



Denticon - Basic Clerical

How to Schedule an Appointment

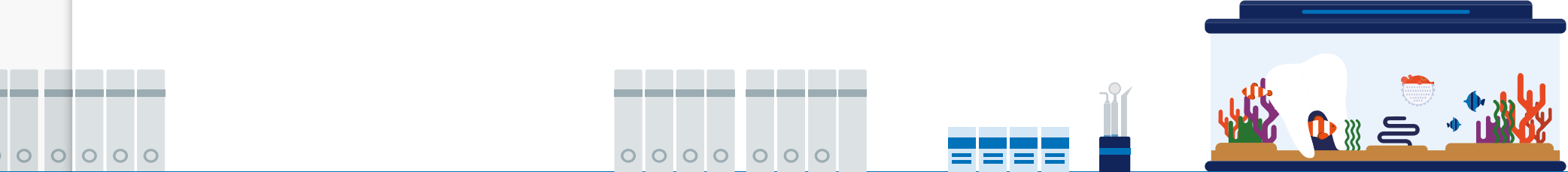


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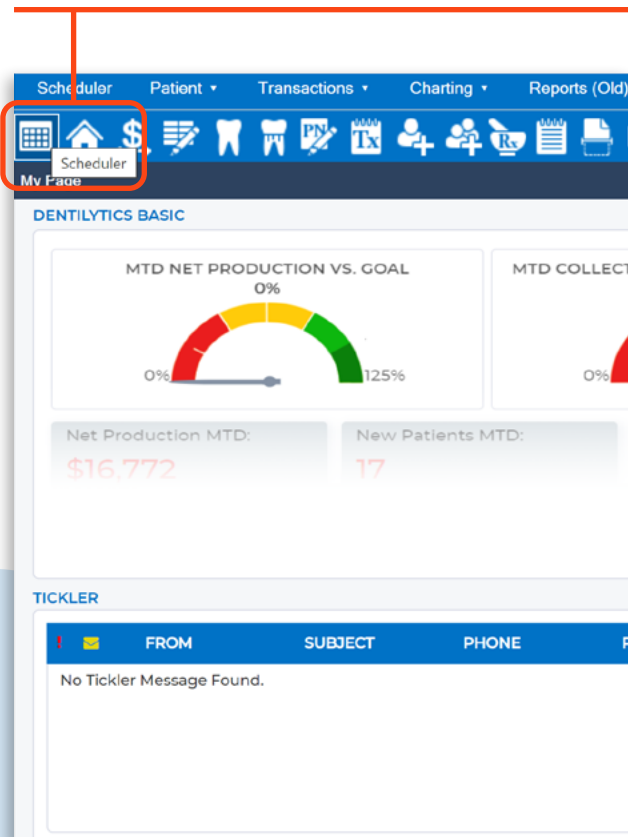
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Scheduling an Appointment on a Specific Day

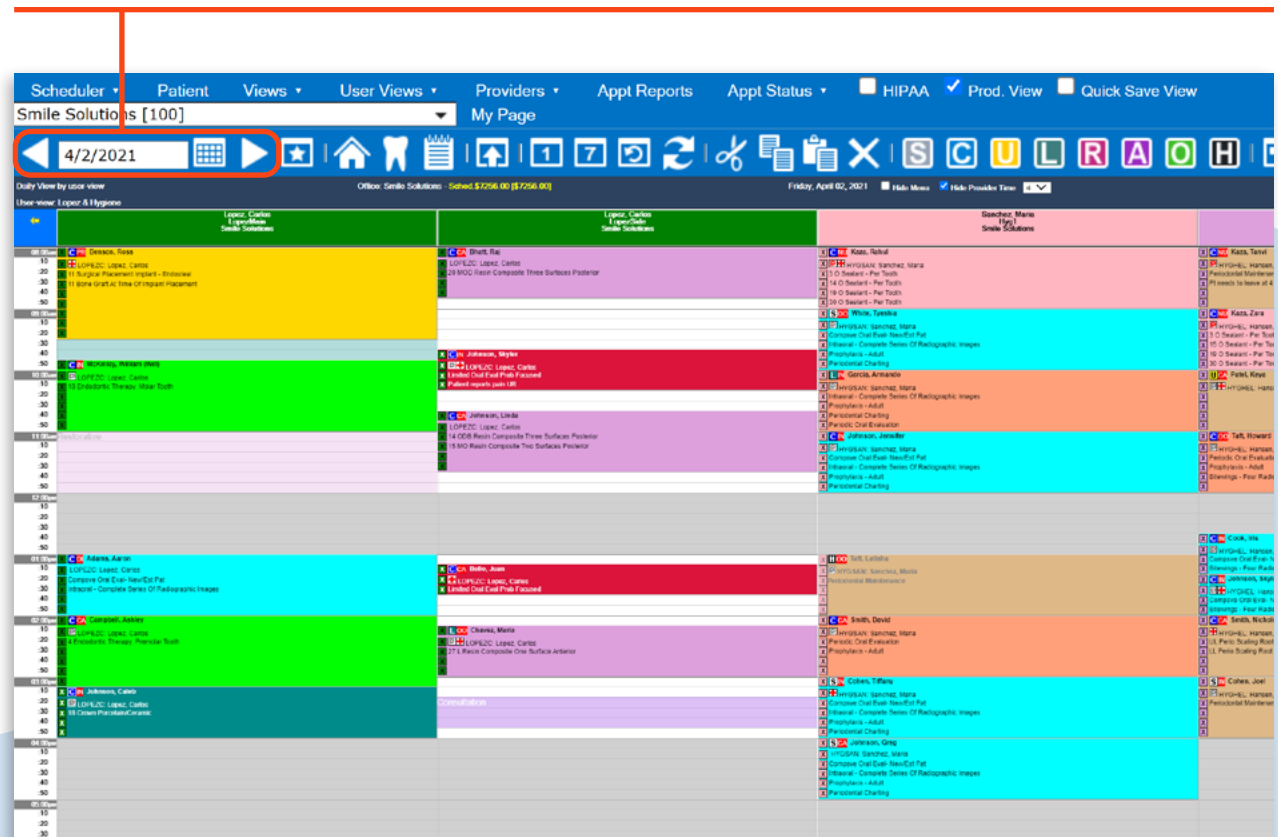
Step 1

Click the **Scheduler** icon in the toolbar.



Step 2

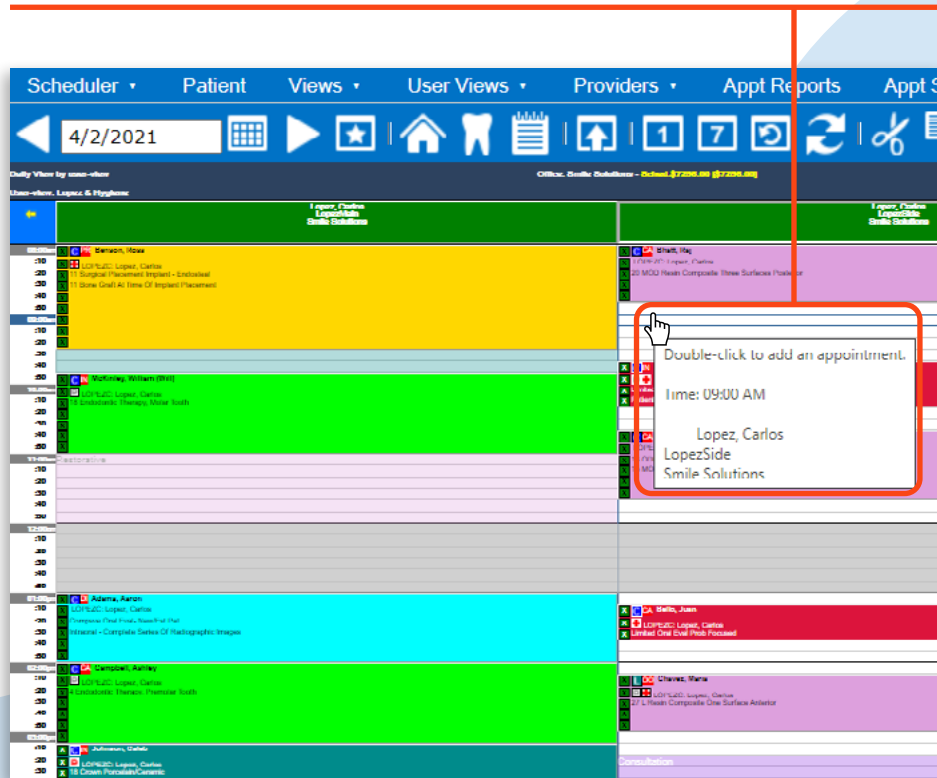
Use the **Calendar** icon to select the relevant date for the appointment.



Step 3

Right-click on the **timeslot** that you would like to use for the appointment.

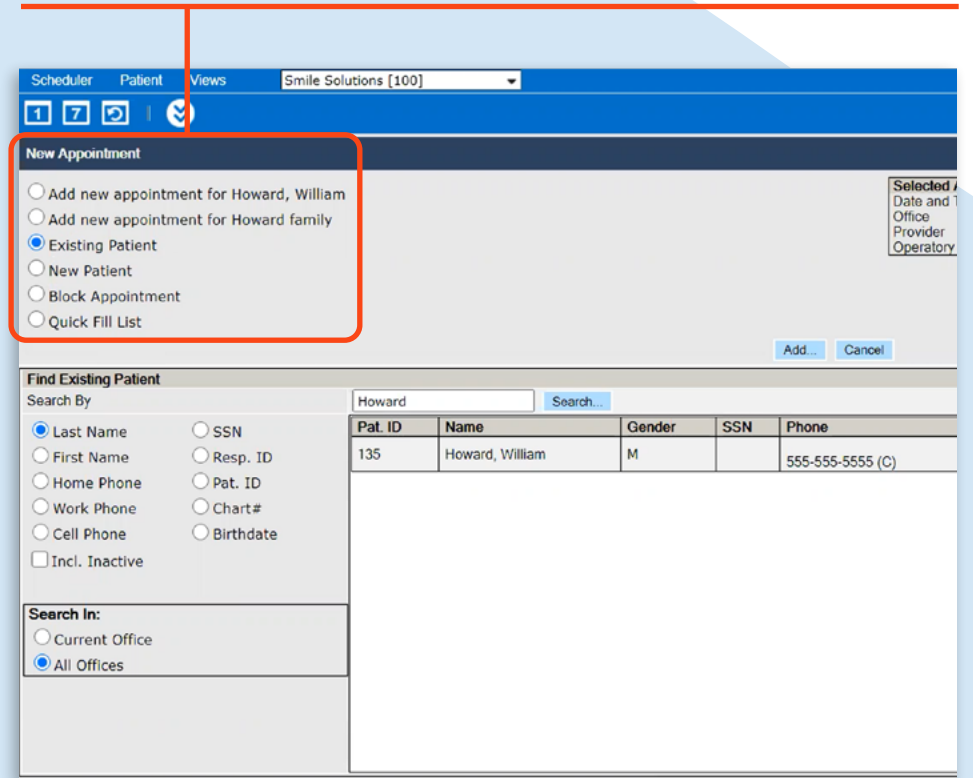
Note: The use of production types and colors can vary between offices. Timeslots on this particular Denticon schedule are color coded:
 White – Available,
 Gray – Unavailable,
 Pink – Emergency appointments
 Purple – Consultations



Step 4

Use the radio buttons to access the appropriate patient.

Note: The most recently visited patient records will show on screen for quick access.



Step 5

Use the 'Find Existing Patient' section to set the search parameters.

Step 6

Type the information (for example, the patient's last name) into the text box and click **Search**.

Step 7

Select the relevant patient and click **Add**.

The screenshot shows the 'New Appointment' section of the Denticon Scheduler. The 'Find Existing Patient' section is active, with search criteria set to 'Last Name' and 'All Offices'. The search input field contains 'john' and the 'Search...' button is highlighted. The search results table shows four patients, with 'Johnson, Skyler' (Pat. ID 121) selected. The 'Add...' button is also highlighted.

Find Existing Patient Search Criteria:

- Search By:
 - Last Name
 - First Name
 - Home Phone
 - Work Phone
 - Cell Phone
 - SSN
 - Resp. ID
 - Pat. ID
 - Chart#
 - Birthdate
- Incl. Inactive:
- Search In:
 - Current Office
 - All Offices

Search Results Table:

Pat. ID	Name	Gender	SSN	Phone	Birthdate	Age	Resp. ID	Chart#	Pat. Type	Office
118	Johnson, Brent	M		907-555-5556 (H) 907-555-5577 (W) 907-555-5555 (C)	9/10/1965	55	114			Smile Solutions
119	Johnson, Jennifer	F		907-555-5556 (H) 907-666-6666 (W) 907-555-5558 (C)	8/1/1975	45	114			Smile Solutions
138	Johnson, Linda	F		555-555-5555 (C)	7/20/1977	43	129			Smile Solutions
121	Johnson, Skyler	M		907-555-5556 (H) 907-555-5560 (C)	9/20/2008	12	114			Smile Solutions

Selected Appointment Slot Details:

- Date and Time: 02 Apr 2021 09:40 AM 0 mins.
- Office: Smile Solutions
- Provider: Lopez, Carlos
- Operatory: LopezSide

Buttons: Add... Cancel

Step 8

Use the fields on the 'Add/Edit Appointment' screen to input the details of the appointment.

Scheduler Patient Views

1 7 ↺ ↻

Add/Edit Appointment PGID :4363 / C

Patient: Johnson, Skyler
 (H) : 907-555-5556 BD : 9/20/2008
 (C) : 907-555-5560 ID : 121
 (W) :

Type

Age/Sex: 12 / M
Responsible: Johnson, Jennifer
 Balance: 0.00 BD : 8/1/1975
 Est Ins: 0.00
 Est Pat: 0.00

Prim. Ins: PRINCIPAL FINA
 800-247-4695 SubID : 4561
Sec. Ins:

Operator	LopezSide	Date	4/2/2021	<input type="checkbox"/> Lab	ABC Dental Lab	Prdr.	LOPEZC: Lopez, Carlos		
Status	Scheduled	Starts At	09:40 AM	Lab Cost	0.00	<input type="checkbox"/> Short Notice			
Prod. Type	Emergency	Duration	30	<input type="checkbox"/> Sent on		Mon	<input type="checkbox"/> AM <input type="checkbox"/> P		
<input type="checkbox"/> Missed <input type="checkbox"/> Cancelled		Patient Pref. Prdr.	LOPEZC: Lopez, Carlos	<input type="checkbox"/> Due on		Tue	<input type="checkbox"/> AM <input type="checkbox"/> P		
Notes	Campaign ID			<input type="checkbox"/> Recvd. on		Wed	<input type="checkbox"/> AM <input type="checkbox"/> P		
Patient reports pain UR			Hay Fever					Thu	<input type="checkbox"/> AM <input type="checkbox"/> P
								Fri	<input type="checkbox"/> AM <input type="checkbox"/> P

Treatments Quick Save Save Change Provider VBS Ins. Verification Close

Tx Plans Quick Add

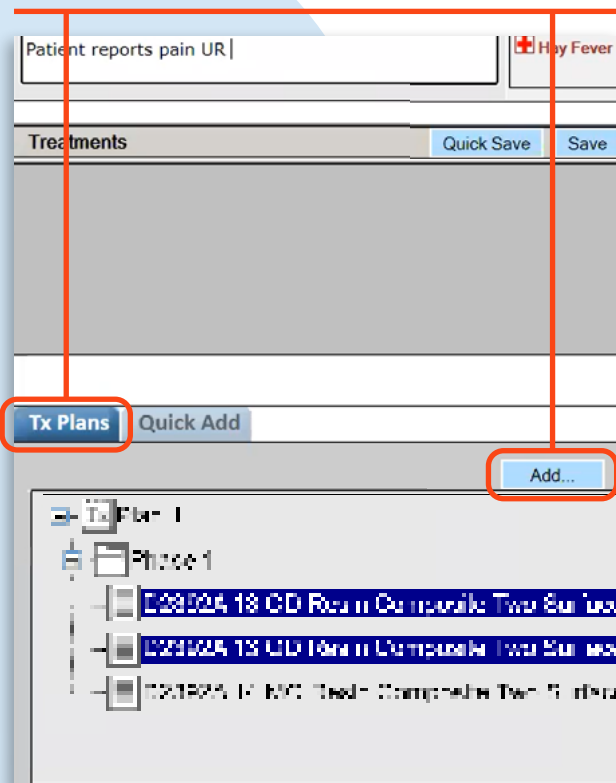
Add Proc By Category		Add Proc By		Procedures for <i>Diagnostics</i>		
Diagnostic	Preventive	Code		Code	User Code	Description
Restorative	Endodontics	<input type="text"/>	or	D0120		Periodic Oral Evaluation
				D0140		Limited Oral Eval Prob Focused
				D0145		Oral Eval Pt Under 3 Yrs, Counsel Primary
				D0150		Compsve Oral Eval- New/Est Pat

Step 9

Link procedure(s) to the patient's appointment. There are two ways to do this:

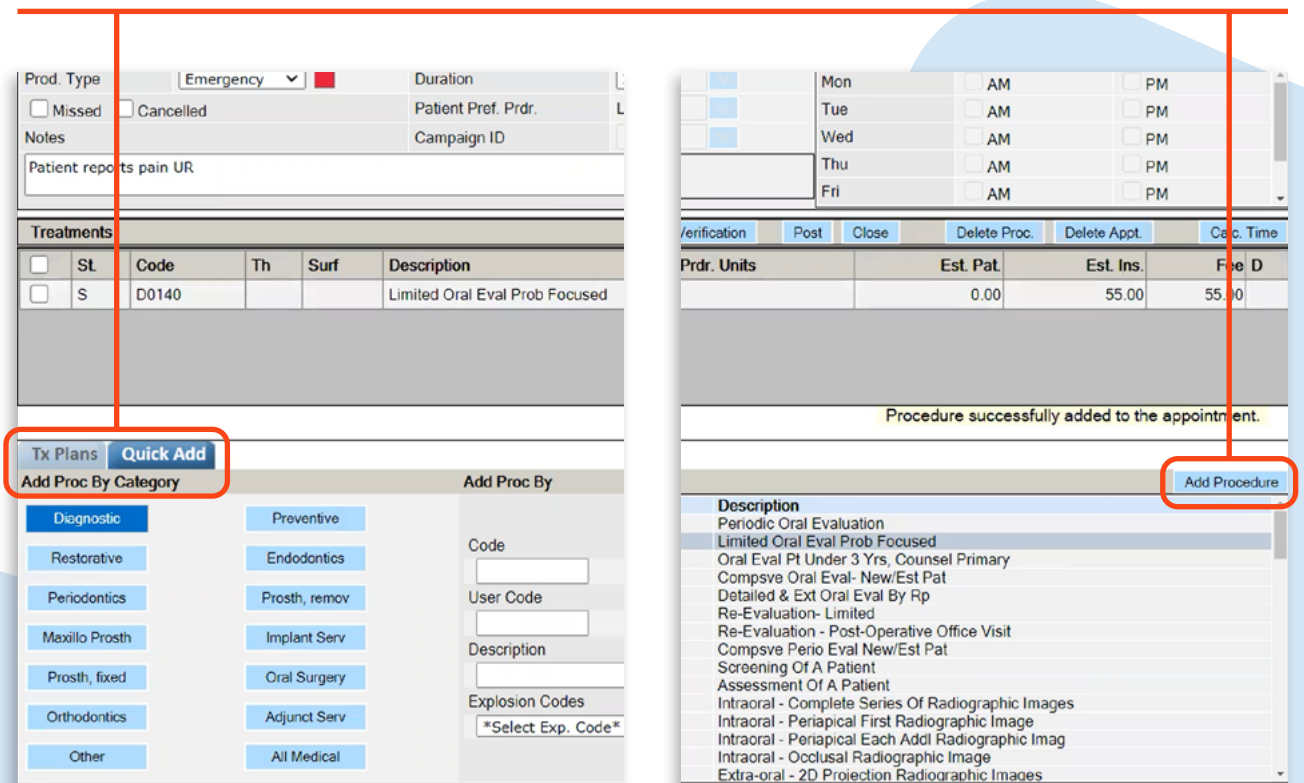
Option 1

Click **Tx Plans**, select a plan, then click **Add**.



Option 2

Click **Quick Add**, select a procedure, then click **Add Procedure**.



Step 10

Click **Save**.

The appointment has now been saved and is visible on the schedule.

Note: Clicking on the appointment will reveal further details.

Edit Appointment

Patient: Johnson, Skylene
(H) : 907-555-5556 BD : 9/20/2008
(C) : 907-555-5560 ID : 121
(W) :

Type: Emergency
Date: 4/2/2021
Starts At: 09:40 AM
Duration: 30

Procedure: D0140
Description: Limited Oral Eval Prob Focused

Buttons: Quick Save, Save

Scheduler | Patient | Views | User Views | Providers | Appt Reports | Appt Status

Smile Solutions [100] | My Page

4/2/2021

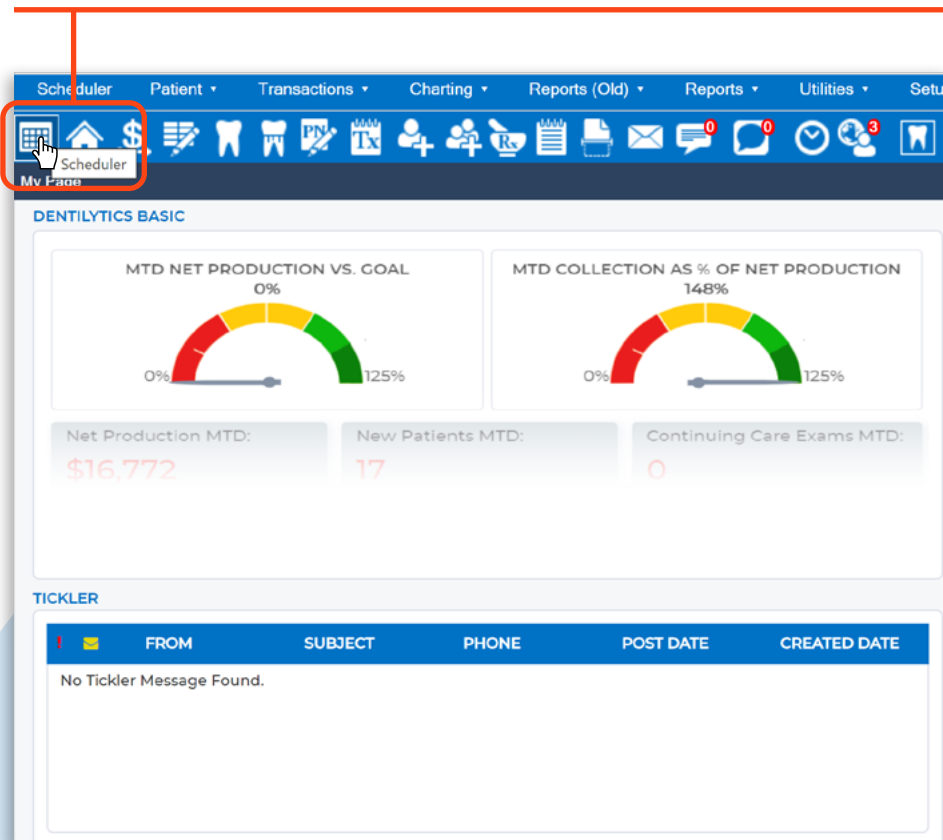
Office: Smile Solutions - Sched: \$7256.00 (\$7256.00) Friday, Apr 2, 2021

Time	Provider	Procedure
08:00-09:00	Lopez, Carlos	Smile Solutions
09:00-10:00	Benison, Rose	01 Bone Graft At Time Of Implant Placement
10:00-11:00	Lopez, Carlos	01 Endodontic Therapy, Non-Tech
11:00-12:00	Johnson, Skylene	01 Limited Oral Eval Prob Focused
12:00-01:00	Johnson, Linda	14 ODB Resin Composite Three Surfaces Posterior
01:00-02:00	Adams, Aaron	18 Crown Porcelain/Cosmetic
02:00-03:00	Johnson, Camo	18 Crown Porcelain/Cosmetic
03:00-04:00	Lopez, Carlos	27 L Resin Composite One Surface Anterior

Scheduling an Appointment in the Next Available Timeslot

Step 1

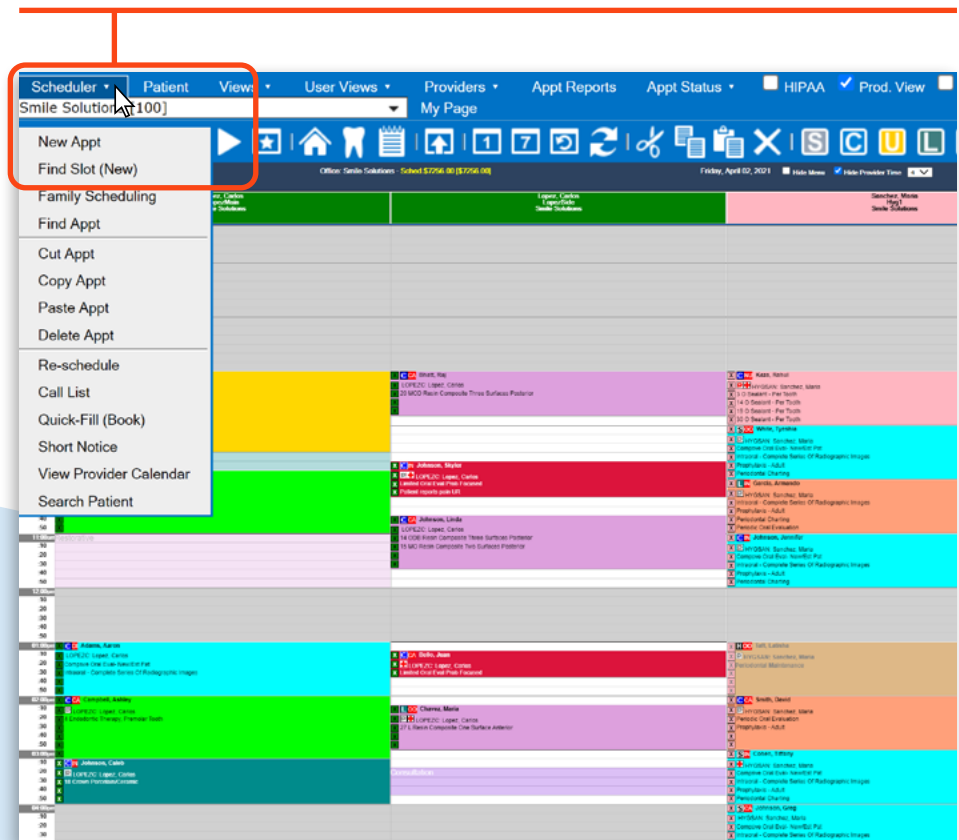
Click the **Scheduler** icon in the toolbar.



The screenshot shows the top toolbar of the Denticon software. The 'Scheduler' icon, which is a calendar icon, is highlighted with a red box. Below the toolbar, the 'DENTILYTICS BASIC' section displays two gauges: 'MTD NET PRODUCTION VS. GOAL' at 0% and 'MTD COLLECTION AS % OF NET PRODUCTION' at 148%. Below these are three summary cards: 'Net Production MTD: \$16,772', 'New Patients MTD: 17', and 'Continuing Care Exams MTD: 0'. The 'TICKLER' section below shows a table with columns 'FROM', 'SUBJECT', 'PHONE', 'POST DATE', and 'CREATED DATE', and a message 'No Tickler Message Found.'

Step 2

Click the **Scheduler** dropdown and select **Find Slot (New)**.

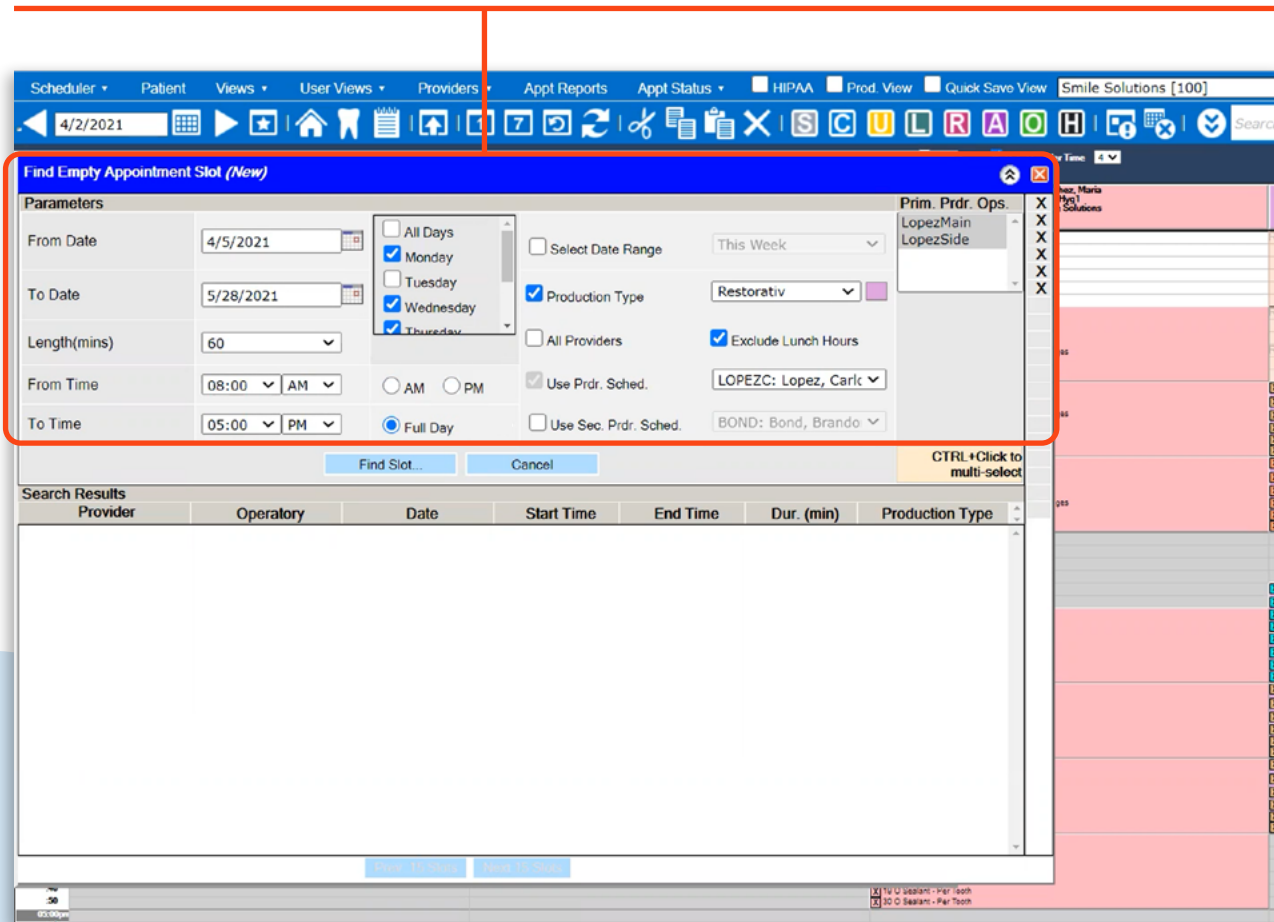


The screenshot shows the 'Scheduler' dropdown menu open. The 'Find Slot (New)' option is highlighted with a red box. The background shows a calendar view with various appointment slots and patient names.

Step 3

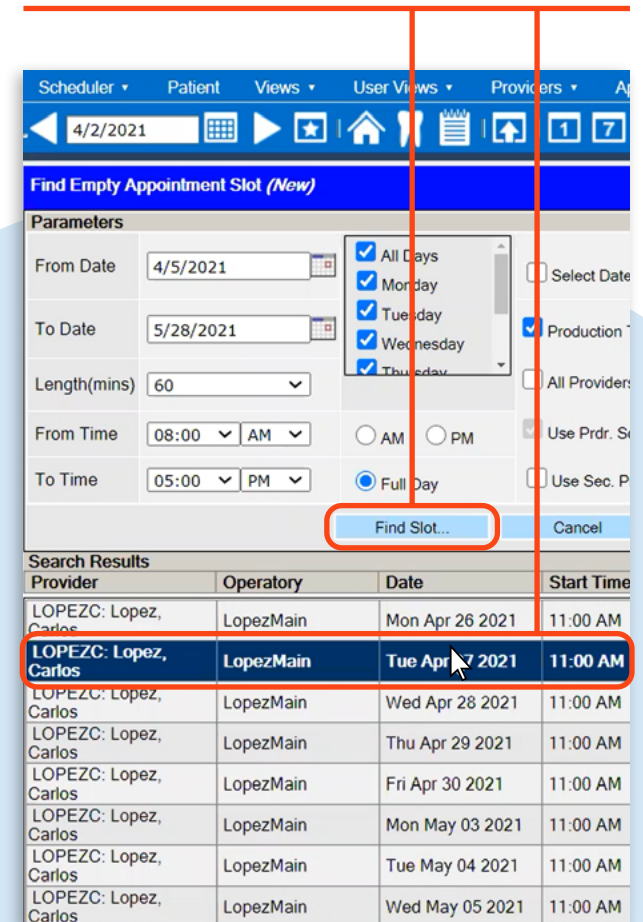
Set the parameters using the available fields.

Note: In the 'Prim. Prdr. Ops' section you can hold the **ctrl** key on the keyboard to select **multiple Operatories**.



Step 4

Click **Find Slot** and select an appropriate appointment from the list of search results.



Step 5

Search for the patient.

Step 6

Select the relevant patient and click **Add**.

The screenshot shows the 'New Appointment' section of the Denticon scheduler. On the left, there are radio buttons for appointment types: 'Add new appointment for Johnson, Skyler', 'Add new appointment for Johnson family', 'Existing Patient' (selected), 'New Patient', 'Block Appointment', and 'Quick Fill List'. A 'Selected Appointment Slot Details' box shows the date and time as '27 Apr 2021 11:00 AM 60 mins', the office as 'Smile Solutions', the provider as 'Lopez, Carlos', and the operator as 'LopezMain'. Below this is an 'Add...' button and a 'Cancel' button. The 'Find Existing Patient' section has a search input containing 'Watson' and a 'Search...' button. Below the search is a table of patients:

Pat. ID	Name	Gender	SSN	Phone	Birthdate	Age	Resp. ID	Chart#	Pat. Type	Office
144	Watson, Candi	F		555-555-5555 (H)	9/20/1969	51	116			Smile Solutions
124	Watson, Jeffrey	M		555-555-5555 (H) 555-555-6666 (W) 555-555-5556 (C)	8/20/1957	63	116			Smile Solutions

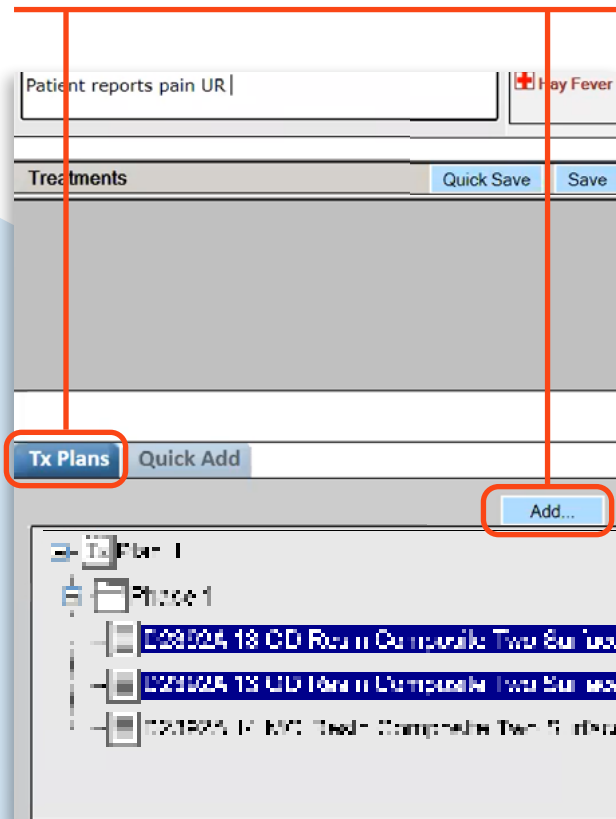
At the bottom of the page, there is a footer: © 2021 Planet DDS | [Privacy Policy](#) | Page Time Left (hh:mm:ss) 1:59:55

Step 7

Link procedure(s) to the patient's appointment. There are two ways to do this:

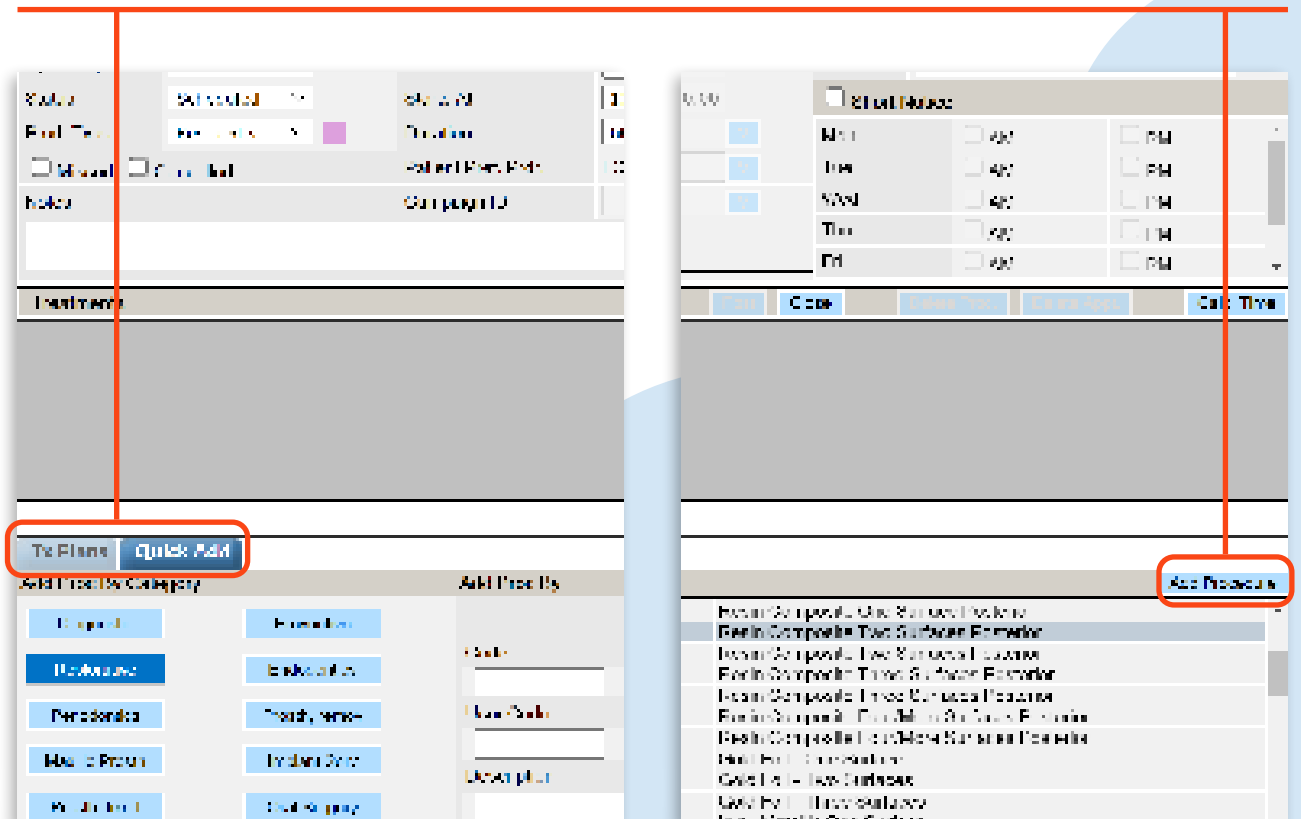
Option 1

Click **Tx Plans**, select a plan then click **Add**.



Option 2

Click **Quick Add**, select a procedure, then click **Add Procedure**.



Step 8

Ensure the appointment duration is appropriate for the treatment and click **Save**.

Add/Edit Appointment PGID :4363 / OID

Patient: Watson, Candi
(H) : 555-555-5555 BD : 9/20/1969
(C) : ID : 144
(W) :

Type Age/Sex: 51 / F
First Visit: 9/18/2020
Last Visit: 9/18/2020

Responsible: Watson, Jeffrey
Balance: 0.00 BD : 8/20/1957
Est Ins: 0.00
Est Pat: 0.00

Prim. Ins: MET LIFE
877-638-3379 SubID : 63
Sec. Ins:

Operatory: LopezMain Date: 5/12/2021
Status: Scheduled Starts At: 11:00 AM
Prod. Type: Restorativ
 Missed Cancelled

Notes

Duration: 10 (selected)
Patient Pref. Prdr.:
Campaign ID:

Lab: ABC Dental Lab Lab Cost: 0.00
 Sent on
 Due on
 Recd. on
 Metals Hay Fever

Prdr.: LOPEZC: Lopez, Carlos
 Short Notice
Mon AM PM
Tue AM PM
Wed AM PM
Thu AM PM
Fri AM PM

Quick Save **Save** Change Provider VBS Ins. Verification Post Close Delete Proc. Delete Appt.

	SL	Code	Th	Surf	Description	Bill	Dur.	Prdr.	Prdr. Units	Est. Pat.	Est. Ins.
<input type="checkbox"/>	S	D2392A	13	OD	Resin Composite Two Surfaces Posterior Diagnosed (LOPEZC: Lopez, Carlos)	D	0	LOPEZC		132.60	98.40
<input type="checkbox"/>	S	D2392A	14	MO	Resin Composite Two Surfaces Posterior Diagnosed (LOPEZC: Lopez, Carlos)	D	0	LOPEZC		92.60	138.40

Procedure successfully added to the appointment.

Tx Plans Quick Add

Add...

- Phase 1
 - D2392A 13 OD Resin Composite Two Surfaces Posterior Diagnosed (LOPEZC: Lopez, Carlos)
 - D2392A 14 MO Resin Composite Two Surfaces Posterior Diagnosed (LOPEZC: Lopez, Carlos)
- Phase 2
 - D2392A 14 Crown Porcelain/Ceramic Diagnosed (LOPEZC: Lopez, Carlos)

The appointment has now been saved and is visible on the schedule.

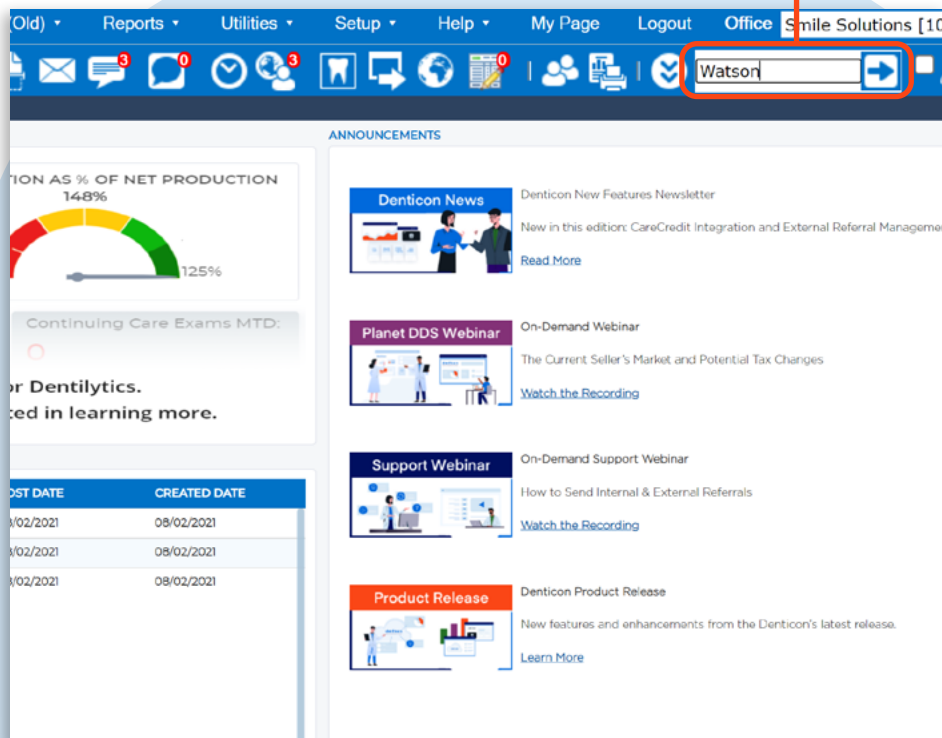
The screenshot displays the 'Daily View by user view' for the date 5/12/2021. The interface is organized into a grid where columns represent providers and rows represent time slots. The providers listed are Lopez, Carlos; Sanchez, Maria; and Hansen, Helena. The time slots range from 08:00 to 05:00. A red box highlights a new appointment for 'Watson, Diane' at 11:00 AM. The appointment details are as follows:

Time Slot	Provider	Appointment Details
11:00	Lopez, Carlos	Watson, Diane 13 00 Resin Composite Two Surfaces Posterior 14 00 Resin Composite Two Surfaces Posterior

Scheduling an Appointment From a Patient's Treatment Plan

Step 1

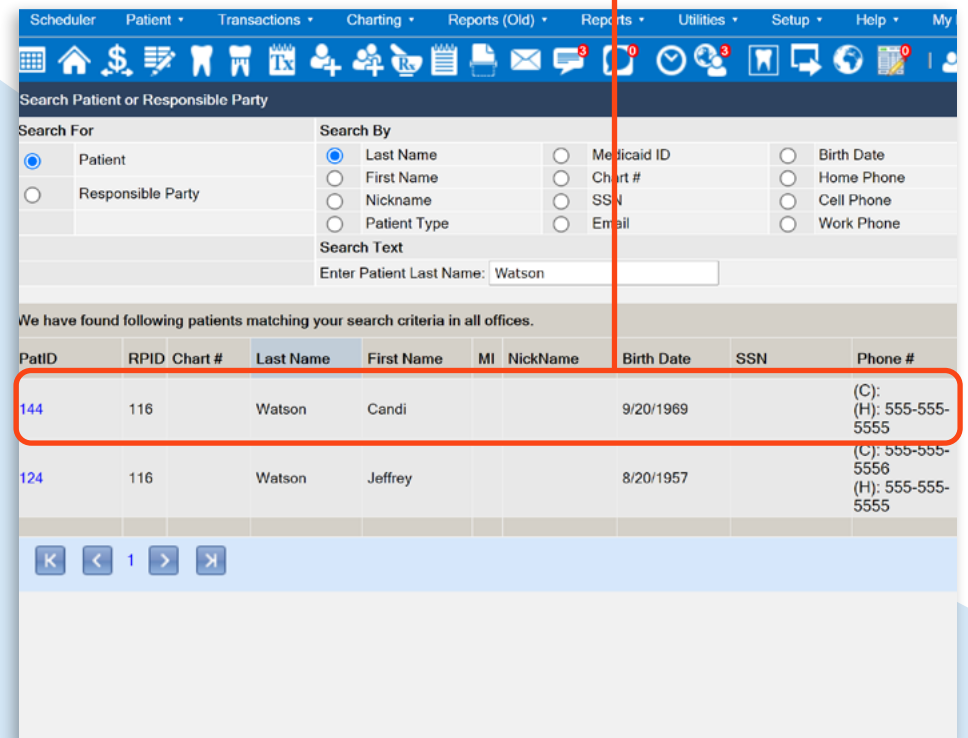
To locate a patient file, type their last name into the Search Patient field and click the **arrow**.



The screenshot shows the top navigation bar of the Denticon software. The 'Office' menu is open, and the 'Smile Solutions' option is selected. A search bar is visible with the text 'Watson' entered. A red box highlights the search bar and the search arrow button. Below the search bar, there are several announcement cards, including 'Denticon News', 'Planet DDS Webinar', 'Support Webinar', and 'Product Release'.

Step 2

Select the patient from the list.



The screenshot shows the search results page in the Denticon software. The search criteria are set to 'Patient' and 'Last Name'. The search text is 'Watson'. The results table shows two patients matching the criteria:

PatID	RPID	Chart #	Last Name	First Name	MI	NickName	Birth Date	SSN	Phone #
144		116	Watson	Candi			9/20/1969		(C): 555-555-5555 (H): 555-555-5555
124		116	Watson	Jeffrey			8/20/1957		(C): 555-555-5556 (H): 555-555-5555

A red box highlights the first patient entry (PatID 144, Candi Watson) in the table. The bottom of the screen shows a navigation bar with a page number '1' and navigation arrows.

Step 3

Click the **Treatment Plan Entry** icon in the toolbar.

The screenshot shows the top toolbar of the software. The 'Treatment Plan Entry' icon, which is a crown with a cross, is highlighted with a red rectangular box. Below the toolbar is the 'Patient Overview' section, which includes patient information, medical alerts, and appointment lists.

Step 4

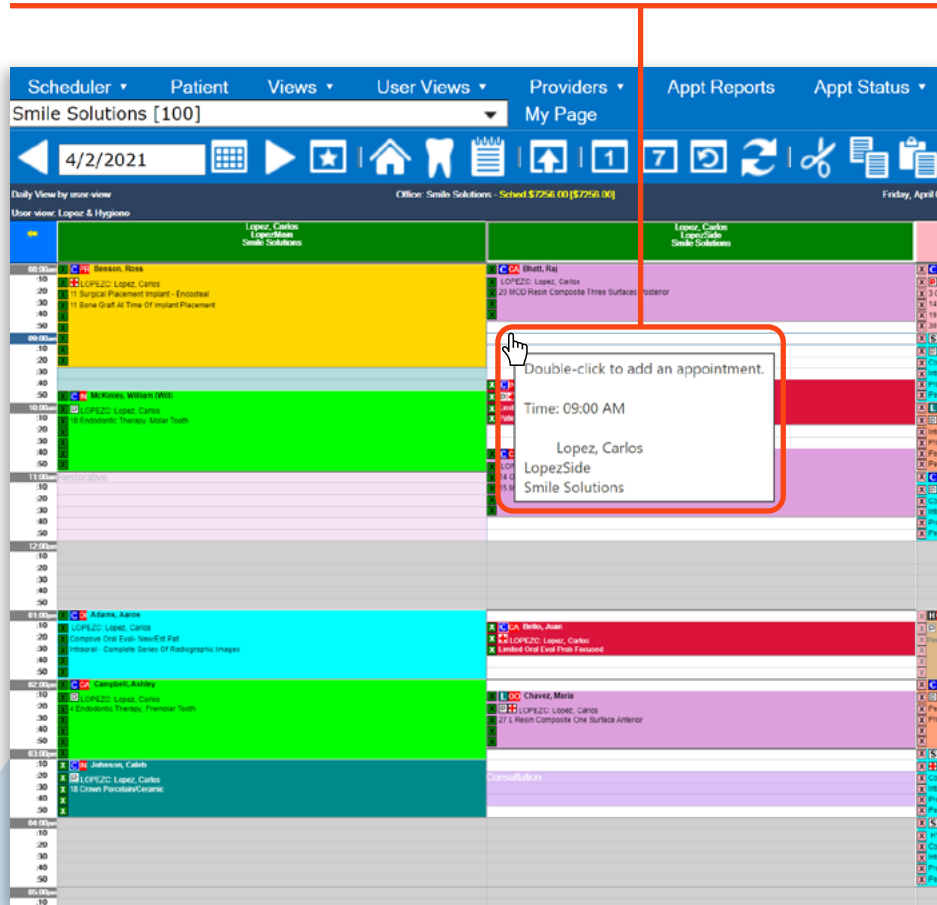
Select the relevant Treatment Plan item(s) and click **New Appt.**

The screenshot shows the 'Treatment Plan' interface for patient 'Watson, Candi'. A table of treatment items is displayed with columns for 'Diag Date', 'TID', 'PID', 'Ord Office', 'St', 'PS', 'S', 'C', 'Start Dt', 'End Dt', 'Code', 'Th Surf', 'N', and 'Description'. Two rows are selected, indicated by blue checkmarks in the first column. A red box highlights the 'New Appt.' button in the top right of the table area. Below the table, there are fields for 'Diagnosed Date', 'Tx Plan ID', 'Phase ID', and 'Order ID', along with buttons for 'Add Proc By Category' and 'Add Proc By'.

	Diag Date	TID	PID	Ord Office	St	PS	S	C	Start Dt	End Dt	Code	Th Surf	N	Description
<input type="checkbox"/>	4/1/2021	1	1	1 Bri	D		S				D2392A	13 OD		Resin Composite Tv
<input type="checkbox"/>	4/1/2021	1	1	1 Bri	D			S			D2392A	14 MO		Resin Composite Tv
<input checked="" type="checkbox"/>	4/1/2021	1	2	1 Bri	D						D2740	4		Crown Porcelain/Ce
<input checked="" type="checkbox"/>	4/1/2021	1	2	1 Bri	D						D2950	4		Core Buildup, Includ
<input type="checkbox"/>	4/1/2021	1	3	1 Bri	D						ZD0100	4		Deliver/Seat Crown

Step 5

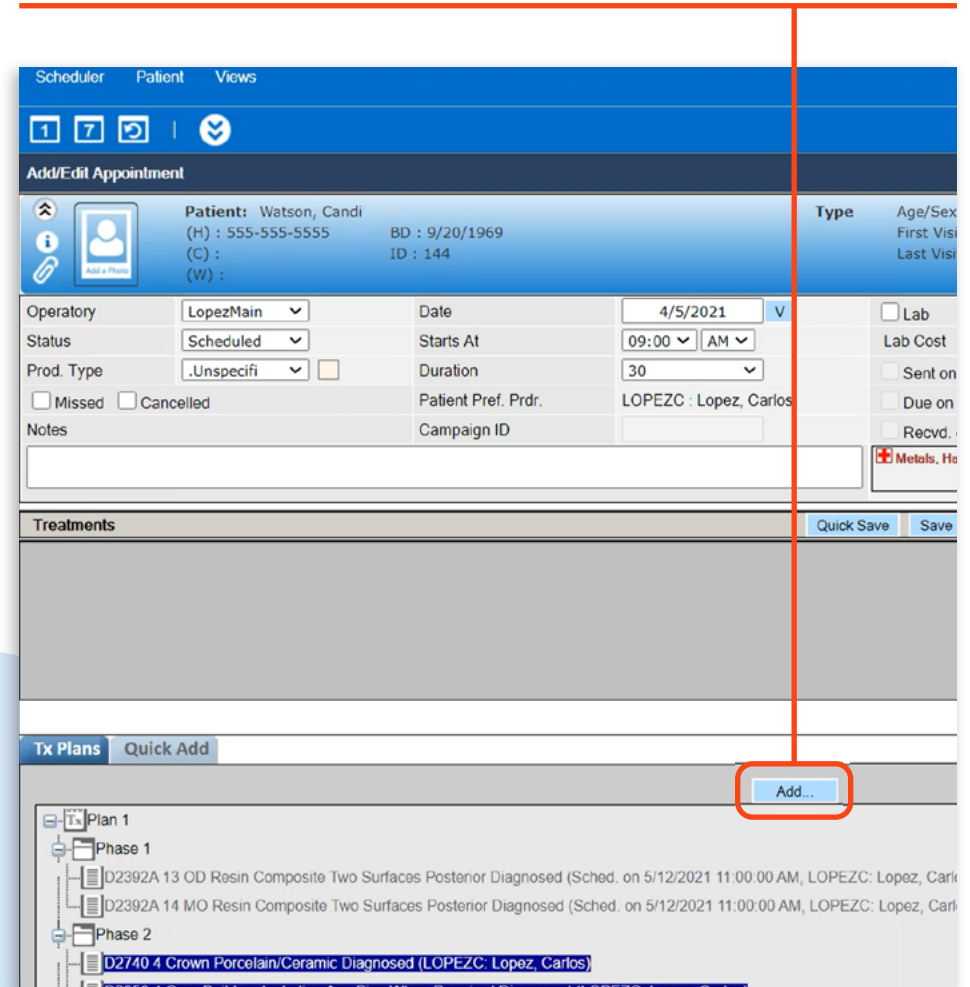
Right-click on the **timeslot** you would like to make the appointment for, then click **Add new appointment**.



Note: You may also use the Find Slot (New) method on Page 9.

Step 6

Select **Add** to link the selected treatment.



Step 7

Ensure the appointment duration is appropriate for the treatment, make any other amendments to the appointment details as required, and click **Save**.

The screenshot displays the 'Add/Edit Appointment' window in the Denticon software. The patient information for 'Watson, Candi' is visible, including contact details and insurance. The appointment is scheduled for 4/5/2021 at 09:00 AM. The operator is 'LopezMain' and the provider is 'LOPEZC: Lopez, Carlos'. The procedure type is 'Crown/Brid'. A dropdown menu for 'Duration' is open, showing options from 10 to 200 minutes, with '60' selected. The 'Save' button is highlighted with a red circle. Below the appointment details, a table lists treatments:

SL	Code	Th	Surf	Description	Bill	Dur.	Prdr.	Prdr. Units	Est. Pat.	Est. Ins.	Fee D
<input type="checkbox"/>	S	D2740	4	Crown Porcelain/Ceramic	D	0	LOPEZC		542.00	542.00	1084.00
<input type="checkbox"/>	S	D2950	4	Core Buildup, Including Any Pins When	D	0	LOPEZC		48.40	193.60	242.00

A message at the bottom of the window states: 'Procedure successfully added to the appointment.'

The appointment has now been saved and is visible on the schedule.

Scheduler Patient Views User Views Providers Appt Reports Appt Status HIPAA Prod. View Quick Save View

Smile Solutions [100] My Page

4/5/2021 Search Patient...

Office: Smile Solutions - Sched \$1326.00 (\$1326.00) Monday, April 05, 2021 PGD: 4363 / OID: 100

User-view: Lopez & Hygiene

Time	Lopez, Carlos Lopez/Smile Solutions	Lopez, Carlos Lopez/Smile Solutions	Sanchez, Maria Hycl/Smile Solutions	Hansen, Helena Hycl/Smile Solutions	Time
08:00am	Implants	Emergency		Recall/Recare	08:00am
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
09:00am	Walton, Diane	Emergency		Recall/Recare	09:00am
:10	LOPEZ, Lopez, Carlos				:10
:20	Crown Porcelain/Cosmetic				:20
:30	Core Buildup, Including Any Pins When Required				:30
:40					:40
:50					:50
10:00am		Restorative		Pero	10:00am
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
11:00am	Restorative			Recall/Recare	11:00am
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
12:00pm				Hygiene - Check	12:00pm
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
01:00pm	View Patient	Emergency		Hygiene - Check	01:00pm
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
02:00pm	Procedures	Emergency		Recall/Recare	02:00pm
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
03:00pm	Crown/Bridge	Consultation		Pero	03:00pm
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
04:00pm					04:00pm
:10					:10
:20					:20
:30					:30
:40					:40
:50					:50
05:00pm					05:00pm
:10					:10