Adding a New Dental Provider (Dentist) to RPMS & DENTRIX ENTERPRISE V 7.0 for EDR

When the Dentrix Enterprise system (also known as EDR- Electronic Dental Record) is initially installed, all of the active **Dental providers (Dentists)** in RPMS are uploaded to Dentrix Enterprise. If, at a later date, additional Dental providers need to be added, then there is a specific process to accomplishing that action in order to ensure that the Dentrix Enterprise system will also be updated with the new Dental provider. Following the instructions below will ensure that the Dental provider is added successfully to RPMS *and* be available to Dentrix Enterprise. ***Under no circumstances*** should a Dental Provider ever be added directly to Dentrix Enterprise. If this occurs, PCC visits ***WILL NOT*** be created properly in RPMS. To add New Dental provider, the steps are as follows:

1. New Dental providers need to be added via the *AVA Add/Edit Provider* menu. This menu only allows you to add the Dental provider – it does not allow you to add an NPI for the provider. A required MFN-M02 message (Provider Update message) to Dentrix Enterprise ***will not be triggered*** without a NPI being present. If no MFN-M02 message is generated then the new Dental provider will not be added to Dentrix Enterprise. ***To ensure that the message is triggered***, proceed with Step 2 after adding the new provider. Below is a sample AVA ADD/EDIT PROVIDER menu:

   AVA Person/Provider Edit Menu

   IACT Inactivate/Reactivate Persons & Providers
   PERS Add/Edit New Persons
   PROV Add/Edit Providers **<<<– Choose this option**

   Enter NEW PERSON's name (Family, Given Middle Suffix): Dental, Provider

   Are you adding 'DENTAL, PROVIDER' as a new NEW PERSON (the 2669TH)? No// **YES**

   NOTE: Menus are set up differently on different systems and your menu may not look exactly like the menu above. In addition, you may or may not have this AVA menu available to you as it requires the AVAZPRV security key. If that is the case, then contact a member of your local IT staff for assistance.

2. Now that you have added the information for the new Dental provider you must add a valid NPI. To do so, back out of the *AVA Add/Edit Provider* menu by simply hitting the return (Enter) key and add the NPI for the new Dental provider via the *Add/Edit NPI values for Providers* option. The AVA menu for adding the NPI

   NPI Add/Edit NPI values for Providers [XUS NPI ENTER NPI FOR PROVIDER]

   "might" not be on the same menu as the one used to add the provider and their information. In fact, there is a possibility that it is not on any menu and must be added by your local IT staff. To complete the process for adding a new Dental provider, after you have added the NPI for that provider, proceed with Step 3.

NOTE: Although there is no security key for the AVA NPI menu, you may or may not have access to it, or it may not currently be available for everyone to use. If that is the case, then contact a member of your local IT staff for assistance.

3. This is the final ***REQUIRED*** step to ensure that the Dental Provider update message will be sent to Dentrix Enterprise. Go back into the *AVA Add/Edit Provider Menu* shown in step 1 and ***retype the TITLE*** of that Dental provider. Now, back out of the *AVA* menu, or simply press the return key until you are again at your main menu, and the new Dental provider message will be sent across to Dentrix.

    The reason for this step is because the way that the IHS AVA menus are written, the required message trigger for the provider update message ***will not be created*** until an edit/change in the provider's information is performed. This final step (Step 3) performs that edit and triggers the message.

Now that Step 3 is complete, this will complete the entire process of adding a new Dental provider to both RPMS and Dentrix Enterprise. Have someone on your Dental staff verify in the Dentrix Enterprise system that the provider is now available by taking the following steps:

1. Login to the CENTRAL clinic
2. In the Office Manager go to Maintenance| Practice Setup| Clinic Resource setup
3. Check for the new providers in the provider section in the middle. The provider ID number will be listed as the NPI number entered into RPMS
4. If the provider is not listed in CENTRAL clinic, contact Henry Schein Technical support at 800-372-4346; you will need to provide your customer name and customer number

Adding a New Dental Hygienist to EDR (Dentrix Enterprise) Version 7.0

Background

When EDR is initially installed, a setting that is present when the server is installed allows the trainer to set up hygienists as secondary providers. Once that is done, the trainer calls Dentrix Enterprise Technical Support (the EDR Helpdesk) and the support technician configures a global setting on the EDR database that disallows users to add/edit providers, including secondary providers. This prevents users from adding providers in EDR (providers should always be added in RPMS, not EDR).

