How to create clinical note templates in Dentrix

Clinical note templates save time when you enter notes and keep your documentation consistent and complete. This guide shows you how to create clinical note templates in Dentrix, add built-in and custom prompts, use the finished template in a patient chart, and trim prompts to fit your workflow. The example builds a periodontics template named "SRP."

Prerequisites

- Access to a patient's chart in Dentrix.
- The correct patient record open before you begin.

Choose a template method

Dentrix gives you two ways to set up a clinical note template:

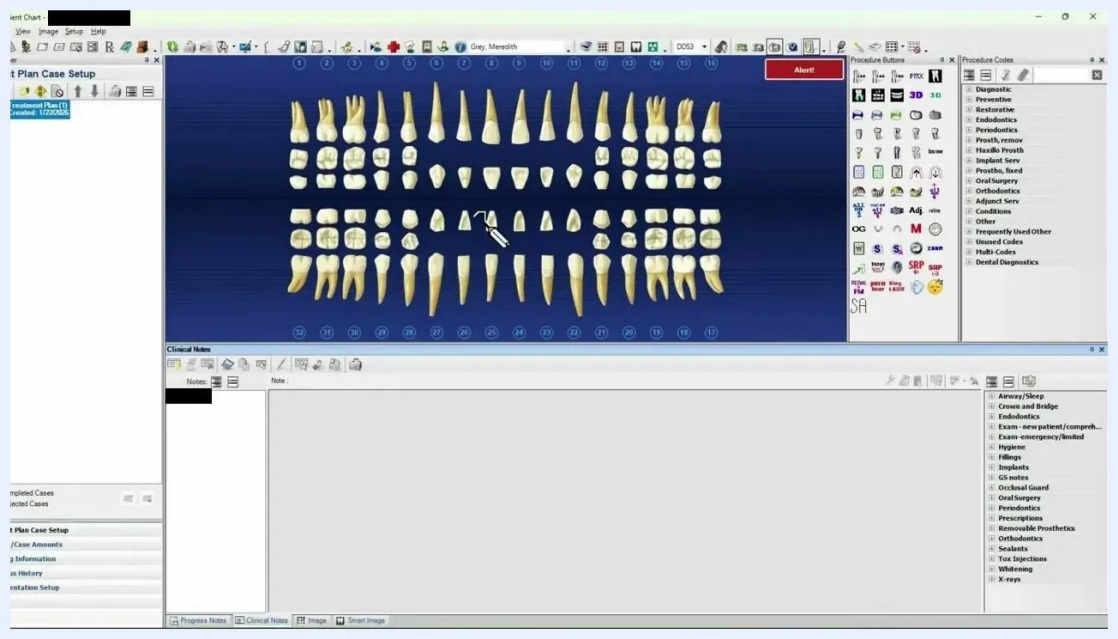
- Use prompts that ask you questions and automatically fill in the clinical note based on your answers.
- Use a pre-filled clinical note template that you can edit as needed.

The example below combines both methods.

Set up a new template

Step 1: Open the Clinical Notes tab

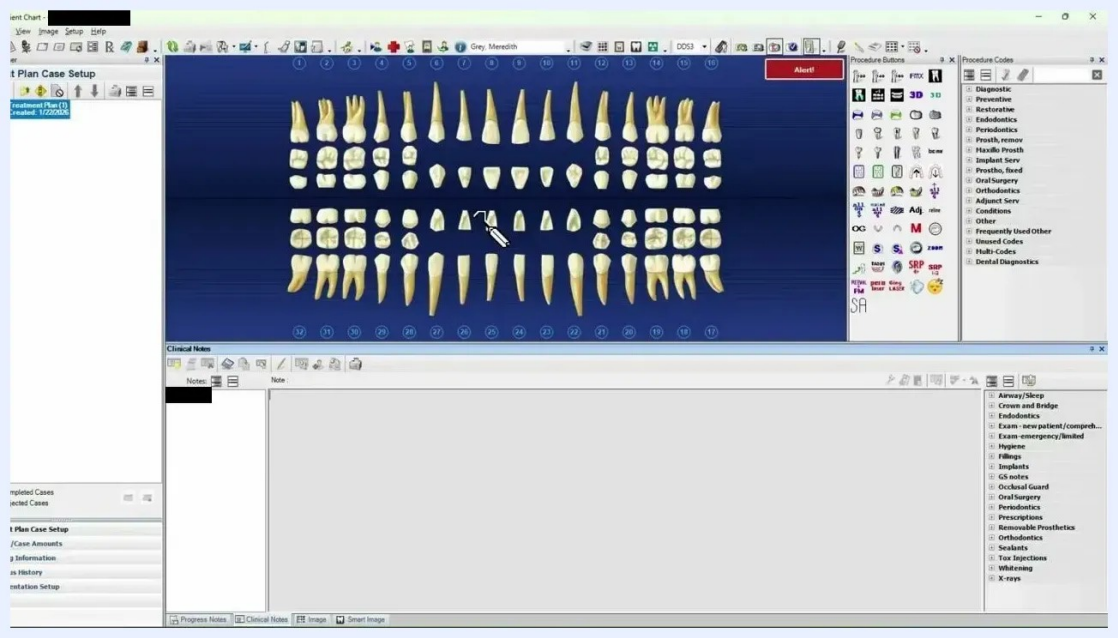
Open the patient's chart. Look at the tabs at the bottom panel of the chart window: **Progress Notes**, **Clinical Notes**, **Image**, and **Smart Image**. Click **Clinical Notes** to see all clinical notes for the patient.



Patient chart with the dental diagram, procedure codes, and clinical notes section visible

Step 2: Open Template Setup

Find and click the **Template Setup** button, an icon near the clinical notes section. The window that opens lists your template categories.



Clinical notes section with the Template Setup button highlighted and categories visible

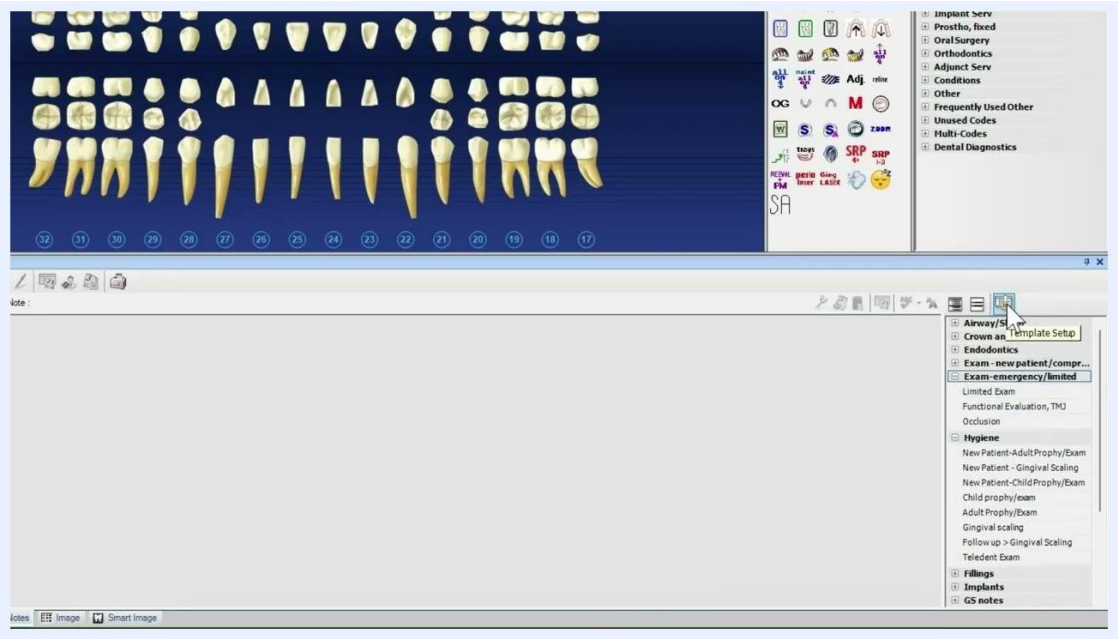
Step 3: Select a category

In the **New Clinical Note Template** window, select a category for your template. The available categories are:

- Airway/Sleep
- Crown and Bridge
- Endodontics
- Exam (new patient/comprehensive)
- Fillings
- GS notes
- Hygiene
- Implants
- Occlusal Guard
- Oral Surgery
- Orthodontics
- Periodontics
- Prescriptions
- Removable Prosthetics

- Sealants
- Tox Injections
- Whitening
- X-rays

For this example, select **Periodontics**.



New Clinical Note Template window with the category list expanded and Periodontics selected

Step 4: Name the template

Enter a name in the **Template Name** field. For this example, type SRP.

