Training Needs Questionnaire
Q & A Review

Why do we need to complete a Training Needs Questionnaire?
The reason we developed the Training Needs Questionnaire for our clients in need of additional training was two-fold:

1. Clients often do not know what they do not know. Because Dentrix Enterprise is so feature-rich and new features are added at least every year, often there are very useful features available……….but the client simply has not heard about the changes. We ask for the client to solicit input from all of their teams: clinical, business, billing, management, etc.
2. It is impossible for our training department to help plan and estimate our client's training needs without some idea of what they are currently using in their workflow, along with where they want to take their use of the software. And, more often than not, a client is jumping from an older version of DXE to the most current…………..so is making a huge jump in regard to advancements in the software.

What happens after we complete and submit the TNQ?

- The Enterprise Field Training Manager, Alice Kaplan, reviews the information and typically schedules a 15-30 minute conference call to ask specific questions, including preferred dates and times for training.
- After the call, the client will receive an email with the estimated number and type of training hours/sessions necessary to meet the training goals.
  - The email will also include information about:
    - Hourly training rate (training rate does not include trainer travel expenses for onsite training)
      - IHS training rate is currently $125.00 per hour
    - Terms for payment of hourly rate and any associated trainer travel costs
- Once accepted by the client, a Training Authorization form is sent to the client for completion.
- Upon receipt of the completed and signed TA, Alice – or one of our Account Managers – is then able to secure a trainer for the sessions.

Alice E. Kaplan|Enterprise Field Training Manager
Direct Line: 859.779.1289 | alice.kaplan@henryschein.com

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IHS Training Needs Questionnaire – DXE Version 7.0

This questionnaire has been created to help ensure that the training needs of our Dentrix Enterprise clients are being met, and includes all features of the software up through V 7.0.

Please look over each feature listed and indicate your interest in that topic for your upcoming training session. In order to carefully determine how much time is required to meet your training goals, it is imperative to anticipate and list the number of attendees to be trained on each topic.

Should you and your team need assistance or have questions about the features, please contact Alice Kaplan, Enterprise Field Training Manager, to setup a call. Alice's contact information: alice.kaplan@henryschein.com / direct line is 859-779-1289.

Thanks so much taking a few minutes to complete this Training Needs Questionnaire!

Topics	Checkmark to Include in Training	# of Trainees
General Concepts		
Computer & Windows Basics		
Desktop User's Guide		
HELP Menu in each Module		
Knowledgebase Tools (Article Search/Manuals/Webinars, etc.)		
IHS Enterprise Technical Support: 1-800-		
New! www.myvoice.dentrixenterprise.com		
Dentrix Practice Setup – Office Manager		
New Dental Director / Doctors must be added in RPMS before Dentrix Enterprise – Mapping Required – Contact IHS Enterprise Technical Support		
Hygiene Providers may be added directly to the database as they are auto mapped to the Dental Director		
Enter Clinic Information		
Edit Provider Information		
Enter Staff Information		
Edit Operatory Information		
Setup Practice Defaults		
Setup Default Insurance Claim Format		
Enter/Edit Procedure Fees, Descriptions, & Flags		
Enter/Edit IH Codes (Use authorized IH codes only)		
Setup (Customize) Multi-Codes		
Enter/Edit (Customize) Medical Alerts		
Enter/Edit (Customize) Payment Types		
Enter/Edit (Customize) Adjustment Types		
Enter/Edit (Customize) Billing Types		
Enter/Edit (Customize) Medications		
Enter/Edit (Customize) Allergies		
Enter/Edit (Customize) Prescriptions		
Setup Passwords		
Secure User Passwords		
Letter Merge		
4.0 Upgrade Inactivate Providers/Staff		

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Topics	Checkmark to Include in Training	# of Trainees
Dentrix Practice Setup – Office Manager (continued)		
5.0 Upgrade Additional Setting Options for Clinical Notes		
5.0 Upgrade Additional Setting Options for Treatment Planner		
5.0 Upgrade Spell Check Options		
5.0 Upgrade Setting up Patient Friendly Terms		
6.0 Upgrade HIPAA 5010 Compliance		
6.0 Upgrade UPIN Provider Field		
6.0 Upgrade Automatic Log Off		
6.0 Upgrade Granting Emergency Access to Patient Info		
6.0 Upgrade Passwords-Appointment Events: schedule new, edit, delete		
6.0 Upgrade Passwords-Appointment: setup operatory		
6.0 Upgrade Passwords-Family File: medical consultation		
6.0 Upgrade Passwords-Family File: merge patients		
6.0 Upgrade Passwords-Health Assessment: open, enter, edit, delete		
6.0 Upgrade Passwords-Emergency Access: Appointments Open, Chart Open, Family File Open, Image Open, Ledger Open, Medical Alerts View, Perio Chart Open, View All Patients		
6.5 Upgrade Medical Alerts/Medications/Allergies		
6.5 Upgrade Extra Patient Info on Title Bar		
6.5 Upgrade Appointment Duration Tracking		
6.5 Upgrade Passwords-New Security Rights		
6.5 Upgrade Setup “My Clinics”		
6.5 Upgrade ePrescribe Subscription Required		
6.5 Upgrade Outcomes Subscription Required		
7.0 Upgrade Clinic Setup: Clinical Note Settings		
7.0 Upgrade Definitions: New Definitions (Allergen Type, Allergen Reaction, Allergen Sensitivity, PQRI Registry), SNOMED, ICD9/ICD10		
7.0 Upgrade Passwords-TxPlanner Print Setup, Meaningful Use Calculation, Filtered Patient List, Reminders, Immunizations, Lab Tests, and Medical Encounters		
7.0 Upgrade Global Alerts		
7.0 Upgrade Copy Coverage Table		
7.0 Upgrade Copy Prescriptions to Clinical Notes		
7.0 Upgrade/MU Subscription Required MU User Setup		
7.0 Upgrade/ MU Subscription Required Filtered Patient List		
7.0 Upgrade/ MU Subscription Required Patient Reminder List		
7.0 Upgrade/ MU Subscription Required Meaningful Use Measure Calculation Report		
7.0 Upgrade Patient Portal Subscription Required		
7.0 Upgrade 835 EOB Electronic Import Subscription Required		

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Topics	Checkmark to Include in Training	# of Trainees
Family File		
Enter/Edit Default Provider (Prov 1)		
Patient Info Edits must be made in RPMS, not in Dentrix Enterprise! Patient Demographics are pushed only in one direction - from RPMS to Dentrix Enterprise		
Options for Select Patient (From any Dentrix Module)		
Set Continuing Care Types/Dates		
Enter/Edit Employer Information		
Patient Referral Source (Multiple allowed)		
Refer Patient to Another Doctor (Clinical Notes)		
Delete a Patient or Family		
Patient Note		
Referral Analysis		
Quick Letters		
Medical Consultation		
Enter/Edit Medical Alerts		
5.0 Upgrade Rate Code		
6.0 Upgrade Merging Duplicate Patient Records Into One Record		
6.0 Upgrade Additional Patient Statuses for Reporting		
6.0 Upgrade Longer Fields for Group and Subscriber ID #s		
6.0 Upgrade Medical Consultation Notes		
7.0 Upgrade Communication Preference		
7.0 Upgrade Health Exchange Module		
7.0 Upgrade/MU ***Subscription Required*** Immunizations		
Office Journal		
View Options		
How to Add Manual Entry		
Insurance Management		
Assigning Insurance To A Subscriber/Patient		
Adding New Employer/Carrier		
Enter/Edit Insurance Information & Coverage Tables		
Assigning Additional Insurance (up to 4 per patient)		
Process Primary/Secondary Claims		
Receive Insurance Payments		
Process Pre-Treatment Estimates		
Trojan Import		
Enter Deductibles/Benefits used		
Splitting Insurance Claim		
Joining/Purging Insurance Plans And Employers		
7.0 Upgrade Copy Coverage Table		

