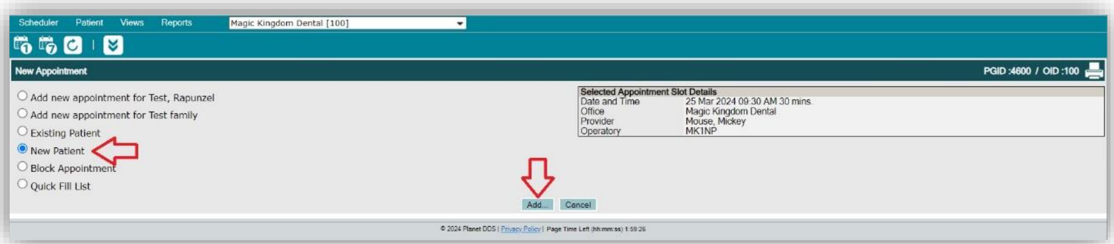
## New Patient – Create Appointment:

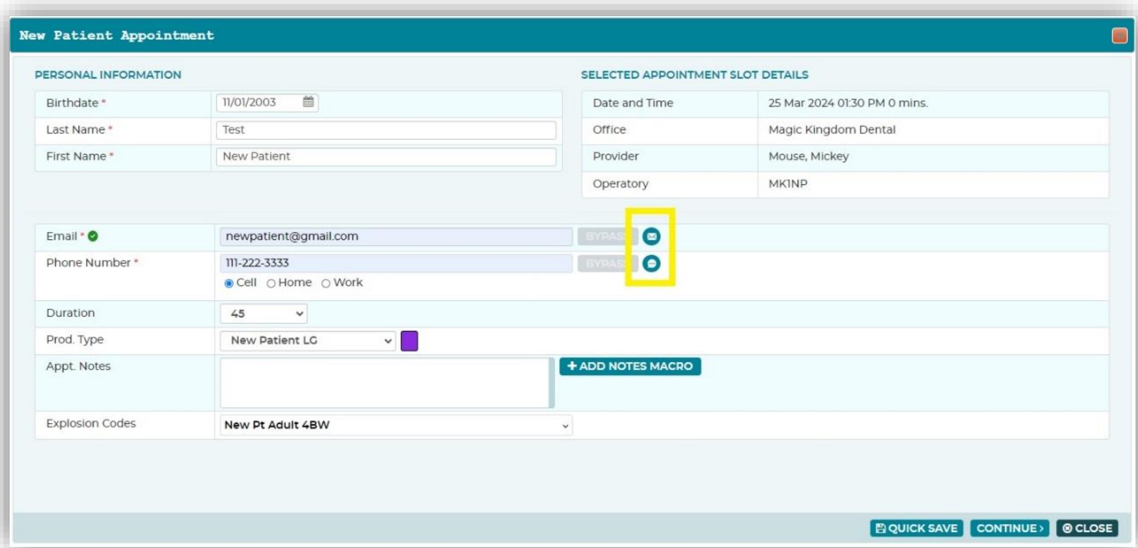
This guide will walk you through the steps to efficiently:

- Create a New Patient Appointment using Quick Save
- Send E-Form request
- Create New Patient's record during chart audit by Importing E-Forms

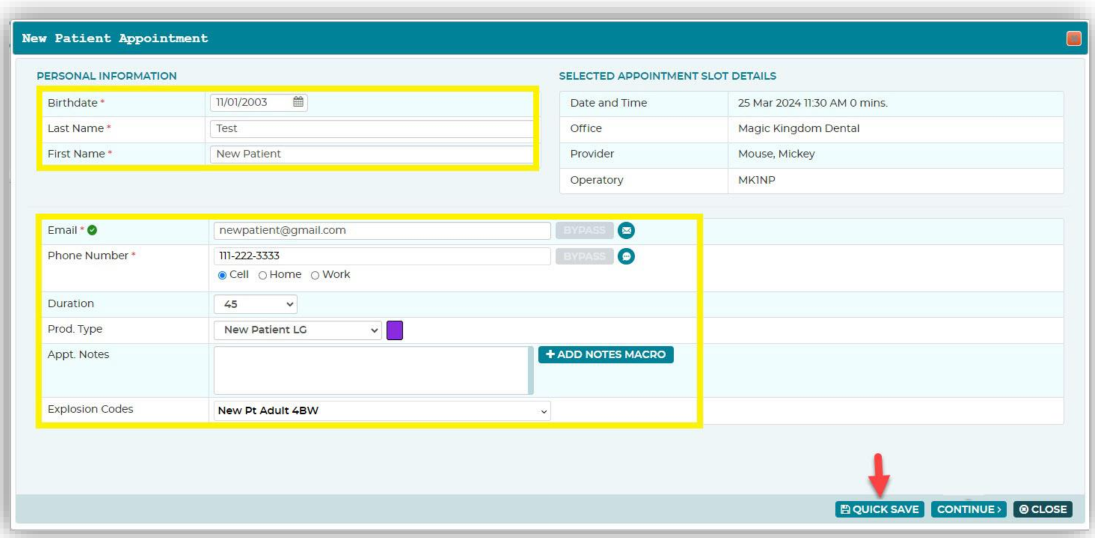
1. Locate an appropriate New Patient slot either through **Find Slot (New)**, or right clicking on an opening and selecting **Add New Appointment**, or double clicking on the desired opening in the schedule. In the New Appointment window, change the radio button on the upper left to **New Patient**, then click **Add**.




2. Fill in the **E-mail** or **Cell Phone** information to enable sending of the **E-Forms for Patient Registration**. Use the icon to the right of the appropriate field to send the registration link to the patient.



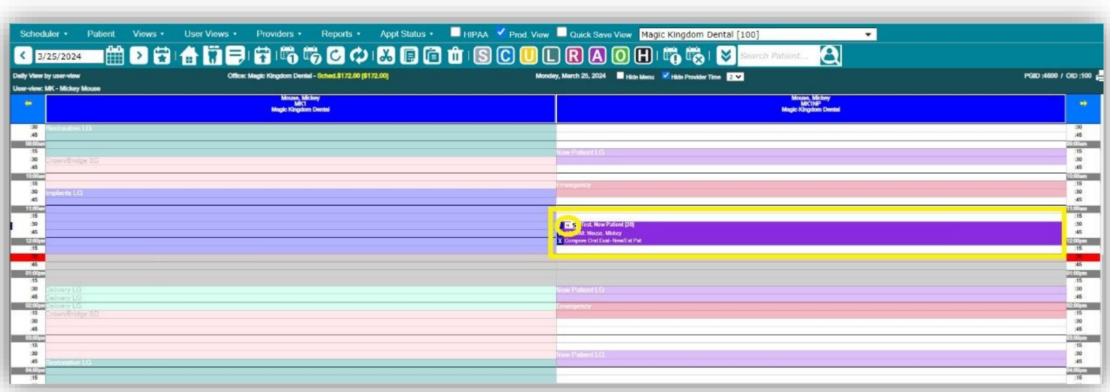
3. Fill in the remaining sections of the New Patient Appointment window, and click **Quick Save**. This **bypasses the process of adding the Patient record** for this patient. This allows the team to quickly appoint the patient, and only add the record once the patient arrives in the office.




**TIP**: *Double check to make sure the patient's Birthdate, First and Last name are accurate to ensure the E-Forms will import correctly.*

**TIP**: *Create a NOTES MACRO to collect insurance information from the caller, if desired.*

4. The appointment appears in the schedule with an N icon in the top left corner of the appointment, indicating this is a New Patient Placeholder appointment.

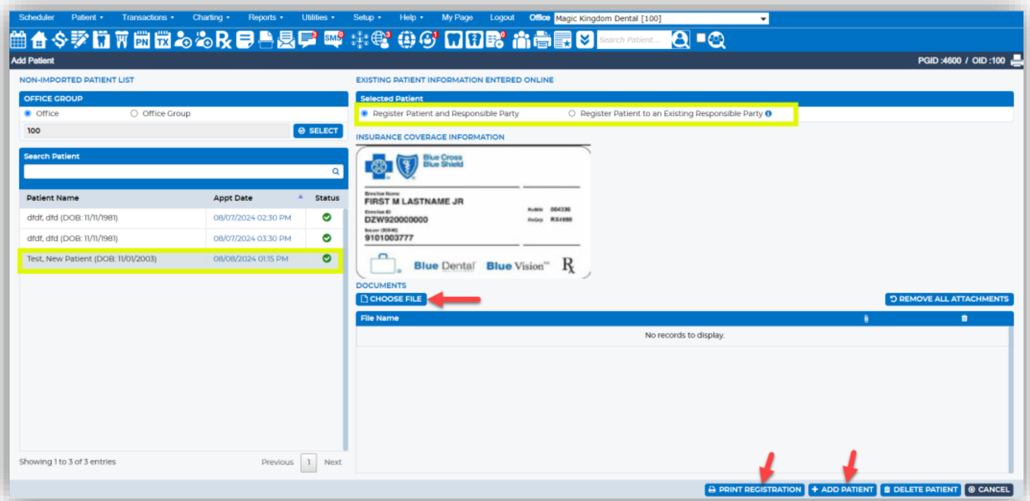



**TIP:** *If you forgot to send the registration link when creating the appointment, simply double click on the appointment in the scheduler to open, and use the icon to the right of email or cell phone.*

## Import Online Patient Registration – New Patient:

1. Access the forms on the Main Denticon Window by clicking the icon for Online Patient Registration.

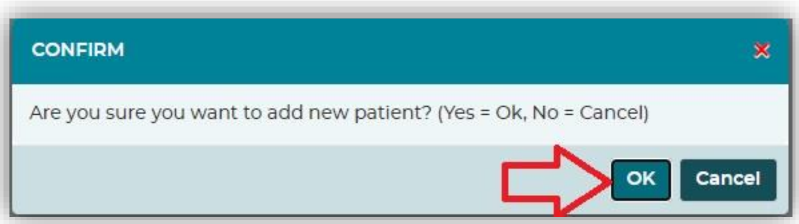
2. Find your patient, **click** the record to select them, and select appropriate registration radio button. You may need to click **Print Registration** to determine the correct button. Click **Choose File** to upload additional attachments to this Online Registration. Finally, click **Add Patient.**



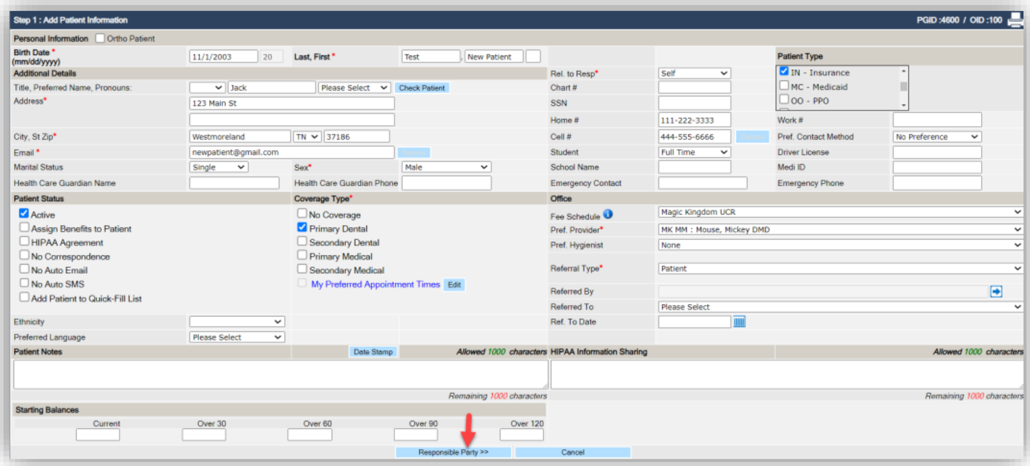

**TIP**: *A red triangle indicates the patient has not yet completed the online registration forms. Advise the patient to complete the forms online before continuing.*

**TIP:** *If the patient information filled in online does not match the DOB and Name on file for the placeholder appointment, a dash will be in the status column.*

3. Click OK on the popup

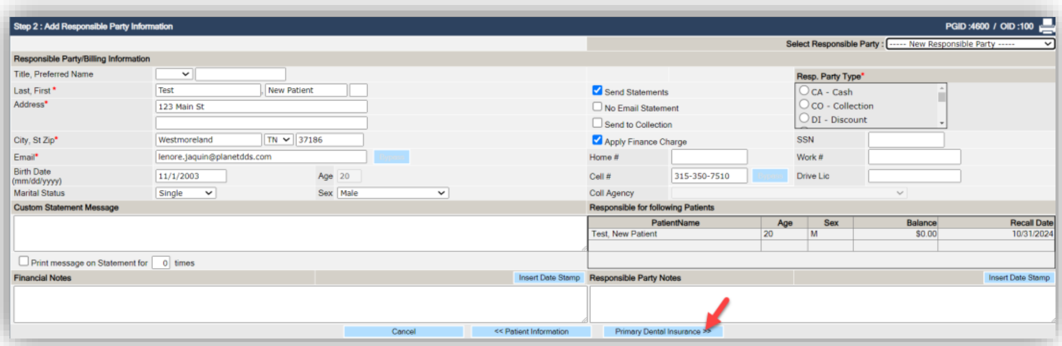


4. Complete the required and desired optional fields on the **Add Patient Information** screen. *The information the patient filled out in the online form will be filled in for you*. When done, Click **Responsible Party >>** to continue.




5. Fill in Responsible Party required and desired optional fields, and click **Primary Dental Insurance >>.**

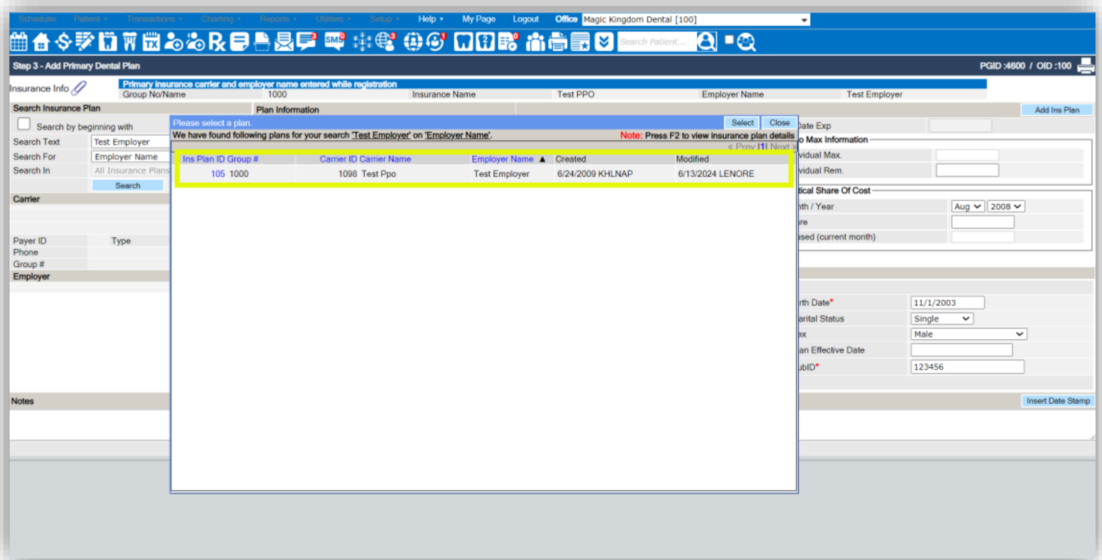
   - If the patient does not have insurance the button available will be **Medical Information >>.** In this example since the **Primary Dental** box was checked on the prior screen, Primary Dental Insurance is the next step in the process.



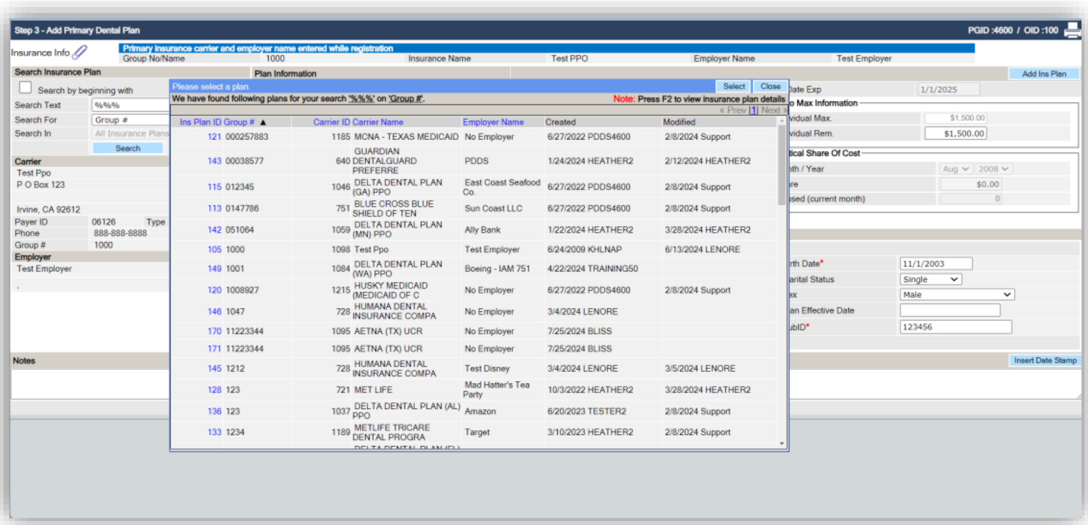

**TIP**: *If the plan the patient has must be created in order to attach to this file, select the Responsible Party type of **Needs Update**, and click **<< Patient Information** to click the box for **No Coverage**. This will allow you to complete the patient record import and add the insurance at a later time.*

6. If Denticon finds a match between the information the patient entered online to a plan already entered for your office, it will display it in the **Please select a plan** box, as shown. If there is no match, you will need to search for the appropriate plan as normal.

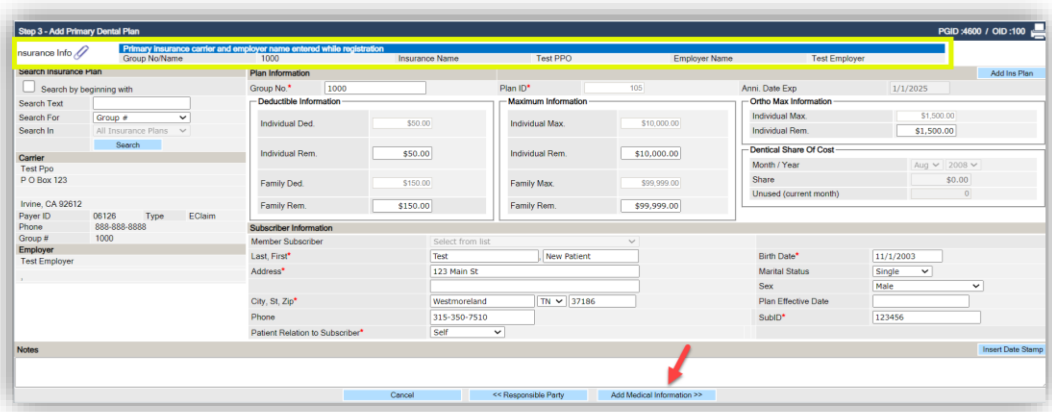
**Match exists; Click to review, and select:**



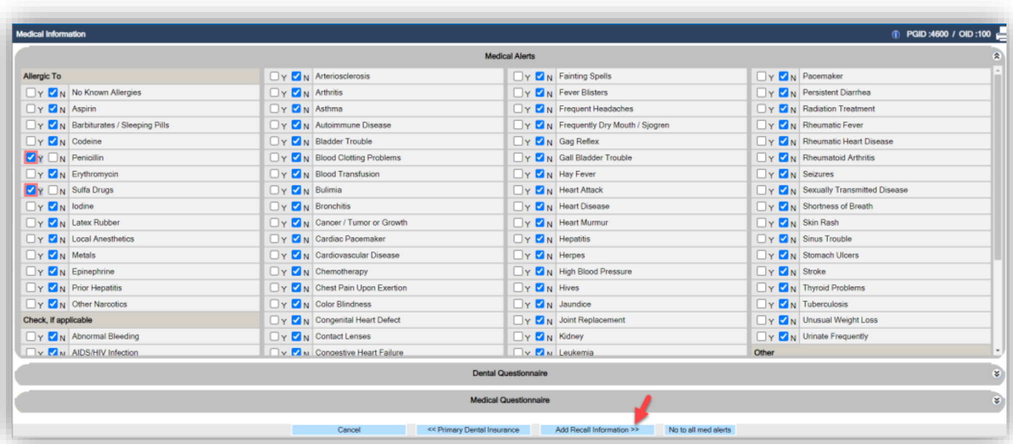
**No Match; Search for matching plan:**



7. Fill in the remaining desired information on the screen, and click **Add medical Information >>**.
   - Note at the top of this screen, you can view the information the patient entered online. To view the insurance card image, click the **paperclip** icon.

