



CADAT / CDAА Joint Annual Conference April 29 – 30, 2022



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Name of Course: *Clinical & Periodontal Charting Using Dentrix Software*

Course Content Outline / Educational Objectives:

This course will guide you thru setting up and using the defaults, procedure buttons and key strokes available in the Clinical Chart and Perio Chart to enable quick, accurate and detailed information.

Clinical chart navigation

- Dentrix Graphic Chart Views
- Procedure button setup
- Multi Code development
- Procedure Codes customization
- Progress Notes Views
- Model Views

Charting clinical information

- Entering treatment information
 - Selecting provider
 - Select tooth/quadrant
- Understanding Existing vs. Existing Other
- Select procedure
 - Using procedure buttons
 - Select from procedure code category
 - Auto state vs manual selection
- Adding procedure notes
 - Procedure note library
 - Developing custom procedure notes
 - Custom procedure notes
- Completing treatment planned procedures
 - Complete from chart
 - Complete from schedule



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Understanding clinical notes

- Creating new clinical note
- Develop prompt information
- Edit / copy existing clinical notes
- Viewing clinical notes for patient
- Signing a clinical note
- Changing provider/date
- Adding an addendum to a clinical note

Perio Charting

- Entering data with shortcuts
- Customizing entry paths
- Perio exam customization
- Copy to clinical notes

Speaker Bio

Betty Houston is a practice management consultant who has worked in the dental industry for more than 25 years applying her education in Accounting and Finance to enhance the profitability of Dental Practices. She is dedicated to implementing best practices, promoting education in management systems and creating consistent strategies for growth and stability. Betty is known for transforming struggling practices of all types into thriving profit centers, converting manual dental practices into computerized offices, and training staff in the implementation of efficient systems. Betty was a guest lecturer at the University of Southern California School of Dentistry for more than 20 years, and taught Practice Management there for 15 years. She has been a certified Dentrax and Easy Dental trainer for over 20 years and a workshop instructor for over 15 years.