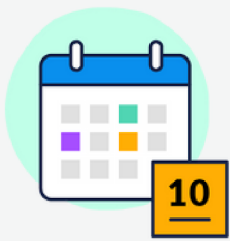# Receptionist Learning Checklist

Check your Dentally knowledge today!


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The Calendar

Learning Goal 1: Calendar Basics
Receptionist fundamentals begin with the Calendar. This Learning Goal will confirm that you can open and find your way around the Dentally Calendar.

- ☐ I know how to navigate through the calendar

- ☐ I know how to search for available appointments

- ☐ I know how to use the clipboard

- ☐ I know how to change the calendar view
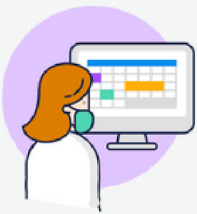
Appointments

Learning Goal 2: Create and Update Appointments
The patient journey begins with the appointment. This learning goal will confirm that you understand how to create and update appointments.

- ☐ I know how to view a patient's appointment history

- ☐ I know how to book an appointment from the calendar

- ☐ I know how to book a treatment appointment

- ☐ I know how to extend appointments from the calendar

- ☐ I know how to reschedule and cancel an appointment

- ☐ I know how to book family appointments

- ☐ I know how to DNA an appointment

- ☐ I know how to send a manual appointment reminder

- ☐ I know how to prevent appointment booking

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Patient Details

Learning Goal 3: Patient Details
This learning goal will ensure you have the knowledge needed to keep track of your active and lapsed patients in Dentally.

- [ ] I know how to search for a patient
- [ ] I know how to create a new patient
- [ ] I know how to update a patients details
- [ ] I know how to check a patients recall
- [ ] I know how to archive a patient
- [ ] I know how to create a family group
- [ ] I know how to add an NHS exemption and how to remove an NHS exemption
- [ ] I know how to check is a patient is due to fill in a medical history

Patient Arrival

Learning Goal 4: Process a Patient on Arrival
This learning goal will cover what you need to do when a patient arrives for their appointment.

- [ ] I understand the function of all the patient detail fields in the patient record
- [ ] I know how to confirm that the medical history has been completed and how to add a medical alert
- [ ] I know how to send the medical history form to the patient via SMS or email
- [ ] I know how to upload patient correspondence
- [ ] I know how to create a note, including a pop up note
- [ ] I know how to update the appointment status to waiting

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Patient Departure

Learning Goal 5: Understand Patient Departure Tasks
This learning goal will ensure you know what needs to be done when a patient
returns to the front desk after their appointment.

- ☐ I know how to book the next appointment from the appointments tab

- ☐ I know how to view and edit the invoice, including how to add sundry items to
the invoice

- ☐ I know how to process health fund claims

- ☐ I know how to take payments

- ☐ I know how to apply discounts and understand the importance of applying a
discount when prompted

- ☐ I know how to print or email the invoice to a patient

Patient Correspondance

Learning Goal 6: Understanding patient correspondence
This learning goal will ensure you know how to contact a patient through
different means of communication in Dentally and stay on top of admin...

- ☐ I know how to send an email to a patient

- ☐ I know how to send an SMS to a patient

- ☐ I know how to send a letter to a patient

- ☐ I know how to scan and upload a patient document to a patients record

- ☐ I know how to record a phone call against a patient's record.

- ☐ I know how to send a patient portal link to a patient

- ☐ I know how to change a patients preferred contact method

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Patient Accounts

Learning Goal 7: Understanding patient accounts
This learning goal will make sure you have the knowledge to take payments and understand how patient accounts work.

- ☐ I know how to view a patient balance

- ☐ I know how to take a payment

- ☐ I know how to record a deposit

- ☐ I know how to create a sundry sale

- ☐ I know how to explain and unexplain a payment against an invoice

- ☐ I know how to view an invoice

- ☐ I know how to print & email an invoice to a patient

- ☐ I know how to create a statement of account for a patient

- ☐ I know how to access and check the takings report

Dentally Admin

Learning Goal 8: Understand other areas of Dentally
This learning goal will give you the opportunity to learn about other areas of the Dentally software that you will be using in daily practice life.

- ☐ I know how to create a task against a patient record

- ☐ I know how to create a task for myself or another member of my team

- ☐ I know how to create a pinned note

- ☐ I know how to bulk cancel appointments for a single or multiple days

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