How to use the perio chart in Dentrix

This guide explains how to use the perio chart in Dentrix, from opening a patient's chart and configuring entry and display settings to recording measurements and findings. It also covers the graphical chart view, exam comparisons, and restoring a missing Perio Panel.

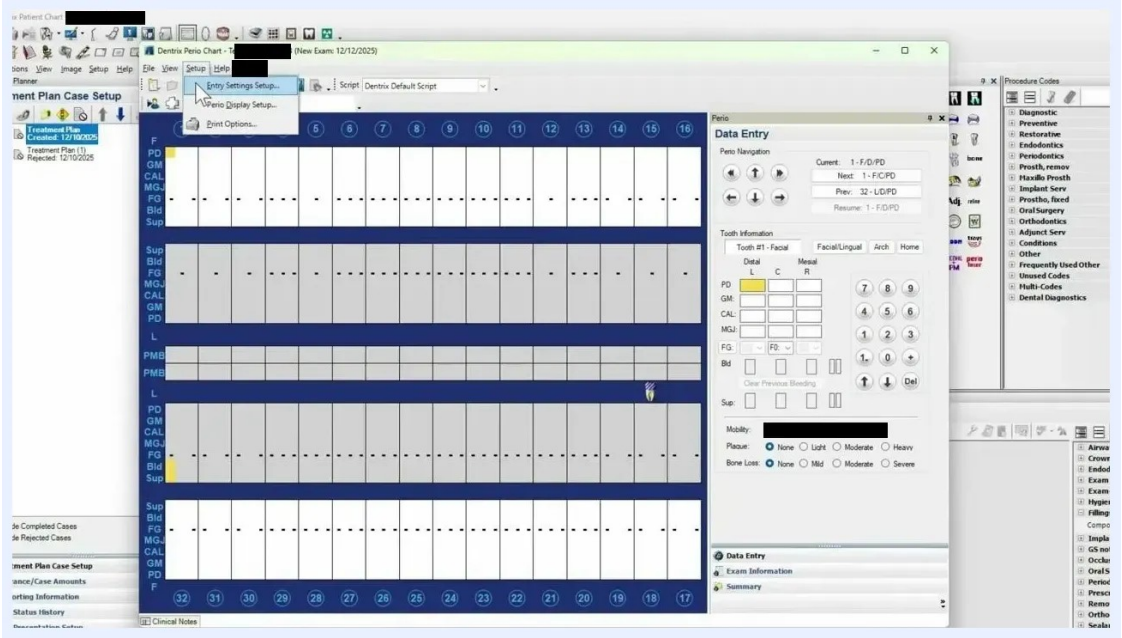
Prerequisites

- You have a patient's chart open in Dentrix.
- To compare exams, the patient needs more than one perio chart recorded in their history.

Set up the perio chart

Step 1. Open the patient's perio chart

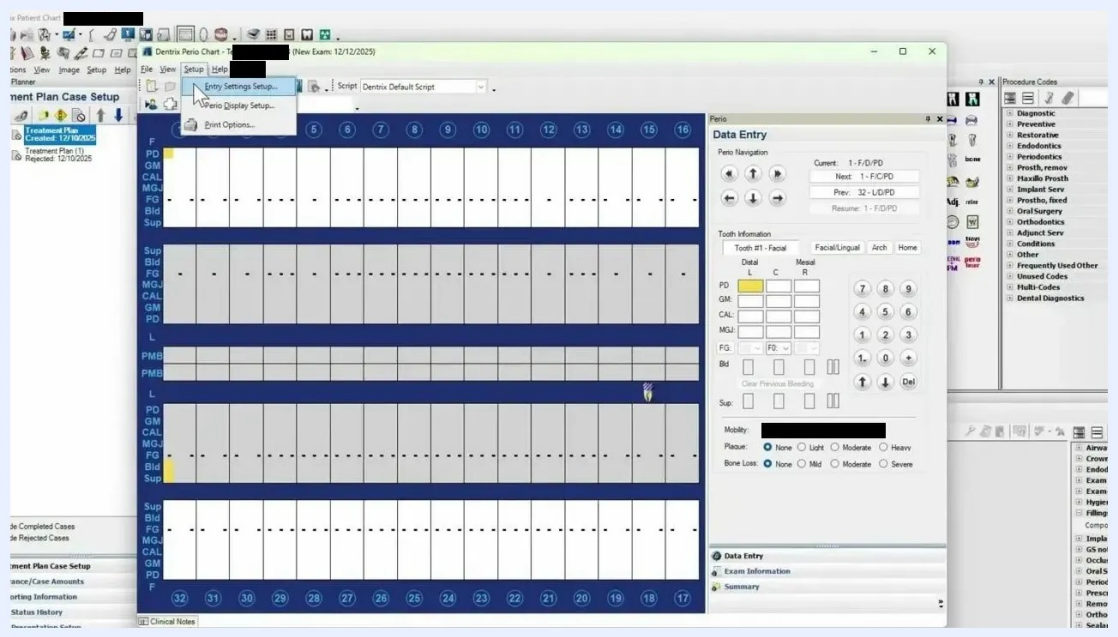
1. From the patient's chart, locate the **Perio Chart** icon.
2. Check the icon's appearance. If the patient has no perio chart, the icon appears in its default state. If a perio chart exists, the icon has a blue background.
3. Click the **Perio Chart** icon to open the patient's perio chart.



The patient's chart with tooth diagrams, navigation icons, and procedure codes, with the Perio Chart icon visible in the toolbar

Step 2. Open Entry Settings Setup

1. In the Perio Chart window, select **Setup** from the top menu.
2. Click **Entry Settings Setup...** in the dropdown menu.



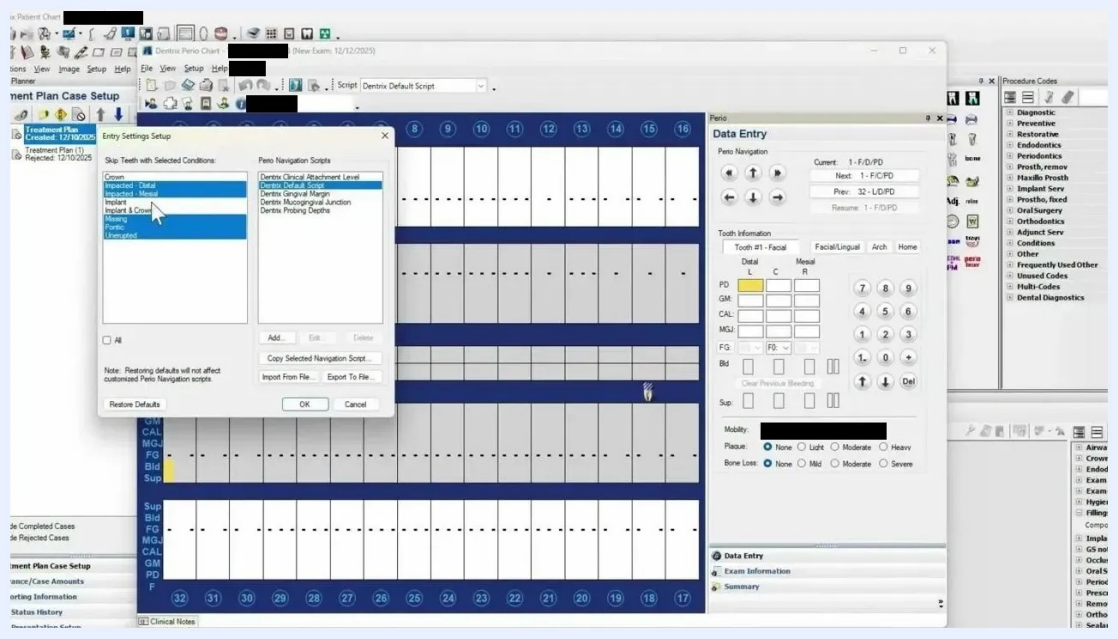
The Perio Chart window with the Setup menu expanded and Entry Settings Setup... highlighted

Step 3. Configure entry settings

In the Entry Settings Setup dialog, set the chart to skip teeth automatically based on their condition.