To Add a Hygienist

To add a hygienist, you will need to contact Dentrix Enterprise Technical Support at 800-459-8067, select option 2, then option 3, or email ihs-support@henryschein.com . You will need your EDR customer name and customer number.

Once Dentrix Enterprise Technical Support has added a new hygienist, you will need to take the following steps to make the hygienist functional in EDR.

1. Password Setup
    - Office Manager / Maintenance / Practice Setup / Passwords
    - Select Setup Users for Passwords.
        - In the Password Administration –Setup User window
            - Select the team member,
            - Select the Clinic (this is a very important step!) The clinic defaults to Central. Only a few team members should have all rights to the Central Clinic.
            - *ALL Users will need to have these 4 rights to Central Clinic in addition to the clinics they will be working in:*
                - Appointment Lists, View All Clinics,
                - View all Operatories,
                - View All Patients,
                - View All Providers.
            - Expand the List and select the rights for this team member.
            - Save Changes.
                - Password rights can be copied from and to other users by using the "COPY RIGHTS" buttons on the upper right-hand corner.
                - If the team member will work in other Clinics their rights must be copied to each clinic they work in by using the Copy rights to other Clinics button on the right-hand corner.

BEFORE THE HYGIENIST CAN BE ADDED TO APPOINTMENT BOOK VIEWS, the hygienist must be added as a Provider in the Appointment Book with color and hours available for scheduling and then added to the Appointment Book View.

2. Adding Hygienist to the Appointment Book
    - Office Manager / Appointment Book
    - Click on the word Setup in the menu bar of the Appointment Book module
    - Click on Provider Setup
        - Click on Add Provider
            - Select hygienist as the Provider by using the search arrows after keying in hygienist's last name
            - Highlight hygienist's name and click on Add Provider to Selected List
            - Click OK
        - Click on the hygienist in the Provider list to select
            - Click on Setup and enter the hygienist's hours of availability for scheduling.
            - Click inside the black colored block and select a light color as the Provider Color
            - Click OK
            - Click Close to save all

3. Adding Hygienist to the Appointment Book View
    - Click on the word View in the menu bar of the Appointment Book module
    - Select the appropriate View to which you want to add the Hygienist and Click Edit
    - In far left middle of the window, under the tab Selected Providers, Click Modify List
    - Highlight the hygienist's name and click Add Provider to Selected List
    - Click OK to save added provider
    - Click OK to save all

4. COPY Appointment Book Views

(If the new user is a provider they will also need to be added to the Clinic and the Clinic View(s) first.) The new/edited view will *need to be copied to ALL users.*

- Open Appointment Book.
- Select View.
- Select Copy View.
- Select the Clinic and the User.
- Select the view(s) and move to the Selected Box.
- Select Copy To Other Users at the bottom of the Window.
- From the Copy Appointment views from users, select the user(s) you want to copy the views to move to the Selected Users box.
- Check Auto Over write to over write existing user views
- Select Copy to complete
- Wait until you get the message that the views have been copied.
- Select Close until you are back to the Appointment Book

5. DXOne Reports *(ONLY for users that will be running reports)*
   - In DXOne Reporting, from the menu bar, select security.
     - The Reports Security dialog box appears.
   - Under user list, select the user for whom you are assigning security rights.
   - Select the Report for which you want to set security for.
   - Set up the following options:
     - Rights,
     - Clinics,
     - Provider staff.
   - Select Save- these rights can be copied to other reports by selecting “Copy Users Security>>”.
     - Select the reports to copy rights.
     - Click the “Copy Rights to Reports Below” button *above the reports window*.