DENTRIX ENTERPRISE

DENTRIX ENTERPRISE 8.0.5

GETTING STARTED WITH THE CURRENT CLINICAL NOTES

HENRY SCHEIN®

Working with Clinical Notes

Keeping accurate and thorough documentation of each procedure performed in the dental office is an essential part of clinical dentistry. In Dentrix Enterprise, you can enter a clinical note to store information about a patient's exam and treatment that are not specific to a procedure.

Tip: You can access a patient's clinical notes from not only the Patient Chart but the Ledger and Family File.

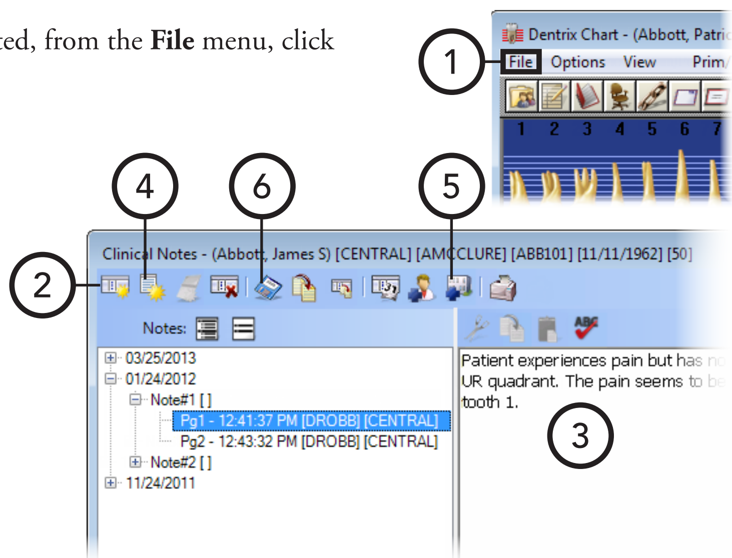
This section covers the following topics about clinical notes:

- Adding Clinical Notes
- Adding Clinical Notes Using Templates
- Signing Clinical Notes

Adding Clinical Notes

The clinical notes are arranged by date, note number, and then page. You can have as many notes as you want, with a maximum of 10 pages per note.

To add a clinical note



1. In the Patient Chart, with a patient selected, from the **File** menu, click **Clinical Notes**.

   The **Clinical Notes** window appears.
2. Click the **New Clinical Note** button.
3. Type a note you want to attach to this patient regarding an exam or treatment given.
4. To add a page to the clinical note, with this note still selected in the left pane, click the **New Clinical Note Page** button. In the **Change Date and Time** dialog box, leave the current system time entered, or type a different time; and then click **OK**.
5. To assign a different clinic than the currently selected clinic for the clinical note, click the **Change Clinic for Selected Note** button to open the **Select Clinic** dialog box and select the appropriate clinic.
6. Click the **Save Clinical Note** button.

   Tip: If you need to add additional information to the selected clinical note at a later date and time, click the **Insert Date/Time** button, and then begin typing the note; although, if the note is locked, you cannot change a clinical note, but you can add an addendum.

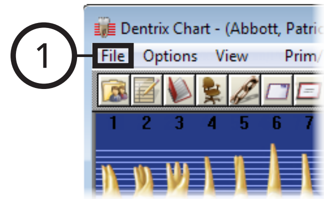
Adding Clinical Notes Using Templates

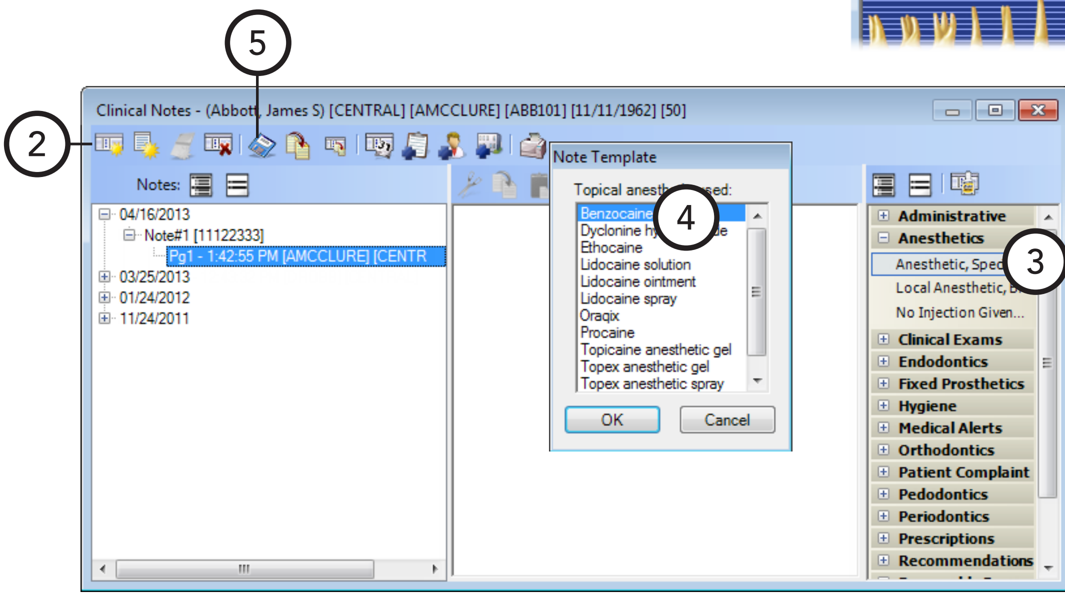
Using clinical note templates as a guide when collecting patient information, you can enter clinical notes for a patient in an orderly manner.

To add a clinical note using a template

1. In the Patient Chart, with a patient selected, from the **File** menu, click **Clinical Notes**.

   The **Clinical Notes** window appears.





2. Click the **New Clinical Note** button .
3. In the template pane (on the right), expand a category to view the list of available templates for that category by clicking the plus sign (+) next to the category name, and then double-click the template you want to use.

   Tip: If a clinical note page is not selected when you choose a template, a new clinical note will be added. So, to add a template to an existing note, make sure the appropriate page of that clinical note is selected.

4. Respond to the prompts associated with the template, if applicable. The template text and any responses you entered appear in the note field.
5. Click the **Save Clinical Note** button .

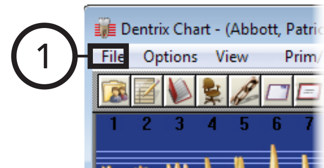
For more information about clinical note templates, see the "Creating clinical note templates," "Creating clinical note prompts," and "Setting up clinical note template categories" topics in the Dentrix Enterprise Help.

Signing Clinical Notes

A provider can digitally sign a clinical note to indicate his or her approval of the note. Signing a clinical locks it to prevent changes from being made to the text and to prevent the note from being deleted; however, a signed or locked note can be appended to.

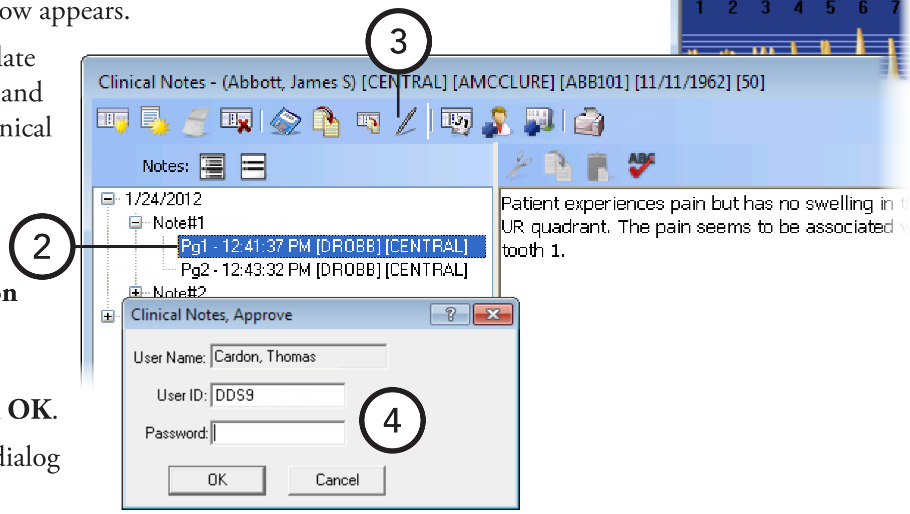
Tip: You can sign multiple clinical notes at one time from the Office Manager.

To sign a clinical note



1. In the Patient Chart, with a patient selected, from the **File** menu, click **Clinical Notes**.

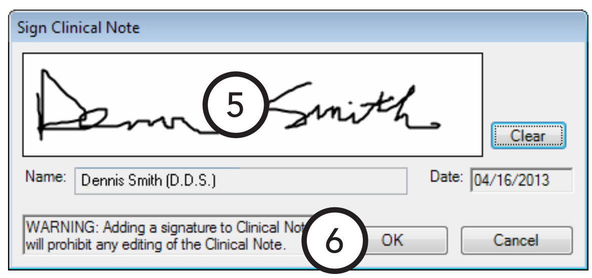
   The **Clinical Notes** window appears.



2. Expand the appropriate date category in the left pane, and then select the page of clinical note to want to sign.
3. Click the **Sign Clinical Note** button.

   The **Approval Verification** dialog box appears.
4. Type your **User ID** and **Password**, and then click **OK**.

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



5. In the signature box, sign your name using a mouse, light pen, finger on a touch screen, or stylus on a writing tablet.

   Tip: If you need to clear the signature to re-sign, click **Clear**, and then re-sign.
6. Click **OK**.