- Impacted (Distal and Mesial)
- Missing
- Pontic
- Unerupted

You can select or deselect additional conditions to fit your workflow. You can also choose or customize your Perio Navigation Scripts. Click **OK** to save your settings.

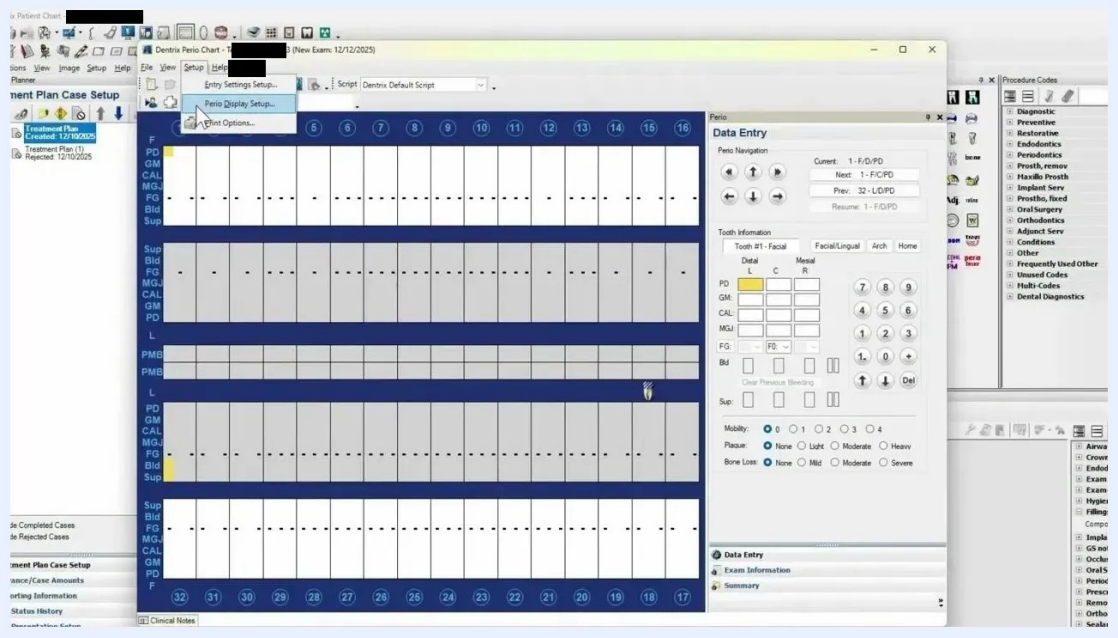


The Entry Settings Setup dialog showing the skip-tooth conditions and the navigation script options

Step 4. Open Perio Display Setup

1. Select **Setup** from the top menu.

2. Click **Perio Display Setup...** in the dropdown menu.



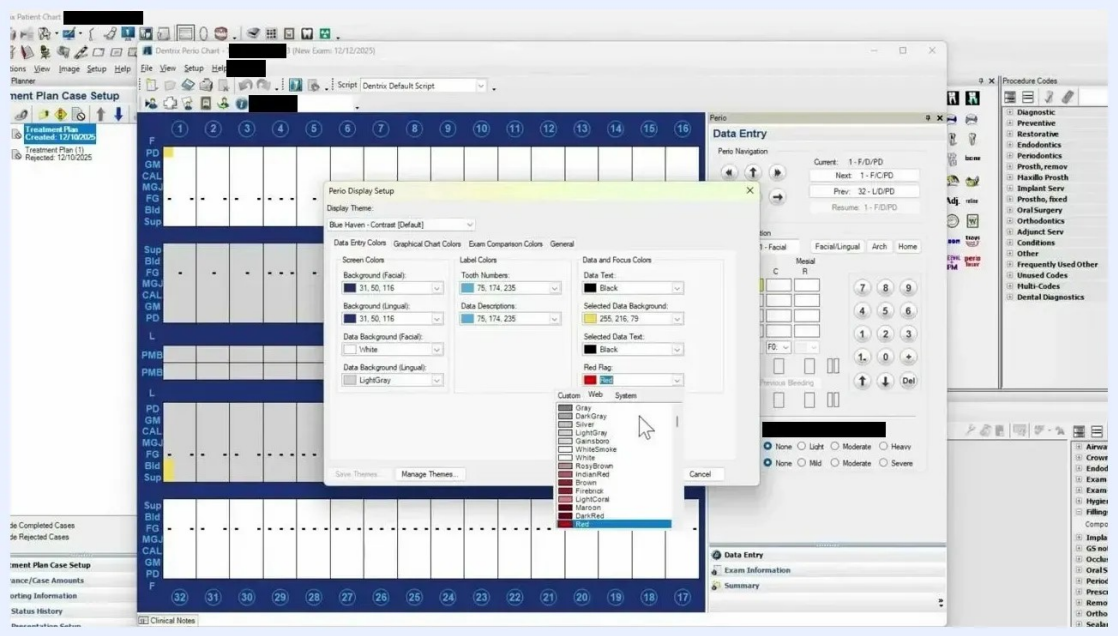
The Perio Chart window with the Setup menu expanded and Perio Display Setup... highlighted

Step 5. Customize display colors and labels

In the **Perio Display Setup** dialog, adjust the following options for your practice:

- **Display Theme:** Choose a theme, such as Blue Haven - Contrast [Default].
- **Screen Colors:** Set background colors for the facial and lingual views.
- **Label Colors:** Set colors for tooth numbers and data descriptions.
- **Data and Focus Colors:** Set the text color, the selected data background, and the red flag color. The default red flag color is red, but you can choose any color, such as DarkRed or Firebrick.

You can also use these tabs to customize further: **Data Entry Colors**, **Graphical Chart Colors**, **Exam Comparison Colors**, and **General**.

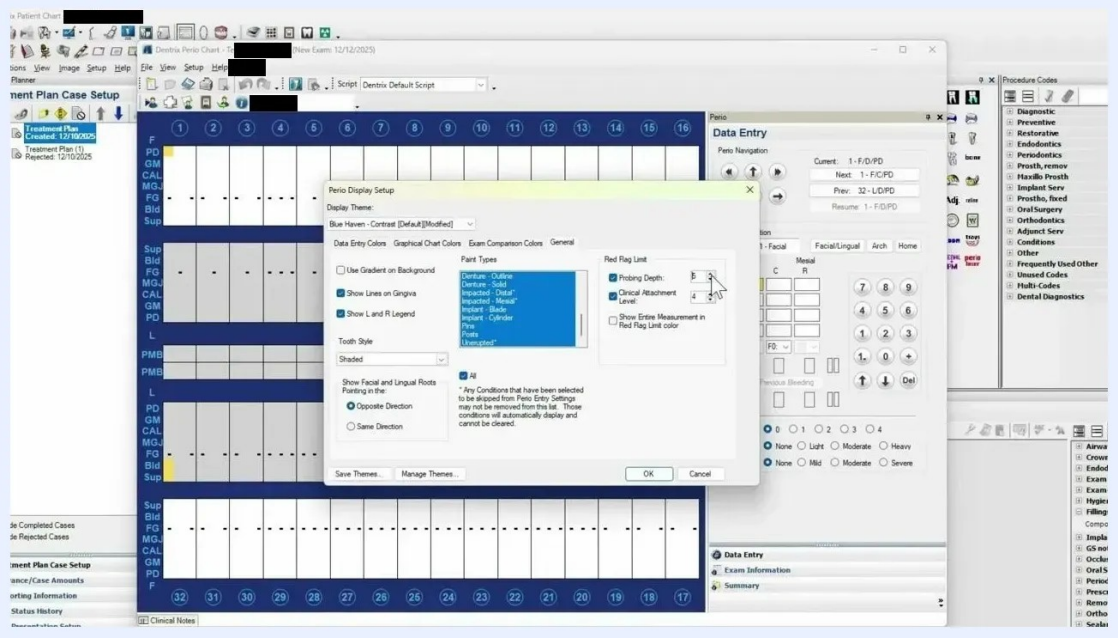


The Perio Display Setup dialog showing color options for data entry, labels, and the red flag color

Step 6. Set red flag limits and display options

1. Open the **General** tab of the Perio Display Setup dialog.
2. Adjust the **Red Flag Limit** for Probing Depth. The default is 4 mm, and you can change it to 5 mm or another value.
3. Set the red flag limit for Clinical Attachment Level.
4. Optionally, select "Show Entire Measurement in Red Flag Limit color" to highlight the full measurement.
5. Choose any additional display options: use gradient on background, show lines on gingiva, show L and R legend, tooth style (for example, Shaded), and paint types for various dental conditions.

