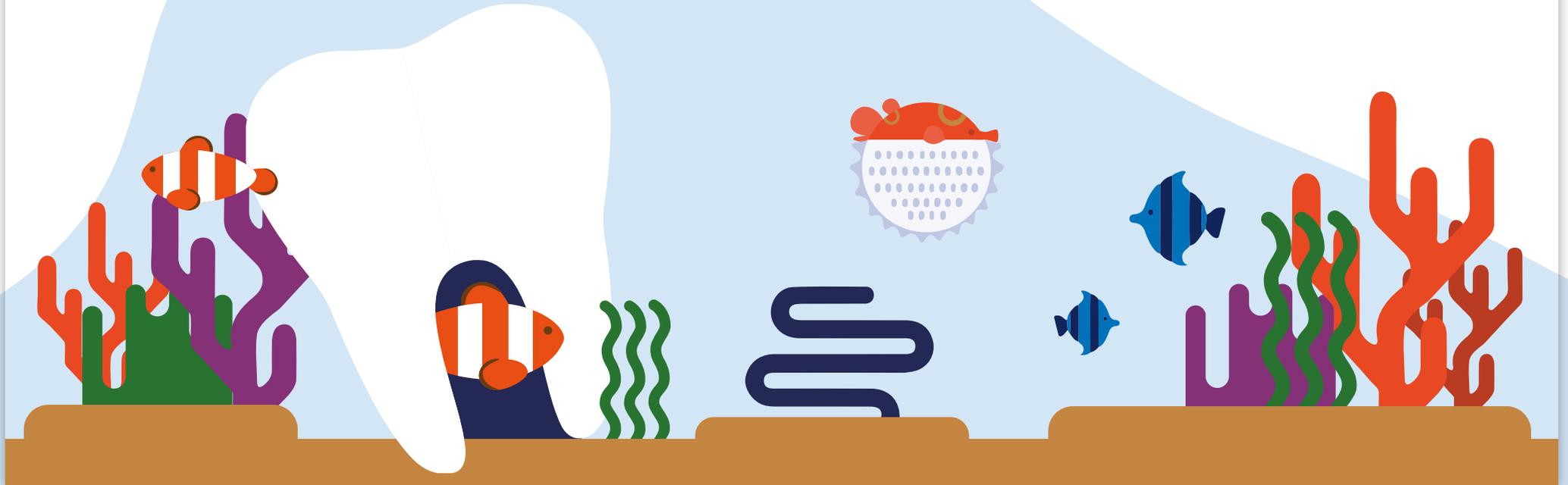




Denticon – Basic Clerical

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

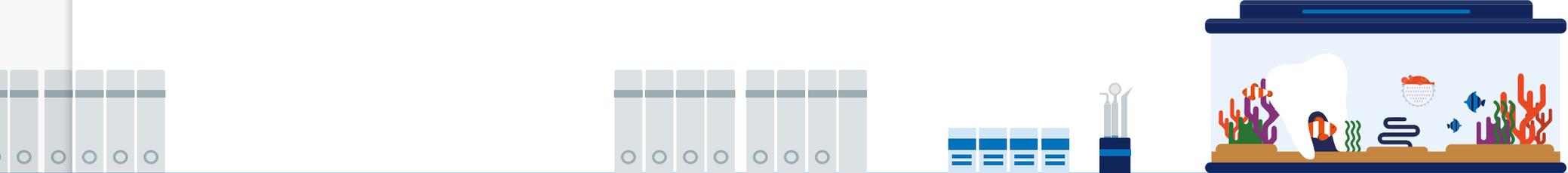


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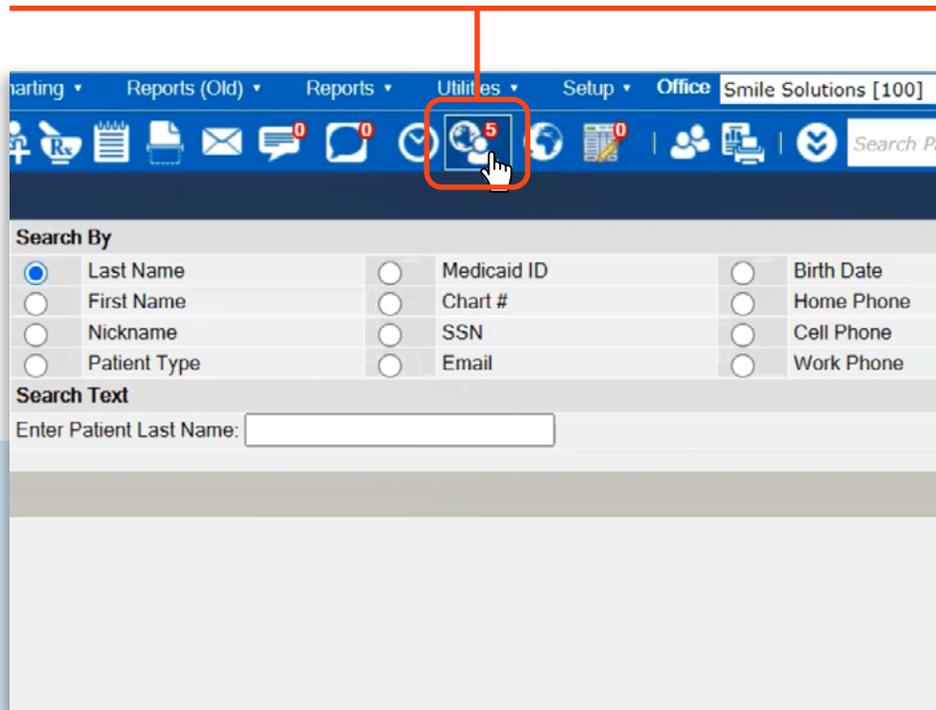


View New Online Patient Registrations

There are two ways to view new online patient registrations:

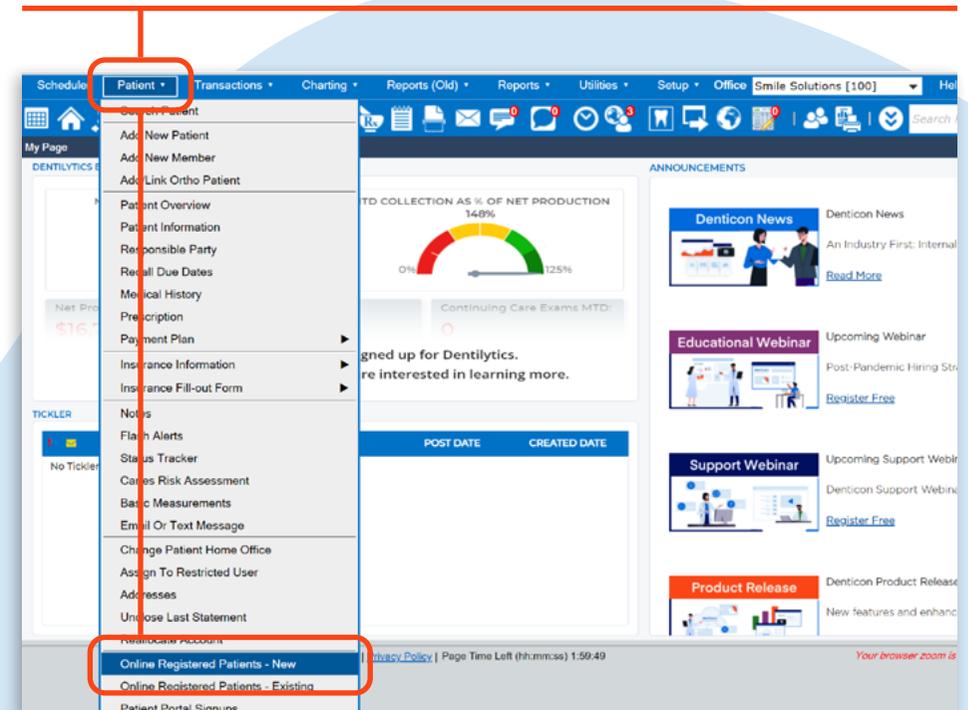
Option 1

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



Option 2

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



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.

Scheduler Patient Transactions Charting Reports (Old) Reports Utilities Setup Office Smile Solutions [100] Help My Page Logout

PGID .4363 / OID .100

Add Patient

Online Patients

View by: Oldest Submission Date Selected Patient Wilson, Harvey (DOB: 4/5/1984 Date of Sub: 3/14/2021)

Wilson, Harvey (DOB: 4/5/1984 Date of Sub: 3/14/2021)
Wilson, Wanda (DOB: 8/21/1987 Date of Sub: 3/14/2021)
Case, Carrie (DOB: 7/15/1968 Date of Sub: 3/14/2021)
Ball, Crystal (DOB: 1/17/1996 Date of Sub: 3/14/2021)
Pines, Forrest (DOB: 9/22/1999 Date of Sub: 3/14/2021)

Register patient and responsible party.
OR
 Register patient to an existing responsible party. (Entered responsible party information will be overwritten)

Step 1 Search Responsible Party By
 Last Name
 First Name
 Responsible Party ID
Search

Step 2 Select Responsible Party
RPID Responsible Name

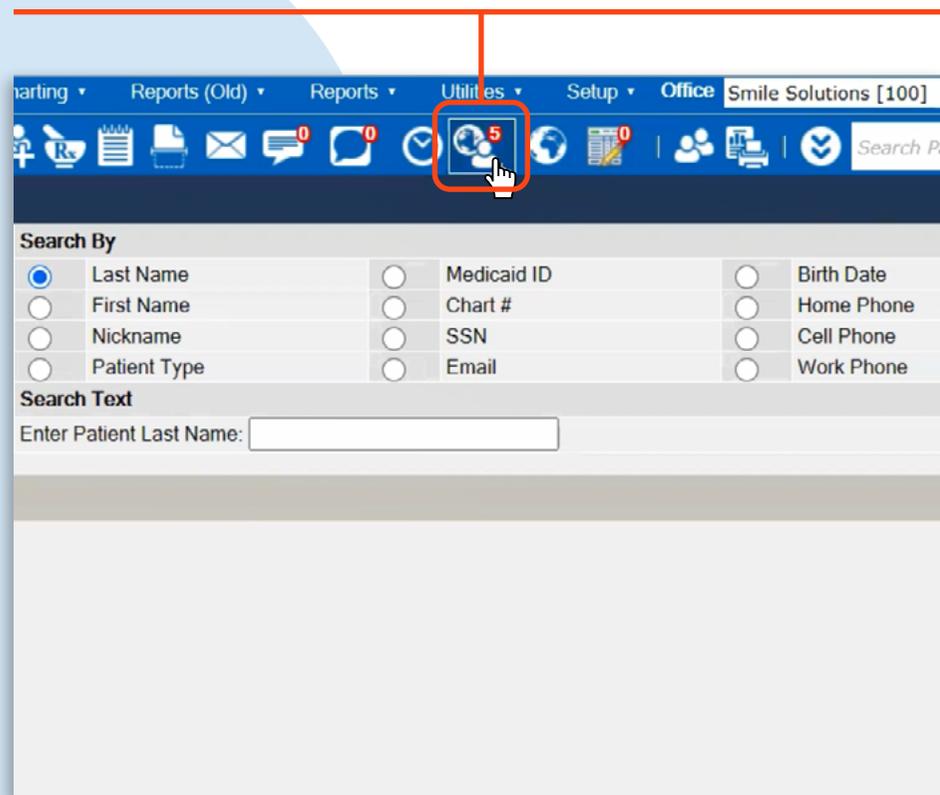
Print Registration Add Patient Delete Patient Cancel

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Add a New Patient from an Online Registration

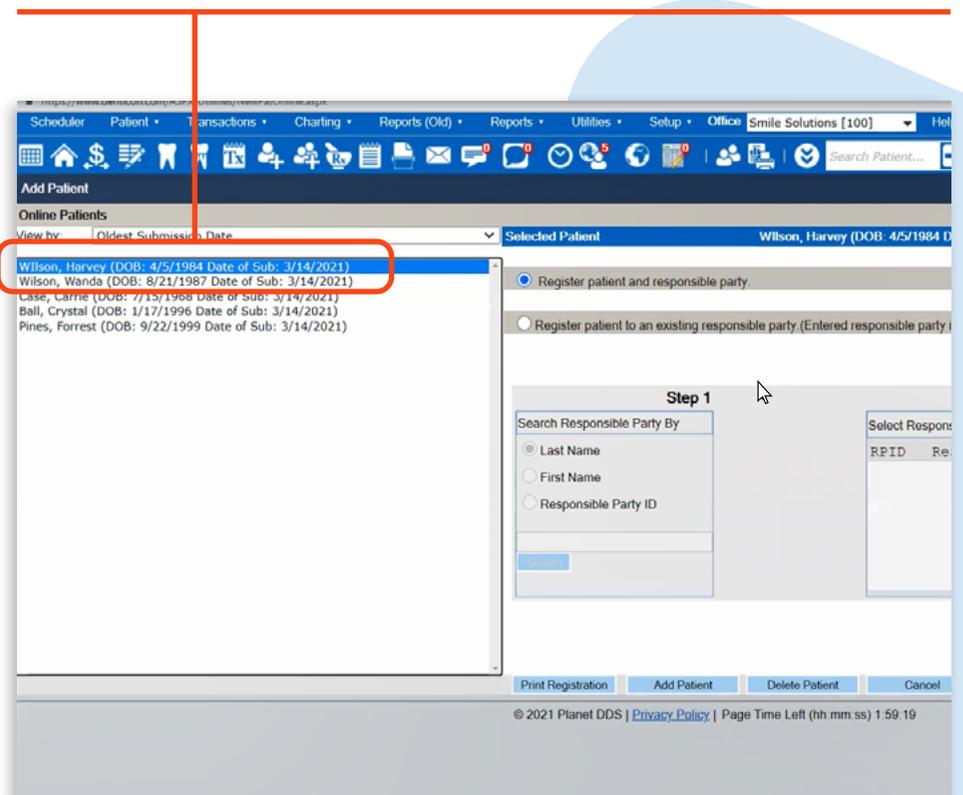
Step 1

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.

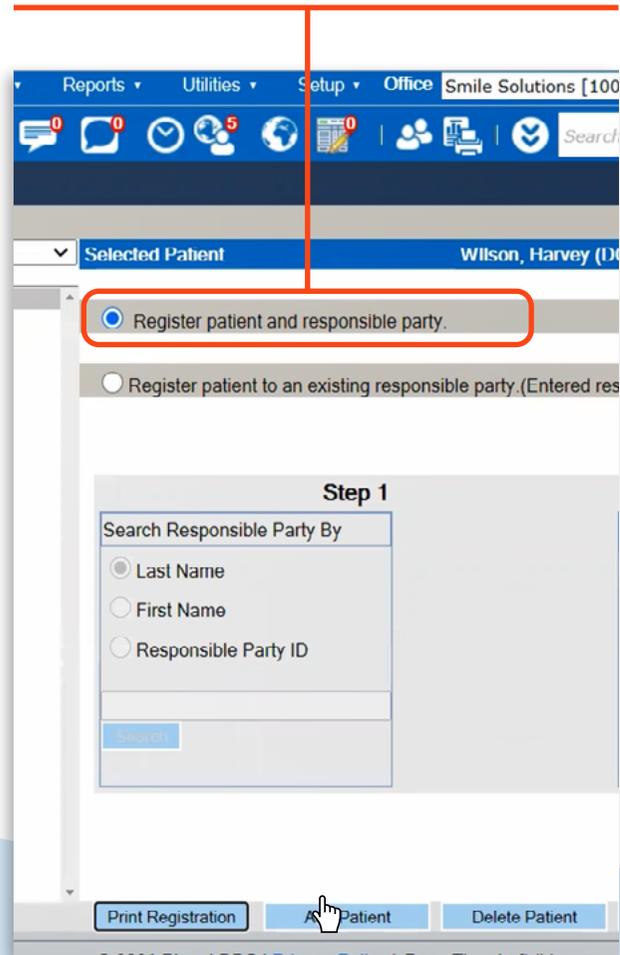
The screenshot displays the Planet Denticon software interface. At the top, there is a navigation bar with menus for Charting, Reports, Utilities, Setup, and Office. The current office is identified as 'Smile Solutions [100]'. Below the navigation bar, a toolbar contains various icons for patient management. A dropdown menu shows 'Selected Patient: Wilson, Harvey (DOB: 4/5/1984)'. The main area is titled 'Step 1' and contains two radio button options: 'Register patient and responsible party.' (selected) and 'Register patient to an existing responsible party. (Entered responsible party ID)'. Below these options is a 'Search Responsible Party By' section with radio buttons for 'Last Name', 'First Name', and 'Responsible Party ID'. A 'Print Registration' button is highlighted with a red box at the bottom of the form. To the right, a detailed patient information form is shown, with a red box highlighting the 'PERSON RESPONSIBLE/GUARANTOR FOR PAYING BILLS' section. This section contains the following information:

PERSON RESPONSIBLE/GUARANTOR FOR PAYING BILLS	
Title	Nickname
Last, First	Wilson, Harvey
Address	9641 Main Street
City, State, Zip	Firestone Park CA 90001
Email	

The rest of the patient information form includes fields for Birth Date (04/05/1984), Age (36), Marital Status (Married), Sex (Male), Home # (6667775555), Work # (4612), Cell # (6667775556), Drive Lic, Emergency Contact (Jeffrey Wilson - Father), Emergency Phone # (999), Student (No), SSN, Referral Type (Internet-Website), and Referred By (God).

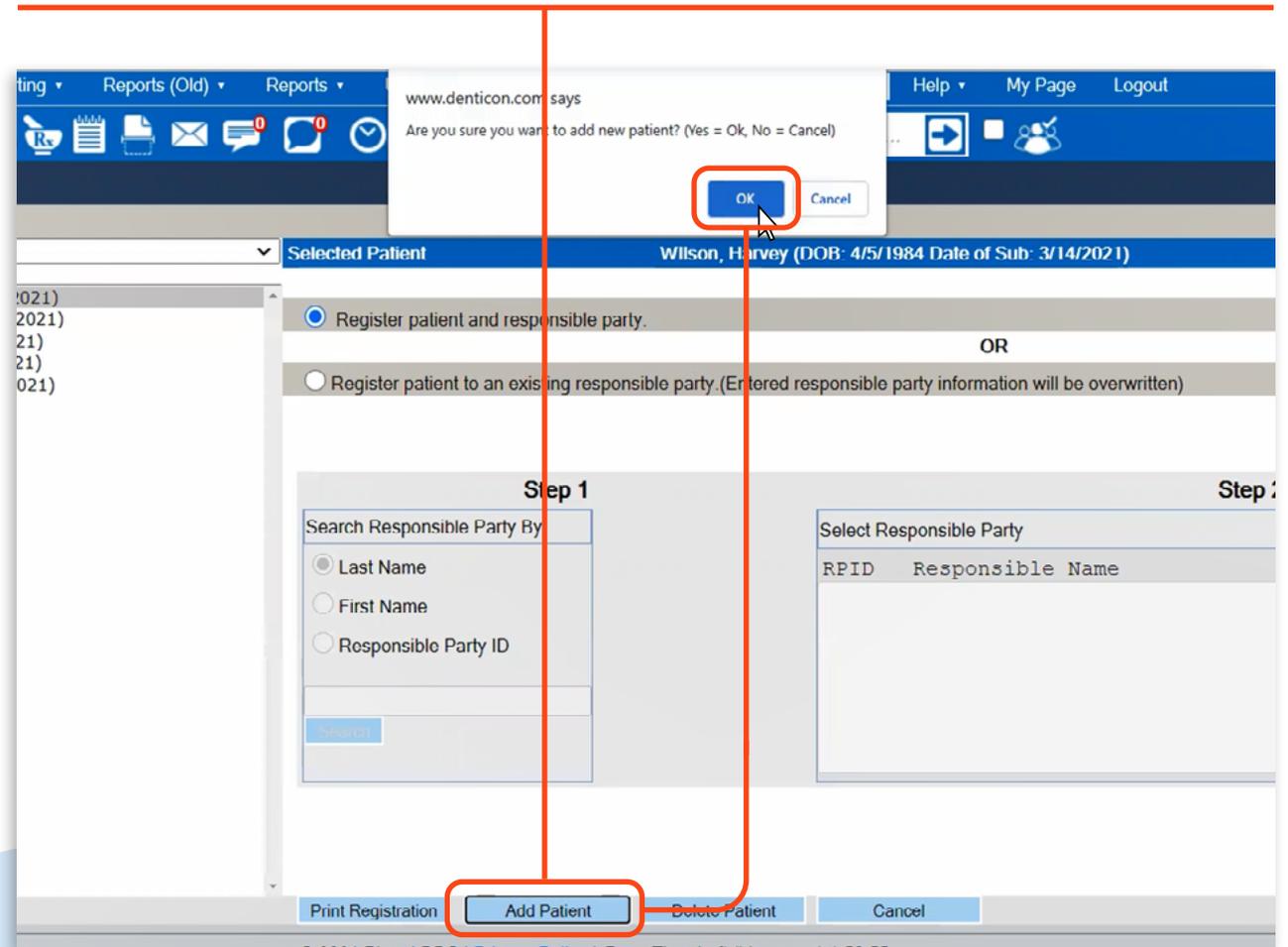
Step 4

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 1: Add Patient Information

Personal Information Ortho Patient

Birth Date* (mm/dd/yyyy) 4/5/1984 36 Last, First* Wilson, Harvey

Additional Details

Title, Nickname [] [] [Check Patient](#)

Address* 9641 Main Street

City, St Zip* Firestone Park CA 90001

Email []

Marital Status Married Sex* Male

Health Care Guardian Name [] Health Care Guardian Phone []

Patient Status

Active

Assign Benefits to Patient

HIPAA Agreement

No Correspondence

No Auto Email

No Auto SMS

Add Patient to Quick-Fill List

Coverage Type*

No Coverage

Primary Dental

Secondary Dental

Primary Medical

Secondary Medical

My Preferred Appointment Times [Edit](#)

Starting Balances

Current Over 30 Over 60 Over 90 Over 120

[Responsible Party >>](#) [Cancel](#)

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Step 7

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

(Old) Reports Utilities Setup Office Smile Solutions [100] Help My Page Login

[Search Patient...](#)

Responsible Party

Send Statements

No Email Statement

Send to Collection

Apply Finance Charge

Home # 666-777-5555

Cell # 666-777-5556

Responsible for following Patients

PatientName	Age	Sex
Wilson, Harvey	36	M

[Insert Date Stamp](#) [Responsible Party Notes](#)

[Cancel](#) [<< Patient Information](#) [Primary Dental Insurance >>](#)

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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.

The screenshot shows a pop-up window titled 'Please select a plan.' with the message: 'We have found following plans for your search 'Printing Solutions' on 'Employer Name'.' A table lists the following plan:

Plan ID	Group No	Carrier ID	Carrier Name	Employer Name	Created	Modified
111	2000-600	1114	PRINCIPAL FINANCIAL GROUP/LIF	Printing Solutions	3/14/2021 PDDS4363	3/14/2021 PDDS4363

The 'Select' button is highlighted in the top right corner of the pop-up.

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.

The screenshot shows the patient registration form with the following pre-populated information:

- Insurance Name: Principal Financial
- Employer Name: Printing Solutions
- Plan ID*: 111
- Maximum Information:
 - Individual Max: \$1,500.00
 - Individual Rem: \$1,500.00
 - Family Max: \$99,999.00
 - Family Rem: \$99,999.00

The 'Add Medical Information >>' button is highlighted in the bottom right corner.

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.

Medical Alerts
Dental Questionnaire
Medical Questionnaire

Jeffrey Wilson
9995551111
Father

Dr. Lee
777-777-7777
No
No

Cancel << Primary Dental Insurance **Add Recall Information >>** No to all med alerts

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Step 11

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

Schedule Appt First Visit

Recall Due Date	Sched. Dt

Primary Dental Insurance **Finish**

Page Time Left (hh:mm:ss) 1:59:59

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

Patient Overview

Patient Information

Patient ID : 115 [Edit](#)

Nickname	Home Office	Smile Solutions
Wilson, Harvey	Chart #	
9641 Main Street	First Visit	
Firestone Park, CA 90001	Last Visit	
	Fee Schedule	
(H) : 666-777-5555	Provider	Lopez, Carlos DDS
(C) : 666-777-5556	Hygienist	
(W) : 461-274-5219	Referral Type	Internet-Website
Birth Date	4/5/1984	Referred By
Age / Sex	36 / M	Referred To
Patient Type		Last Perio Chart
Patient Note		
Medical Alerts* : (3/14/2021 11:34 PM PT) Questionnaire	Bronchitis, Hay Fever	
	<i>Additional Comments:</i> Taking Over the Counter Hay Fever Medications.	

Recalls [Edit Recall](#)

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

Appointments [Archived Appt](#) [New Appt](#)

Date	Time	Office	Operatory	Status	Prdr	Len	User
No records to display.							