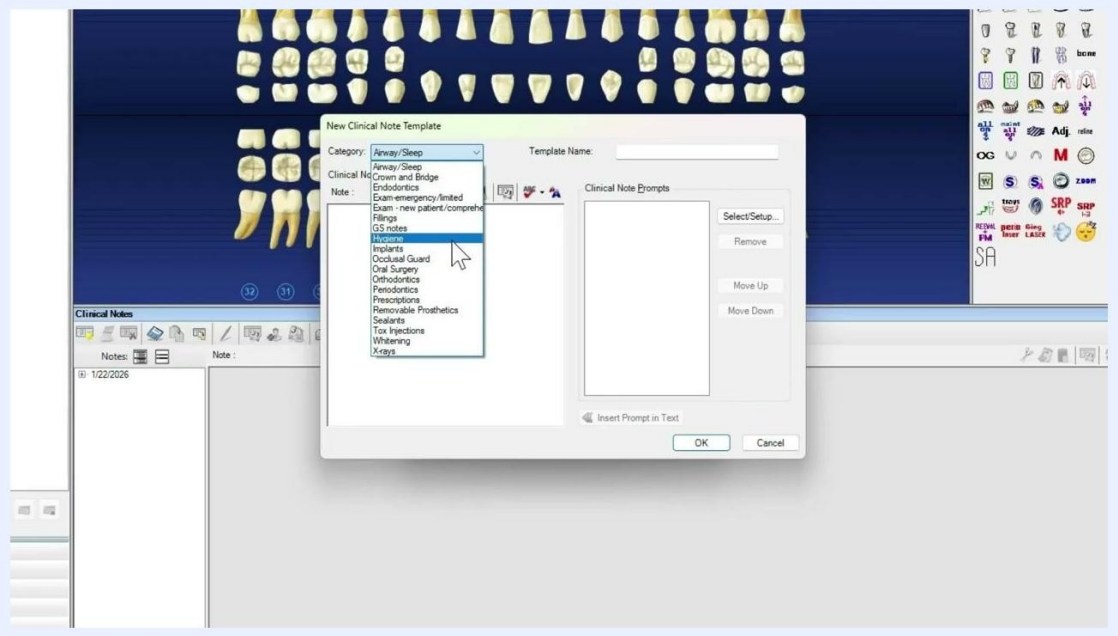
Step 5: Start editing the note text

The window has two working areas:

- The left side lets you type the clinical note text directly.
- The right side, **Clinical Note Prompts**, is where you add prompts that guide users through filling out the note.

Confirm that the category is **Periodontics** and the template name is **SRP**. In the **Clinical Note Text** area, type the opening text:

```
Patient presents for SRP in
```



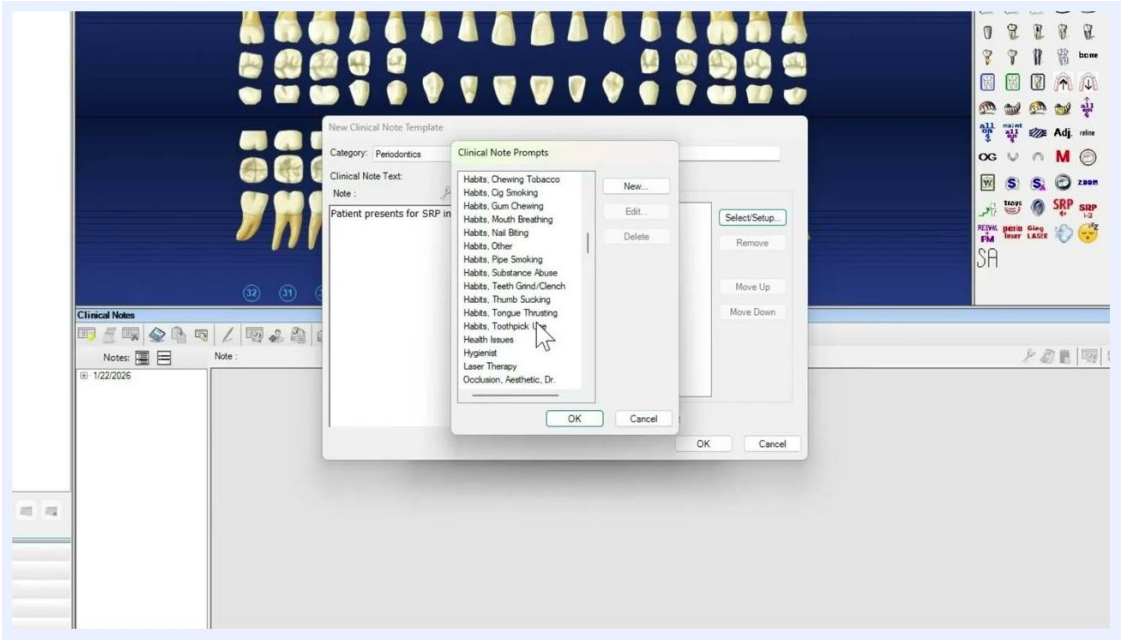
New Clinical Note Template window with Periodontics and SRP entered, ready for text or prompts

Add prompts and pre-filled text

Step 6: Add a built-in quadrant prompt

1. In the **Clinical Note Prompts** panel on the right, click **Select/Setup** to open the list of available prompts.
2. Scroll to the built-in quadrant prompt, such as **Quadrant-Select Multiple**.