   When a signature has been added to the clinical note, a "Signed on [date]" stamp is added to the end of the clinical note.

Note: If you select a clinical note that has been signed, the **Sign Clinical Note** button changes to the **Signature** button. To view a signature for the selected clinical note, click the **Signature** button.

Creating Clinical Notes Automatically When Completing Procedures

Many tasks and transactions in a dental office are linked to an ADA Procedure Code. For instance, if you have a note attached to a procedure and a certain option is selected, a clinical note with the text of that procedure code's note will be created automatically when you complete the procedure.

To edit a procedure code's note

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.

2. Select a **Procedure Code Category**. All procedure codes associated with that category appear in the list box to the right.

3. Select a procedure code, and then click **Edit**.

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

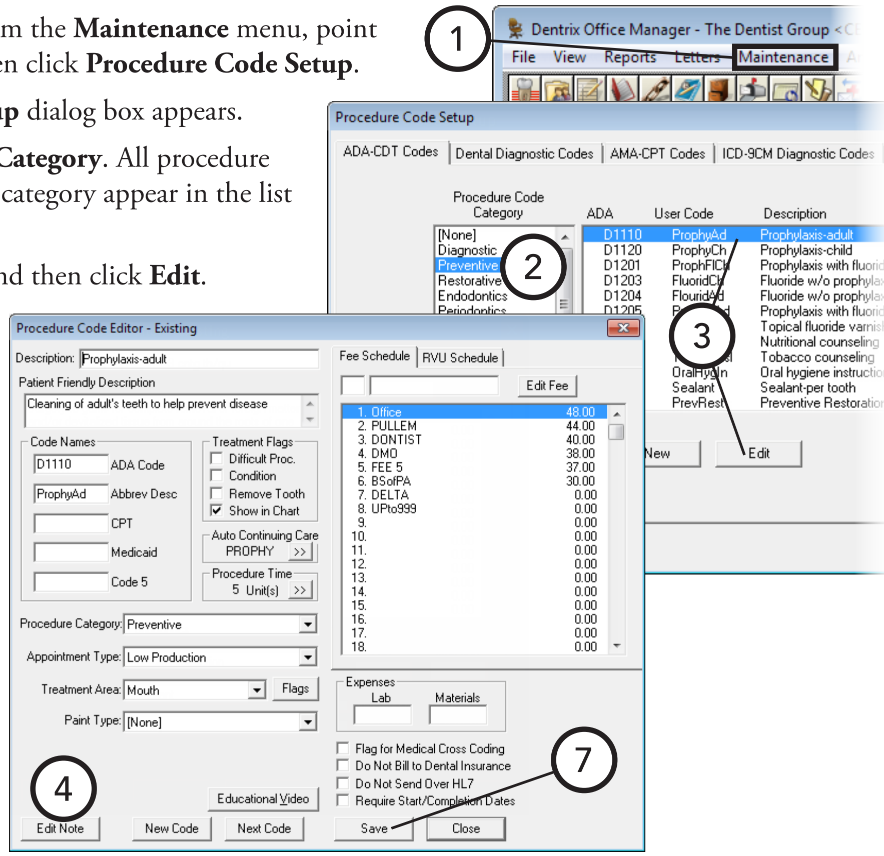
4. Click **Edit Note**.

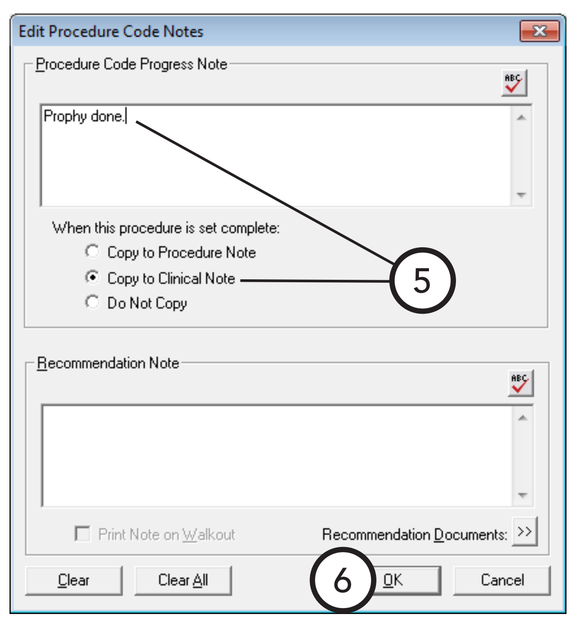
   The **Edit Procedure Code Notes** dialog box appears.

5. Type a **Procedure Code Progress Note**, and then select **Copy to Clinical Note**.

6. Click **OK**.

7. Click **Save**.





For a comprehensive explanation of all the options available for procedure codes, see the "Adding and editing ADA-CDT dental codes" topic in the Dentrix Enterprise Help.