

# Creating NEW PATIENT APPOINTMENT WITH PATIENT PROFILE

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## 1 Select appointment time

The screenshot displays a medical scheduling software interface. On the left, a sidebar menu includes options like 'Manage Appts', 'Appointment List', 'Create Appts', and 'Find Open Time Slot'. The main area shows a vertical time scale from 8:30 AM to 4:30 PM. A red horizontal line is positioned at 2:00 PM, with an orange circle highlighting this time slot. Below the 2:00 PM slot, a patient appointment is listed: 'Tx tassy test' with 'D0140' and 'Chart Number: TESTE003'. A grey 'Lunch' block is visible between 12:00 PM and 1:00 PM. At the bottom, there is a 'Template Mode' toggle and a 'View: Opt 1' dropdown. The Windows taskbar is visible at the very bottom of the screen.

## 2 Click "green +" to complete patient profile

Appointment Entry

**Patient Information**

Patient

Search for an existing patient

New

First Name Last Name

Home Phone Work Phone Mobile Phone

Email  Place on ASAP List

[Hide Additional Info](#)

**Appointment Information**

Date Time

07/07/2025 02:00

Appointment Color Status

Resource

OP001 - Operatory 1

Notes

Insert notes here ...

**Additional Information**

Birth Date Language

mm/dd/yyyy

Address City State Zip

## 3 Complete all patient information

Patient Information 4 Billing Information Medical Alerts Extra Info Missing Teeth

**Personal Information**

Chart Number

First Name Middle Initial Last Name

Nickname Birth Date

mm/dd/yyyy

Gender Marital Status

Head of Household  Self

SIN/SSN Driver's License

Language Eligibility Status

Eligibility Not Checked

**Contact**

Email Social Media

Home Phone Work Phone Mobile Phone

Street Street (Cont)

City State Postal Code

Preferred Contact Method Preferred Scheduling Hours

Emergency Contact Name Emergency Contact Phone Emergency Contact Phone 2

#### 4 Click "Use Recall" for all hygiene patients

This screenshot shows a patient record form in a desktop application. The form is divided into several sections: Personal Information, Contact Information, Recall Information, and Referral Information. The 'Use Recall' button is highlighted with an orange circle. The 'Eligibility Status' is 'Eligibility Not Checked'. The 'Recall Information' section shows 'Recall Every' set to 6 months and 'Next Eligible Recall' set to mm/dd/yyyy. The 'Referral Information' section has dropdown menus for 'Referral Source' and 'Referring Provider'.

Deceased  Inactive

First Name: tessa Middle Initial: Last Name: test

Nickname: Birth Date: 01/01/2001

Gender: Marital Status:

Head of Household  Self

SIN/SSN: 111-11-2222 Driver's License:

Language: English Eligibility Status: Eligibility Not Checked

Home Phone: Work Phone: Mobile Phone: 8007048494

Street: Street (Cont):

City: State: Postal Code:

Preferred Contact Method: Preferred Scheduling Hours:

Emergency Contact Name: Emergency Contact Phone: Emergency Contact Phone 2:

Recall Information

Manually Set Recall Date

Last Completed Recall: None Next Scheduled Recall: None

Recall Every: 6 Time:  Plus 1 Day Next Eligible Recall: mm/dd/yyyy

Referral Information

Referral Source: Referring Provider:

Referral Number: Patient Referral:

#### 5 Click "Billing Information" for patient insurance

This screenshot shows a patient record form in a web browser. The 'Billing Information' tab is highlighted with an orange circle. The form is divided into several sections: Personal Information, Contact Information, and Billing Information. The 'Billing Information' section is currently empty. The 'Eligibility Status' is 'Eligibility Not Checked'. The 'Recall Information' section shows 'Recall Every' set to 6 months and 'Next Eligible Recall' set to mm/dd/yyyy. The 'Referral Information' section has dropdown menus for 'Referral Source' and 'Referring Provider'.

Chart Number:

VIP  Not a Patient  Deceased  Inactive

First Name: tessa Middle Initial: Last Name: test

Nickname: Birth Date: 01/01/2001

Gender: Marital Status:

Head of Household  Self

SIN/SSN: 111-11-2222 Driver's License:

Language: English Eligibility Status: Eligibility Not Checked

Email: Social Media: Facebook

Home Phone: Work Phone: Mobile Phone: 8007048494

Street: Street (Cont):

City: State: Postal Code:

Preferred Contact Method: Preferred Scheduling Hours:

Emergency Contact Name: Emergency Contact Phone: Emergency Contact Phone 2:

Patient Information Billing Information Medical Alerts Extra Info Missing Teeth

Personal Information Contact

## 6 Enter insurance information as needed

The screenshot shows the 'Insurance Information' section of a patient form. The 'Patient Relation to Subscriber' dropdown menu is highlighted with an orange circle. The form includes fields for 'Subscriber' (with a search box), 'Primary Insurance' (with a search box), and 'Subscriber ID'. There are also checkboxes for 'Release of Information' and 'Assignment of Benefits'. A 'Remove' button is visible at the bottom right of the section. The 'Billing Information' section is partially visible on the right, showing fields for 'Employer', 'Assigned Provider', 'Designation', 'Balance', and 'Last St'.

## 7 Click here

The screenshot shows the 'Insurance Information' section of a patient form. The 'Patient Relation to Subscriber' dropdown menu is open, showing options: 'Self', 'Spouse', 'Dependent', and 'Other'. An orange circle highlights the dropdown menu. The form includes fields for 'Subscriber' (with a search box), 'Primary Insurance' (with a search box), and 'Subscriber ID'. There are also checkboxes for 'Release of Information' and 'Assignment of Benefits'. A 'Remove' button is visible at the bottom right of the section. The 'Billing Information' section is partially visible on the right, showing fields for 'Employer', 'Assigned Provider', 'Designation', 'Balance', and 'Last St'.

8

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

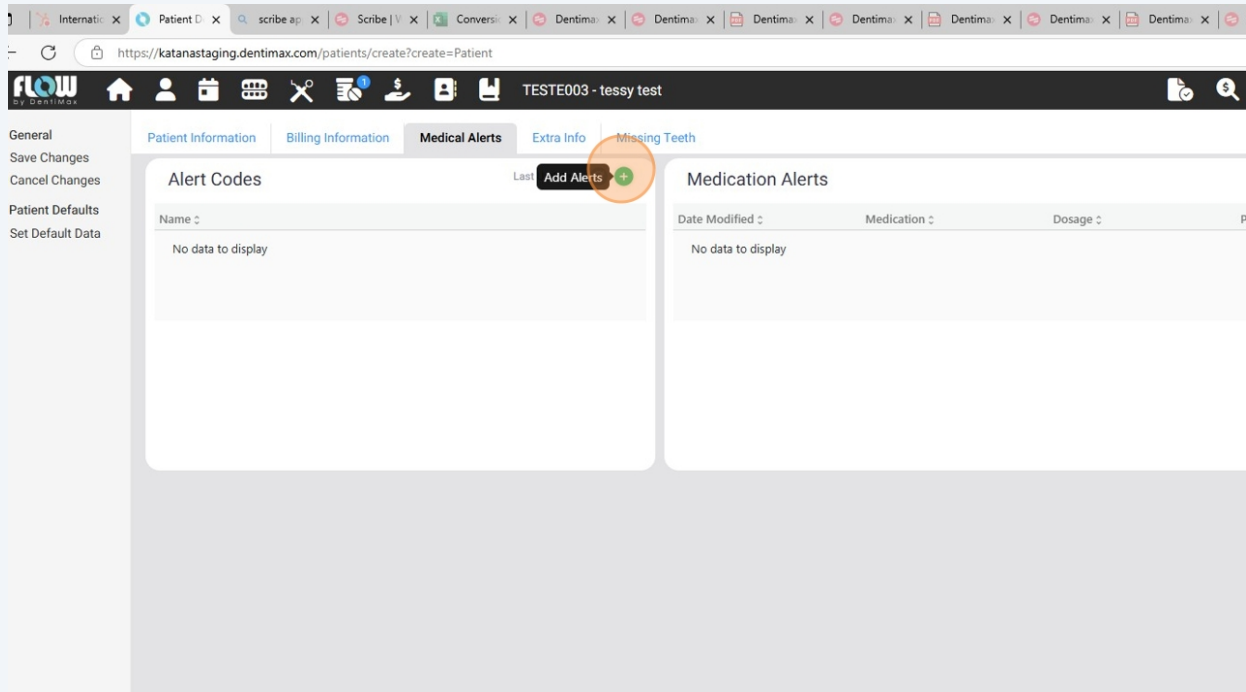
The screenshot shows the 'Insurance Information' form within the 'Billing Information' tab. The form includes fields for 'Patient Relation to Subscriber', 'Subscriber', 'Primary Insurance', and 'Subscriber ID'. The 'Group Number' field is highlighted with an orange circle. Below the 'Group Number' field, there are two checked checkboxes: 'Release of Information' and 'Assignment of Benefits'. A 'Remove' button is visible at the bottom right of the form. The 'Billing Information' tab on the right contains fields for 'Employer', 'Assigned Provider', 'Designation', and 'Balance'.

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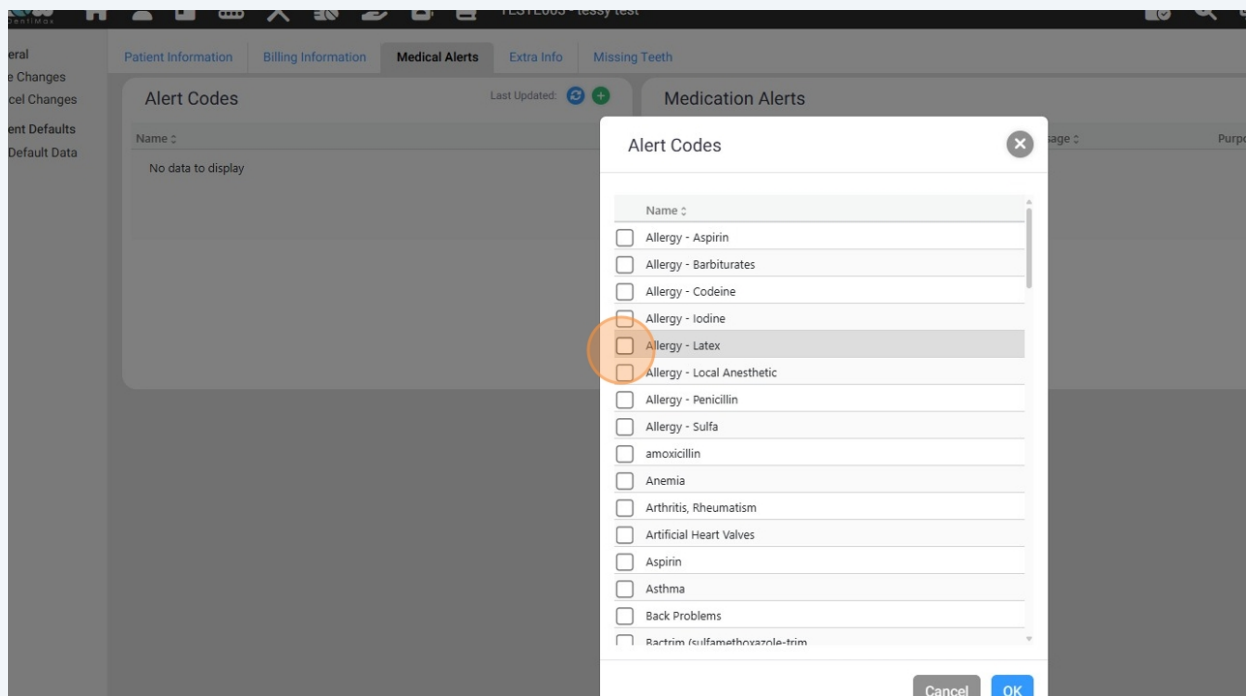
Click "Medical Alerts"

The screenshot shows the 'Insurance Information' form within the 'Medical Alerts' tab. The 'Medical Alerts' tab is highlighted with an orange circle. The 'Group Number' field is now filled with the value '123456'. The 'Billing Information' tab on the right contains fields for 'Employer', 'Assigned Provider', 'Designation', and 'Balance'.

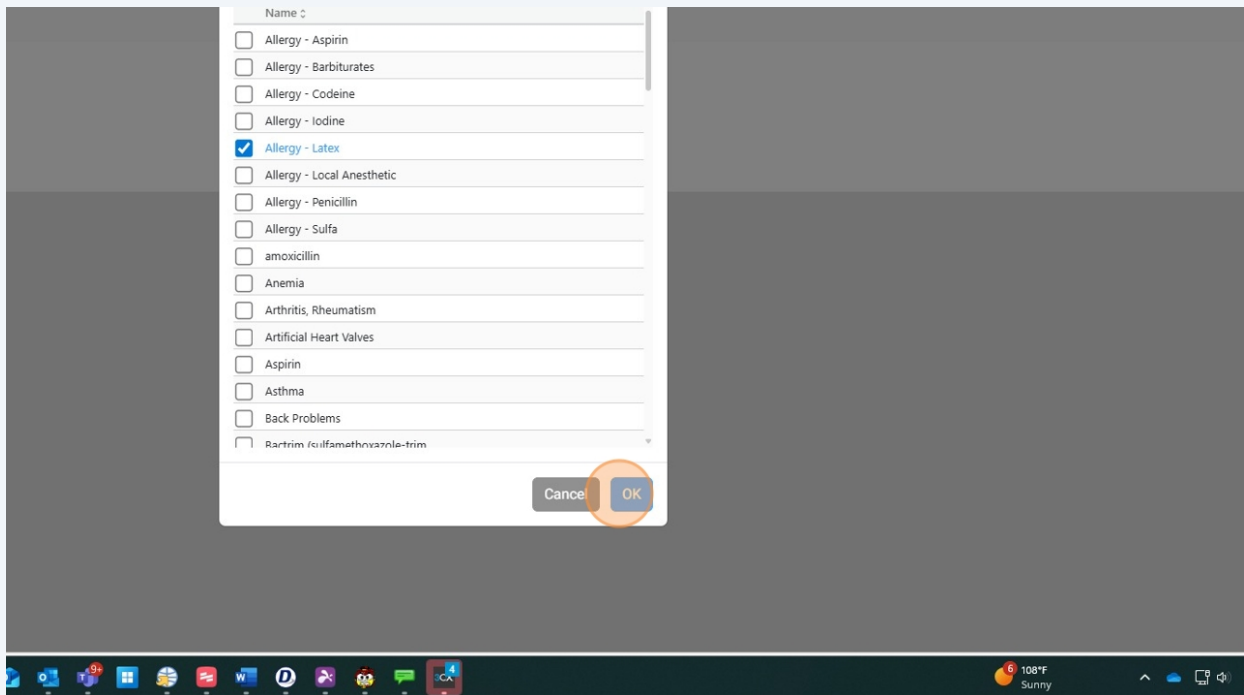
## 10 Click "green +" to enter any medical alerts



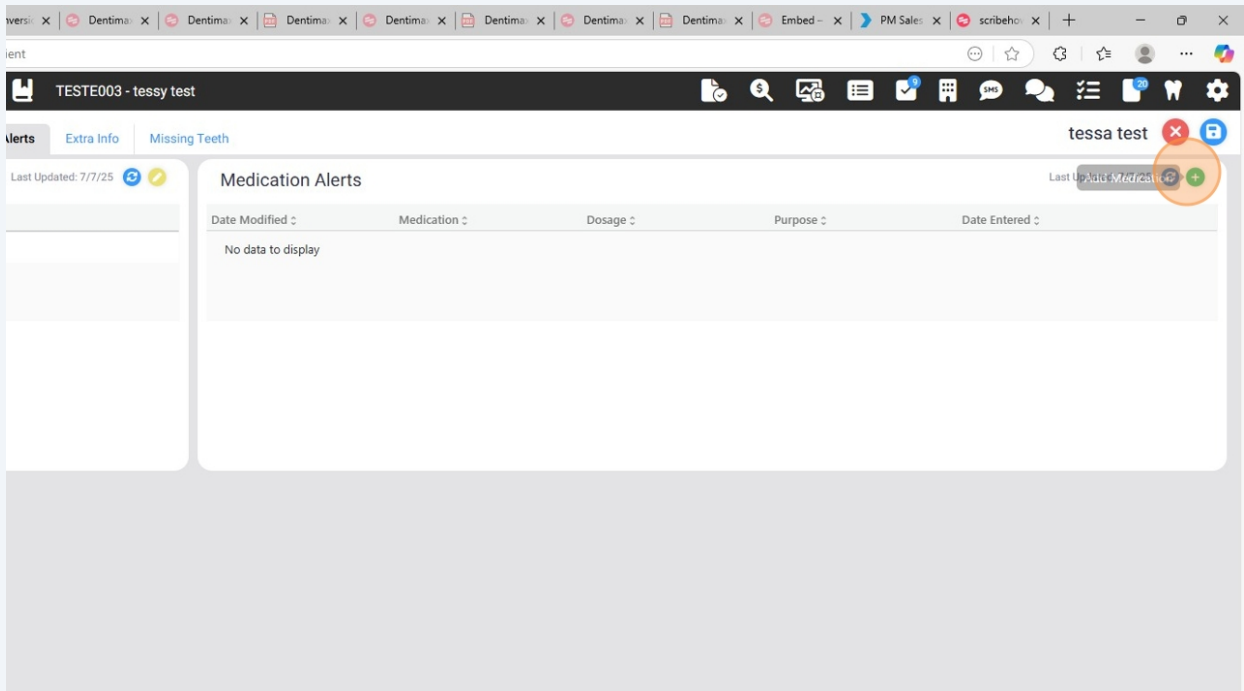
## 11 Select all applicable



## 12 Click "OK"



## 13 To enter Medication Alerts click "green +"



## 14 Enter medications as listed from patient

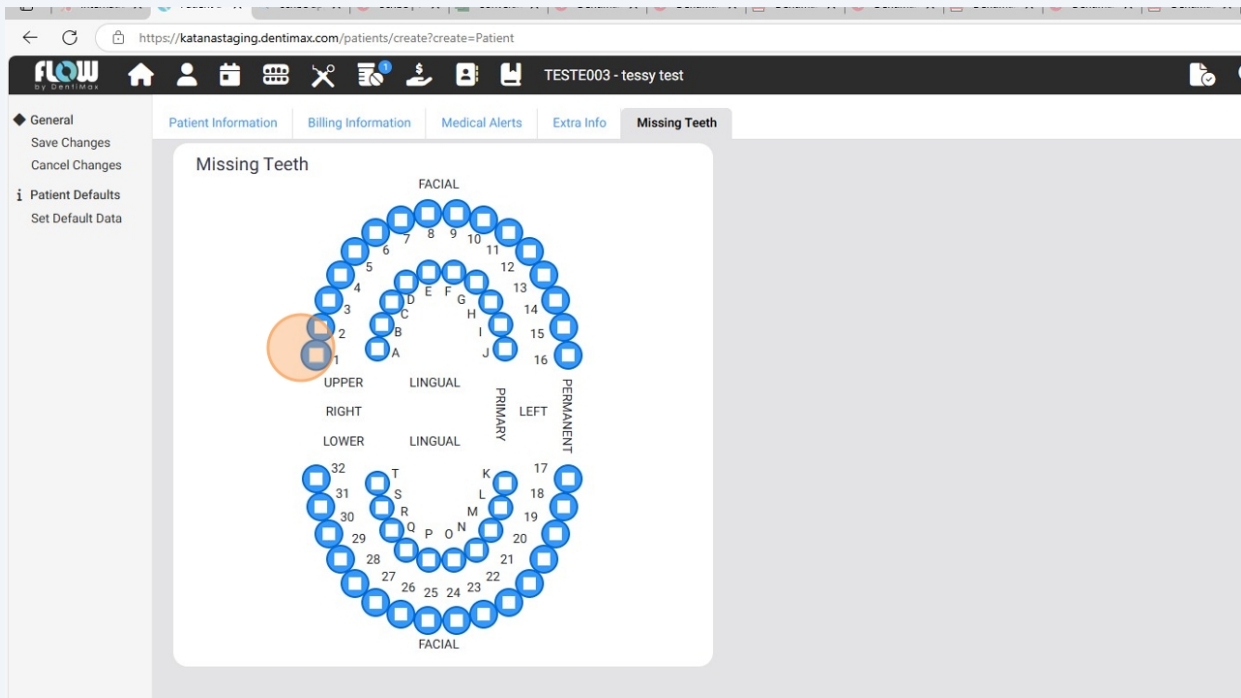
The screenshot shows a web browser window with multiple tabs. The active tab is titled "TESTE003 - tussy test". The URL is "ix.com/patients/create?create=Patient". The interface has a top navigation bar with icons for various functions. Below the navigation bar, there are tabs for "Billing Information", "Medical Alerts", "Extra Info", and "Missing Teeth". The "Medical Alerts" tab is selected. It displays a table with the following columns: "Date Modified", "Medication", "Dosage", "Purpose", and "Date Entered". The first row contains the date "7/7/25" in the "Date Modified" column and "07/07/2025" in the "Date Entered" column. The "Medication" column is highlighted with an orange circle.

## 15 Extra Info tab can be used per office preference

The screenshot shows a web browser window with multiple tabs. The active tab is titled "TESTE003 - tussy test". The URL is "https://katanastaging.dentimax.com/patients/create?create=Patient". The interface has a top navigation bar with icons for various functions. Below the navigation bar, there are tabs for "Patient Information", "Billing Information", "Medical Alerts", "Extra Info", and "Missing Teeth". The "Extra Info" tab is selected and highlighted with an orange circle. It displays a form with the following sections: "Alert Codes" and "Medication Alerts". The "Alert Codes" section has a "Name" field with the value "Allergy - Latex". The "Medication Alerts" section has a table with the following columns: "Date Modified", "Medication", and "Dosage". The first row contains the date "7/7/25" in the "Date Modified" column and "amox" in the "Medication" column. The "Medication" field is highlighted with a black box.

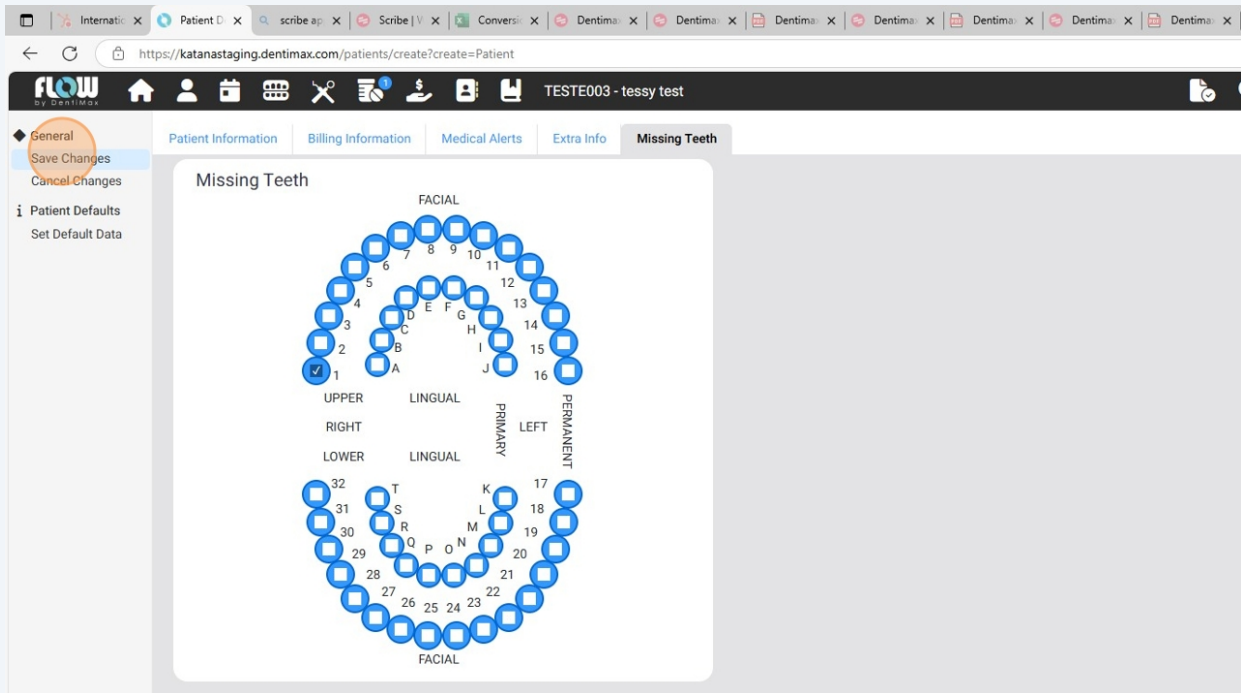
16

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.

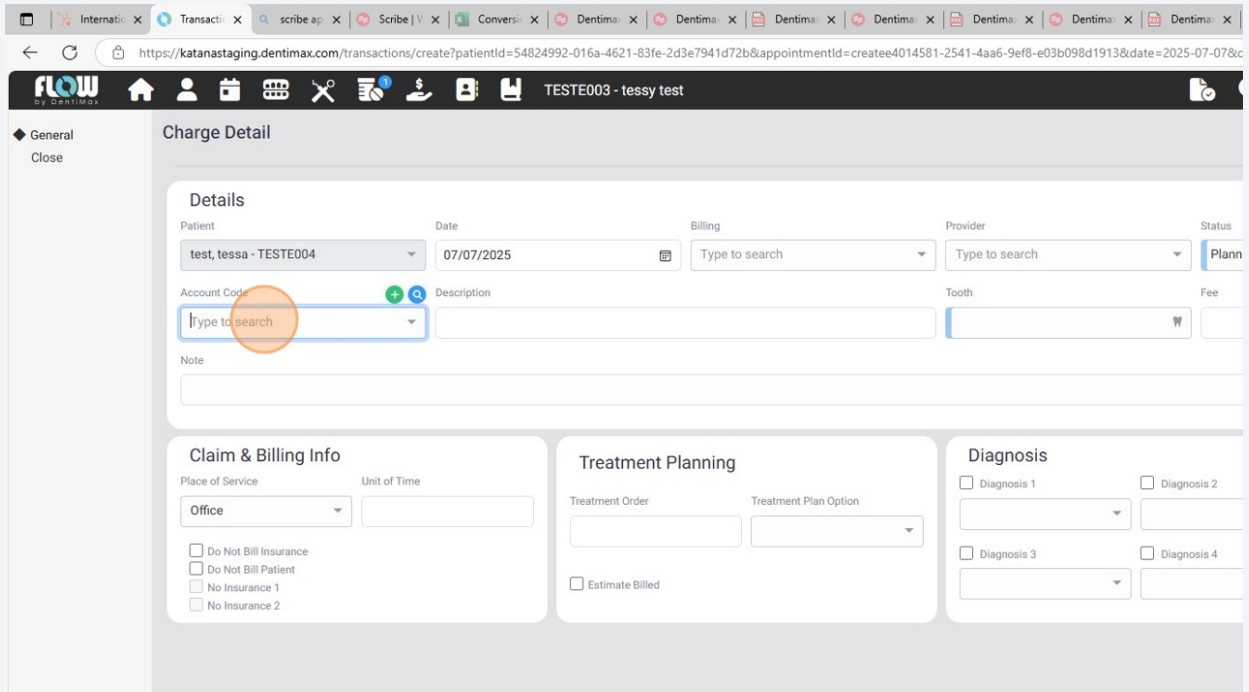
The screenshot shows the 'Appointment Details' screen. On the left, there are input fields for 'Last Name' (containing 'test'), 'Mobile Phone' (containing '(800) 704-8494'), and a checkbox for 'Place on ASAP List'. Below these is a link for 'Show Additional Info'. On the right, there are dropdown menus for 'Appointment Color', 'Status' (set to 'Unconfirmed'), and 'Recurrence' (set to 'None'). Below these are 'Resource' (set to 'OP001 - Operatory 1') and 'Provider' (with a search field 'Type to search'). A 'Notes' field contains the text 'Insert notes here ...'. To the right of the notes is a 'Provider Time' section with a 'Provider time' button. At the bottom right, there is a circular menu with three icons: a green plus sign, a blue plus sign in a folder, and a blue multi-file icon. Below this is a table with columns for 'Tooth', 'Surface', 'Fee', and 'Status'. At the bottom, there is a 'Lab Case' checkbox and a dropdown menu set to '(No Lab Work)'. The Windows taskbar is visible at the bottom of the screen.

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.

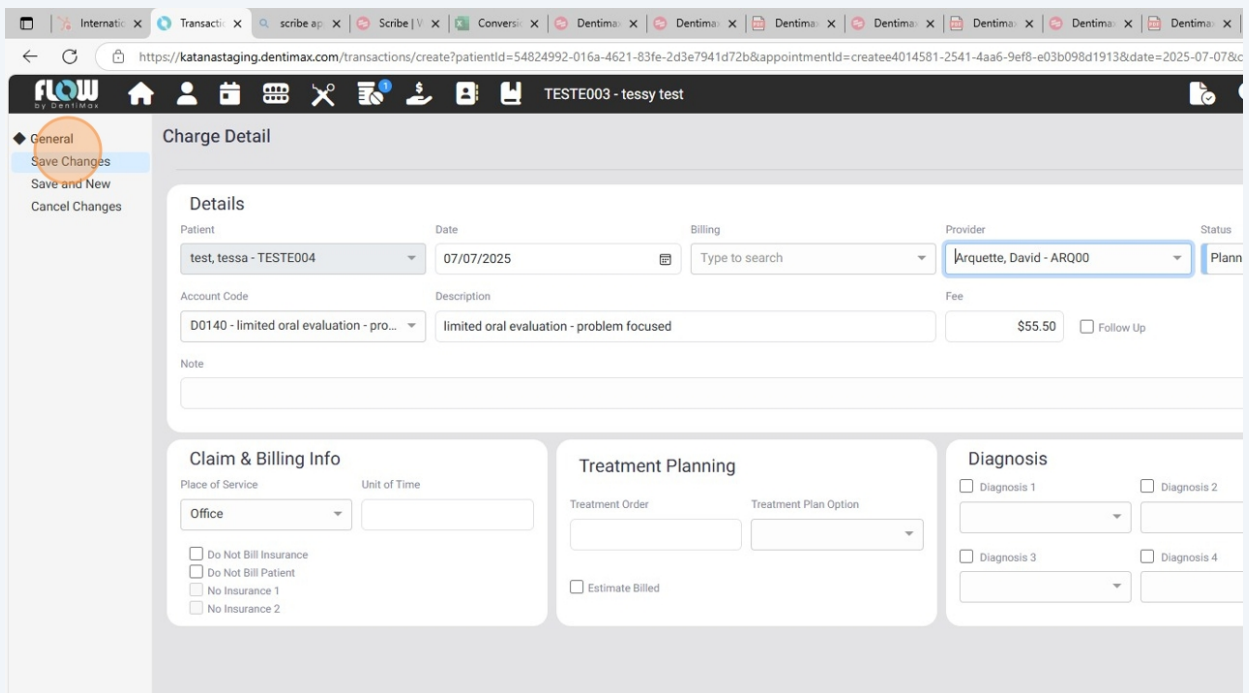
This screenshot is identical to the one above, but with a black callout box labeled 'New Treatment Item' pointing to the circular menu at the bottom right. The callout box contains the three icons: a green plus sign, a blue plus sign in a folder, and a blue multi-file icon.

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.

The screenshot shows a dental appointment form. At the top, there are fields for 'Last Name' (containing 'test'), 'Mobile Phone' (containing '(800) 704-8494'), and a checkbox for 'Place on ASAP List'. Below these is a 'Show Additional Info' link. To the right, there are dropdown menus for 'Appointment Color', 'Status' (set to 'Unconfirmed'), and 'Recurrence' (set to 'None'). Below these are 'Resource' (set to 'OP001 - Operatory 1') and 'Provider' (with a search box 'Type to search'). A 'Notes' field contains the text 'Insert notes here ...'. To the right of the notes is a 'Provider Time' dropdown set to 'Provider time'. At the bottom right of the form, a button labeled 'Add From Multicode' is circled in orange. Below the form is a table with columns: 'Tooth', 'Surface', 'Fee', and 'Status'. The first row contains 'ation - problem focused', an empty cell, '\$55.50', and 'Planned'. Below the table is a checkbox for 'Lab Case' and a dropdown menu set to '(No Lab Work)'. At the very bottom, there is a Windows taskbar with various icons and a system tray showing '108°F Sunny' and '1:42 PM 7/7/2025'.

23

example

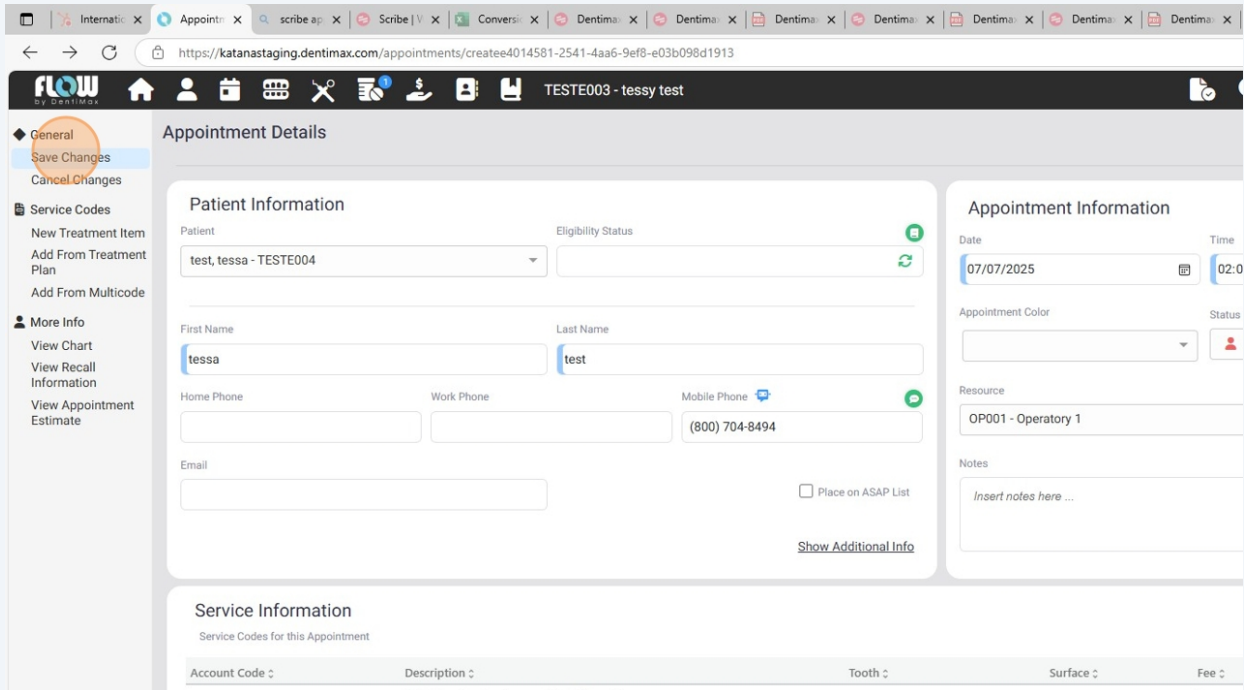
The screenshot shows the same dental appointment form as in the previous image, but with a dialog box open. The dialog box is titled 'Add From Multicode' and has a close button (X) in the top right corner. Inside the dialog, there is a list of 'Multicodes':

- 4 Quadrants of SRP
- 4 SEALANTS
- Initial Adult Visit
- Prophy, PE, 4BW
- RCT, Build up, and Crown
- RCT, Build up, and Crown Victory Royale
- Emergency Exam

The 'Prophy, PE, 4BW' item is highlighted with an orange circle. At the bottom right of the dialog is a 'Close' button. The background form is dimmed, showing the 'Patient Information' section with 'Patient' set to 'test, tessa - TESTE004' and 'Last Name' set to 'tessa'. The 'Appointment Information' section shows 'Date' as '07/07/2025' and 'Time' as '02:00 PM'. The 'Status' is 'Unconfirmed'. The 'Service Information' section shows 'Account Code' as 'D0140' and 'Description' as 'limited oral evaluation - problem focused'. At the bottom, it shows 'Account balance: \$0.00' and 'Appointment Total: \$0.00'. The 'Lab Case' checkbox is unchecked and the dropdown is set to '(No Lab Work)'. The Windows taskbar is visible at the bottom.

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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.