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Topics	Checkmark to Include in Training	# of Trainees
Chart		
Medical History Review		
Customize Categories & Procedures (Buttons)		
Charting Existing Conditions		
Chart Completed, & Recommended Procedures		
Chart Using Multi Codes		
Charting Conditions		
Changing Dentition		
Deleting/Editing Procedures		
Print The Tooth Chart/Setup Printer		
Auto State Button		
Procedure code Flag set up		
Enter Clinical Notes		
Perio Charting		
4.0 Upgrade Treatment Plan Approval Status		
4.0 Upgrade Option to insert Provider Name and Date at the beginning of Clinical Note (Set in Preferences)		
5.0 Upgrade New Default Patient's Chart Colors		
5.0 Upgrade New Patient Chart Look / Icons		
5.0 Upgrade New Short Cut Keys		
5.0 Upgrade DDX Integration Icon		
5.0 Upgrade Using Clinical Note Templates		
5.0 Upgrade Creating a Clinical Note Template		
5.0 Upgrade Using "Old" Clinical Note Templates		
6.0 Upgrade Patient Health Assessment		
6.0 Upgrade Printing Clinical Notes Icon		
6.5 Upgrade New Column Displays Tooth Surfaces		
6.5 Upgrade Medical History Review-Pain Scale Types		
7.0 Upgrade Alert Setup from Patient Window		
7.0 Upgrade New Medical Alert Window-Add Medical Alert/Severity/Notes		
7.0 Upgrade New Medical Alert Window-Add Allergy/Reaction/Sensitivity/Notes		
7.0 Upgrade New Medical Alert Window-Add Medication/Dosage/Sig		
7.0 Upgrade Inactivate Alert/Alert History		
7.0 Upgrade Prescriptions/ePrescribe Merge to Medications ***Subscription Required***		
7.0 Upgrade Smoking Status		
7.0 Upgrade Medical Encounters ***Subscription Required***		
7.0 Upgrade Lab Tests ***Subscription Required***		

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Topics	Checkmark to Include in Training	# of Trainees
Chart (continued)		
7.0 Upgrade Patient Education		
7.0 Upgrade Health Assessment Graph		
***5.0 Upgrade* Treatment Planner**		
5.0 Upgrade Creating a New Case		
5.0 Upgrade Setting Order to Visits		
5.0 Upgrade Alternate Cases		
5.0 Upgrade Update Treatment Plan Fees		
5.0 Upgrade Update Case Status		
5.0 Upgrade Case Status History		
5.0 Upgrade Treatment Plan Report Styles		
5.0 Upgrade Insurance Notes		
5.0 Upgrade More Information		
Ledger		
Enter Completed Procedures		
Enter Completed Multi Code Procedures		
Enter Treatment Plan Procedures		
Enter Payments (Guarantor/Patient)		
Line Item Accounting		
Apply Suspended Credit		
Enter Adjustments		
Select Billing Type		
Enter Completed Procedures		
Enter Payments (Guarantor/Patient)		
Line Item Accounting		
Apply Suspended Credit		
Enter Adjustments		
Select Billing Type		
Insurance Payments for Claims Sent Before Dentrix		
Process Walk Out Statements		
Fast Checkout		
Apply Finance Charges		
Edit a History Transaction (Validate/Invalidate)		
Process Payments Plans (Daily & Monthly)		
Search Payments Options		
6.0 Upgrade Procedures requiring Start/Completion Dates		
6.0 Upgrade Secondary Claim Information/Primary Claim Adjustments		
6.0 Upgrade Dental Diagnostic Codes / Attaching to Procedure		
6.5 Upgrade Batch Ins Payment New Features		
6.5 Upgrade New Column Displays Tooth Surfaces		

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Topics	Checkmark to Include in Training	# of Trainees
Appointment Book Set Up & Customization		
Practice Setup/Schedule		
Provider Setup/Schedule		
Flip Tab Setup		
View Setup (copy views)		
Setup Appointment Reasons		
Set Appointment Statuses		
Perfect Day Scheduling Setup (optional)		
Scheduling Appointments/New Patient Appointment		
Moving/Canceling/Rescheduling Appointment		
Finding Available Appointment		
Break an Appointment		
ASAP List/Open List		
Unscheduled List		
Wait/Will Call for Unscheduled Appointments		
Purge Old Appointments		
Print Route Slips		
History Button		
Appointment Check List		
Hiding Provider Columns in Set up		
4.0 Upgrade Appointment Provider=Chart Provider (Set in Practice Defaults)		
6.0 Upgrade Scheduling Events		
6.0 Upgrade Reschedule Events Using the Pinboard		
6.0 Upgrade Setting Up Individual Operatories		
6.5 Upgrade Appointment Duration Tracking		
Continuing Care		
Customize Practice Definitions (Continuing Care Status)		
Setup Continuing Care Type		
Attach Continuing Care To A Procedure Button		
Attach Continuing Care To Appointments		
Continuing Care List (optional)		
Continuing Care Cards (optional)		
Continuing Care in Appointment Book		
Document Center		
Setup Document Types		
How to Acquire Documents		
How to Attach document to multiple patients		
How to Print attached Documents		

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Document Center, continued		
6.0 Upgrade Understanding the New Document Center Window		
6.0 Upgrade Acquire Documents and Images		
6.0 Upgrade Modify Documents		
6.0 Upgrade Send to Document Center "Printer"		
6.0 Upgrade Unfiled Documents		
6.0 Upgrade Electronic Signatures for Documents		
6.5 Upgrade Document Type Templates		
Management Routines		
Print Using Batch Processor		
Display Reports		
Print Day Sheet/Deposit Slip		
Print Audit Reports		
Practice Management Reports		
Purge References (Employer, Insurance, Referral)		
Month End Update		
View Set up		
Printer Set up		
Unscheduled Treatment Plan Report		
6.0 Upgrade Submitting Claims with eTrans		
6.0 Upgrade Using Patient E-mail Address for Letter Merges		
6.0 Upgrade Using the Dentrix Add-in for Word 2007 and 2010		
DxOne Reporting		
Security Settings		
How To Setup/Filter Reports		
Daily Reports		
Financial Reports		
Practice Management Reports		
Encounter Reports		
Other Analysis Reports		
Schedule Reports		
Export Reports		
4.0 Upgrade Treatment Plan Approval Report		
5.0 Upgrade New Clinical Notes Report		
5.0 Upgrade New Dental Encounter Report		
5.0 Upgrade New RVU Daysheet Report		

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DxOne Reporting, continued		
6.0 Upgrade Initial Health History Report - % of patients w/Initial Health History who had a D0150		
6.0 Upgrade Oral Health Education Report - % of patients w/D1330/D1320 who had D0150/D0120		
6.0 Upgrade Periodontal Exam Report - % of patients w/D0180 who had D0150		
6.0 Upgrade Patient Information Accessed Report		
6.0 Upgrade Audit Trail – Includes overriding user ID & the security right that was overridden		
6.0 Upgrade Patient Health Report – Meaningful Use, Patient Health Assessment criteria, by Clinic		
6.5 Upgrade Appointment Duration Tracking		
6.5 Upgrade Payment Summary Report-Insurance Payment Reporting		
7.0 Upgrade Audit Trail Sort		
Miscellaneous		
4.0 Upgrade E-mail Address and Language added to Letters/Data Fields		

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Additional Notes and Specific Training Requests:

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PLEASE COMPLETE THE FOLLOWING PAGE (S) TO DESCRIBE YOUR TEAM MEMBERS AND THEIR ROLES!

IHS Site Name:
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Client Worksheet

Team Members Attending Training (Please Print)

Name	Job Description	Cross-Trained on Which Features of DXE?

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Team Members Attending Training (Please Print)

Name	Job Description	Cross-Trained on Which Features of DXE?