3. Select the prompt and click **OK** to add it to your template's prompt list.

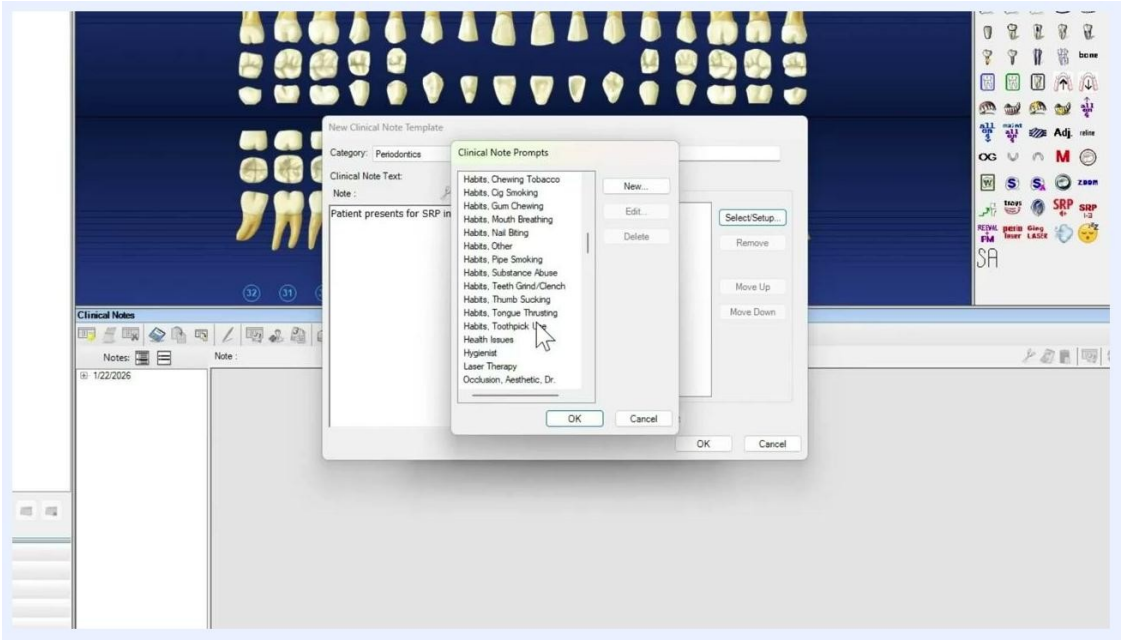


Built-in prompts list open with the cursor selecting a prompt

Step 7: Insert the quadrant prompt into the note text

1. Click in the note text where you want the prompt to appear, after "SRP in."
2. Highlight the prompt in the **Clinical Note Prompts** list.
3. Click **Insert Prompt in Text**.
4. Confirm that the prompt code, such as ~Quadrant-Select Multiple~, appears in the note text.

When you use the template, Dentrix asks you to select quadrants and inserts your answer automatically.



Prompt inserted into the note text with the Insert Prompt in Text button highlighted

Step 8: Add more pre-filled text

Continue typing in the note text area. For example:

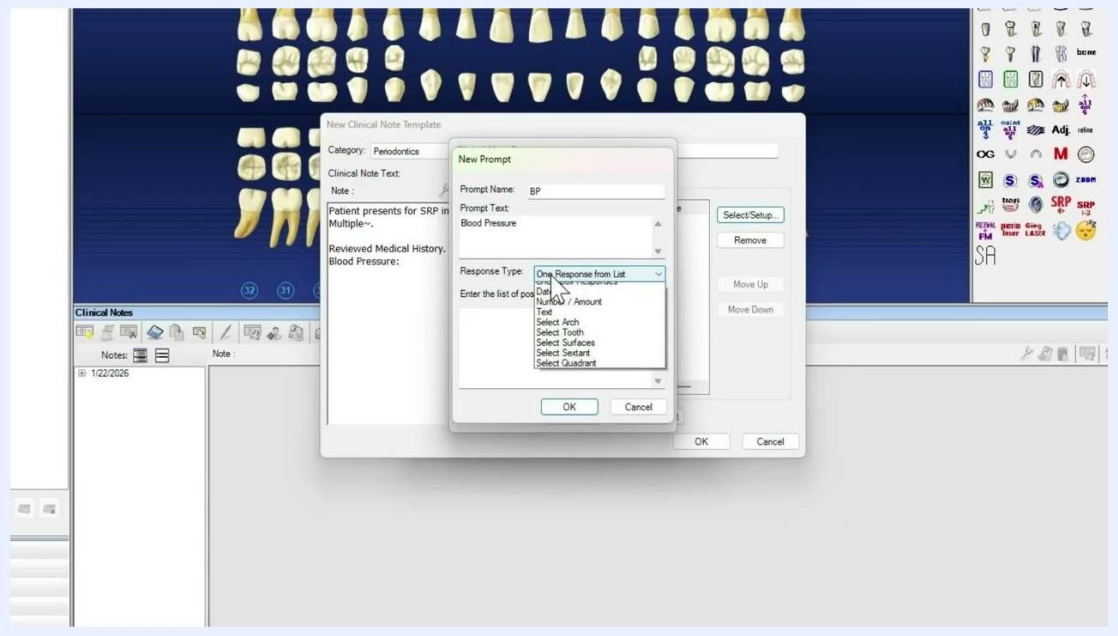
```
Reviewed Medical History.
Blood Pressure:
```

Step 9: Create a custom blood pressure prompt

When no built-in prompt fits, you can create your own.

1. In the **Clinical Note Prompts** panel, click **Select/Setup**.
2. Click **New...** to open the **New Prompt** window.
3. For the prompt name, enter BP.
4. For the prompt text, enter Blood Pressure.
5. Choose a **Response Type**. Select **Number / Amount** if you want users to enter a numeric value, or **Text** if you want them to type the blood pressure as free text.

