Scheduling Test Blueprint

- ✔ Appointment Correspondence
- ✔ Schedule Setup
- ✔ Appointment Scheduling
- ✔ Schedule Optimization
- ✔ Office Journal

Overview

Who should earn this Scheduling certificate?
- Team members who manage appointment scheduling or correspondence
- Anyone who wants to understand how appointments are set up and managed in Dentrix

What's on the test?
The test for scheduling addresses skills in five areas. They are listed here, with an approximate percentage of how much they are represented in the test.

- Appointment Correspondence (15%)
- Schedule Setup (20%)
- Appointment Scheduling (25%)
- Schedule Optimization (30%)
- Office Journal (10%)

Number of questions: 54
Time limit: 75 minutes
Passing score: 87%

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 scheduling test fit in Dentrix Mastery Tracks?
The scheduling test, along with the continuing care 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.

Appointment Correspondence
Skill Summary (15% of test)

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

- Setting up appointment correspondence
- Corresponding with patients using the eCentral Communications Manager
- Corresponding with patients using Letter Merge
- Printing appointment labels
- Communicating with patients using the Daily Appointment List
- Confirming 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 appointment correspondence**
  1. Set up postcard campaigns in the Communication Manager
      a. Edit and disable postcard campaigns
  2. Set up email campaigns
      a. Customize an email template
      b. Edit and disable email campaigns
  3. Set up text message campaigns
      a. Customize a text message template
      b. Add, edit, and delete text message campaigns
      c. Test a text message campaign
  4. Set appointment status defaults for text message and email communication
      a. Add, edit, and delete an appointment status
      b. Set up the Appointment Status Updater in eSync
  5. Exclude patients from receiving Communication Manager correspondence
  6. Set up the WebSync Wizard
      a. Enter login information
      b. Schedule the WebSync
      c. Add, edit, and delete correspondence criteria
      d. Set Correspondence options
      e. Customize appointment cards and letters in Microsoft Word

B. **Corresponding with patients using the eCentral Communication Manager**
   1. Send Communication Manager correspondence manually (outside of the WebSync)
   2. Check correspondence statistics in the eCentral Communication Manager
   3. Add and select a secondary email address for a patient

C. **Corresponding with patients using the Letter Merge feature**
   1. Generate appointment reminder postcards for existing patients
   2. Generate appointment reminder postcards for new patients

D. **Printing appointment labels**
   1. Print a patient mailing Quick Label
   2. Print an Appointment Reminder Quick Label
   3. Print a Selected Appt Reminder Quick Label

E. **Communicating with patients using the Daily Appointment List to make phone calls**
   1. Set the list date
   2. Set view options
   3. Reschedule appointments
   4. Copy the list to the Windows clipboard
   5. Set appointment status for an appointment
   6. Check insurance eligibility for a patient
   7. Open the Office Journal

F. **Confirming appointments**
   1. Set an appointment status from the Appointment Book
   2. Set an appointment status from the Daily Appointment List

Schedule Setup
Skill Summary (20% of test)

The schedule setup portion of the test addresses competence in the following Dentrix skills:

- Setting up practice resources
- Customizing practice definitions
- Setting up appointment time defaults
- Checking network settings
- Setting up operatories
- Setting up providers
- Modifying default Appointment Book hours
- Setting up global Appointment Book defaults
- Setting up workstation specific Appointment Book defaults
- Setting up flip tabs
- Working with Appointment Book views
- Setting up remote access to appointment information

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 practice resources**
   1. Add, edit, and delete operatories
   2. Select and modify provider operatory assignments
B. **Customizing practice definitions**
   1. Add, edit, and delete appointment statuses
   2. Add, edit, and delete appointment types
   3. Add, edit, and delete appointment checklist
   4. Add, edit, and delete appointment reasons
C. **Setting up appointment time defaults**
   1. Indicate chair, assistant, and provider time for procedure codes
   2. Indicate chair, assistant, and provider time for multi-codes
D. **Checking network settings**
   1. Explain the purpose and use of the appointment refresh speed
   2. Explain the purpose and use of the Disable Dynamic Appointment Refresh option

E. **Setting up operatories**
   1. Set operatory hours
   2. Select a default operatory

F. **Setting up providers**
   1. Set provider hours
   2. Add, edit, and delete time blocks
   3. Assign provider aliases
   4. Select a provider color

G. **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

H. **Setting up global Appointment Book defaults**
   1. Add, edit, and clear the practice hours
   2. Select Appointment Amount option
   3. Set schedule time increments
   4. Customize Hover details
   5. Set View Time at Right option

