

How to Add and Edit a Client Note

Learn how to add a new client note, edit existing entries, and ensure your changes are saved correctly. This guide will walk you through the process step-by-step to manage client information effectively.

1 View patient chart

The screenshot displays the 'Patient Information - Chicken, Rubber' interface in the DentiMax software. The interface is divided into several sections:

- General:** Contains options like 'Save Changes', 'Cancel Changes', 'Add a new family member', 'Load Patient Picture', and 'Acquire Patient Picture'.
- More Information:** Includes 'View Appointments', 'View Ledger', 'View Claims', 'Prescriptions', 'View Old Prescriptions', 'Payment Plan', 'Recall Details', and 'Manage Allergies'.
- Exam Information:** This section is highlighted with an orange circle and includes 'View Chart', 'View Perio Exams', 'New Perio Exam', and 'View PSR Exams'.
- Quick Prints:** Offers 'Print Patient Report' and 'Print Mailing Label'.
- Insurance Info:** Features 'Check Eligibility' and 'Use Recall' options.
- Default Options:** Includes 'Use this data for new patients' and 'Clear Default Data'.

The main content area shows patient details for 'Chicken, Rubber' with a chart number of CHIRU000. Fields include Last Name (Chicken), First Name (Rubber), Middle Initial, Nickname, Head of Household (Self), Household (CHIRU000), Street, Street 2, City (Gilbert), State (AZ), Postal Code (85209), Home Phone, Work Phone, Mobile Phone, E-mail, Gender (Male), Marital Status, Birth Date (10/16/1998), Age (27yrs), Language, and SIN/SSN. It also lists Assigned Provider (KOKKIRALA, RAJESHWERRAO), Assigned Hygienist, Student Status, Employer, Facility, Group, and Locator #. Financial information shows a balance of 150.00 and a last statement date.

2

If you want your Alerts to be visible while writing your clinical notes: Click on the Alert tab in the charting section

The screenshot shows a dental software interface for a patient named 'Chicken, Rubber (CHIRU000) - 10/16/1998 27yrs'. The charting section displays a grid of teeth with various icons and a circled 'Alerts' tab. The clinical notes section on the right contains text such as 'New Patient Exam', 'Medical History Reviewed with patient', and 'Chief Complaint: aswd'. The 'Alerts' tab is highlighted with an orange circle, and the 'Add Note...' button in the clinical notes section is also highlighted with an orange circle.

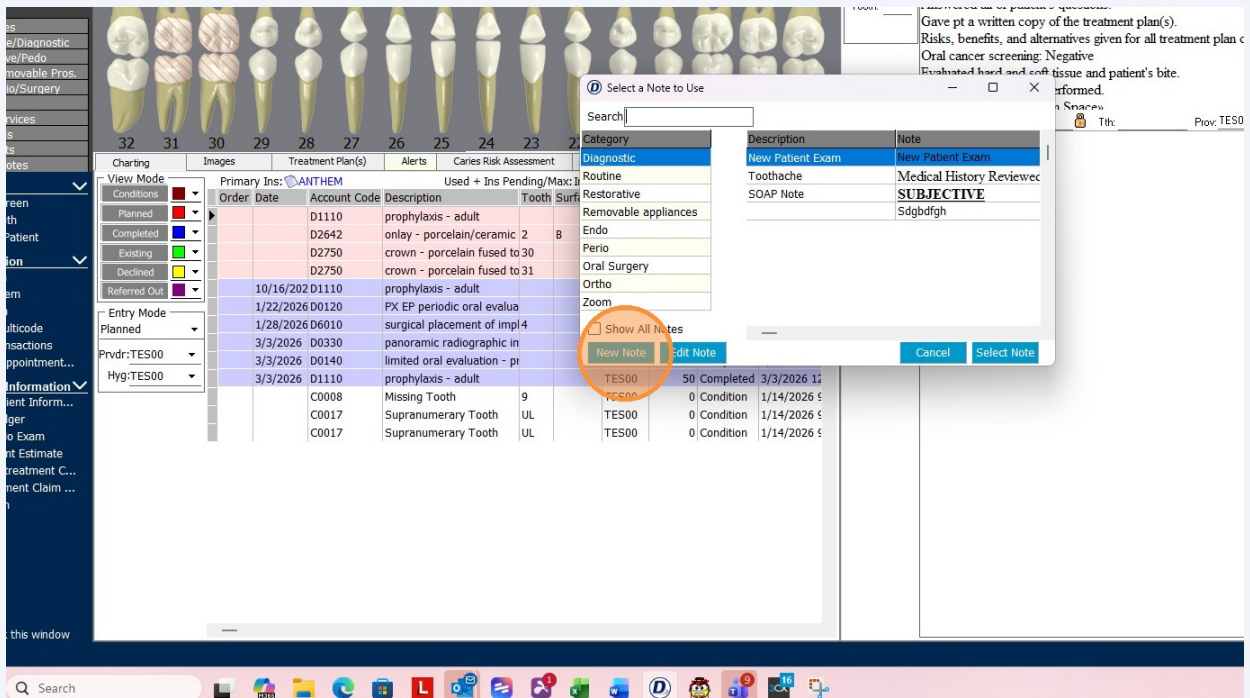
3

In order to use a template note: Click "Add Note"

