



Scheduling Essentials Test Blueprint

- ✓ Scheduling
- ✓ Continuing Care
- ✓ Office Journal



Overview

Who should take this Scheduling Essentials test?

- Dentrrix users with less than a year experience with Dentrrix, or that have a limited role with scheduling.
- Team members who manage appointment scheduling, including continuing care (recall)
- Anyone who wants to understand how appointments are set up and managed in Dentrrix

What's on the test?

The test for scheduling essentials addresses skills in three areas. They are listed here, with an approximate percentage of how much they are represented in the certificate test:

- Scheduling (65%)
- Continuing Care (30%)
- Office Journal (5%)

Number of questions: 18

Time limit: 30 minutes

Passing score: 77%

How can I use this blueprint to 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, visit the Mastery Tracks website.



Overview (continued)

How does this test fit in Dentrax Essentials?

The Scheduling Essentials test is one of four tests in Dentrax Essentials:

- Clinical Essentials
- Financial Essentials
- Patient Information Essentials
- Scheduling Essentials

Successfully completing this test means you can do basic tasks associated with using Dentrax in a scheduling environment. You can also take the other tests to measure your basic skills in other Dentrax functions in the dental office.



Scheduling (65% of test)

The scheduling portion of the test addresses competence in the following Dentrax skills:

- Modifying default Appointment Book hours
- Setting up flip tabs
- Working with Appointment Book views
- Understanding the Appointment Book window
- Finding available appointment times
- Locating existing appointments
- Scheduling appointments
- Scheduling events
- Rescheduling appointments
- Deleting appointments
- Setting appointments complete
- Accessing and modifying patient information
- Printing Scheduling Forms
- Using the ASAP/Open List
- Using the Unscheduled List

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

A. Modifying default Appointment Book hours

1. Modify default practice hours
 - a. Edit and reset the practice hours for a specific day
 - b. Close and open the practice on a specific day
 - c. Set and delete a practice yearly holiday
2. Modify default provider hours
 - a. Edit and reset a provider's hours for a specific day
 - b. Set and delete a provider vacation day



3. Edit and reset operatory hours for a specific day

B. Setting up flip tabs

1. Set up relative flip tabs
2. Set up absolute flip tabs

C. Working with Appointment Book views

1. Add, edit, and delete an Appointment Book view

D. Understanding the Appointment Book window

1. Identify the different areas and information indicated in the Appointment Book window, including the view date, operatory columns, navigation buttons, the Pinboard, the Flip Tab area, current time indicator, open and closed time indicators, provider time columns, and provider time blocks
2. Identify appointment symbols, including the new patient symbol, appointment note symbol, medical alert symbol, insurance eligibility symbol, lab case symbol, and patient alert symbol
3. Identify and read appointment information
4. Identify and read event information

E. Finding available appointment times

1. Use navigation controls to manually find an available appointment time
2. Use the Find New Appointment Time tool

F. Locating existing appointments

1. Identify a variety of ways to locate existing appointments
 - a. Use the Locate Existing Appointments button
 - b. Use the Other Appointments command to open the Family Appointment List
 - c. Use the More Info button/command

G. Scheduling Appointments

1. Identify the differences in scheduling initial, treatment planned, and continuing
 - a. care appointments for existing patients
2. Select an operatory, date, and time
 - a. Double-click on an available operatory, date, and time
 - b. Right-click on an available operatory, date, and time
 - c. Use the Find New Appointment Time tool
 - d. Use the Pinboard to drag and drop an appointment to a desired time
 - e. Manually enter an operatory, date, and time
3. Select a patient
 - a. Double-click on the appointment book
 - b. Right-click on the appointment book
 - c. Use the File menu Select Patient command
 - d. Use the File menu Current Patient command



- e. Use the Schedule Appointment button
 - 4. Add and modify appointment information
 - a. Select a provider
 - b. Attach and detach continuing care
 - c. Add and delete an appointment reason
 - i. Given a scenario, apply your knowledge of the use of the Initial, Tx, and Misc buttons to correctly select an appointment reason.
 - d. Modify the Appointment Description
 - e. Modify an appointment length
 - i. Modify time length
 - ii. Modify chair time, assistant time, and provider time
 - f. Modify an appointment amount
 - g. Select a staff member
 - h. Select an appointment status
 - i. Select a schedule type
 - j. Select an appointment type
 - k. Add, edit, and delete an appointment note
 - l. Use the appointment checklist
 - m. Indicate a lab case is connected to the appointment
 - 5. Schedule initial appointments for new patients
 - a. Use the New Patient button
 - b. Identify the difference in use and function between a new patient appointment and an existing patient appointment
 - 6. Use the Schd. Next button to schedule a series of appointments
 - a. Identify the function of the Schd. Next button
- ### H. Scheduling events
- 1. Select an operatory, date, and time
 - a. Right-click on a desired operatory, date, and time
 - b. Enter operatory, date, and time manually
 - c. Use the Pinboard to drag and drop an event to a desired operatory, date, and time
 - 2. Add and modify event information
 - a. Compare and contrast the use of the Schedule Event option to close an operatory and/or to schedule a provider's time
 - b. Select the Event Time
 - c. Select the Event Day(s)
 - d. Select operatories
 - e. Select display options
 - i. Center description
 - ii. Select color