6. Click **OK** to save your display settings.



The General tab of Perio Display Setup showing red flag limit settings and additional display options

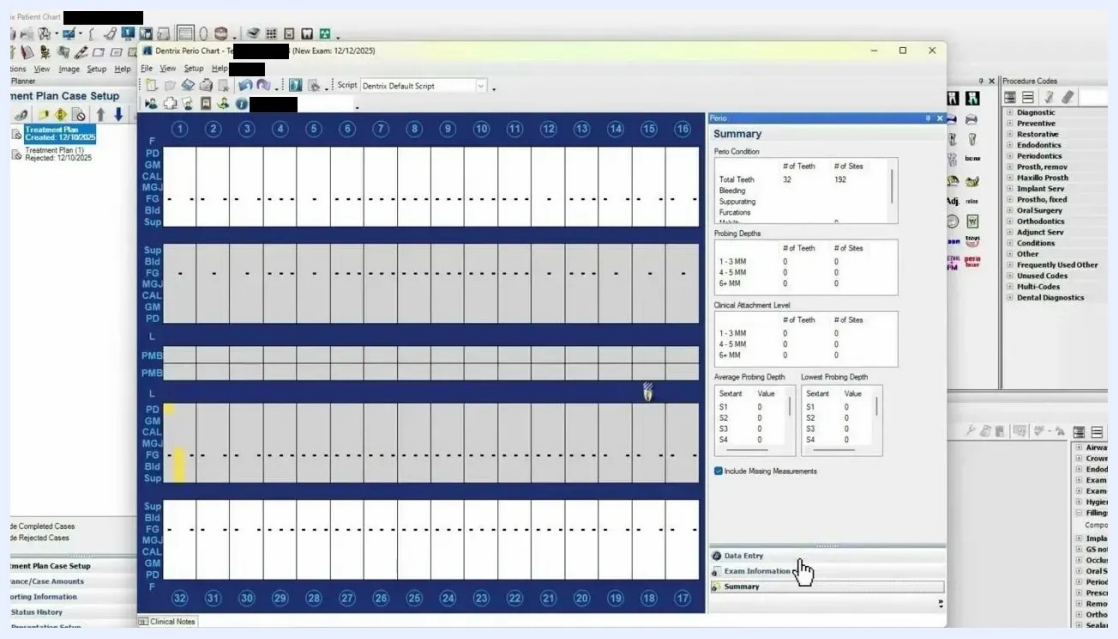
Learn the Perio Panel and scripts

Step 7. Navigate the Perio Panel tabs

The **Perio Panel** is on the right side of the Perio Chart window. Use the tabs at the bottom to switch between three views:

- **Data Entry:** Enter measurements and findings for each tooth.
- **Exam Information:** View and record detailed notes about gingiva, oral hygiene, x-rays, patient status, and periodontal diseases and conditions.

- **Summary:** Review a summary of the patient's perio condition, including total teeth, bleeding sites, probing depths, clinical attachment levels, and average probing depths by sextant.



The Perio Panel with the Data Entry, Exam Information, and Summary tabs, and the Summary tab showing perio condition statistics

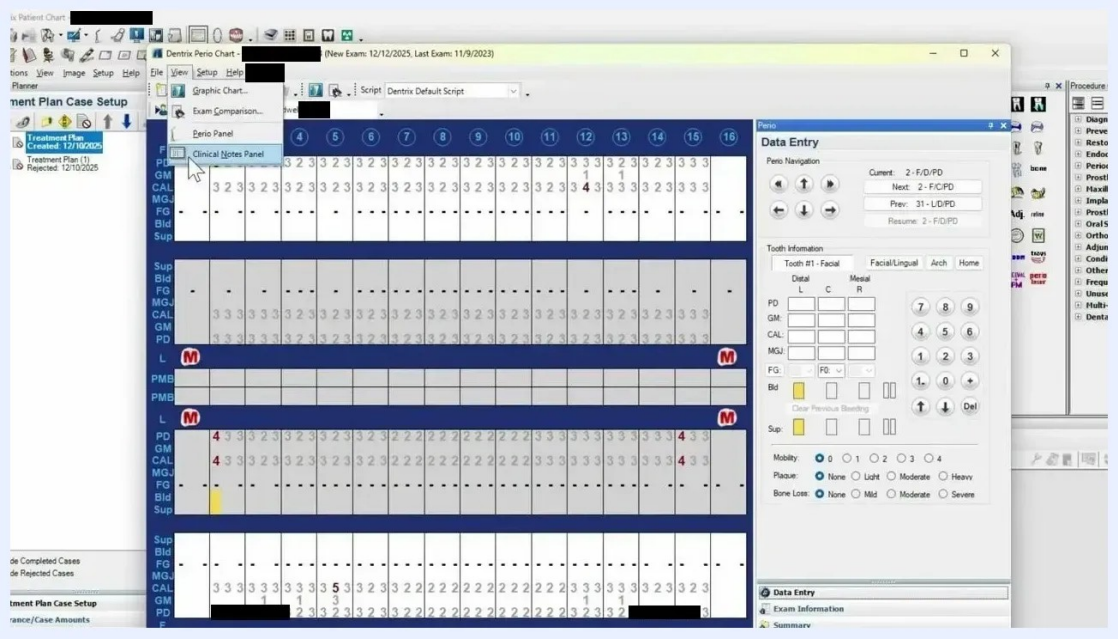
Use the tabs this way:

- **Data Entry tab:** Enter probing depths, gingival margin, clinical attachment level, furcation, bleeding, and other findings for each tooth.
- **Exam Information tab:** Record qualitative findings such as gingiva attachment, bleeding, color, contour, papillae, oral hygiene, x-rays, and patient status.
- **Summary tab:** View an overview of all recorded data, including counts of teeth and sites with specific conditions and measurement ranges.

Step 8. Switch between charting scripts

1. Locate the **Script** dropdown menu at the top of the perio chart window.
2. Click the dropdown to view the available scripts: Dentrix Default Script, Dentrix Clinical Attachment Level, Dentrix Gingival Margin, Dentrix Mucogingival Junction, and Dentrix Probing Depths.

3. Select **Dentrix Default Script** for general pocket depth charting.
4. Switch to **Dentrix Gingival Margin** or another script when you need specific measurements.



The script dropdown open, showing Default Script, Gingival Margin, Mucogingival Junction, and Probing Depths options

Enter periodontal data

Step 9. Understand the Data Entry panel

Use the **Perio Navigation** section to move between teeth and surfaces with the arrow buttons. The **Tooth Information** section lets you enter these values:

- Probing Depth (PD)
- Gingival Margin (GM)
- Clinical Attachment Level (CAL)
- Mucogingival Junction (MGJ)
- Furcation Grade (FG)
- Bleeding (Bld)
- Suppuration (Sup)

To enter data:

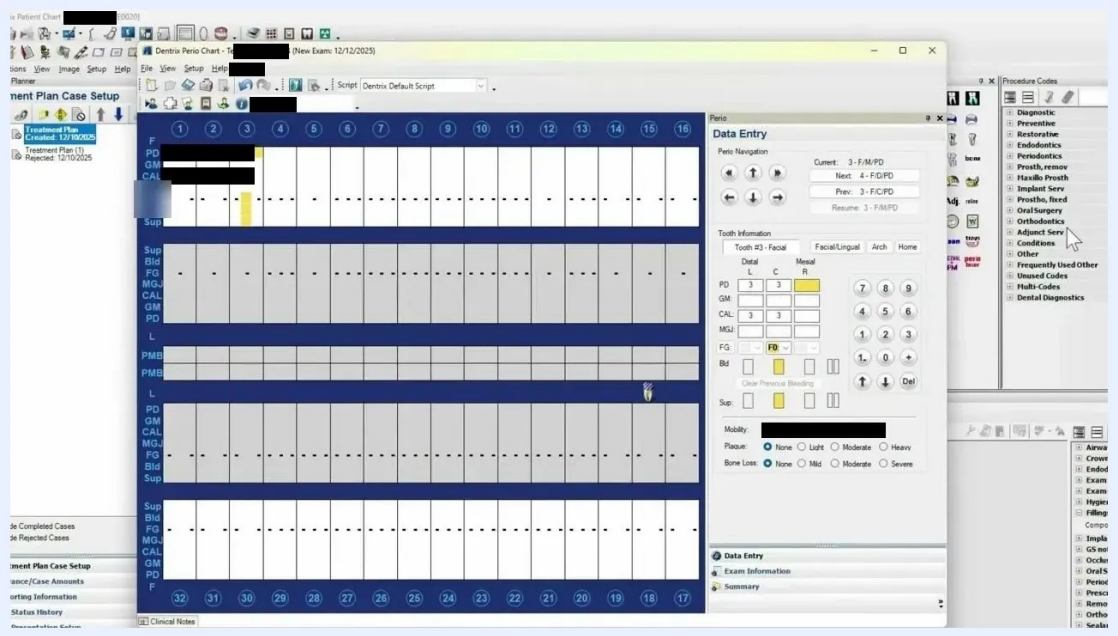
1. Select the tooth and surface, for example Tooth #4 - Facial.

2. Enter values directly into the corresponding fields, for example PD = 3, GM = 3, CAL = 3.
3. Click the colored icons to mark bleeding or suppuration.
4. Use the radio buttons below to set mobility, plaque, and bone loss levels.

The chart updates in real time as you enter data.

Step 10. View and edit measurements in the Perio Panel

All entered measurements, such as pocket depth, gingival margin, and clinical attachment loss, appear in the Perio Panel on the right side of the Perio Chart window. To edit a measurement, click the corresponding field in this panel and change the value.



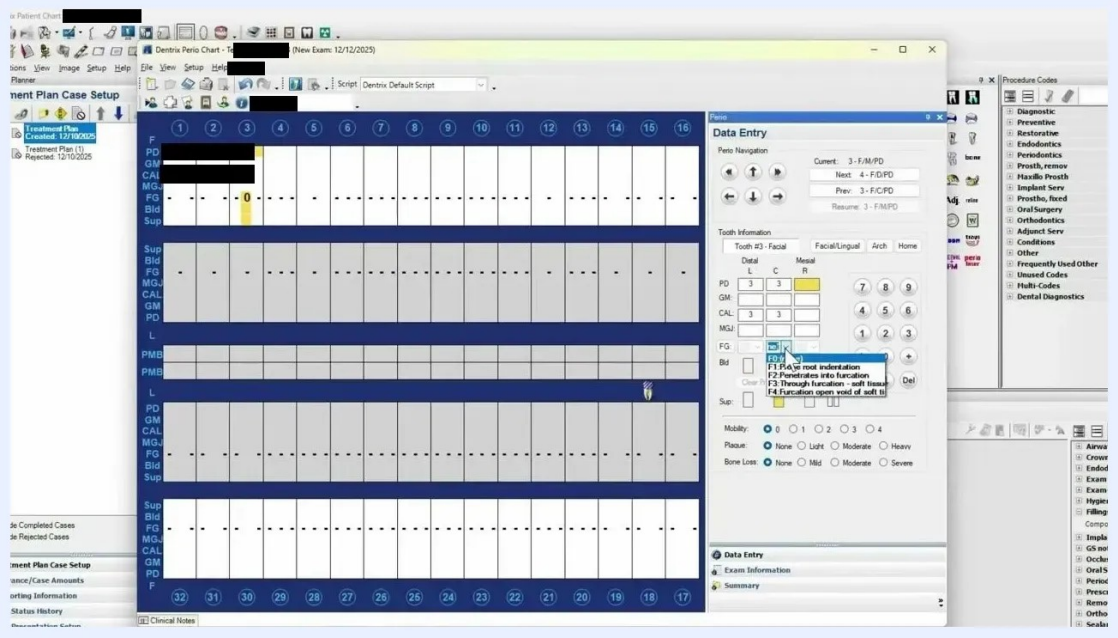
The Perio Chart with measurements for teeth 1-5 highlighted in the Perio Panel and editable fields for Tooth #3 in the Data Entry section

Step 11. Enter bleeding, mobility, furcation, and bone loss

Use the Perio Panel to enter additional clinical findings:

- **Bleeding:** Click the bleeding (Bld) boxes to mark bleeding points.
- **Mobility:** Select the mobility value (0–4) for the tooth.
- **Furcation Involvement:** Click the dropdown under **FG** (Furcation Grade) and select the grade (F1–F4).
- **Bone Loss:** Choose the bone loss level: None, Mild, Moderate, or Severe.

All changes appear on the perio chart immediately.

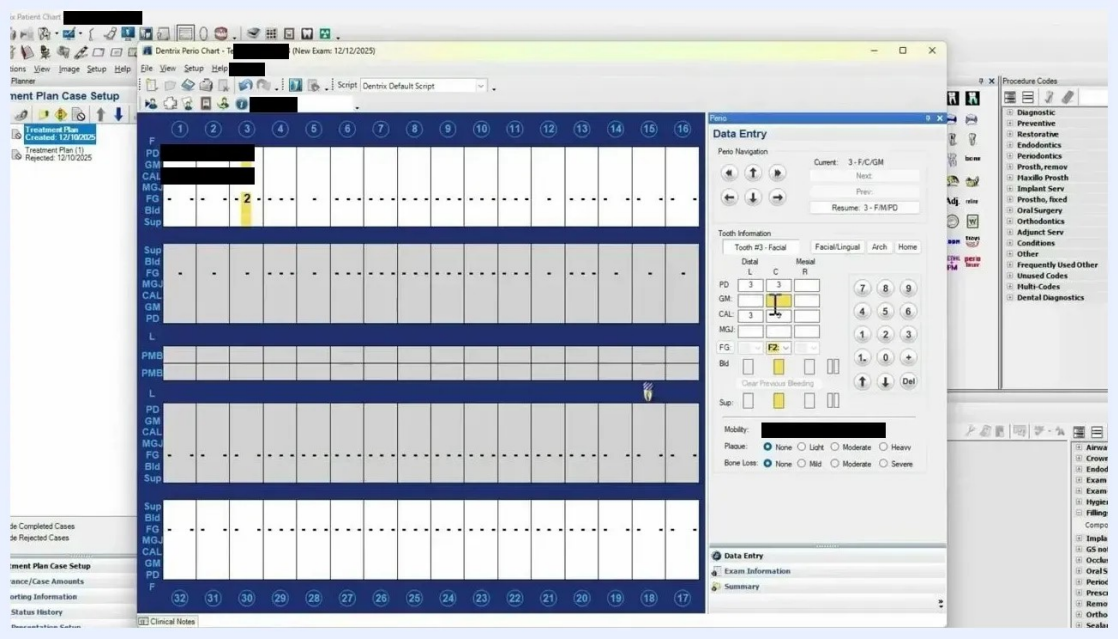


The Data Entry panel with the furcation dropdown expanded, showing the F1–F4 options

Step 12. Record gingival margin and clinical attachment loss

1. Select the tooth and site.
2. Enter the value in the **GM** (Gingival Margin) field, or click the chart cell directly to enter or edit the value.
3. Confirm the calculated clinical attachment loss (CAL).

Dentrix calculates CAL automatically by adding the pocket depth (PD) and gingival margin (GM) values. For example, if PD = 3 and GM = 2, CAL displays as 5.



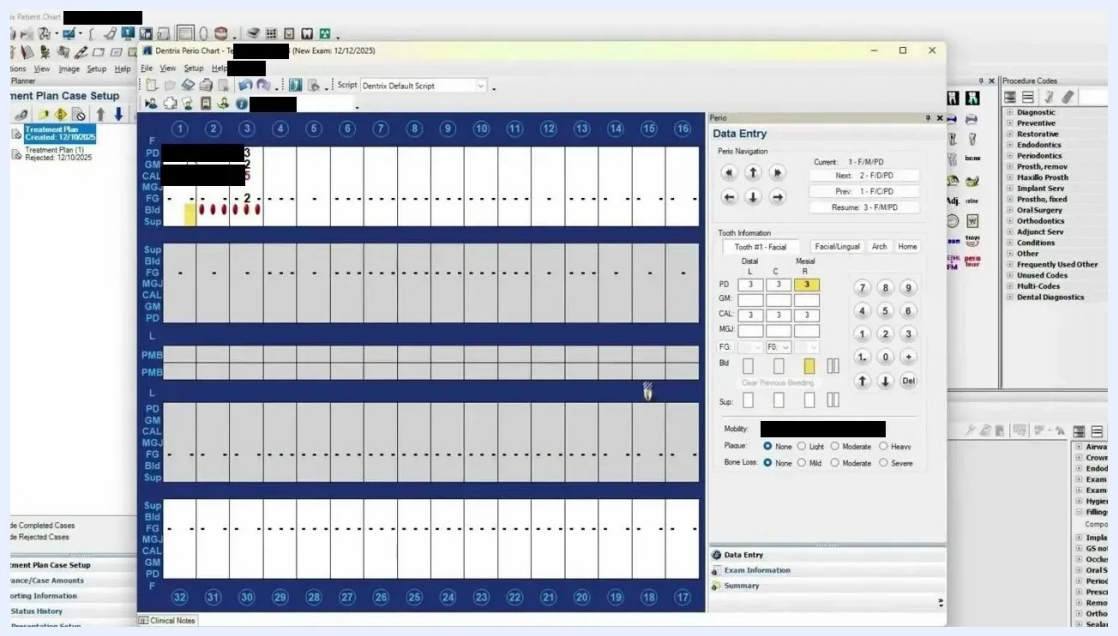
The Perio Chart and Data Entry panel with gingival margin and clinical attachment loss values entered for Tooth #3

Step 13. Mark bleeding points

You can mark bleeding points in several ways:

- Click the bleeding box in the Perio Panel for the site.
- Click the corresponding cell directly in the chart.

- Press the letter **B** on your keyboard after entering a measurement. For example, type "3, 3, 3, B" to add a bleeding point to the last site.



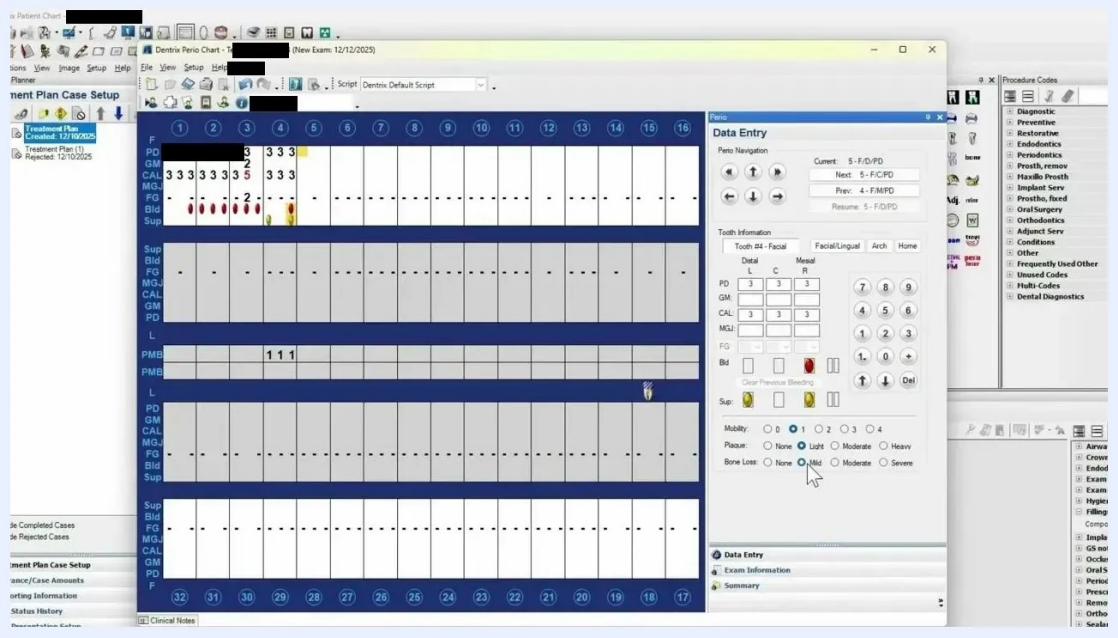
The Perio Chart with bleeding points marked in red for teeth 1-5 and the Data Entry panel showing bleeding indicators

Step 14. Record mobility, plaque, and bone loss

In the Data Entry panel, select the appropriate options:

- **Mobility:** Choose from 0 (none) to 4 (severe).
- **Plaque:** Select None, Light, Moderate, or Heavy.
- **Bone Loss:** Select None, Mild, Moderate, or Severe.

These selections appear on the perio chart for the corresponding tooth.



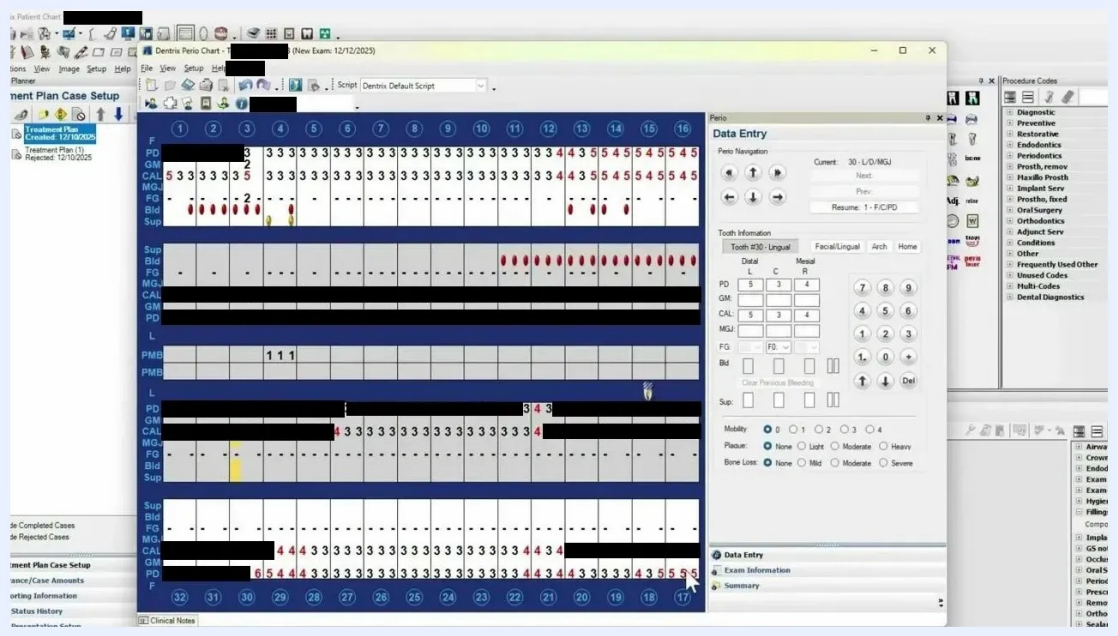
The Data Entry panel with mobility set to 1 and bone loss set to Mild for Tooth #4

Step 15. Mark bleeding on multiple teeth at once

Instead of clicking each spot to add bleeding, use click-and-drag:

1. Click and drag across the teeth or surfaces in the chart to highlight them.
2. Click the bleeding indicator in the Data Entry panel to apply it to all selected areas at once.

This method lets you quickly mark 100% bleeding or any other finding across multiple teeth.

