

DENTRIX ENTERPRISE 8.0.5

GETTING STARTED WITH THE CURRENT CLINICAL NOTES

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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.
- 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.



- 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.

Dentrix Chart - (Abbott, Patr

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File Options View

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 ^[1].
- **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.

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Clinical Notes - (Abbott, James S) [CENTRAL] [AMCCLURE] [ABB101] [11/11/1962] [50]

CENTRAL 1

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IDBOBB1

Po2 - 12:43:32 PM [DB0BB1[CENTBAL]

Cancel

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

To sign a clinical note

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

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Notes: 🔚

Pg1

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i⊒-Note#1

. <u>
H−Note</u>#2 Clinical Notes, Approve

12:41

User Name: Cardon, Thomas

User ID: DDS9

ΟK

Password:

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.

Sign Clinical Note

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ABC

Patient experiences pain but has no swelling in

UR quadrant. The pain seems to be associated

Dentrix Chart - (Abbott, Patri

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Options View

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 description changes to the **Signature** button description.

💺 Dentrix Office Manager - The Dentist Group

File View Reports Letters Maintenance

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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.

Procedure Code Setup ADA-CDT Codes Dental Diagnostic Codes AMA-CPT Codes ICD-9CM Diagnostic Codes Procedure Code Category ADA User Code Description [None] Prophylaxis-acuit Prophylaxis-child Prophylaxis with fluorid Fluoride w/o prophylax ProphyCh ProphFIC FluoridCh Diagnostic D1120 2 D1201 D1203 D1204 Restorativ Fluoride w/o proph Endodontic Flourid4 Periodontic Prophylaxis with fluorid Topi years with hoor Topical fluoride varni Nutritional counseling Oral hygiene instructi Oral hygiene instructi Procedure Code Editor - Existing 3 Fee Schedule RVU Schedule Description: Prophylaxis-adul Patient Friendly Description Edit Fee Seala Sealant-per tooth Cleaning of adult's teeth to help prevent disease PrevBe Preventive Restoratio 2. PULLEM 3. DONTIST Code Names Treatment Flags 3. DUNII 4. DMO 5. FEE 5 6. BSofPA 7. DELTA Edit Difficult Proc. D1110 ADA Code Condition ProphyAd Abbrev Desc Remove Tooth 🔽 Show in Chart 8. UPto999 CPT Auto Continuing Care PROPHY >> 10. 11. 12. 13. 14. 15. 16. 17. 18. Medicaid Procedure Time 5 Unit(s) >> Code 5 Procedure Category: Preventive -Appointment Type: Low Production • Expenses Treatment Area: Mouth ▼ Flags Lab Materials Paint Type: [None] • Flag for Medical Cross Cording 7 Do Not Bill to Dental Insurance Do Not Send Over HL7 Educational ⊻ideo Require Start/Comp New Code Next Code Close

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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.

