

PracticeWorks Training Topics

Thank you for your interest in additional training. Use the form below to define the training topics and determine the approximate time your training will require.

Check each item that you would like to include in your training and make notes to help us customize the training for you. Include notes such as your goals; current use; and whether the training is for new team members, new roles, or cross training.

After you complete the form, email it to SalesCoordinators.US@csdental.com. A rep will get back to you within two business days with details and a quote. **Note:** The minimum amount of training that can be purchased is one hour.

If you have any questions before you send the form, please call 800.944.6365.

Name: _____ **Practice Name:** _____

Email Address: _____ **Phone Number:** _____

Please contact me about additional training.

Note: All times are approximate, and some topics might overlap.

Accounts Receivable Management (1 hour)

- A/R Report
- Overdue Accounts Contact Expert
- Letters for Overdue Accounts
- Tracking

Notes for Accounts Receivable Management:

Analysis Experts (Two 3-hour sessions)

- Understanding Analysis Experts
- Creating an Analysis Expert
- Practice Script Formulas

Notes for Analysis Experts:

Appointment Book Set Up (30 minutes)

- Block Booking for Hours/Vacations
- Block Booking for Production

Notes for Appointment Book Set Up:



Appointments (1 hour)

- Basic Appointment Scheduling
- Appointment Expert
- Sooner if Possible

Notes for Appointments:

Automation (3 hours)

- Understanding Automation
- Automating Letters
- Automating Messages
- Actions Button Automation

Notes for Automation:

Charting (Three 3-hour sessions)

- Basic Charting
- Soft Tissue – Perio Charting
- Clinical Notes and Forms
- Treatment Plans

Notes for Charting:

Clipboards (30 minutes)

- Understanding Clipboards
- Patient Relationships (LW, RP, IP)

Notes for Clipboards:

Contact Experts (1 hour)

- Pending Page
- Appointment Confirm/Review
- Recall
- Delinquent Accounts
- Outstanding Insurance
- Unscheduled Treatment Plans
- Lab Tracking
- Follow-Up Calls

Notes for Contact Experts:

Documents (30 minutes)

- Adding Letters
- Editing Letters
- Printing Letters

Notes for Documents:

Electronic Services (30 minutes)

- Electronic Insurance Claims
- Electronic Statements
- Easy Pay

Notes for Electronic Services:

Employee Set Up (30 minutes)

- Adding Employees
- Editing Employees
- Removing Employees

Notes for Employee Set Up:

**Insurance (1 hour—Indemnity Plans;
2 hours—Indemnity Plans and Managed Care)**

- Submitting/Resubmitting
- Insurance Estimating
- Changing Insurance Information
- Blue Book Updating
- Insurance Messages

Notes for Insurance:

Integrated Prescription Writer (30 minutes)

- Adding Prescription Drug Templates
- Printing and Calling In Prescriptions
- Viewing Patients' Prescription History
- Adding Pharmacies
- Printing Prescription Reports

Note: Available in PracticeWorks, version 7.

Notes for Integrated Prescription Writer:

Integration (1 hour)

- With Digital Camera
- With Digital Radiograph
- With Intraoral Camera
- With Other

Notes for Integration:

Multi-Doctor Cross Settlement (1 hour)

- Understanding Cross Settlement
- Cause and Effects of Adjustments
- Deposit Slip Numbers Do Not Match

Notes for Multi-Doctor Cross Settlement:

New Employee—General Review (Two 3-hour sessions)

- Appointment Overview
- Checking In and Out
- Adding New Patients
- Insurance Overview
- Daily Routine Overview

Notes for New Employee—General Review:

Office Expert (15 minutes)

- Customizing Preferences
- Utilizing Office Expert

Notes for Office Expert:

Ortho Contracts (2 hours)

- Understanding Ortho Contracts
- Creating an Ortho Contract

Notes for Ortho Contracts:

Practice Central (30 minutes)

- Setting Practice Central Preferences
- Setting Practice Central Security
- Utilizing the Practice Central Window

Note: Available in PracticeWorks, version 7.

Notes for Practice Central:

PracticeWorks Configuration (30 minutes)

- Treatment Classes
- Documents
- Appointment Colors
- General Configuration

Notes for PracticeWorks Configuration:

PracticeWorks Email (30 minutes)

- Confirmation Emails
- Recall Emails
- Individual Emails
- Newsletters by Email

Notes for PracticeWorks Email:

Recall Management (30 minutes)

- Recall Contact Expert
- Recall Cards and Letters
- Maintaining Full Recall Schedule

Notes for Recall Management:

Referral Tracking (30 minutes)

- Adding Professional Referral Sources
- Tracking Professional and Patient Referrals
- Printing Referral Reports

Note: Available in PracticeWorks, version 7.

Notes for Referral Tracking:

Reports (30 minutes)

- Daily
- Monthly
- Periodic (Quarterly/Yearly)

Notes for Reports:

Security (30 minutes)

- Access Levels
- List of Security Events
- Understanding the Audit Log

Notes for Security:

Statements (30 minutes)

- Troubleshooting
- Review Statement Options
- Statement Messages

Notes for Statements:

Time Clock (30 minutes)

- Clocking In and Out
- Printing Time Cards
- Editing Time Card Information
- Adding Illness and Vacation Time
- Setting Office-Wide Paid Holidays

Note: Available in PracticeWorks, version 7.

Notes for Time Clock:

Treatment Plans (30 minutes)

- Entering
- Scheduling From
- Tracking
- Predeterminations

Notes for Treatment Plans:

User-Defined Contact Experts (Two 3-hour sessions)

- Understanding User-Defined Experts
- Practice Script Formulas
- Utilizing User-Defined Experts

Notes for User-Defined Contact Experts:

Voice Activation (1 hour)

- Soft Tissue Voice Charting

Notes for Voice Activation:

What's New in PracticeWorks (3 hours)

- 5.0 Upgrade Information
- 6.0 Upgrade Information
- 7.0 Upgrade Information

Notes for What's New:

Yellow Sticky Notes (15 minutes)

- Various Locations
- Various Uses

Notes for Yellow Sticky Notes:
