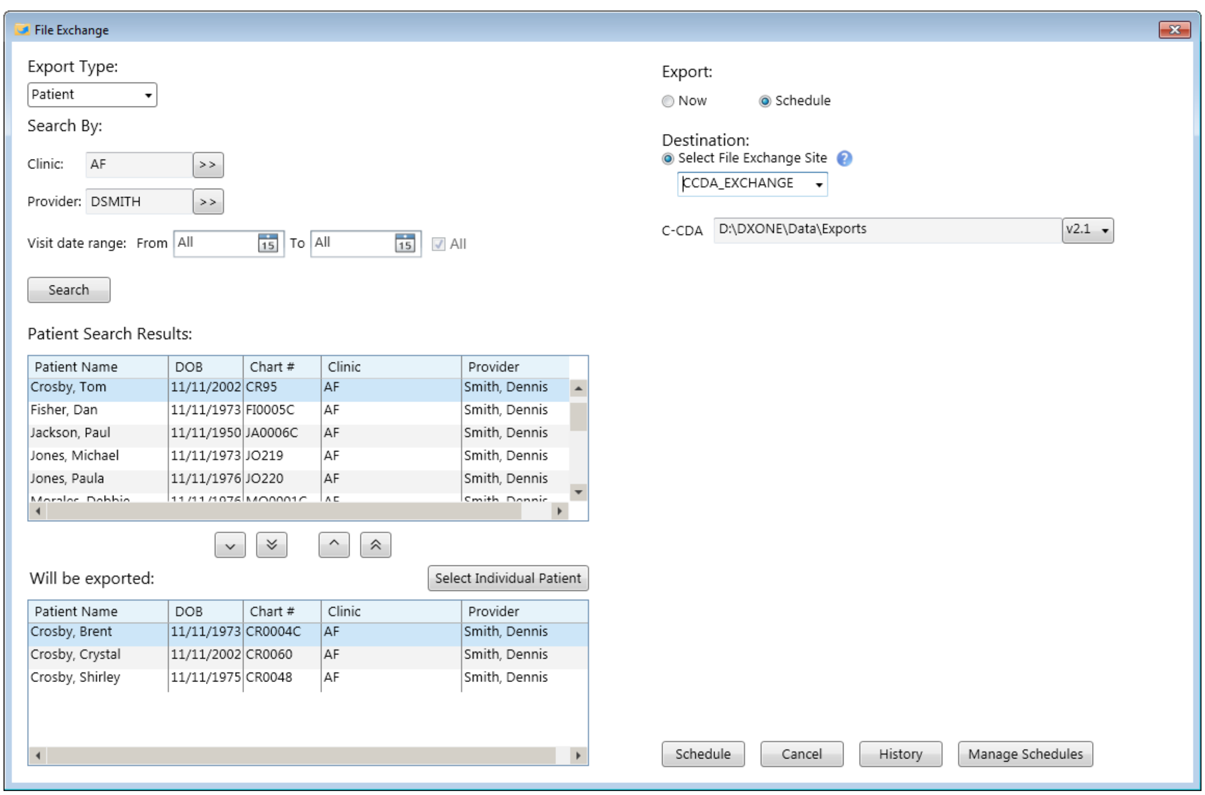


Note: To remove all the selected patients from the export, click the **Move All Up** button. To remove specific patients from the export, select those patients in the **Will be exported** list, and then click the **Move Up** button.

3. To schedule the export for a later time or on a recurring basis, under **Export**, select **Schedule**.

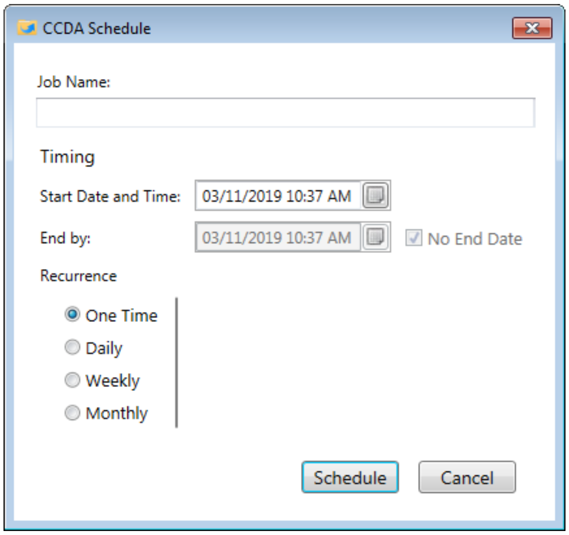


4. Under **Destination**, select a site from the **Select File Exchange Site** list. The corresponding **C-CDA** destination folder appears for your reference.
5. Next to the **C-CDA** box, select the appropriate C-CDA version for the files (v2.1 is the default).

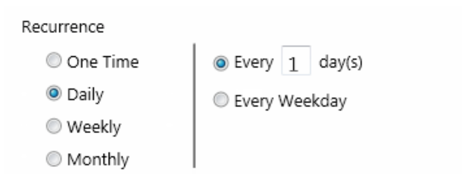


6. Click **Schedule**.

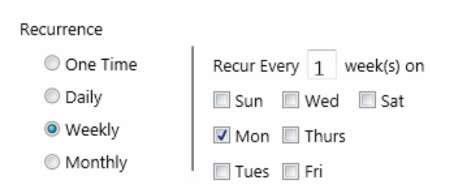
The **CCDA Schedule** dialog box appears.



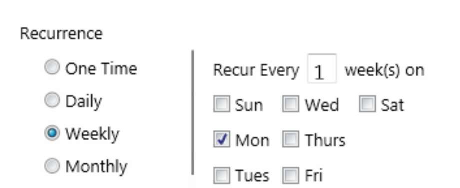
7. Enter a **Job Name** for easy identification later on.
8. Under **Recurrence**, select how often you want the export job to run:
   - **One Time** – Select to run the export job once.
   - **Daily** – Select to run the export job every specified number of days or every week day. Select **Every [number of] day(s)**, and then enter the number of days in the box; or, select **Every Weekday**.



   - **Weekly** – Select to run the export job every specified number of weeks and on specified days. Enter the number of weeks in the **Recur Every [number of] week(s) on** box, and then select the desired days of the week.



   - **Monthly** – Select to run the export job every specified number of months on a specified day of the month. Select a day, and enter the number of months in the **of every [number of] month(s)**.



9. Under **Timing**, specify when to run the export job. In the **Start Date and Time** box, enter the date and time that you want to begin running the export job. In the **End by** box, enter the date and time that you want to stop automatically running the export job, or select **No End Date** to continue running the export job until the job is manually deleted from the scheduled jobs list. The **End by** and **No End Date** options are not available if **One Time** is selected as the recurrence pattern.

10. Click **Schedule**.

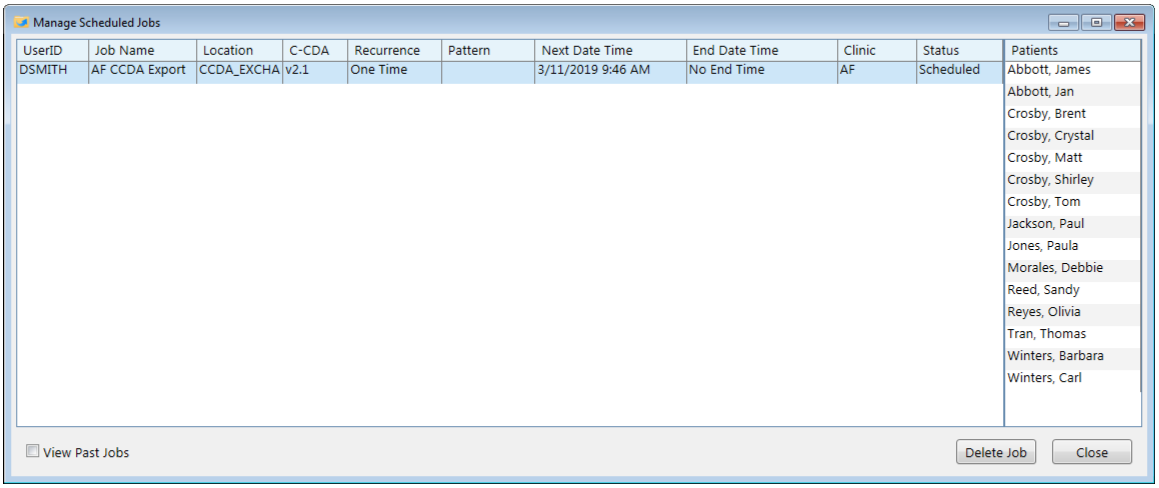
    A message appears, stating that the job was scheduled successfully.

11. Click **OK**.

12. To manage scheduled export jobs, do the following:

    a. In the **File Exchange** dialog box, click **Manage Schedules**.

       The **Manage Scheduled Jobs** dialog box appears.



    b. Do any of the following:

       - To view jobs that have already run, select the **View Past Jobs** check box.
       - To view the patients included in an export job, select that job. The patients appear in the **Patients** list on the right.
       - To delete an active job (you cannot delete a past job), select that job, and then click **Delete Job**. On the confirmation message that appears, click **Yes**.

    c. When you are finished managing the jobs, click **Close** to close the dialog box.

Customizing an Ethnicity Definition

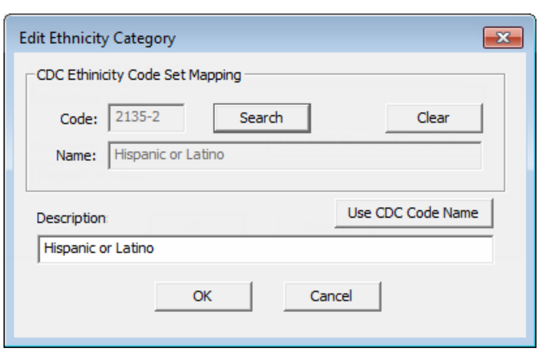
You can now map a CDC ethnicity code to an ethnicity definition, and you can use the name of that CDC ethnicity code as the definition's description.

To customize Ethnicity

1. In the **Practice Definitions** dialog box, from the **Definition Type** list, select **Ethnicity**.

2. To edit a definition, select that definition, and then click **Edit**.

   The **Edit Ethnicity Category** dialog box appears.



Note: Any changes will affect all instances of this ethnicity that have been assigned to patients.

3. To add a **CDC Ethnicity Code Set Mapping**, click **Search** to select the correct ethnicity code and name pair.

   Note: To remove a **CDC Ethnicity Code Set Mapping**, click **Clear**.

4. Click **Use CDC Code Name** to insert the standard name for the ethnicity in the **Description** box. You can edit the **Description** as needed.
5. Enter a new or edit the existing **Description** for the ethnicity. This box has a limit of 50 characters.
6. Click **OK**.

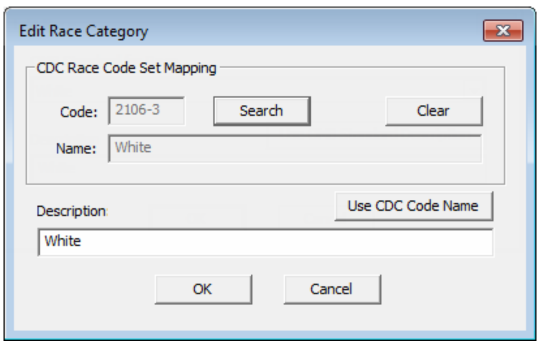
Customizing a Race Definition

You can now map a CDC race code to a race definition, and you can use the name of that CDC race code as the definition's description.

To customize Race

1. In the **Practice Definitions** dialog box, from the **Definition Type** list, select **Race**.
2. To edit a definition, select that definition, and then click **Edit**.

   The **Edit Race Category** dialog box appears.



   Note: Any changes will affect all instances of this race that have been assigned to patients.

3. To add a **CDC Race Code Set Mapping**, click **Search** to select the correct race code and name pair.

   Note: To remove a **CDC Race Code Set Mapping**, click **Clear**.

4. Click **Use CDC Code Name** to insert the standard name for the race in the **Description** box. You can edit the **Description** as needed.
5. Enter a new or edit the existing **Description** for the race. This box has a limit of 50 characters.
6. Click **OK**.

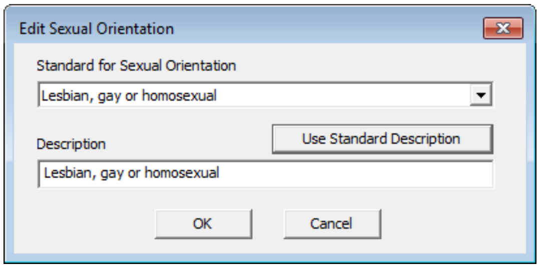
Customizing a Sexual Orientation Definition

You can now map a standard description to a sexual orientation definition, and you can use that standard description as the definition's description.

To customize Sexual Orientation

1. In the **Practice Definitions** dialog box, from the **Definition Type** list, select **Sexual Orientation**.
2. To edit a definition, select that definition, and then click **Edit**.

   The **Edit Sexual Orientation** dialog box appears.



Note: Any changes will affect all instances of this sexual orientation that have been assigned to patients.

3. Select a standard sexual orientation description from the **Standard for Sexual Orientation** list.
4. Click **Use Standard Description** to insert the standard name for the sexual orientation in the **Description** box. You can edit the **Description** as needed.
5. Enter a new or edit the existing **Description** for the sexual orientation. This box has a limit of 50 characters.
6. Click **OK**.

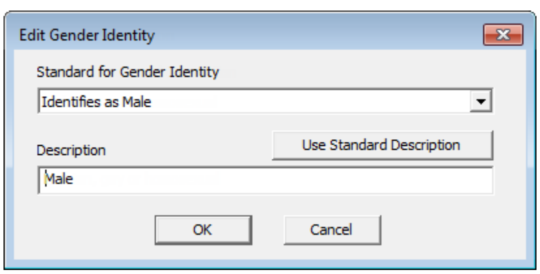
Customizing a Gender Identity Definition

You can now map a standard description to a gender identity definition, and you can use that standard description as the definition's description.

To customize Gender Identity

1. In the **Practice Definitions** dialog box, from the **Definition Type** list, select **Gender Identity**.
2. To edit a definition, select that definition, and then click **Edit**.

   The **Edit Gender Identity** dialog box appears.



Note: Any changes will affect all instances of this gender identity that have been assigned to patients.

3. Select a standard gender identity description from the **Standard for Gender Identity** list.
4. Click **Use Standard Description** to insert the standard name for the gender identity in the **Description** box. You can edit the **Description** as needed.
5. Enter a new or edit the existing **Description** for the gender identity. This box has a limit of 50 characters.
6. Click **OK**.

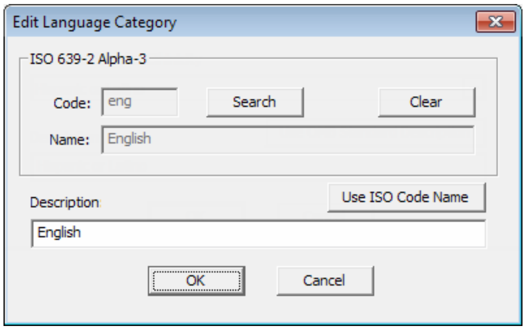
Customizing a Language Definition

You can now map an ISO 639-2 Alpha-3 language code to a language definition, and you can use the name of that ISO language code as the definition's description.

To customize Language Category

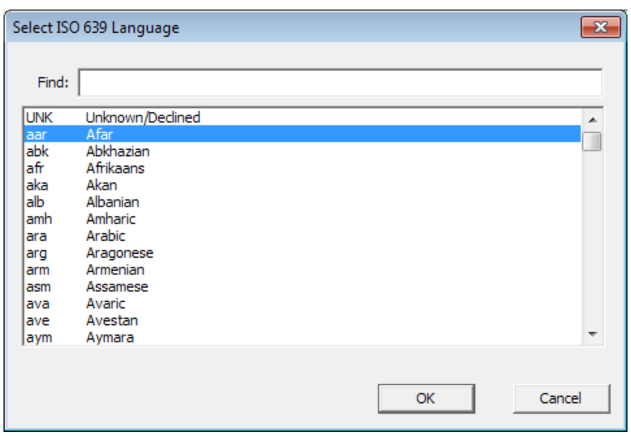
1. In the **Practice Definitions** dialog box, from the **Definition Type** list, select **Language Category**.
2. To edit a definition, select that definition, and then click **Edit**.

   The **Edit Language Category** dialog box appears.



   Note: Any changes will affect all instances of this language that have been assigned to patients. Proceed to the next step.

3. Next to **Code**, click **Search** to search for and select a standard language as defined by the ISO 639 standard to associate with the language, and then click **OK**. (To clear an existing selection because you do not want to associate the language with the ISO 639 standard, click **Clear**.)



4. Click **Use ISO Code Name** to insert the standard description for the language in the **Description** field. You can edit the **Description** as needed.
5. Enter a new or edit the existing **Description** for the ethnicity. This field has a limit of 50 characters.
6. Click **OK**.

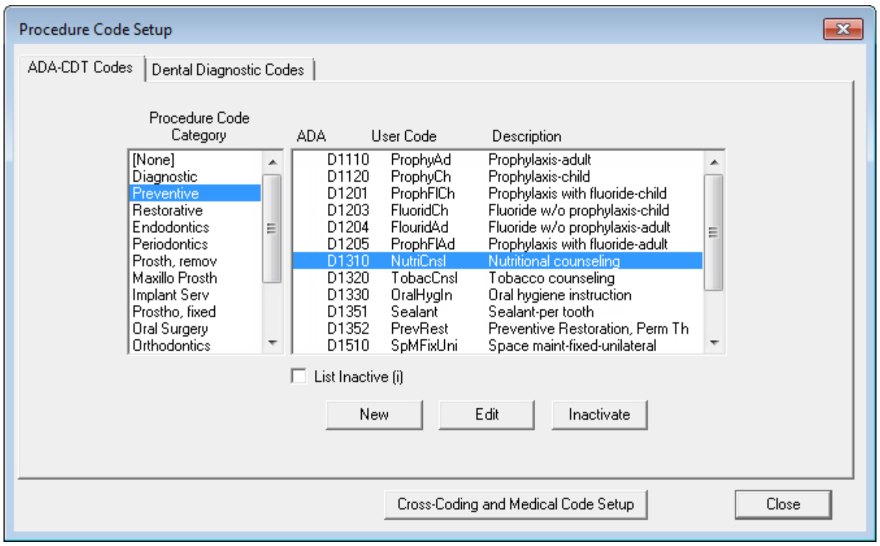
Inactivating and reactivating ADA-CDT dental codes

You can now inactivate the procedure codes that you do not want to post in your practice. You cannot inactivate a procedure code that is in use (such as in an insurance plan's payment table). An inactive procedure code is not available throughout Dentrix Enterprise for any clinic. Inactivating a procedure code is not permanent; you can reactivate any inactive procedure code as needed.

To inactivate a dental code

1. In the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Procedure Code Setup**.

   The **Procedure Code Setup** dialog box appears. The **ADA-CDT Codes** tab is selected by default.



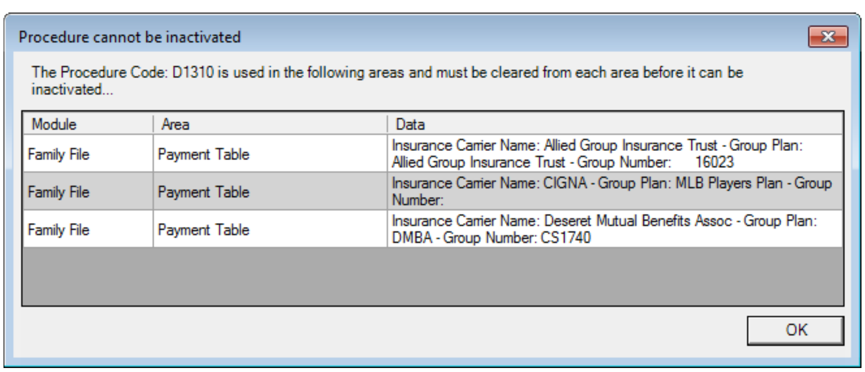
2. Select a category in the **Procedure Code Category** list box.

   All procedure codes associated with that category appear in the list box to the right.

3. Select the procedure code that you want to inactivate.
4. Click **Inactivate**.

   One of the following occurs:

   - If the procedure code is in use, the **Procedure cannot be inactivated** dialog box appears. Use the information shown as a reference to clear it from those areas of Dentrix Enterprise, and then attempt the inactivation again.



   - A confirmation message appears. Proceed to the next step.

5. Click **Yes** to confirm that you want to inactivate the procedure code.

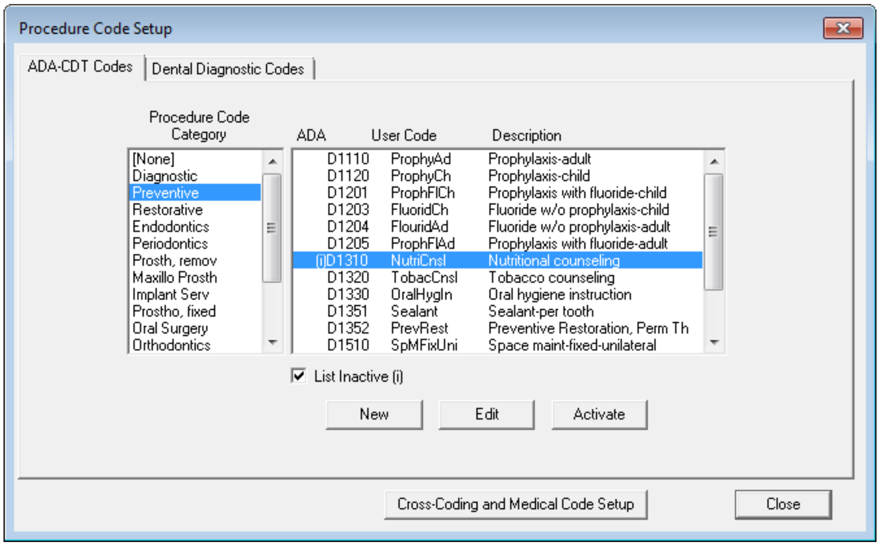
   A message appears, stating that the procedure code was inactivated.

6. Click **OK**.

To reactivate a dental code

1. In the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Procedure Code Setup**.

   The **Procedure Code Setup** dialog box appears. The **ADA-CDT Codes** tab is selected by default.



2. Select the **List Inactive (i)** check box to allow inactive procedures codes to be listed.
3. Select a category in the **Procedure Code Category** list box.

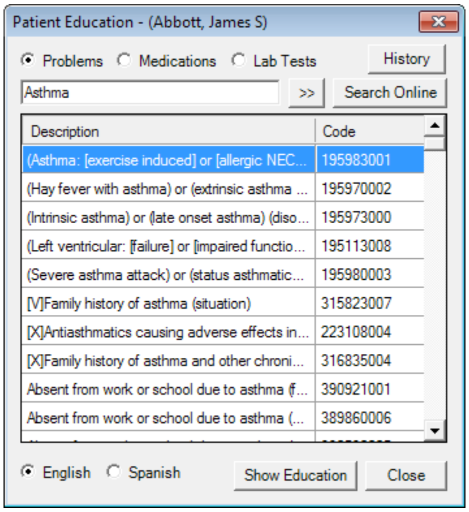
   All procedure codes associated with that category appear in the list box to the right.
4. Select the procedure code that you want to reactivate. Inactive procedure codes have “(i)” next to the **ADA** code.
5. Click **Activate**.

Sending a Link for a Patient Education Topic

After you view a patient education topic, in the **Record Patient Education** dialog box that appears, there is now a **Send link to portal** check box. With the check box selected, when you click **Record**, a message with the specified URL is sent to the patient's Updox portal.

To view a patient education topic

1. In the **Patient Education** dialog box, select a category: **Problems**, **Medications**, or **Lab Tests**.

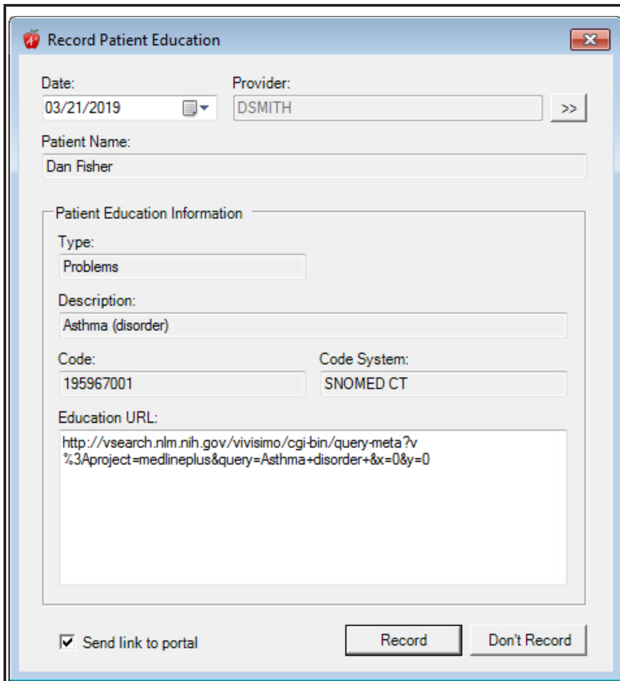
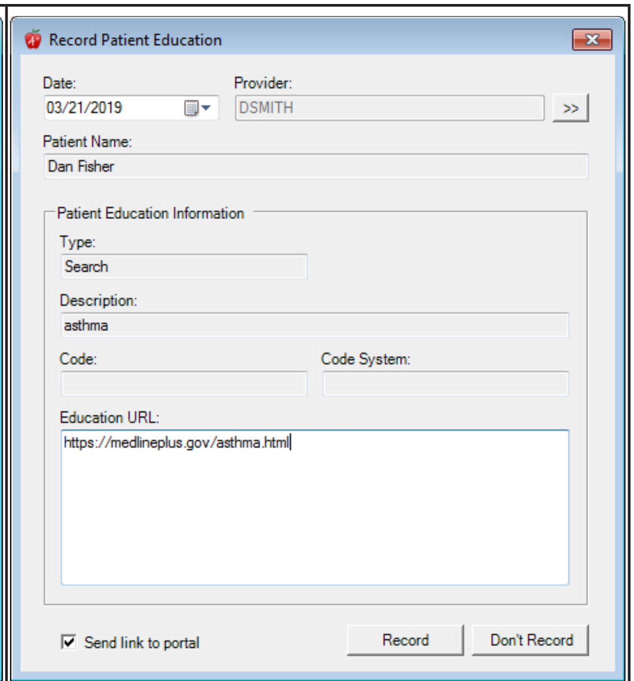


2. Do one of the following:
   - Type all or part of the description or code for a topic that you want to view, and then click the search button  to view a list of topics that match your search criteria. Proceed to the next step.
   - Type the words that you want to search for, and then click **Search Online** to browse topics on the MedlinePlus Connect website that match your search criteria. Skip to step 6.

