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Sending documents to patients to sign



Award-Winning Digital X-Ray Sensors
and Practice Management Software

1

If you have documents in your system, entered by our support team you can send them directly to patients to sign.

From a selected patient

The screenshot shows the DentiMax software dashboard for 'ARISU000 - Sunny Arizona'. The dashboard includes several key sections:

- Daily Patient Summary:** Shows 'No appointments today'.
- Daily Revenue Goal:** Displays a current revenue of '\$0' and a target of '\$3,500.00'.
- DentiMax Training Videos:** Lists various training resources like 'DentiMax Making Appoi...', 'DentiMax Ledger Webinar', and 'DentiMax Statements'.
- Practice Stats (YTD):** Provides a summary of practice performance, including 'Patients Seen: 49', 'New patients: 34', and 'Services Provided: 78'. It also features two donut charts: '69% New Patients' (Total: 34) and '31% Existing Patient...' (Total: 15).
- Daily Production:** A bar chart showing production levels from 12/04 to 12/10, with a peak on 12/08.
- Service Stats (7 days):** A donut chart and list of services provided, such as 'Diagnostic: 3 (75%)', 'Preventive: 1 (25%)', and 'Endodontics: 0 (0%)'.
- Daily Activities:** Shows '0 Unconfirmed Appts for the week' and '0 Recalls last week', with options to 'Send Claims', 'Route Slips', 'Print Statements', and 'Print Day Sheet'.

2 Select Document Center

The dashboard displays the following widgets:

- Daily Revenue Goal:** Shows a current revenue of \$0 and a target of \$3,500.00.
- DentiMax Training Videos:** Lists videos such as 'DentiMax: Making Appoi...', 'DentiMax Insurance Webi...', 'DentiMax Ledger Webinar', and 'DentiMax Charting Webin...'.
- Helpful Resources:** Includes links for 'Create Prescription', 'ASAP List', 'View Graphs', and 'View Monthly Revenue Calculator'.
- Daily Production:** A bar chart showing production for dates 12/04 through 12/10, with a total of 275 on 12/08.
- Appointments without Note:** Lists appointments for patients like Domenic Gutmann, David Arnett, Andrew Sipes, Clooney George, and Felicia Gutmann.
- Daily Activities:** Shows 'Unconfirmed Appts for the week' and 'Recalls last week' as 0. It includes links for 'Send Claims', 'Route Slips', 'Print Deposit Slip', 'Print Statements', and 'Print Day Sheet'.
- Common Reports:** Features 'Patient Aging', 'Production Summary', 'Accumulative Totals MTD', 'Referral Source Report', 'Accumulative Totals by D...', and 'New Patients'.

3 Click to send forms

The Document Center interface shows the following details:

- Patient:** Arizona, Sunny - ARISU000
- Sort By:** Document Category
- Document Categories:**
 - Handouts(2)
 - EOB(0)
 - Patient Registration(13)
 - Referral Letter(0)
 - Patient Letter(0)
 - Saved Document(0)
 - Signed Document(3)
 - Image File(0)
- Bottom Navigation:** Includes 'Send Claims', 'Route Slips', 'Print Deposit Slip', 'Print Statements', 'Print Day Sheet', 'Patient Aging', 'Production Summary', 'Accumulative Totals MTD', 'Referral Source Report', 'Accumulative Totals by D...', and 'New Patients'.

4 Select the forms from your list

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 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 type="checkbox"/>	Patient Application and Consent	FreeD.O.M. Patient Application and Consent for Health Care

Total : 4

Practice Stats (YTD)

- Patients Seen: 49
- New patients: 34
- Services Provided: 78
- Completed Appointments: 25
- Missed Appointments: 0
- Unscheduled Treatment: 0

Service Stats (7 days)

Insurance Management

- Outstanding Primary Insurance Claims
- Outstanding Secondary Insurance Claims
- Work Claims

Web Links

- DentIMax.com Home Page
- Dental Association
- Mango VOIP System & AI
- Dream Digital X-ray Sensors
- Gusto Payroll & HR Serv...
- Prahsys Payments & Ima...

Month Production

« Collapse Sidebar

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

Web Links

- DentIMax.com Home Page
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- Prahsys Payments & Ima...

Month Production

Office Recall Percentage

No recalls set up

6 UNCHECK both Send Email and Send Text

Send Forms

How should the link be sent to the patient?

Send Email Send Text

E-Mail Text

Subject
Important: Please Complete Your Forms Online

Template

Normal B I U

Dear #Patient First Name .

We hope this message finds you well! To help us prepare for your upcoming visit, please fill out your forms online at the following link: #Link to Online Forms .

Completing these forms in advance will streamline your appointment and ensure we have all the necessary information.

Thank you for your cooperation!

Best regards,
#Practice Name
#Practice Phone

7 Click "Don't Send Message"

Document Category

Handouts(2) EOB(0) Patient Registration(13) Referral Letter(0)

link be sent to the patient?

Send Email Send Text

Back **Don't Send Message**

Document Category

Handouts(2) EOB(0) Patient Registration(13) Referral Letter(0)

Web Links

DentMax.com Home Page Dream Digital X-ray Sensors

Dental Association Gusto Payroll & HR Service Mango VOIP System & AI Prahsys Payments & Im...

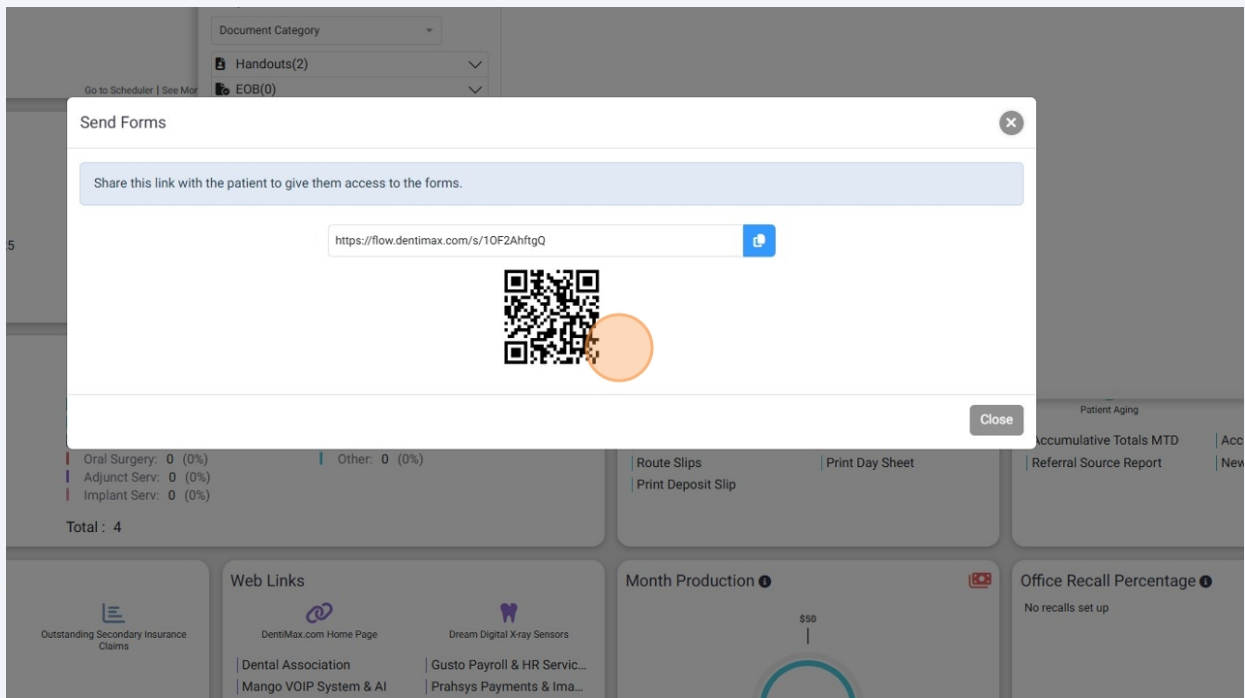
Month Production

\$50

Office Recall Percentage

No recalls set up

8 This will create the QR code that you/patient can scan to sign form online



9 This is what it would look like for a patient to sign. Once they sign it will automatically be saved in patient Document Center

