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# How to Send Text and Email Consent Forms



1 When you have a patient selected you go directly into the Document Center

The screenshot displays the DentiMax software interface for a patient named ARISU000 - Sunny Arizona. The interface is divided into several sections:

- Daily Patient Summary:** Shows "No appointments today" and a "Go to Scheduler | See More" link.
- Daily Revenue Goal:** A progress bar showing a current value of \$0 and a target of \$0.00. Includes a "Go to Revenue Goals" link and a "Day | Month" selector.
- DentiMax Training Videos:** A list of training resources including "DentiMax YouTube Channel", "DentiMax Overview Video", "DentiMax: Making Appoi...", "DentiMax Ledger Webinar", "DentiMax Charting Webin...", and "DentiMax Statements".
- Practice Stats (YTD):** A summary of practice performance for the year-to-date, including: Patients Seen: 0, New patients: 0, Services Provided: 0, Completed Appointments: 0, Missed Appointments: 0, and Unscheduled Treatment: 0.
- Daily Production:** A section showing a production value of \$0.
- Service Stats (7 days):** A breakdown of services provided over the last 7 days, including: New Patient: 0 (0%), Exam: 0 (0%), X-ray: 0 (0%), High-maintenance: 0 (0%), Pre-med: 0 (0%), Unscheduled TX: 0 (0%), Crown: 0 (0%), Filling: 0 (0%), and Other Services: 0 (0%).
- Daily Activities:** Shows "2 Unconfirmed Apts for the week" and "0 Recalls last week". Includes links for "Send Claims", "Route Slips", "Print Deposit Slip", "Print Statements", and "Print Day Sheet".

## 2 Click here

The screenshot shows a dashboard for 'J000 - Sunny Arizona'. A 'Doc Center' callout is visible in the top right corner, containing icons for 'Create Prescription' and 'ASAP List'. The dashboard includes several widgets: 'Daily Revenue Goal' showing \$0 against a \$0.00 target; 'DentiMax Training Videos' with links to YouTube Channel and Overview Video; 'Helpful Resources' with links for 'View Graphs', 'Calculator', and 'View Monthly Revenue'; 'Daily Production' showing \$0; 'Appointments without Note' showing 'All caught up!'; 'Daily Activities' showing 2 unconfirmed appointments and 0 recalls; and 'Common Reports' including 'Patient Aging', 'Production Summary', 'Accumulative Totals MTD', 'Referral Source Report', and 'New Patients'.

## 3 Click the blue icon to send forms

The screenshot shows the 'Document Center' for 'J000 - Sunny Arizona'. A 'Send Forms' callout is visible in the top right corner, containing a blue icon. The document center lists various categories: Handouts(2), EOB(0), Patient Registration(16), Referral Letter(0), Patient Letter(0), Saved Document(0), Signed Document(4), and Image File(0). The bottom of the dashboard shows the same 'Daily Activities' and 'Common Reports' widgets as in the previous screenshot.

#### 4 Select the form(s) you want to send by checking the box

Send Forms

Select forms to send to Sunny

<input type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	Patient Appl... (FreeD.O.M.)	Patient Application and Consent for Health Care
<input checked="" type="checkbox"/>	Patient Release	FreeD.O.M. Consent, Disclosure & Liability
<input type="checkbox"/>	Teledentistry Consent Form	FreeD.O.M. ES4U: Teledentistry
<input checked="" type="checkbox"/>	Dental Record	
<input checked="" type="checkbox"/>	Dental Record	
<input checked="" type="checkbox"/>	Test	Test Form
<input type="checkbox"/>	Retinal Exam Consent	FreeD.O.M. Informed Consent for Retinal Examination
<input checked="" type="checkbox"/>	DOH Referral Form	FreeD.O.M. Referral form
<input checked="" type="checkbox"/>	Patient Application and Consent	FreeD.O.M. Patient Application and Consent for Health Care

Total : 0

#### 5 Click "Next"

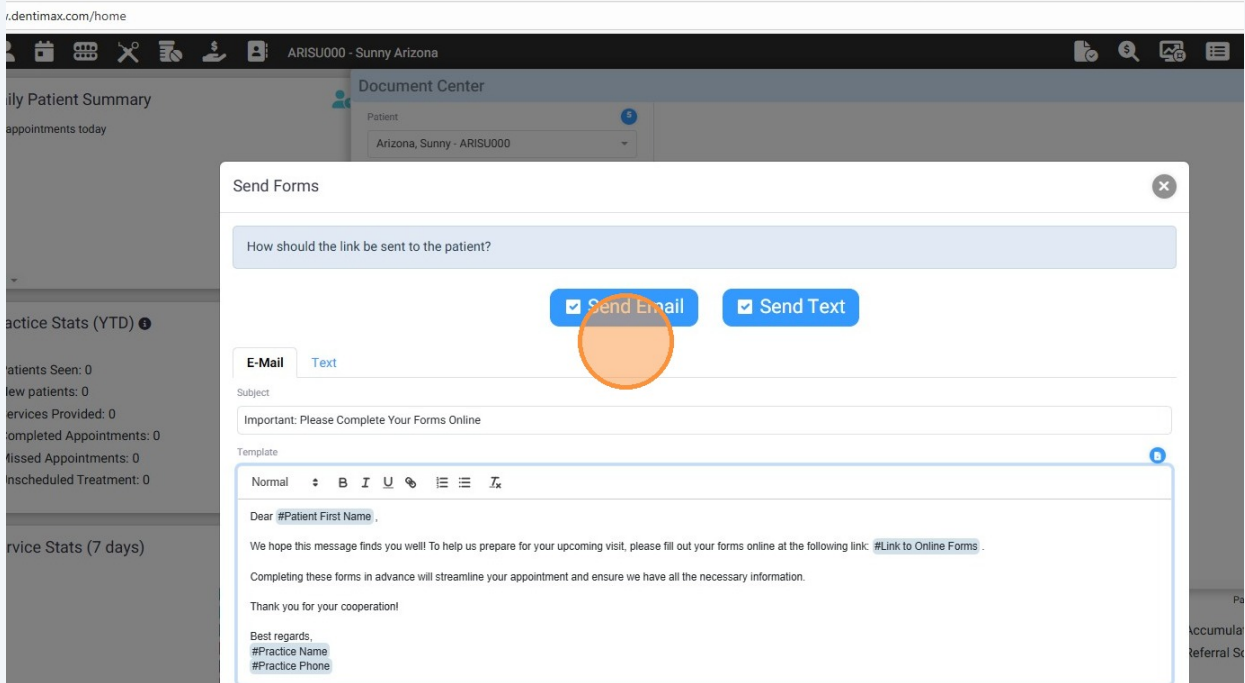
send to Sunny

	Description
apl... (FreeD.O.M.)	Patient Application and Consent for Health Care
elease	FreeD.O.M. Consent, Disclosure & Liability
try Consent Form	FreeD.O.M. ES4U: Teledentistry
cord	
cord	
	Test Form
am Consent	FreeD.O.M. Informed Consent for Retinal Examination
rral Form	FreeD.O.M. Referral form
pplication and Consent	FreeD.O.M. Patient Application and Consent for Health Care

Cancel Next

6

You can select how you want to send the form: by email or text



7

Click "Send Text + E-Mail"