   Note: The search field allows for dashes (-).

3. Select the topic that you want to view.
4. Select whether you want to view the selected topic in **English** or **Spanish**. The default selection is determined by the patient's selected language and a clinic setting.
5. Click **Show Education**.

   The MedlinePlus website opens in a browser window and displays the patient topics that match either the description or code (according to a certain clinic setting) of the selected topic.
6. In the **Record Patient Education** dialog box, change the **Date**, change the **Provider**, and/or change or enter the **Education URL** as needed.

	
Show education (for selected topic)	Online search

7. If there is text in the **Education URL** box, select or clear the **Send link to portal** check box to send or not to send a message to the patient's Updox portal. If the **Education URL** box is empty, make sure the **Send to link portal** check box is clear, or else an error message will appear and state that the message could not be sent.
8. Click **Record** to record that you provided the patient with education resources.
9. If the **Send link to portal** check box was selected, and the message was sent successfully, a message appears. Click **OK**.

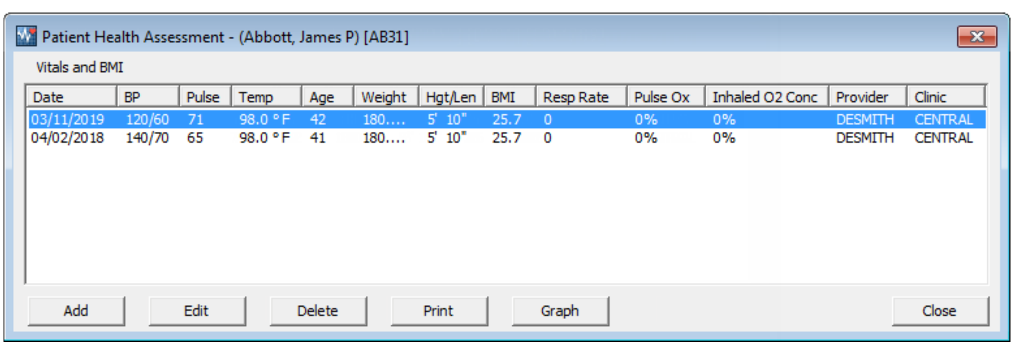
Entering Patient Health Assessments

There are additional vitals that you can include in an assessment. The new vitals appear in clinical notes that are generated automatically as the result of adding an assessment as part of completing a medical history review. You can also use the new vitals to create a global alert.

To enter a health assessment

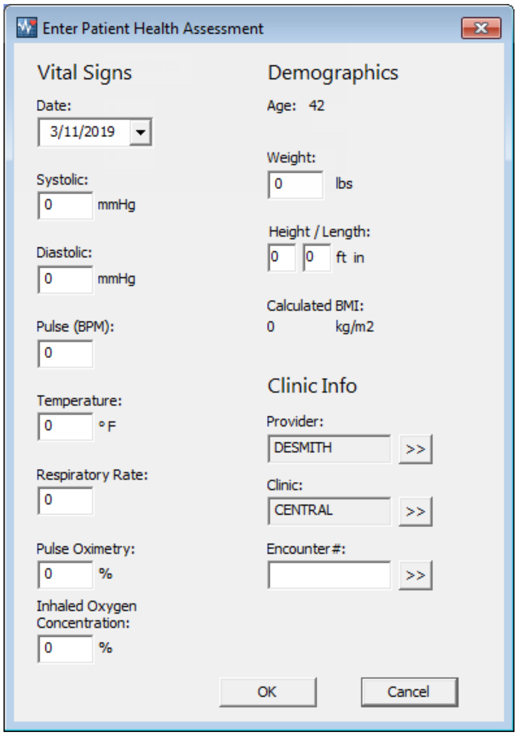
1. With a patient selected in the Patient Chart, on the **File** menu, click **Patient Health Assessment**.

   The **Patient Health Assessment** dialog box appears.



2. Click **Add** to add a new entry.

   The **Enter Patient Health Assessment** dialog box appears.



3. Enter the following vital statistics:
   - **Date** – The current system date appears by default, but you can enter a different date if necessary.
   - **Blood pressure** – The **Systolic** and **Diastolic** values of the patient's blood pressure.
   - **Pulse** – The patient's pulse rate in beats per minute.
   - **Temperature** – The patient's temperature in the selected unit of measure (Fahrenheit is the default).
   - **Respiratory Rate** – The number of breaths that the patient takes per minute.
   - **Pulse Oximetry** – The patient's oxygen level as a percentage.
   - **Inhaled Oxygen Concentration** – The percent of oxygen that the patient inhales.
   - **Age** – The patient's age in years as entered in the Family File appears automatically and cannot be edited in this dialog box.
   - **Weight** – The patient's weight in the selected unit of measure (pounds is the default).
   - **Height/Length** – The patient's height in the selected units of measure (feet and inches is the default).
   - **Calculated BMI** – The patient's body mass index as calculated from the weight and height entered appears automatically.
   - **Provider** – Leave the provider for the charting session selected, or click the search button >> to select a different provider.
   - **Clinic** – Leave the clinic for the charting session selected, or click the search button >> to select a different clinic.
   - **Encounter #** – Enter an encounter number, or click the search button >> to select one.
4. Click **OK**.

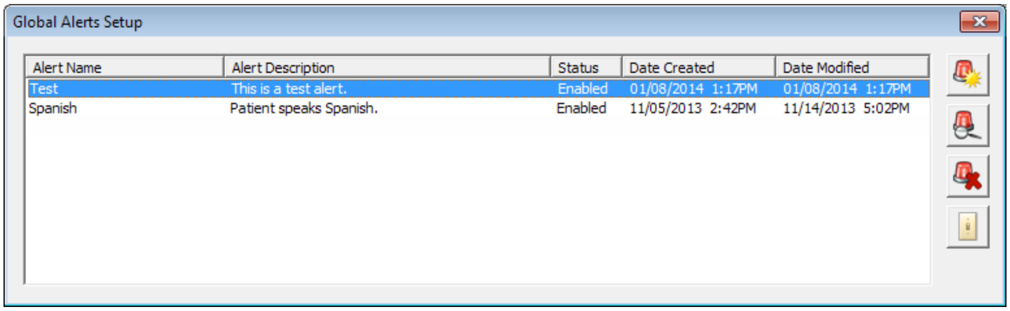
Adding Resources to Global Alerts

You can now add diagnostic and therapeutic resources to a global alert.

To add a resource to a global alert

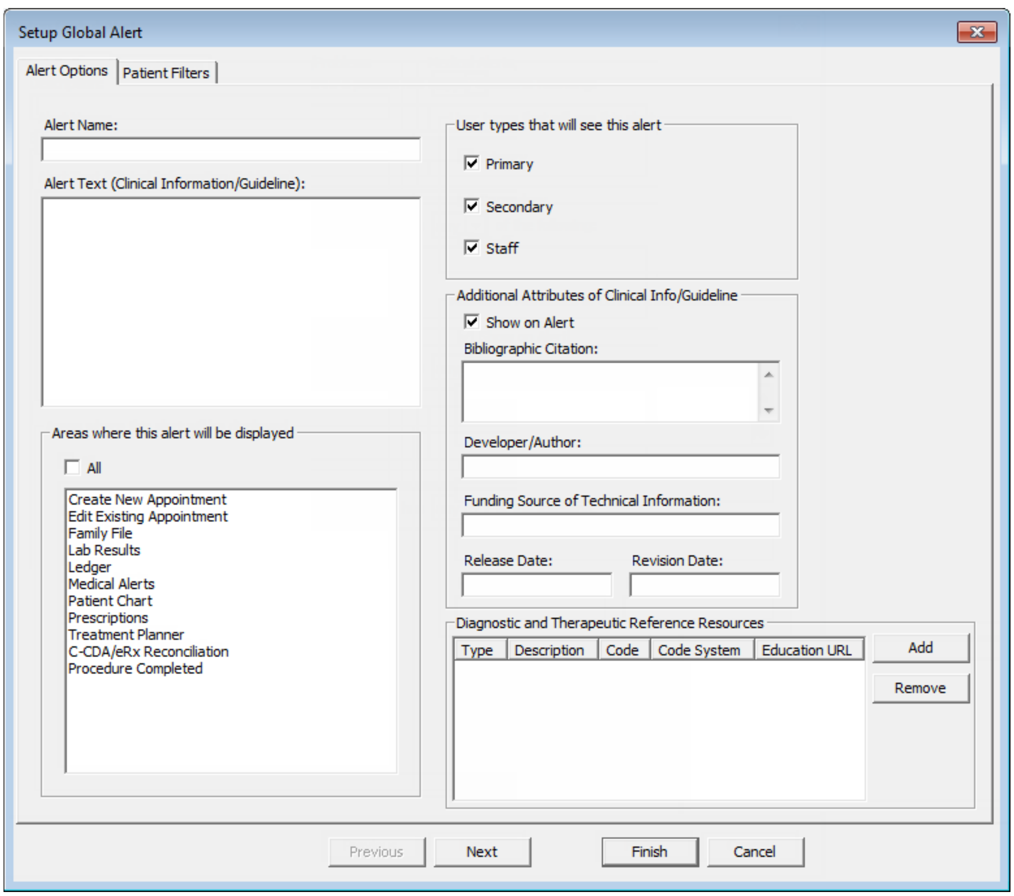
1. In the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Global Alerts Setup**.

   The **Global Alerts Setup** dialog box appears.

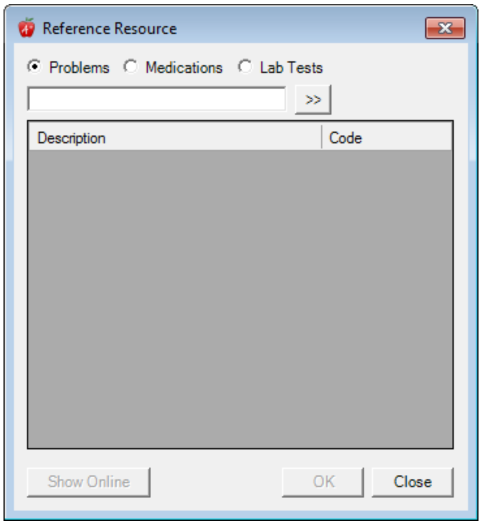


2. To edit an existing global alert, select that alert, and then click the **View/Edit Global Alert** button.

   The **Setup Global Alert** dialog box appears. The **Alert Options** tab is selected by default.



3. To add a resource that you want to include on the alert, under **Diagnostic and Therapeutic Reference Resources**, click **Add**, search for and select the problem, medication, or lab test, and then click **OK**.



Note: To remove a resource from the **Diagnostic and Therapeutic Reference Resources** list, select it, and then click **Remove**.

4. Click **Finish**.

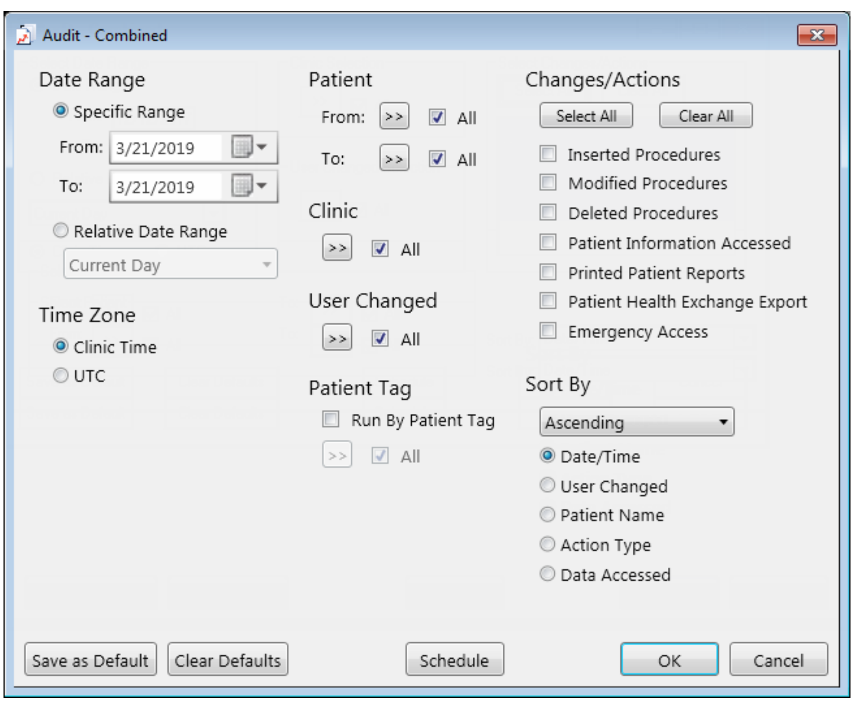
Tracking Emergency Access

An entry for a user being granted emergency access to a patient's record can now appear on the Audit-Combined Report or the Patient Information Accessed Report.

To generate the Audit-Combined Report

1. In DXOne Reporting, select **Audit**, and then double-click **Audit - Combined**.

   The **Audit - Combined** dialog box appears.



2. Under **Changes/Actions**, select the **Emergency Access** check box to include that action on the report.
3. Set up the other options as needed.

4. Click **OK**.

On the report, an entry for emergency access will have "Emergency Access" in the **Action Type** column.

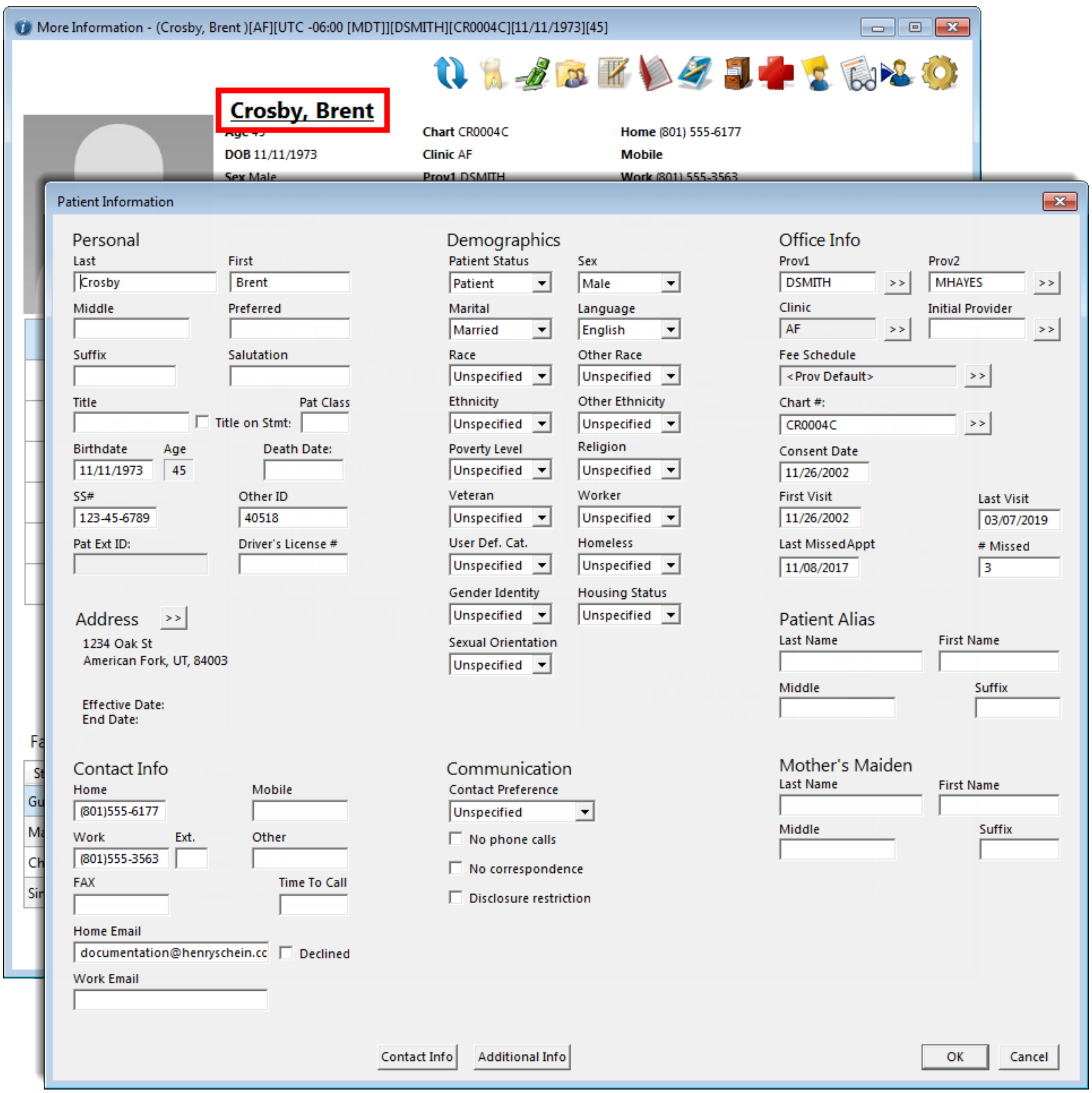
To generate the Patient Information Accessed Report

1. In DXOne Reporting, select **Audit**, and then double-click **Patient Information Accessed**.
2. In the **Patient Information Accessed** dialog box, set up the options as in previous version of Dentrix Enterprise.
3. Click **OK**.