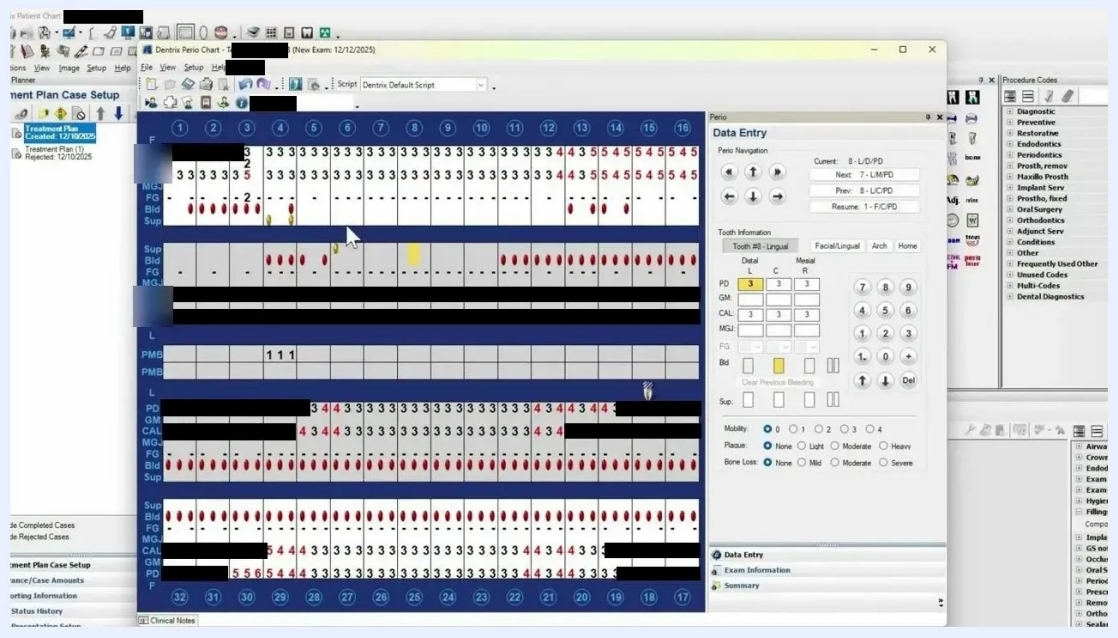


The perio chart with multiple teeth highlighted and red bleeding dots applied across many teeth using click-and-drag

Step 16. Add deep pocket measurements

1. Select the tooth and surface for the deep pocket (for example, 10, 11, or 12 mm).
2. In the **Tooth Information** section, enter the value in the corresponding field. For example, enter PD = 10 for the distal of tooth #18.

3. Check that the chart displays the value in the correct location.



The perio chart showing deep pocket measurements such as PD = 10 entered for specific teeth, with highlighted cells

Step 17. Review the chart for complete data entry

Make sure you have entered all relevant findings for each tooth:

- Pocket depth
- Gingival margin/recession
- Clinical attachment loss
- Bleeding points
- Furcation involvement
- Mobility
- Plaque
- Bone loss

Avoid incomplete charts, such as a chart with only pocket depth and no recession, bleeding, or furcation.

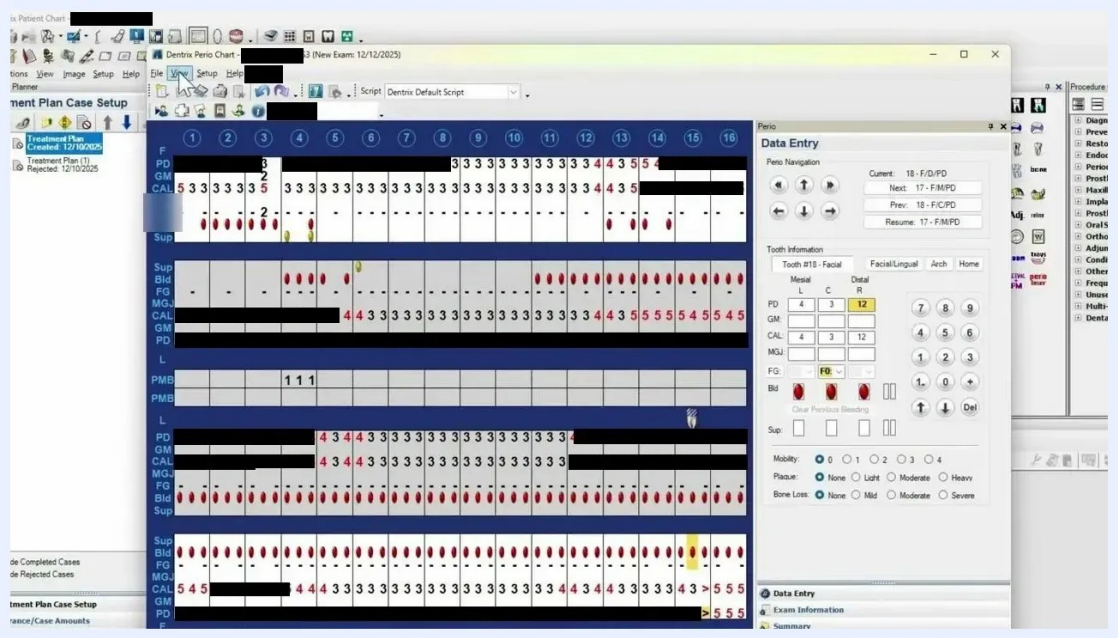
Display the chart and compare exams

Step 18. Open the graphical chart for patient education

1. In the Dentrix Perio Chart window, find the menu bar at the top.
2. Click the **View** menu.

3. Select **Graphic Chart** from the dropdown menu.

Use the graphical chart to discuss periodontal findings with your patient. This view highlights measurements, bleeding points, furcation grades, and other clinical indicators in a format that is easier for patients to understand.

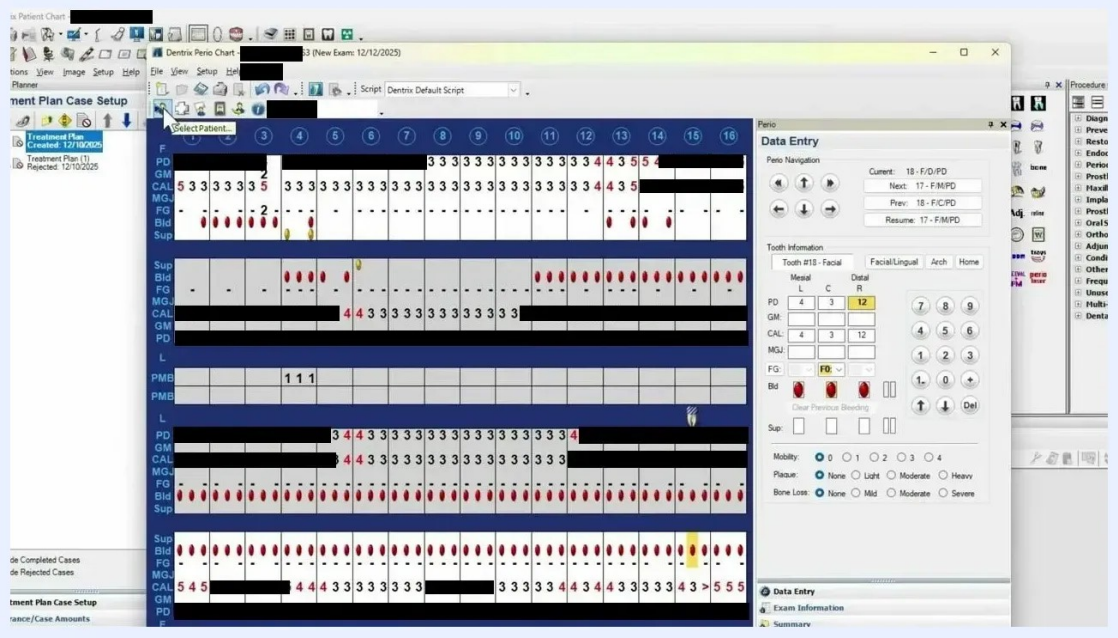


The View menu being selected in the Perio Chart window, with the graphical chart displayed and the Data Entry panel on the right

Step 19. Start an exam comparison

1. Make sure the patient has more than one perio chart recorded.
2. In the toolbar, click the **Exam Comparison** icon, or select the relevant menu option.
3. When Dentrix prompts you to select which exams to compare, choose them by date.

4. Confirm your selection to open the Exam Comparison window.

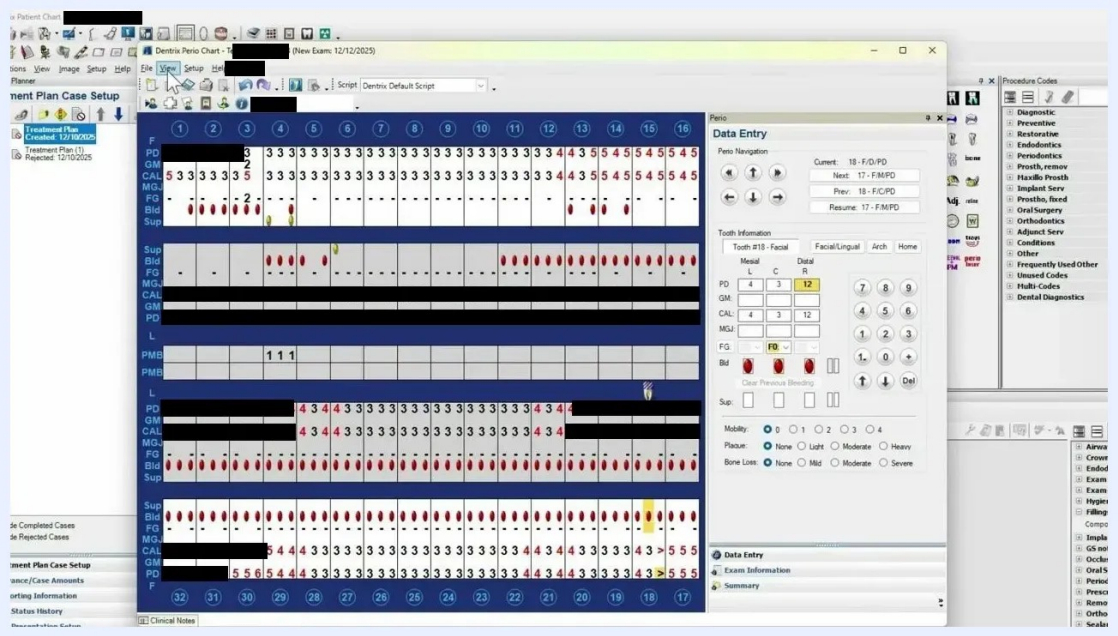


The Perio Chart with the cursor near the toolbar, ready to select the exam comparison feature

Step 20. Select the exams to compare

1. In the **Select Exams** dialog, choose the dates of the exams you want to compare, for example 11/9/2023 and 1/4/2023.
2. Click **OK** to generate a side-by-side comparison of the selected perio charts.

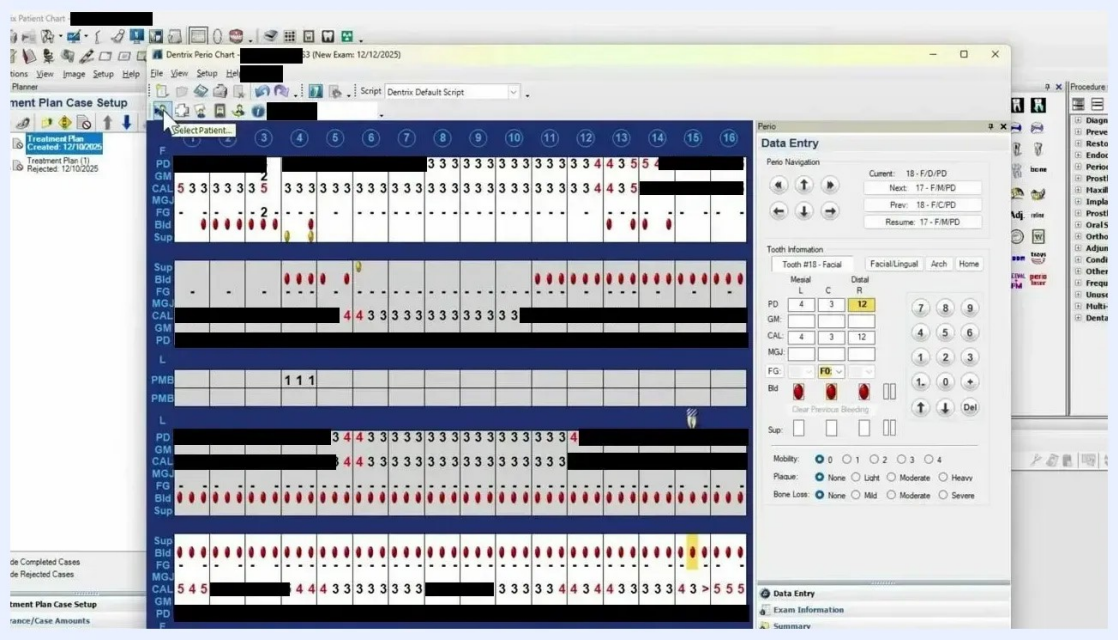
The comparison window shows measurements from each exam, with changes highlighted for easy review.



The Select Exams dialog open, with multiple exam dates available for comparison

Step 21. Review the Exam Comparison window

The **Exam Comparison** window overlays the main perio chart. It shows two sets of measurements for each tooth and surface, one for each selected exam date. A **Change** row appears between the two dates and shows the difference in measurements. Use this side-by-side view to quickly identify changes in periodontal status.



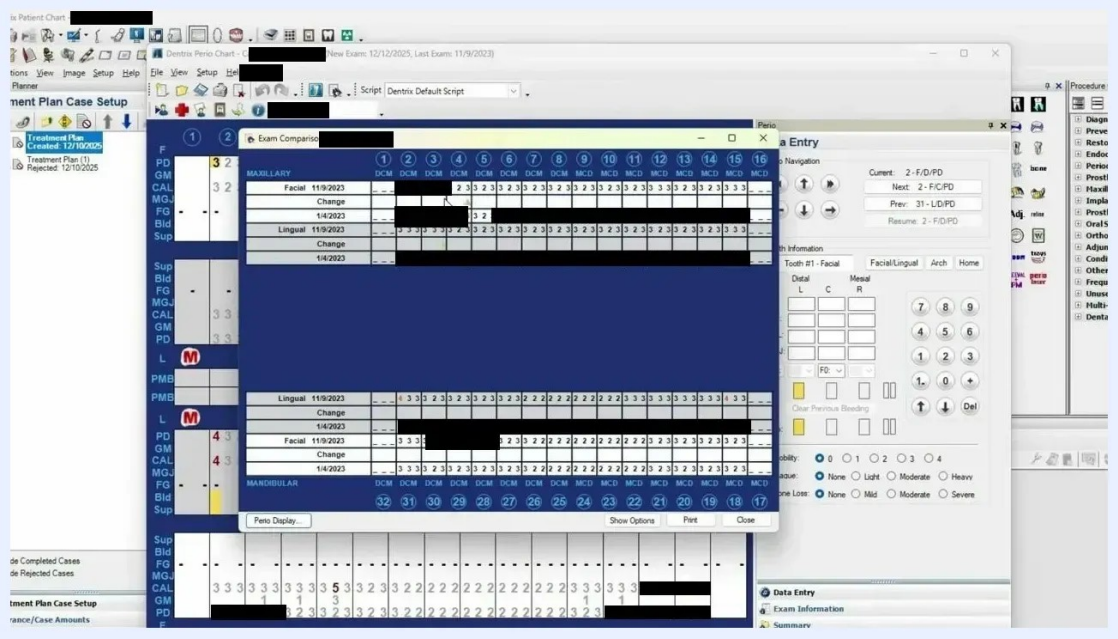
The Exam Comparison window showing two exam dates and a Change row for each tooth and surface, with the Data Entry panel visible on the right

Step 22. Interpret the visual change indicators

In the **Change** row, look for colored triangles:

- Green triangles pointing up indicate improvement, such as reduced pocket depth.
- Red triangles pointing down indicate decline, such as increased pocket depth.

These cues help you and your patient see where periodontal health has improved or worsened. Use them to guide patient education and treatment planning discussions.

