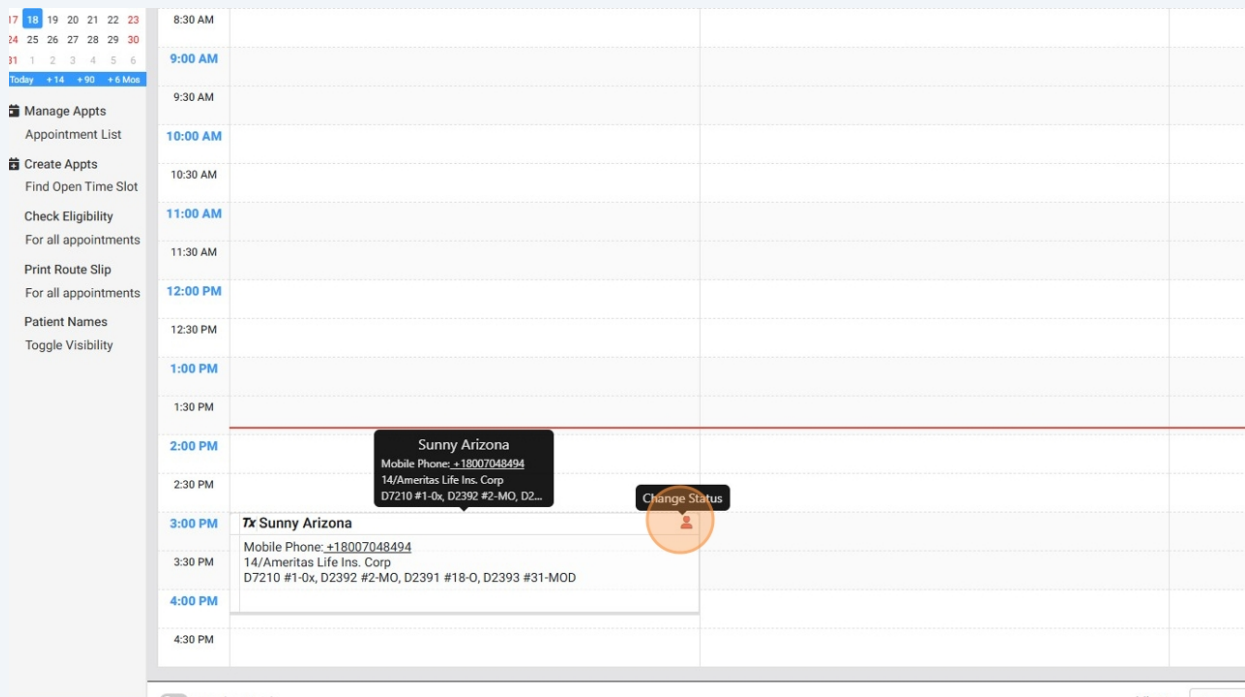


FLOW Completing patient appointments; posting to patient ledger from appointments

1

On the patients appointment on the schedule, you will use the Change Status function

The Change Status function is the icon in the upper right corner of the appointment. This is where you will see the status of the appointment: unconfirmed, left message, confirmed, where the patient is at in the office, or cancelled, missed and will call.



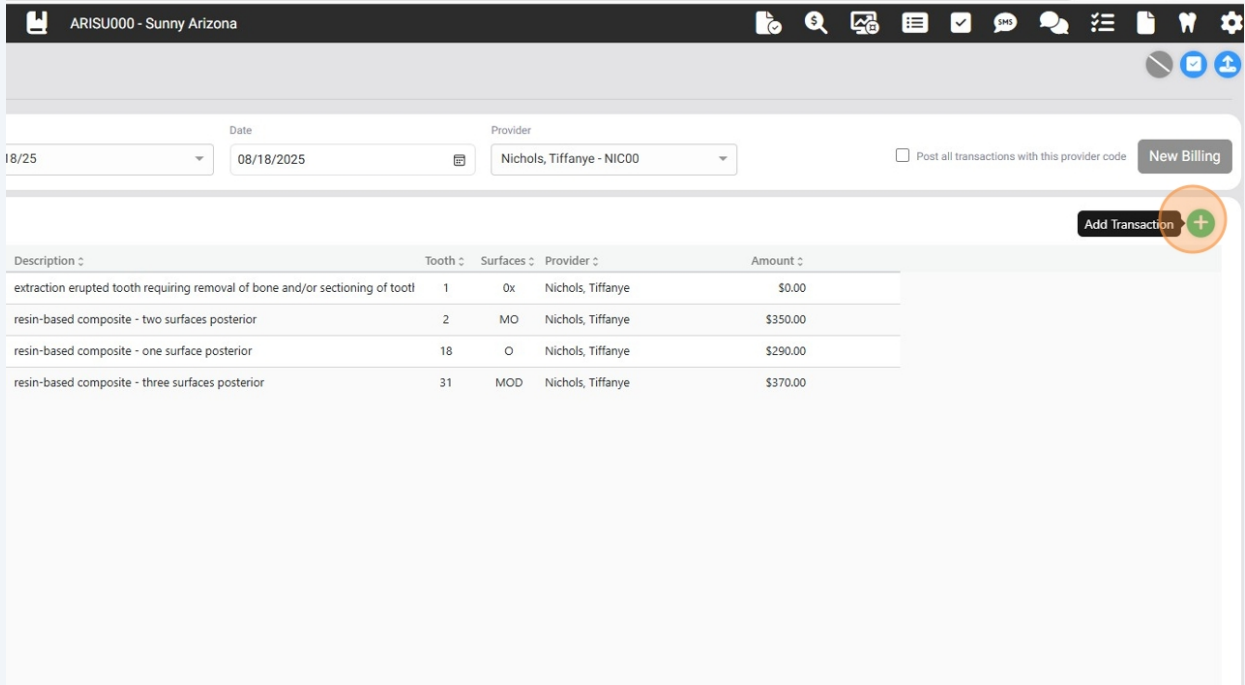
2 Click on the Status Change icon; select Complete

3 Your Post Transactions screen with open. Here you will see all procedures attached to the appointment with the option to post all or post selected procedures

Date	Plan	Order	Code	Description	Tooth	Surfaces	Provider	Am
<input type="checkbox"/>	8/18/25	1	2	D7210	extraction erupted tooth requiring removal of bone and/or sectioning of tooth	1	0x	Nichols, Tiffanye
<input type="checkbox"/>	8/18/25	1	2	D2392	resin-based composite - two surfaces posterior	2	MO	Nichols, Tiffanye
<input type="checkbox"/>	8/18/25	1	2	D2391	resin-based composite - one surface posterior	18	O	Nichols, Tiffanye
<input type="checkbox"/>	8/18/25	1	2	D2393	resin-based composite - three surfaces posterior	31	MOD	Nichols, Tiffanye

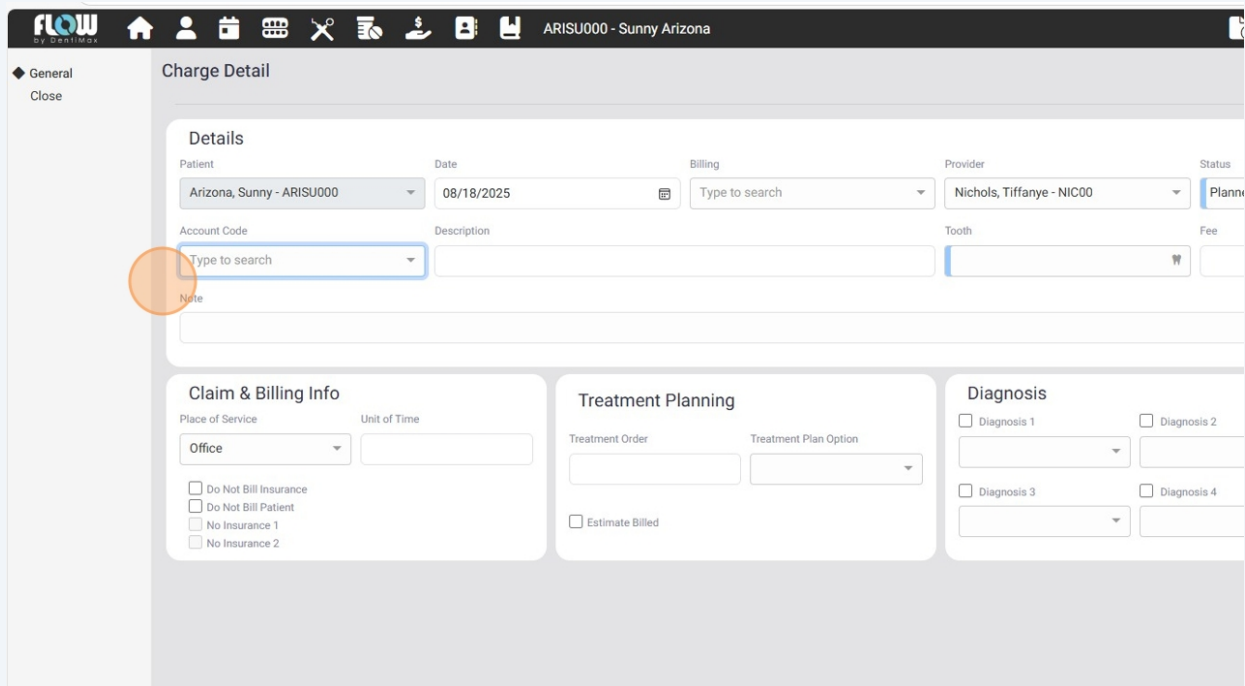
4 You also have the option to add additional procedures if needed;

If needed, click on the green "+" to enter the charge details for additional procedures



5 In the Charge Detail screen, you will add the procedure code(s)

Continue by clicking save or save and new for each additional procedure code



6

Back in Post Transactions it is now time to select procedures to be posted:

Either you will click Post All to complete all transactions or select each box for the appropriate procedures to be posted and click Post Selected

The screenshot displays the 'Post Transactions' screen in a dental software application. The interface includes a top navigation bar with the 'FLOW by Dentimax' logo and a patient identifier 'ARISU000 - Sunny Arizona'. On the left, a sidebar menu shows options: 'General', 'Do Not Post', 'Post Selected', and 'Post All'. The main area features a form with fields for Patient (Arizona, Sunny), Billing (7, 8/18/25), Date (08/18/2025), and Provider (Nichols, Tiffanye - NIC00). Below the form is a dropdown menu set to 'All'. A table lists transactions with the following columns: Date, Plan, Order, Code, Description, Tooth, Surfaces, Provider, and Amount. The first row is highlighted, and its checkbox is circled in orange.

Date	Plan	Order	Code	Description	Tooth	Surfaces	Provider	Amc
8/18/25	1	2	D7210	extraction erupted tooth requiring removal of bone and/or sectioning of tooth	1	Dx	Nichols, Tiffanye	
8/18/25	1	2	D2392	resin-based composite - two surfaces posterior	2	MO	Nichols, Tiffanye	\$
8/18/25	1	2	D2391	resin-based composite - one surface posterior	18	O	Nichols, Tiffanye	\$
8/18/25	1	2	D2393	resin-based composite - three surfaces posterior	31	MOD	Nichols, Tiffanye	\$

7

Post Transactions

Patient: Arizona, Sunny | Billing: 7, 8/18/25 | Date: 08/18/2025 | Provider: Nichols, Tiffanye - NIC00

Date	Plan	Order	Code	Description	Tooth	Surfaces	Provider
8/18/25	1	2	D7210	extraction erupted tooth requiring removal of bone and/or sectioning of tooth	1	0x	Nichols, Tiffanye
8/18/25	1	2	D2392	resin-based composite - two surfaces posterior	2	MO	Nichols, Tiffanye
8/18/25	1	2	D2391	resin-based composite - one surface posterior	18	O	Nichols, Tiffanye
8/18/25	1	2	D2393	resin-based composite - three surfaces posterior	31	MOD	Nichols, Tiffanye

8

If this patient is set as a Recall patient; this will prompt you to schedule the next Recall Appointment

Create New Recall Appointment

Scheduling an appointment for Sunny Arizona

Use	Code	Description	Prev Date	Prev Date	Last/Next
<input type="checkbox"/>	D1110	prophylaxis - adult			
<input type="checkbox"/>	D1120	prophylaxis - child			
<input type="checkbox"/>	D1203	topical application of fluoride - child			
<input type="checkbox"/>	D1206	topical application of fluoride varnish			
<input type="checkbox"/>	D1208	topical application of fluoride - excluding varnish			
<input type="checkbox"/>	D4341	periodontal scaling and root planing - four or more teeth per quadrant			
<input type="checkbox"/>	D4910	periodontal maintenance			
<input type="checkbox"/>	RCALL	Recall			

Notes

Current Primary Insurance Notes

Recall Notes

Date:
 • Timely Filing Deadline:
 • MTC:

Insert notes here ...

9 To schedule the Recall visit:

Select the appropriate procedures from the provided list

The screenshot shows the 'Create New Recall Appointment' interface for Sunny Arizona. The left sidebar has 'General' selected, with 'Schedule Now' highlighted. The main area shows a table of procedures with the 'Use' checkbox for 'D1110 prophylaxis - adult' circled in orange.

Use	Code	Description	Prev Date	Prev Date	Last/Next
<input checked="" type="checkbox"/>	D1110	prophylaxis - adult			
<input type="checkbox"/>	D1120	prophylaxis - child			
<input type="checkbox"/>	D1203	topical application of fluoride - child			
<input type="checkbox"/>	D1206	topical application of fluoride varnish			
<input type="checkbox"/>	D1208	topical application of fluoride - excluding varnish			
<input type="checkbox"/>	D4341	periodontal scaling and root planing - four or more teeth per quadrant			
<input type="checkbox"/>	D4910	periodontal maintenance			
<input type="checkbox"/>	RCALL	Recall			

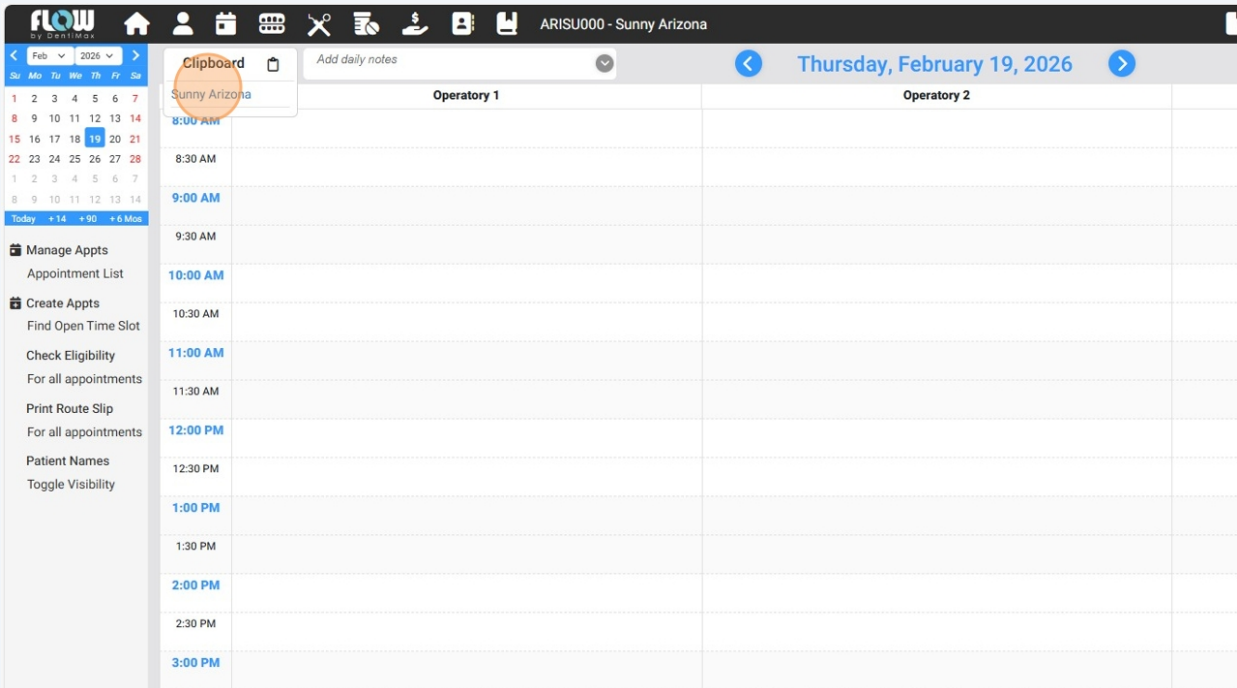
10 Click "Schedule Now"

The screenshot shows the 'Create New Recall Appointment' interface for Sunny Arizona. The left sidebar has 'General' selected, and 'Schedule Now' is highlighted with an orange circle. The main area shows the same table of procedures as in the previous screenshot, but the 'Use' checkbox for 'D1110 prophylaxis - adult' is now checked.

Use	Code	Description	Prev Date	Prev Date	Last/Next
<input checked="" type="checkbox"/>	D1110	prophylaxis - adult			
<input type="checkbox"/>	D1120	prophylaxis - child			
<input type="checkbox"/>	D1203	topical application of fluoride - child			
<input type="checkbox"/>	D1206	topical application of fluoride varnish			
<input type="checkbox"/>	D1208	topical application of fluoride - excluding varnish			
<input type="checkbox"/>	D4341	periodontal scaling and root planing - four or more teeth per quadrant			
<input type="checkbox"/>	D4910	periodontal maintenance			
<input type="checkbox"/>	RCALL	Recall			

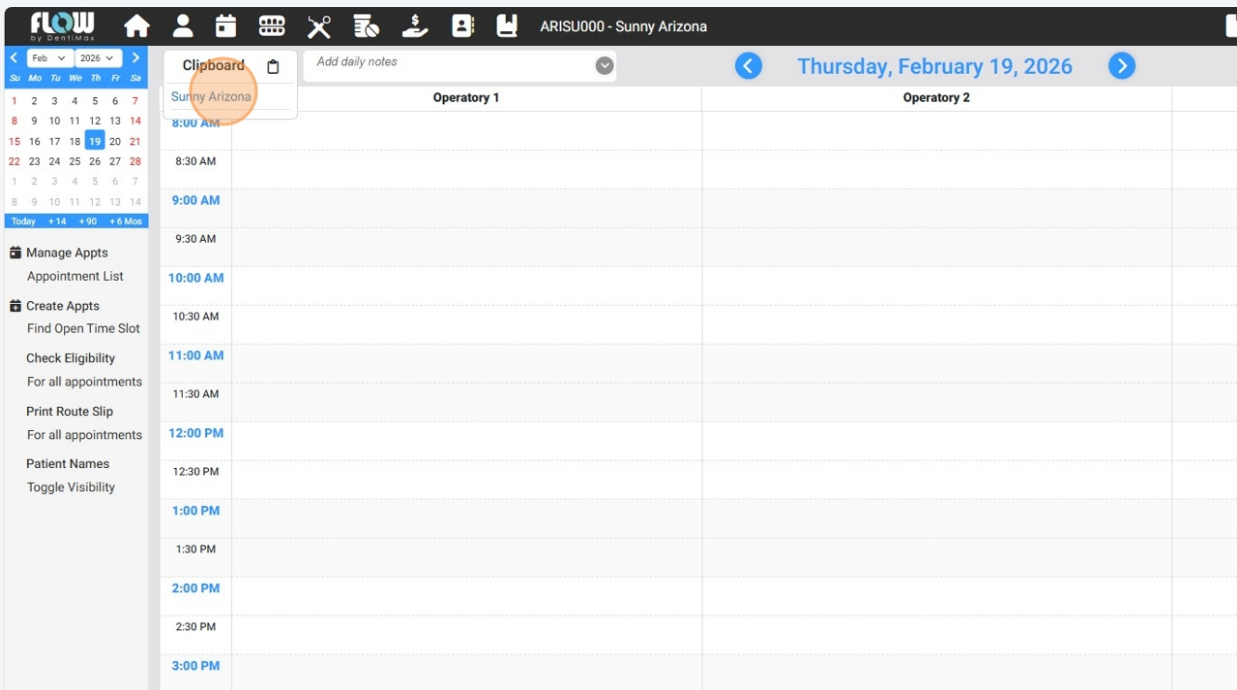
11

By clicking on Schedule Now, this will place the patient's appointment on the clipboard and the calendar will automatically take you to the correct date based on the patients recall settings (example: 3mth recall, 4mth recall, 6mth recall)



12

On the clipboard; click and hold the patient and drag and drop to the selected appointment time



13

The appointment will populate with the selected procedures attached

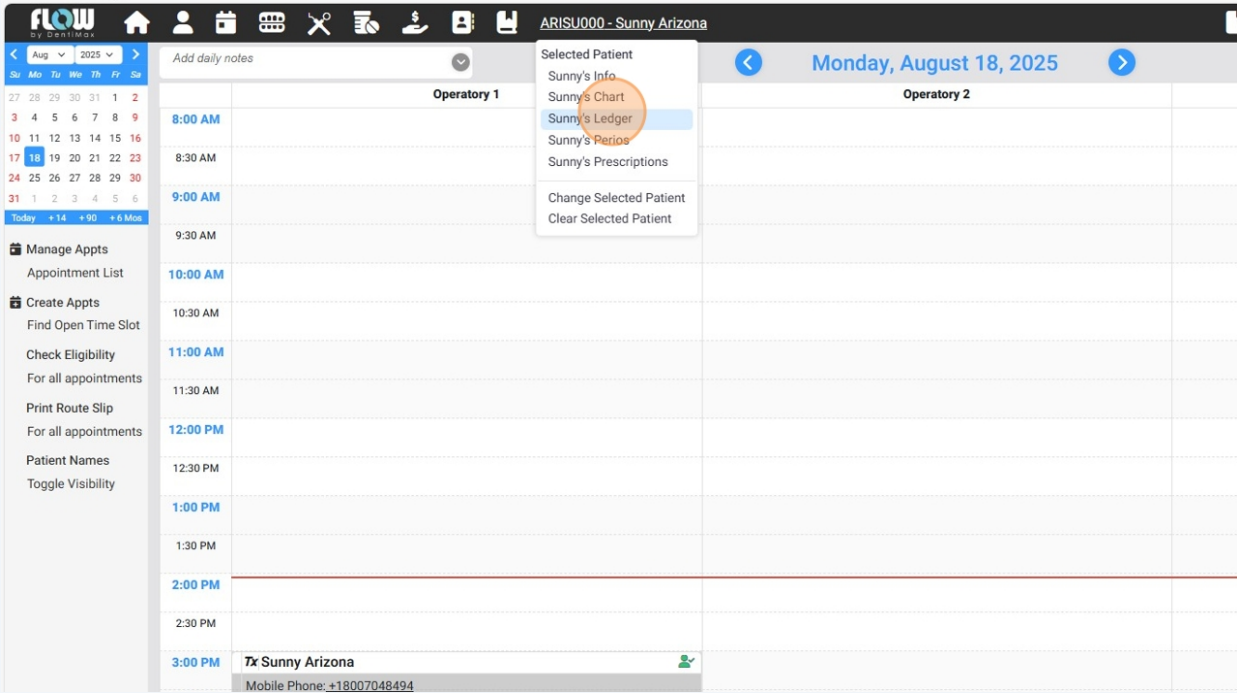
The screenshot shows a scheduling interface for Thursday, February 19, 2026. On the left, there is a calendar and a sidebar with navigation options: Manage Appts (Appointment List), Create Appts (Find Open Time Slot, Check Eligibility, Print Route Slip), and Patient Names (Toggle Visibility). The main area is a grid for two operators, Operator 1 and Operator 2, with time slots from 8:00 AM to 3:30 PM. An appointment is scheduled at 1:00 PM for Operator 1, titled 'Tx Sunny Arizona'. A callout box highlights the appointment details: 'Mobile Phone: +18007048494'.

14

Back on the current days schedule, you will now see that the scheduled appointment is marked with the Complete Status (green person with check mark) and the appointment is grayed out to signify it is a complete appointment

The screenshot shows the same scheduling interface as in slide 13, but the appointment at 1:00 PM is now marked as 'Complete'. The appointment row is grayed out, and a green person icon with a checkmark is visible next to the appointment title. The callout box is no longer present.

15 From the patient docking you can view the ledger



16 On the ledger the procedures that have been completed will be listed. You can proceed with collecting payments and creating claims as needed.