The screenshot shows the same dental software interface as above. The charting section displays a grid of teeth with various icons and a circled 'Add Note' button. The clinical notes section on the right contains text such as 'New Patient Exam', 'Medical History Reviewed with patient', and 'Chief Complaint: aswd'. The 'Add Note' button is highlighted with an orange circle, and the 'Add Note...' button in the clinical notes section is also highlighted with an orange circle.

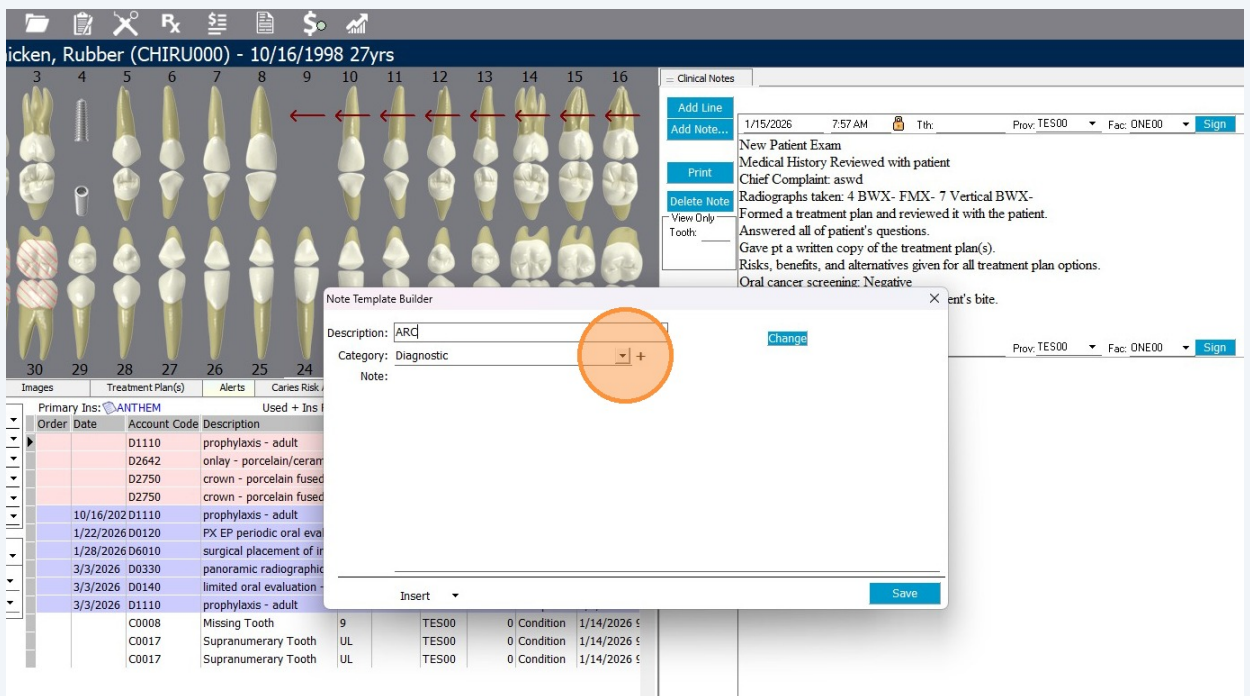
4

If you need to create a new "Template" to have available to use with all patients:
Click "New Note"



5

Enter Description



6 Select the Category you want the "Template" to be located

The screenshot shows a dental software interface with a patient chart for 'Chicken, Rubber (CHIRU000) - 10/16/1998 27yrs'. The chart displays a dental arch with teeth numbered 1-16 and 32-24. A 'Note Template Builder' dialog is open, showing the following details:

- Description: ARC
- Category: Diagnostic (highlighted with an orange circle)
- Note: Restorative, Diagnostic, Routine, Removable appliances, Endo, Perio, Oral Surgery, Zoom

The background shows a 'Clinical Notes' section with a note dated 1/15/2026 at 7:57 AM. The note text includes: 'New Patient Exam', 'Medical History Reviewed with patient', 'Chief Complaint: aswd', 'Radiographs taken: 4 BWX- FMX- 7 Vertical BWX-', 'Formed a treatment plan and reviewed it with the patient', 'Answered all of patient's questions.', 'Gave pt a written copy of the treatment plan(s).', 'Risks, benefits, and alternatives given for all treatment pla', and 'Oral cancer screening: Negative'.

7 Click in the note section: enter the note you want available to use with all patients

The screenshot shows the same dental software interface as in step 6. The 'Note Template Builder' dialog is open, and the 'Category' dropdown is now set to 'Routine' (highlighted with an orange circle). The 'Note' field is empty.

The background 'Clinical Notes' section shows the same note as in step 6, with the text: 'New Patient Exam', 'Medical History Reviewed with patient', 'Chief Complaint: aswd', 'Radiographs taken: 4 BWX- FMX- 7 Vertical BWX-', 'Formed a treatment plan and reviewed it with the patient', 'Answered all of patient's questions.', 'Gave pt a written copy of the treatment plan(s).', 'Risks, benefits, and alternatives given for all treatment pla', and 'Oral cancer screening: Negative'.

8 Click "Save"

Chief Complaint: aswd
 Radiographs taken: 4 BWX- FMX- 7 Vertical BWX-
 Formed a treatment plan and reviewed it with the patient.
 Answered all of patient's questions.
 Gave pt a written copy of the treatment plan(s).
 Risks, benefits, and alternatives given for all treatment plan options.
 Oral cancer screening: Negative

Prov: TES00 Fac: ONE00 Sign

Note Template Builder

Description: ARC

Category: Routine

Note: Alta Regional Client

Diagnosis:
 Behavior:

Save

9 Now you will see the new Template in the category you selected to use

1/15/2026 7:57 AM Tth Prov: TES00 Fac: ONE00 Sign

New Patient Exam
 Medical History Reviewed with patient
 Chief Complaint: aswd
 Radiographs taken: 4 BWX- FMX- 7 Vertical BWX-
 Formed a treatment plan and reviewed it with the patient.
 Answered all of patient's questions.
 Gave pt a written copy of the treatment plan(s).
 Risks, benefits, and alternatives given for all treatment plan options.
 Oral cancer screening: Negative
 Evaluated hard and soft tissue and patient's bite.

Prov: TES00 Fac: ONE00 Sign

Select a Note to Use

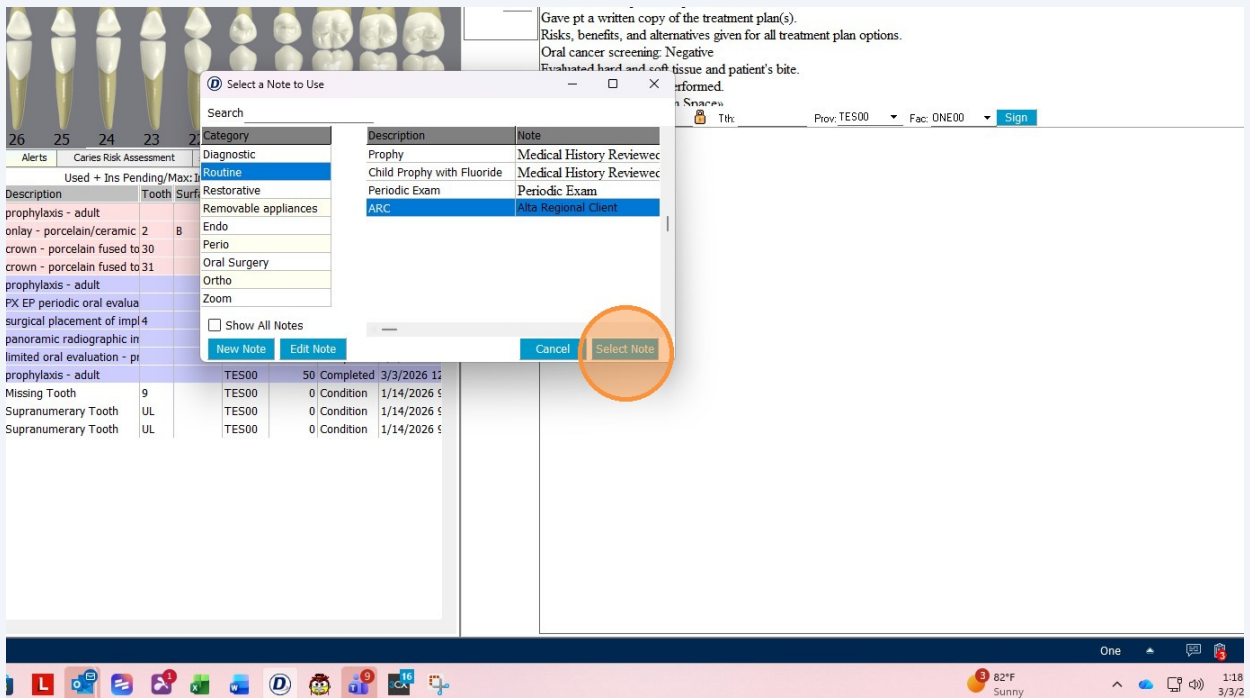
Category	Description	Note
Diagnostic		
Routine	Prophy	Medical History Reviewec
Restorative	Child Prophy with Fluoride	Medical History Reviewec
Removable appliances	Periodic Exam	Periodic Exam
Endo	ARC	Alta Regional Client
Perio		
Oral Surgery		
Ortho		
Zoom		

Show All Notes

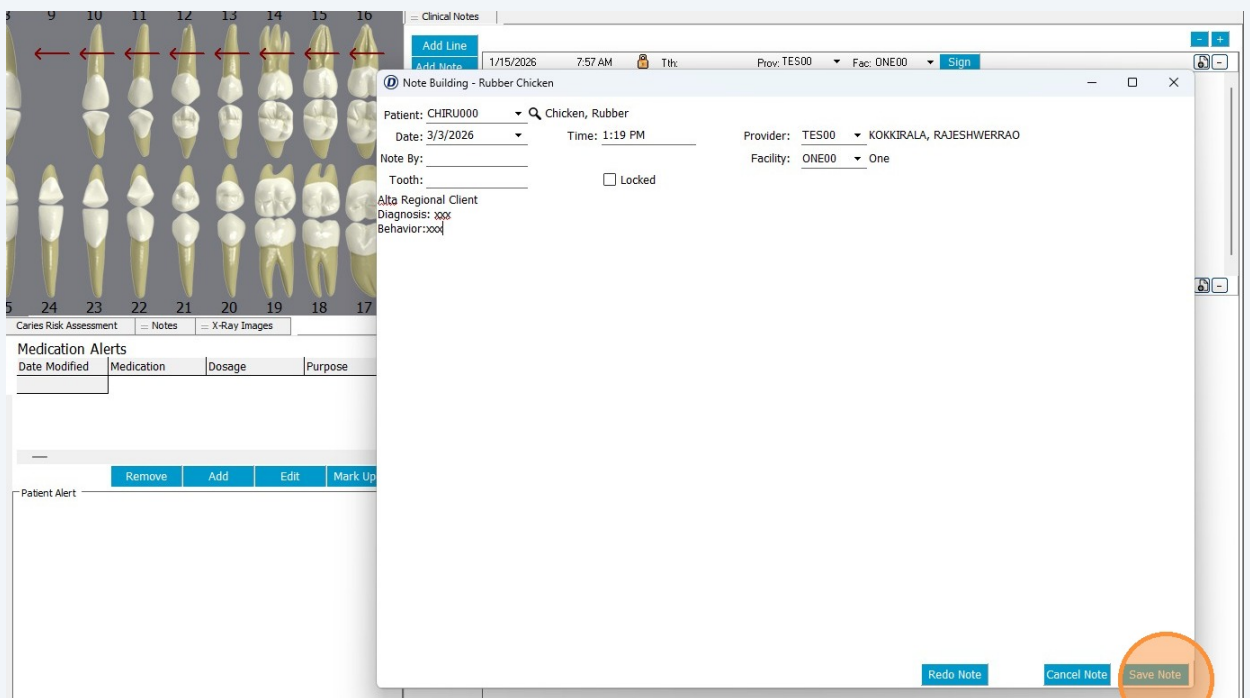
New Note Edit Note Cancel Select Note

Date	Account Code	Description	Used + Ins Pending/Max:	Tooth	Surf
10/16/202	D1110	prophylaxis - adult			
1/22/2026	D0120	PX EP periodic oral evalua			
1/28/2026	D6010	surgical placement of impl4			
3/3/2026	D0330	panoramic radiographic in			
3/3/2026	D0140	limited oral evaluation - pr			
3/3/2026	D1110	prophylaxis - adult			
	C0008	Missing Tooth	9		
	C0017	Supranumerary Tooth	UL		
	C0017	Supranumerary Tooth	UL		

10 To use this template: Select the Template and click Select Note



11 Enter all necessary details to the Template and Save note



12 This note will now be a part of the legal clinical notes.

This note will be available to use for electronic attachments.