Regular Payment Plan Agreement [Detail](#) [View Ortho Plan](#)

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

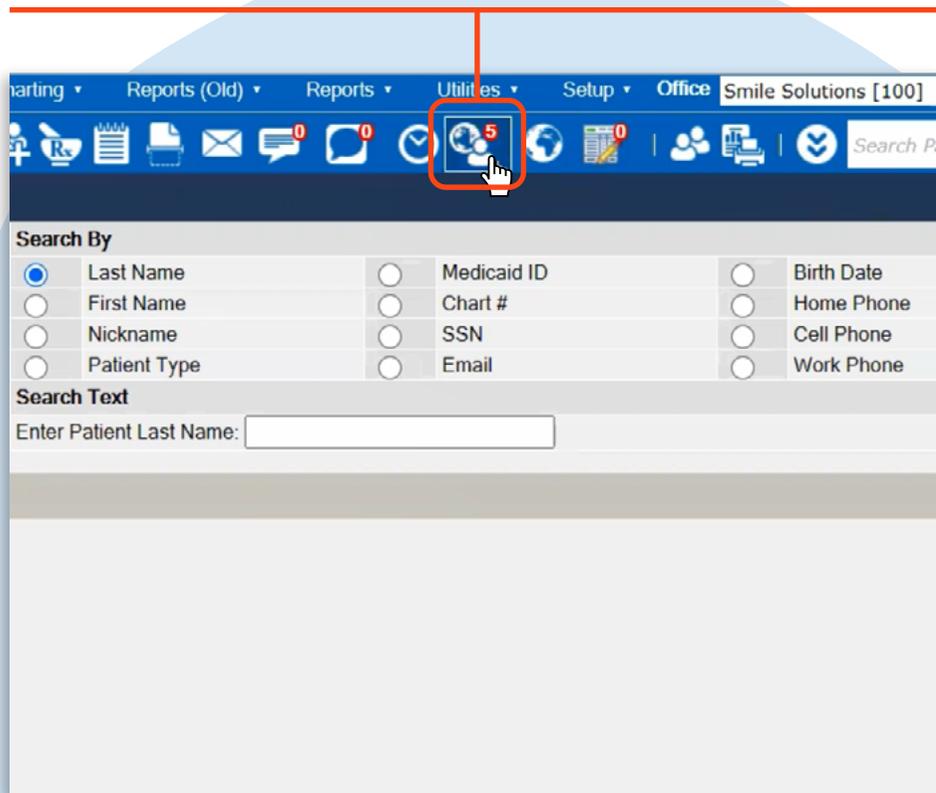
The patient has now been successfully registered. The Patient Overview screen will show all their details.

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

Add a Dependent from Online New Patient Registrations

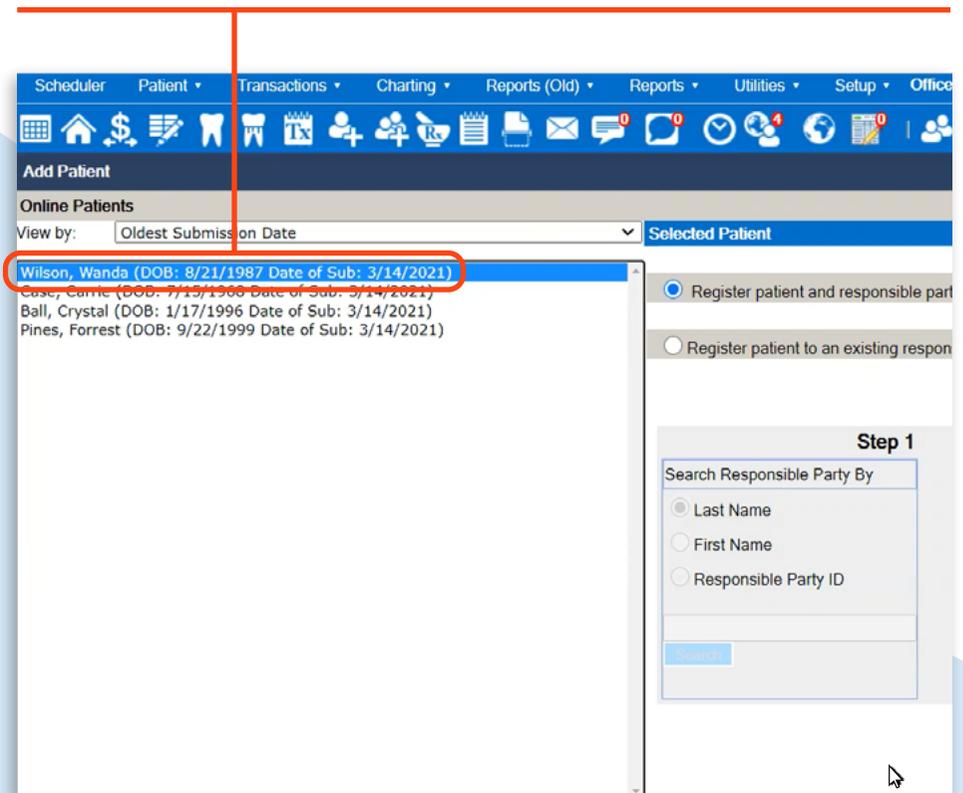
Step 1

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.

The screenshot displays the Denticon software interface. At the top, there is a navigation bar with menus for Charting, Reports (Old), Reports, Utilities, Setup, and Office. The current office is identified as 'Smile Solutions [100]'. Below the navigation bar, a dropdown menu shows 'Selected Patient: Wilson, Harvey (DOB: 4/5/1984)'. A list of sub-records is visible on the left, with the first one selected: 'Sub: 3/14/2021'. The main area shows two radio button options: 'Register patient and responsible party.' (selected) and 'Register patient to an existing responsible party. (Entered responsible party ID)'. Below these options is a 'Step 1' form titled 'Search Responsible Party By'. This form has three radio button options: 'Last Name' (selected), 'First Name', and 'Responsible Party ID'. A search input field and a 'Search' button are also present. At the bottom of the form, there are three buttons: 'Print Registration' (highlighted with a red box), 'Add Patient', and 'Delete Patient'. The footer shows '© 2021 Planet DDS | Privacy Policy | Page Time Left (hh:mm:ss) 1:59:11'.

To the right of the main interface is a detailed patient profile for 'Smile Solutions' at '3990 Westerly Place Suite 200, Newport Beach, CA 92660'. The profile includes contact information and a 'PLANET DENTICO' logo. The profile is divided into several sections:

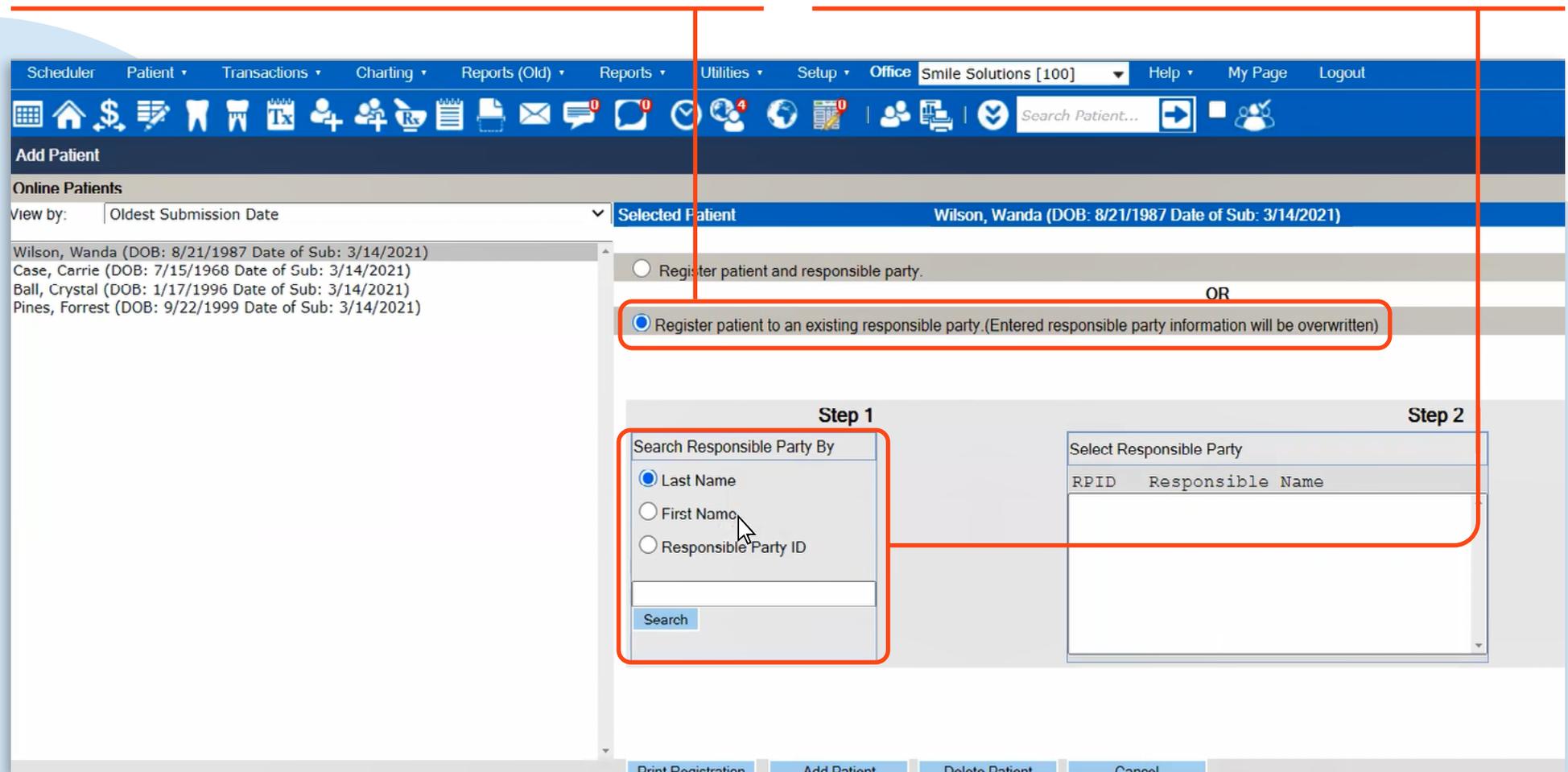
- PATIENT PERSONAL INFORMATION:** A table with fields for Title, Nickname, Birth Date (04/05/1984), Age (36), Last, First (Wilson, Harvey), Marital Status (Married), Sex (Male), Address (9641 Main Street), Home # (6667775555), Work # (4612), City, State, Zip (Firestone Park CA 90001), Cell # (6667775556), Drive Lic, Emergency Contact (Jeffrey Wilson - Father), Emergency Phone # (999), Email, Student (No), SSN, Referral Type (Internet-Website), Referred By (God), and School Name.
- PERSON RESPONSIBLE/GUARANTOR FOR PAYING BILLS:** A table with fields for Title, Nickname, Birth Date (04/05/1984), Age (36), Last, First (Wilson, Harvey), Marital Status (Married), Sex (Male), Address (9641 Main Street), Home # (6667775555), Work # (4612), City, State, Zip (Firestone Park CA 90001), Cell # (6667775556), Drive Lic, and SSN. This section is highlighted with a red box.
- DO YOU HAVE PRIMARY DENTAL INSURANCE?:** A table with fields for Group No/Name (2000-600), Insurance Name (Principal Financial), Phone # (8002474695), Employer Name (Printing Solutions), Subscriber Last, First (Wilson, Harvey), Subscriber Address (9641 Main Street), City, State, Zip (Firestone Park, CA, 90001), and Relationship to.
- DO YOU HAVE SECONDARY DENTAL INSURANCE?:** A table with fields for Group No/Name, Insurance Name, Phone #, Employer Name, Subscriber Last, First, Subscriber Address, City, State, Zip, and Relationship to.

Step 4

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

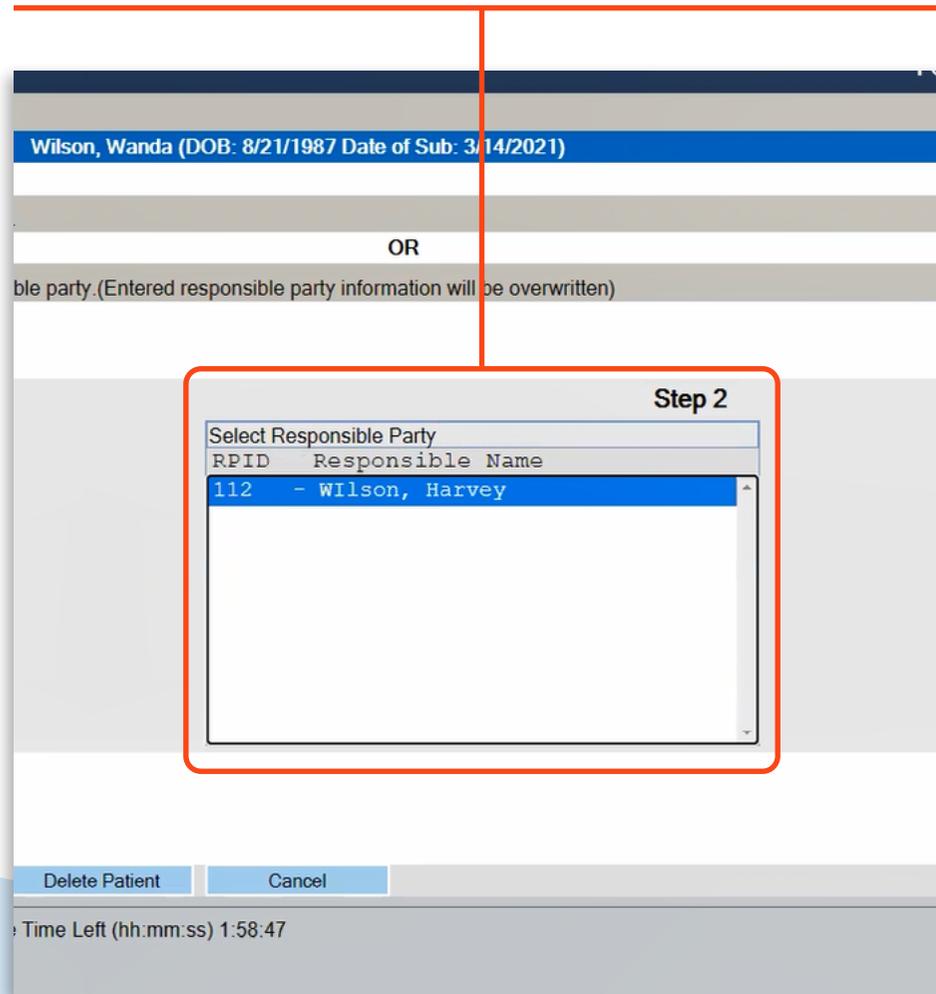
Step 5

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.**



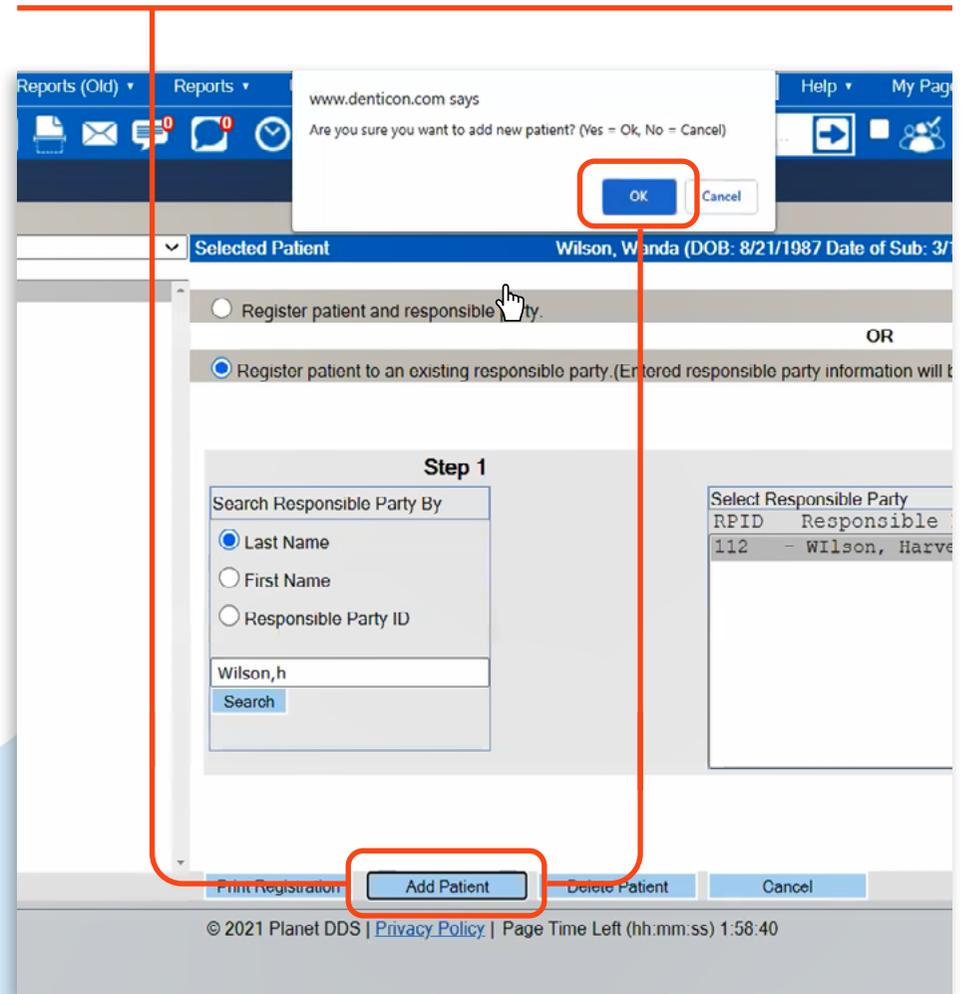
Step 6

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.

dent Information

21/1987 33 Last, First* Wilson Wanda

41 Main Street

estone Park CA 90001

Sex* Female

Health Care Guardian Phone

Coverage Type*

- No Coverage
- Primary Dental
- Secondary Dental
- Primary Medical
- Secondary Medical
- My Preferred Appointment Times Edit

Rel. to Resp* Please Select

Chart #

SSN

Home # 666-777-5555

Cell # 666-777-5557

Student No

School Name

Emergency Contact Wilma Jones - Mother

Office

Fee Schedule Please Select

Ref. Provider* LOPEZC : Lopez, Carlos D

Ref. Hygienist None

Referral Type* Internet-Website

Referred By

Referred To Please Select

Ref. To Date

Allowed 1000 characters

Remaining 1000 characters

Over 30 Over 60 Over 90 Over 120

Primary Dental Insurance >> Cancel

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**.

Scheduler Patient Transactions Charting Reports (Old)

Add New Member :: Step 2 : Add Primary Dental Plan

Primary insurance carrier & employer name entered while re

Group No/Name 2000-600

Search Insurance Plan

Search by beginning with

Search Text Printing Solutions

Search For Employer Name

Search In Account Plans

Search

Plan Information

Group No.*

Deductible Information

- Individual Ded.
- Individual Rem.
- Family Ded.
- Family Rem.

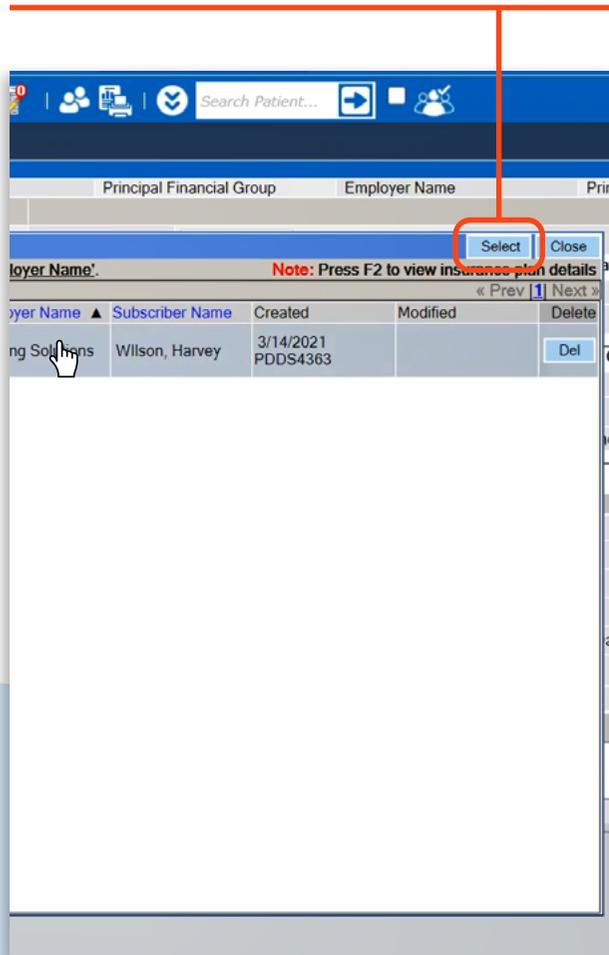
Subscriber Information

Member Subscriber

Last, First*

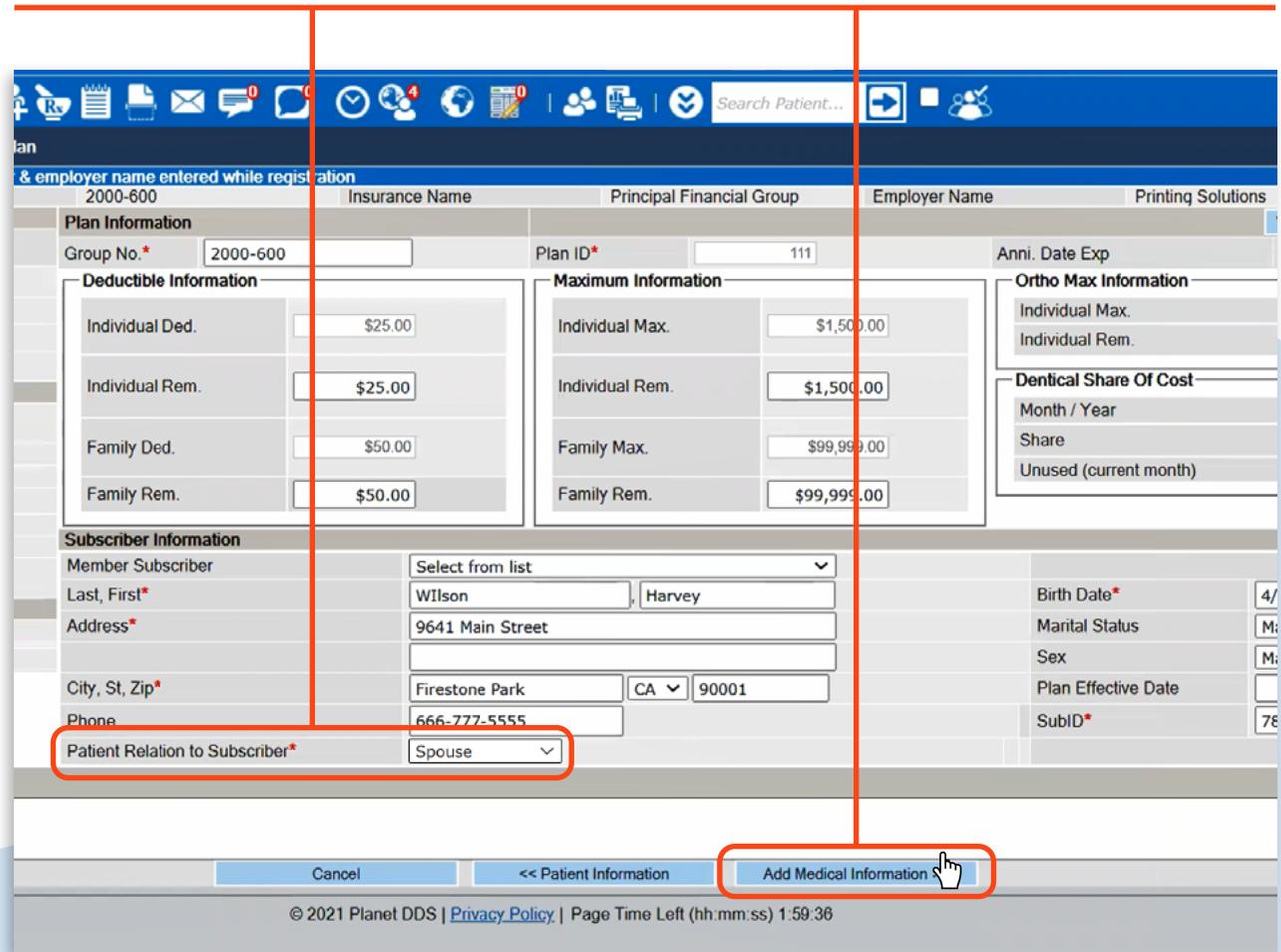
Step 10

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.

Smile Solutions [100] | Help | My Page | Logout

Medical Alerts
Dental Questionnaire
Medical Questionnaire

Wilma Jones
777-666-5555
Mother

Dr. Lee
777-777-7777
No

No

Cancel << Primary Dental Insurance **Add Recall Information >>** No to all med alerts

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Step 13

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

Charting | Reports (Old) | Reports | Utilities

Schedule Appt

Recall Due Date	Sched. Dt

Primary Dental Insurance **Finish**

Page Time Left (hh:mm:ss) 1:59:59

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		
(H) : 666-777-5555	Fee Schedule i	Dental	
(C) : 666-777-5557	Provider	Lopez, Carlos DDS	
(W):	Hygienist	Carrier	
Birth Date	Referral Type	Internet-Website	
8/21/1987	Referred By	Group	
Age / Sex	Referred To	Carrier	
33 / F	Last Perio Chart	Subscri	
Patient Type		Relatic	
Patient Note		Individ	
Medical Alerts: (3/14/2021 11:38 PM PT) <i>Questionnaire</i>	Aspirin	Ind. M:	
		Ind. De	

Recalls [Edit Recall](#)

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

Appointments [Archived Appt](#) [New Appt](#)

Date	Time	Office	Operatory	Status	Prdr	Len	User
No records to display.							

Regular Payment Plan Agreement [Detail](#) [View Ortho Plan](#)

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

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The dependent has now been successfully registered.

The Patient Overview screen will show all their details.