

Creating New Patient APPOINTMENT ENTRY

Creating NEW PATIENT

1 Select the time on schedule

The screenshot displays a medical scheduling software interface. On the left, a sidebar menu contains the following items: 'Manage Appts' (with a sub-item 'Appointment List'), 'Create Appts' (with a sub-item 'Find Open Time Slot'), 'Check Eligibility' (with a sub-item 'For all appointments'), 'Print Route Slip' (with a sub-item 'For all appointments'), 'Patient Names', and 'Toggle Visibility'. The main area is a vertical timeline of time slots from 8:30 AM to 4:30 PM. A grey horizontal bar labeled 'Lunch' spans from 12:00 PM to 1:00 PM. An orange circle is positioned over the 3:00 PM time slot. At the bottom, there is a 'Template Mode' toggle switch and a 'View: Opt 1' dropdown menu. The Windows taskbar is visible at the very bottom of the screen.

2

For a new patient appointment; start entering patient information. Blue fields are required fields.

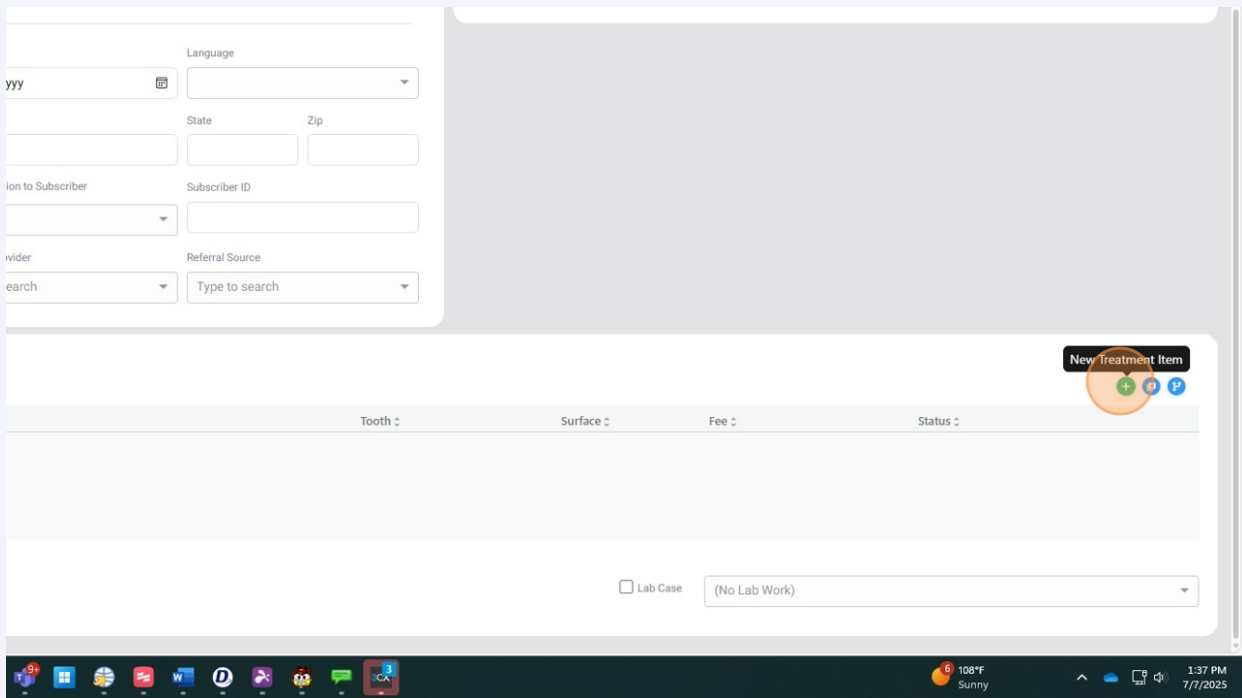
The screenshot shows the 'Appointment Entry' form in the Dentimax system. The 'Patient Information' section includes a 'Patient' dropdown menu with the text 'Search for an existing patient'. Below this are fields for 'First Name' and 'Last Name', both of which are highlighted with a blue border to indicate they are required. Other fields include 'Home Phone', 'Work Phone', 'Mobile Phone', and 'Email'. There is a checkbox for 'Place on ASAP List' and a link for 'Hide Additional Info'. The 'Additional Information' section contains fields for 'Birth Date' (format mm/dd/yyyy), 'Language', 'Address', 'City', 'State', and 'Zip'. The 'Appointment Information' section on the right includes 'Date' (07/07/2025), 'Time' (03:00), 'Appointment Color', 'Status', 'Resource' (OP001 - Operatory 1), and a 'Notes' field with the placeholder text 'Insert notes here ...'.

3

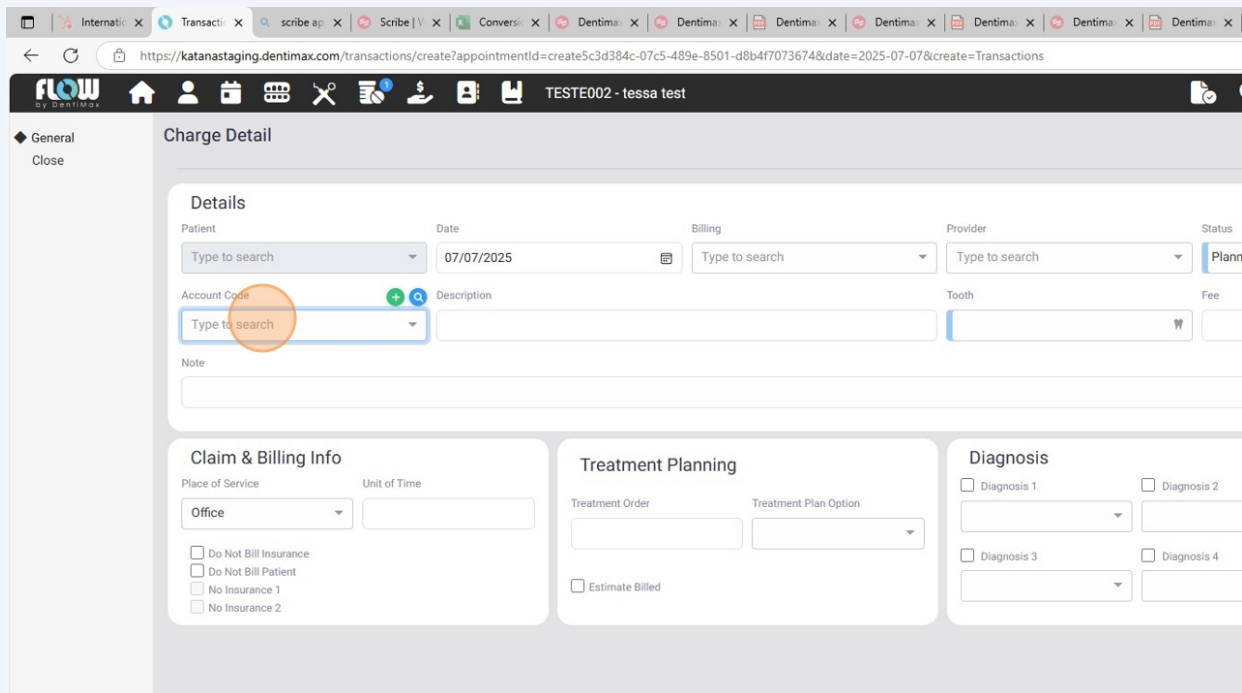
Select primary provider

This screenshot shows the 'Appointment Information' form. The 'Date' is set to 07/07/2025, 'Time' to 03:00 PM, and 'Length' to 15 minutes. The 'Appointment Color' is a dropdown menu, 'Status' is 'Unconfirmed', and 'Recurrence' is 'None'. The 'Resource' is 'OP001 - Operatory 1'. The 'Provider' field is highlighted with a blue border and contains the text 'Type to search', indicating it is a required field. There is a plus sign icon next to the provider field. The 'Notes' field has the placeholder text 'Insert notes here ...' and a 'Provider Time' button with a person icon.

4 To add procedures to the appointment, click on green +



5 Select provider and then enter procedure code



6

Click "Save Changes" if this is the only procedure for the appointment. If you need to add additional procedures click "Save and New". Once all procedures are added, click "Save Changes"

7

This is now a NEW PATIENT APPOINTMENT ENTRY (the black folder indicates that this patient does not have a patient record yet)

8 To create the PATIENT RECORD; click on the appointment

8:30 AM
8:45 AM
9:00 AM
9:15 AM
9:30 AM
9:45 AM
10:00 AM
10:15 AM
10:30 AM
10:45 AM
11:00 AM
11:15 AM
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3:30 PM
3:45 PM
4:00 PM
4:15 PM
4:30 PM

7x tassy test
D0140

Lunch

tassy test
D0140

Template Mode View: Opt 1

9 Click "Create New Patient"

dent Details

Appointment Information

Select an existing patient

Create New Patient

Date: 07/07/2025 Time: 03:00 PM

Appointment Color: Status: Unconfirmed

Resource: OP001 - Operatory 1 Provider: Arquette, David - ARQ00

Notes: Insert notes here ...

Code Information

Code	Description	Tooth	Surface	Fee	Status
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10 Click "Save Changes"

Appointment Details

General
Save Changes
Cancel Changes

Service Codes
New Treatment Item
Add From Treatment Plan
Add From Multicode

More Info
View Chart
View Recall Information
View Appointment Estimate

Patient Information

Patient: test, tessy - TESTE003
Eligibility Status: [Refresh]

First Name: tessy
Last Name: test

Home Phone: [Field]
Work Phone: [Field]
Mobile Phone: [Field]

Email: [Field]

Place on ASAP List

Show Additional Info

Appointment Information

Date: 07/07/2025
Time: 03:00

Appointment Color: [Field]
Status: [Field]

Resource: OP001 - Operatory 1

Notes: Insert notes here ...

Service Information

Service Codes for this Appointment

Account Code	Description	Tooth	Surface	Fee
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11 You will see the black folder is no longer on the appointment, now this patient has a patient record with a chart number attached.

Manage Appts
Appointment List

Create Appts
Find Open Time Slot
Check Eligibility
For all appointments
Print Route Slip
For all appointments
Patient Names
Toggle Visibility

8:30 AM
8:45 AM
9:00 AM
9:15 AM
9:30 AM
9:45 AM
10:00 AM
10:15 AM
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4:15 PM
4:30 PM

Lunch

7x tessy test
D0140
Chart Number: TESTE003

tessy test
D0140
Chart Number: TESTE003

Template Mode View: Opt 1

12 You can now search for this patient in your patient list

The screenshot shows the 'Appointment Details' page in the Dentimax system. The browser address bar displays the URL: <https://katanastaging.dentimax.com/appointments/4492c5c7-82df-4060-85df-523009ba1003>. The page title is 'TESTE003 - tetsy test'. The left sidebar contains navigation options: General (Close), Service Codes (New Treatment Item, Add From Treatment Plan, Add From Multicode), and More Info (View Chart, View Recall Information, View Appointment Estimate). The main content area is divided into three sections: 'Patient Information', 'Appointment Information', and 'Service Information'. The 'Patient Information' section includes fields for Patient (test, tetsy - TESTE003), Eligibility Status, First Name (tetsy), Last Name (test), Home Phone, Work Phone, Mobile Phone, and Email. There is a checkbox for 'Place on ASAP List' and a 'Show Additional Info' link. The 'Appointment Information' section includes Date (07/07/2025), Time (03:00), Appointment Color, Status, Resource (OP001 - Operatory 1), and Notes (Insert notes here...). The 'Service Information' section is a table with columns for Account Code, Description, Tooth, Surface, and Fee.

13 Select your patient and complete the patient profile information as needed.

The screenshot shows the 'Patient Information' page in the Dentimax system. The browser address bar displays the URL: <https://katanastaging.dentimax.com/patients/408527f5-f98f-4c5c-b7ca-aec9da1c8d12>. The page title is 'TESTE003 - tetsy test'. The left sidebar contains navigation options: General (Close, Add Family Member), More Patient Info (View Appointments, View Ledger, View Claims, Prescriptions, View Old Prescriptions, Payment Plan, Recall Details), Exam Info (View Chart, View Perio Exams, New Perio Exam, View PSR Exams), Actions (Send Forms, Print Patient Report, Check Eligibility), and Patient Defaults (Set Default Data). The main content area is divided into two sections: 'Personal Information' and 'Contact'. The 'Personal Information' section includes fields for Chart Number (TESTE003), VIP, Deceased, Not a Patient, Inactive, First Name (tetsy), Middle Initial, Last Name (test), Nickname, Birth Date (mm/dd/yyyy), Gender, Marital Status, Head of Household (Self), SIN/SSN, Driver's License, Language, and Eligibility Status (Eligibility Not Checked). The 'Contact' section includes fields for Email, Social Media, Home Phone, Work Phone, Mobile Phone, Street, Street (Cont), City, State, Postal Code, Preferred Contact Method, Preferred Scheduling Hours, and Emergency Contact Name, Phone, and Phone 2.