

Scribe for windows Workflow

1 To create a NEW PATIENT account; Click on the "Patient List" icon

The screenshot shows the DentiMax Home Page. The top navigation bar includes a 'Patient List' icon circled in orange. The main content area is divided into several sections: 'Helpful Resources' with links like 'Create Prescription' and 'ASAP List'; 'Common Reports' with links like 'Patient Aging' and 'Payment Summary'; 'Web Links' with links to 'DentiMax.com Home Page' and 'DentiMax Support Portal'; 'Insurance Management' with links like 'Procedures not on a claim Report' and 'Outstanding Primary Insurance Claims'; and 'Recall Management' with links like 'Recall Work List' and 'Recall Post Cards'. A left sidebar contains options like 'Customize this page' and 'Refresh page'.

2 On the left menu, click on "NEW PATIENT"

The screenshot shows the DentiMax Patient List interface. The left sidebar has a 'NEW PATIENT' button circled in orange. The main area displays a table of patient records. The table has the following columns: Chart No., Last Name, First Name, Language, Gender, Birth Date, Preferred Contact Method, Home Phone, Work Phone, Mobile, E-mail, and Default Primary Insurance. The data rows are as follows:

Chart No.	Last Name	First Name	Language	Gender	Birth Date	Preferred Contact Method	Home Phone	Work Phone	Mobile	E-mail	Default Primary Insurance
TESBO000	Test	Bob Sr.		M	1/1/1969				(458) 453-2456 S		UN001
TESBO001	Test	Timmy		M	1/1/2011				(454) 845-5542		
TESDE000	Test	Dentmax	English	F	5/27/1990		5555555555		5555555555	test@test	
TESDU000	Test	Dummy		F	1/1/2001				888-888888		AET00
TESSH000	Test	Sunny		F	1/1/2011		(484) 848-4494		988-8888		AET00
TESTE000	Test	Testy	Creole	U	8/15/1996	Text	8007048494		4808251875	tiffanye@dentmax.com	AME01
TESTE001	Test	Testy		F	1/1/2001				(888) 888-8888		AET00
TESTE002	Test	Testy B		F	1/1/2001				(888) 888-8888		
TESTE003	Test	Testy C		F	1/1/2001				(888) 888-8888		
WEAW2000	Weather	Windy		F	1/1/2001				(545) 854-5525		AET00

3

You will begin entering the patient information. The red fields are required fields; you will not be able to move on if any of these are left blank. The yellow fields are the recommended fields. Complete all fields as needed

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information -

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

Save Changes Cancel Changes Add a new family member Load Patient Picture Acquire Patient Picture More Information View Appointments View Ledger View Claims Prescriptions View Old Prescriptions Payment Plan Manage Allergies 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...

Chart Number: [] Deceased [] VIP [] Not a Patient [] Inactive

Last Name: [] Notes: []
First Name: [] Middle Initial: []
Nickname: [] Alerts: []
Head of [] Self [] Household: [] Appts: []
Street: []
Street 2: [] Eligibility Expired
City: [] State: [] Family: [] No Lab Orders
Postal Code: []
Home Phone: []
Work Phone: [] Preferred Contact Method: []
Mobile Phone: [] Preferred Scheduling Hours: []
E-mail: []
Gender: [] SIN/SSN: [] Assigned Provider: TES00 Test, Terry
Marital Status: [] Driver License: [] Assigned Hygienist: []
Birth Date: [] Other ID: [] Student Status: []
Language: [] Employer: []
Facility: []
Group: [] Locotor #: []
Billing Code: []
Last Statement: []
Last Completed Recall: []
Next Scheduled Recall: [] Do Not Bill Patient [] Balance: []
Next Eligible Recall: [] Manually Set Recall Date []

Recall Every: 6 Months Plus 1 Day []
Use Recall []

4

To include patient in the recall protocol make the "USE RECALL" box

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information -

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

Save Changes Cancel Changes Add a new family member Load Patient Picture Acquire Patient Picture More Information View Appointments View Ledger View Claims Prescriptions View Old Prescriptions Payment Plan Manage Allergies 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...

Chart Number: [] Deceased [] VIP [] Not a Patient [] Inactive

Last Name: [] Notes: []
First Name: [] Middle Initial: []
Nickname: [] Alerts: []
Head of [] Self [] Household: [] Appts: []
Street: []
Street 2: [] Eligibility Expired
City: [] State: [] Family: [] No Lab Orders
Postal Code: []
Home Phone: []
Work Phone: [] Preferred Contact Method: []
Mobile Phone: [] Preferred Scheduling Hours: []
E-mail: []
Gender: [] SIN/SSN: [] Assigned Provider: TES00 Test, Terry
Marital Status: [] Driver License: [] Assigned Hygienist: []
Birth Date: [] Other ID: [] Student Status: []
Language: [] Employer: []
Facility: []
Group: [] Locotor #: []
Billing Code: []
Last Statement: []
Last Completed Recall: []
Next Scheduled Recall: [] Do Not Bill Patient [] Balance: []
Next Eligible Recall: [] Manually Set Recall Date []

Recall Every: 6 Months Plus 1 Day []
Use Recall []

5 Select the recall timeframe

The screenshot shows the 'Patient Information' form in the Dentimax software. The 'Recall' section is highlighted with an orange circle. The 'Recall' dropdown menu is set to '6 Months' and the 'Plus 1 Day' checkbox is checked. The 'Next Scheduled Recall' field is empty, and the 'Next Eligible Recall' field is also empty. The 'Preferred Contact Method' dropdown menu is also highlighted with an orange circle.

6 Select the preferred contact method from the dropdown menu. This is not a required field; however we recommend you complete this field as it will be present in other areas of the system

The screenshot shows the 'Patient Information' form in the Dentimax software. The 'Preferred Contact Method' dropdown menu is highlighted with an orange circle. The 'Preferred Scheduling Hours' field is also highlighted with an orange circle. The 'Recall' section is also highlighted with an orange circle, showing the 'Recall' dropdown menu set to '6 Months' and the 'Plus 1 Day' checkbox checked.

7 Select Assigned Provider from the dropdown

The screenshot shows the Dentimax Patient Information form. The "Assigned Provider" dropdown menu is open, showing a list of providers. The provider "Terry" is selected. A red circle highlights the dropdown menu.

Chart Number: _____ Deceased VIP Not a Patient Inactive

Last Name: _____ Notes: _____
First Name: _____ Middle Initial: _____
Nickname: _____ Alerts: _____
Head of Household: Self
Street: _____ Appts: _____
Street 2: _____ [Eligibility Expired](#)
City: _____ State: _____ [No Lab Orders](#)
Postal Code: _____ Family: _____
Home Phone: _____
Work Phone: _____ Preferred Contact Method: Mobile Phone
Mobile Phone: _____ Preferred Scheduling Hours: _____
E-mail: _____
Gender: _____ SIN/SSN: _____ Assigned Provider: TES00 - Q, Terry
Marital Status: _____ Driver License: _____ Assigned Hygienist: _____
Birth Date: _____ Other ID: _____ Student Status: _____
Language: _____ Employer: _____
Recall Every: 6 Months Plus 1 Day Facility: _____
Last Completed Recall: _____ Group: _____ Locator #: _____
Next Scheduled Recall: _____ Do Not Bill Patient Billing Code: _____
Next Eligible Recall: _____ Manually Set Recall Date Balance: _____ Last Statement: _____

8 For patients that have insurance click "Insurance Information" tab

The screenshot shows the Dentimax Patient Information form with the "Insurance Information" tab selected. The form displays patient information for "Test, Terry". A red circle highlights the "Insurance Information" tab.

Chart Number: _____ Deceased VIP Not a Patient Inactive

Last Name: Test Notes: _____
First Name: Testy Middle Initial: _____
Nickname: _____ Alerts: _____
Head of Household: Self
Street: _____ Appts: _____
Street 2: _____ [Eligibility Expired](#)
City: _____ State: _____ [No Lab Orders](#)
Postal Code: _____ Family: _____
Home Phone: _____
Work Phone: _____ Preferred Contact Method: _____
Mobile Phone: (888) 888-8888 Preferred Scheduling Hours: _____
E-mail: _____
Gender: Female SIN/SSN: 888-88-8822 Assigned Provider: TES00 - Q, Test, Terry
Marital Status: _____ Driver License: _____ Assigned Hygienist: _____
Birth Date: 1/1/2001 24yrs Other ID: 888-88-8888 Student Status: _____
Language: _____ Employer: _____
 Use Recall Facility: _____
Recall Every: 6 Months Plus 1 Day Group: _____ Locator #: _____
Last Completed Recall: _____ Do Not Bill Patient Billing Code: _____
Next Scheduled Recall: _____ Balance: _____ Last Statement: _____
Next Eligible Recall: _____ Manually Set Recall Date

9

Select "Relationship to Subscriber" from the dropdown

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, | Insurance Information | Medical Alerts | Extra Info | Custom | Missing Teeth

General
Save Changes [ESC]
Cancel Changes [ESC]
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Release of Information

Primary Insurance
Patient Relation to Subscriber: [Self] [v]
Subscriber: [Spouse] [v] [Q]
Primary Insurance: [Dependent] [v] [Q]
Subscriber ID: [Other] [v]
Group Number: _____

Assignment of Benefits

Secondary Insurance
Relation to Primary Subscriber: _____ [v]
Subscriber: _____ [v] [Q]
Secondary Insurance: _____ [v] [Q]
Subscriber ID: _____ [v]
Group Number: _____

Assignment of Benefits
COB: _____ [v]

10

Click here

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, | Insurance Information | Medical Alerts | Extra Info | Custom | Missing Teeth

General
Save Changes [ESC]
Cancel Changes [ESC]
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Release of Information

Primary Insurance
Patient Relation to Subscriber: [Self] [v]
Subscriber: [Spouse] [v] [Q]
Primary Insurance: [Dependent] [v] [Q]
Subscriber ID: [Other] [v]
Group Number: _____

Assignment of Benefits

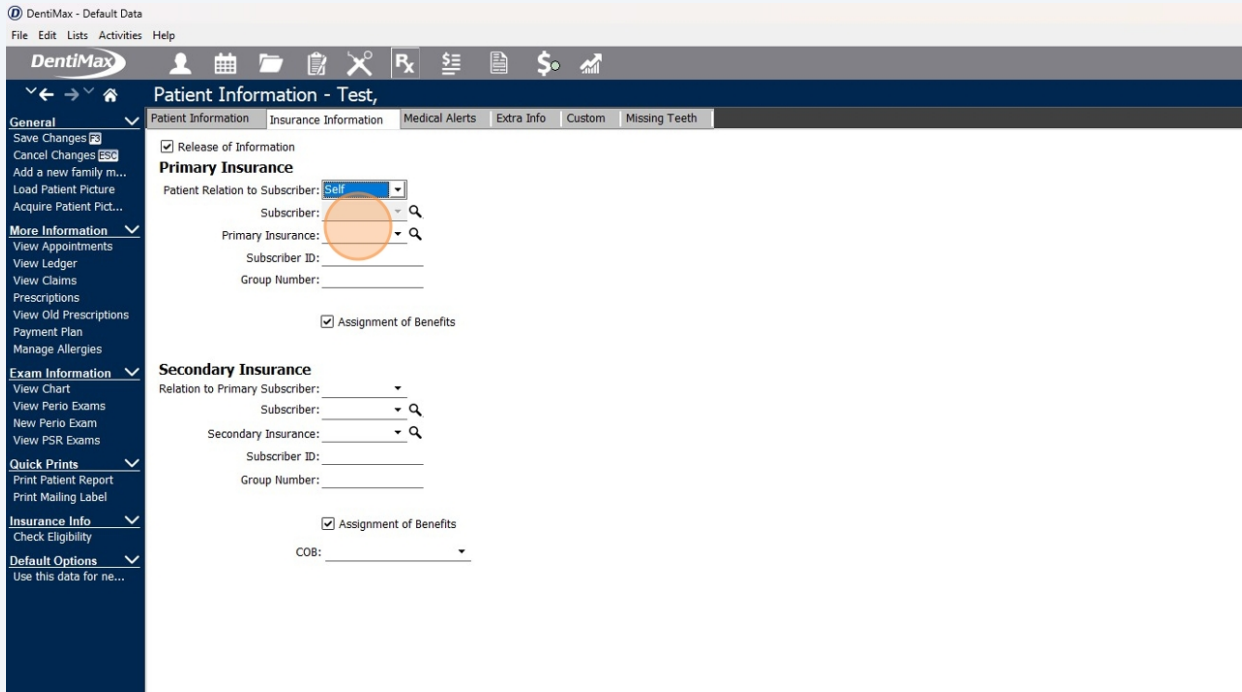
Secondary Insurance
Relation to Primary Subscriber: _____ [v]
Subscriber: _____ [v] [Q]
Secondary Insurance: _____ [v] [Q]
Subscriber ID: _____ [v]
Group Number: _____

Assignment of Benefits
COB: _____ [v]

11

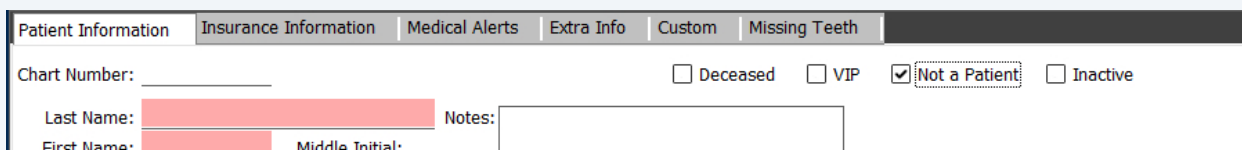
If Subscriber is Self; you will not need to fill in the subscriber field. If the subscriber is not Self; you will need search for the subscriber from the patient list search.

If the subscriber is not currently a patient in the "Patient List" you will need to create a patient account for the subscriber as well. If the subscriber will not be an active patient in the office, you will need to mark the subscriber's "patient" account as "not a patient". See second image below.



12

Step



13 Next, you will select the Primary Insurance from the drop down menu

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, Patient Information Insurance Information Medical Alerts Extra Info Custom Missing Teeth

General
Save Changes
Cancel Changes
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Primary Ins
Search for Primary L...
Edit Primary Ins
New Primary Ins

Release of Information

Primary Insurance

Patient Relation to Subscriber: Self

Subscriber: _____

Primary Insurance: _____

Subscriber ID:	Code	Name	City	Group Name	Group Number	Insurance Type
00000						
	AET00	Aetna	Lexington			2
	ALLO0	Allied Benefits Services	Chicago			2
	AME00	Ameritas Life Ins. Corp	Lincoln			2
	AME01	AmeriBen Solutions, Inc.	Boise			2
	ANT00	ANTHEM	San Antonio			2
	ASS00	Assurant, Inc	Clinton			2
	ASS01	Assured Benefits Administrators	El Paso			2

Secondary Insurance

Relation to Primary Subscriber: _____

Subscriber: _____

Secondary Insurance: _____

Subscriber ID: _____

Group Number: _____

Assignment of Benefits

COB: _____

14 Enter Subscriber ID number and Group number

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, Patient Information Insurance Information Medical Alerts Extra Info Custom Missing Teeth

General
Save Changes
Cancel Changes
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Primary Ins
Search for Primary L...
Edit Primary Ins
New Primary Ins

Release of Information

Primary Insurance

Patient Relation to Subscriber: Self

Subscriber: _____

Primary Insurance: AET00 Aetna

Subscriber ID: _____

Group Number: _____

Assignment of Benefits [Remove](#)

Secondary Insurance

Relation to Primary Subscriber: _____

Subscriber: _____

Secondary Insurance: _____

Subscriber ID: _____

Group Number: _____

Assignment of Benefits

COB: _____

15 Click "Medical Alerts" tab

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, **Medical Alerts** Extra Info Custom Missing Teeth

General
Save Changes ESC
Cancel Changes ESC
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Release of Information

Primary Insurance
Patient Relation to Subscriber: Self
Subscriber: _____
Primary Insurance: AET00 Aetna
Subscriber ID: W888888
Group Number: 123
 Assignment of Benefits [Remove](#)

Secondary Insurance
Relation to Primary Subscriber: _____
Subscriber: _____
Secondary Insurance: _____
Subscriber ID: _____
Group Number: _____
 Assignment of Benefits
COB: _____

16 Select ALL "Medical Alerts" that apply

DentiMax

Patient Information - Test, **Medical Alerts** Extra Info Custom Missing Teeth

General
Save Changes ESC
Cancel Changes ESC
Add a new family m...
Load Patient Picture
Acquire Patient Pict...

More Information
View Appointments
View Ledger
View Claims
Prescriptions
View Old Prescriptions
Payment Plan
Manage Allergies

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...

Alerts Last Updated:

Use	Name
<input type="checkbox"/>	Premedicate
<input type="checkbox"/>	Acid Reflux
<input type="checkbox"/>	Allergy - Aspirin
<input type="checkbox"/>	Allergy - Barbiturates
<input type="checkbox"/>	Allergy - Codeine
<input type="checkbox"/>	Allergy - Local Anesthetic
<input type="checkbox"/>	Allergy - Penicillin
<input type="checkbox"/>	Allergy - Sulfa
<input type="checkbox"/>	Allergy - Iodine
<input type="checkbox"/>	Allergy - Latex
<input type="checkbox"/>	Allergy - Metals
<input type="checkbox"/>	Anemia
<input type="checkbox"/>	Anxiety/Nervousness
<input type="checkbox"/>	Artificial Joints
<input type="checkbox"/>	Arthritis, Rheumatism
<input type="checkbox"/>	Artificial Heart Valves
<input type="checkbox"/>	Asthma
<input type="checkbox"/>	Back Problems
<input type="checkbox"/>	Bleeding Abnormally
<input type="checkbox"/>	Blood Disease
<input type="checkbox"/>	Cancer
<input type="checkbox"/>	Chemical Dependency
<input type="checkbox"/>	Chemotherapy/Radiation
<input type="checkbox"/>	Circulatory Problems
<input type="checkbox"/>	Congenital Heart Lesions
<input type="checkbox"/>	Cortisone Treatments
<input type="checkbox"/>	Cough up Blood
<input type="checkbox"/>	Cough, Persistent
<input type="checkbox"/>	Dental-Phobia

Medication Alerts

Date Modified	Medication	Dosage	Purpose	Date Entered
---------------	------------	--------	---------	--------------

[Remove](#) [Add](#) [Edit](#) [Mark Updated](#)

17

You can enter any Medications as needed by clicking "add"

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, Patient Information Insurance Information Medical Alerts Extra Info Custom Missing Teeth

Alerts Last Updated: 6/24/2025
Allergy - Latex, Artificial Joints, Asthma

Medication Alerts
Date Modified Medication Dosage Purpose Date Entered

Use	Name
<input type="checkbox"/>	Premedicate
<input type="checkbox"/>	Acid Reflux
<input type="checkbox"/>	Allergy - Aspirin
<input type="checkbox"/>	Allergy - Barbiturates
<input type="checkbox"/>	Allergy - Codeine
<input type="checkbox"/>	Allergy - Local Anesthetic
<input type="checkbox"/>	Allergy - Penicillin
<input type="checkbox"/>	Allergy - Sulfa
<input type="checkbox"/>	Allergy - Iodine
<input checked="" type="checkbox"/>	Allergy - Latex
<input type="checkbox"/>	Allergy - Metals
<input type="checkbox"/>	Anemia
<input type="checkbox"/>	Anxiety/Nervousness
<input checked="" type="checkbox"/>	Artificial Joints
<input type="checkbox"/>	Arthritis, Rheumatism
<input type="checkbox"/>	Artificial Heart Valves
<input checked="" type="checkbox"/>	Asthma
<input type="checkbox"/>	Back Problems
<input type="checkbox"/>	Bleeding Abnormally
<input type="checkbox"/>	Blood Disease
<input type="checkbox"/>	Cancer
<input type="checkbox"/>	Chemical Dependency
<input type="checkbox"/>	Chemotherapy/Radiation
<input type="checkbox"/>	Circulatory Problems
<input type="checkbox"/>	Congenital Heart Lesions
<input type="checkbox"/>	Cortisone Treatments

Remove Add Edit Mark Updated

18

Click "Add"

Default Data
Activities Help

DentiMax

Patient Information - Test, Patient Information Insurance Information Medical Alerts Extra Info Custom Missing Teeth

Alerts Last Updated: 6/24/2025
Allergy - Latex, Artificial Joints, Asthma

Medication Alerts
Date Modified Medication Dosage Purpose Date Entered

Use	Name
<input type="checkbox"/>	Premedicate
<input type="checkbox"/>	Acid Reflux
<input type="checkbox"/>	Allergy - Aspirin
<input type="checkbox"/>	Allergy - Barbiturates
<input type="checkbox"/>	Allergy - Codeine
<input type="checkbox"/>	Allergy - Local Anesthetic
<input type="checkbox"/>	Allergy - Penicillin
<input type="checkbox"/>	Allergy - Sulfa
<input type="checkbox"/>	Allergy - Iodine
<input checked="" type="checkbox"/>	Allergy - Latex
<input type="checkbox"/>	Allergy - Metals
<input type="checkbox"/>	Anemia
<input type="checkbox"/>	Anxiety/Nervousness
<input checked="" type="checkbox"/>	Artificial Joints
<input type="checkbox"/>	Arthritis, Rheumatism
<input type="checkbox"/>	Artificial Heart Valves
<input checked="" type="checkbox"/>	Asthma
<input type="checkbox"/>	Back Problems
<input type="checkbox"/>	Bleeding Abnormally
<input type="checkbox"/>	Blood Disease
<input type="checkbox"/>	Cancer
<input type="checkbox"/>	Chemical Dependency
<input type="checkbox"/>	Chemotherapy/Radiation
<input type="checkbox"/>	Circulatory Problems
<input type="checkbox"/>	Congenital Heart Lesions
<input type="checkbox"/>	Cortisone Treatments

Remove Add Edit Mark Updated

19 Click "Extra Info" tab

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test,

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

Alerts Last Updated: 6/24/2025
Allergy - Latex, Artificial Joints, Asthma

Date Modified	Medication	Dosage	Purpose	Date Entered
6/24/2025	Amox			

Use Name

- Premedicate
- Acid Reflux
- Allergy - Aspirin
- Allergy - Barbiturates
- Allergy - Codeine
- Allergy - Local Anesthetic
- Allergy - Penicillin
- Allergy - Sulfa
- Allergy - Iodine
- Allergy - Latex
- Allergy - Metals
- Anemia
- Anxiety/Nervousness
- Artificial Joints
- Arthritis, Rheumatism
- Artificial Heart Valves
- Asthma
- Back Problems
- Bleeding Abnormally
- Blood Disease
- Cancer
- Chemical Dependency
- Chemotherapy/Radiation
- Circulatory Problems
- Congenital Heart Lesions
- Cortisone Treatments

Remove Add Edit Mark Updated

20 Here you can enter Emergency Contact Info as needed

General Patient Information Insurance Information Medical Alerts **Additional** Custom Missing Teeth

Additional Information

Extra 1

Extra 2

Extra 3

Extra 4

Extra 5

Extra 6

Extra 7

Extra 8

Extra 9

Extra 10

Extra 11

Emergency Contact Information

Contact:

Contact Phone: Contact Phone 2:

Referral Information

Referral Source:

Referring Provider:

Referral Number:

Patient Referral:

Medical Information

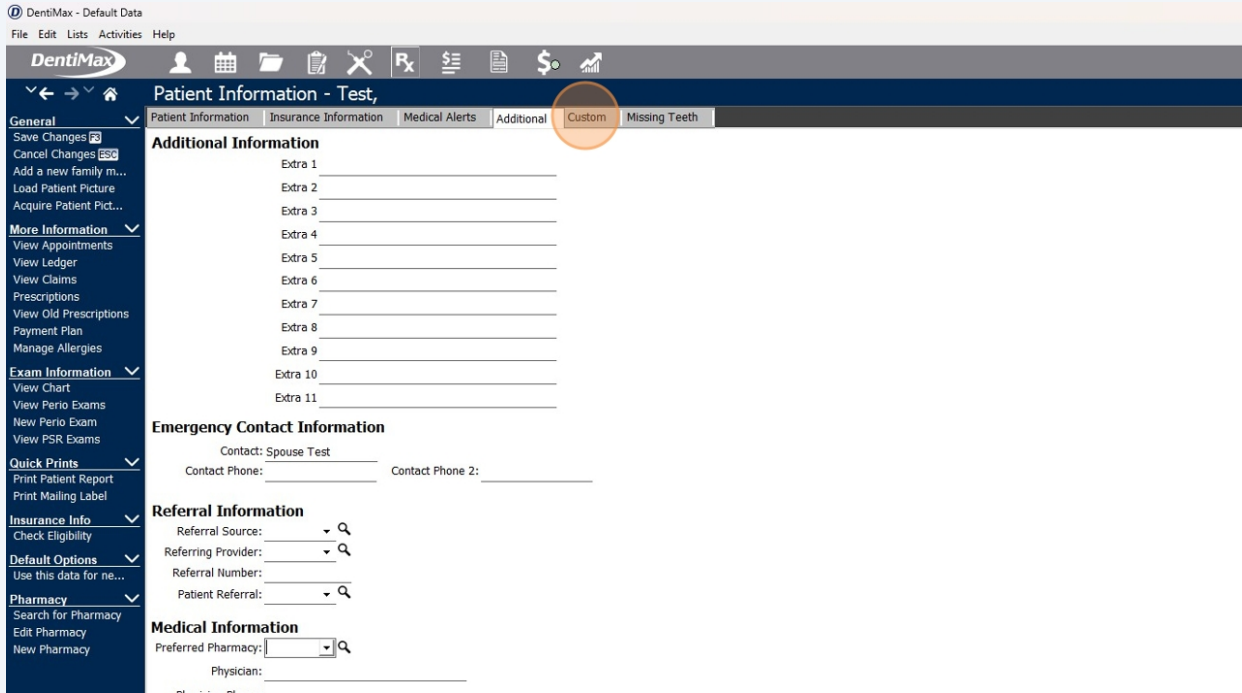
Preferred Pharmacy:

Physician:

Physician Phone:

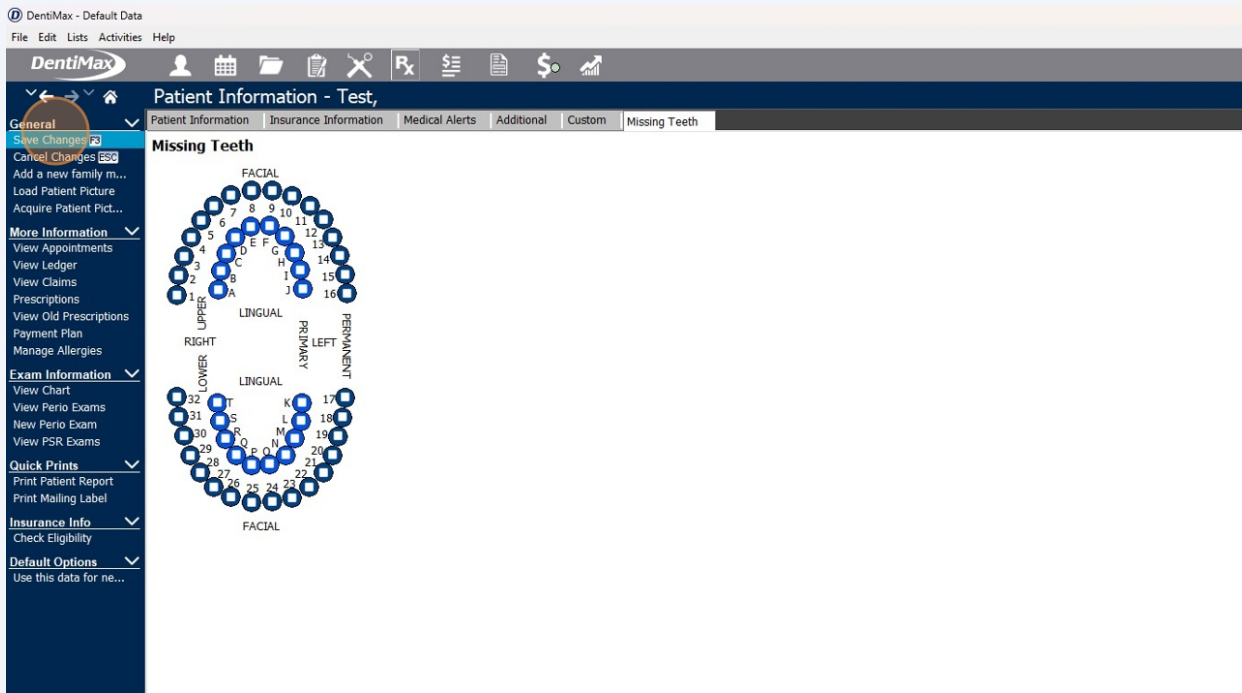
21

The Custom and Missing Teeth tab can be used as you see fit but are not necessary



22

When you have completed all tabs ALWAYS CLICK "SAVE CHANGES"



23

Another way to enter a NEW PATIENT is from the SCHEDULER. Click the "Schedule" icon to open the schedule

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax [Icons]

Patient List - Bob Sr. Test

General
Close Screen
Customize View
Customize Filter

Modify Data
Edit Patient
Delete Patient
New Patient

Other Information
View Chart
View Perio Exams
View PSR Exams
View Ledger
View Treatment Esti...
View Prescriptions

Head of Household: _____ Assigned Provider: _____
Last Name: _____ First Name: _____
Default Primary Insurance: _____ Birth Date: _____
Mobile: _____

Search: _____ Search by: Chart Number View: Patient List

Chart Nu...	Last Name	First Name	Language	Gender	Birth Date	Preferred Contact Method	Home Phone	Work Phone	Mobile	E-mail	Default Primary
TESBO000	Test	Bob Sr.		M	1/1/1969				(458) 453-2456 5		UNI01
TESBO001	Test	Timmy		M	1/1/2011				(454) 845-5542		
TESDE000	Test	Dentimax	English	F	5/27/1990		5555555555		5555555555	test@test	
TESDU000	Test	Dummy		F	1/1/2001				888-888888		AET00
TESSH000	Test	Sunny		F	1/1/2011		(484) 848-4484		988-8888		AET00
TESTE000	Test	Test	Creole	U	8/15/1996	Text	8007048494		4808251875	tiffanye@dentimax.com	AME01
TESTE001	Test	Testy		F	1/1/2001				(888) 888-8888		AET00
WEAWI000	Weather	Windy		F	1/1/2001				(545) 854-5525		AET00

24

Double-click on the time slot you want to put the patient in; this will open the Appointment Entry screen

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax [Icons]

Tuesday - June 24, 2025

1 2 3 4 5 6 7
8 9 10 11 12 13 14
15 16 17 18 19 20 21
22 23 24 25 26 27 28
29 30 1 2 3 4 5
6 7 8 9 10 11 12

Go to Today +14 +90 +6 Mos

General
Close Screen
Refresh Screen

Manage Appts
View Scheduled Rev...
Appointment List

Create Appts
Add Appointment
Find Open Time Slot

Print
Print Patient Report
Print Label

Check Eligibility
For this Appointment
For all appointment...

	consults	restorative	Surgery
8 AM			
10			
20			
30			
40			
50			
9 AM			
10			
20			
30			
40			
50			
10 AM			
10			
20			
30			
40			
50			
11 AM			
10			
20			
30			
40			
50			
12 PM			
10			
20			
30			
40			

25

You will skip the "Patient" search box and move directly to the name entry fields; enter as much information as you can

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Appointment Entry

General

- Save Changes
- Cancel Changes
- Create Patient File
- Copy to Clipboard

Modify Data

- Appointment Recurr...
- Show Additional Inf...

Service Codes

- New Treatment Item
- Remove Treatment ...
- Edit Treatment Item
- Add From Multicode

More Information

- View Recall Informa...

Insurance Info

- Check Eligibility

Chart Number

- Search for Chart Nu...
- Edit Chart Number
- New Chart Number

Patient: [Search] [Q]

Last Name: [] Resource: OPT1 [Q]consults
First Name: [] Provider: [] [Q]

Home Phone: [] Date: 6/24/2025
Work Phone: [] Time: 9:00 AM
Mobile Phone: [] Length: 10 [Provider Time]
Color: [] E-mail: []

Status: Unconfirmed Recurrence: None

Note: []

Place on ASAP List Lab Case

Service Codes for this Appointment:

Account Code	Description	Tooth	Surface	Fee	Eligibility
					Not Checked

Appointment Total:

26

Enter any specific notes from patient. These notes will show on the appointment. ie: patient in pain UL

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Appointment Entry - Test, Testy B

General

- Save Changes
- Cancel Changes
- Create Patient File
- Copy to Clipboard

Modify Data

- Appointment Recurr...
- Show Additional Inf...

Service Codes

- New Treatment Item
- Remove Treatment ...
- Edit Treatment Item
- Add From Multicode

More Information

- View Recall Informa...

Insurance Info

- Check Eligibility

Patient: [Search] [Q]

Last Name: Test Resource: OPT1 [Q]consults
First Name: Testy B Provider: TES00 [Q]Test, Terry

Home Phone: [] Date: 6/24/2025
Work Phone: [] Time: 9:00 AM
Mobile Phone: [] Length: 10 [Provider Time]
Color: [] E-mail: []

Status: Unconfirmed Recurrence: None

Note: []

Place on ASAP List Lab Case

Service Codes for this Appointment:

Account Code	Description	Tooth	Surface	Fee	Eligibility
					Not Checked

Appointment Total:

27

You will add procedure codes to the appointment; these will also show on the appointment. There are several positive reasons to add the procedure codes to the appointments...it will pull procedures from the treatment plan, allows for faster and more precise posting, it will track daily production, etc.

Appointment Entry Form:

Patient: [Search]
Last Name: Test Resource: OPT1 Q consults
First Name: Testy B Provider: TES00 Q Test, Terry
Home Phone: _____ Date: 6/24/2025
Work Phone: _____ Time: 9:00 AM
Mobile Phone: _____ Length: 10 Provider Time
Color: _____ E-mail: _____
Status: Unconfirmed Recurrence: None
Note: Pain UL
 Place on ASAP List Lab Case

Service Codes for this Appointment:

Account Code	Description	Tooth	Surface	Fee	Eligibility Not Checked
--------------	-------------	-------	---------	-----	-------------------------

Appointment Total: _____

28

To add procedures to the appointment you can pull them 3 ways, add new treatment item; per procedure code, add from multicode or if there is a treatment plan you can pull from that.

DentiMax - Default Data
File Edit Lists Activities Help

Appointment Entry - Test, Testy B

General

Save Changes [Save]
Cancel Changes [ESC]
Create Patient File
Copy to Clipboard

Modify Data

Appointment Recurr...
Show Additional Inf...

Service Codes

New Treatment Item
Remove Treatment ...
Edit Treatment Item
Add From Multicode

More Information

View Recall Informa...

Insurance Info

Check Eligibility

Patient: [Search]
Last Name: Test Resource: OPT1 Q consults
First Name: Testy B Provider: TES00 Q Test, Terry
Home Phone: _____ Date: 6/24/2025
Work Phone: _____ Time: 9:00 AM
Mobile Phone: _____ Length: 10 Provider Time
Color: _____ E-mail: _____
Status: Unconfirmed Recurrence: None
Note: Pain UL
 Place on ASAP List Lab Case

Service Codes for this Appointment:

Account Code	Description	Tooth	Surface	Fee	Eligibility Not Checked
--------------	-------------	-------	---------	-----	-------------------------

Appointment Total: _____

29

A "multicode" is a single code that has multiple codes attached to it; you click on one code and it will add all the codes attached.

The screenshot shows the 'Add From Multicode' dropdown menu in the DentiMax software. The menu lists various dental procedures, including:

- All 4 Quadrants of Root Planning Scaling
- 4 Sealants
- Adult Prophy
- Adult Prophy Periodic Exam
- Adult Prophy, Periodic Exam 4 BWX
- Adult Prophy 4 BWX
- Child Prophy Periodic Exam
- Child Prophy, Periodic Exam Fluoride
- Child Prophy, Periodic Exam, 2 BWX Fluoride
- PFG Crown, Build Up, Seat
- Emergency Exam
- Endo, Post/Core, Crown
- Extraction, Bone Graft Implant placement
- Full Lower Arch Extraction
- Full Upper Arch Extraction
- Implant crown
- Implant Placement, Abutment PFG Crown
- Implant Placement, Custom Abutment Porcelain Crn
- Comprehensive ortho plan
- New Patient Appt w/FMX
- New Patient
- New Pt Appt w/4 BWX Prophy
- New Patient Exam w/ FMX
- Pano, Casts, Photos Comprehensive Ortho Tx
- Perio Exam, Debridement, Anti-Microb, RPS
- Perio Maintenance w/4BWX Exam
- Recall Appointment

The background shows a form with fields for Work Phone, Mobile Phone, Color, Status (Unconfirmed), Recurrence (None), Note (Pain UL), and Time (9:00 AM). A 'Surface Fee' field is highlighted in blue, and a link 'Eligibility Not Checked' is visible to its right.

30

Click "Save Changes"

The screenshot shows the 'Appointment Entry - Test, Testy B' form in the DentiMax software. The 'Save Changes' button in the 'General' section is highlighted with a red circle. The form contains the following information:

- Patient: Test
- Last Name: Test
- Resource: OPT1
- First Name: Testy B
- Provider: TES00
- Q: Test, Terry
- Home Phone: _____
- Date: 6/24/2025
- Work Phone: _____
- Time: 9:00 AM
- Mobile Phone: _____
- Length: 30
- Color: _____
- E-mail: _____
- Status: Unconfirmed
- Recurrence: None
- Note: Pain UL
- Place on ASAP List
- Lab Case

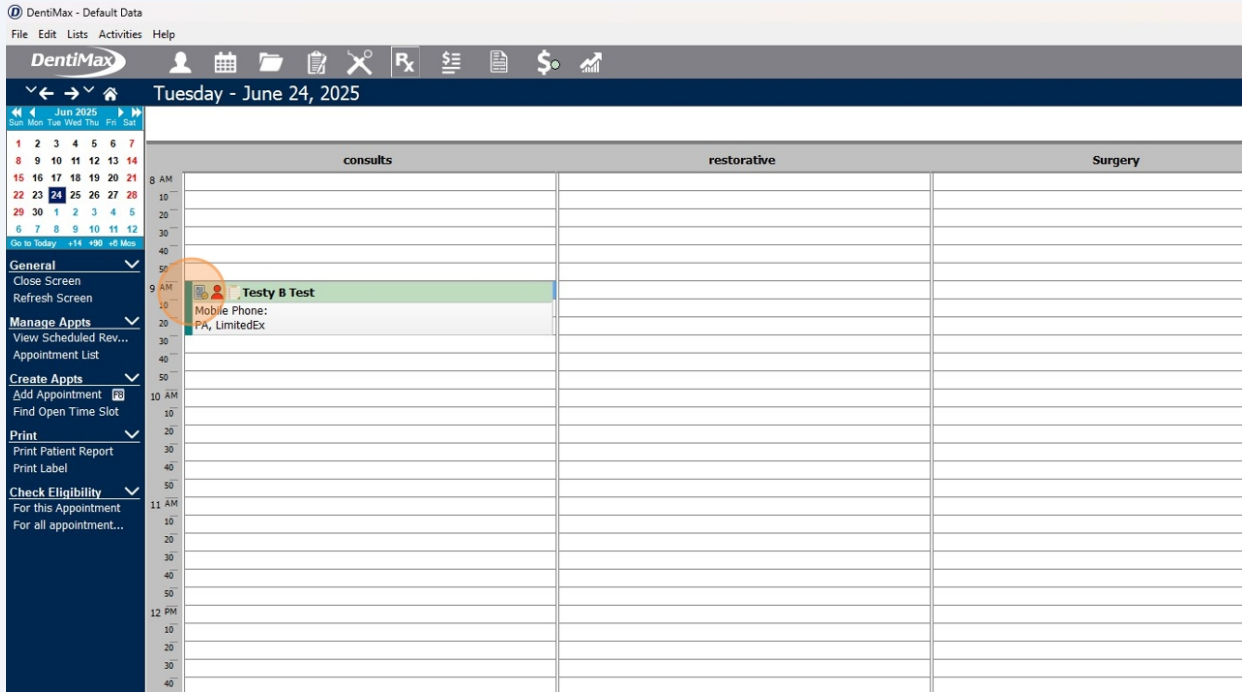
The 'Service Codes for this Appointment' table is shown below:

Account Code	Description	Tooth	Surface Fee
D0140	limited oral evaluation - proble		55.00
D0220	intraoral - periapical first radio		20.00

The 'Appointment Total' is 75.00. A link 'Eligibility Not Checked' is visible to the right of the table.

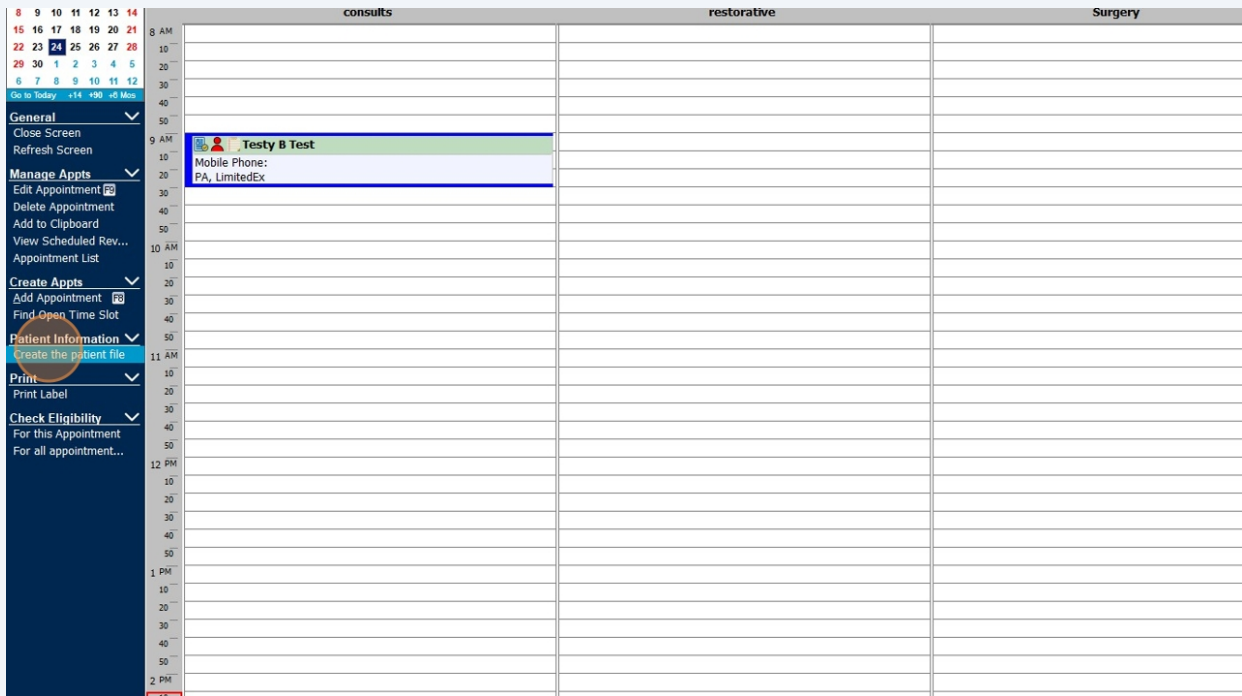
31

This will now create a NEW PATIENT appointment entry on the schedule. Please note: A NEW PATIENT appointment entry does not create a patient account; they do not have a chart number yet. On the schedule you will know this by the blue paper icon at the beginning of the appointment.



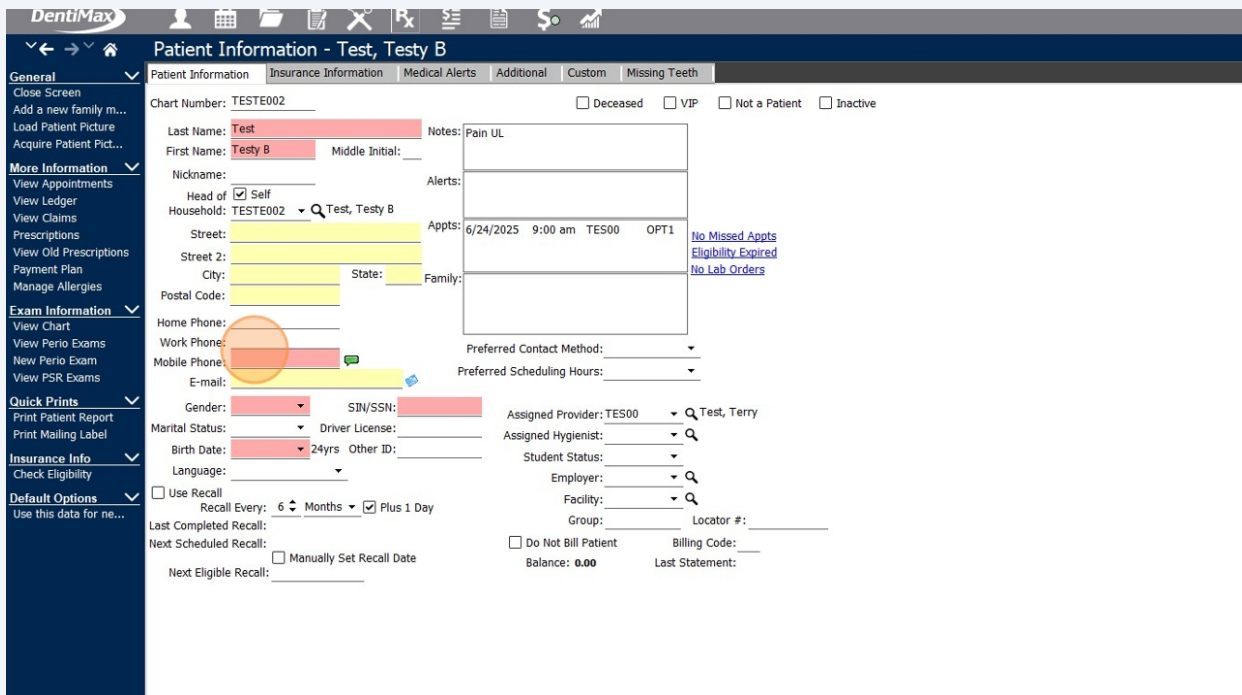
32

You will need to "Create the patient file". There are two ways you can do this. The first way is to click on the appointment, so it has the blue halo, and click on "Create the patient file" on the left menu.



33

Creating the patient file will bring you to the patient information page to complete as done in the previous steps and it creates the chart number.



34 Be sure to "Save Changes"

DentiMax - Default Data
File Edit Lists Activities Help

DentiMax

Patient Information - Test, Testy B

Chart Number: TESTE002 Deceased VIP Not a Patient Inactive

Last Name: **Test** Notes: Pain UL
 First Name: **Testy B** Middle Initial:
 Nickname:
 Head of Self Alerts:
 Household: TESTE002 Test, Testy B
 Street:
 Street 2:
 City: State: Family:
 Postal Code:
 Home Phone:
 Work Phone: Preferred Contact Method:
 Mobile Phone: (888) 888-8888 Preferred Scheduling Hours:
 E-mail:
 Gender: Female SIN/SSN: 888-88-2222 Assigned Provider: TES00 Test, Terry
 Marital Status: Driver License: Assigned Hygienist:
 Birth Date: 1/1/2001 24yrs Other ID: 888-88-2222 Student Status:
 Language: Employer:
 Use Recall Facility:
 Recall Every: 6 Months Plus 1 Day Group: Locator #:
 Last Completed Recall: Do Not Bill Patient Billing Code:
 Next Scheduled Recall: Balance: 0.00 Last Statement:
 Manually Set Recall Date
 Next Eligible Recall:
[No Missed Appts](#)
[Eligibility Expired](#)
[No Lab Orders](#)

General
 Save Changes **ES**
 Cancel Changes **ESC**
 Add a new family m...
 Load Patient Picture
 Acquire Patient Pict...
More Information
 View Appointments
 View Ledger
 View Claims
 Prescriptions
 View Old Prescriptions
 Payment Plan
 Manage Allergies
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...

35 The other way to "Create patient file"

On the schedule, click on the patient to select. Right click on the appointment

DentiMax

Tuesday - June 24, 2025

Jun 2025
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4 5 6 7
 8 9 10 11 12 13 14
 15 16 17 18 19 20 21
 22 23 24 25 26 27 28
 29 30 1 2 3 4 5
 6 7 8 9 10 11 12
 Go to Today +14 +30 +6 Mos

	consults	restorative	Surgery
8 AM			
10			
12			
2			
4			
6			
8			
10 AM	<div style="border: 1px solid gray; padding: 2px;"> Testy B Test Mobile Phone: (888) 888-8888 24 </div>		
12			
2			
4			
6			
8			
10 AM	<div style="border: 1px solid gray; padding: 2px;"> Testy C Test Mobile Phone: </div>		
12			
2			
4			
6			
8			
10			
12 PM			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			
8			
10			
12			
2			
4			
6			

36

When you right click you will get a new dropdown menu and you can select "create the patient file" and complete the previous steps

The screenshot displays a dental scheduling software interface. On the left, a vertical sidebar contains several menu categories: 'General' (Close Screen, Refresh Screen), 'Manage Appts' (Edit Appointment, Delete Appointment, Add to Clipboard, View Scheduled Rev..., Appointment List), 'Create Appts' (Add Appointment, Find Open Time Slot), 'Patient Information' (Create the patient file), 'Print' (Print Label), and 'Check Eligibility' (For this Appointment, For all appointment...). The main area is a calendar grid with columns for 'consults', 'restorative', and 'Surgery'. The time slots range from 8 AM to 2 PM. An appointment for 'Testy B Test' is scheduled at 10 AM in the 'consults' column. A right-click context menu is open over this appointment, listing options such as 'Add Appointment', 'Edit Appointment', 'Delete Appointment', 'Add to Clipboard', 'Add All to Clipboard', 'Create the patient file' (highlighted), 'Check Eligibility', 'View Recall Detail', 'View Estimate for this Appointment', 'Copy Appointment', 'Cut Appointment', 'Mark as ASAP Appointment', 'Print this Schedule', 'Send Text Message', 'Send E-mail Reminder', and 'Change Status'. The 'Create the patient file' option is highlighted in blue.