

## Back Office Tip Sheet on using Questionnaires from Patient Chart

Now that the office is using Questionnaires with the Web Manager and Kiosk the office staff will be able to see those forms right from the patient chart.

Open the Patient Chart and click on the Questionnaire icon



PI	Signed	Prov	Form Name	ID	Form Date	Category
			Patient Information Form	1	01/28/2008	Standard
			Medical & Dental History	3	01/28/2008	Standard
			Consent for Internet Communications	6	01/28/2008	Standard
			Truth-in-Lending Statement	4	01/28/2008	Standard

**Dentrix Dental Practice**  
727 E Utah Valley Drive, # 500  
American Fork UT 84003  
(801)763-9300

**Patient Information**

Please take a moment to enter or update your information to help us ensure the quality of your care is excellent.

Chart #: CR001  
FOR OFFICE USE ONLY

Patient Name: Crosby, Brent L BC  
Last First MI Preferred Name

Title: Mr. Gender: Male Female Family Status: Married Single Child Other  
Mr/Ms/Ms/Ms

Birth Date: 5/17/1967 Prev. Visit: 12/10/2007 Email Address: 1BranCro@dentrix.com

Phone: 707-5969 707-6800 707-1212  
Home Work Ext Mobile Best time to call: evenings

Address: 850 N 150 E  
Westside NV 44444  
City State Zip Code

Preferred appointment times:  
 Mon  Tue  Wed  Thur  Fri  Sat  
 Morning  Afternoon  Evening  Any time

When a patient has filled out a form you will see a small red checkmark on the icon itself. Once the Questionnaire module opens you will see two tabs

- With Responses – forms that have already been completed
- Needs Responses – forms that have not been completed

Once the form has been completed you have the option of either entering new responses which will allow you to choose the form you want to create new responses by allowing you to go through the form again to update it while the patient is in the chair or you can select edit responses. This will allow you to change any of the responses that have already been completed. \*If the form has already been signed, you will not be able to edit any of the responses. You will only be able to enter new responses.



By having your forms on “View Questionnaire” you can click on the form you want and see it right away to the right. This way you don’t have to click back and forth from one screen to another. This will also allow you to scroll through the form and see it in its entirety.

The screenshot shows a web application interface. On the left, there is a table with columns: PI, Signed, Prov, Form Name, ID, Form Date, and Category. The table is under the 'Needs Responses' tab. The first row is selected, showing 'Patient Information Form' with ID 7 and Form Date 06/30/2014. Other rows include 'Patient Information Form' (ID 1, 01/28/2008), 'Medical & Dental History' (ID 3, 01/28/2008), 'Consent for Internet Communications' (ID 6, 01/28/2008), and 'Truth-in-Lending Statement' (ID 4, 01/28/2008).

On the right, the 'Patient Information' form is displayed. It includes a header for 'Dentrix Dental Practice' with address '727 E Utah Valley Drive, # 500 American Fork UT 84003' and phone '(801)763-9300'. The form contains various input fields for patient details:

- Chart #: CRO01 (FOR OFFICE USE ONLY)
- Patient Name: Crosby (Last), Brent (First), L (MI), Preferred Name
- Title: Mr. (selected), Gender: Male (selected), Family Status: Married (selected), Single, Child, Other
- Birth Date: 5/17/1967, SS #: 000-00-0005, Prev. Visit: 7/15/2014
- Email Address: terra.westerhol2@henryschein.com, Best time to call:
- Phone: (801)797-5969 (Home), (801)797-6600 (Work), (402)570-4208 (Mobile), (801)797-6669 (Fax), (801)797-5900 (Other)
- Address: 650 N 150 E (City), P.O. Box 110 (State: NV, Zip Code: 11111)

At the bottom of the form, it asks 'Whom may we thank for referring you to our practice?'.