New Patient Workflow

Create Placeholder Appointment

Create Appointment

- Double click on opening in the schedule
- Select **New Patient** bubble
- Click **Add**

- Fill in **Required fields**
- Select appropriate **Duration**, **Production Type**, and **Explosion Codes**
- Enter **chief complaint** in **Appt Notes**

- For patients using insurance, select **Add Notes Macro**
- Select **Insurance** category
- Select **NP Insurance Info** macro
- Fill in the available details

- Click e-mail and/or text icon to send online registration link
- Click **QUICK SAVE**

Monitor Online Registration Completion

Monitor the **Online Registered Patients** icon in the main Denticon Window for **completed registrations**

Monitor the **Schedule** in Denticon for future new patient appointments that do not have a patient record created

- Click on the record(s) with **completed registrations** indicated with the **green check icon**
- **Print Preview** to determine correct selection to add patient, and validate **registration is complete**

Records with a red triangle indicate the patient has **not** completed the online registration.

- Navigate to the schedule to **locate** the **appointment**

- Find all appointments with the **small N icon** next to the appointment status

- Make selection for **adding new** or adding to an **existing responsible party**
- Click **choose file** to upload additional documents with patient registration
- Click **Add Patient**

- **Contact patient** to remind them to **complete the online registration**

OR

- **Advise patient to arrive 30-minutes earlier** to complete the paperwork in the office
  - **Print paper registration** forms for the patient to complete on site, so an account can be created

- **Complete** the screens to add the **patient record**
  - **NOTE**: Denticon will attempt to match and attach the insurance plan from the information entered
  - If insurance plan does not yet exist, choose **Responsible Party type of NU** to indicate record still needs updating