On the report, an entry for emergency access will have "Emergency Access" in the **Status** column.

Editing Patient Information

In the **More Information** window, the patient's name is now a link that you can click to open the **Patient Information** dialog box so that you can edit the patient's information without having to open the patient's Family File.

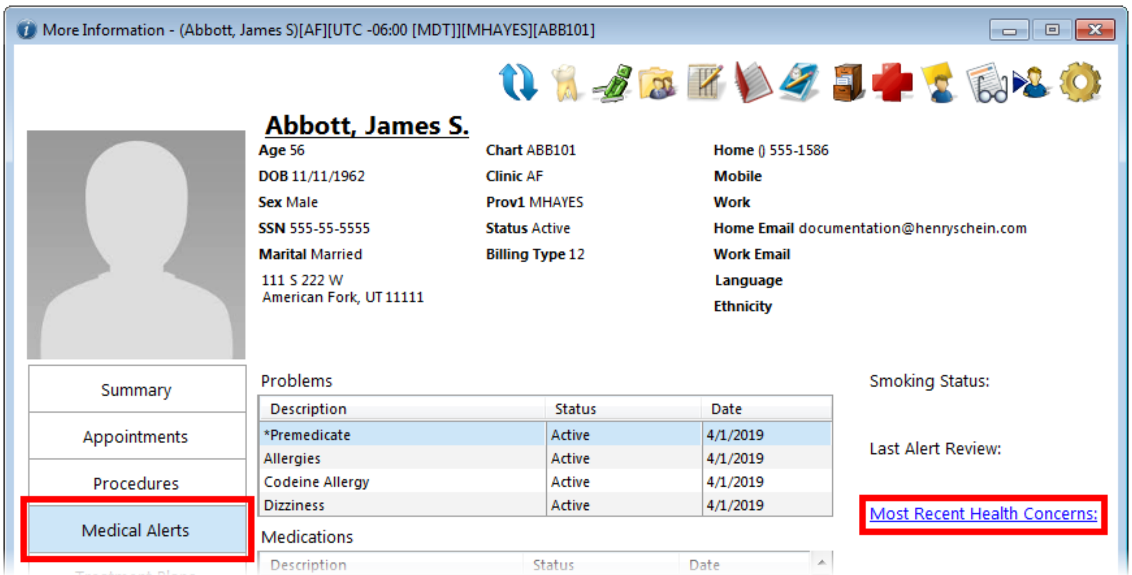


Entering a Patient’s Health Concerns

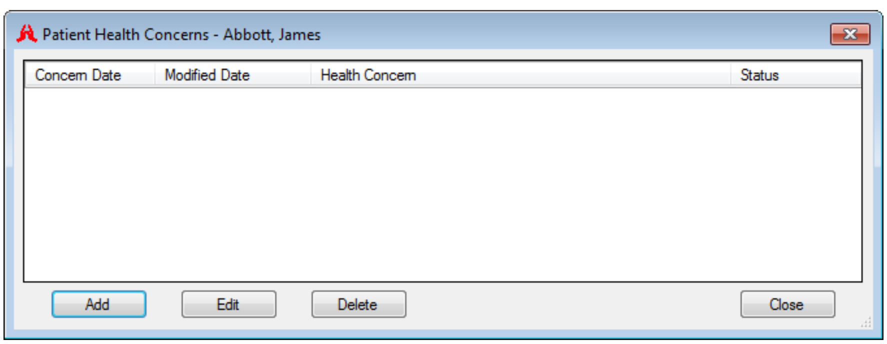
You can now enter, edit, and delete health concerns that a patient has expressed. A health concern is different from a diagnosed problem in that it is something that the patient suspects from his or her own observation or personal research. You can log the concern so that you can remember to consider it while examining or treating the patient.

To enter a health concern

1. In the **More Information** window, on the Medical Alerts tab, click the Most Recent Health Concerns link.

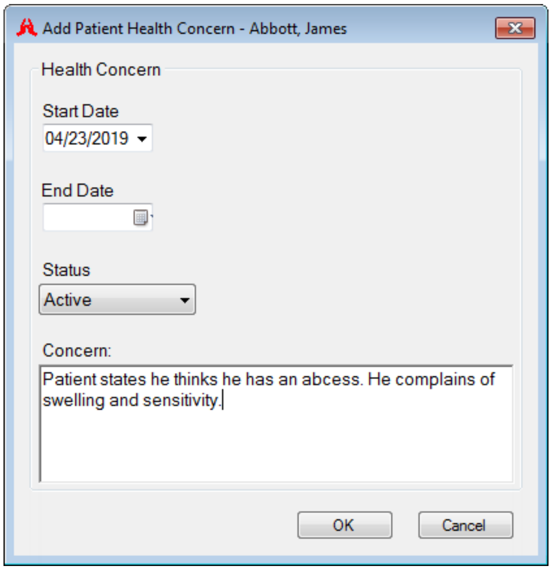


The **Patient Health Concerns** dialog box appears.



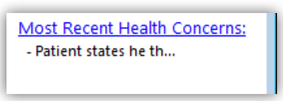
2. Click **Add**.

   The **Add Patient Health Concern** dialog box appears.



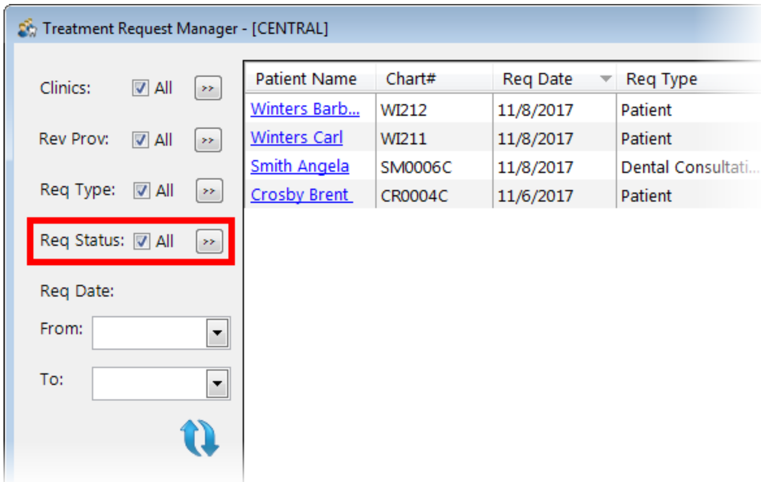
3. Set up the following options:
   - **Start Date** – The date the patient reports that the problem or concern started. The default is today.
   - **End Date** – The date that the problem or concern ended, such as when the patient reports that the pain went away on its own or when you treated the problem.
   - **Status** – Whether the concern is active or not. The default is Active.
   - **Concern** – The problem or concern that the patient reports.
4. Click **OK**.
5. In the **Patient Health Conerns** dialog box, click **Close** to return to the **More Information** window.

Note: The first part of the text of each recent conern appears under the **Most Recent Health Concerns** link.



Filtering the Treatment Request List

You can now filter the list of treatment requests that appear in the Treatment Request Manager by statuses.



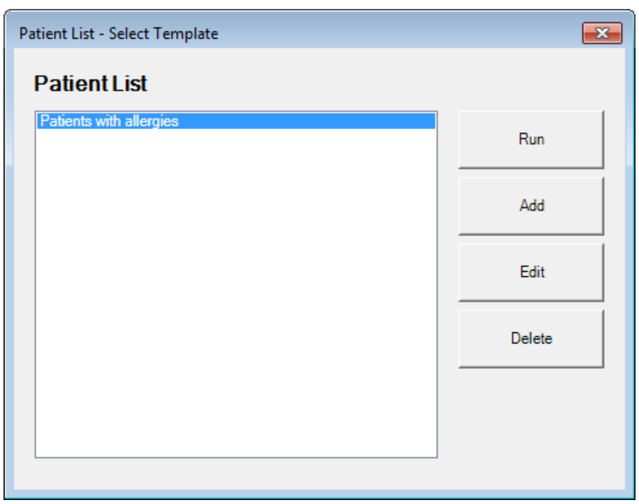
Generating the Patient List

You can now save a set of filters and data fields as a template to quickly generate a list of patients that match that criteria. Also, you can now include patient tags and billing types as data fields of the generated list.

To view the Patient List

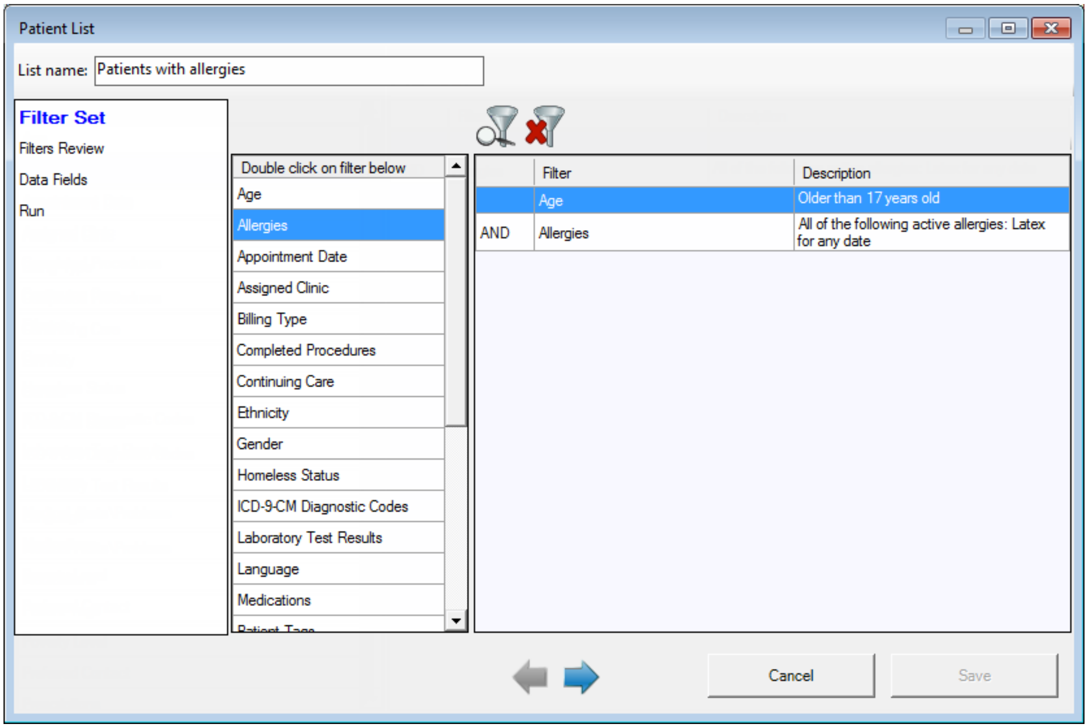
1. In the Office Manager, from the **Analysis** menu, click **Patient List**.

   The **Patient List - Select Template** dialog box appears.



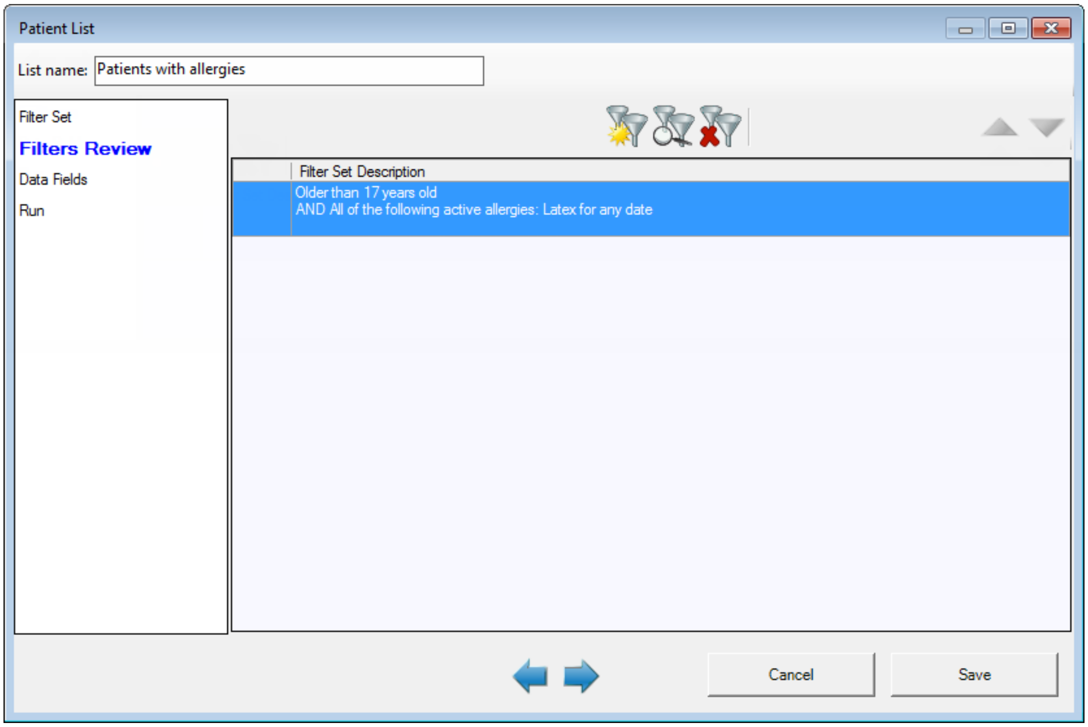
2. Do one of the following:
   - **Add a template** – To create a new template for generating a patient list, click **Add**. If there are no template, this is the only option that is available.
   - **Edit a template** – To edit an existing template, select it, and then click **Edit**.
   - **Delete a template** – To delete a template, select it, and then click **Delete**. Ignore the steps that follow.
   - **Run a template** – To generate a patient list from an existing template, select it, and then click **Run**. Ignore the steps that follow.

The **Patient List** dialog box appears.



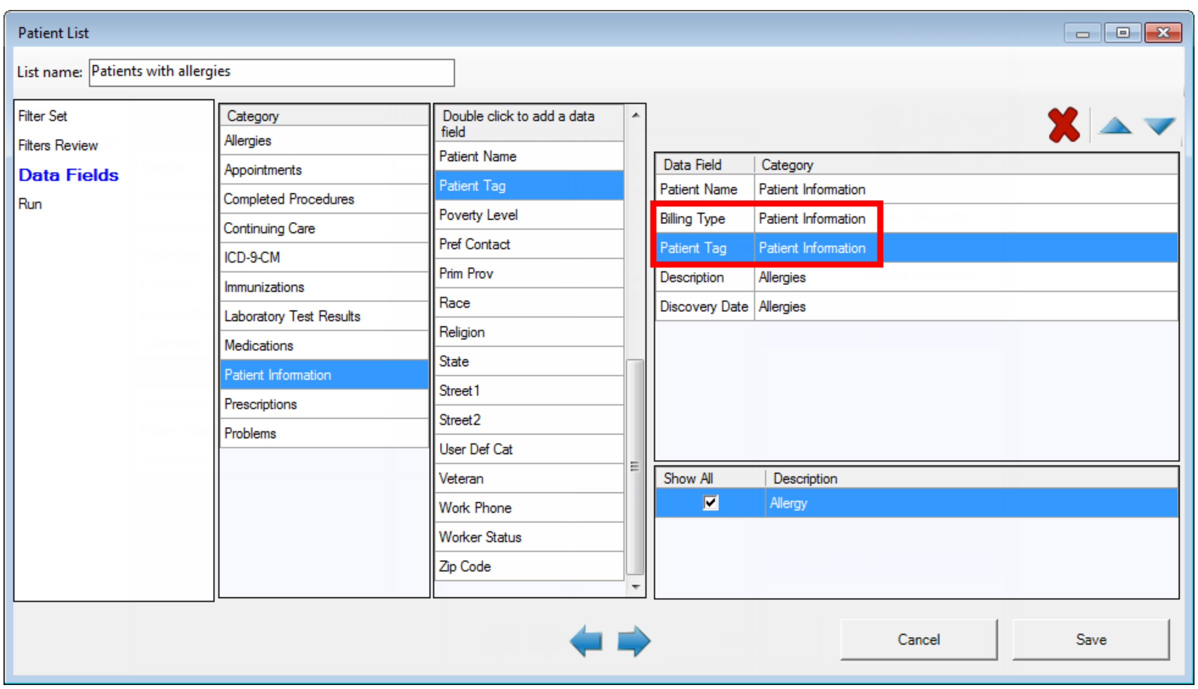
3. In the **List name** box, enter a name to use for the template so that you can quickly generate this list again, using the filters and data fields that you will specify.
4. For as many filters as you want to set up, under **Double click on filter below**, double-click each desired item to specify the criteria of that filter in the dialog box that appears (the name depends on the filter that you double-click). The following filters are available:
   - Age
   - Allergies
   - Appointment Date
   - Assigned Clinic
   - Billing Type
   - Completed Procedures
   - Continuing Care
   - Ethnicity
   - Gender
   - Homeless Status
   - ICD-9-CM Diagnostic Codes
   - Laboratory Test Results
   - Language
   - Medications
   - Patient Tags
   - Poverty Level
   - Preferred Contact
   - Prescriptions
   - Primary Provider
   - Problems
   - Race
   - Religion
   - User Defined Category
   - Veteran
   - Worker Status
5. Click the **Next** button .

   The next screen appears.



6. Add any additional filter sets (click the **Add Filter Set** button, and then repeat steps 4 - 5). Then, click the **Next** button.

