



Denticon - Basic Clerical

How to Email or Text a Patient Using Denticon

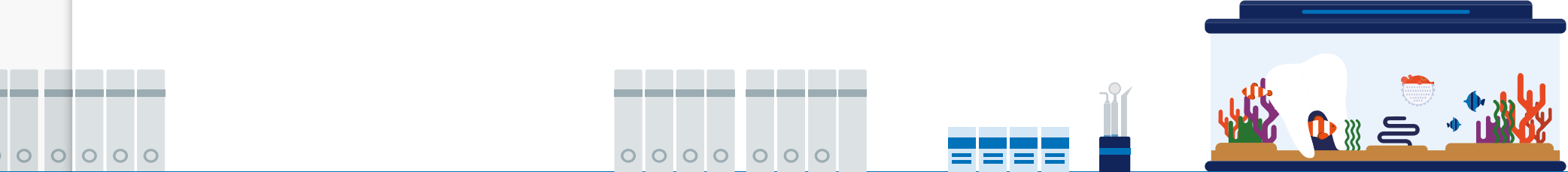


Contents

Set Patient Communication Preferences..... 3

Email or Text a Patient 5

Email or Text a Patient Using the Schedule.....10



Set Patient Communication Preferences

Step 1

On the 'Patient Overview' screen, click **Edit** in the Patient ID section.

The screenshot shows the 'Patient Overview' screen for Aaron Adams. The 'Patient Information' section includes fields for Nickname, Home Office, Patient ID (145), and various contact details. The 'Edit' button next to the Patient ID is highlighted with a red box and a red arrow. Below this, there are sections for Recalls, Appointments, and Billing. The footer contains copyright information for Planet DDS and a privacy policy link.

Patient Information		Patient ID : 145		Edit	
Nickname	Adams, Aaron	Home Office	Smile Solutions	Add a Photo	
Address	3265 Ocean View Newport Beach, CA 92660	Chart #		Response	
Phone	(H) : (C) : 949-401-6434 (W) :	First Visit		Adams, Type : E training Home C	
Text my Cell	training@planetdds.com	Last Visit		Dental Insurance	
Birth Date	4/19/1984	Fee Schedule		Carrier Name CIGNA (PPO) Group # 2000 4000 (15) Carrier Phone 800-244-6224 Subscriber Adams, Aaron Relationship Self Individual Max \$1,500.00 Ind. Max Rem. \$1,500.00 Individual Ded \$25.00 Ind. Ded. Rem. \$25.00	
Age / Sex	36 / M	Provider	Lopez, Carlos DDS	Account Members	
Patient Type		Hygienist		Patient Name Age	
Medical Alerts:	(PT)	Referral Type	Internet-Website	Adams, Aaron 36	
		Referred By	Facebook	Adams, Abigail 38	
		Referred To		Billing	
		Last Perio Chart		Account Balance \$(Adams, Aaron \$(Adams, Abigail \$(Est. Insurance	

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	4/2/2021	01:00 PM

Date	Time	Office	Operatory	Status	Prdr	Len	User
4/2/2021	01:00 PM	Bri	LopezMain	Confirmed	LOPEZC	60	PDDS4363

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

© 2021 Planet DDS | [Privacy Policy](#) | Page Time Left (hh:mm:ss) 1:57:39

Step 2

Use the 'Preferred Contact Method' dropdown to make a selection before clicking **Save**.

Note: Ensure email addresses and phone numbers are correct for successful communication.

Note: To opt a patient out of a specific communication method, check the relevant box in the **Patient Status** section, then click **Save**.

The screenshot shows a patient record form for Aaron Adams. The 'Preferred Contact Method' dropdown menu is open, showing options: Text my Cell, No Preference, Call my Cell, Call my Home, Call my Work, Text my Cell (highlighted), and Email me. The 'Save' button at the bottom is also highlighted with a red box.

Type	Age/Sex:	36 / M	Responsible	Adams, Aaron	Prim. Ins:	CIGNA (PPO)
	First Visit:		Balance: 0.00	BD : 4/19/1984	800-244-6224	SubID : 654123
	Last Visit:		Est Ins: 0.00		Sec. Ins:	
			Est Pat: 0.00			

Party ID: 133
 Created by: PDDS4363
 Created on: 4/2/2021 5:45 AM PT
 Modified By: PDDS4363
 Modified On: 4/2/2021 2:07 PM PT
 Rel. to Resp*: Self
 Chart #:
 SSN: Show
 Home #:
 Cell #: 949-401-6434 Update
 Work #:
 Student: No
 School Name:
 Emergency Contact: Abigail Adams
 Office:
 Fee Schedule: Please Select
 Pref. Provider*: LOPEZC : Lopez, Carlos DDS
 Pref. Hygienist: None
 Referred To: Please Select

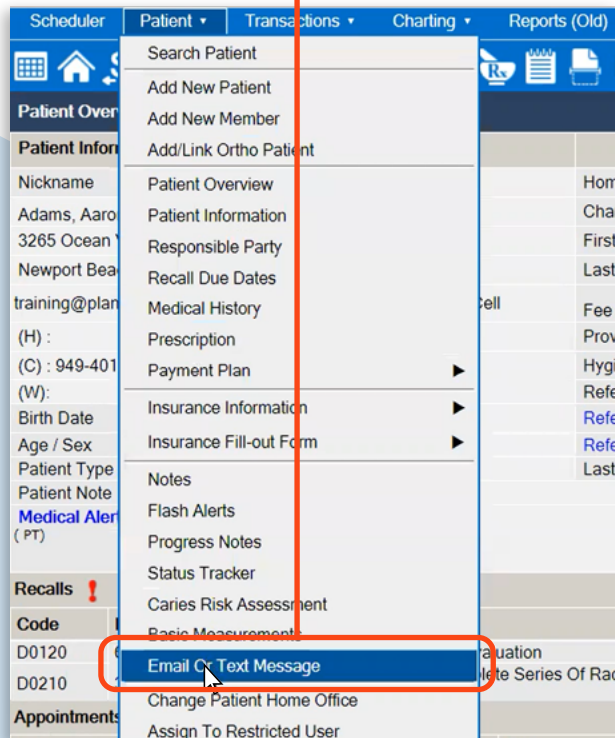
Buttons: Delete Patient, Patient Picture, Patient Finger-print, **Save**, Cancel

Communication preferences have now been updated.

Email or Text a Patient

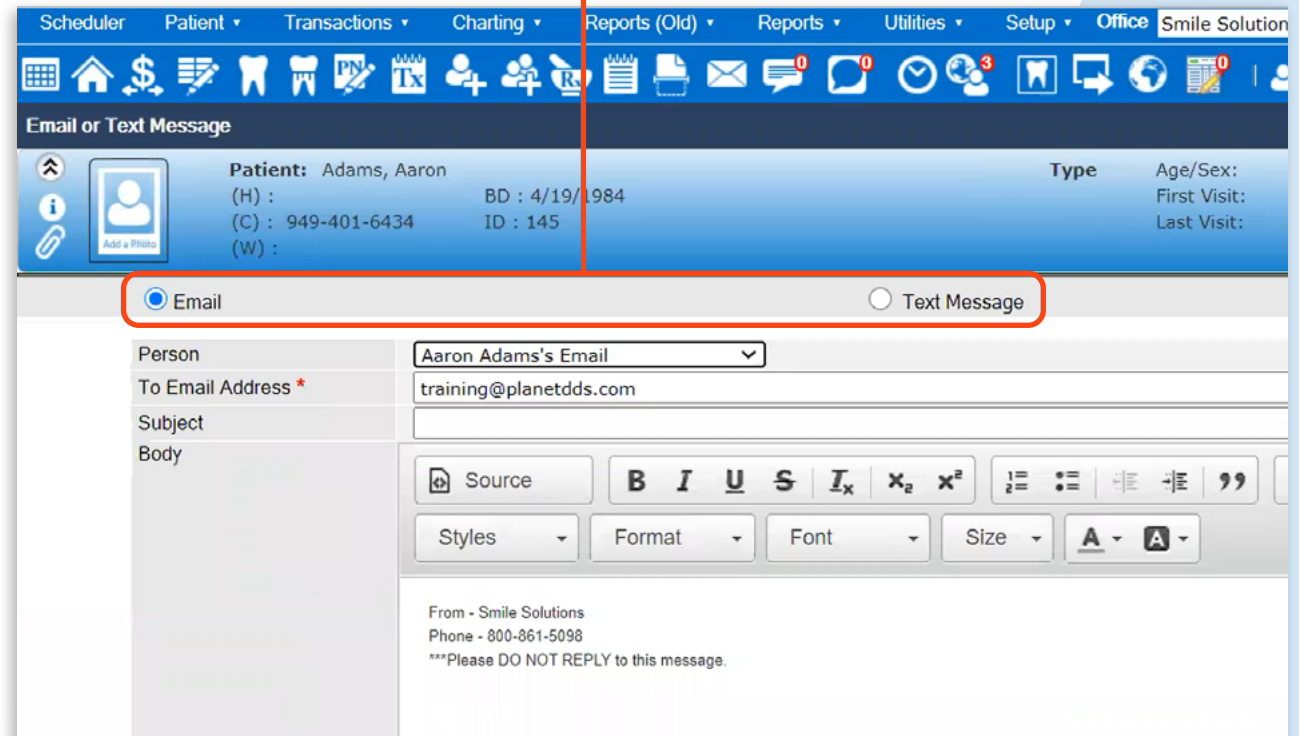
Step 1

Click **Patient** in the toolbar, then select **Email Or Text Message**.



Step 2

Check the **Email** or **Text Message** radio button.

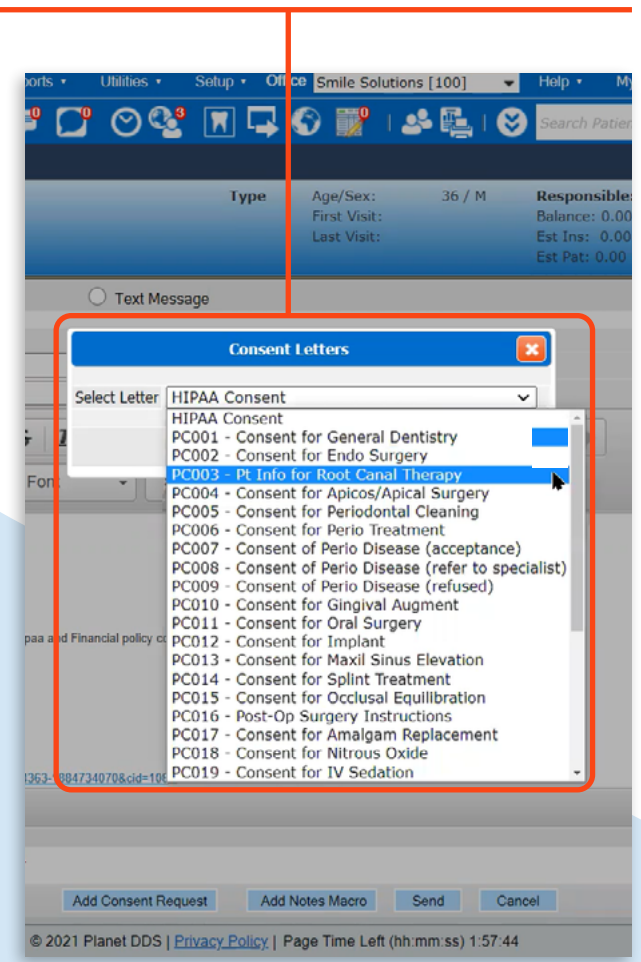
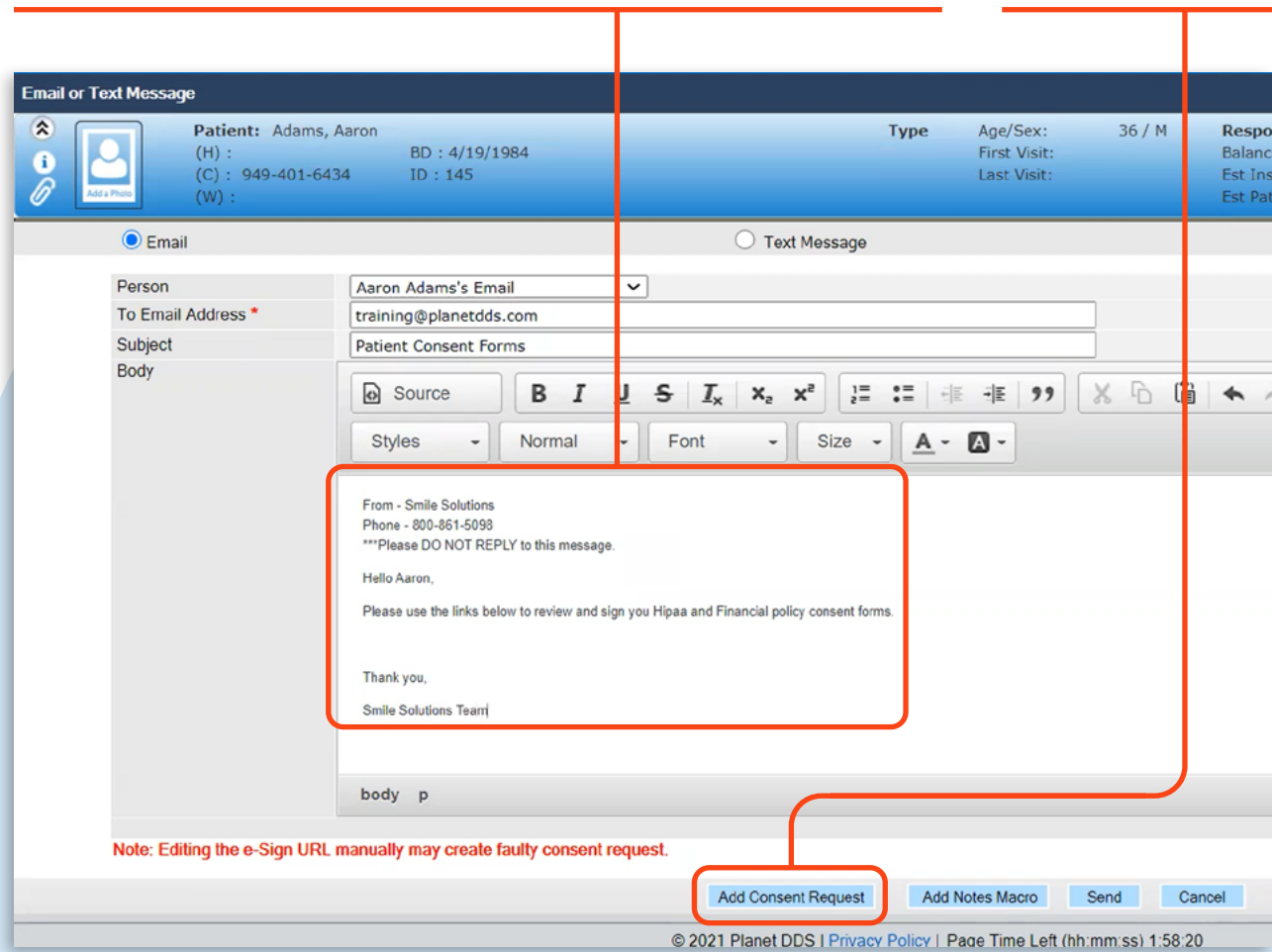


Step 3

Type your message and either click **Send** now, or if you need to add a Consent Request or Notes Macro, follow Steps 4-8.

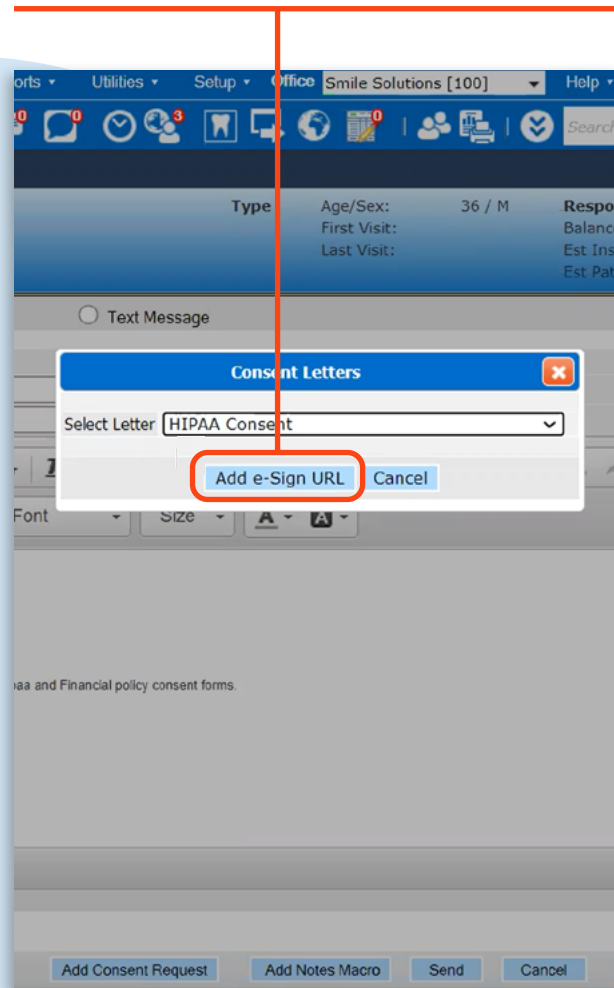
Step 4

Click **Add Consent Request** and choose the correct consent letter from the dropdown menu.



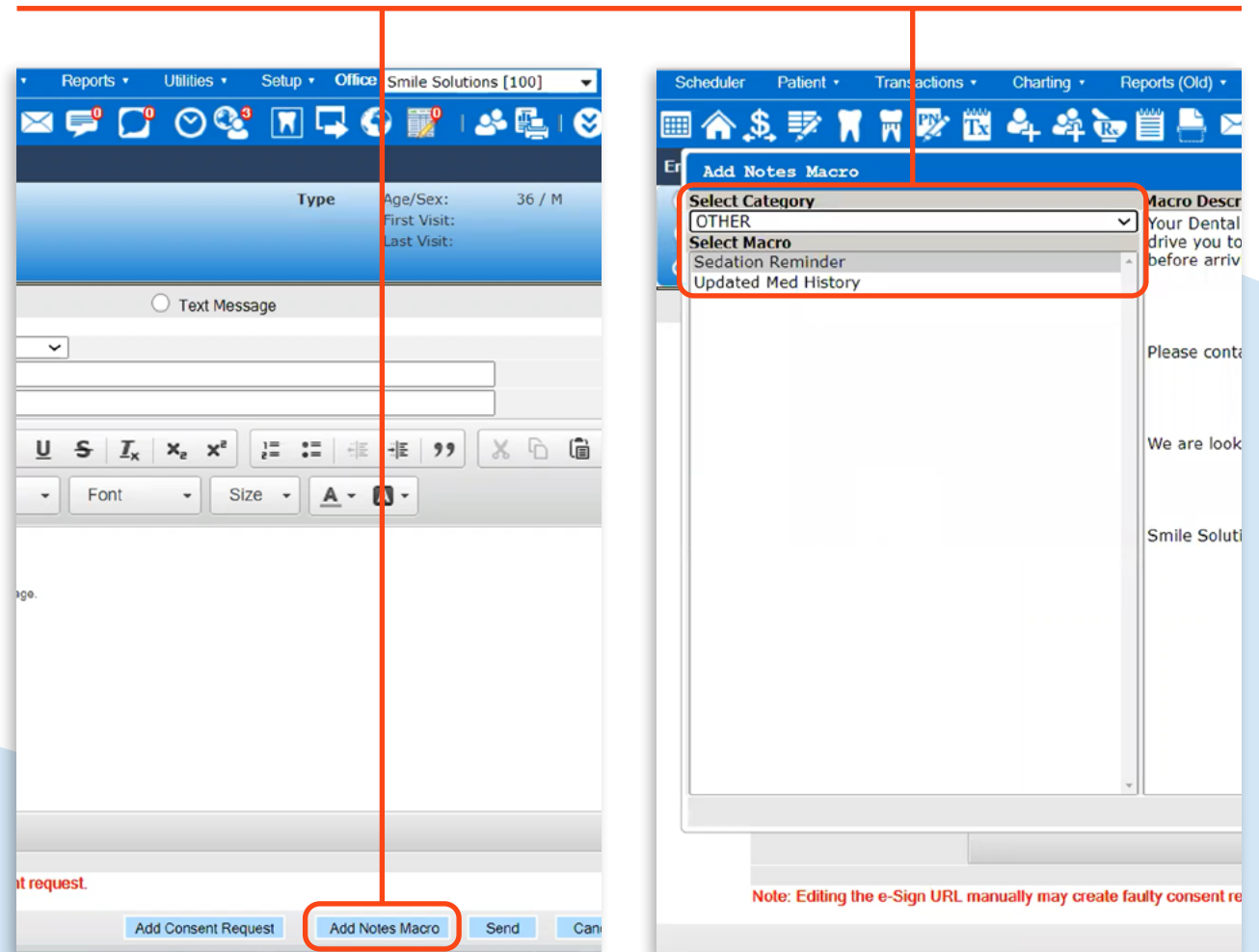
Step 5

To attach the consent form to your email or text, click **Add e-Sign URL**.



Step 6

To add a note template, click **Add Notes Macro** and select the **Category**, followed by the correct **Macro** from the dropdown menu.



Step 7

Click **Add Note** to attach the note macro to the email or text.

Note: Amend the note to personalize the message to the patient.
Keep in mind that when using text there is a character limit.

The screenshot shows the 'Add Notes Macro' dialog box in the Denticon software. The dialog has a blue header with the title 'Add Notes Macro'. Below the header, there are two main sections: 'Select Category' and 'Select Macro'. The 'Select Category' dropdown is set to 'OTHER'. The 'Select Macro' list contains three items: 'Sedation Reminder', 'Updated Med History', and 'Sedation Reminder'. The 'Macro Description' section on the right contains the following text:

Your Dental Surgery appointment is scheduled for tomorrow morning at am. You have elected to have sedation during this visit; please remember to have someone drive you to and from your dental appointment. Please DO NOT eat or drink anything after 10:00 pm this evening. Small amounts of water are allowed until 2 hours before arriving at the office.

Please contact the office if you have any questions.

We are looking forward to seeing you tomorrow.

Smile Solutions Team

At the bottom of the dialog, there is a blue button labeled 'Add Note', which is circled in red. A red line extends from this button upwards to the 'Note' box at the top of the page.

Note: Editing the e-Sign URL manually may create faulty consent request.

At the bottom of the screen, there are four buttons: 'Add Consent Request', 'Add Notes Macro', 'Send', and 'Cancel'. The footer text reads: '© 2021 Planet DDS | Privacy Policy | Page Time Left (hh:mm:ss) 1:59:29'.

Step 8

Click **Send**.

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

Search Patient...

Email or Text Message

Patient: Adams, Aaron
(H) : BD : 4/19/1984
(C) : 949-401-6434 ID : 145
(W) :

Type Age/Sex: 36 / M
Responsible: Ada
Balance: 0.00 B
Est Ins: 0.00
Est Pat: 0.00

Email Text Message

Person Aaron Adams's Email
To Email Address * training@planetdds.com
Subject Surgery Reminder
Body

Source B I U S I_x x₂ x² Styles Normal Font Size A A

Good Afternoon Aaron,
Your Dental Surgery appointment is scheduled for tomorrow morning at 6:00 am. You have elected to have sedation during this visit; please remember to have someone drive anything after 10:00 pm this evening. Small amounts of water are allowed until 2 hours before arriving at the office.

Please contact the office if you have any questions.

We are looking forward to seeing you tomorrow.

body p

Note: Editing the e-Sign URL manually may create faulty consent request.

Add Consent Request Add Notes Macro **Send** Cancel

© 2021 Planet DDS | Privacy Policy | Page Time Left (hh:mm:ss) 1:58:33

A yellow bar will appear indicating that the email or text message has been sent successfully.

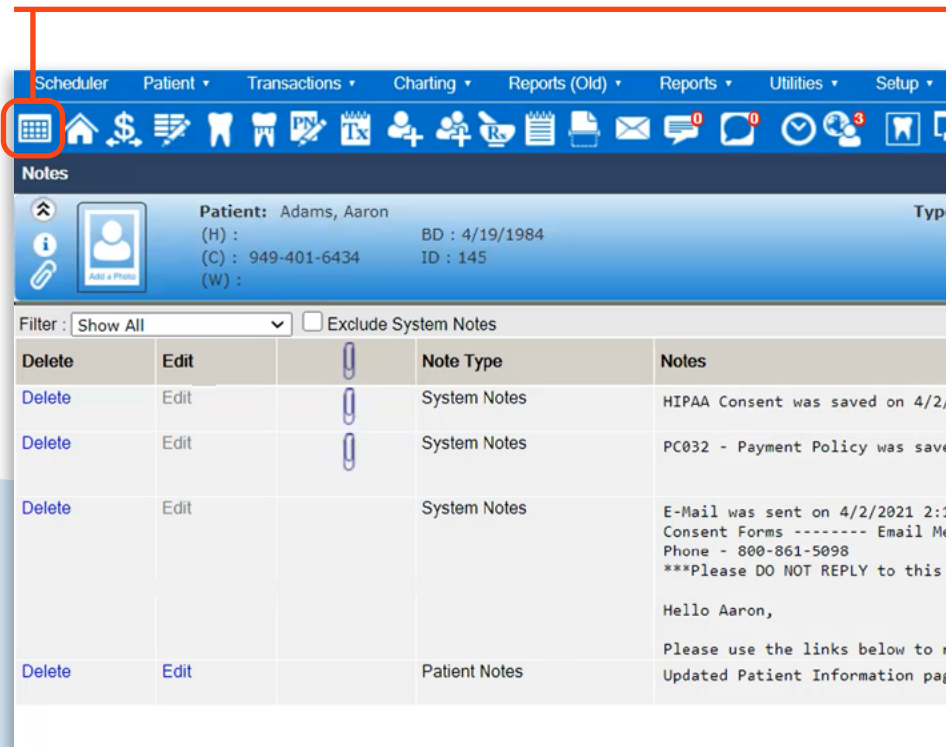
Note: Emails and texts are saved in the **Patient Notes** section. You can access them by clicking the **Patient Notes** icon in the toolbar.

Email or Text a Patient Using the Schedule

Step 1

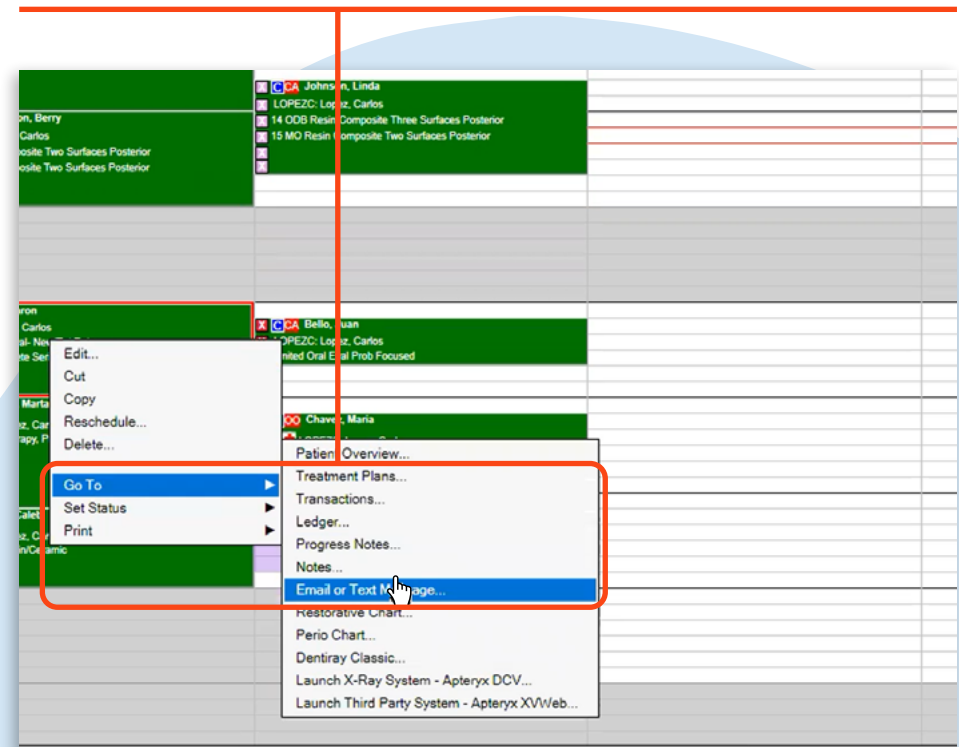
If a patient has an appointment booked, you can message them directly from the schedule.

Click the **Schedule** icon in the toolbar.



Step 2

Right-click the **patient's appointment** and hover over **Go To** which will open a drop down menu. Select **Email or Text Message**.



Step 3

Check either the **Email** or **Text Message** radio button.

Step 4

Type your message.

Note: You can add a Consent Request or Notes Macro as described in **Steps 4 to 8 in the previous section.**

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

Email or Text Message

Patient: Adams, Aaron
(H) : BD : 4/19/1984
(C) : 949-401-6434 ID : 145
(W) :

Type Age/Sex: 36 / M
First Visit:
Last Visit:

Email Text Message

Person Aaron Adams's Cell
To Phone Number * 949-401-6434
Message From - Smile Solutions

Note: Editing the e-Sign URL manually may create faulty consent request.

Add Consent Request Add Notes Macro Send Cancel

Step 5

Click **Send**.

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

Email or Text Message

Patient: Adams, Aaron
(H) : BD : 4/19/1984
(C) : 949-401-6434 ID : 145
(W) :

Type Age/Sex: 36 / M
First Visit:
Last Visit:

Email sent successfully

Email Text Message

Person Aaron Adams's Cell

To Phone Number * 949-401-6434

Message From - Smile Solutions
Aaron,

Note: Editing the e-Sign URL manually may create faulty consent request.

Add Consent Request Add Notes Macro **Send** Cancel

© 2021 Planet DDS | [Privacy Policy](#) | Page Time Left (hh:mm:ss) 1:59:31

A yellow bar will appear indicating that the email or text message has been sent successfully.