



Denticon - Basic Clerical

Introduction to Denticon



Contents

Understanding the Denticon Interface 3

How to:

Search for a Patient 5

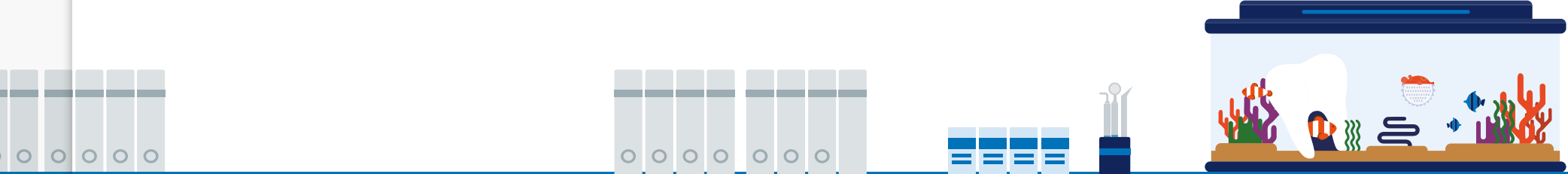
Edit Patient Information..... 7

Access Patient Notes and Open Attached Documents 8

View the Schedule 9

Search for an Insurance Plan..... 10

Access the Help Portal 12



Understanding the Denticon Interface

The screenshot displays the 'My Page' interface in Denticon. At the top, a navigation bar contains various icons and a 'My Page' button. Below this, the 'DENTILYTICS BASIC' section features two gauge charts: 'MTD NET PRODUCTION VS. GOAL' at 0% and 'MTD COLLECTION AS % OF NET PRODUCTION' at 148%. Below the gauges are three data boxes: 'Net Production MTD: \$16,772', 'New Patients MTD: 17', and 'Continuing Care Exams MTD: 0'. The 'ANNOUNCEMENTS' sidebar on the right lists 'Denticon News', 'Planet DDS Webinar', 'Support Webinar', and 'Product Release'. The 'TICKLER' section at the bottom left shows a table with columns 'FROM', 'SUBJECT', 'PHONE', 'POST DATE', and 'CREATED DATE', and a message 'No Tickler Message Found.' The footer contains copyright information: '© 2021 Planet DDS | Privacy Policy | Page Time Left (hh:mm:ss) 1:59:0'.

Tip 1

Each time you login to Denticon, you will enter the 'My Page' screen. Here you will find useful information tailored to you and your practice:

- **Dentilytics** – an easy-to-read dashboard containing a set of tools that analyze your practice data.
- **Tickler** – a messaging inbox where communication from other staff or personal reminders are stored.
- **Announcements** – a sidebar that brings you current industry news, educational and support webinars, and product alerts.

Note: You can return to My Page at any time by clicking the **My Page** button in the toolbar.

Tip 2

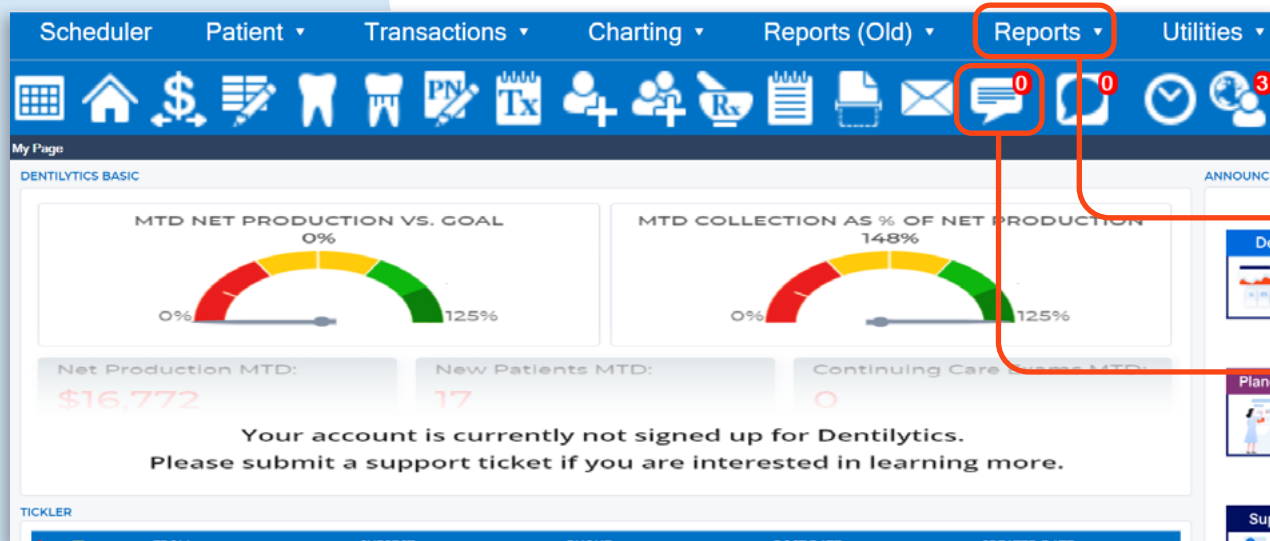
The toolbar is key to navigation around Denticon. It is split into two sections:

The **top section** contains **dropdown menus** and **buttons** to help you easily navigate to a particular area or to begin a specific task.

Note: Red notification badges on icons highlight any messages or items that require your attention.



The **lower section** contains several **icons** and a **patient search function** that give you quick access to a variety of pages and some commonly performed tasks.



For Example:

Clicking **Reports** will show you a menu of reports that you can run for your practice.

You can check your tickler messages by clicking directly on the **Message** icon in the toolbar.

Core Task 1: How to Search for a Patient

There are three ways to search for a patient in Denticon:

Option 1

Using the 'Search Patient' box in the toolbar, type the patient's last name and click the **blue arrow** to search. Then select a patient record.

Note: To narrow your search, type the patient's last name, a comma, and the initial of their first name e.g., 'Howard, W' for patient William Howard.

The screenshot shows the Denticon software interface. At the top, there is a navigation menu with options like Scheduler, Patient, Transactions, Charting, Reports (Old), Reports, Utilities, Setup, Help, My Page, Logout, and Office. Below the menu is a toolbar with various icons. A search box in the toolbar contains the text 'Howard' and a blue arrow icon. Below the toolbar is a search form with the following sections:

- Search Patient or Responsible Party:** Includes a search box and a 'Search' button.
- Search For:** Radio buttons for 'Patient' (selected) and 'Responsible Party'.
- Search By:** Radio buttons for 'Last Name' (selected), 'First Name', 'Nickname', 'Patient Type', 'Medicaid ID', 'Chart #', 'SSN', 'Email', 'Birth Date', 'Home Phone', 'Cell Phone', 'Work Phone', 'Patient ID', 'Responsible Party ID', 'Responsible Party Type', and 'Subscriber ID'.
- Search Text:** A text input field with the placeholder 'Enter Patient Last Name:' and 'Search' and 'Last Search' buttons.
- Search In:** Radio buttons for 'Current Office', 'All Offices' (selected), 'Search in Office Group', and 'Include Inactive Patients'. An 'Add New Patient' button is also present.

Below the search form, a message states: "We have found following patients matching your search criteria in all offices." Below this is a table of search results:

PatID	RPID	Chart #	Last Name	First Name	MI	NickName	Birth Date	SSN	Phone #	Email	Type	Prdr	Next Recall	Office	Medicaid ID
176	155		Howard	John			8/16/1956		(C): 906-987-4456 (H): 906-324-8597			LING		Bri	
179	156		Howard	Joyce			6/15/1982		(C): 906-312-4898 (H): 906-312-4898			LOPEZC		Bri	
183	157		Howard	Kimberly			9/20/2010		(C): (H): 906-789-7897		CH	LOPEZC		Bri	
178	156		Howard	Steven			9/15/1980		(C): 906-312-4897 (H): 906-312-4897	steven@gmail.com		LOPEZC		Bri	
175	154		Howard	William			1/20/1970		(C): 906-312-4578 (H): 906-445-2314	Willhoward@gmail.com		LING		Bri	

The table indicates "Page 1 of 2" results.

Option 2

Use the **Patient** dropdown to select **Search Patient**. Enter the patient's last name into the search field, then click **Search**.

Note: You can select specific search parameters by checking a radio button in each of the three different search fields: 'Search For', 'Search By' and 'Search In'.

Note: If there is a single patient match, you will be taken directly to the patient's home screen.

The screenshot shows the Denticon software interface. The 'Patient' dropdown menu is open, showing various options. The 'Search Patient' option is highlighted. The search field contains the text 'Howard'. The 'Search' button is highlighted. Below the search field, a table of search results is displayed. The table has columns for First Name, MI, NickName, Birth Date, SSN, Phone #, Email, Type, Prdr, Next Recall, Office, and Medicaid ID. The results show a list of patients with their respective details.

PatID	First Name	MI	NickName	Birth Date	SSN	Phone #	Email	Type	Prdr	Next Recall	Office	Medicaid ID
181	Courtney			6/15/1982		(C): 906-789-7899 (H): 906-789-7897			LOPEZC		Bri	
177	Jennifer			10/15/1960		(C): 906-987-4457 (H): 906-324-8597			LING		Bri	
182	Jeremy			8/15/2007		(C): 906-789-7897			LOPEZC		Bri	
176	John			8/16/1956		(C): 906-987-4456 (H): 906-324-8597			LING		Bri	
179	Joyce			6/15/1982		(C): 906-312-4898 (H): 906-312-4898			LOPEZC		Bri	
183	Kimberly			9/20/2010		(C): 906-789-7897		CH	LOPEZC		Bri	
178	Steven			9/15/1980		(C): 906-312-4897 (H): 906-312-4897	steven@gmail.com		LOPEZC		Bri	
175	William			1/20/1970		(C): 906-312-4578 (H): 906-445-2314	Willhoward@gmail.com		LING		Bri	

Option 3

Click the **Recent Patients** button next to the patient search box to see a list of the last five patient records viewed.

The screenshot shows the Denticon software interface. At the top, there is a navigation bar with various icons and a search bar. Below the navigation bar, there is a search section titled "Search Patient or Responsible Party". This section includes radio buttons for "Patient" and "Responsible Party", and a "Search By" section with options like "Last Name", "First Name", "NickName", "Patient Type", "Medicaid ID", "Chart #", "SSN", "Email", "Birth Date", "Home Phone", "Cell Phone", and "Work Phone". A search text field contains "Howard". To the right of the search bar, there is a "Recent Patients" dropdown menu with a list of names: Johnson, Brent; Molar, Amanda; Thomas, Bryan; Howard, William; and Danielle, Thomson. Below the search section, there is a table of search results.

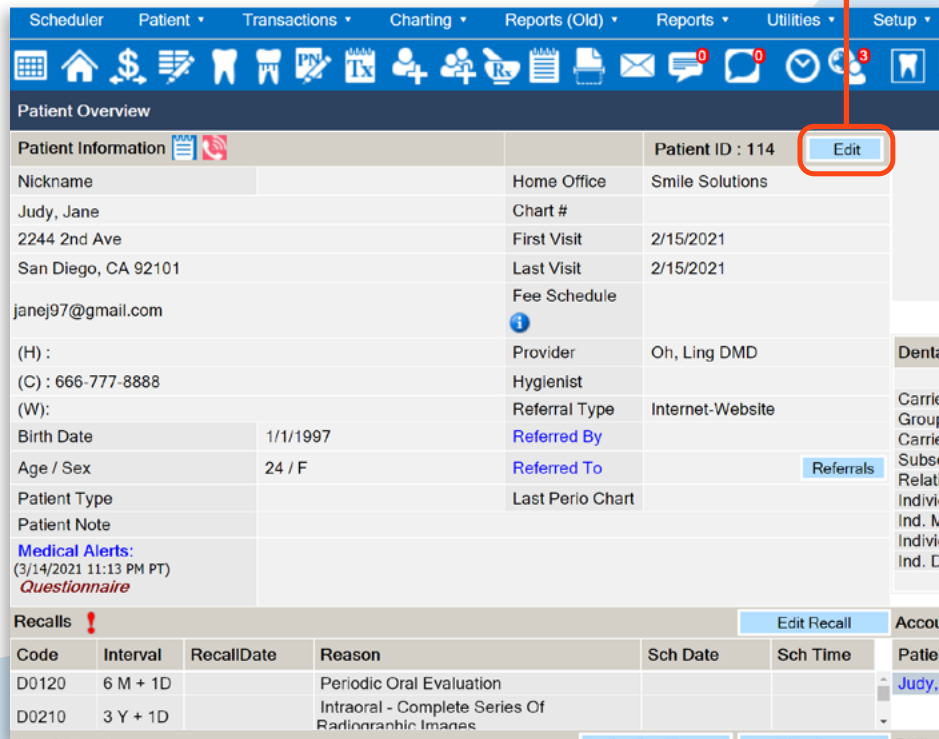
We have found following patients matching your search criteria in all offices. Page 1 of 2

PatID	RPID	Chart #	Last Name	First Name	MI	NickName	Birth Date	SSN	Phone #	Email	Type	Prdr	Next Recall	Office	Medicaid ID
180	157		Howard	Calvin			6/20/1980		(C): 906-789-7898 (H): 906-789-7897	Calvin1980@gmail.com		LOPEZC		Bri	
185	158		Howard	Carrie			6/22/1994		(C): (H): 906-321-4456			LOPEZC		Bri	
181	157		Howard	Courtney			6/15/1982		(C): 906-789-7899 (H): 906-789-7897			LOPEZC		Bri	
177	155		Howard	Jennifer			10/15/1960		(C): 906-987-4457 (H): 906-324-8597			LING		Bri	
182	157		Howard	Jeremy			8/15/2007		(C): (H): 906-789-7897 (C): 906-987-			LOPEZC		Bri	

Core Task 2: How to Edit Patient Information

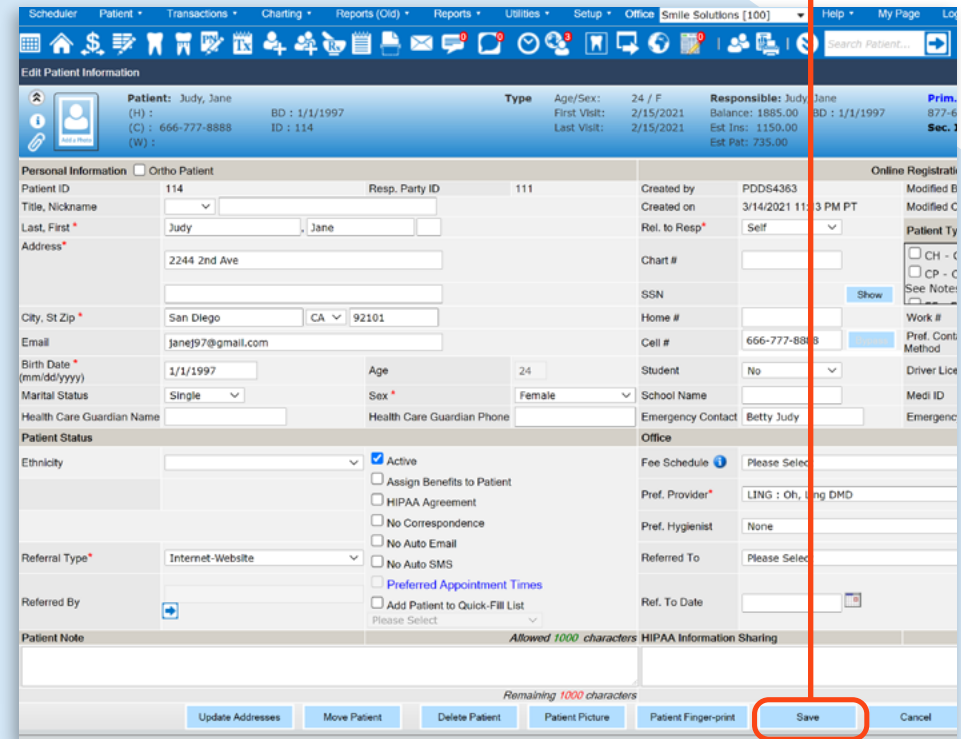
Step 1

From the 'Patient Overview' screen, click the **Edit** button in the **Patient Information** section.



Step 2

Make the required changes, then click **Save**.



Core Task 3: How to Access Patient Notes and View Attached Documents

Step 1

To view any notes or documents relating to the patient, click the **Patient Notes** icon in the toolbar.

Step 2

Any attached documents can be viewed by clicking the **Paperclip** next to the note.

The screenshot shows the Denticon software interface. At the top, there is a navigation bar with various icons and a search bar. Below this is a patient information section for Judy, Jane, including her age, sex, and insurance details. The main area displays a list of notes and documents. A red box highlights the 'Patient Notes' icon in the toolbar and the paperclip icons next to the notes in the table below.

Delete	Edit		Note Type	Notes	Created Date
Delete	Edit		Document	File Name: Elig.png [6/15/2021]	6/15/2021 - PDDS4363
Delete	Edit		System Notes	Treatment Plan was saved on 6/15/2021 4:35:49 PM PST	6/15/2021 - PDDS4363
Delete	Edit		Patient Notes	Patient has insurance through Met Life - active	6/15/2021 - PDDS4363
Delete	Edit		Document	Attachment: Driver License.pdf [6/15/2021]	6/15/2021 - PDDS4363

Core Task 4: How to View the Schedule

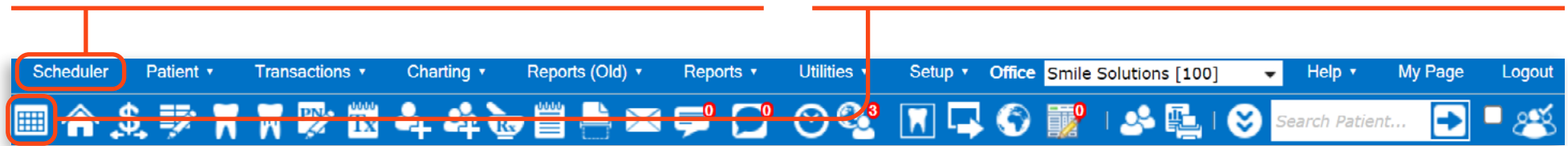
There are two ways to view the schedule to see booked appointments or to book a new appointment. Both will open the calendar.

Option 1

Click the **Scheduler** button.

Option 2

Click the **Scheduler** icon.



Timeslots can be color coded for easy identification. In this example, white slots indicate times available for bookings, gray denotes unavailable times. Purple slots are restorative.

Note: You may find that your practice has set up a different color code system. The color coding system is used by some practices to assist with booking but can be overwritten if necessary.

Core Task 5: How to Search for an Insurance Plan

There are two ways to search for an insurance plan.

Option 1

Step 1

From the 'Patient Overview' screen, click **Primary Dental** or **Secondary Dental** in the 'Dental Insurance' section.

The screenshot shows the 'Patient Overview' screen for a patient named Judy, Jane. The 'Dental Insurance' section is visible at the bottom, with two buttons labeled 'Primary' and 'Secondary' circled in red. The 'Primary' button is highlighted with a blue border, indicating it is the selected option.

Dental Insurance		View Medical Ins.
Carrier Name	MET LIFE	
Group #	2000	
Carrier Phone	877-638-3379	
Subscriber	Judy, Jane	
Relationship	Self	
Individual Max	\$2,000.00	
Ind. Max Rem.	\$850.00	
Individual Ded	\$50.00	
Ind. Ded. Rem.	\$0.00	

Step 2

Enter the **Group Number** in the 'Search Text' field, change the 'Search For' field to **Group #**, and then click **Search**.

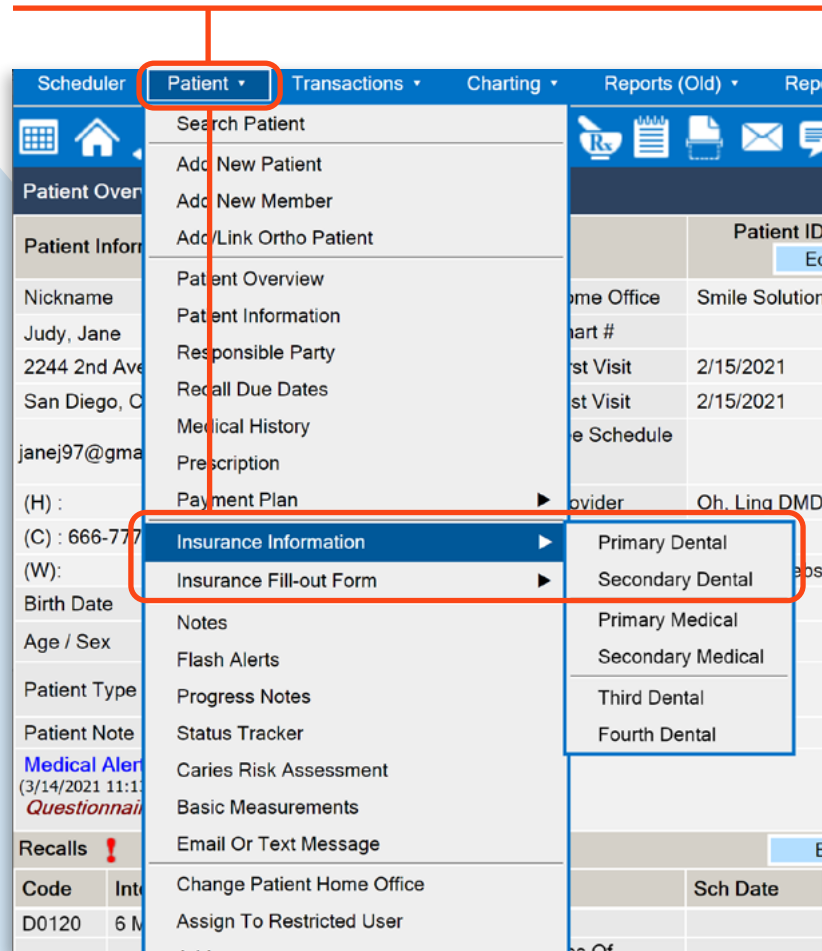
The screenshot shows the 'Add/Edit Primary Dental Plan' screen for a patient named Judy, Jane. The 'Search Insurance Plan' dialog box is open, showing the search criteria: 'Search Text' is 2000, 'Search For' is Group #, and 'Search In' is All Insurance Plans. The 'Search' button is highlighted.

Search Insurance Plan	
<input type="checkbox"/> Search by beginning with	
Search Text	2000
Search For	Group #
Search In	All Insurance Plans
<input type="button" value="Search"/>	

Option 2

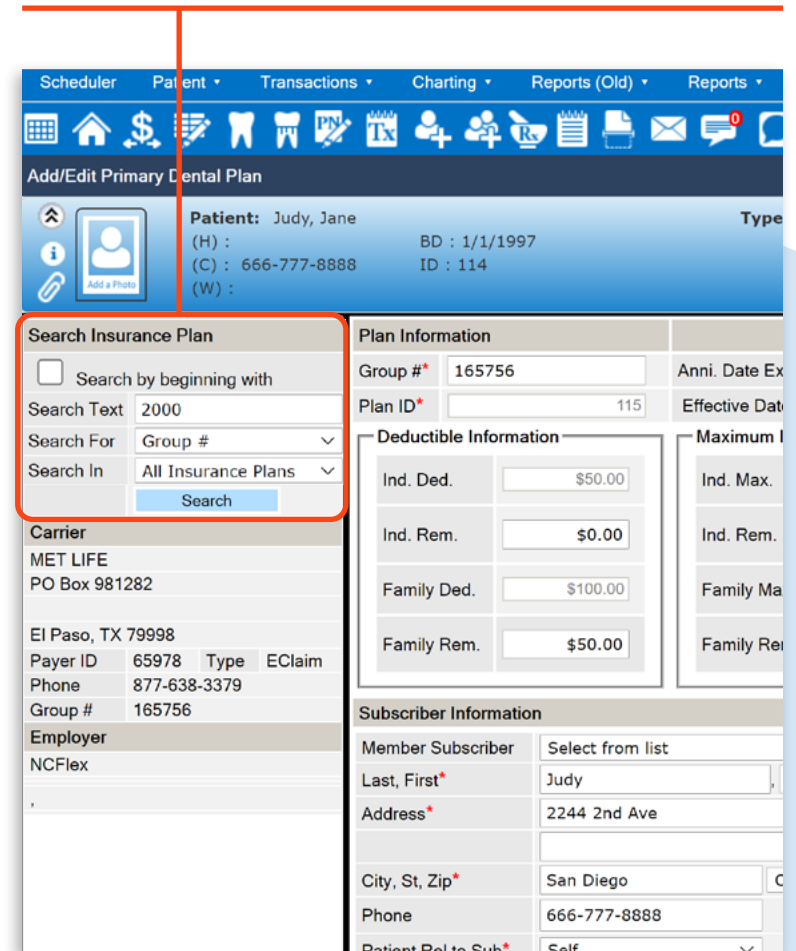
Step 1

Click the **Patient** dropdown to select **Insurance Information**, and then choose **Primary Dental or Secondary Dental**.



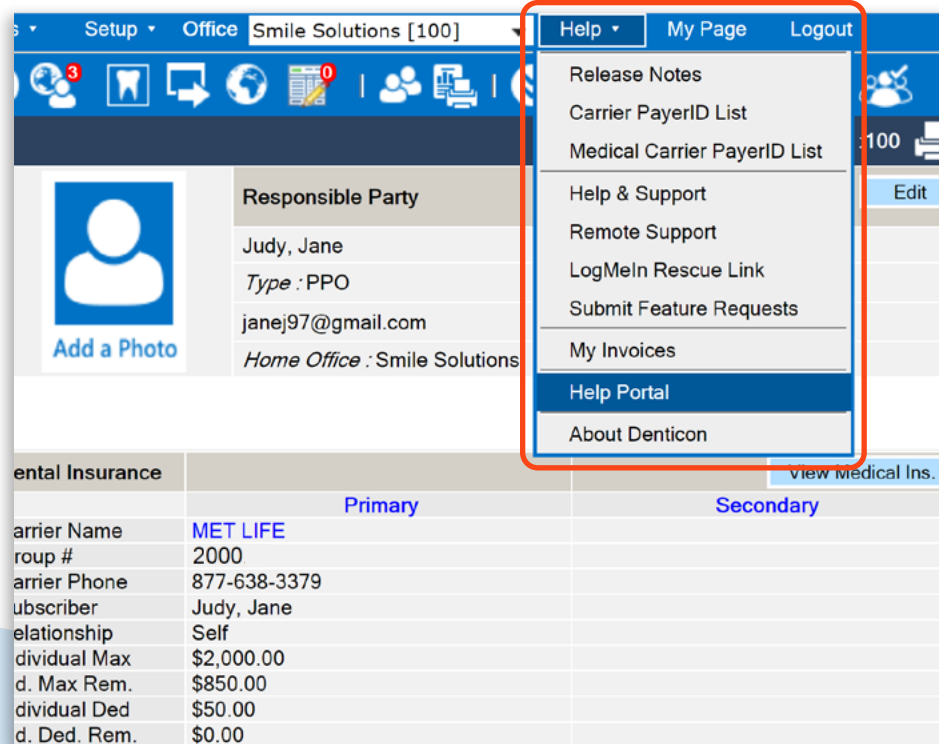
Step 2

Enter the **Group Number** in the 'Search Text' field, change the 'Search For' field to **Group #**, and then click **Search**.



Core Task 6: How to Access the Help Portal

Click the **Help** dropdown and select **Help Portal**, where a new window will open. From here, there are four options to choose from for support.

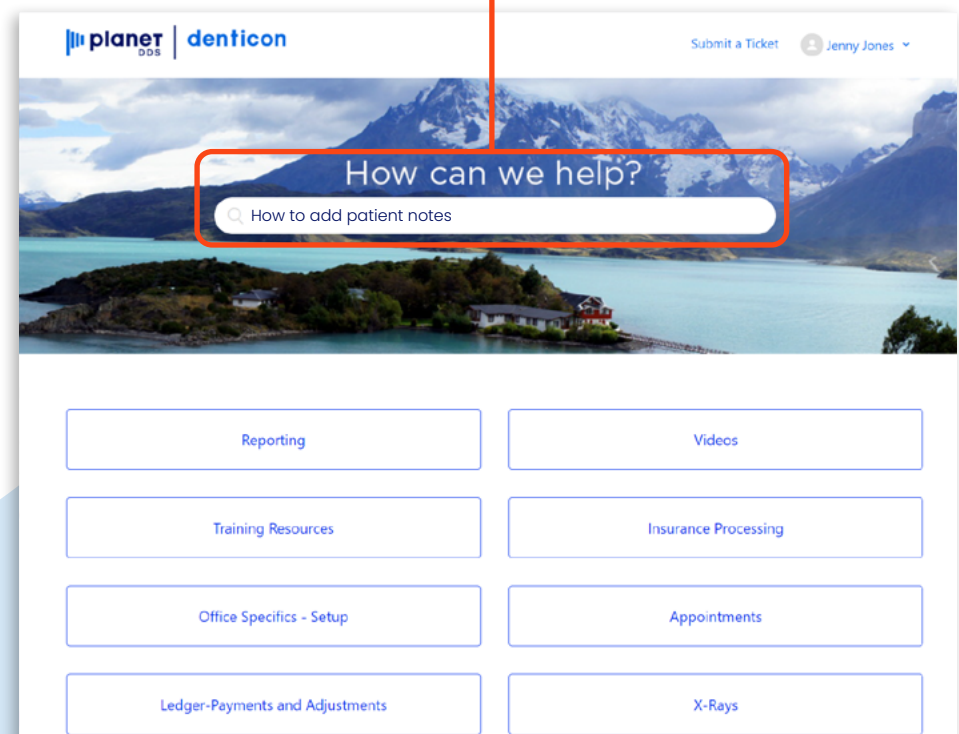


The screenshot shows the Denticon user interface. The top navigation bar includes 'Setup', 'Office', and 'Smile Solutions [100]'. A 'Help' dropdown menu is open, listing several options: Release Notes, Carrier PayerID List, Medical Carrier PayerID List, Help & Support, Remote Support, LogMeIn Rescue Link, Submit Feature Requests, My Invoices, Help Portal, and About Denticon. The 'Help Portal' option is highlighted. Below the navigation bar, there is a user profile section for 'Responsible Party' Judy, Jane, with contact information and a photo placeholder. At the bottom, there is a table for dental insurance information.

Carrier Name	Primary	Secondary
Carrier Name	MET LIFE	
Group #	2000	
Carrier Phone	877-638-3379	
Subscriber	Judy, Jane	
Relationship	Self	
Individual Max	\$2,000.00	
Ind. Max Rem.	\$850.00	
Individual Ded	\$50.00	
Ind. Ded. Rem.	\$0.00	

Option 1

Type your **Keywords or Question** into the 'Search Bar' and click **Enter** on your keyboard.



The screenshot shows the Denticon Help Portal search interface. The top navigation bar includes 'planet DDS | denticon', 'Submit a Ticket', and 'Jenny Jones'. A search bar is highlighted with the text 'How can we help?' and the search query 'How to add patient notes'. Below the search bar, there is a grid of buttons for various support topics: Reporting, Videos, Training Resources, Insurance Processing, Office Specifics - Setup, Appointments, Ledger-Payments and Adjustments, and X-Rays.

Option 2

Pick one of the **topics** directly from the menu.

Option 3

Submit a specific request or query using the **Submit a Ticket** button where you can fill in an online form.

Option 4

Scroll down to browse through recently uploaded articles in the **Recent Activity** section.