- f. Add, edit, and delete an event note
 - I. Rescheduling appointments**
 - 1. Drag and drop an appointment
 - 2. Move appointments using the Pinboard
 - a. Reschedule a single appointment for a date
 - b. Reschedule all family appointments for a date
 - c. Reschedule all provider appointments for a date
 - d. Reschedule all operatory appointments for a date
 - e. Reschedule all appointments for a date
 - f. Use the Dentrix Pinboard List
 - i. Open the List
 - ii. Set View options
 - iii. Schedule an appointment from the list
 - iv. Delete an appointment or event from the Pinboard
 - v. Copy the list to the Windows clipboard
 - vi. Use the Auto Dial command
 - vii. Refresh the list
 - viii. Access appointment information by double-clicking on an appointment
 - 3. Edit the operatory, date, and time for an existing appointment
 - 4. Move an appointment to the Unscheduled List
 - a. Use the break appointment button
 - b. Use the wait/will call button
 - c. Identify the difference in purpose and consequence between using the break appointment and wait/will call buttons
 - 5. Print the Appointment History
 - J. Deleting appointments**
 - 1. Delete an individual appointment
 - a. Identify the difference between using the delete button and moving an appointment to the Unscheduled List in dealing with broken appointments
 - b. Identify circumstances where it would be appropriate to delete an appointment
 - 2. Purge appointments
 - K. Setting appointments complete**
 - 1. Complete an appointment



2. Restore an appointment that is accidentally set complete

L. Accessing and modifying patient information

1. Access patient information using the More Info button
 - a. Switch to another family member in the More Information dialog box
 - b. View a selected appointment in the Appointment Book
 - c. Open the Continuing Care module
 - d. Switch to the Ledger
 - e. Create an addressed email
 - f. Dial a phone number
 - g. Open the Office Journal
2. Switch to the Family File using the Patient info button
3. View the Family Appointment list using the Other Appt(s) button
 - a. View a selected appointment in the Appointment Book
 - b. Create a new appointment from the Family Appointment list
 - c. View information for another family member in the Family Appointment list
4. View and modify insurance claim information using the Ins Claim Info button
5. View and modify lab case information using the Patient Lab Cases button

M. Printing Scheduling forms

1. Print the Appointment Book
2. Print Route Slips
3. Print the Patient Visit form

N. Using the ASAP/Open List

1. Explain the use and function of the ASAP/Open List
2. Add and remove appointments from the list
3. Set View options
 - a. Explain the function and limitations of the Span of Search option
 - b. Explain the difference in use between the ASAP and Open Lists
4. Set the List start date
5. Reschedule and remove appointments from the List
 - a. Move appointments to the Pinboard
 - b. Edit the operatory, date, and time for an appointment
 - c. Delete appointments
6. Copy the List to the Windows clipboard
7. Refresh the List
8. Set appointment status for an appointment
9. Check insurance eligibility for a patient
10. Open the Office Journal
11. Access appointment information by double-clicking on an appointment
12. Print the ASAP or Open List from the Office Manager



O. Using the Unscheduled List

1. Explain the use and function of the Unscheduled List
2. Add patients to the list
 - a. Use the Break Appointment option
 - b. Use the Wait/Will Call option
 - c. Explain the difference in use and function between the two options
3. Set View options
4. Reschedule and remove appointments from the list
 - a. Move appointments to the Pinboard
 - b. Edit the operatory, date, and time for an appointment
 - c. Purge appointments
5. Contrast the use and function of the delete and purge appointment options
 - a. Copy the list to the Windows clipboard
 - b. Refresh the list
 - c. Check insurance eligibility for a patient
 - d. Open the Office Journal
 - e. Access appointment information by double-clicking on an appointment
 - f. Print the Unscheduled List from the Office Manager



Continuing Care (30% of test)

The continuing care 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

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. 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



B. Assigning patients to a continuing care plan

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

C. Scheduling continuing care appointments

1. Schedule continuing care appointments
 - a. Attach a type to an appointment
 - b. Select an appointment reason
 - c. 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
 - i. Add, edit, and delete view names
 - ii. Select sort order
 - iii. 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



Office Journal (5% of test)

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

- Accessing the Office Journal
- Viewing Office Journal entries
- Creating manual entries
- Using the Office Journal for daily reminders

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

A. 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

B. 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



C. 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

D. Using the Office Journal for daily reminders

1. Add a reminder for a patient
2. Add a reminder for a staff/provider