Office Name:

Training Dates:

DentiMax Remote Training Outline: Standard Package

Before Our First Session

Prior to our first training session please take some time to go through the practice set up as outlined below.

We will review these settings in our first session as some setup items need to be setup before we can begin training, but we will not spend a large amount of time on this to ensure we train on the key elements of the software to best prepare you and your staff for going "live."

DentiMax Set-Up: Practice Info

- [ ] Set Up the Practice
- [ ] Set Up Users
- [ ] Set Up Security
  (Covered with Doctor alone. Think about each team member & transactions they need to access based upon their job descriptions)
- [ ] Set Up Providers
- [ ] Set Up Resources

DentiMax Set-Up: Accounting

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

Related Educational Video Links

Customizing the Home Screen

Bookmarking Screens

Creating and Using Modules

Creating a Code

Creating Rx Templates & Issuing Prescriptions

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 1: Review / Scheduler / New Patient / Charting

Step 1: Key Settings Review

- [ ] Practice Info Settings Section
- [ ] Default Provider Set Up
- [ ] Provider's ID #'s

Step 2: Training Topics in this Session

- [ ] How ot Utilize the Scheduler
- [ ] Add New Patient Appointment
- [ ] Insurance Entry / Plan Management
- [ ] Check In / Check Out
- [ ] Menu Options in Chart
- [ ] Customize Buttons in Chart
- [ ] View and Entry Mode
- [ ] Chart Tabs
- [ ] Perio Charting
- [ ] X-Ray / Intra-Oral Camera Image Review
- [ ] Posting from the Chart
- [ ] Clinical Note Templates
- [ ] Lab Case / Order
- [ ] Creating Treatment Plans

Relevant Educational Video Links

Creating a New Appointment or Patient

Clipboarding a Dental Appointment

Dental Office Scheduling

Entering Manual Recall Frequency

How to Set Head of Household

Insurance Webinar

Lab Case Tracking and Organization

Creating Clinical Notes

Perio Exams

Clinical Charting Webinar, Pt. 1

Clinical Charting Webinar, Pt 2.

Notes:

DentiMax

Office Name: ____________________

Training Dates: ____________________

Session 2: Ledger Function

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:

Session 3: 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 Web Kiosk

DentiMax Texting *

DentiMax E-Rx *

DentiMax Software Overview

Notes: