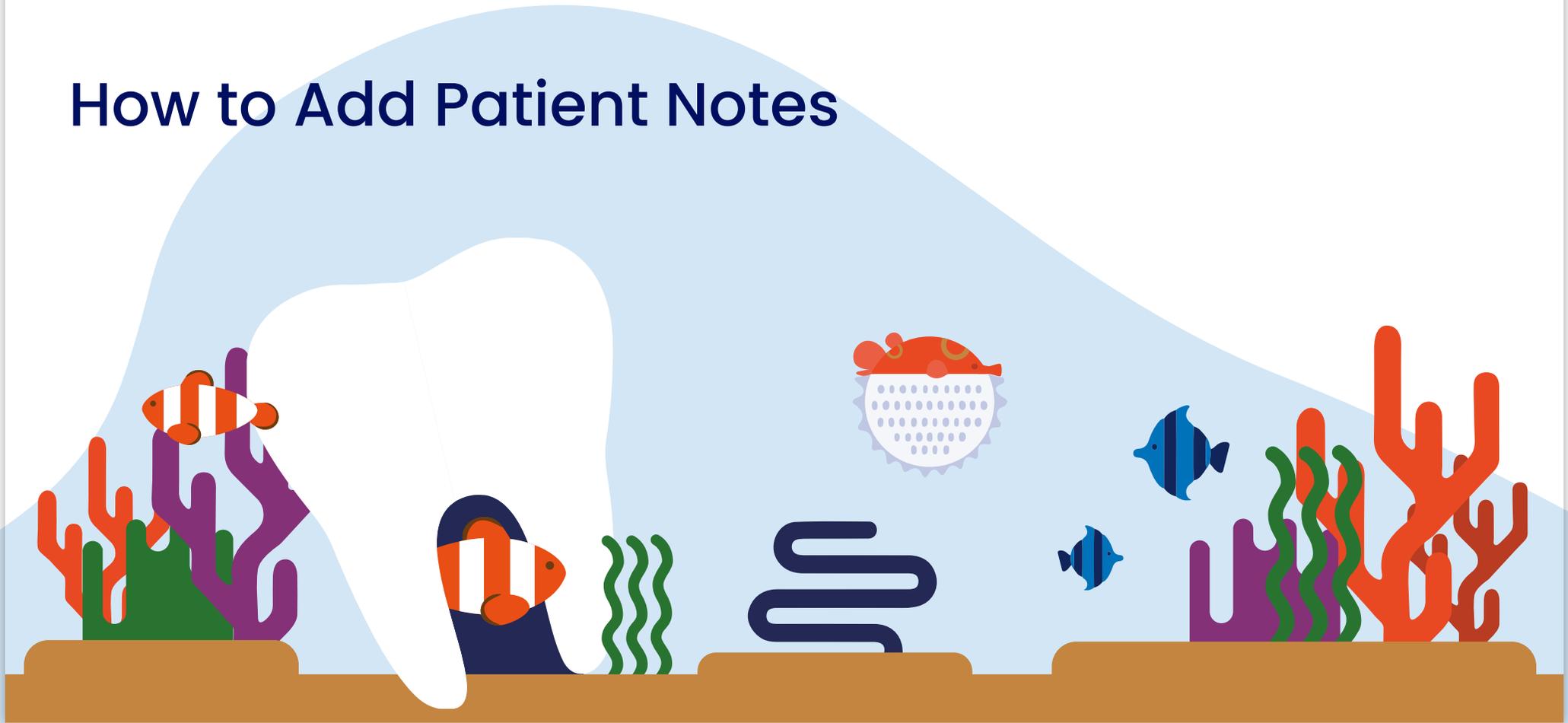




Denticon - Basic Clerical

How to Add Patient Notes



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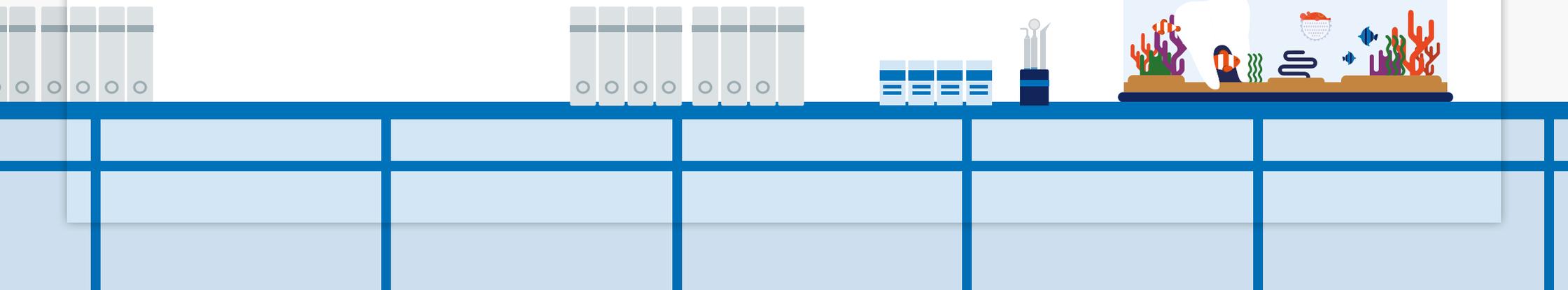
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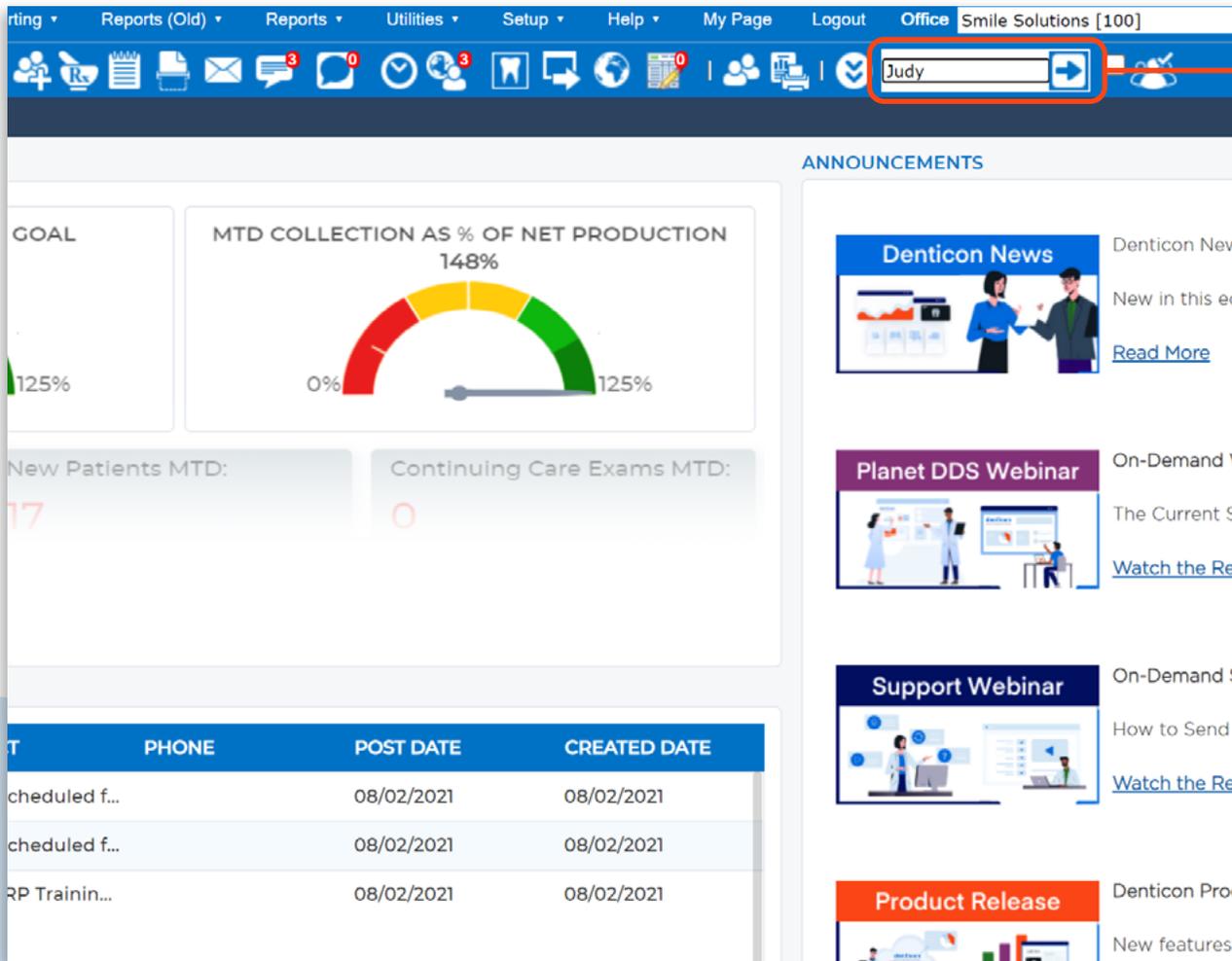
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Accessing Patient Notes

Step 1

To locate a patient file, type their last name into the 'Search Patient' field and click the **arrow**.



The screenshot shows the Denticon software interface. At the top, there is a navigation bar with various icons and a search field containing the name "Judy". A red box highlights the search field and the arrow button next to it. Below the navigation bar, there are several sections: "ANNOUNCEMENTS" with a "Denticon News" section, a "Planet DDS Webinar" section, and a "Support Webinar" section. On the left side, there is a "GOAL" section with a gauge chart showing "MTD COLLECTION AS % OF NET PRODUCTION" at 148%. Below the gauge, there are two boxes for "New Patients MTD:" (17) and "Continuing Care Exams MTD:" (0). At the bottom, there is a table with columns for "PHONE", "POST DATE", and "CREATED DATE".

PHONE	POST DATE	CREATED DATE
cheduled f...	08/02/2021	08/02/2021
cheduled f...	08/02/2021	08/02/2021
RP Trainin...	08/02/2021	08/02/2021

Step 2

Select the patient from the list.

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

Search Patient or Responsible Party PGID :4363 / OID :10

Search For: Patient Responsible Party

Search By: Last Name First Name Nickname Patient Type Medicaid ID Chart # SSN Email

Search In: Birth Date Home Phone Cell Phone Work Phone Patient ID Responsible Party ID Responsible Party Type Subscriber ID Current Office All Offices Search in Office Group Include Inactive Patients

Search Text: Enter Patient Last Name:

Search Last Search Add New Patient

We have found following patients matching your search criteria in all offices.

PatID	RPID	Chart #	Last Name	First Name	MI	NickName	Birth Date	SSN	Phone #	Email	Type	Prdr	Next Recall	Office	MIC
186	159		Judy	Brian			8/22/1995		(C): 949-355-7941 (H): 949-355-7941			LOPEZC		Bri	
114	111		Judy	Jane			1/1/1997		(C): 666-777-8888 (H):	janej97@gmail.com		LING		Bri	
187	159		Judy	Katie			6/22/1989		(C): (H): 949-355-7941			LOPEZC		Bri	

Page 1 of 1, rows 1 to 3 f

The Patient Notes screen will show you any existing notes and will identify the note type, the date the note was created, and whether the note has an attachment (represented by the paper clip icon).

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

Search Patient...

Notes PGID :4363 / OID :100

Patient: Judy, Jane
 (H) : BD : 1/1/1997
 (C) : 666-777-8888 ID : 114
 (W) :

Type Age/Sex: 24 / F
 First Visit:
 Last Visit:

Responsible: Judy, Jane
 Balance: 0.00 BD : 1/1/1997
 Est Ins: 0.00
 Est Pat: 0.00

Prim. Ins: MET LIFE
 877-638-3379 SubID : 65432175
Sec. Ins:

Filter : Show All Exclude System Notes

Delete	Edit		Note Type	Notes	Created Date
Delete	Edit		Financial Notes	Patient Signed Payment Policy form with initial online Paperwork/forms	3/14/2021 - PDDS4363
Delete	Edit		Appointment Notes	Sent Welcome Letter to Jane. [3/15/2021]	3/14/2021 - PDDS4363
Delete	Edit		Patient Notes	File Name: 4363_114_637513603898693207_OnlinePatientRegistration.pdf	3/14/2021 - PDDS4363

Page 1 of 1, rows 1 to 3 from

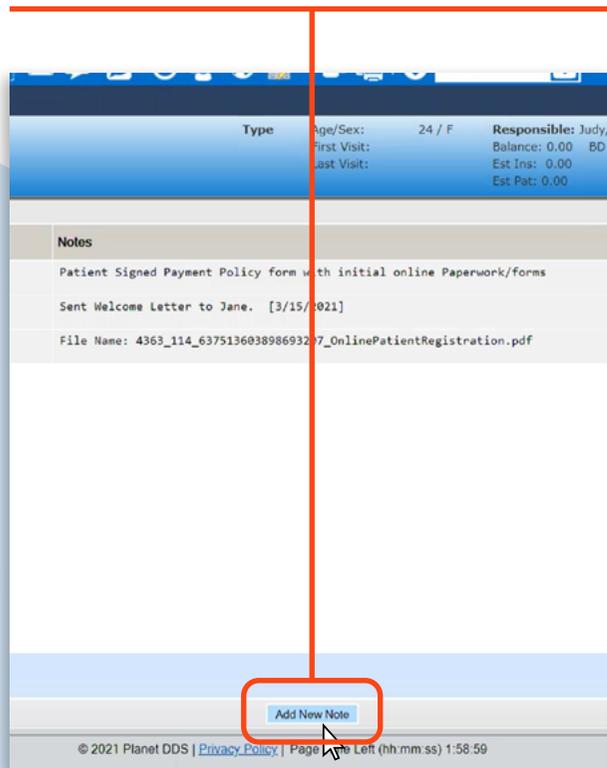
[Add New Note](#)

© 2021 Planet DDS | [Privacy Policy](#) | Page Time Left (hh:mm:ss) 1:59:41

Adding Scanned Documents

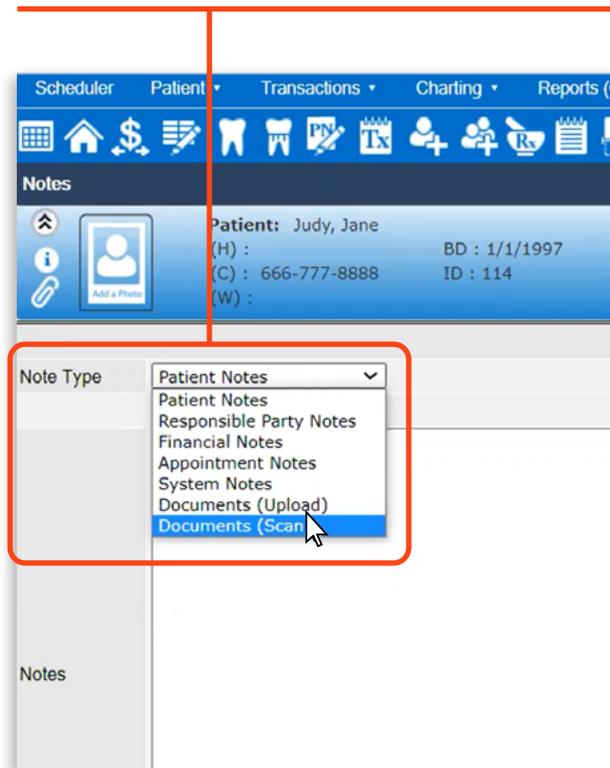
Step 1

On the 'Notes' screen, click **Add New Note**.



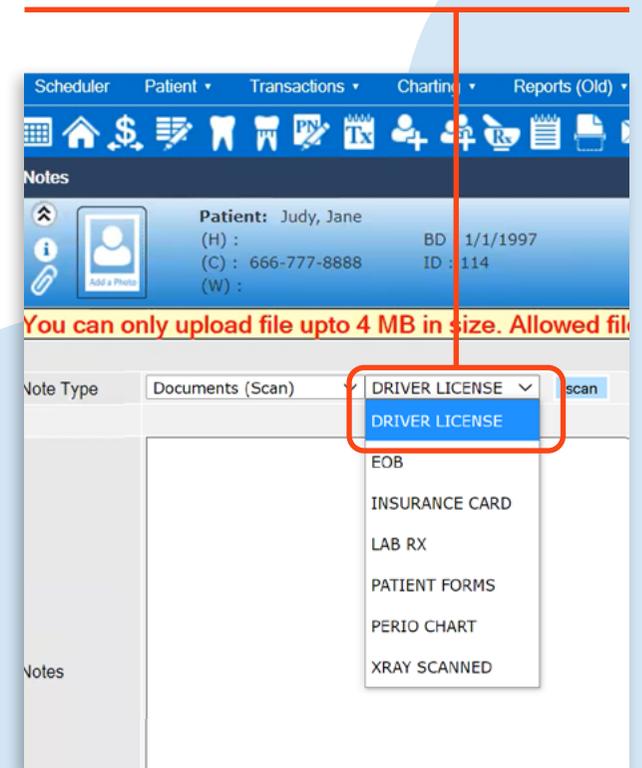
Step 2

From the 'Note Type' dropdown list, select **Documents (Scan)**.



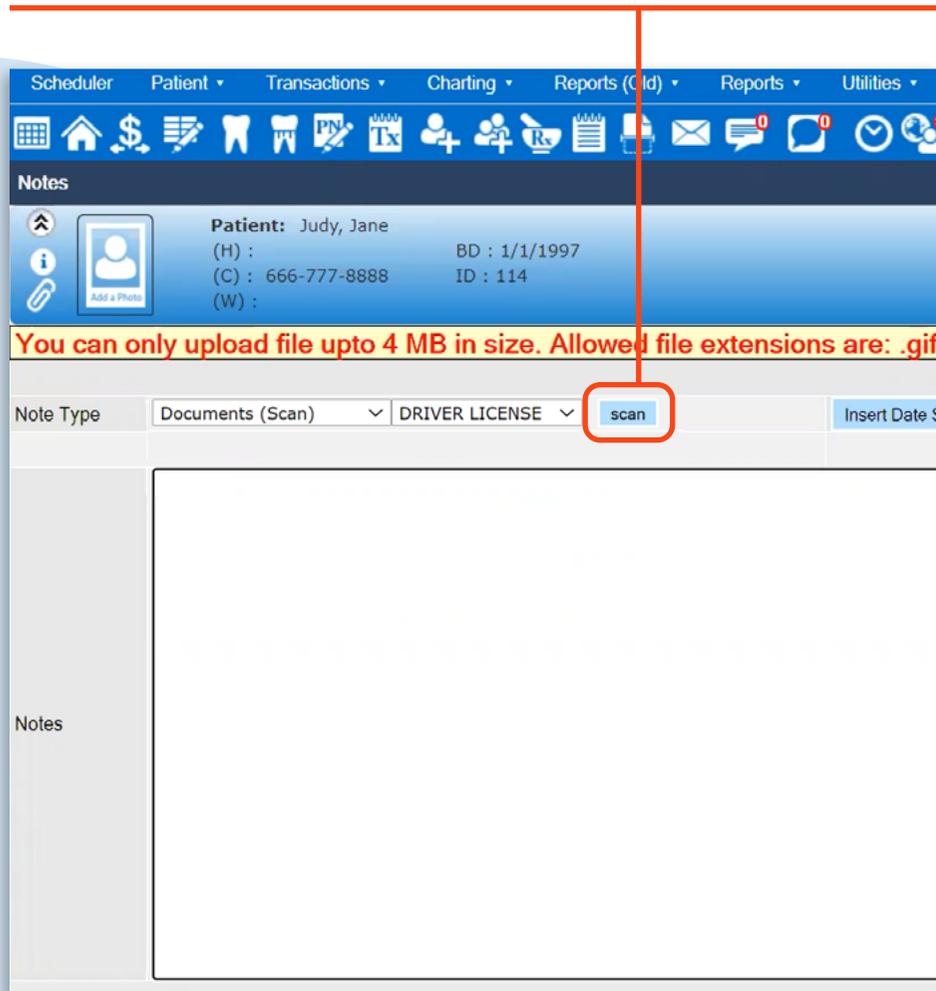
Step 3

Select the relevant category for the document from the second dropdown list.



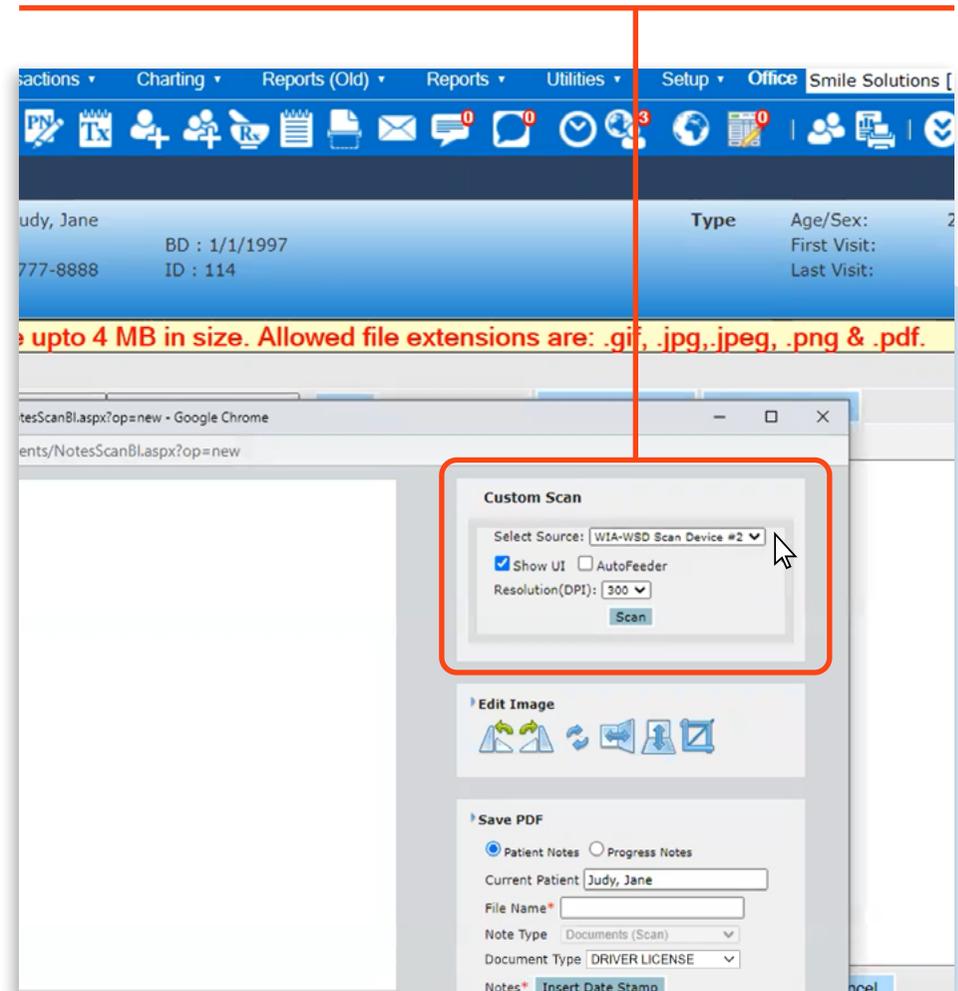
Step 4

Click **Scan**.



Step 5

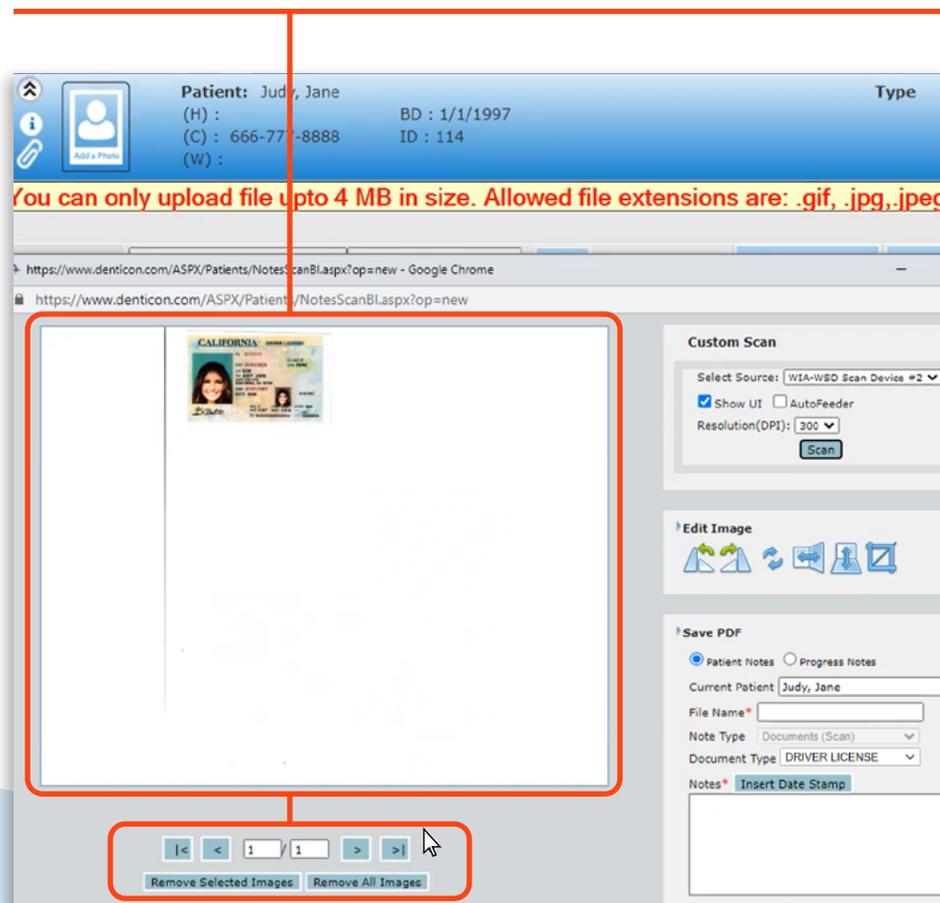
Select the relevant device from the 'Select Source' field and select the 'Resolution', then click **Scan**.



Step 6

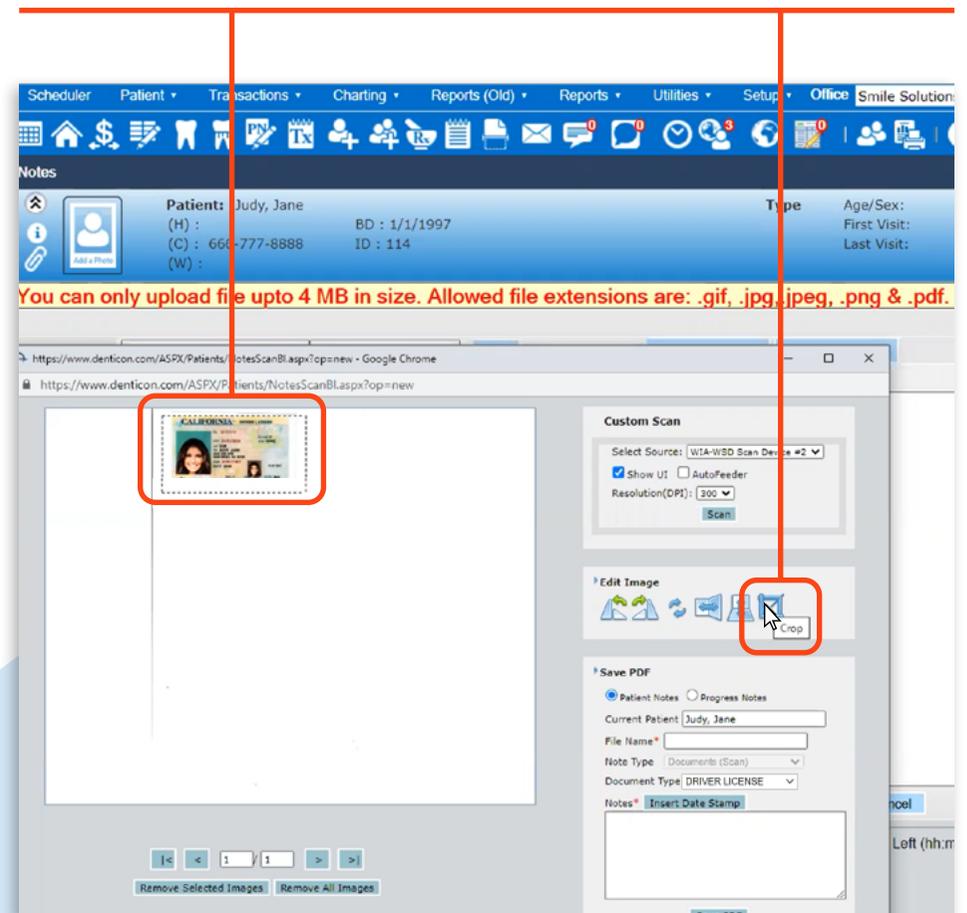
Ensure that the appropriate fields are selected from the scanner properties window, then click **Scan**.

The scanned document will appear on screen. Images can be removed or cropped from this window.



Step 7

If necessary, crop the image by left-clicking and dragging the mouse around the desired crop area, then click the **Crop** icon under the 'Edit Image' section.



Step 8

Under the 'Save PDF' section select either **Patient Notes** or **Progress Notes** as relevant. Type a file name for the document and click **Insert Date Stamp**. Add any extra information under the 'Notes' text entry field, then click **Save PDF**.

The screenshot shows the Denticon software interface. The main window displays a scanned image of a California Driver License for Judy Jane Doe. The interface includes a 'Custom Scan' section with options for source, UI, and resolution. Below that is an 'Edit Image' section with various icons. The 'Save PDF' section is highlighted with a red box and contains the following fields and options:

- Patient Notes Progress Notes
- Current Patient: Judy, Jane
- File Name*: Drivers License.pdf
- Note Type: Documents (Scan)
- Document Type: DRIVER LICENSE
- Notes*: Insert Date Stamp
- Driver's License

The 'Save PDF' button is located at the bottom of the 'Save PDF' section and is highlighted with a red circle. A red line connects the 'Save PDF' button to the 'Notes*' field.

Created By	4363TSMITH	Mod
Created On	03/15/2021 06:40:28 AM (PST)	Mod

Left (hh:mm:ss) 1:56:31

The scanned document has now been successfully uploaded to the patient's account. The document attachment can be viewed by clicking the paper clip icon next to the note.

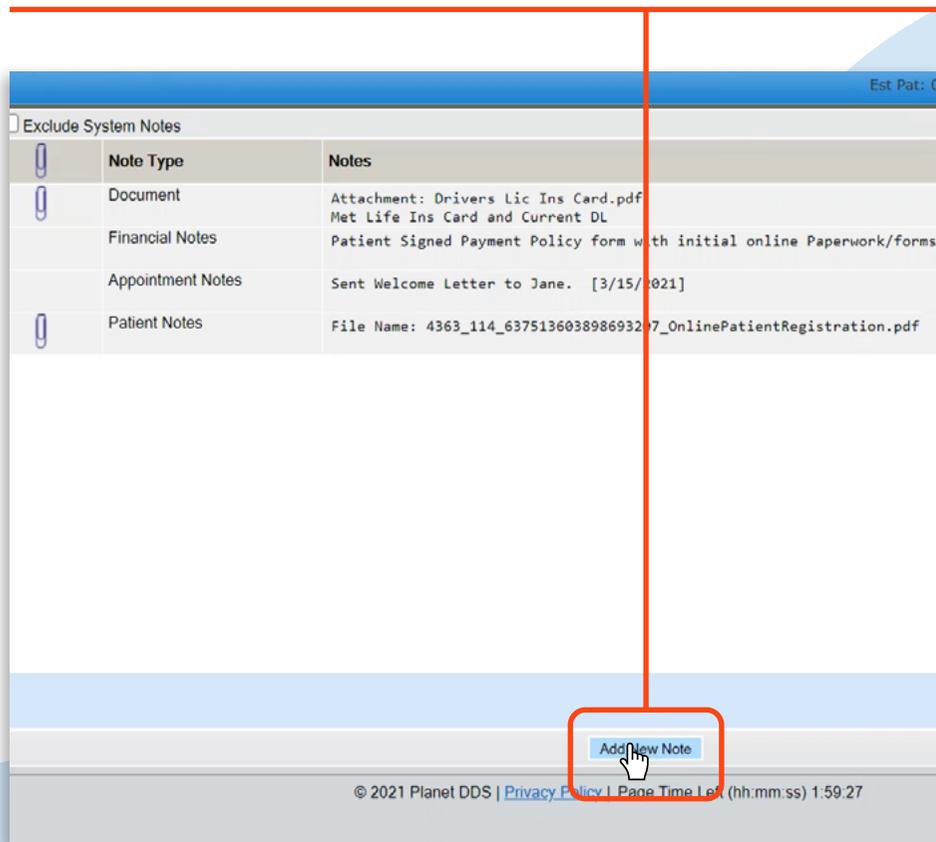
The screenshot shows the Denticon software interface. At the top, there is a navigation bar with various icons and a search field. Below this is a patient information header for 'Judy, Jane' with details like birth date (1/1/1997) and insurance information. The main area displays a list of notes. The first note is highlighted with a red box and contains a document attachment icon (a paper clip) and the text 'Attachment: Drivers License.pdf'. Other notes include 'Financial Notes', 'Appointment Notes', and 'Patient Notes'. At the bottom, there are navigation controls and a footer with copyright information.

Delete	Edit		Note Type	Notes	Created Date
Delete	Edit		Document	Attachment: Drivers License.pdf Drivers License	3/15/2021 - 4363TSMITH
Delete	Edit		Financial Notes	Patient Signed Payment Policy form with initial online Paperwork/forms	3/14/2021 - PDDS4363
Delete	Edit		Appointment Notes	Sent Welcome Letter to Jane. [3/15/2021]	3/14/2021 - PDDS4363
Delete	Edit		Patient Notes	File Name: 4363_114_637513603898693207_OnlinePatientRegistration.pdf	3/14/2021 - PDDS4363

Adding a General Note

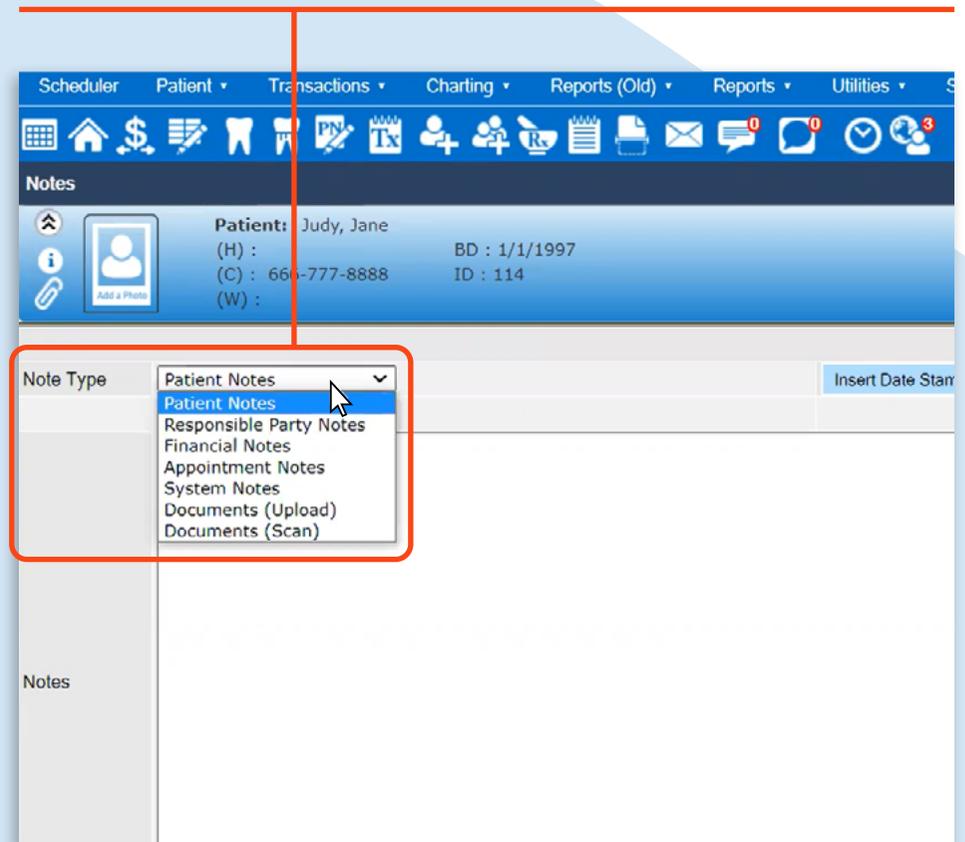
Step 1

On the 'Notes' screen, click **Add New Note**.



Step 2

Ensure that **Patient Notes** is selected as the 'Note Type'.



Step 3

Type the note information into the 'Notes' text entry field, click **Insert Date Stamp**, and then click **Save**.

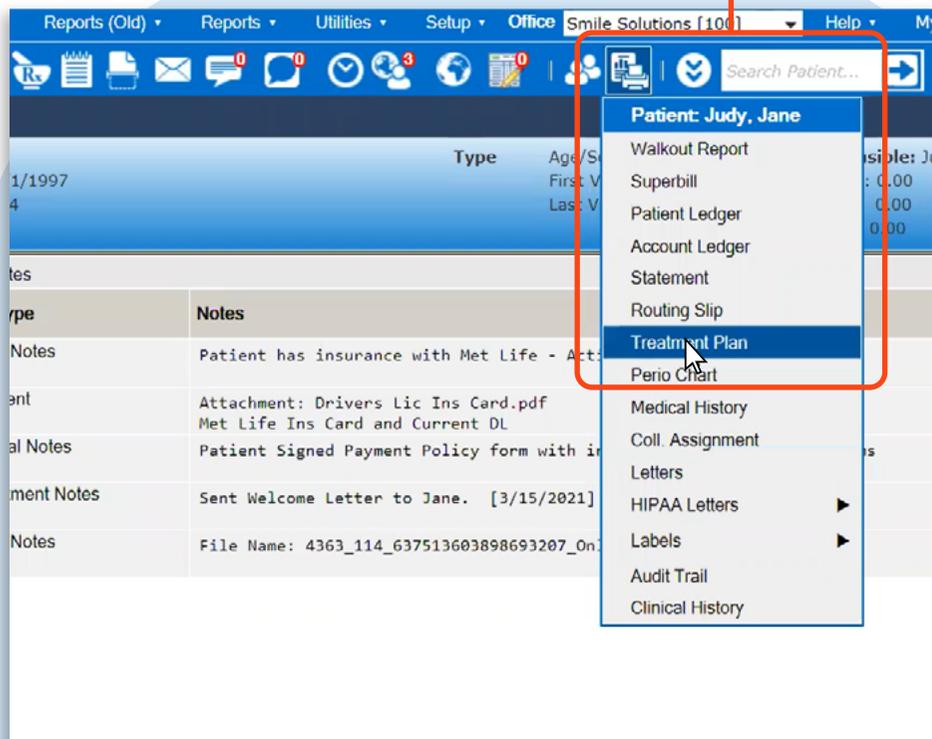
The screenshot shows the Denticon software interface. At the top, there is a menu bar with options like Scheduler, Patient, Transactions, Charting, Reports (Old), Reports, Utilities, Setup, and Office. Below the menu bar is a toolbar with various icons. The main area is divided into sections. The top section is titled 'Notes' and contains patient information for Judy, Jane, including her phone number, birth date, and ID. Below this is a 'Note Type' dropdown menu set to 'Patient Notes'. A text entry field contains the text 'Patient has insurance with Met Life - Active [3/15/2021]'. To the right of this field is an 'Insert Date Stamp' button. At the bottom right of the interface are 'Save' and 'Cancel' buttons. Red boxes highlight the text entry field, the 'Insert Date Stamp' button, and the 'Save' button. A red line connects these three elements, indicating the sequence of actions.

The note has now been successfully uploaded to the patient's account.

Adding a Treatment Plan

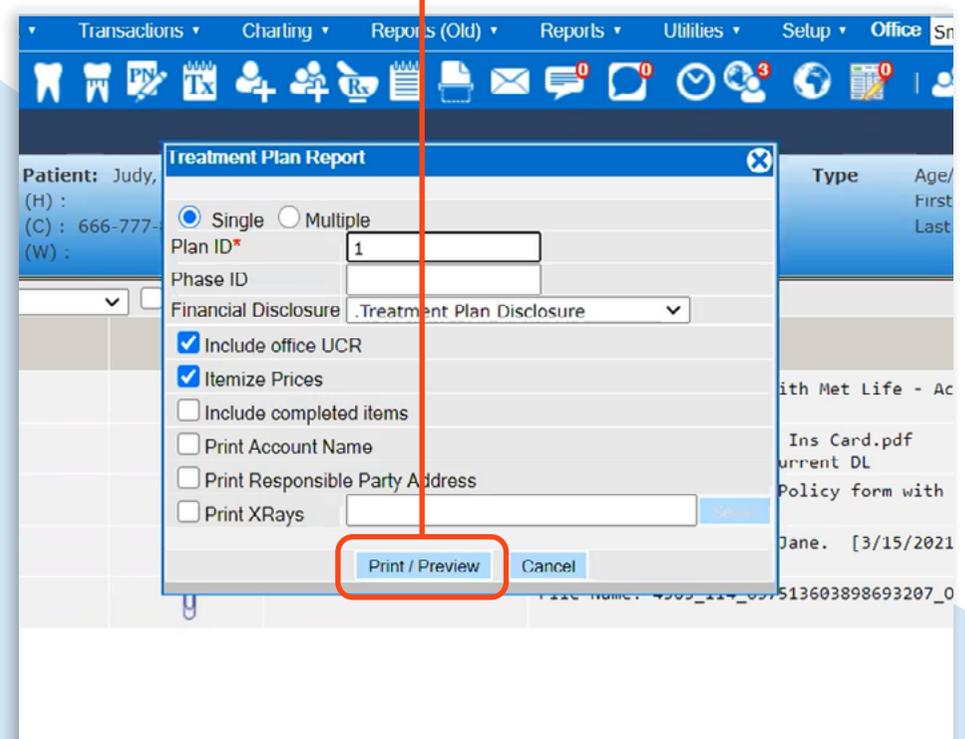
Step 1

On the 'Notes' screen, click the **printer** icon in the toolbar, then select **Treatment Plan**.



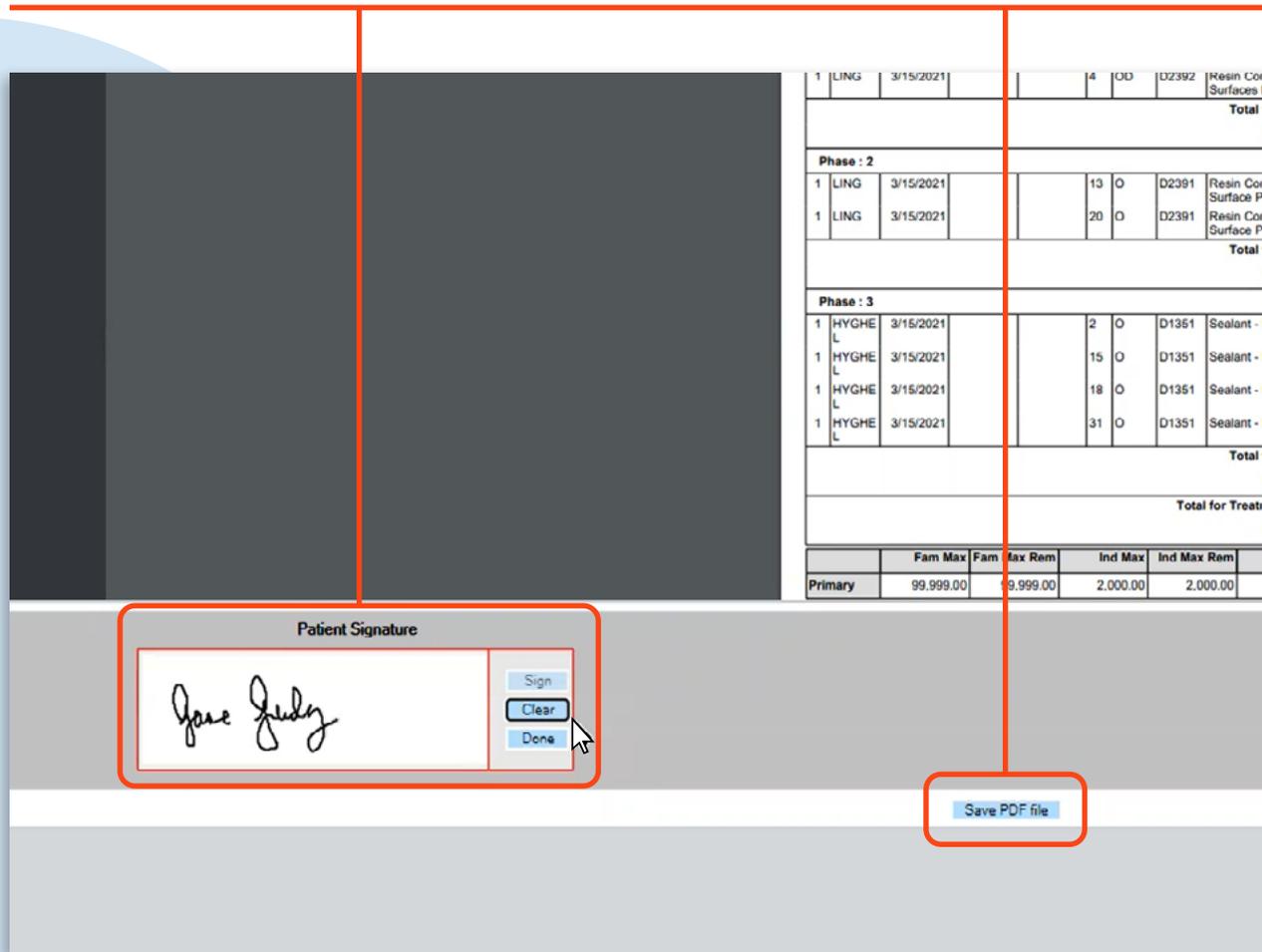
Step 2

Set the relevant parameters for the Treatment Plan Report and click **Print/Preview**.



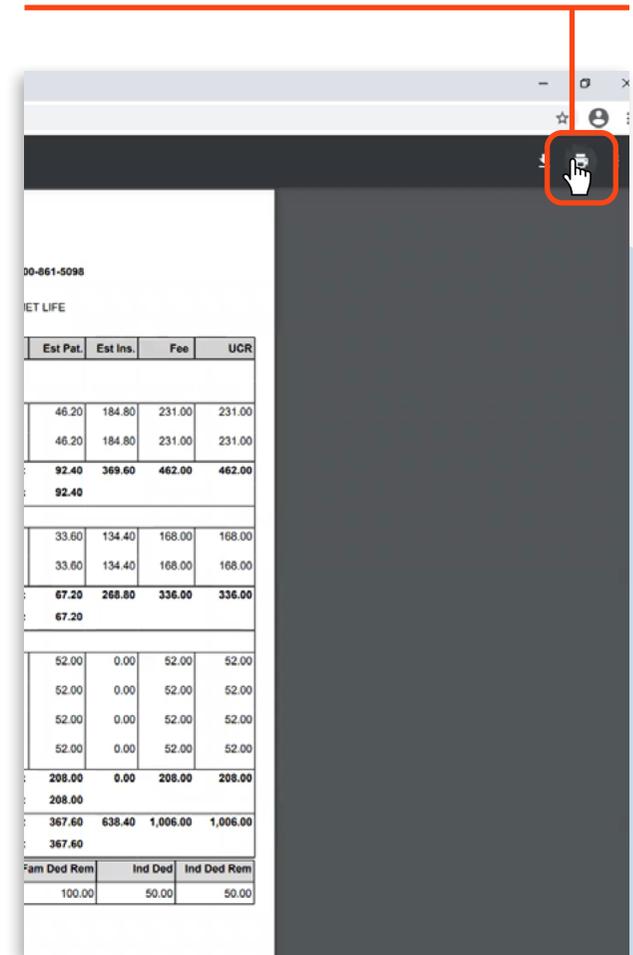
Step 3

If a signature pad is connected to the workstation being used, have the patient sign the treatment plan, then click **Save PDF File**.



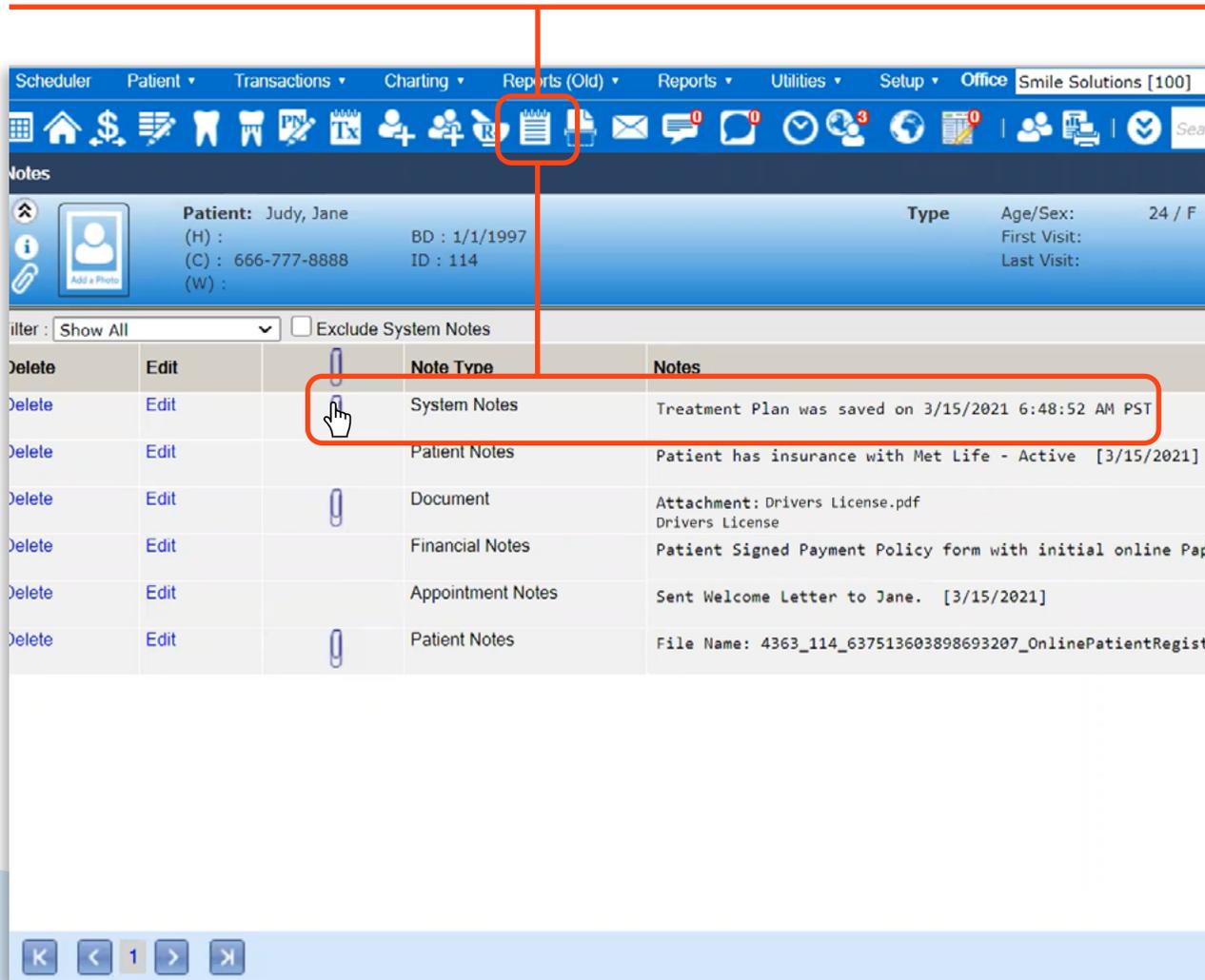
Step 4

Click the **printer** icon to print the Treatment Plan if the patient requires a copy.



Step 5

Click the **Patient Notes** icon to refresh the screen.

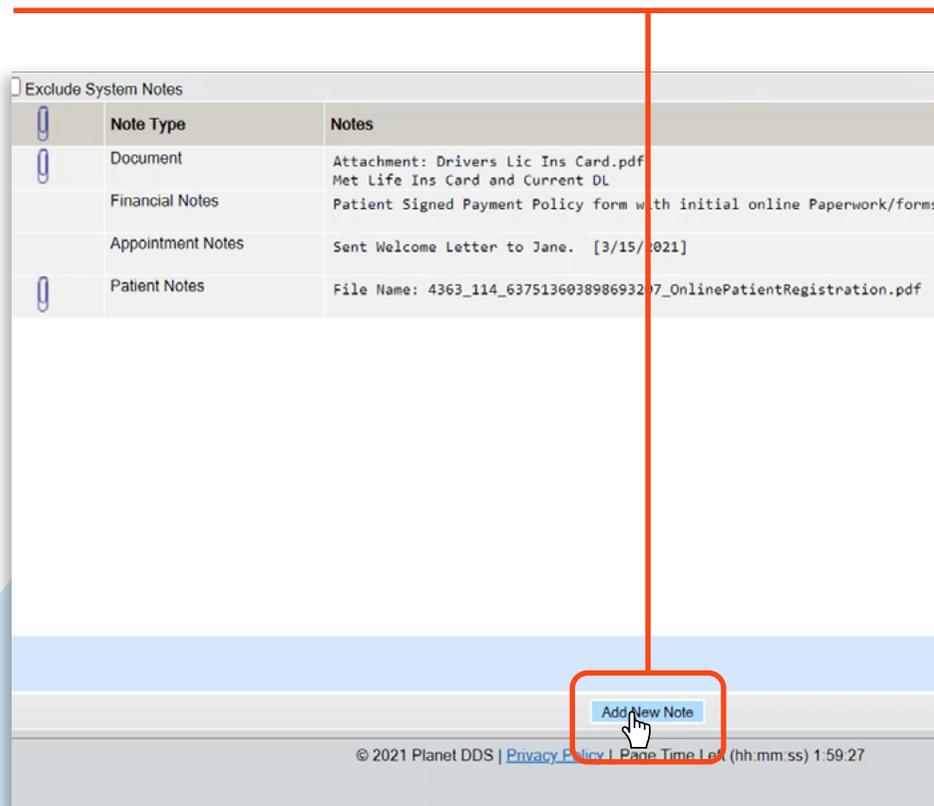


The Treatment Plan will now appear as a note.

Adding a PDF Document from the Clipboard

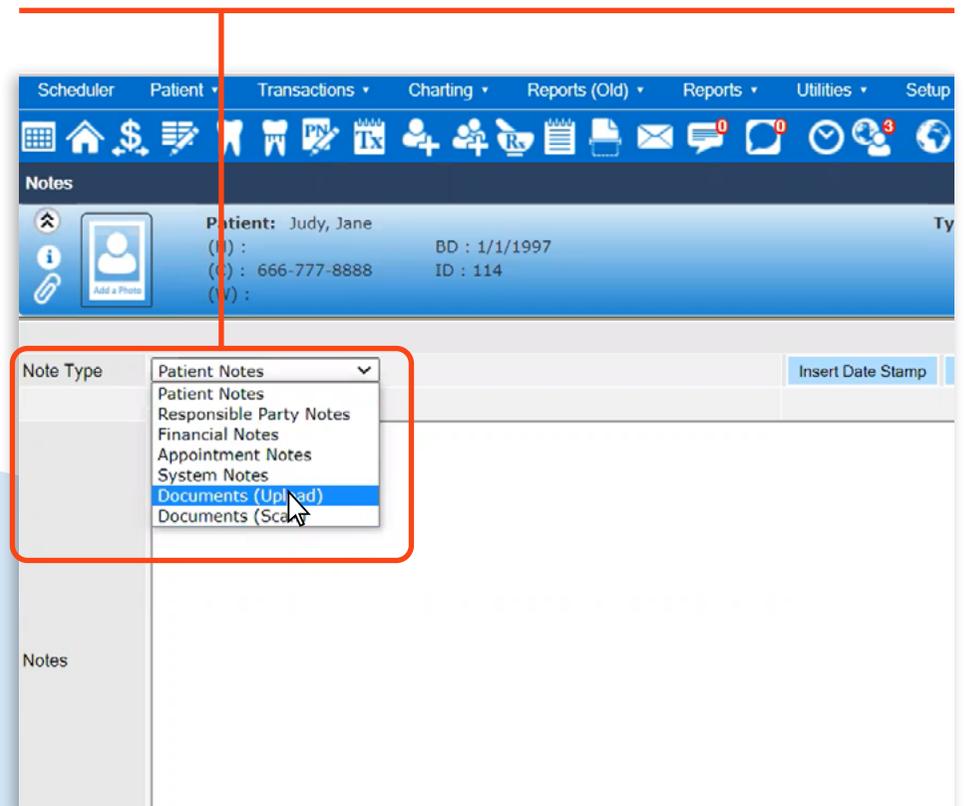
Step 1

On the 'Notes' screen, click **Add New Note**.



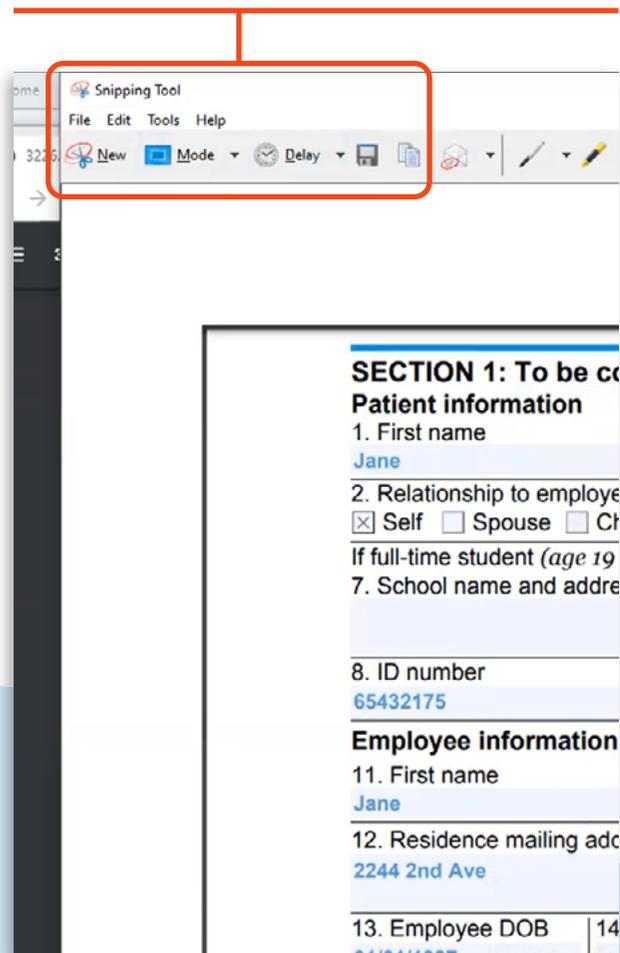
Step 2

From the 'Note Type' dropdown list, select **Documents (Upload)**.



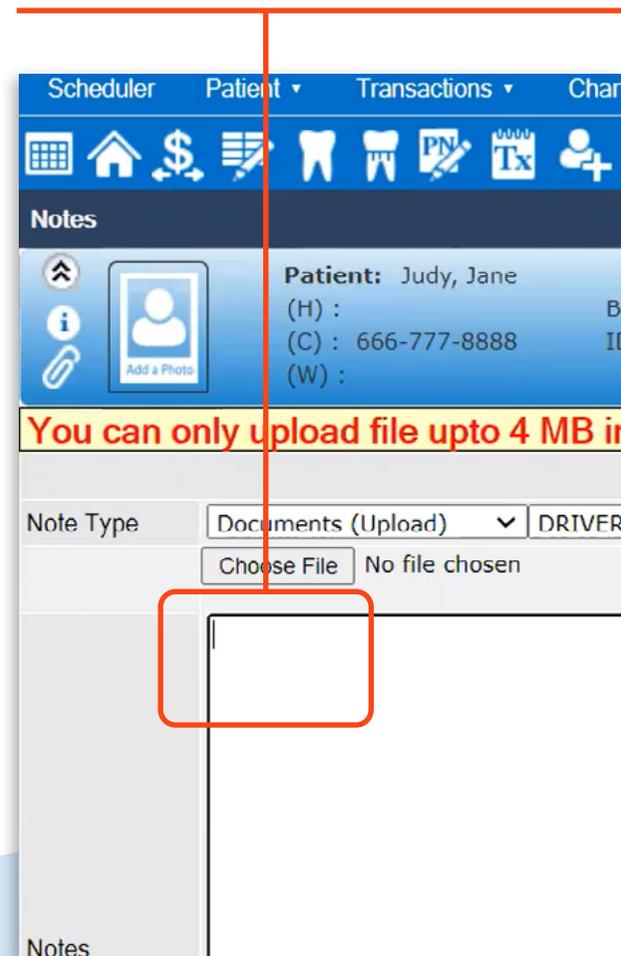
Step 3

Use the device's snipping tool to take a screenshot of the desired content and click **Ctrl+C** to copy the snip.



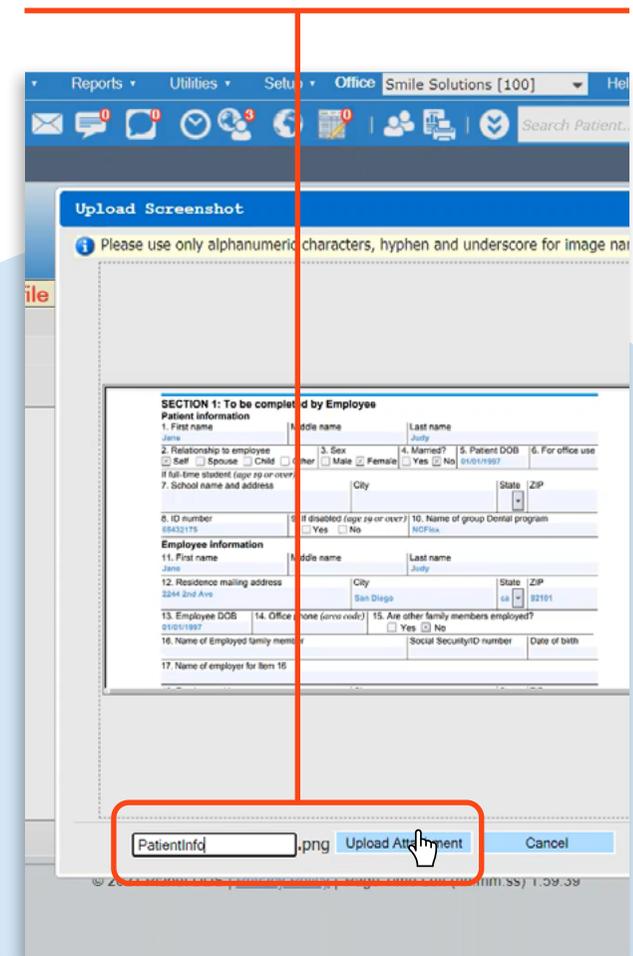
Step 4

Click into the 'Notes' text entry field, and paste (**Ctrl+V**) the content.



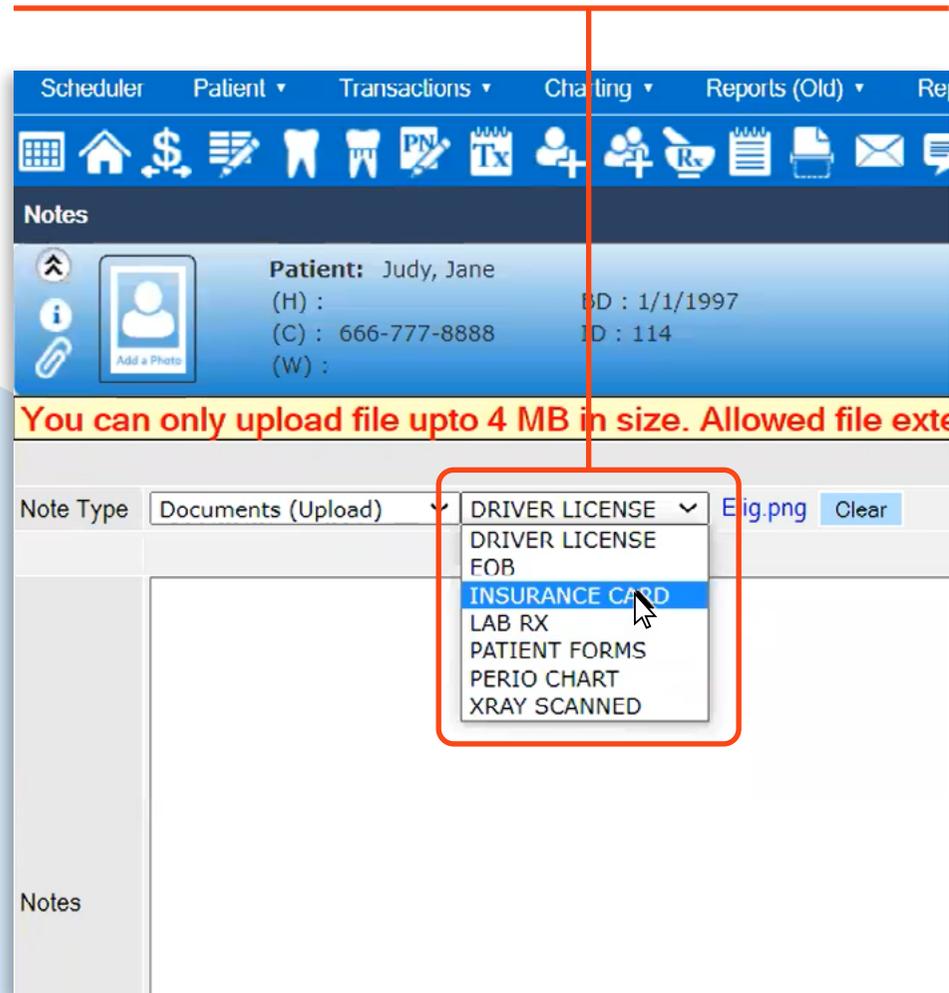
Step 5

In the 'Upload Screenshot' window, name the document and click **Upload Attachment**.



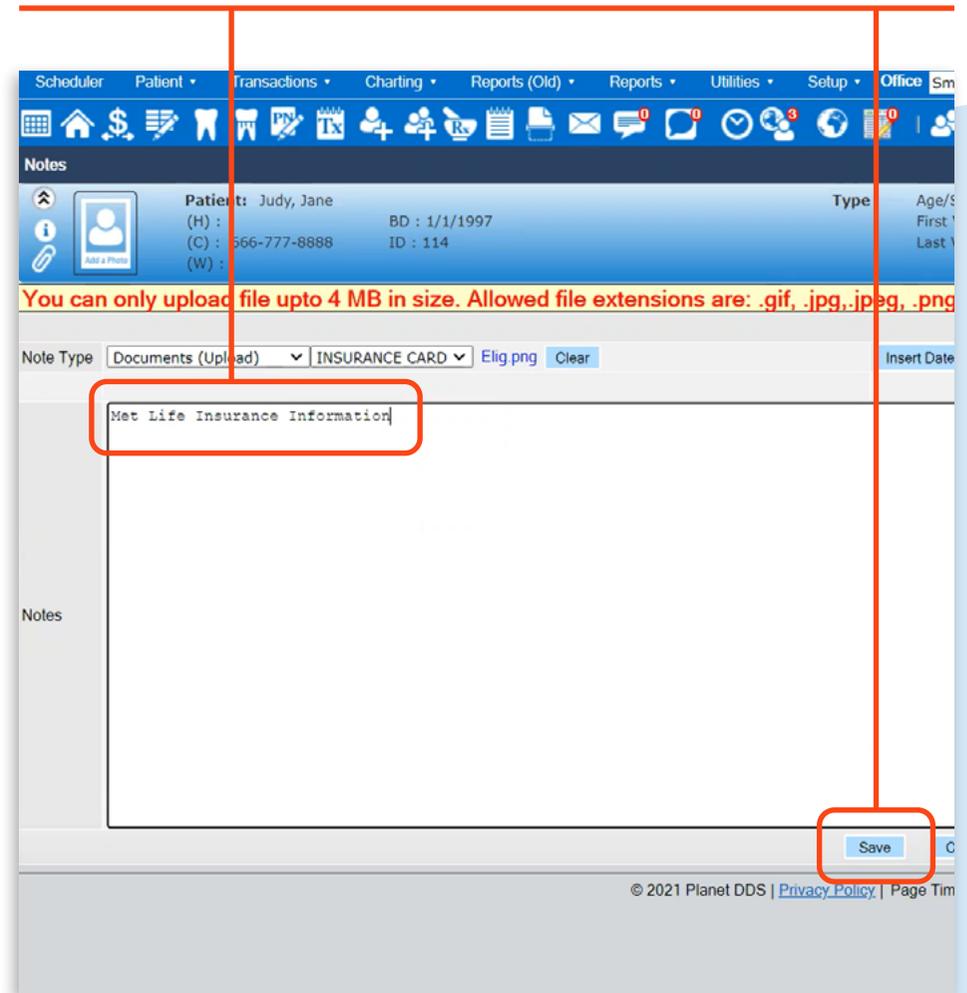
Step 6

Select the relevant category for the document from the second dropdown list in the 'Note Type' section.



Step 7

Type any extra information into the 'Notes' text entry field, then click **Save**.



The PDF document has now been successfully uploaded to the patient's account. The document attachment can be viewed by clicking the paper clip icon next to the note.

The screenshot shows the 'Notes' section of a dental software interface. At the top, there is a navigation bar with various icons and a search field. Below this, patient information for 'Judy, Jane' is displayed, including her birth date (1/1/1997), phone number (666-777-8888), and ID (114). The patient's age and sex are listed as 24 / F. The responsible person is 'Judy, Jane' with a balance of 0.00. The primary insurance is 'MET LIFE' with a subID of 65432175. The secondary insurance is listed as 'Sec. Ins:'. Below the patient information, there is a filter dropdown set to 'Show All' and a checkbox for 'Exclude System Notes'. A table of notes is displayed with columns for 'Delete', 'Edit', 'Note Type', 'Notes', and 'Created Date'. The second row of the table is highlighted with a red box, showing a paper clip icon next to a 'Document' note with the file name 'Elig.png' and the title 'Met Life Insurance Information'. Other notes include 'System Notes', 'Patient Notes', 'Document', 'Financial Notes', and 'Appointment Notes'.

Delete	Edit	Note Type	Notes	Created Date
Delete	Edit	Document	File Name: Elig.png Met Life Insurance Information	3/15/2021 - 4363TSMITH
Delete	Edit	System Notes	Treatment Plan was saved on 3/15/2021 6:48:52 AM PST	3/15/2021 - 4363TSMITH
Delete	Edit	Patient Notes	Patient has insurance with Met Life - Active [3/15/2021]	3/15/2021 - 4363TSMITH
Delete	Edit	Document	Attachment: Drivers License.pdf Drivers License	3/15/2021 - 4363TSMITH
Delete	Edit	Financial Notes	Patient Signed Payment Policy form with initial online Paperwork/forms	3/14/2021 - PDDS4363
Delete	Edit	Appointment Notes	Sent Welcome Letter to Jane. [3/15/2021]	3/14/2021 - PDDS4363
Delete	Edit	Patient Notes	File Name: 4363_114_637513603898693207_OnlinePatientRegistration.pdf	3/14/2021 - PDDS4363