I. **Setting up workstation specific Appointment Book defaults**
   1. Select default appointment status
   2. Select default schedule type
   3. Select default appointment type
   4. Select screen colors
   5. Select button bar orientation
   6. Customize the display font
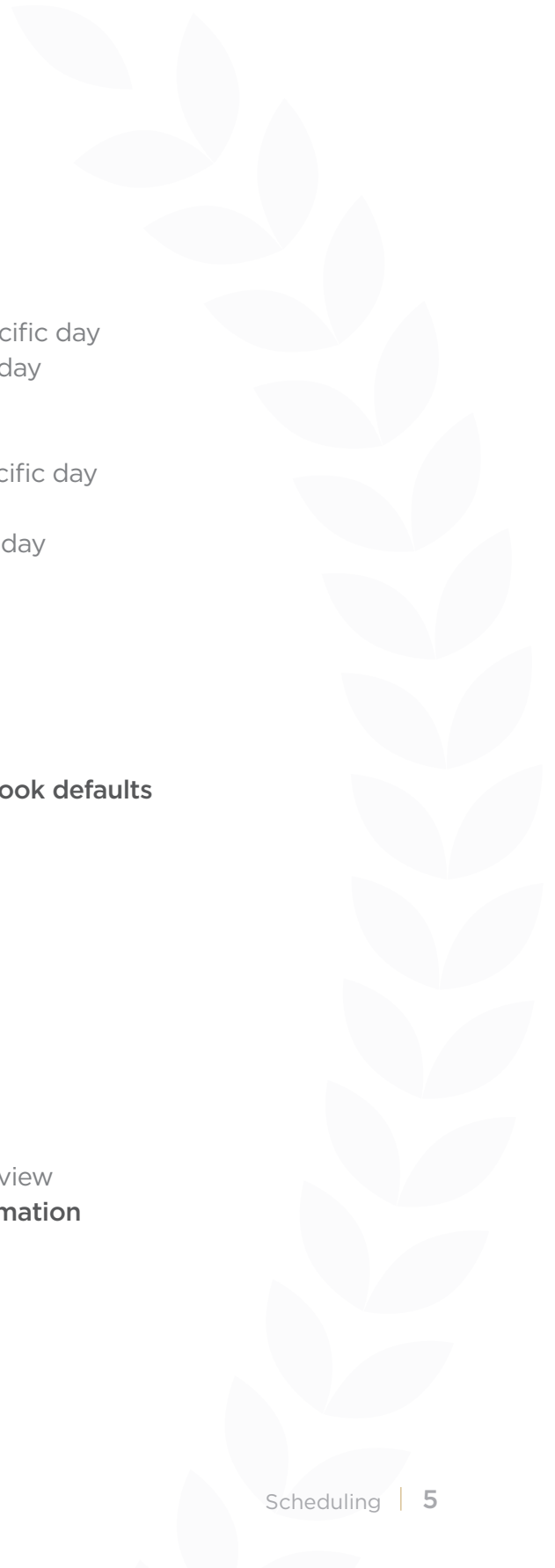
J. **Setting up flip tabs**
   1. Set up relative flip tabs
   2. Set up absolute flip tabs

K. **Working with Appointment Book views**
   1. Add, edit, and delete an Appointment Book view

L. **Setting up remote access to appointment information**
   1. Set up WebSync
     a. Enter user ID and password
     b. Set Correspondence options
   2. Upload All Patients
   3. Log in to Dentrix Mobile

Appointment Scheduling
Skill Summary (25% of test)

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

- Understanding the Appointment Book window
- Navigating the Appointment Book
- Using Appointment Book views
- Modifying default Appointment Book hours
- Finding available appointment times
- Locating existing appointments
- Scheduling appointments
- Scheduling events
- Rescheduling appointments
- Deleting appointments
- Setting appointments complete
- Using the Appointment Book day note
- Accessing and modifying patient information
- Generating appointment reports
- Viewing appointments while away from the office

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

A. 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

B. Navigating the Appointment Book
  1. Use the navigation buttons to move forwards and backwards
  2. Use the day, week and month views
  3. Use the Calendar button to jump to a day
  4. Use flip tabs to jump to a day

C. Using Appointment Book Views
  1. Add, edit and delete views
  2. Switch between views
  3. Demonstrate awareness that views are workstation specific

D. 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

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 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

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. Using the Appointment Book Day note
   1. Add, edit, and delete an Appointment Book Day note

M. 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

N. **Generating appointment reports**

    1. Generate the Appointment Book View report

        a. Create, modify, and delete report options

    2. Generate patient route slips

        a. Generate from the Appointment Book

        b. Generate in batch from the Office Manager

    3. Generate patient visit forms

    4. Generate the Daily Appointment List

        a. Use the interactive Appointment List

            i. Access the list

           ii. Set the list date

          iii. Set view options

          iv. Reschedule appointments

           v. Copy the list to the Windows clipboard

          vi. Set appointment status for an appointment

         vii. Check insurance eligibility for a patient

        viii. Open the Office Journal

        b. Generate the Daily Appointment List from the Office Manager

            i. Generate the Daily Appointment List

           ii. Generate an Operatory Appointment List

          iii. Generate a Family Appointment List

O. **Viewing appointments while away from the office**

    1. View appointments with Dentrix Mobile

        a. Access Dentrix Mobile

        b. View provider appointment lists

        c. View appointment details

    2. View appointments with the eCentral Appointment Manager

        a. Access the Appointment Manager

        b. View appointment list for current day

        c. View appointment list for selected day

        d. View appointments by provider

        e. Show or hide appointment details

        f. Confirm appointments from the Appointment Manager list

        g. Verify insurance eligibility from the Appointment Manager list

Schedule Optimization
Skill Summary (30% of test)