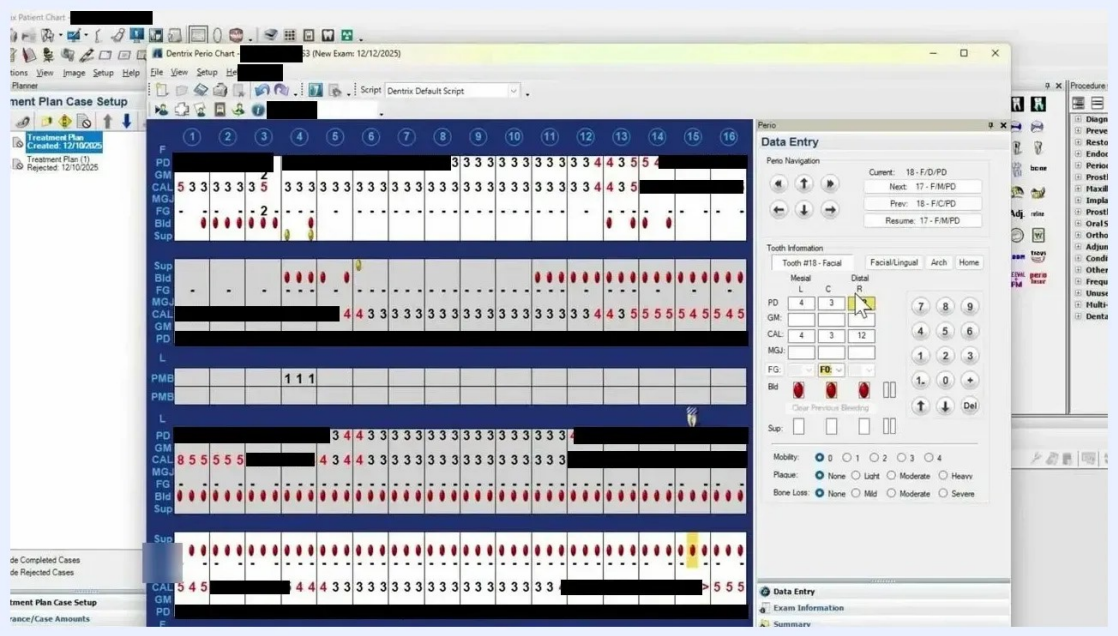


The Exam Comparison window with green and red triangles in the Change row showing improvement or decline in periodontal measurements

Step 23. Return to data entry for additional findings

1. Close the comparison window to return to the main perio chart.
2. Continue entering or updating findings, such as deep pocket measurements or additional furcation grades.

3. Use the Data Entry panel to input values, for example PD = 12 on the distal of Tooth #18, and mark clinical findings.

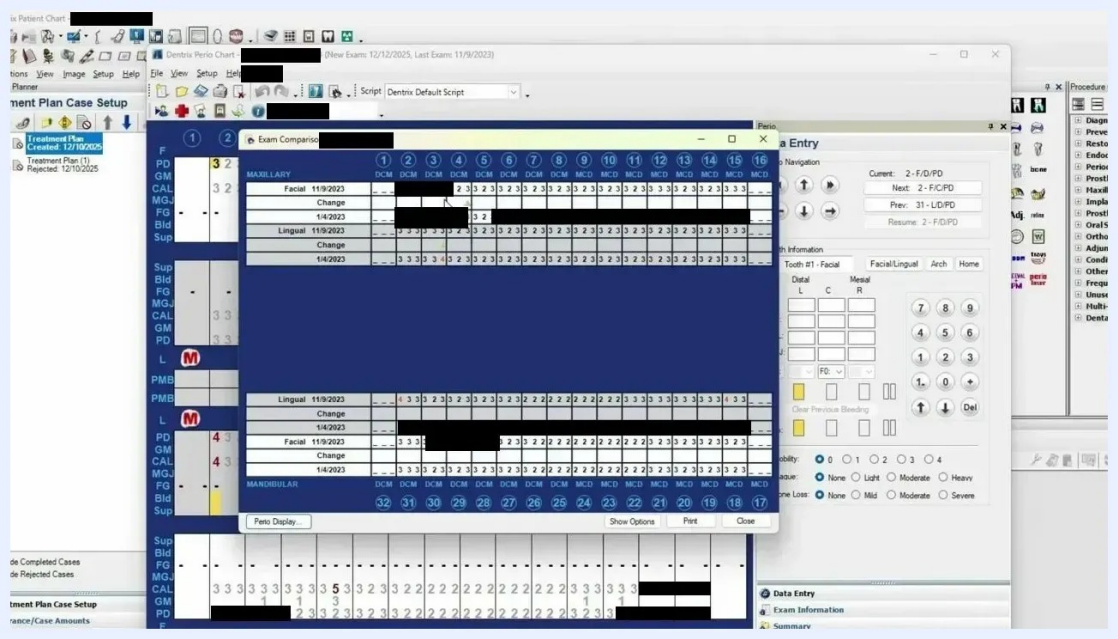


The Perio Chart with the Data Entry panel active and ready for further periodontal measurements and findings

Troubleshoot and use clinical notes

Step 24. Restore a missing Perio Panel

Users sometimes close or hide the Perio Panel by accident. When this happens, the screen shows only the Data Entry panel and a blank or reduced chart area, with no detailed Perio Panel visible.

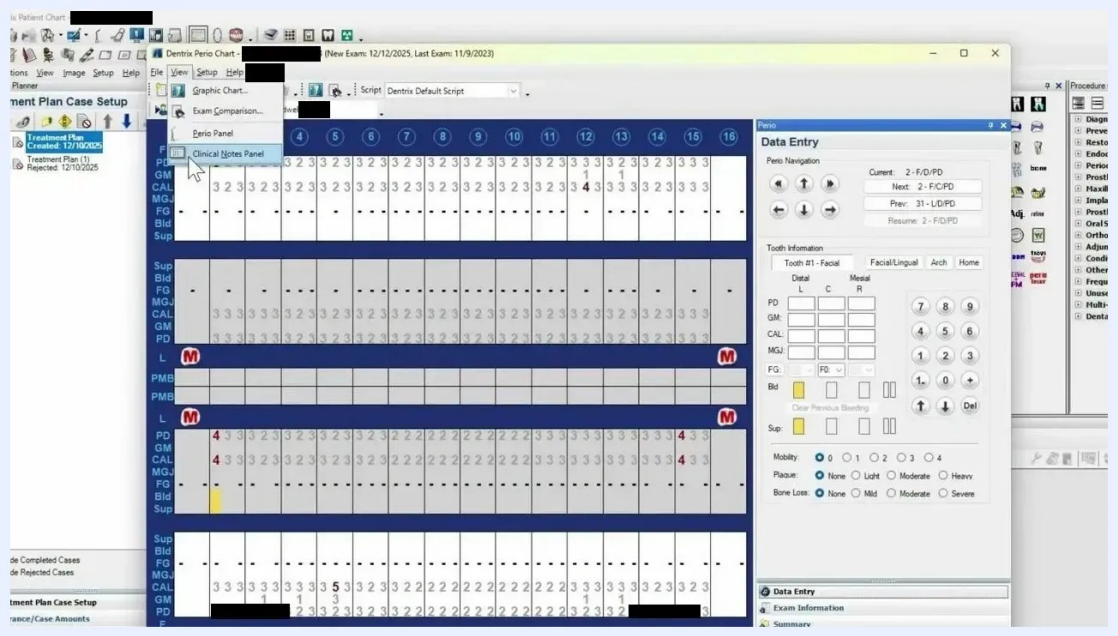


The perio chart with the Perio Panel missing, showing only the Data Entry panel and a blank chart area

To restore it:

1. Click **View** in the top menu bar.
2. Select **Perio Panel** from the dropdown menu to restore the periodontal chart display.

This menu also gives you access to other panels, such as **Clinical Notes Panel**.



The View menu open, showing Graphic Chart, Exam Comparison, Perio Panel, and Clinical Notes Panel options

Step 25. Open the Clinical Notes Panel

1. Click **View** in the top menu bar.
2. Select **Clinical Notes Panel** to bring up the patient's basic clinical notes.

You can review existing notes or add notes relevant to the patient's periodontal status.

Summary

You now know how to use the perio chart in Dentrix. You can open the patient's perio chart, configure entry and display settings, and record measurements and clinical findings. You can also show the graphical chart to patients, compare exams over time, and restore the Perio Panel or open the Clinical Notes Panel from the **View** menu.