DentiMax

Office Name:

Training Dates:

DentiMax Remote Training Outline: Complete Package

Session 1: Review / Scheduler / New Patient / Charting

Step 1: Basic Set-up Practice

- [ ] Set Up the Practice *(Including Emails for Reminders)*
- [ ] Set Up Users
- [ ] Set Up Security *(Covered w/ doctor alone to determine team account access levels)*
- [ ] Set Up Providers
- [ ] Set Up Resrouces
- [ ] Inter Office Messaging
- [ ] Customizing Software Home Page

Step 2: Gather Practice Info for Accounting Set-up

- [ ] Doctor's State License
- [ ] Doctor's Tax ID#
- [ ] Doctor's DEA #
- [ ] Doctor's NPI #
- [ ] Group NPI # *(If Applicable)*

Step 3: Accounting Set-Up

- [ ] Set Up Fee Schedules
- Enter Insurance Plan
- [ ] Set Up Default Coverage Tables
- [ ] Set Up Service Classes
- [ ] Set Up Service Codes
- [ ] Set Up Accounting Codes

Relevant Educational Video Links

Customizing the Home Screen

Creating a Code

Creating a New Medical Alert Code

Notes:

For training assistance, contact training@dentimax.com or (800) 704-8494 x. 242

Office Name:

Training Dates:

Session 2: Scheduler / New Patient

Step 1: Key Settings Review

- [ ] How to Utilize the Scheduler
- [ ] Add New Patient Appointment
- [ ] Insurance Entry/Plan Management
- Add Existing Patient Appointment
- [ ] Review / Change Status of Appointment
- [ ] Check-In / Check-Out
- [ ] Complete: Post Transactions and Payments

Relevant Educational Video Links

Creating Appointments

Clipboarding a Dental Appointment

Dental Office Scheduling

Entering Manual Recall Frequency

How to Set Head of Household

Insurance Webinar

Notes:

Session 3: Ledger / Claims

Step 1: Key Settings Review

- [ ] Posting to the Ledger
- [ ] Ledger Function
- [ ] Print Statement
- [ ] Claims and Pre-TX Claims
- [ ] Editing Treatment Plans
- [ ] NEA Attachments and Quick Eligibility

Relevant Educational Video Links

Post Procedures to Ledger from Chart Screen

How to Create a New Billing Number

View Options on Ledger

Basic Ledger Use

Detailed Ledger Webinar

Issuing a Patient Refund

Updating Fees on Treatment Plan

Notes:

Office Name: ______________________

Training Dates: ______________________

Session 4: Charting

Step 1: Key Settings Review

- [ ] Menu Options in Chart
- [ ] Customize Buttons in Chart
- [ ] Go Through View and Entry Mode
- [ ] Chart Tabs
- [ ] Perio Chart
- [ ] Acquiring Images
- [ ] X-Ray/Intral Oral Image Review
- [ ] Posting from Chart
- [ ] Clinical Note Templates
- [ ] Lab Case / Order

Relevant Educational Video Links

Creating Clincial Notes

Lab Case Tracking and Organization

Perio Exams

Clinical Charting Webinar, Pt. 1

Clinical Charting Webinar, Pt. 2

Notes:

Session 5: Additional Set-up

Step 1: Key Settings Review

- [ ] Set Up Multicodes
- [ ] Set Up Alert Codes
- [ ] Create Prescription Templates
- [ ] Modify Claim Pre-Edits
- [ ] Hide or Sow Communicator Button
- [ ] Time Clock

Relevant Educational Video Links

Creating and Using Multicodes

Creating RX Templates and Issuing Prescriptions

Notes:

Office Name: ___________________________

Training Dates: ___________________________

Session 6: Reports / Add-On Modules

Step 1: Key Settings Review

- [ ] Reports / Favorites: Recall / Referrals
- [ ] Text Messaging
- [ ] Web Kiosk
- [ ] DrFirst/E-RX (*can be added w/ Monthly fee)

Relevant Educational Video Links

- Finding reports in DentiMax
- Finding the Right Type of Report or Statement
- Managing Insurance Claim Reports
- DentiMax Document Center
- Document Center - Customizing Templates
- DentiMax Web Kiosk
- DentiMax Kiosk Click Through
- DentiMax Texting *
- DentiMax E-Rx *
- DentiMax Software Overview

Notes: