FRONT OFFICE

Continuing Care Test Blueprint

- Continuing Care Setup & Maintenance
- Continuing Care Correspondence
- Office Journal

HENRY SCHEIN® ONE | DENTRIX® Mastery Tracks

Overview

Who should take the Continuing Care test?

- Team members who manage patient information, including continuing care
- Scheduling or continuing care coordinators
- Hygiene staff who manage their own patients' continuing care
- Dental assistants who schedule continuing care appointments
- Anyone who wants to understand how continuing care is set up and managed in Dentrix

What's on the test?

The test for continuing care (also known as recall or recare) addresses skills in three areas. They are listed here, with an approximate percentage of how much they are represented in the test.

- Continuing Care Setup & Maintenance (60%)
- Continuing Care Correspondence (25%)
- Office Journal (15%)

Number of questions: 34
Time limit: 50 minutes
Passing score: 82%

How can I prepare for the test?

The skills and tasks related to this test are listed below. Please review them to help you understand and prepare for items on the test. Note tasks that you are unfamiliar with, then study them. For online study resources, training opportunities and a program overview, read the Mastery Tracks Web site.

How does the continuing care test fit in Dentrix Mastery Tracks?

The continuing care test, along with the scheduling and patient information tests, make up the front office mastery track. Successfully completing the three tests brings you the recognition and benefits of being a Dentrix Front Office Specialist.

Continuing Care Setup & Maintenance Skill Summary (60% of test)

The continuing care setup & maintenance portion of the test addresses competence in the following Dentrix skills:

- Setting up continuing care
- Assigning patients to a continuing care plan
- Scheduling continuing care appointments
- Completing continuing care appointments
- Using the Continuing Care module
- Generating continuing care reports

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

A. **Setting up continuing care**
   1. Add and edit continuing care statuses
   2. Add, edit, and delete continuing care types
      a. Add, edit, and delete names and descriptions
      b. Select initial status, interval, provider, default appointment time, and display color
      c. Identify the purpose of the default appointment time
      d. Identify the correct meaning of the provider options
      e. Identify the conditions for deleting a continuing care type
   3. Attach continuing care types to procedure codes
      a. Attach a type to a single procedure code
      b. Given a scenario, identify the conflict created when a single procedure code is needed to update more than one continuing care type
      c. Create a workaround code and attach it to a continuing care type
      d. Attach patients to multiple continuing care types
   4. Add, edit, and delete continuing care views
      a. Add, edit, and delete view names
      b. Select filters to generate an appropriate view, including: status, appointment status, due date, billing types, prior treatment date span, last visit date span, and providers
      c. Set the sort order
      d. Given a scenario, identify the correct range of dates that will be displayed in the view

   5. Set up the Practice Advisor
      a. Assign providers as dentist or hygienist
      b. Set continuing care benchmarks

B. **Assigning patients to a continuing care plan**
   1. Add, edit, and clear continuing care types attached to a patient in the Family File
      a. Select type, status, and provider
      b. Set due date, prior treatment date, and default appointment time
      c. Identify where motivational notes appear in Dentrix
      d. Save changes as default settings

C. **Scheduling continuing care appointments**
   1. Attach a type to an appointment
   2. Select an appointment reason
   3. Break a continuing care appointment

D. **Completing continuing care appointments**
   1. Set an appointment complete
   2. Schedule next appointment

E. **Using the Continuing Care module**
   1. Identify the difference between creating a view in the Continuing Care module compared to creating a view in the Office Manager
   2. Set up temporary Continuing Care module views
      a. Add, edit, and delete view names
      b. Select sort order
      c. Select filters to generate an appropriate view, including: status, appointment status, due date, billing types, prior treatment date span, last visit date span, and providers
   3. Select a view
   4. Set the start date for the view
   5. Schedule an appointment from the Continuing Care module
   6. Add, edit, and clear patient continuing care types attached to a patient
   7. Print the Continuing Care List
   8. Copy Continuing Care module data to the Windows clipboard
   9. Change continuing care statuses from the Continuing Care module
   10. Open the Office Journal module
   11. Identify the location in Dentrix where you can generate the Continuing Care module to filter all patients

F. **Generating continuing care reports**
   1. Generate the Continuing Care section of the Practice Advisor Report
   2. Identify which Dentrix reports provide continuing care statistics for the practice

Continuing Care Correspondence Skill Summary (25% of test)

The continuing care correspondence portion of the test addresses competence in the following Dentrix skills:

- Setting up Continuing Care correspondence
- Corresponding with patients using Letter Merge
- Printing continuing care labels
- Contacting patients using the Continuing Care List
- Confirming continuing care appointments

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

A. **Setting up Continuing Care correspondence**
   1. Customize continuing care cards and letters
      a. Insert graphics into an existing continuing care template
      b. Edit font characteristics in an existing continuing care template
      c. Edit text in an existing continuing care template
      d. Identify the function of merge data fields in a continuing care template
      e. Identify the consequences of removing a merge data field in an existing continuing care template

B. **Corresponding with patients using the Letter Merge feature**
   1. Generate continuing care due reminder postcards
   2. Generate continuing care appointment reminder postcards
   3. Generate inactive patient letters

C. **Printing continuing care labels**
   1. Print a patient mailing Quick Label
   2. Print mailing labels from the Continuing Care module

D. **Contacting patients using the Continuing Care List to make phone calls**
   1. View the Continuing Care List to make continuing care due reminder phone calls
   2. Change a status to reflect contact by the office
   3. Schedule a continuing care appointment from the Continuing Care List

E. **Confirming continuing care appointments**
   1. Set an appointment status

Office Journal Skill Summary (15% of test)

The Office Journal portion of the test addresses competence in the following Dentrix skills:

- Understanding the Office Journal Window
- Setting up the Office Journal
- Accessing the Office Journal
- Viewing Office Journal Entries
- Creating manual entries
- Using the Office Journal for daily reminders
- Printing the Office Journal

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

A. **Understanding the Office Journal Window**
   1. Identify the different areas of the Office Journal, including contact tree, display panel, and toolbar
   2. Identify the different contact types that are automatically added to the Office Journal, including scheduled appointments, purged appointments, broken appointments, archived patient information, billing statements, DXWeb communications, HIPAA Privacy requests, letters, payment agreement notes, perio letters, referral recaps, and referral slips
   3. Identify the purpose of the four different manual Office Journal entry types, including phone calls, reminders, miscellaneous, and HIPAA Privacy
   4. Identify the meaning of the different symbols in the Office Journal

B. **Setting up the Office Journal**
   1. Set up practice resources
      a. Add, edit, and inactivate providers
      b. Add, edit, and inactivate staff members
   2. Set up Office Journal Preferences
      a. Select automatically launch Office Journal option
   3. Customize the Office Journal display
      a. Select Journal Entry types
      b. Select Provider/Staff
      c. Enter Entries Dated After date
      d. Select Save as Default

C. **Accessing the Office Journal**
   1. Open the Office Journal to view patient/family information
   2. Open the Office Journal to view provider/staff information
   3. Open the Office Journal to view referral information

D. **Viewing Office Journal Entries**
   1. Select View options
      a. Switch between patient and family views
      b. Expand and collapse the contact tree
      c. Activate and deactivate the Show Information option

E. **Creating manual entries**
   1. Add a manual Office Journal entry
      a. Given a scenario, select the appropriate type
      b. Select Prov/Staff
      c. Edit date and time if appropriate
      d. Enter a description
      e. Enter a note
   2. Edit a manual Office Journal entry
   3. Delete a manual Office Journal entry
      a. Identify the conditions that would prevent you from deleting an Office Journal entry

F. **Using the Office Journal for daily reminders**
   1. Add a reminder for a patient
   2. Add a reminder for a staff/provider

G. **Printing the Office Journal**