6. Click **OK** to save the prompt.

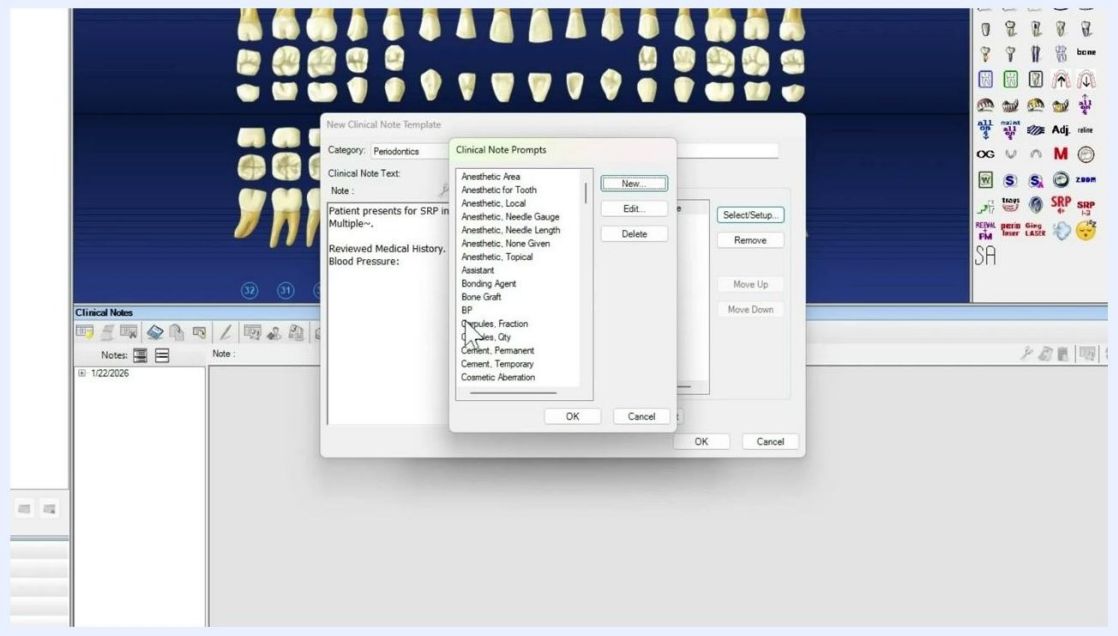


New Prompt window with BP as the name, Blood Pressure as the text, and response type options visible

Step 10: Insert the custom prompt into the note text

1. Confirm that the **BP** prompt appears in your **Clinical Note Prompts** list.
2. Click in the note text after "Blood Pressure:".
3. Highlight the **BP** prompt and click **Insert Prompt in Text**.

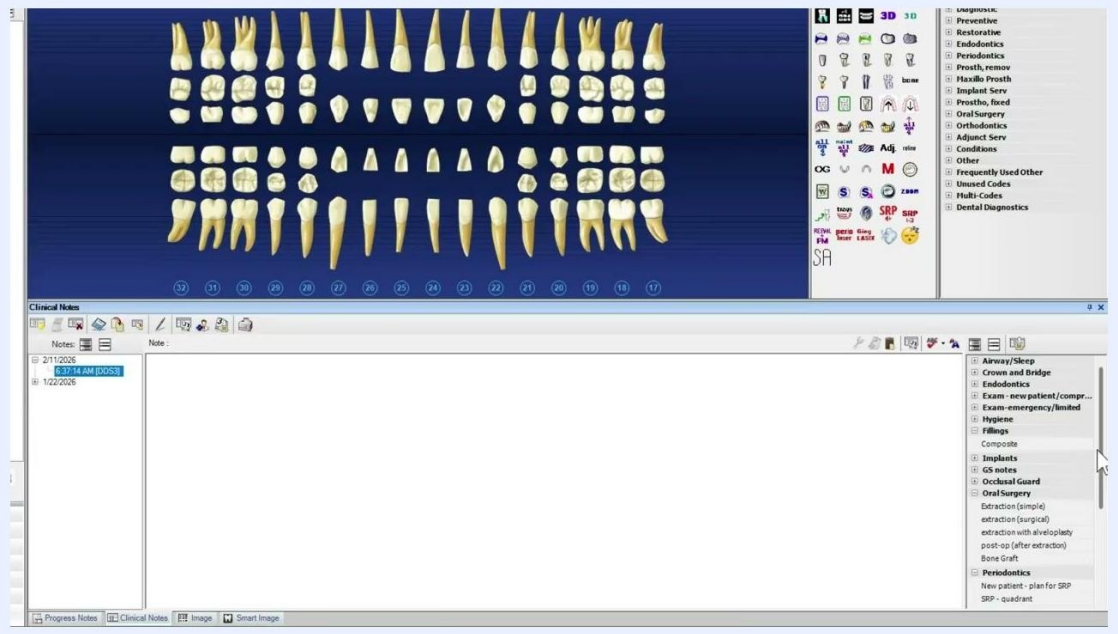
4. Confirm that the prompt code for BP appears in the note text.



Clinical Note Prompts list with the custom BP prompt visible and ready for insertion

Step 11: Save the template

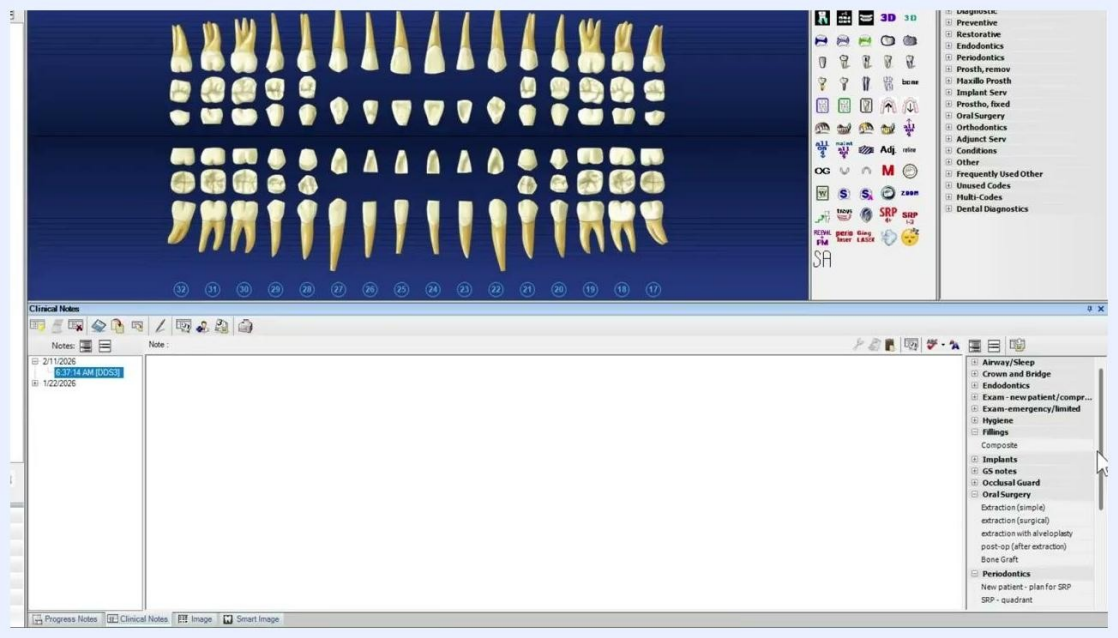
Click **OK** in the **Clinical Note Prompts** window to save your changes and close the prompt setup.



Clinical Note Prompts window with the BP prompt selected and the cursor on OK, template text visible

Step 12: Close Template Setup

In the main **Template Setup** window, click **Close**. Your new template, "SRP," now appears under the **Periodontics** category in the template list.



Template Setup window showing the SRP template under Periodontics with other templates visible

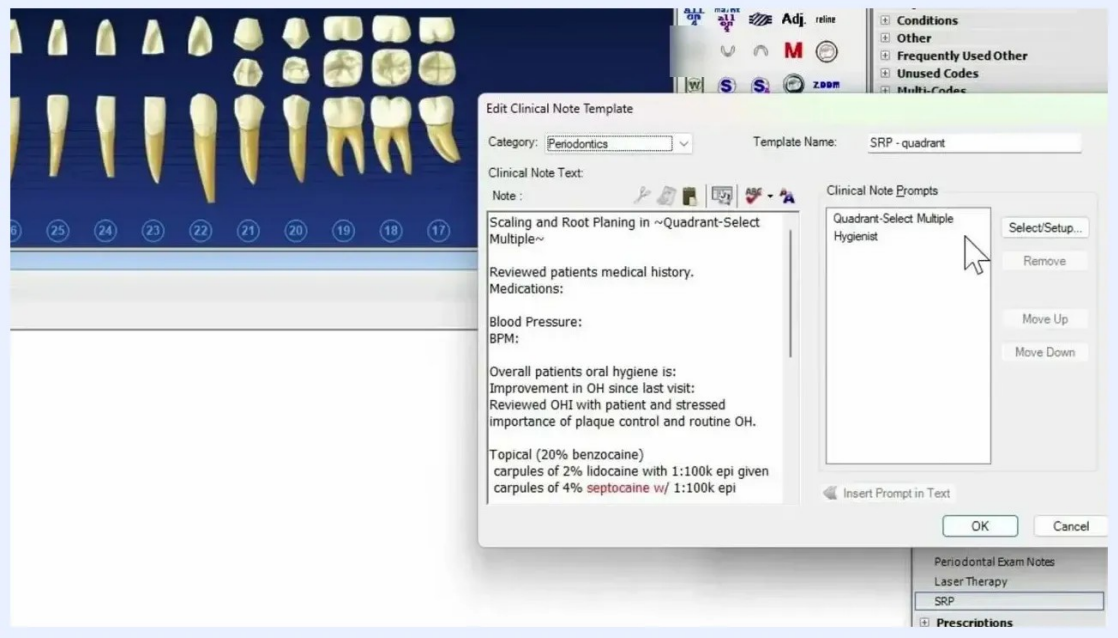
Use the new clinical note template

Step 13: Review the available templates

In the main clinical notes area, templates are organized by categories such as Extractions, Periodontics, Prescriptions, and Removable Prosthetics. Example templates under Periodontics include:

- New patient - plan for SRP
- SRP - quadrant
- 4 Week Re-Evaluation/PerioMain
- Perio Maintenance w/ Exam
- Perio Maint - no exam
- Periodontal Exam Notes
- Laser Therapy
- SRP

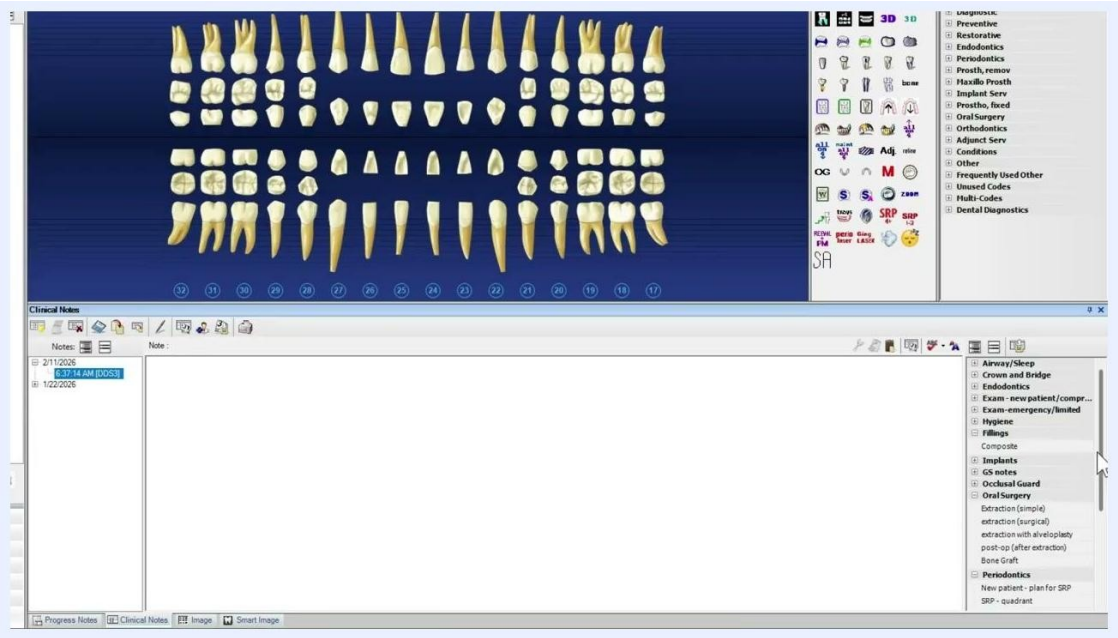
Hover over any template to see a tooltip with its full name.



Clinical notes area showing a categorized template list, with the cursor hovering over a template and SRP - quadrant selected

Step 14: Start a note from the template

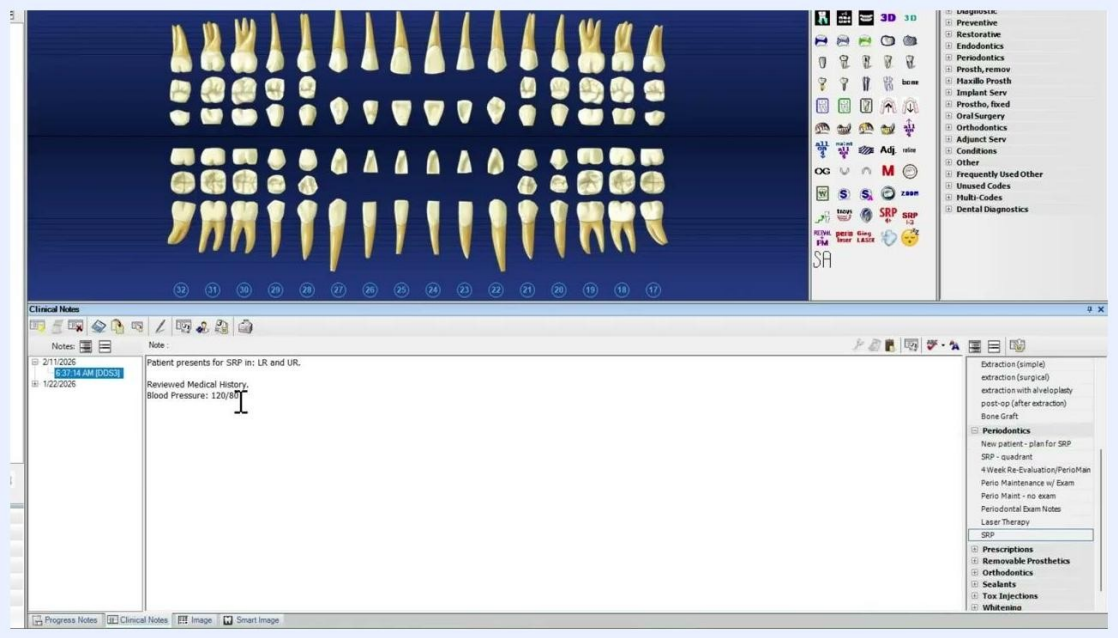
Locate the **SRP** template under the **Periodontics** category. Double-click it to begin a new note.



Clinical notes screen with Periodontics > SRP selected, ready to create a new note

Step 15: Respond to the prompts

Dentrix asks you for the required information. A **Quadrant-Select Multiple** dialog appears first. Select the appropriate quadrants, such as Upper Right and Lower Right, and click **OK**.



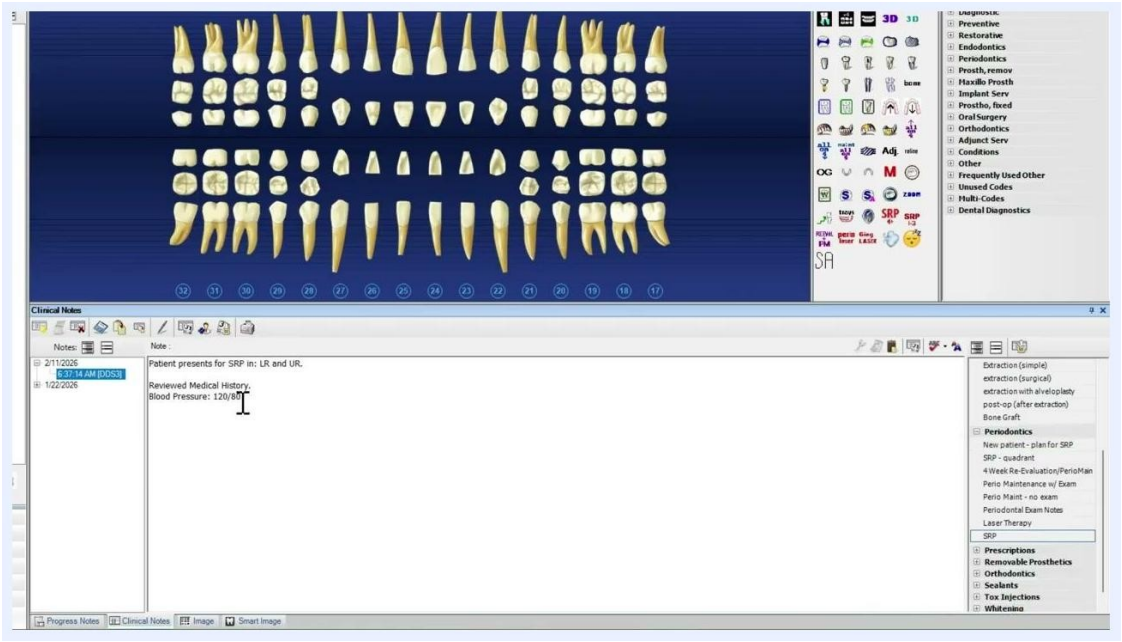
Quadrant-Select Multiple dialog showing Upper Right, Upper Left, Lower Right, and Lower Left options

Keep this limitation in mind: you cannot exit a prompt dialog until you enter all required information. If you need to leave the prompt, for example to view an x-ray, you must cancel the note entry and start over.

Step 16: Enter the blood pressure and review the note

When prompted for blood pressure, type the value, such as 120/80, and confirm. Dentrix inserts your responses into the note text. The completed note shows the pre-filled text and your answers:

```
Patient presents for SRP in: LR and UR.
Reviewed Medical History.
Blood Pressure: 120/80
```



Clinical note area showing the completed note with quadrant and blood pressure responses filled in

Adjust prompts for workflow efficiency

Too many prompts can interrupt documentation. You can keep only the prompts that matter and leave the rest as free text.

Step 17: Review an existing template's structure

Open the **Edit Clinical Note Template** window. In this example, the **Category** is **Periodontics** and the **Template Name** is "SRP - quadrant." The **Clinical Note Text** area mixes prompts and standard text:

```
Scaling and Root Planing in ~Quadrant-Select Multiple~
Reviewed patients medical history.
Medications:
Blood Pressure:
BPM:
Overall patients oral hygiene is:
Improvement in OH since last visit:
Reviewed OHI with patient and stressed importance of plaque control
and routine OH.
Topical (20% benzocaine)
carpules of 2% lidocaine with 1:100k epi given
carpules of 4% septocaine w/ 1:100k epi
```

Only the most essential prompts are included, such as **Quadrant-Select Multiple** and **Hygienist**. Fields like Medications, Blood Pressure, and BPM stay as free text for manual entry.

Step 18: Limit the prompts

In the **Clinical Note Prompts** panel, confirm that only **Quadrant-Select Multiple** and **Hygienist** are listed. Limit prompts to fields that need structured input or are critical for documentation. Remove prompts you would rather enter as free text, such as blood pressure, anesthetic amount, or plaque levels.

Step 19: Save the streamlined template

Click **OK** to save your changes. The template now prompts only for the selected quadrants and hygienist, and you can enter other details freely.

Summary

You now know how to create clinical note templates in Dentrix: choose a category, name the template, write the note text, and add built-in or custom prompts. Keeping only essential prompts reduces interruptions and leaves room for personalized details.

What's next

- Create templates for other categories, such as Hygiene, Exam, or Fillings.
- Review your existing templates and remove prompts you don't need.