

DentiMax Remote Training Outline: Starter 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:

Session 1: Review / Scheduler / New Patient / Ledger

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 to Utilize the Scheduler

Add New Patient Appointment

Insurance Entry / Plan Management

Check In / Check Out

Lab Case / Order

Creating Treatment Plans

Posting to the Ledger

Ledger Function

Print Statement

Claims and Pre-TX Claims

NEA Attachments / Quick Eligibility

Reports / Favorites : Recall / Referrals

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](#)

[How to Create a New Billing Number](#)

[View Options on Ledger](#)

[Basic Ledger Use](#)

[Detailed Ledger Webinar](#)

[Issuing a Patient Refund](#)

[Finding reports in DentiMax](#)

[Finding the Right Type of Report or Statement](#)

[Managing insurance claim reports](#)

[DentiMax Software Overview](#)

Notes: