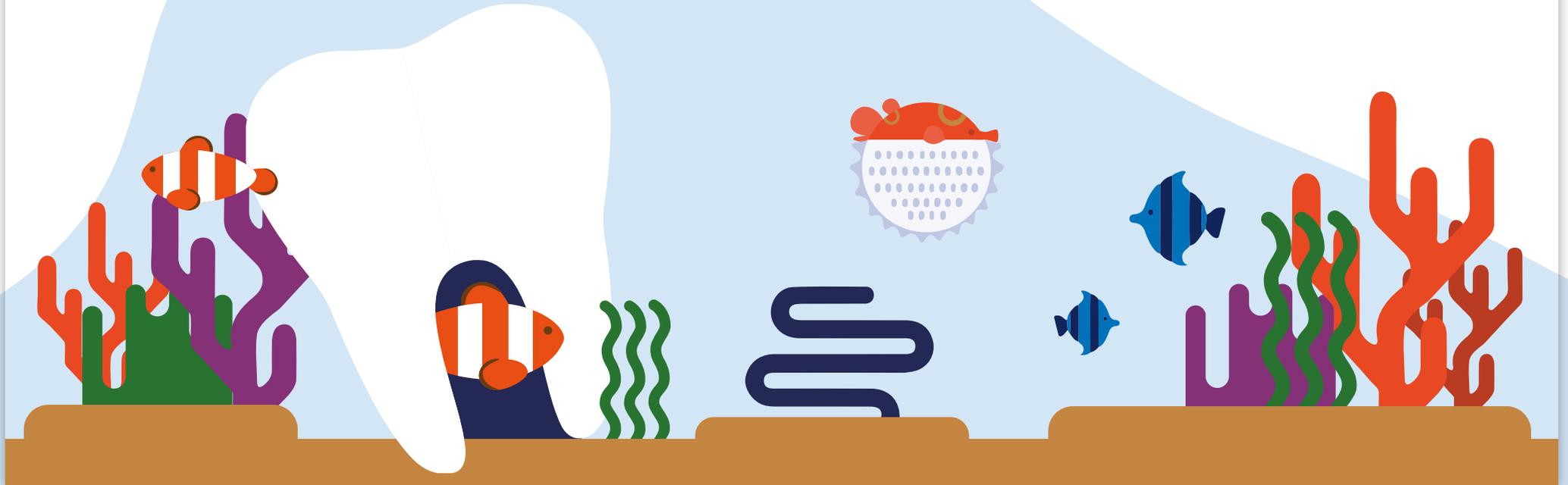denticon

PRACTICE MANAGEMENT SOFTWARE

Denticon - Basic Clerical

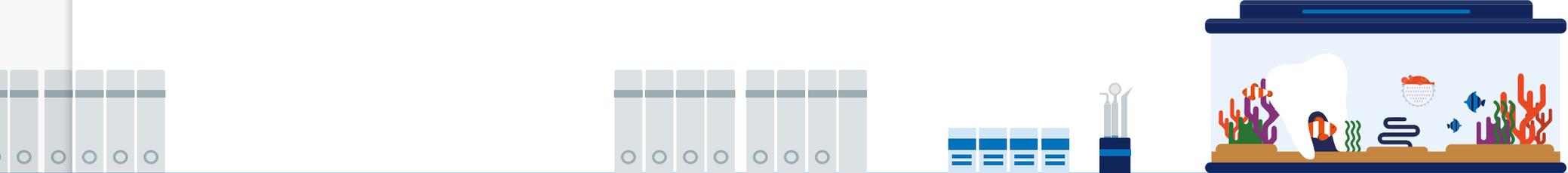# How to Add a Patient and a Dependent from an Online Registration
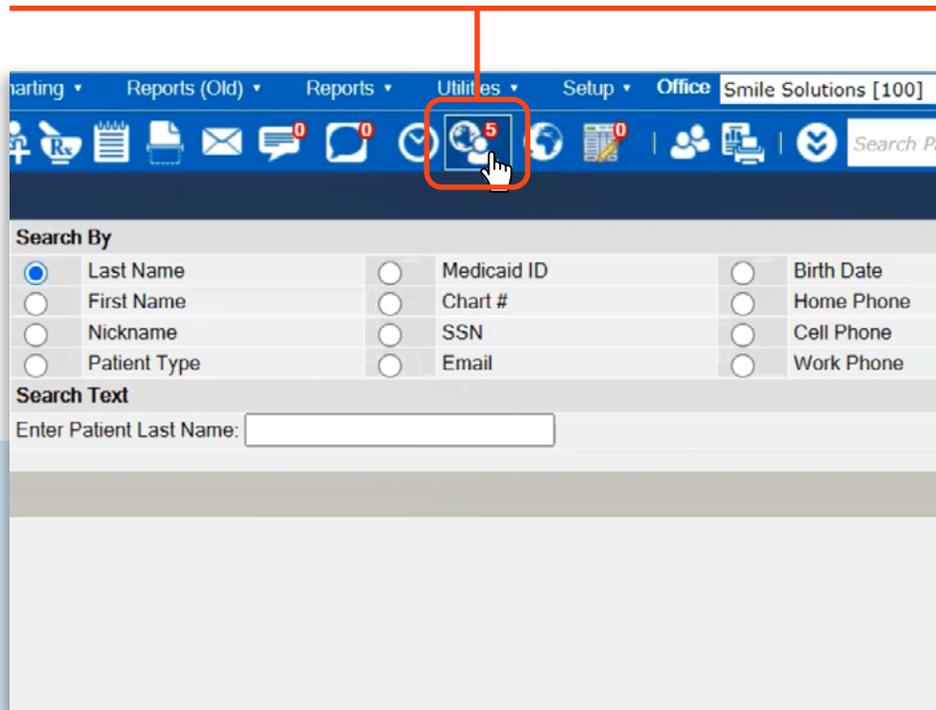
Contents

View New Online Patient Registrations

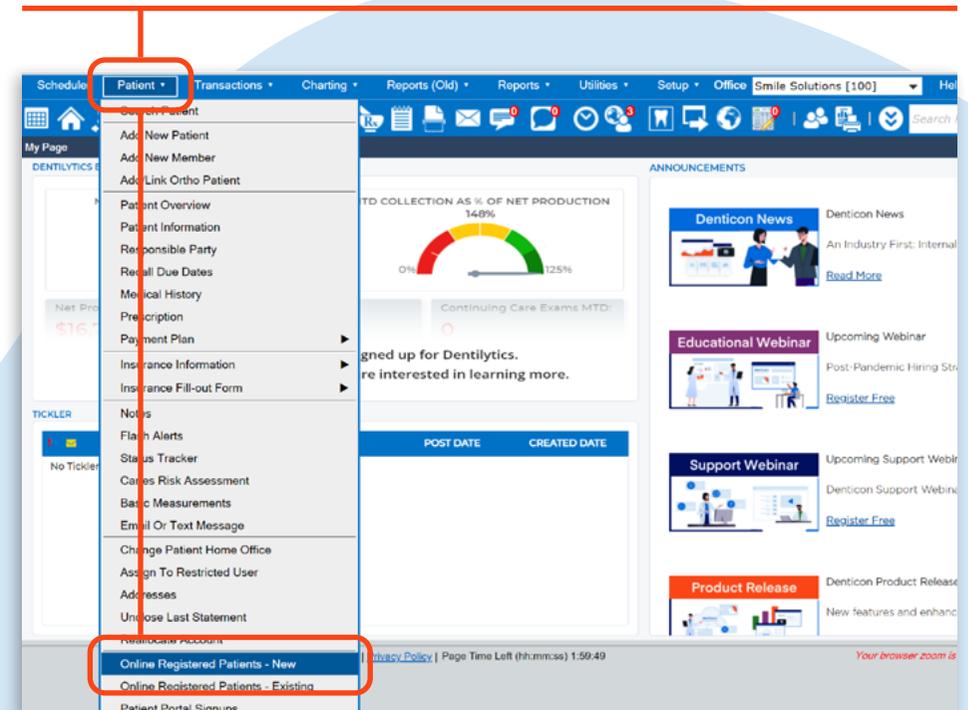There are two ways to view new online patient registrations:

Option 1

Click the **Online New Patient Registrations** icon in the toolbar.

Option 2

Click the 'Patient' tab and select **Online Registered Patients – New**.

denticon

This will open the 'Online Patients' screen, which will show a list of new patients who have completed an online registration.

Note: You can view any online registration forms by selecting a name from the list and then selecting Print Registration.

Add a New Patient from an Online Registration

Step 1

Click the **Online Registered Patients** icon in the toolbar.
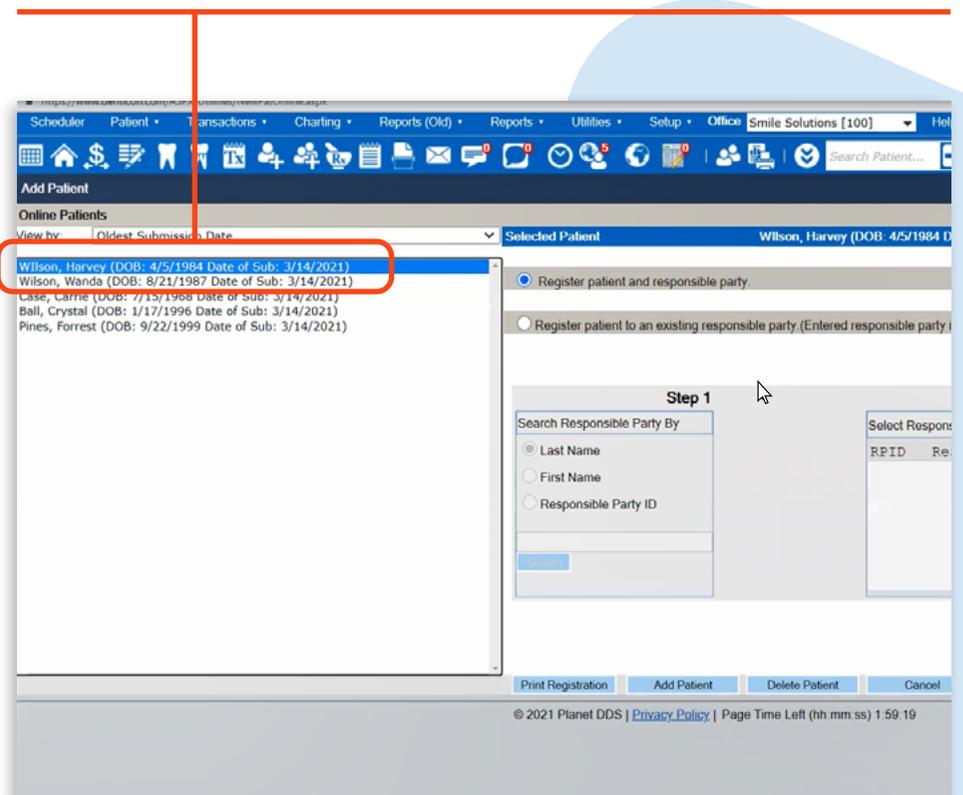

Step 2

Select the patient you wish to add from the 'Online Patients' screen.

Step 3

Click **Print Registration** to check that the patient has identified themselves as the guarantor for their account.
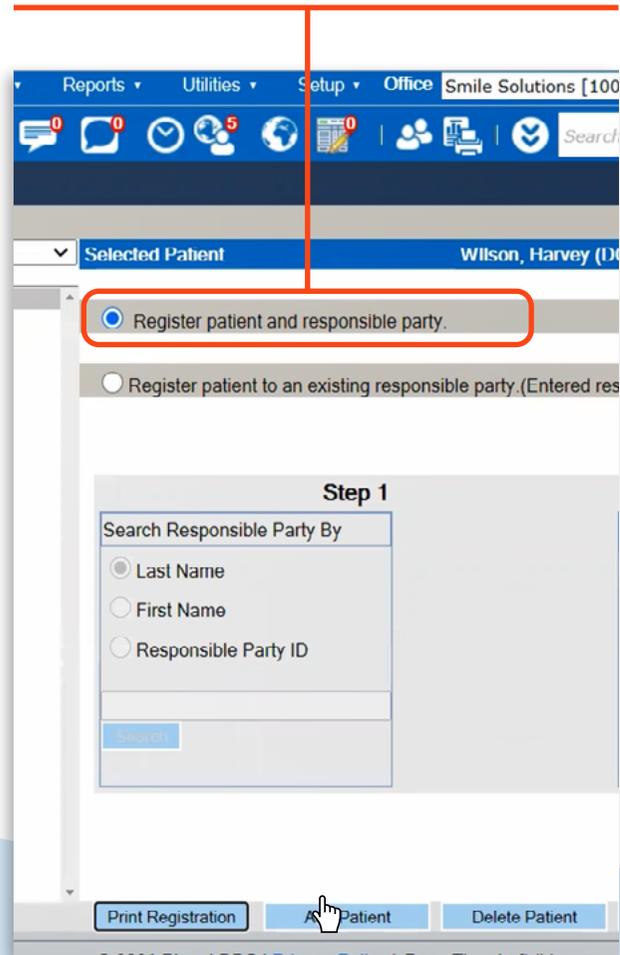
Step 4

On the 'Online Patients' screen select **Register Patient and Responsible Party**.

Step 5

Click **Add Patient** and then click **OK** in the pop-up window to confirm.
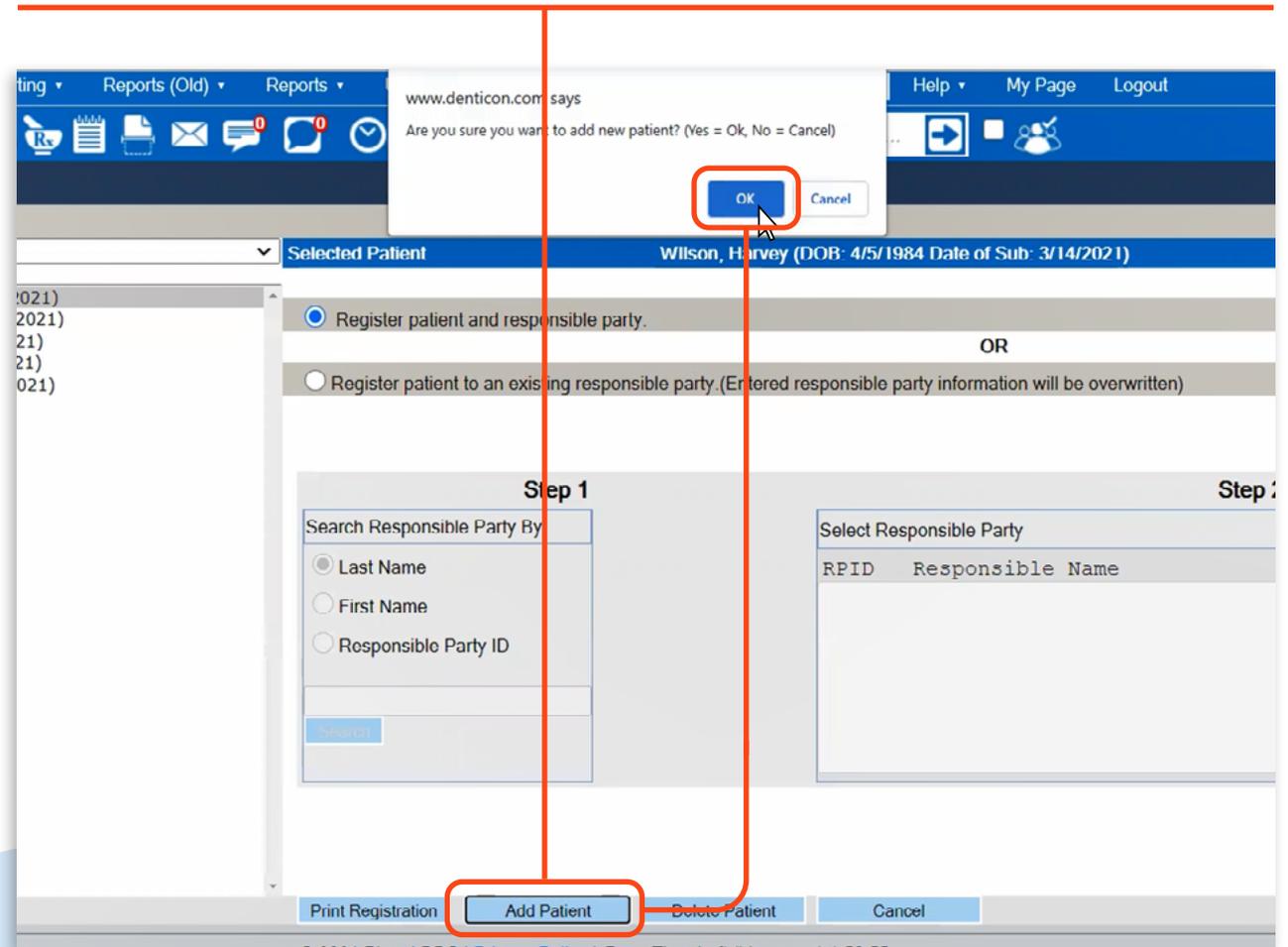
Step 6

Complete any outstanding information in the 'Add Patient Information' screen, then click **Responsible Party** to continue.

Note: Most of the fields will be pre-populated from the information provided by the patient during their online registration.

Step 7

Complete any outstanding information in the 'Responsible Party Payment/Billing Information' screen, then click **Primary Dental Insurance**.

Step 8

If the patient provided dental insurance information during their online registration, the system may be able to find a match. Choose the correct plan and then click **Select**.

Note: To verify the insurance plan, you can view it in more detail by clicking on the **hyperlinked Insurance Plan ID** in the first column of the pop-up screen.

Step 9

The insurance plan information will pre-populate on screen. If necessary, update the 'Deductible Information' or 'Maximum Information' before clicking **Add Medical Information** to continue.

Step 10

Information from Medical Alerts and Medical and Dental Questionnaires completed by the patient during their online registration will pre-populate the 'Medical Information' screen. Click **Add Recall Information** to continue.

Step 11

If known, enter the dates that the patient is due for their next appointment, then click **Finish**.

The patient has now been successfully registered.

The Patient Overview screen will show all their details.

Note: Online Patient Registration forms are automatically saved to the Patient Notes area in Denticon.

Add a Dependent from Online New Patient Registrations

Step 1

Click the **Online New Registered Patients** icon in the toolbar.
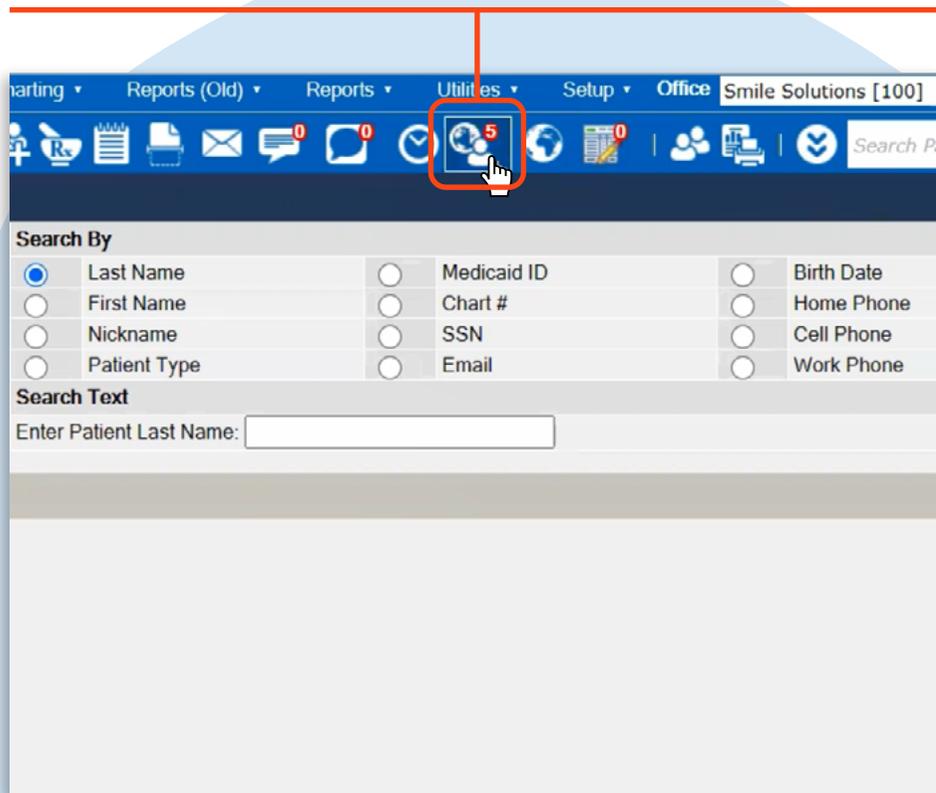
Step 2

Select the new patient you wish to add from the 'Online Patients' screen.
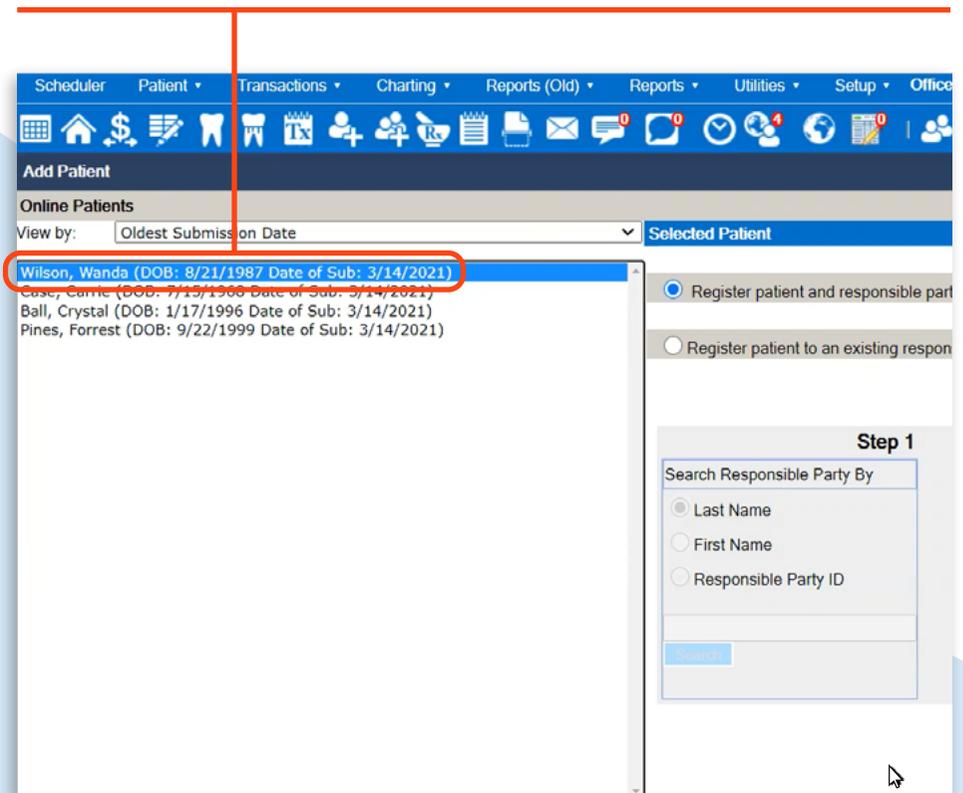
Step 3

Click **Print Registration** to check who the patient has identified as the guarantor (responsible party) for their account.

Step 4

On the 'Online Patients' screen, select **Register patient to an existing responsible party**.

Step 5

In the 'Search Responsible Party By' field, enter the last name, first name, or responsible party ID into the text entry field, then click **Search**.
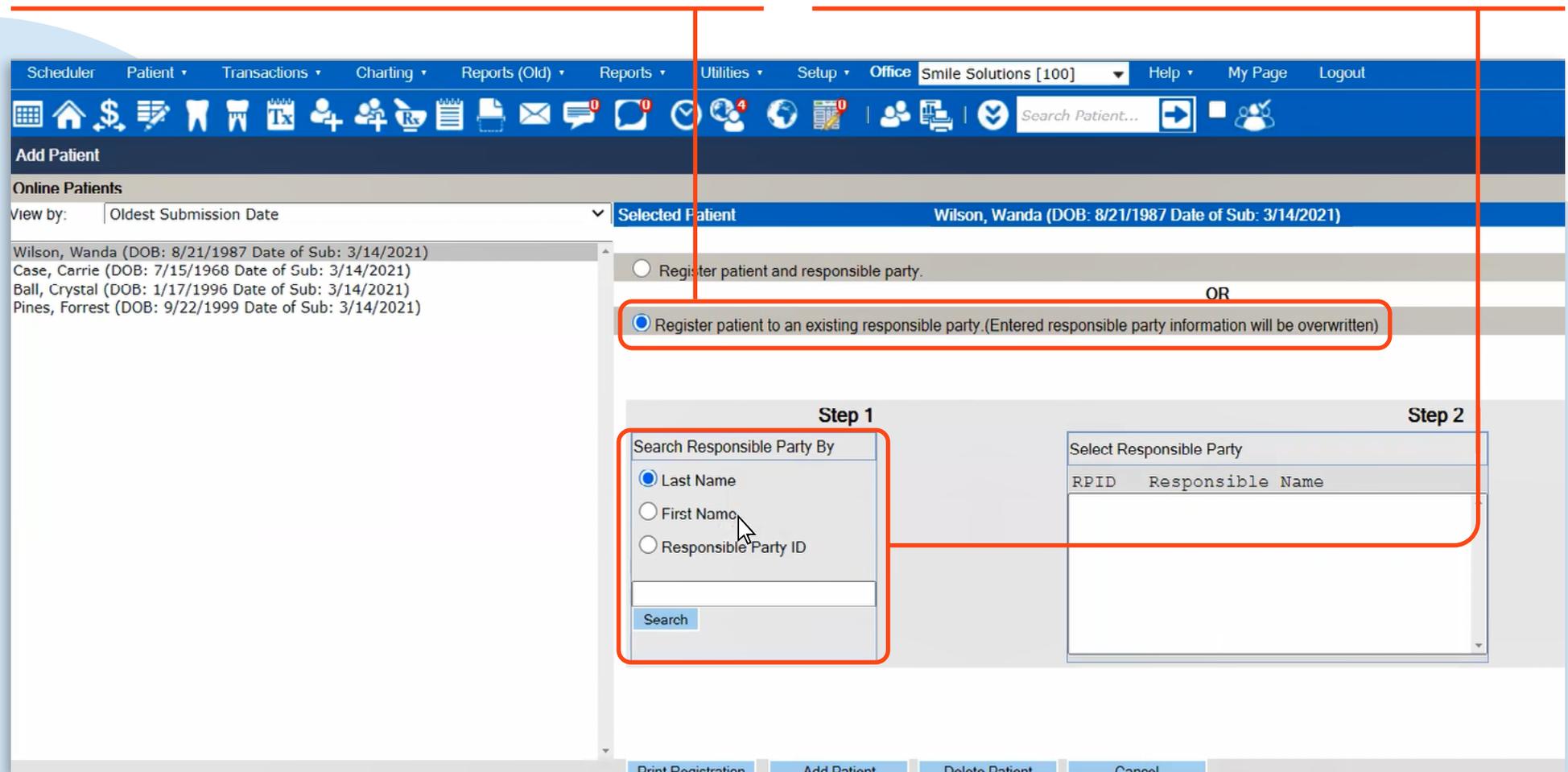
Step 6

Under 'Select Responsible Party' select the relevant account for the dependent to be linked with.
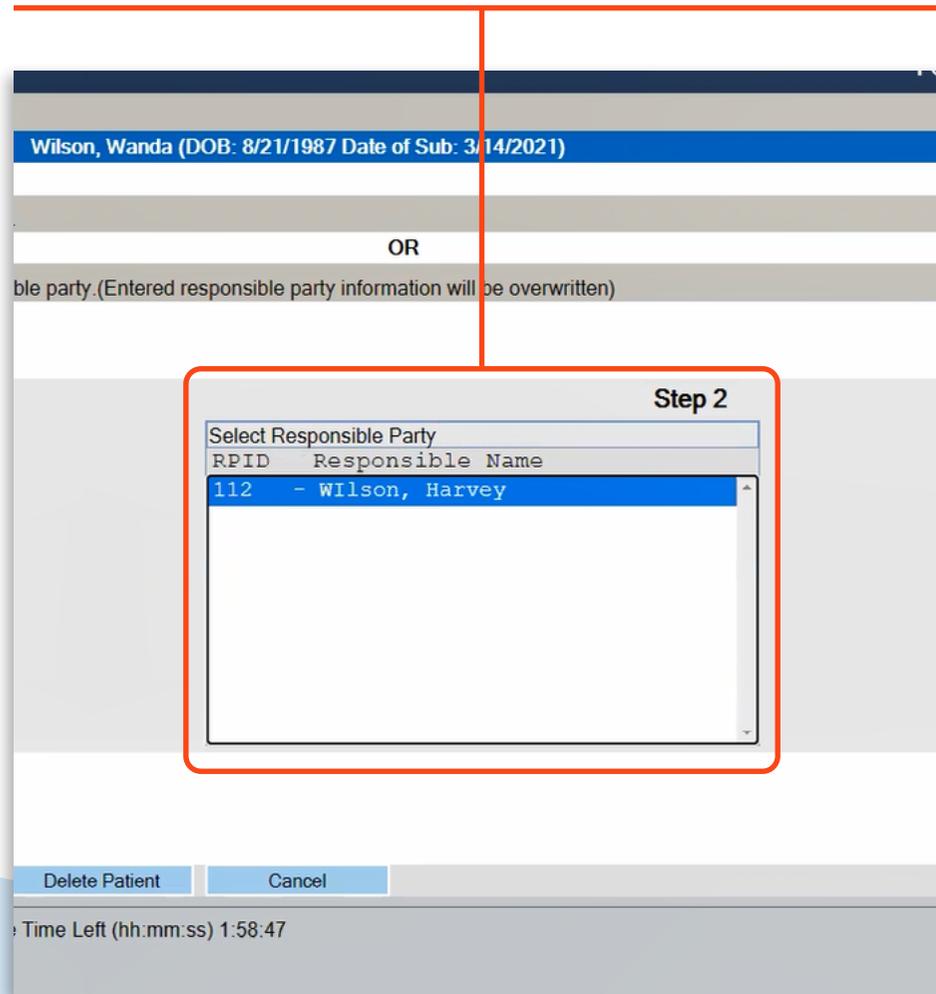
Step 7

Click **Add Patient** and then click **OK** in the pop-up window to confirm.
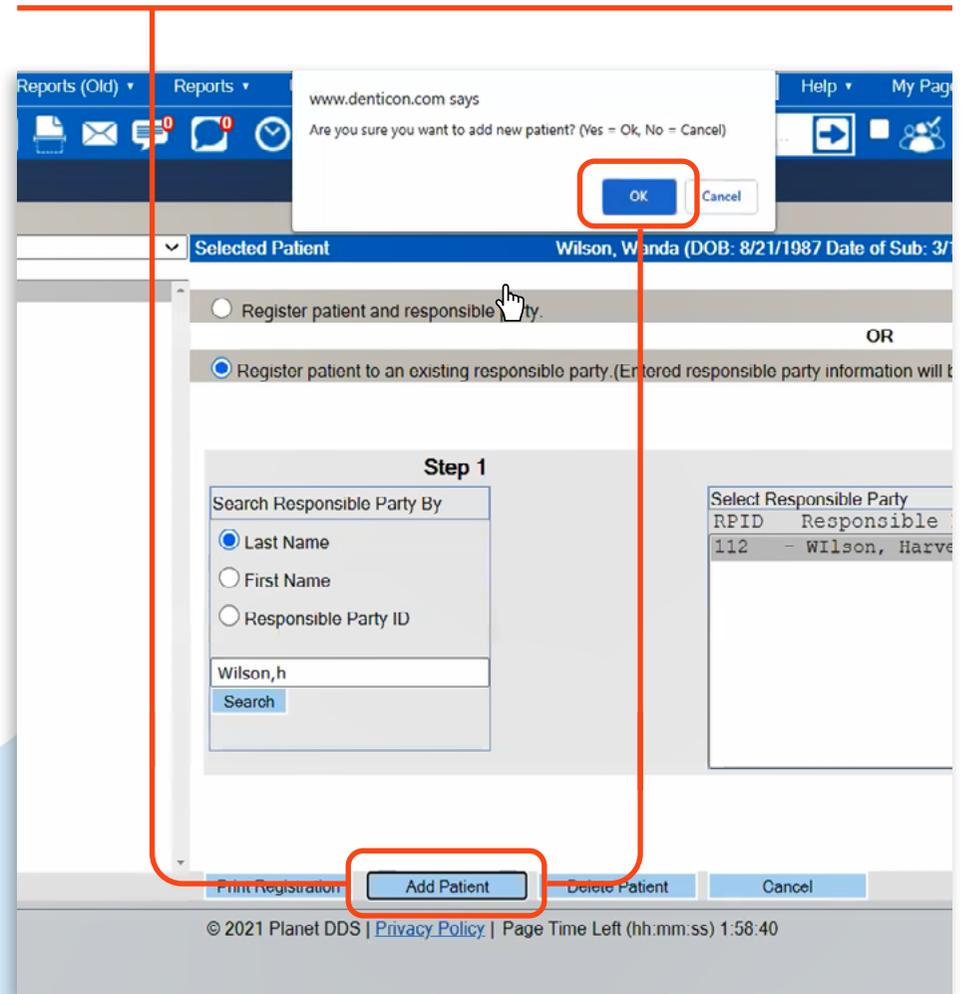
Step 8

Complete any outstanding information in the 'Add Patient Information' screen, then click **Primary Dental Insurance** to continue.

> **Note:** Denticon anticipates the dependent will have the same preferred provider as the responsible party, however this can be changed if necessary.

Step 9

Close the dental insurance pop-up window, and under the 'Search Insurance Plan' section, select **Account Plans** from the 'Search In' field to find any insurance plans already associated with the dependent's account, then click **Search**.

Step 10

Click the plan that is relevant to the patient, then click **Select**.
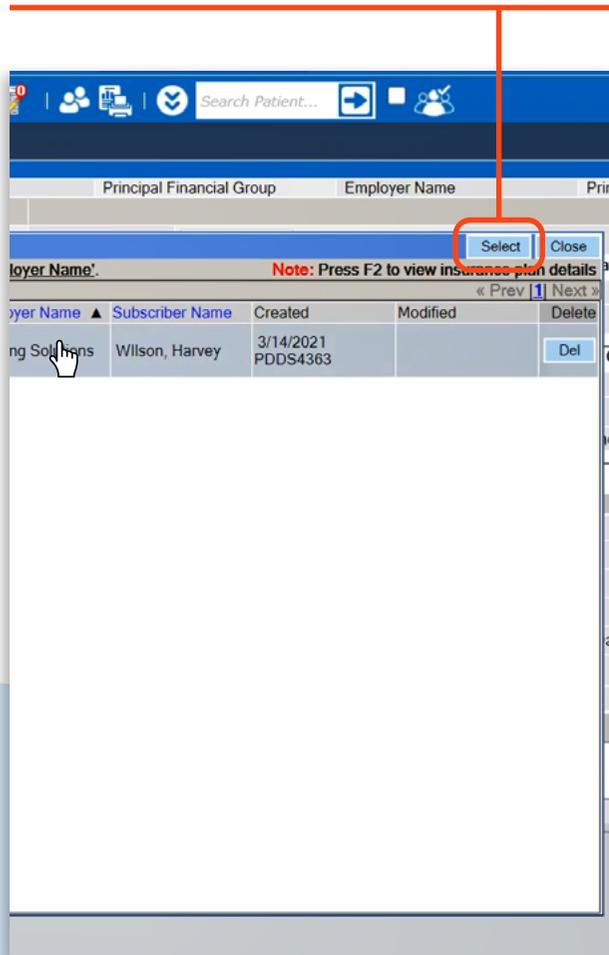
Step 11

In the 'Subscriber Information' section, use the 'Patient Relation to Subscriber' dropdown to ensure the correct option is selected for the dependent, then click **Add Medical Information**.
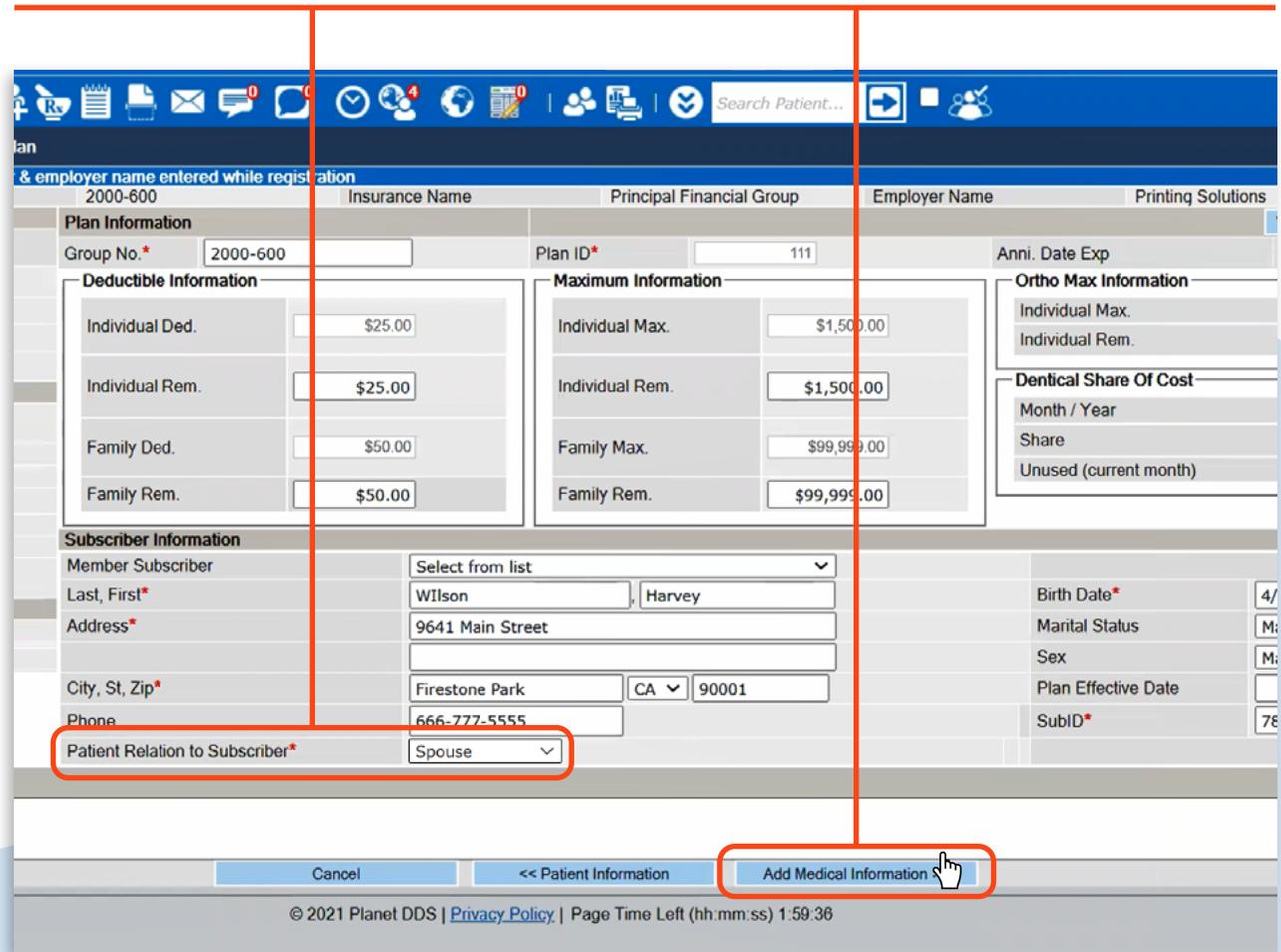
Step 12

During their online registration, the patient would have completed Medical Alerts and Medical and Dental Questionnaires, which will pre-populate the 'Medical Information' screen. Click **Add Recall Information** to continue.

Step 13

Update the patient's recall Information, then click **Finish**.

Scheduler   Patient ▾   Transactions ▾   Charting ▾   Reports (Old) ▾   Reports ▾   Utilities ▾   Setup ▾   **Office** Smile

Patient Overview

Patient Information 📋🚫   **Patient ID : 116**   [Edit]

Nickname		Home Office	Smile Solutions
Wilson, Wanda		Chart #	
9641 Main Street		First Visit	
Firestone Park, CA 90001		Last Visit	
		Fee Schedule ⓘ	**Dental**
(H) : 666-777-5555		Provider	Lopez, Carlos DDS
(C) : 666-777-5557		Hygienist	Carrier
(W):		Referral Type	Internet-Website
Birth Date	8/21/1987	Referred By	Group
Age / Sex	33 / F	Referred To	Carrier
Patient Type		Last Perio Chart	Subsc
Patient Note			Relatic
			Individ
Medical Alerts:	Aspirin		Ind. Ma
(3/14/2021 11:38 PM PT)			Individ
Questionnaire			Ind. De

Recalls ❗   [Edit Recall]   **Accou**

Code	Interval	RecallDate	Reason	Sch Date	Sch Time	Patien
D0120	6 M + 1D		Periodic Oral Evaluation			Wilson
D0210	3 Y + 1D		Intraoral - Complete Series Of Radiographic Images			Wilson

Appointments   [Archived Appt] [New Appt]   **Billing**

Date	Time	Office	Operatory	Status	Prdr	Len	User	
No records to display.								Accoun
								Wilson
								Wilson
								Est. In

Regular Payment Plan Agreement   [Detail] [View Ortho Plan]   Last In

			Last P
Amount Fin.	Next Per Amt	Rem. Total Amt	Last P
Amt Down	Next Date	Rem. # Of Pay	Last St

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The dependent has now been successfully registered.

The Patient Overview screen will show all their details.