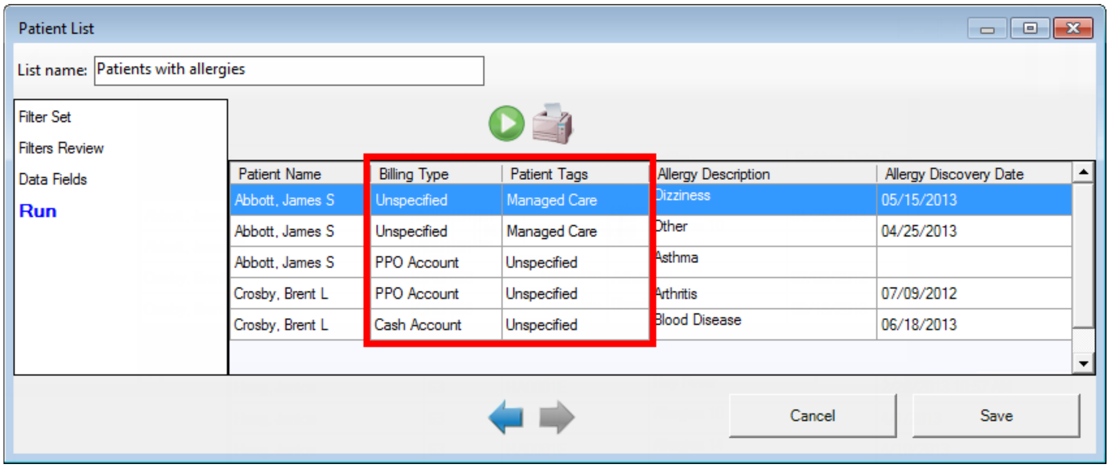
   The next screen appears.



Note: If a data field specifically has the ability to show all records for a given data field regardless of the applied, corresponding filters, the data field will appear in the lower-right corner with a **Show All** check box that may be selected to show all records pertaining to the specific data field type for a patient. Only certain data fields can allow this functionality.

7. Select the desired **Category**, and then double-click the data fields (under **Double click to add a data field**) that you want to include. (**Billing Type** and **Patient Tag** are new fields.) Repeat this step as needed to add other data fields. Then, click the **Next** button.

   The next screen appears and displays the results.



8. Click **Save** to save the list settings as a template for generating the list again later. On the message that appears, stating that the template was saved successfully, click **OK**.

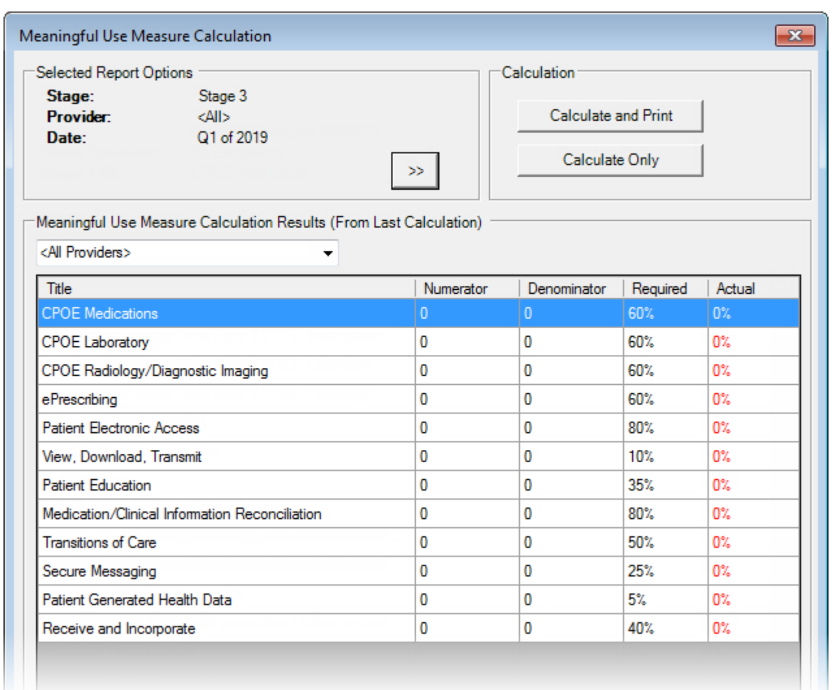
Reporting for Stage 3 Meaningful Use

You can now generate the Meaningful Use Measure Calculation List for the stage 3 measures.

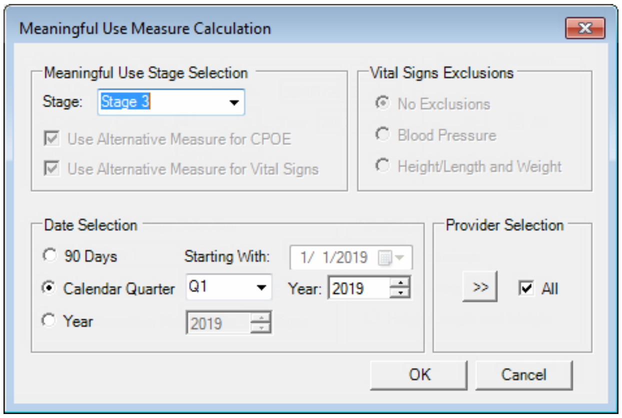
To run the Meaningful Use Measure Calculation List

1. In the Office Manager, from the **Analysis** menu, point to **Meaningful Use**, and then click **Meaningful Use Measure Calculation**.

   The **Meaningful Use Measure Calculation** dialog box appears.



2. Under **Selected Report Options**, click the search button  to select the criteria for the calculations that will be used for the report.



3. Select **Stage 3** from the **Stage** list.
4. Set up the other options as needed.
5. Click **OK**.
6. Under **Calculation**, click **Calculate and Print** or **Calculate Only**.

Selecting Patients

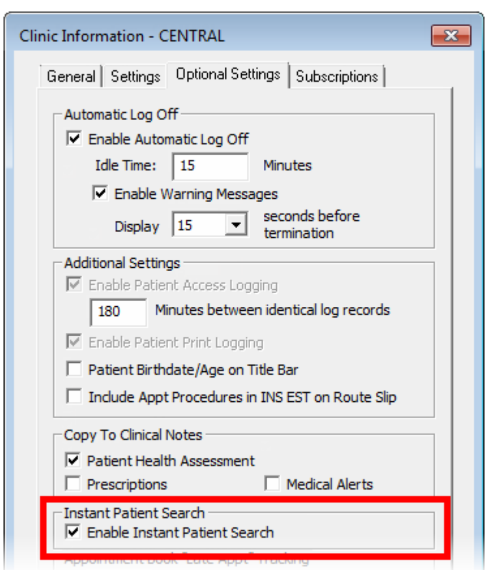
There is a new clinic setting that determines, when you are searching for a patient, whether Dentrix Enterprise automatically displays matches as you type your search criteria, or you have to enter your search criteria and then click **Search** to view matches.

To change the clinic setting

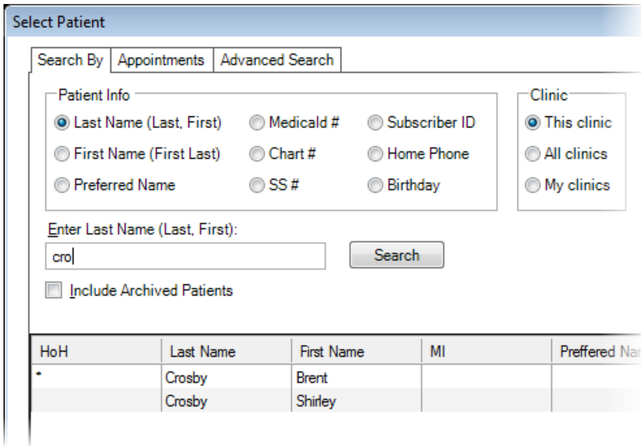
1. While logged in to the Central clinic, in the Office Manager, from the **Maintenance** menu, point to **Practice Setup**, and then click **Clinic Resource Setup**.

   The **Clinic Resource Setup** dialog box appears.
2. Under **Clinic Information**, click **Edit**.

   The **Clinic Information** dialog box appears.



3. On the **Optional Settings** tab, select or clear the **Enable Instant Patient Search** check box. With this check box selected, when you are searching for a patient, after you enter the first few characters of your search criteria, Dentrix Enterprise automatically displays matches and updates the list of matches as you type. With this check box clear, when you are searching for a patient, after you enter your search criteria, you must click **Search** to view the matches.



4. Click **OK**.

How to Learn More About This Release

For complete information on how to use the new features in this release, refer to the Dentrix Enterprise Help. You can also find information from this guide in the "What's New in Dentrix Enterprise 11.0?" section of the Dentrix Enterprise Help.

You can view on-demand product training videos, download PDF copies of product manuals (such as the Reports Reference, User's Guide, and System Requirements), and search the support knowledgebase for troubleshooting tips and answers to common questions in the Resource Center at www.dentrixenterprise.com/support/resource-center if you have an active customer service plan.