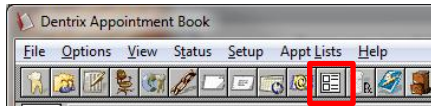# UPDATING QUESTIONNAIRES IN DENTRIX

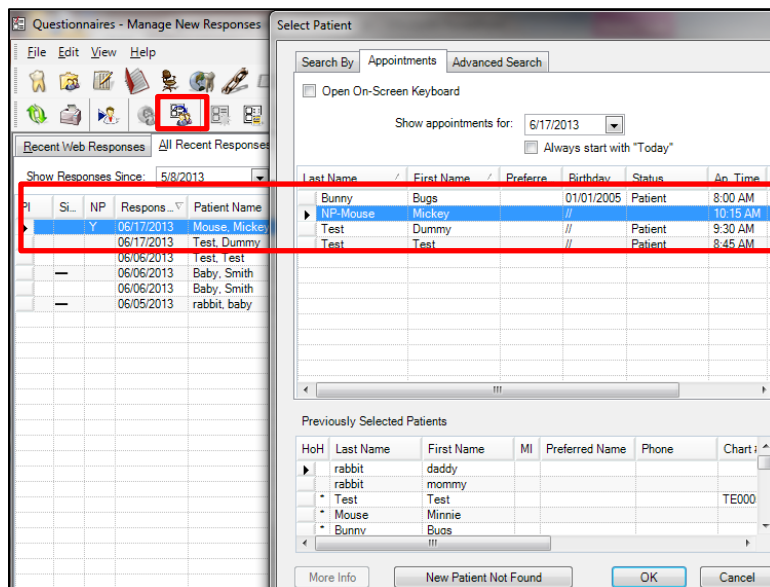From any module open **Questionnaire Module.**

If the module opens up with a patients name and not manage new responses as shown below just click on the M**anage New Responses** icon.


To get the information from the questionnaire into the Family File, highlight the questionnaire to be updated then click on **Edit** then **Update Patient Information** or use the **Update Patient Information** icon from the menu bar.
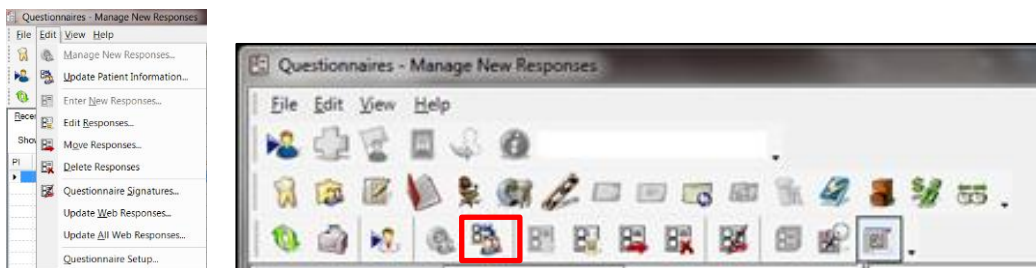

If updating a form for a **New Patient,** make sure to select the correct new patient. NOTE: If the patients name on the forms does not exactly match the name on the appointment it will not go directly to the correct name.

Choose the correct option. NOTE: This **replaces** going into the Family File and selecting File | New Patient with appointment

NOTE: If you choose select family you will get the Dentrix database pop-up

You will now see this screen:

Click on the Update Family File button and follow the prompts.

In the PI-Spouse Responsible Party section, if there is a person in this area that is other than the patioent, select add new family member to patient's family.

NOTE: The HOH can be changed from family file in needed.

When selecting this option it does make that patient an active patient, so let office know the will want to go into family file and make this patient a non-patient.