The schedule optimization portion of the test addresses competence in the following Dentrix skills:

- Using the ASAP/Open List
- Using the Unscheduled List
- Using the Treatment Manager List
- Setting up and Using Perfect Day scheduling
- Scheduling Benchmarks in the Practice Advisor
- Generating the Schedule Management section of the Practice Advisor Report
- Generating the Daily Huddle report
- Working with provider gross production goals
- Viewing production goals and production totals from the Appointment Book
- Tracking scheduling practices using the Appointment History
- Updating scheduled amounts
- Generating other appointment analysis reports

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

A. **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

B. **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. Delete appointments
     d. 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

C. **Using the Treatment Manager List**
 1. Explain the use and function of the Treatment Manager
 2. Set up the Treatment Manager View
     a. Select filter options
     b. Select columns to display
 3. Sort the list
 4. Understand the list
     a. Explain the information, symbols, and abbreviations displayed in the list
 5. Refresh the list
 6. Communicate with patients using the list
     a. Send an email message
     b. Print a Quick Label
     c. Print a Quick Letter
     d. Print batch mailing labels
 7. Switch to a different module from the list
 8. Copy the list to the Windows clipboard
 9. Hide a patient on the list

10. 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. Add an Office Journal entry
11. Switch to the Treatment Planner
12. View the Family Appointment list using the Other Appt(s) button or command
    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
13. Print the Treatment Manager List
14. Print the Unscheduled Treatment Plans report from the Office Manager

D. Setting up and using Perfect Day Scheduling
1. Explain the use of setting up automatic checks for time block appointments
2. Add, edit, and delete appointment types
3. Attach and detach an appointment type to a procedure code
4. Explain the purpose and function of setting up Provider Time Blocks
5. Add, edit, and delete Provider Time Blocks
    a. Enter a Time Block Name
    b. Select a Time Block color
    c. Set and change time block times
    d. Assign time blocks to an operatory
    e. Assign an appointment type to a time block
6. Enable and disable Perfect Day Scheduling
7. Schedule appointments using Perfect Day Scheduling
    a. Locate an appropriate appointment time in a time block
        i. Use the navigation buttons to manually locate an available time block
        ii. Use the Find New Appointment Time utility to locate an available time block
    b. Schedule an appointment in a time block
        i. Schedule an appointment with an appointment reason automatically attached to an appropriate type
        ii. Schedule an appointment with an appointment reason that is not automatically attached to an appropriate type
            – Select an appropriate appointment type
            – Explain the circumstances that would lead to an override prompt and list examples of when it would be appropriate to schedule an appointment type that does not match the time block

    c. Modify, clear, and reset time block hours on a specific day

        i. Drag and drop a time block edge to change hours

        ii. Drag and drop a time block to a different start and end time

        iii. Right-click to open the time block dialog box

           – Change a start or end time

           – Use the Clear for Today button

           – Use the Set to Default button

E. Setting scheduling benchmarks in the Practice Advisor

    1. Assign providers as Dentist/Hygienists

    2. Add, edit, and restore default scheduling benchmark ranges

    3. Set and restore default month spans

F. Generating the Schedule Management section of the Practice Advisor Report

    1. Explain the use and function of the Schedule Management section of the Practice Advisor Report

    2. Add, edit, and delete report options

    3. View and print the report

    4. Interpret the report data

G. Generating the Daily Huddle report

    1. Explain the use and function of the Daily Huddle report

    2. Add, edit, and delete report options

    3. Set up and restore Scheduled Patients defaults

    4. View and print the report

H. Working with provider gross production goals

    1. Add, edit, and delete provider gross production goals

I. Viewing production goals and production totals from the Appointment Book

    1. View daily and monthly scheduled production totals

    2. View Scheduled Production in the Appointment Book Calendar

        a. Activate and deactivate the Scheduled Production display

        b. Switch views to see scheduled production totals by provider

        c. Interpret and explain the scheduled production totals as contrasted with production totals on the Practice Advisor report or in the Practice Analysis report

J. Tracking scheduling practices using the Appointment History

    1. Explain the connection between passwords and the Staff ID listed in the Appointment History utility

    2. View the Appointment History for an individual appointment

        a. Interpret and explain the information displayed in the Appointment Information History dialog box

    3. Generate the Appointment History List

K. **Updating scheduled amounts**
1. Explain the function and scope of the Update Scheduled Amounts utility
2. Run the Update Scheduled Amounts utility

L. **Generating other appointment analysis reports**
1. Generate the Practice Assistant - Schedule Summary Report
2. Generate the Practice Assistant - Scheduled Production Analysis
3. Generate the Scheduled Treatment Plans report

Office Journal
Skill Summary (10% 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 assessment, 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