



How to Clear Default Patient Data

PM Support Runbook

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RUNBOOK

How to Clear Default Patient Data

Clearing Stuck Default Patient Data — DentiMax Practice Management

Applies To
DentiMax Classic (All Versions)

Severity
Low

Est. Time
Under 5 Minutes

Audience
External

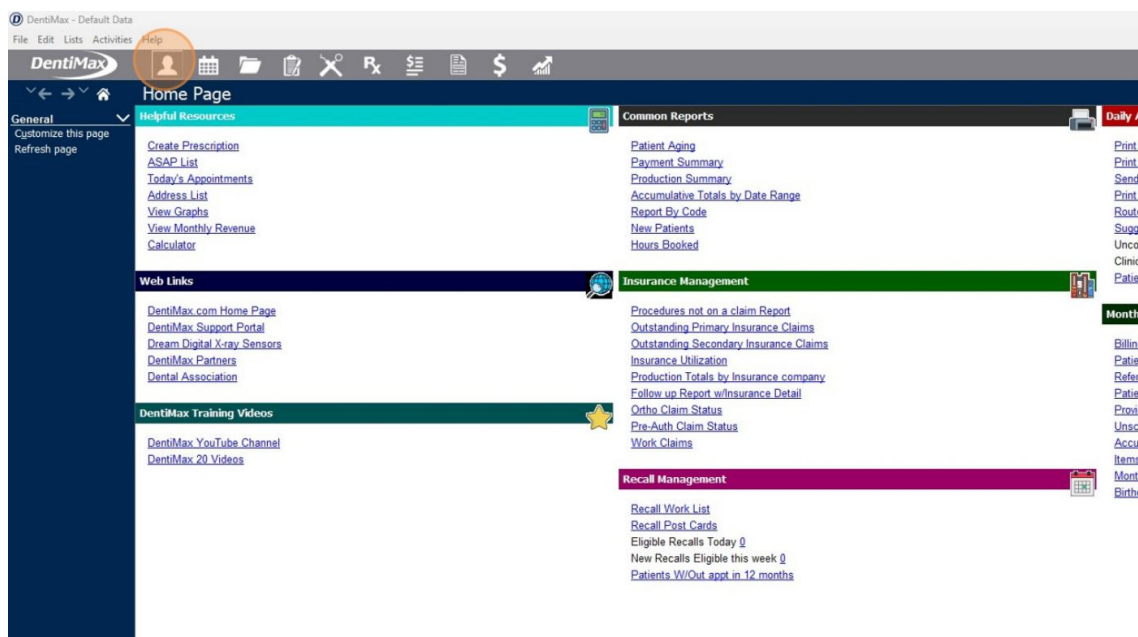
Overview

In DentiMax, you have the option to insert default data for all new patients created in the system. Often, however, offices will accidentally save one patient's data as default data. When this happens, anytime a new patient is created, the default data will automatically fill into the Patient Entry screen.

Procedure

Step 1 — Open the Patient List

- From the DentiMax Home Page, click the **Patient** icon in the toolbar to open the Patient List.



Step 2 — Trigger a New Patient Entry

- a. In the Patient List, click **New Patient** (F8) under **Modify Data**.

DentiMax - Default Data

File Edit Lists Activities Help

DentiMax

Patient List - Jeff LandShark

General

Close Screen

Customize View

Customize Filter

Modify Data

Edit Patient

Delete Patient

New Patient F8

Other Information

View Chart

View Perio Exams

View PSR Exams

View Ledger

View Treatment Esti...

View Prescriptions

Head of Household: [Dropdown] Assigned Provider: [Dropdown]

Last Name: [Dropdown] First Name: [Dropdown]

Default Primary Insurance: [Dropdown] Birth Date: [Dropdown]

Mobile: [Text]

Search: [Text] Search by: Chart Number View: Patient List

Chart Num...	Last Name	First Name	Language	Gender	Birth Date	Date Created	Preferred Contact Method	Mobile	E-mail	Default Primary Insurance	Preferre
LANE000	LandShark	Jeff		M	2/18/2000	2/18/2025 11:02 am				ME100	
TESTE000	Test	Dentimax	Creole	F	5/27/1990	8/4/2021 10:30 am		(555) 545-5454	test@gmail.com	AET00	
TESTE000	Test	Test		U	8/15/1996	10/3/2019 4:05 pm	Text			AME01	Evening

- b. The Patient Entry screen opens pre-filled with the incorrect default data (address, gender, birth date, recall settings, etc.).

Step 3 — Clear the Default Data

- a. In the left panel, under **Default Options**, click **Clear Default Data for New Patients**.

View Appointments

View Ledger

View Claims

View Prescriptions

New Prescription

Payment Plan

Exam Information

View Chart

View Perio Exams

New Perio Exam

View PSR Exams

Quick Prints

Print Patient Report

Print Mailing Label

Insurance Info

Check Eligibility

Default Options

Use this data for ne...

Clear Default Data f...

Head of ☒ Self

Household: LANE000 LandShark, Jeff

Street: 1451 N Test Dr Appts:

City: Mesa State: AZ Family:

Postal Code: 85209

Home Phone:

Work Phone:

Mobile Phone: Preferred Contact Method:

E-mail: Preferred Scheduling Hours:

Gender: Male SSI/SSN: 123-12-3123 Assigned Provider: TES00 Test

Marital Status: Married Driver License: Assigned Hygienist:

Birth Date: 2/18/2000 Other ID: 123-12-3123 Student Status:

Language: Employer:

☐ Use Recall Recall Every: 6 Months ☒ Plus 1 Day Facility:

Last Completed Recall: Group: Locator #:

Next Scheduled Recall: ☐ Manually Set Recall Date ☐ Do Not Bill Patient Billing Code:

Next Eligible Recall: Balance: Last Statement:

National Type:

- b. Click **Yes** on the confirmation prompt asking whether you want to clear the default data for new patients.

The screenshot shows a patient form in the DentiMax software. The form includes fields for patient information (Name, Address, City, State, Zip, Phone, Email), demographic information (Gender, Date of Birth, Marital Status, Driver License, Other ID), and medical information (Assigned Provider, Assigned Hygienist, Student Status, Employer, Facility, Group, Do Not Bill Patient, Balance, Last Statement). A confirmation dialog box is overlaid on the form, asking: "This will clear the default information automatically entered as a default for all new patients. Do you want to clear the default data for any new patients?". The "Yes" button is highlighted with an orange circle.

- c. Click **OK** on the confirmation that all new patient default information has been cleared.

The screenshot shows the same patient form as in the previous image. A confirmation dialog box is overlaid on the form, asking: "All new patient default information is cleared.". The "OK" button is highlighted with an orange circle.

Step 4 — Close Out the Test Entry

- Click **Cancel Changes** to close the screen without saving this pre-filled entry.

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DentiMax

Patient Information - LandShark, Jeff

General | Patient Information | Insurance Information | Medical Alerts | Extra Info | Custom | Missing Teeth

Chart Number: LANDE000 ☐ Deceased ☐ VIP ☐ Not a Patient ☐ Inactive

Last Name: LandShark Middle Initial: T Notes:
 First Name: Jeff Alerts:
 Nickname:
 Head of Household: ☒ Self
 Household: LANDE000 LandShark, Jeff
 Street: 1451 N Test Dr
 Street 2:
 City: Mesa State: AZ Family:
 Postal Code: 85209
 Home Phone:
 Work Phone:
 Mobile Phone:
 E-mail:
 Preferred Contact Method:
 Preferred Scheduling Hours:
 Eligibility Expired
 No Lab Orders

Gender: Male SBI/SSN: 123-12-3123 Assigned Provider: TES00 Test
 Marital Status: Married Driver License:
 Birth Date: 2/18/2000 Other ID: 123-12-3123
 Language:
 Student Status:
 Employer:
 Facility:
 Group:
 Locator #:
 Do Not Bill Patient
 Balance:
 Last Statement:
 ☐ Use Recall
 Recall Every: 6 Months ☒ Plus 1 Day
 Last Completed Recall:
 Next Scheduled Recall:
 Next Eligible Recall:
 ☐ Manually Set Recall Date
 National Type:

Save Changes
 Cancel Changes
 Add a new family m...
 Load Patient Picture
 Acquire Patient Pict...
 More Information
 View Appointments
 View Ledger
 View Claims
 View Prescriptions
 New Prescription
 Payment Plan
 Exam Information
 View Chart
 View Perio Exams
 New Perio Exam
 View PSR Exams
 Quick Prints
 Print Patient Report
 Print Mailing Label
 Insurance Info
 Check Eligibility
 Default Options
 Use this data for ne...

Step 5 — Verify the Fix

- Click **New Patient** (F8) again to open a new, blank Patient Entry screen.
- Confirm the Patient Entry screen is now blank, with no default data pre-filled.

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information -

General | Patient Information | Insurance Information | Medical Alerts | Extra Info | Custom | Missing Teeth

Chart Number:
 ☐ Deceased ☐ VIP ☐ Not a Patient ☐ Inactive

Last Name: Middle Initial: Notes:
 First Name: Alerts:
 Nickname:
 Head of Household: ☒ Self
 Household:
 Street:
 Street 2:
 City: State: Family:
 Postal Code:
 Home Phone:
 Work Phone:
 Mobile Phone:
 E-mail:
 Preferred Contact Method:
 Preferred Scheduling Hours:
 Eligibility Expired
 No Lab Orders

Gender: SBI/SSN: Assigned Provider: TES00 Test
 Marital Status: Driver License:
 Birth Date: Other ID:
 Language:
 Student Status:
 Employer:
 Facility:
 Group:
 Locator #:
 Do Not Bill Patient
 Balance:
 Last Statement:
 ☐ Use Recall
 Recall Every: 6 Months ☒ Plus 1 Day
 Last Completed Recall:
 Next Scheduled Recall:
 Next Eligible Recall:
 ☐ Manually Set Recall Date
 National Type:

Save Changes
 Cancel Changes
 Add a new family m...
 Load Patient Picture
 Acquire Patient Pict...
 More Information
 View Appointments
 View Ledger
 View Claims
 View Prescriptions
 New Prescription
 Payment Plan
 Exam Information
 View Chart
 View Perio Exams
 New Perio Exam
 View PSR Exams
 Quick Prints
 Print Patient Report
 Print Mailing Label
 Insurance Info
 Check Eligibility
 Default Options
 Use this data for ne...

Additional Troubleshooting

Symptom	Resolution
Create Patient File fails with a blank error message when converting an appointment into a new patient.	Default patient data is likely stuck on the system, blocking the save. Follow the Procedure above (Steps 1–5) to clear the default data, then try Create Patient File again.

For issues not covered by this runbook, contact **DentiMax Practice Management Support** at **1 (800) 704-8494 Ext. 805** or **Support@DentiMax.com**.