If you have selected **Use Note to Update Patient Information**, you will be given 5 choices to pick where you want that note to show up.
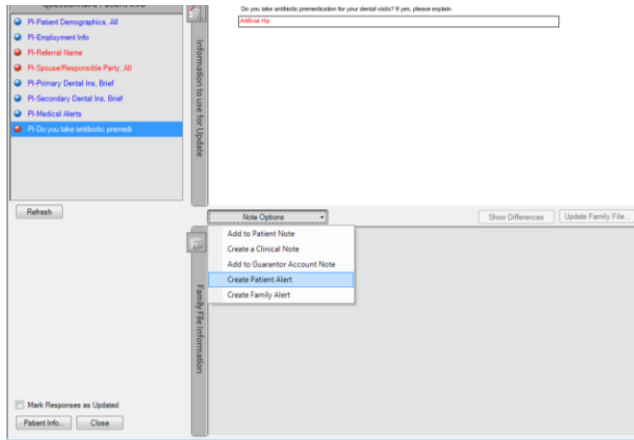
For example if you select create patient alert the patient alert screen will appear.
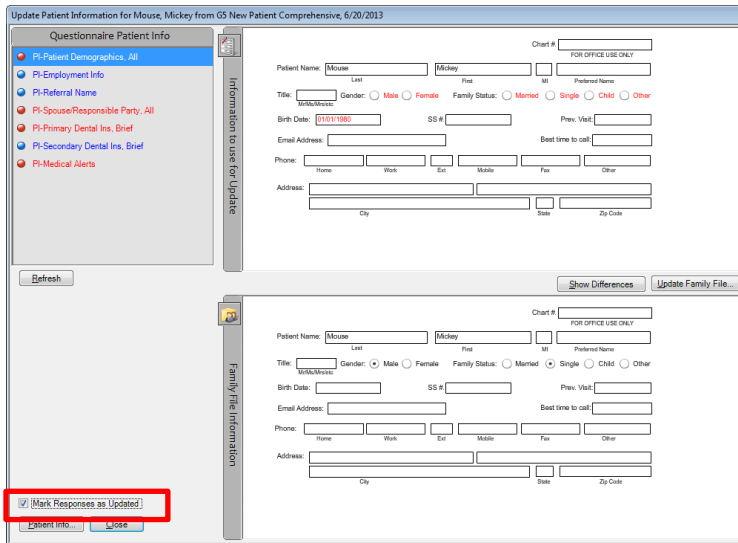
If any button on the left stays red the **Mark Responses as Updated** checkbox will not automatically fill in. Manually check to create the blue checkmark (shown below in the first column PI). That will alert the rest of the staff that this form has been updated.

Capturing Signatures:

You can use a mouse, electronic signature pad, or tablet pc within the questionnaire module.

At the moment you cannot sign anywhere other than in the questionnaire module, which means patients cannot sign on the internet or iPad. You can use confirmation checkboxes within form and have patients check off on certain items like consents and HIPAA.

After signature is captured you will see an icon in the signature column, and you can go to the last page of the questionnaire to see the signatures as well.
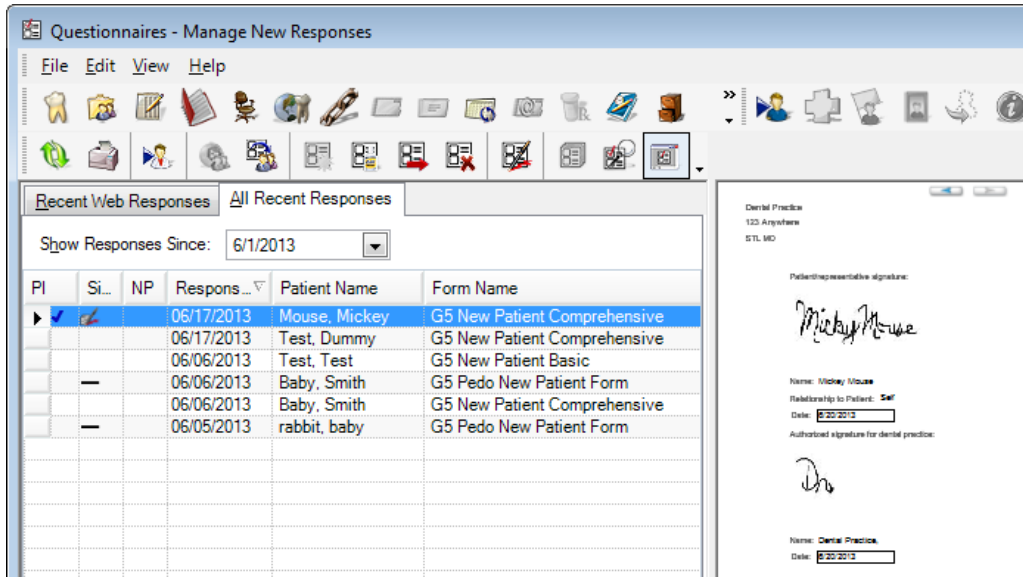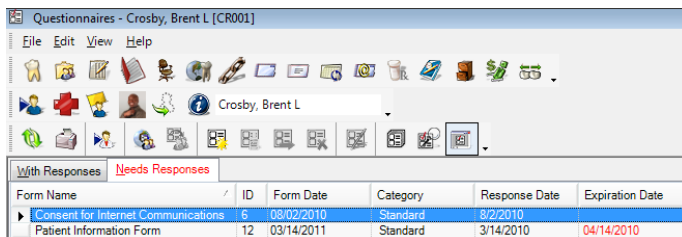

If the office needs to print form with signature select:
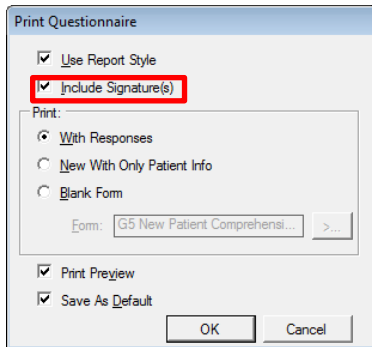
When a form has expired, the **Needs Responses** tab is displayed in red.

The form that has expired will have the expiration date display in red.

By right clicking you can select which columns you would like to display. By dragging you can reorder and resize the column headings