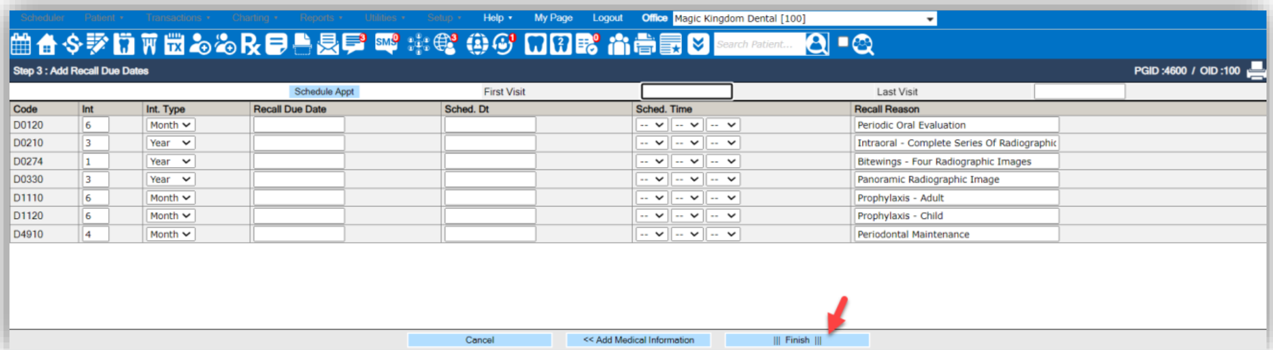



8. Verify the information required by your practice is complete. When complete, click **Add Recall Information >>**

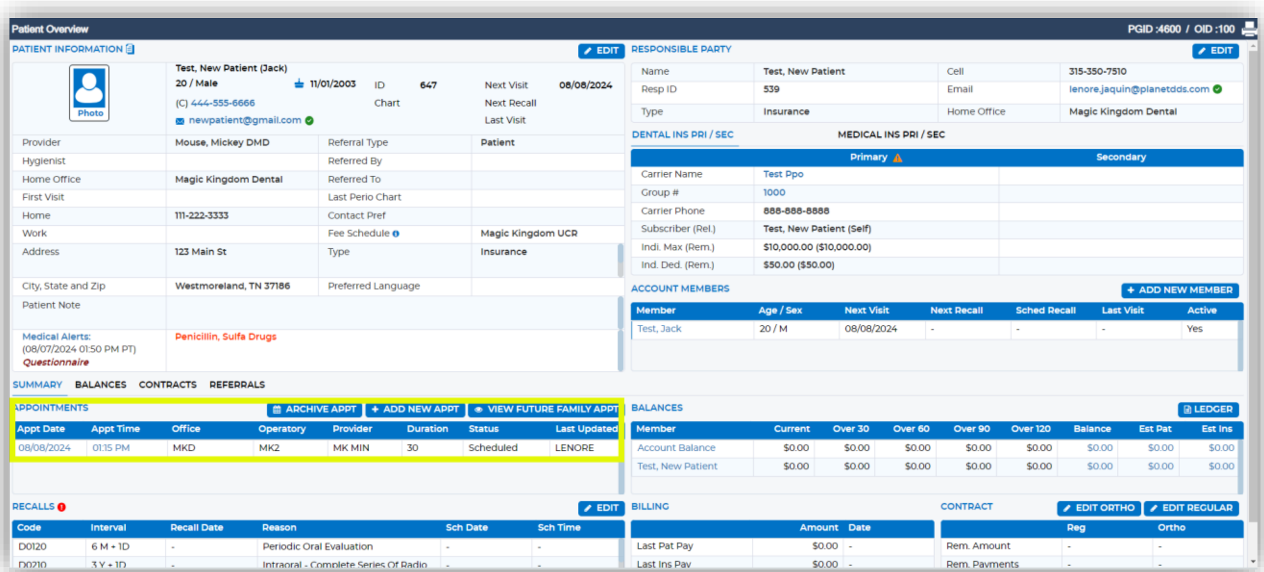



**TIP**: *If there is missing or incomplete information and the patient is not in the practice, make a note of what is missing and create a flash alert for the team to complete the information once the patient arrives, or call the patient to update.*

9. Add recall due dates if needed, and click **Finish**.




10. Denticon will route to the **Patient Overview** screen for the record you created, and link this patient's record to the appointment.




***TIP***: *If the appointment does not connect, take note the birthdate, and spelling of first and last name matches the patient appointment that was created originally.*

11. To verify the process worked, return to the scheduler and refresh the screen. The **N icon** should no longer appear in the top left of the patient appointment, and when you right click all the **Go To** navigation is now available.