



Coaching Report

DATE: Tuesday, March 22, 2022

LOCATION: Lake Spokane Dental

LEARNER: XXXXXXXX

Reason for training: Dentrix/SolutionReach Overview

TRAINER: XXXXXXXX

TRAINING: XXXXXXXX

Reviewed/Trained on the following:

1. HelpDesk Portal

- a. Service Request Types explained. Choose the most appropriate.
- b. Viewing Ticket Details. This will let you know what the status of a ticket is and any notes that have been added.
- c. Link available in the favorites bar and also through NEWsRoom >> IT Help – Phone #s are also listed there.

2. NEWsRoom/NEW Health Intranet

- a. Pointed out links to the following in the Knowledgebase:
 - i. Dentrix Workflows
 - ii. Education Videos
 1. Find the month

3. Dentrix Enterprise More Information Module

- a. Reviewed all the features and Tabs
 - i. Information and links to helpful modules.
 - ii. Tabs – Most Helpful for your role:
 1. Summary
 - a. Verify Demographic Information with pt – then you know if anything needs updated. Even Prov1 and Billing Type are included in the summary
 - b. Dental Ins – quick access and link
 - c. Next Appointments – Viewable and link to get directly to appointment OR to create a new appointment (+)
 - d. Continuing Care – Quick way to see them and if they have appointments already scheduled for them



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- e. Acct Balance/Outstanding Claims – Clearest way to view patient balance
- 2. Appointments
 - a. Use when patients call to schedule and/or confirm appointments. This will help you avoid unnecessary clicking and going through extra modules.
 - b. Great way to see if there is a broken appointment you could possibly use when rescheduling. Saves you time having to fill out all the appt details if it already created.
 - c. Gives you a good history of appointments... be sure to see the Status to know if the appointment really happened or not.
 - d. After viewing, it gives you a direct link to either creating a new appointment or getting to the appointment book.
- 3. Procedures
 - a. Quick way to see Treatment Plan and Completed treatment dates. (Click on the appropriate box) Recommended way for when you need to view last Recall/Prophy/etc.
 - b. Faster to view completed treatment than the ledger. Then if you need the ledger you can link on the link.
- 4. Treatment Plans
 - a. Treatment Planner Cases with procedures assigned, numbered, etc.
- 5. Billing
 - a. Shows you the billing statements sent to patient.
- 4. Dentrax Scheduling – Review Workflow
 - a. Always verify what the patient is asking to schedule for is also what the dentist recommended and if they are due (exams/cleaning/x-rays). Use More Info and Clinical Notes
 - b. If a broken appointment is available for the same procedure as they are requesting, use it for rescheduling. All the work is already done for you.
 - i. When you get the pop up to view the broken appt, select yes. If you decide to use it, then pinboard and find the date/time you can put it on the schedule.
 - ii. Update any appointment fields appropriately. Be sure to verify that Status, Schedule (Fixed or ASAP) and Type (SR blocked)
 - c. Find Appt Time
 - i. This can be set up to easily put in criteria and it will find you appointment times available



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5. ASAP list

- a. Use when looking for patients to fill appointments – especially for same day or next day appointments.
- b. Recommended trying adding availability in Description field so that it is viewable in the list and helps break down who might be options for what you are trying to fill.
 - i. Example Descs: Avail: M,T am or Avail: AM
- c. Are you putting dates and result in the note field when you call pt to offer appt?
- d. Think of ways to keep it current.
 - i. Are you removing them after calling multiple times?
 - ii. Are they possibly on the ASAP because of a rescheduled appt... do they really need it?

6. Athena Registration

- a. Recommend doing all updates in Full Registration
 - i. Answered questions on “Assigned Sex at Birth”. It is not required for dental, but it is an important field for Medical. It determines tests, etc. that need to be performed based on their anatomy. Pronoun is not required, but if given by the patient include it.
 - ii. Recommend watching “Athena Registration” Video for a deep dive into all the required fields.
- b. Insurances/Slides must be loaded through Quick View
- c. Lisa informed me that she has been able to keep up much better on entering paperwork now that the PCM is not required.
- d. HIPAA reminder – Be aware of who has access to the patient’s info and do not share with those not authorized.

7. Dentrix Note Workflow

Reviewed and discussed the following:

- a. Office Journal – Helpful for front office documenting non-mouth related discussions with patients.
 - i. Be sure to have the preview on
 - ii. Date range recommended 1/1/2010 – present then it will pick up on any notes since we started using Dentrix.
 - iii. Document the why patients cancel appointments. It already adds a note when appt is broken, but there is no way to view the patient note from the broken appt. It also shows the letters sent.

8. Treatment Planner/Financial Arrangements

- a. Treatment Planner module features:
 - i. Insurance (1,2,3,4)



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- ii. Cases – How to separate codes for financial arrangements
 - iii. Views – Best view for front office... Choosing the View Case Detail with Progress Notes
- b. Financials are attached to a case
- i. Click and drag the codes you are wanting to include in the FA to case. View the case details to see if the patient portion looks correct. If not, make sure that the correct insurance is entered. Are there multiple? Is one of them not calculating it correctly? Check insurances in Family File... does everything look correct? Check Procedure Code...is there something in the Primary and/or secondary insurance adjustment in the code details.
 - 1. If you need to force a code to display the correct amount: Double click on the code... either from the case or the Progress Notes code. In the “Override Ins. Estimate” box click on the box(es) you are going to add an override for. Then add the amount. Save and refresh the Treatment Planner. Does the Patient Portion show correctly now? If there is dual insurance, you may have to add for the secondary also. The option in the procedure code to “Do not bill to insurance” will force the total amount to reflect as the patient portion.

Operator: TEVANS Encounter #:

Date: 03/01/2022 Start Date: Completion Date:

Procedure: D2391 >> Resin composite-1s, posterior

Clinic: CENTRAL >> Override Ins. Estimate

Tooth: 1 Prim. Ins.

Surfaces: M >> Sec. Ins.

Amount: 176.00 Do Not Bill Dental Insurance

RVU: 2.50 Require Start/Completion Date Modifier:

Provider: TESTDOC >> Override Proc Flags

Instructor:

Procedure Status

Treatment Plan Approval Status

Approval Status: None

Completed

Existing-Current Prov

Existing-Other Prov

If you still have issues with it not calculating correctly then it is likely because there are multiple insurance plans attached and you may need to do more investigating on what is causing it to be incorrect. **Deductibles can sometimes mess with them as well.

I didn't review with you, but if you didn't know how to update deductibles:

They can be updated through the Family File >> Insurance



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If it isn't a quick adjustment to Treatment Plan then let the patient know that you will get it mailed to them as soon as you are able to get it arranged and printed.

- ii. To create a financial arrangement for FUTURE TX:
 1. While highlighted on the case you are wanting the FA for... click on Supporting Information.
 2. Delete the default not unless it is appropriate for what you need then find the appropriate Template. (You are authorized to do a financial arrangement for up to 3 monthly payments. *Anything beyond 3 monthly payments that needs to be approved by the Billing Manager*)
 3. Put in the arrangement details. Be specific. Each payment amount and when each payment is due.
 4. Add signature line and date
 5. Initial and date at the bottom of the note
 6. **Be sure to save note!**



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7. **If signing digitally**, you can choose to add your note to either the Informed Consent by choosing the “Financial Arrangement” consent and add your note to the “additional notes” area.
 8. Print Treatment Case – Choose the most appropriate option
 9. Have patient sign/date if they didn’t already sign digitally.
 - a. If they signed it digitally you can print to Dentrax Document Center first and then print a copy for the patient if they desire a copy.
 - b. If not signed digitally, scan into patient’s doc center and give back hard copy to patient.
- iii. To create a financial arrangement for TX COMPLETED TODAY:
1. From the ledger choose Print >> Walkout
 2. Type in your financial arrangement in the Message field.
 3. Be sure to add signature line
 4. Initial and date. FYI... you only have 4 lines of text that will display on the walkout so keep it condensed.
 5. If you want to preview before printing, then choose the option “Send to Batch” and it will then display in the Batch Processor on the Office Manager page. If not, choose print and it will automatically send to the printer.
 6. Have patient sign and date.
 7. Scan into patient’s document center.
 8. Give hard copy to patient.

*****The Walkout is also a great way to give the patient a list of their appointments scheduled and what they had done today.**

Sliding Discount

1. Adding to Athena – Quick View
 - a. NOTE: Adding family size and income for Sliding Discount does not update the Patient Registration family size and income. You will need to update it there also.
 - b. What if they already have one in there? Add a new one with the new dates. Expire the other one(s).
2. Update in Dentrax Family File Insurance



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3. Complete the application and scan into Dentrrix. Should it be in multiple patient's doc centers? If so, you can add them to all of their accounts through "Modify Document Attachments. Click on Patient and find the other family members and then click Close. Also remember to add it to their insurance.

ACTION ITEMS:

Watch the Athena Registration Video

COMMENTS:

Thank you, **XXXXXX**, for spending time to train with me. I was glad to hear that it has been helpful! Practice those things we went over until they become second nature. Two things to really focus on is using "More Info" as your navigator in Dentrrix. It can save you time and clicks. Second, really study the Athena Registration requirements in the video. There is a lot of helpful info in it.

I see your commitment and your determination and appreciate you! You are a valuable asset to Lake Spokane Dental Team and NEW Health! Keep Shining!

Trainer Signature:

Learner Signature: