Creating NEW PATIENT APPOINTMENT WITH PATIENT PROFILE

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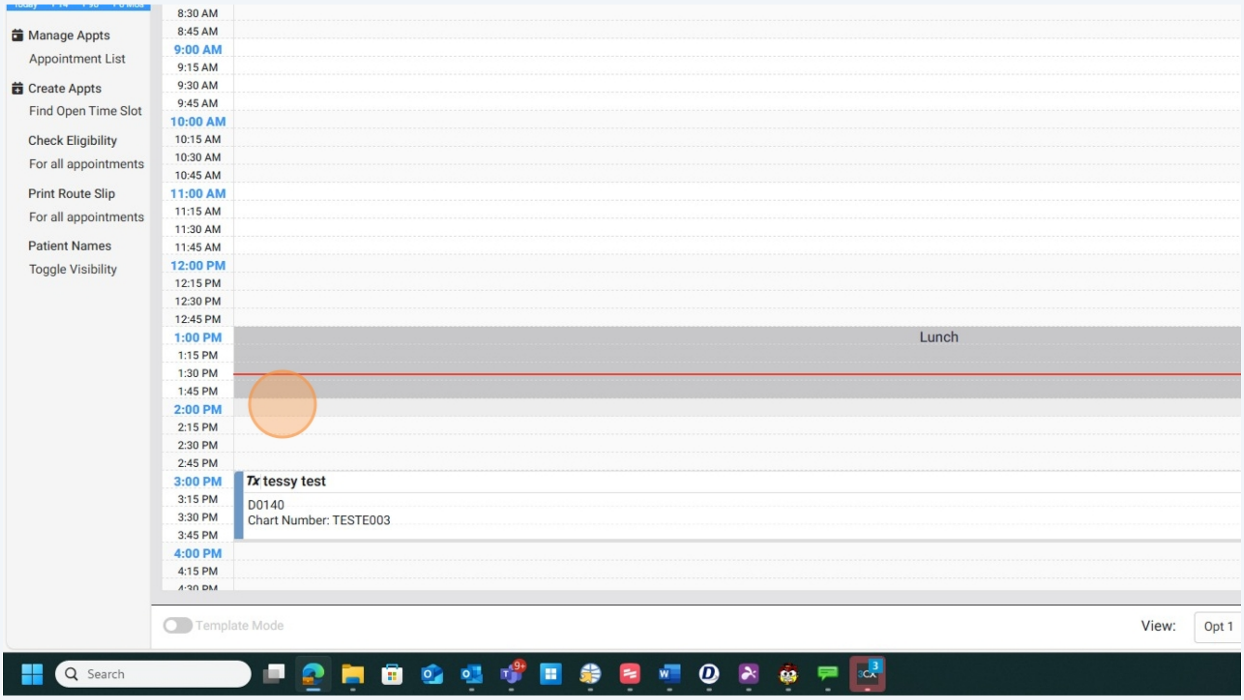
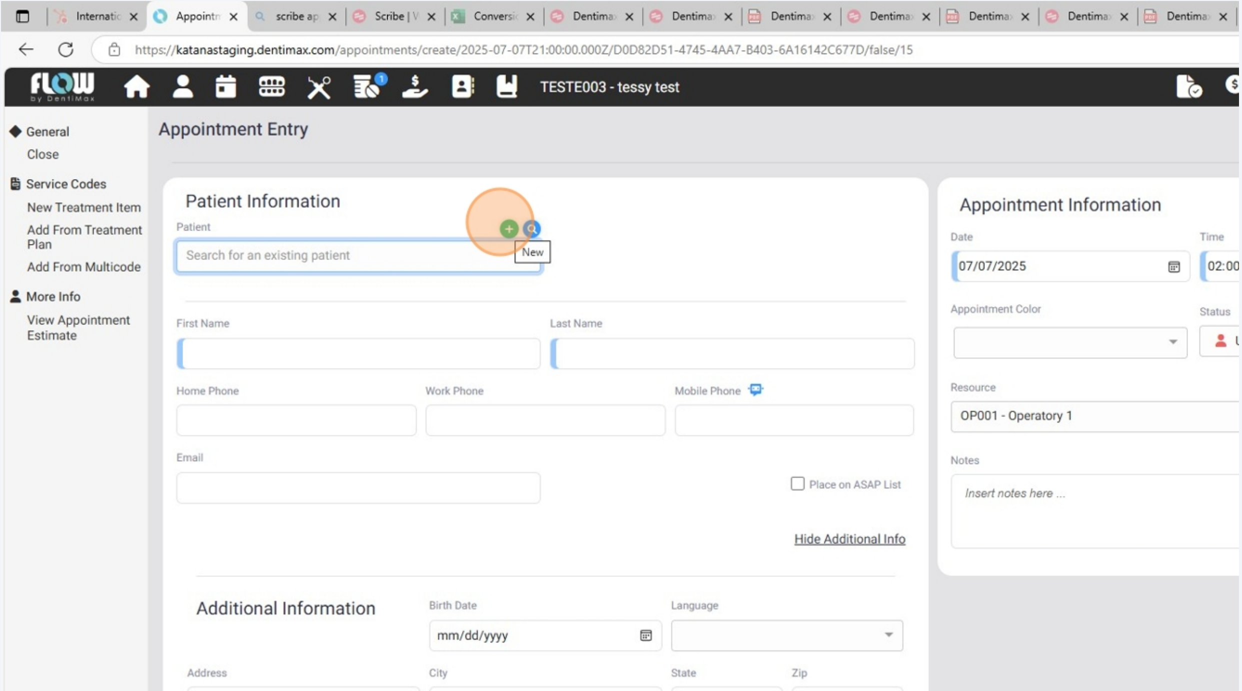
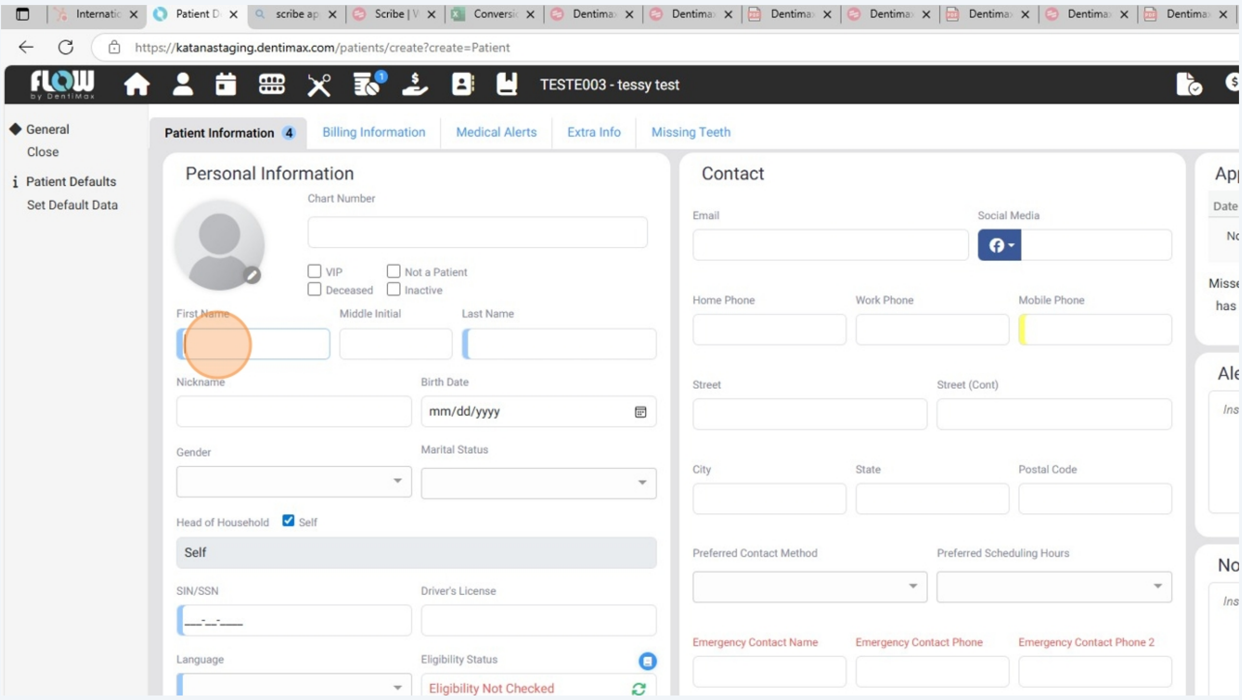
1 Select appointment time



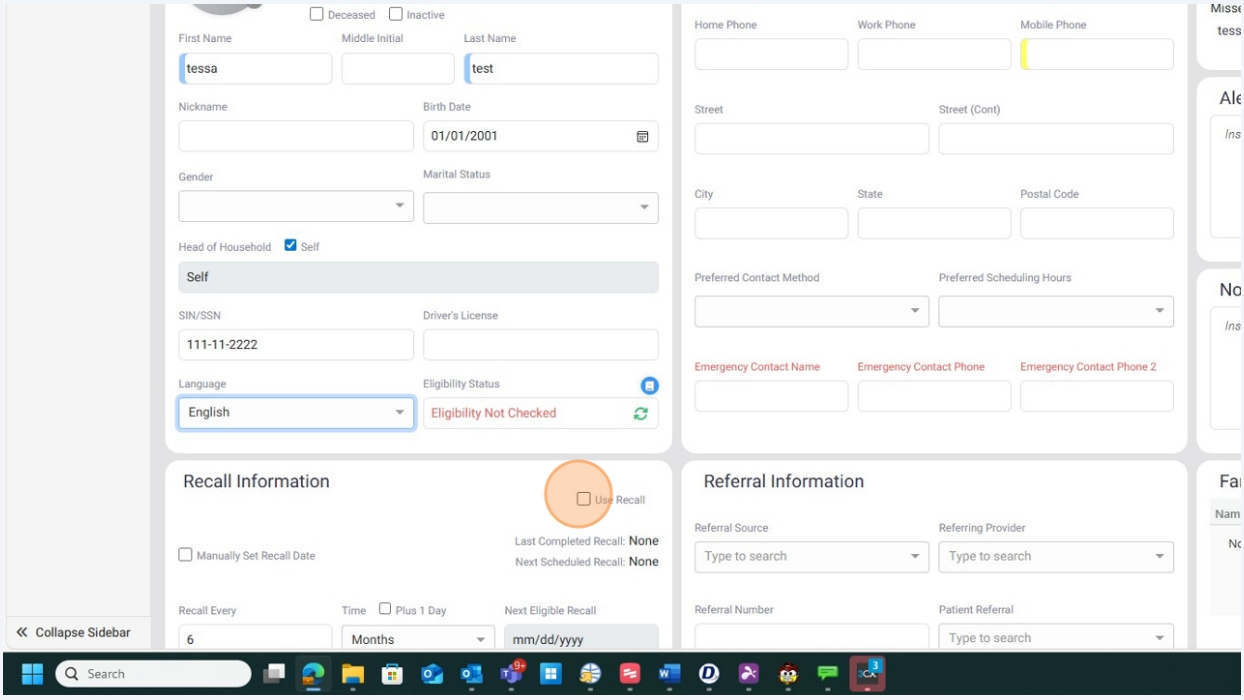
2 Click "green +" to complete patient profile



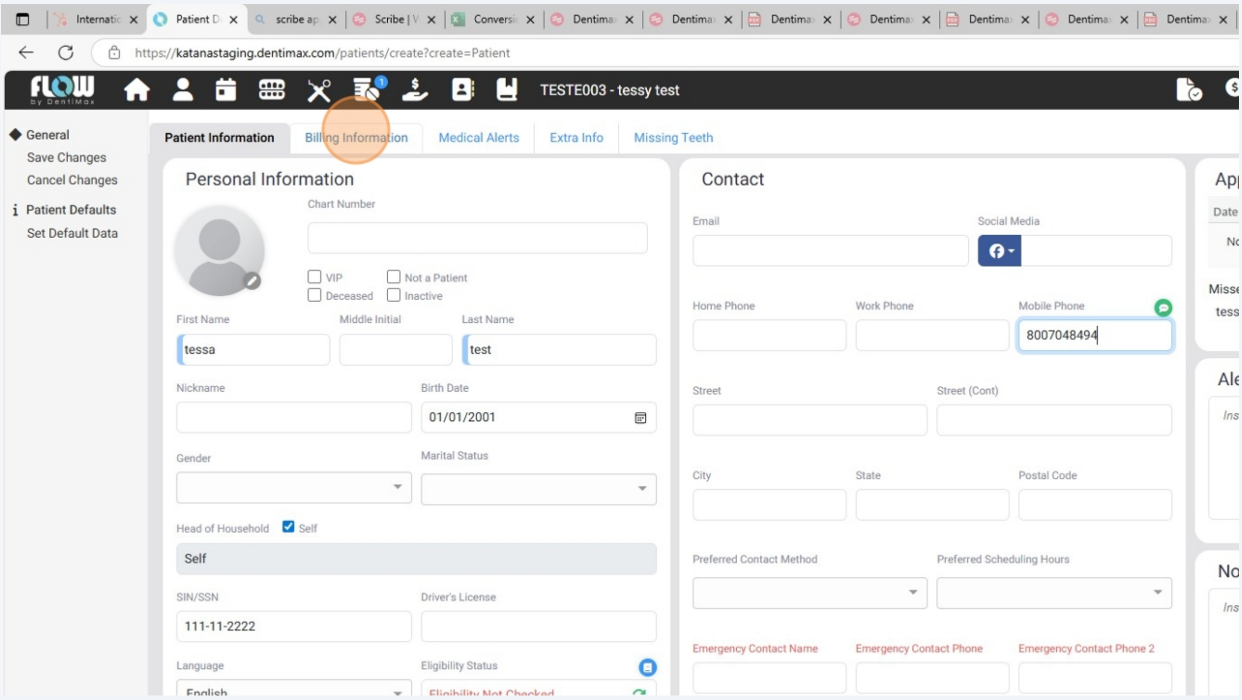
3 Complete all patient information



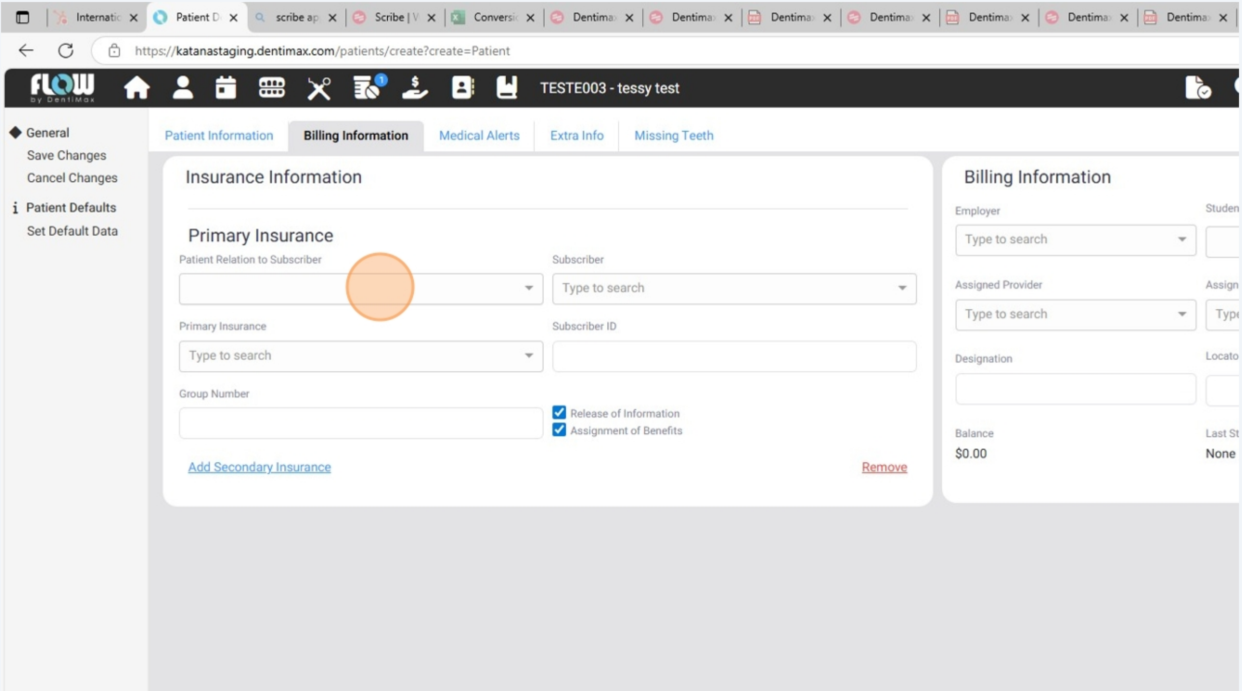
4 Click "Use Recall" for all hygiene patients



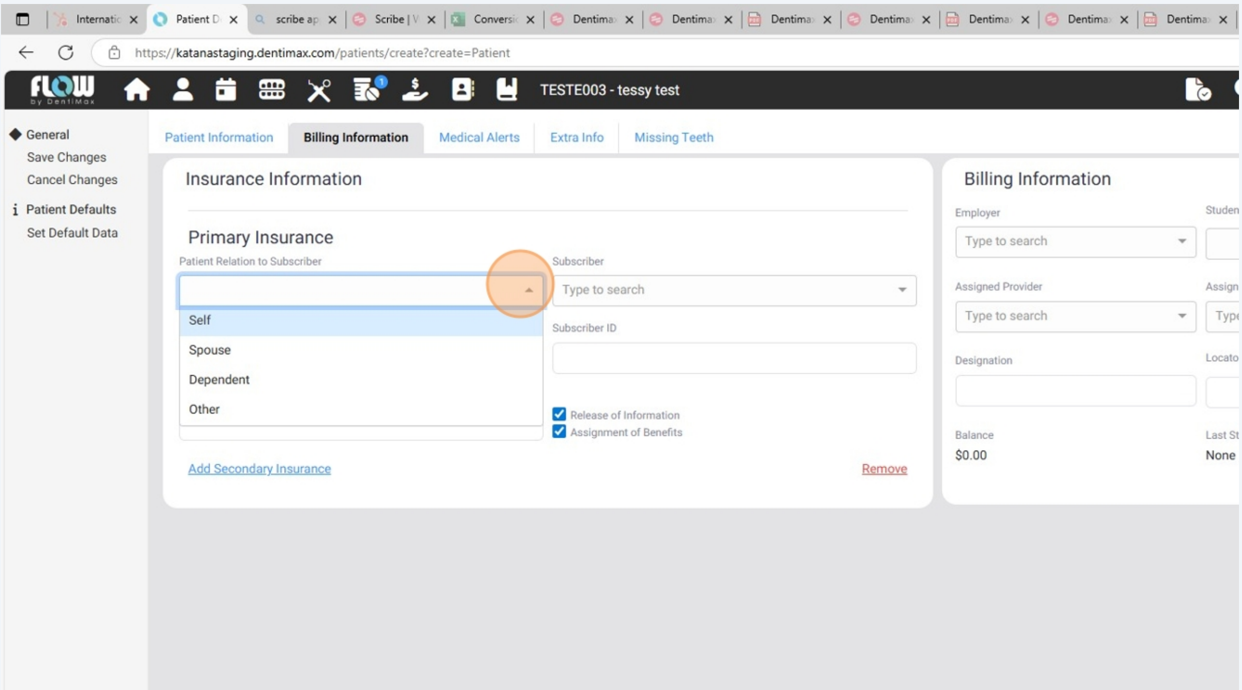
5 Click "Billing Information" for patient insurance



6 Enter insurance information as needed

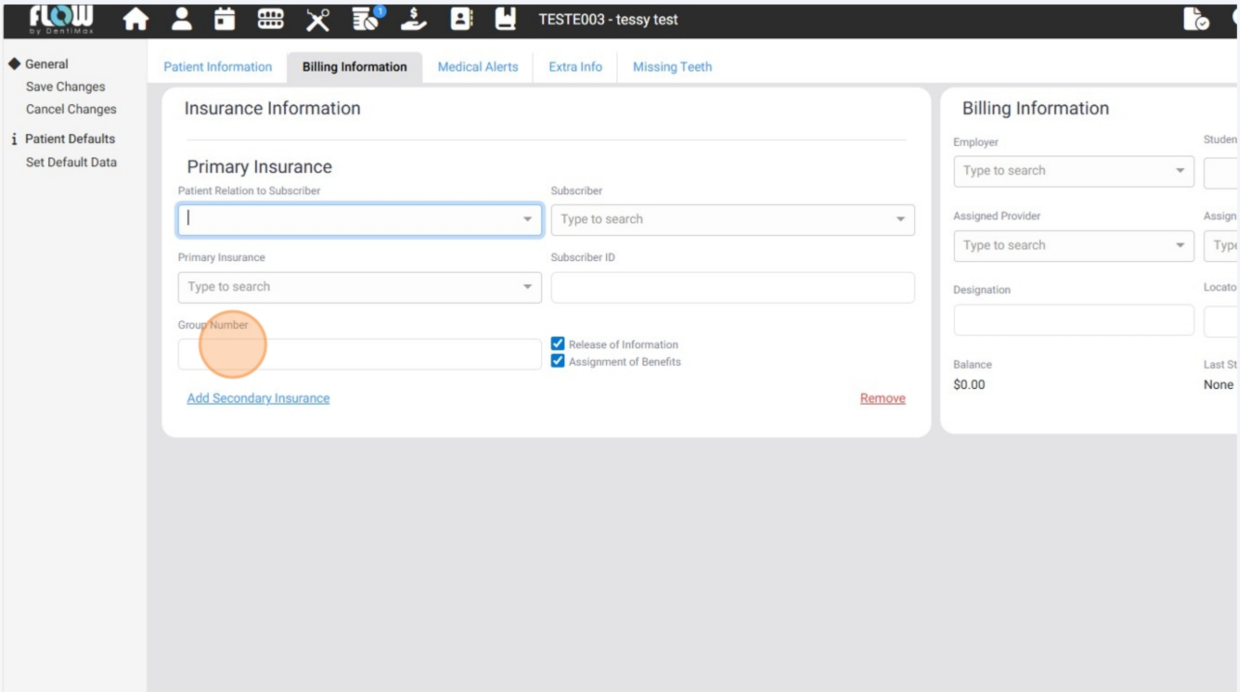


7 Click here



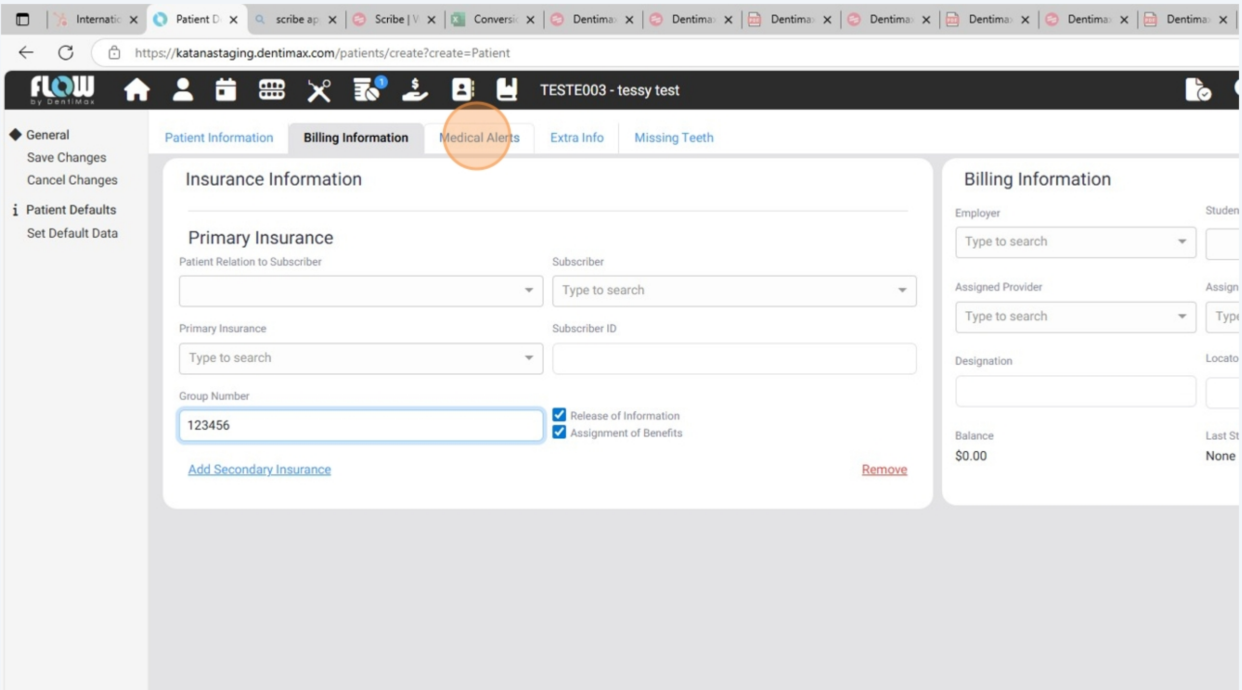
8

Be sure to complete "Group Number" on all insurance information; this will direct the correct insurance information throughout the patient account.

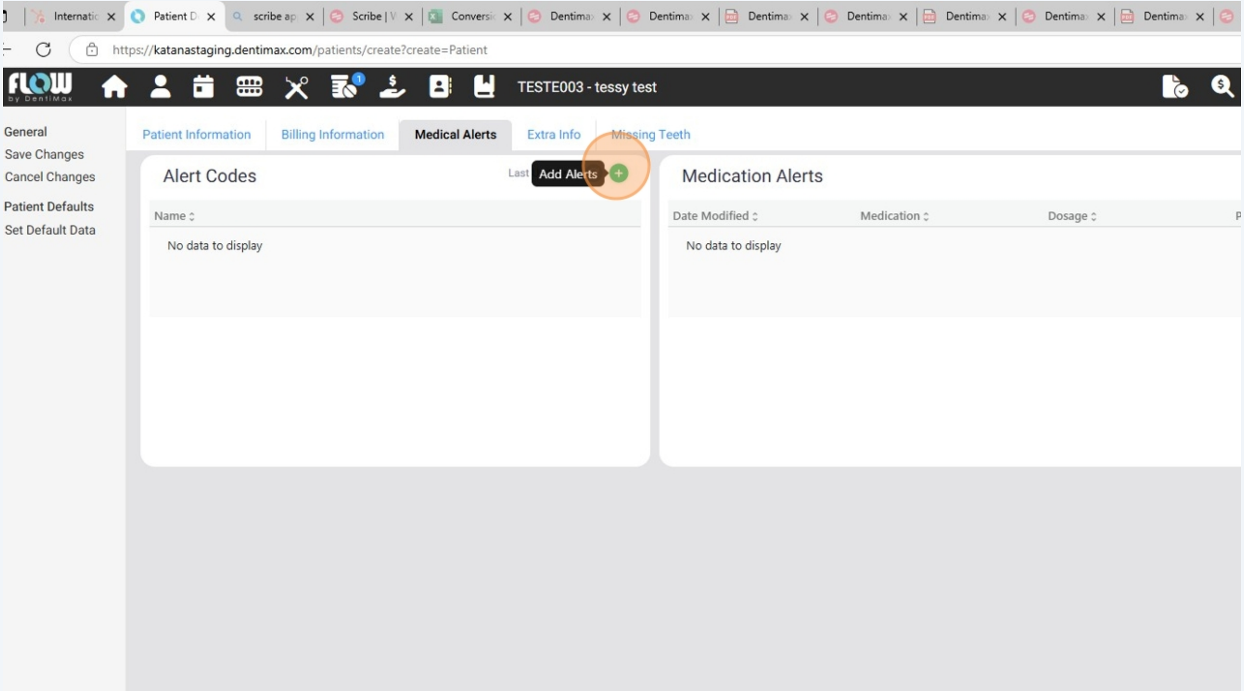


9

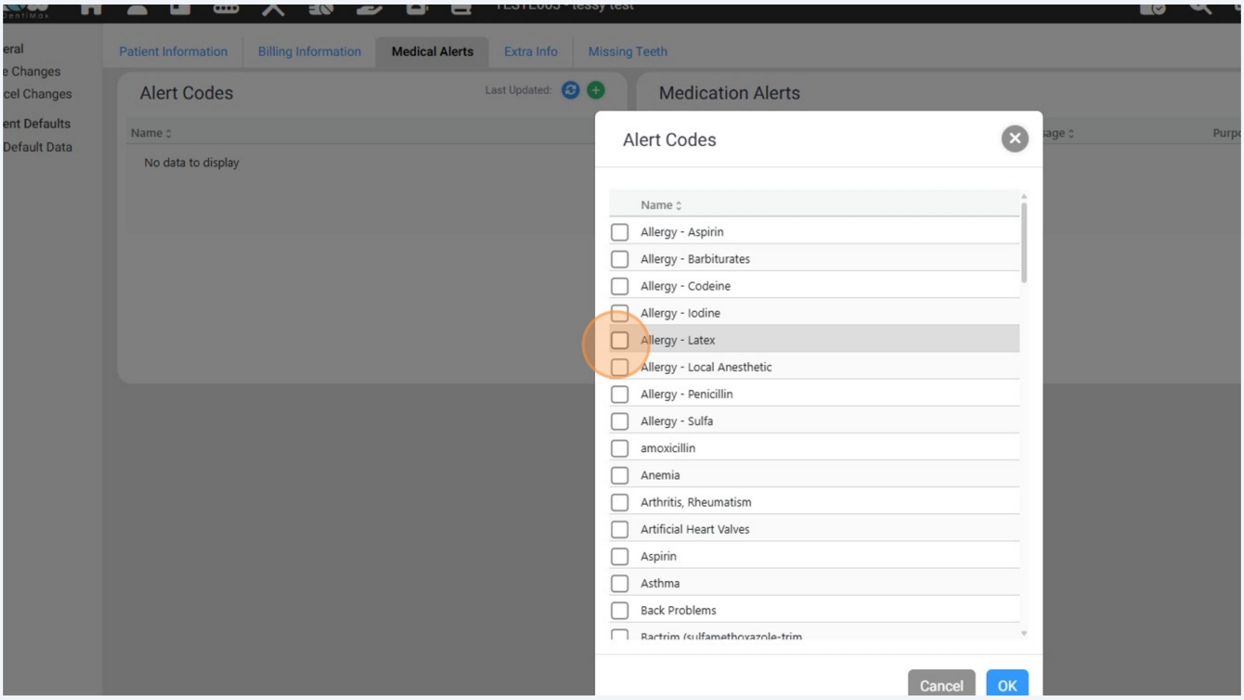
Click "Medical Alerts"



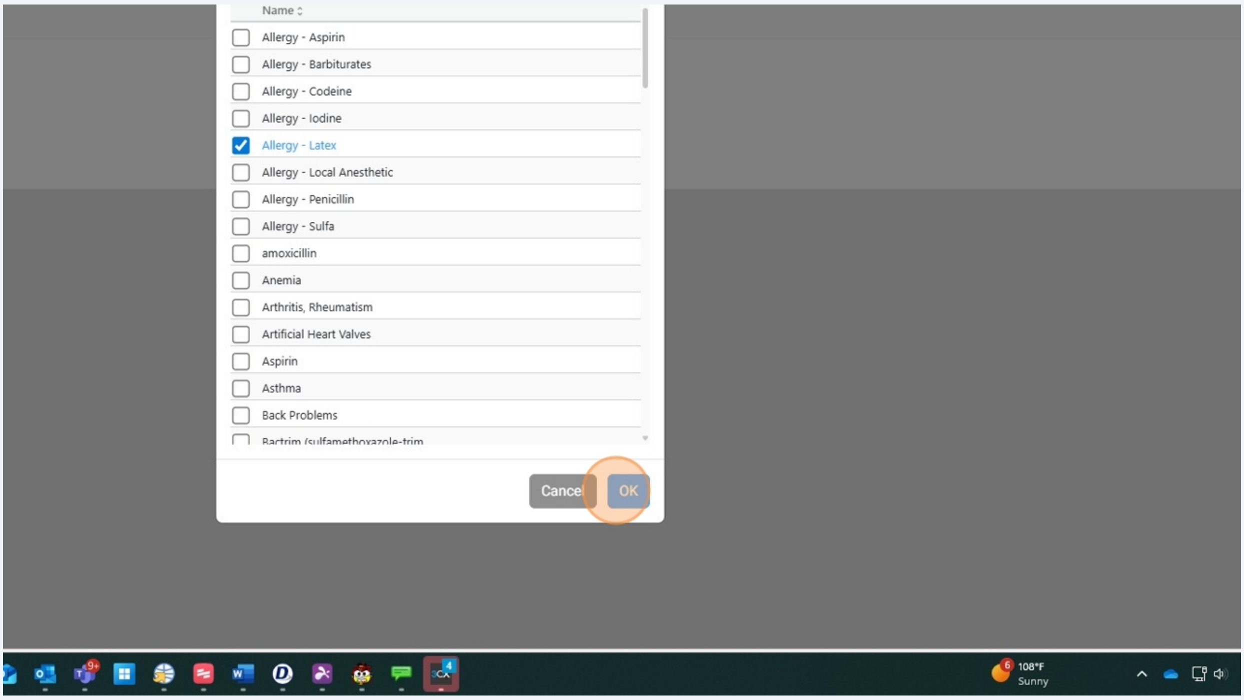
10 Click "green +" to enter any medical alerts



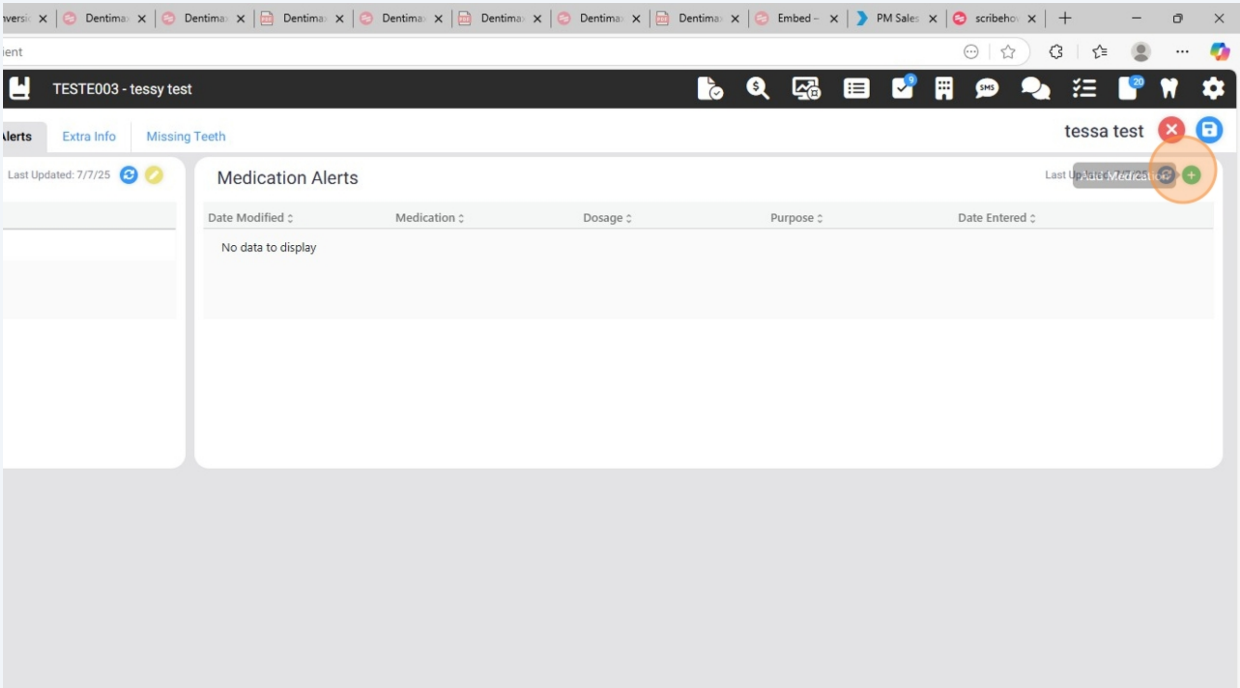
11 Select all applicable



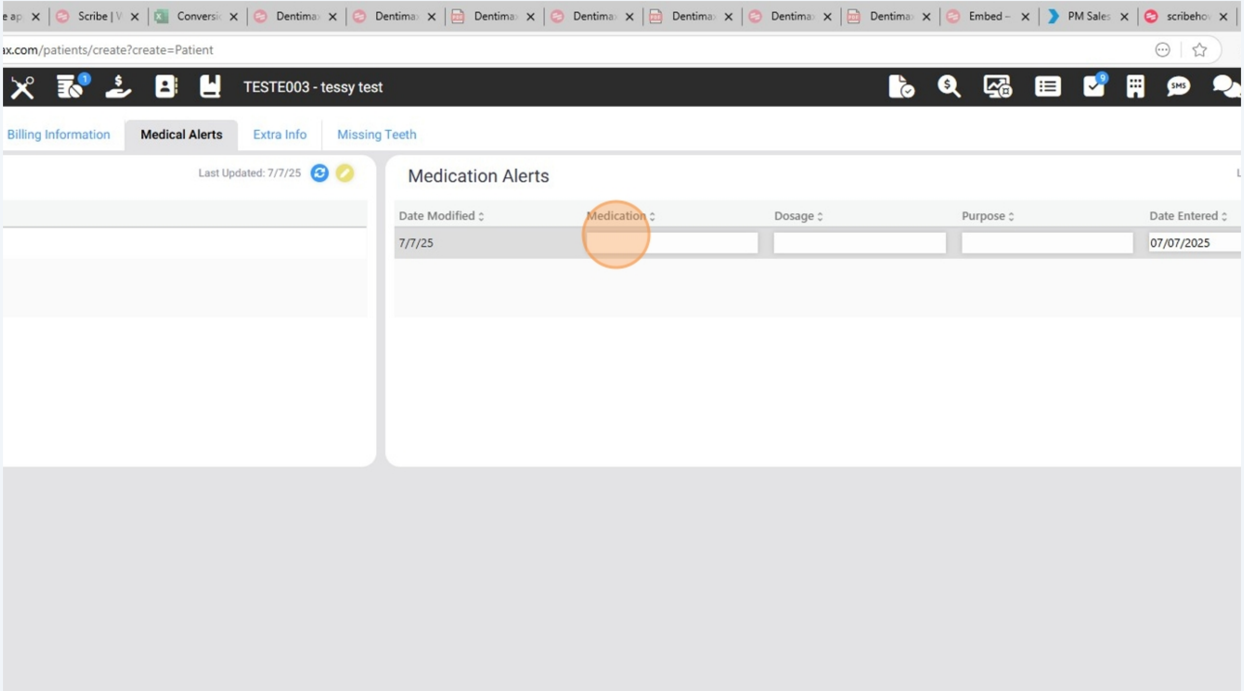
12 Click "OK"



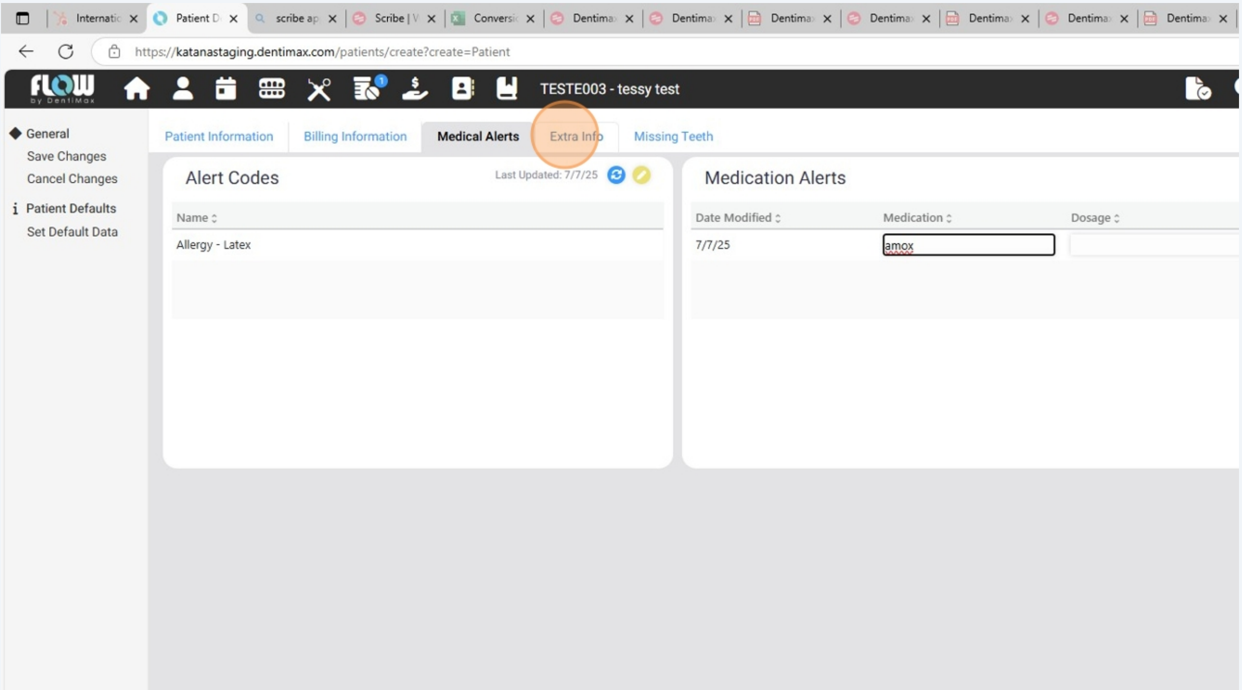
13 To enter Medication Alerts click "green +"



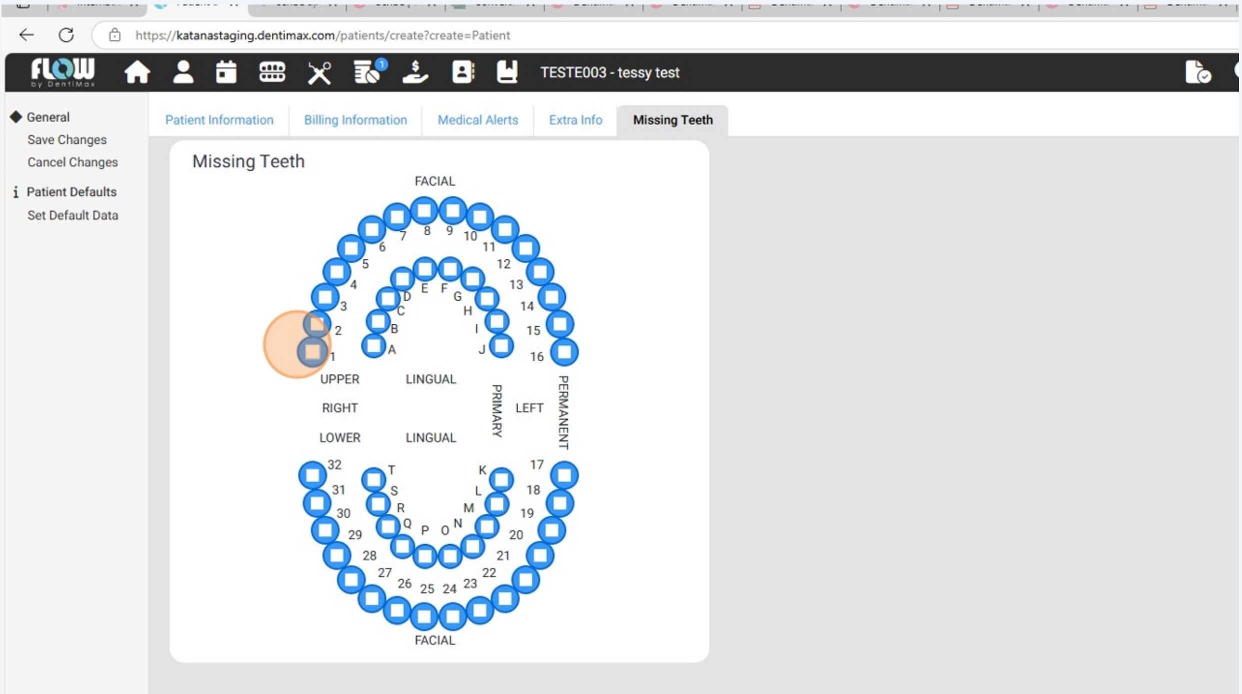
14 Enter medications as listed from patient



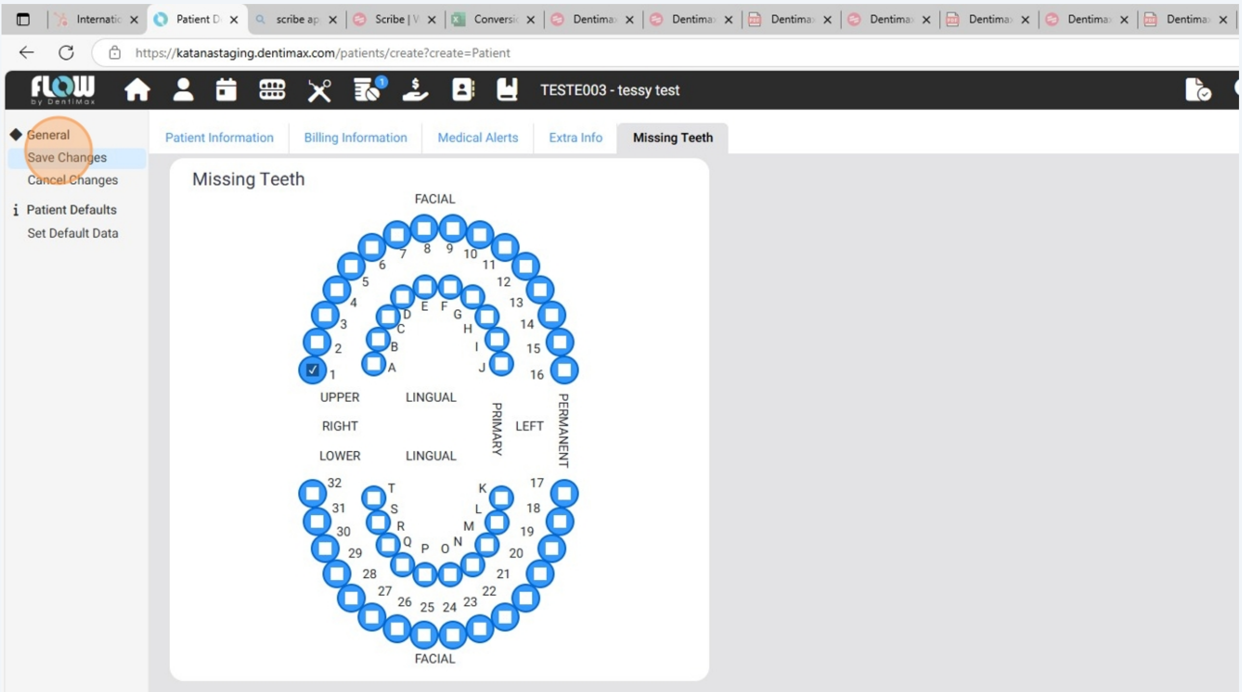
15 Extra Info tab can be used per office preference



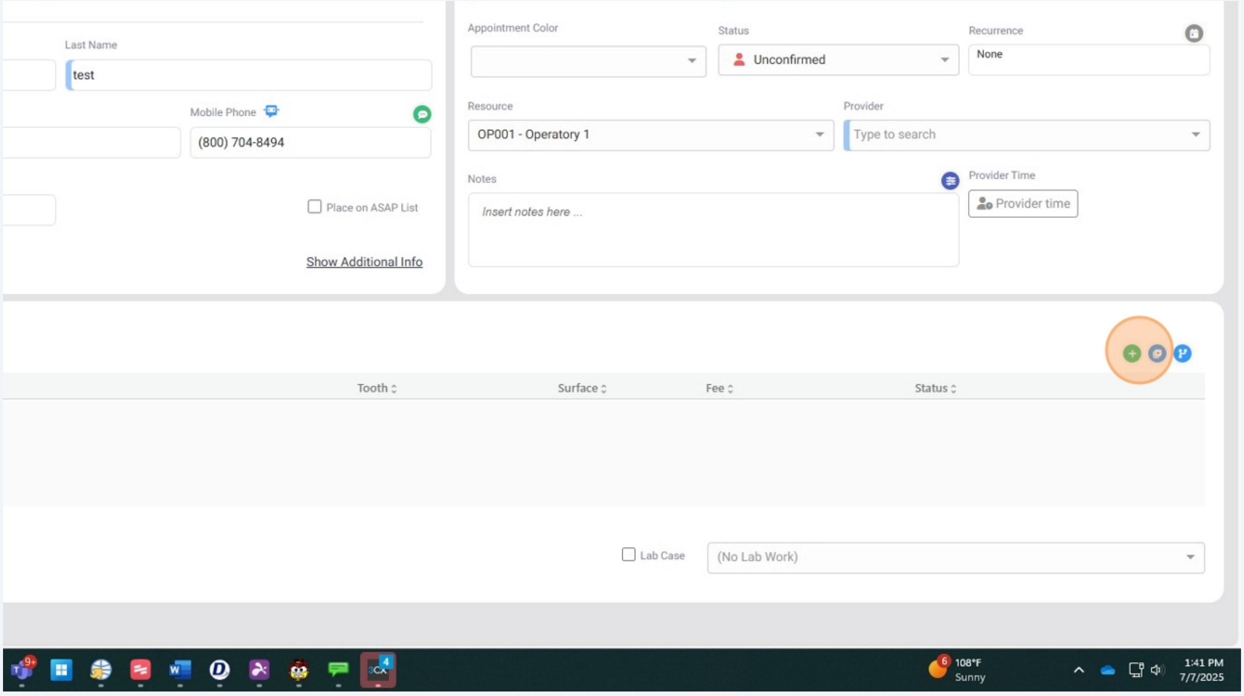
16 Missing Teeth tab is office preference. Missing teeth can also be documented in patient charting



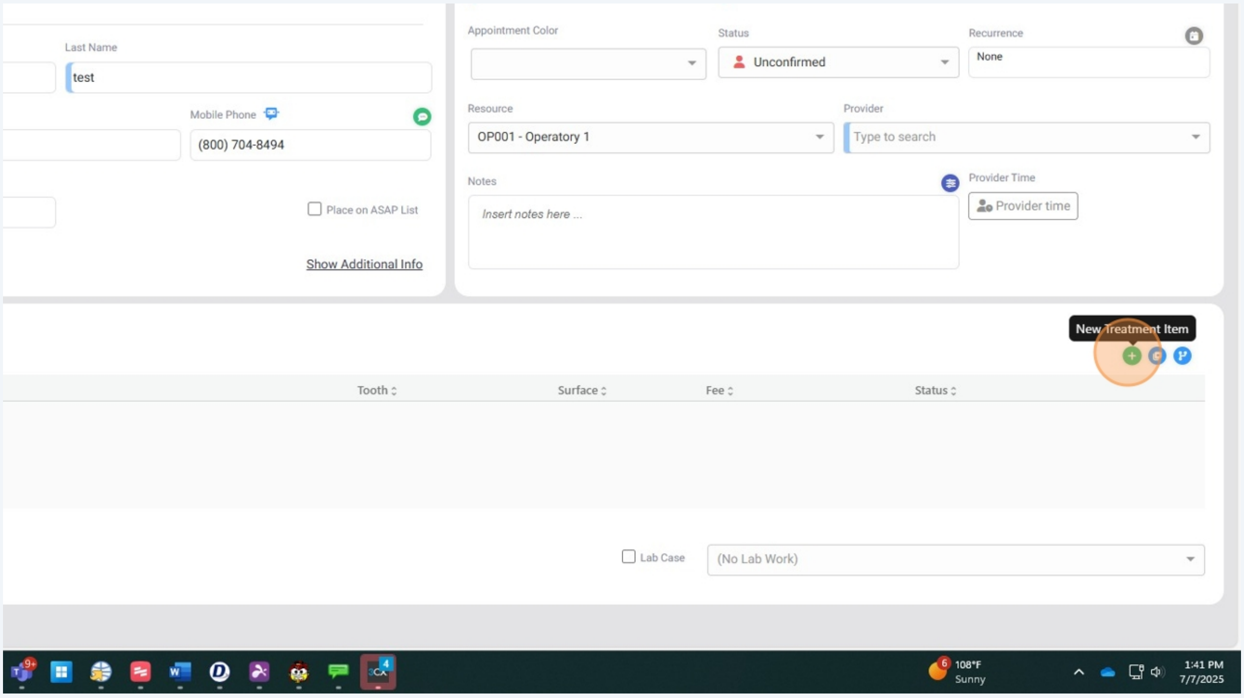
17 Click "Save Changes" when you have completed all patient profile information.



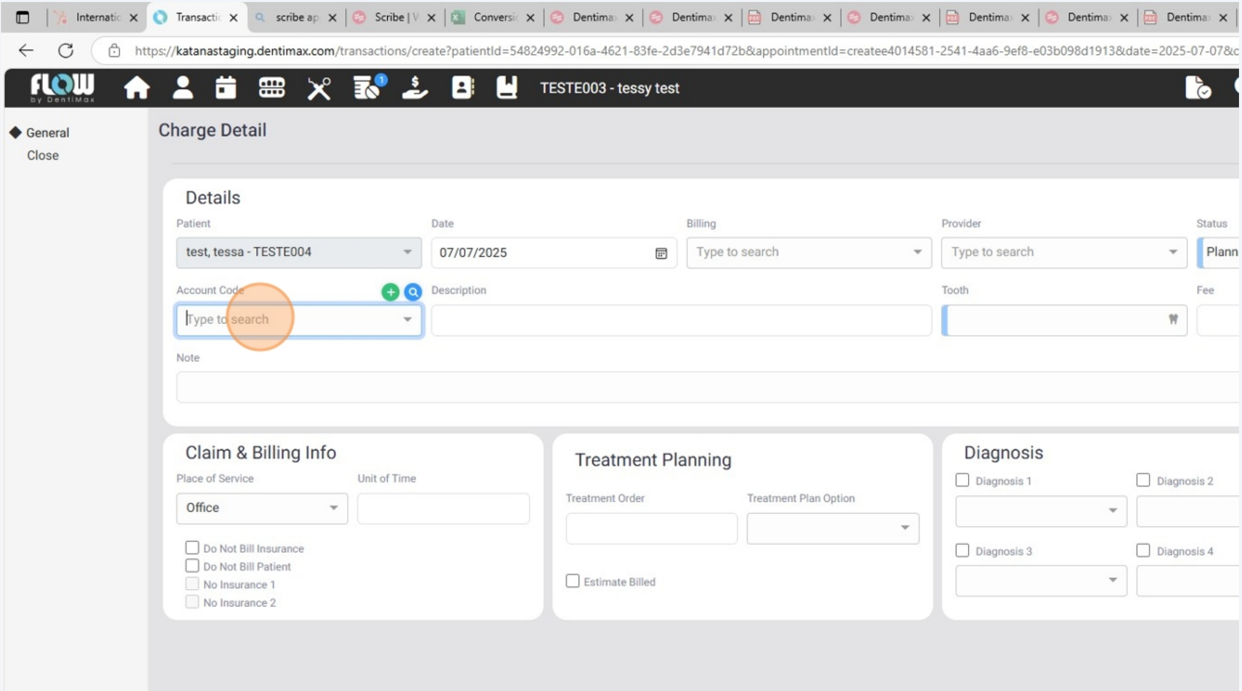
18 You will be back in the Appointment Details screen; this is where you will attach procedures to the selected appointment.



19 In the lower section you will have 3 options to add treatment to the appointment. The Green +, to add procedure codes. The blue + folder, to add procedures from treatment plan. The Blue "multi file", to add Multicode procedures.

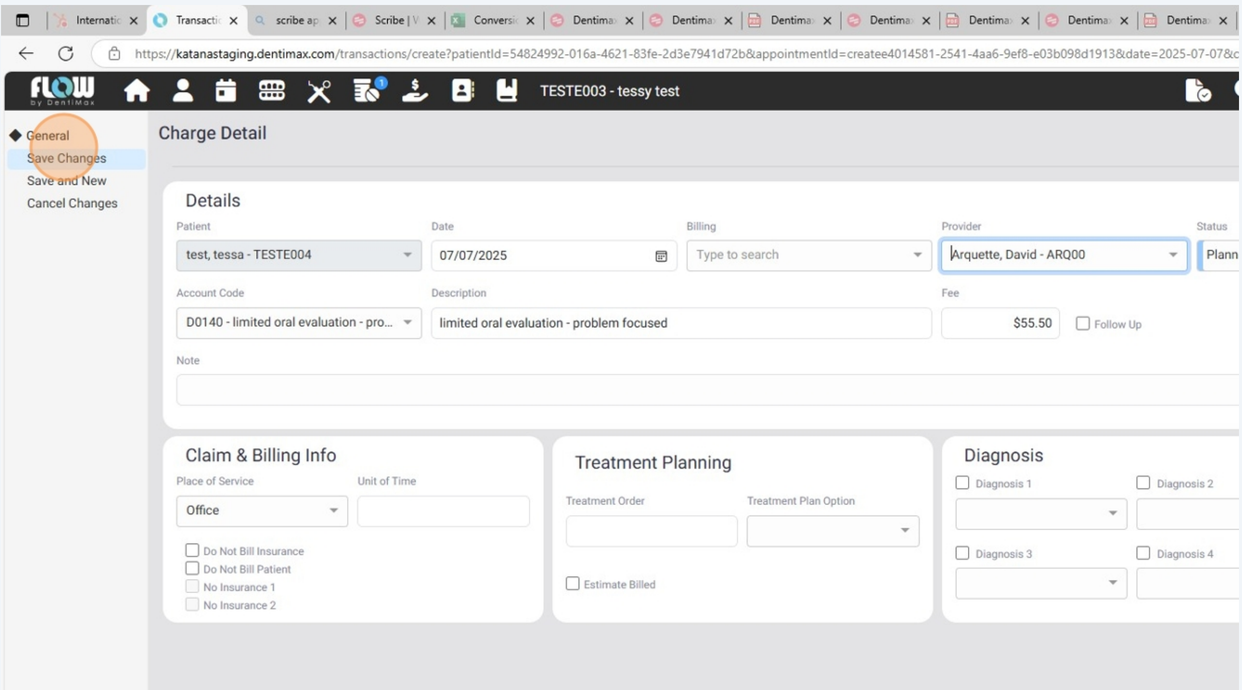


20 Click Green +; enter procedure code and select provider

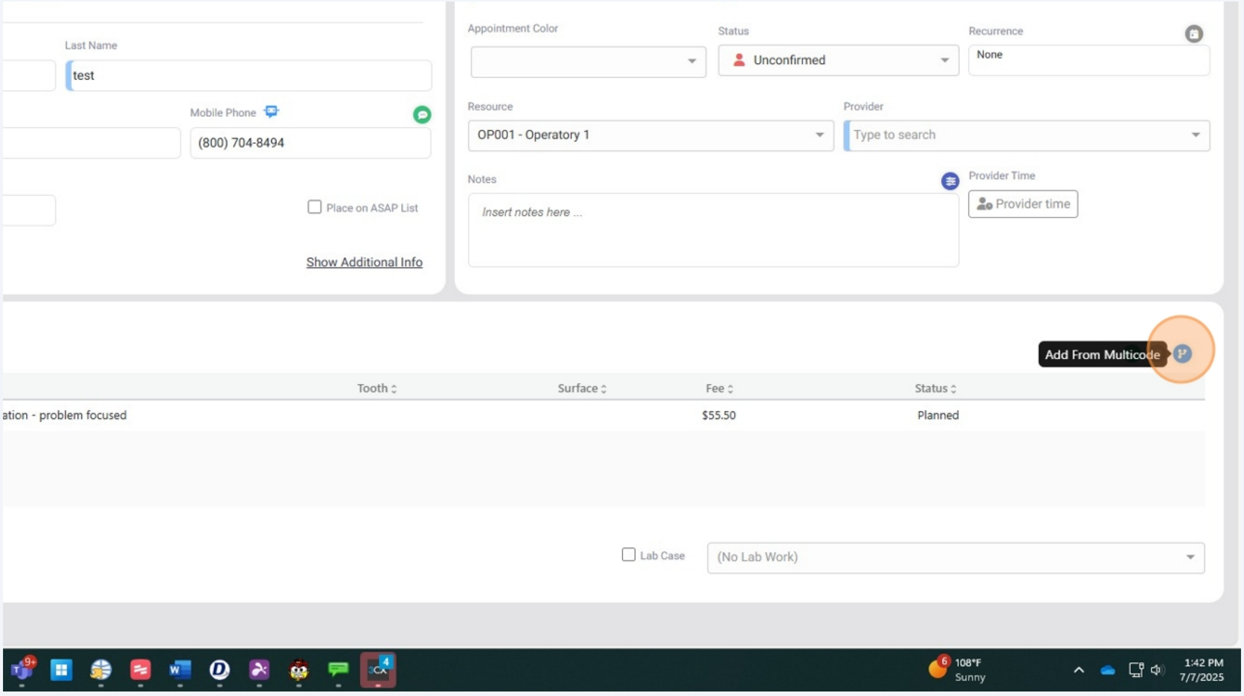


21 If you only are adding one procedure to the appointment, click Save Changes.

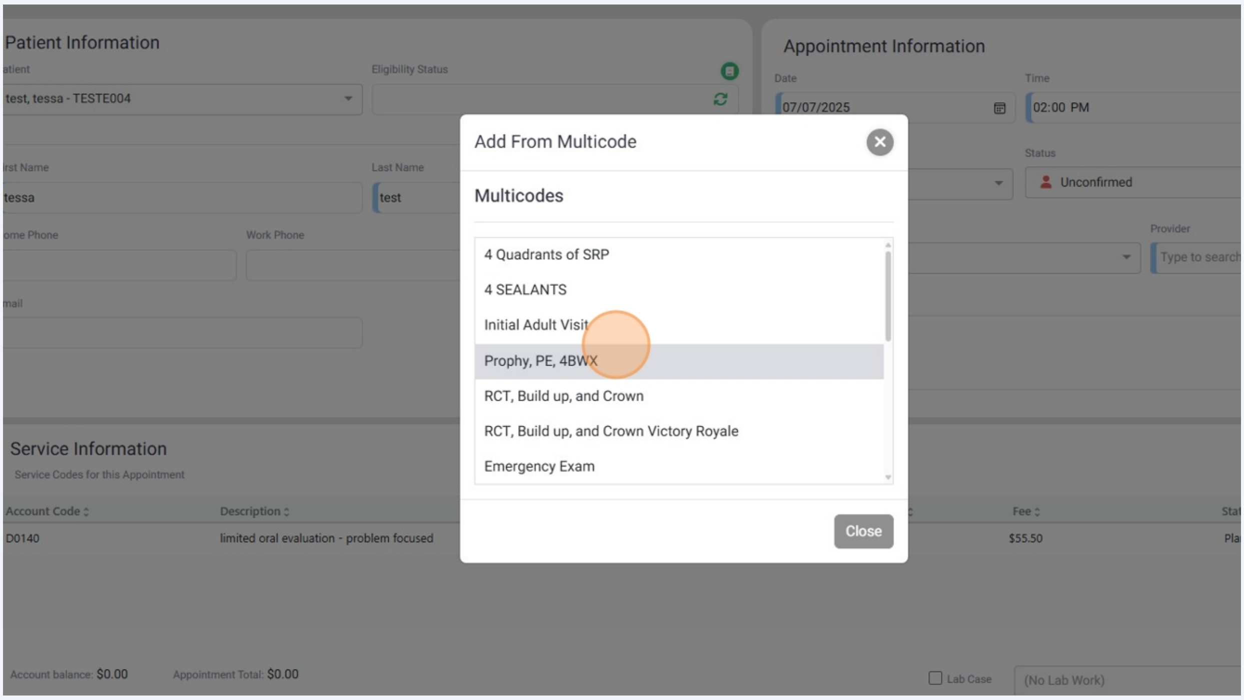
If you are adding multiple procedures, click Save and New, and repeat the process for all procedures needed; then click Save Changes



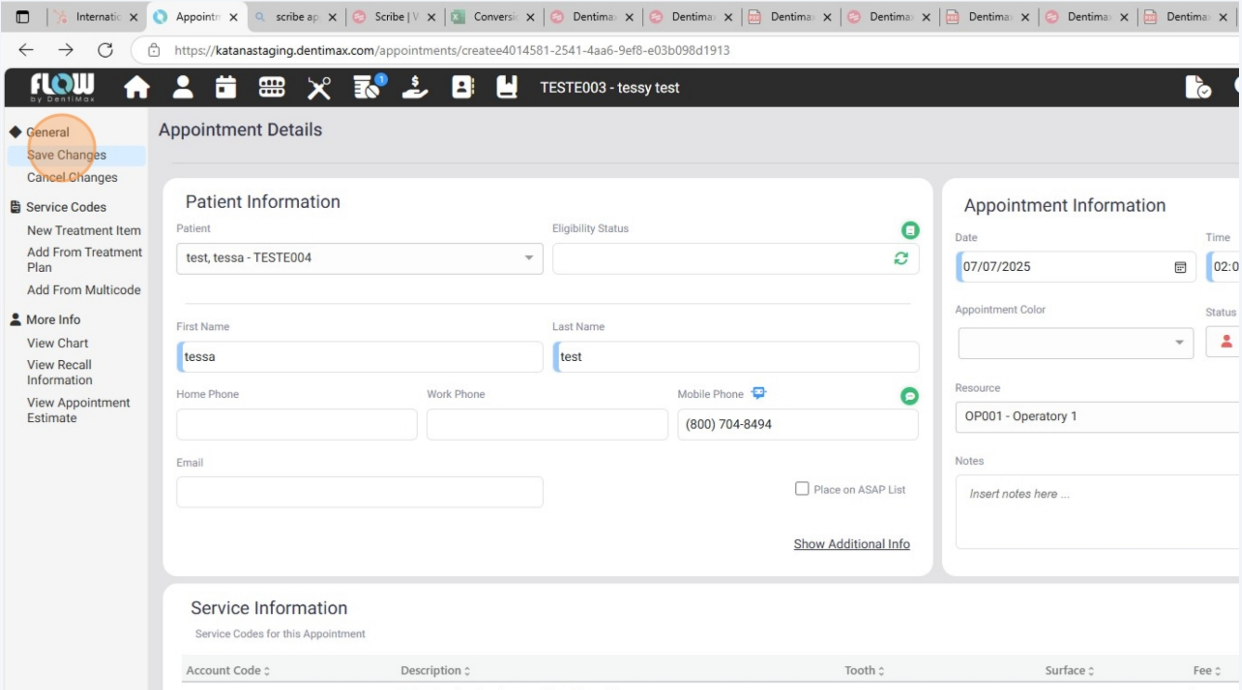
22 If you click the MultiCode button, you will be given a list of the Multicodes the office has set up. This will allow you to select one code that has multiple codes attached to it, this is to save time from entering each individual code as previously done.



23 example



24 When you are done entering all procedures attached to the appointment, click "Save Changes"



25 You will see the complete appointment on the schedule at your selected time.